



**LANE WORKFORCE**  
PARTNERSHIP



# STATE OF THE **WORKFORCE**

2020

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## Message from the Executive Director

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It has been a challenging year. From the COVID-19 pandemic that has spread across the globe, to the devastating wildfires that hit the entire western seaboard of the United States, Lane County, the state of Oregon, the United States and the entire world have experienced major economic changes. As the staff of Lane Workforce Partnership prepared this report, we reflected on how these changes have impacted our communities and the people we serve. We sincerely hope that as we enter 2021, we will realize major improvements that will give us a reason to celebrate.

This report focuses on our current workforce system and how it relates to the local Workforce Development Board's (WDB) goals with a specific look at the challenges we face in our communities around diversity, equity and inclusion. While developing this report, we intentionally sought to identify just how diverse (or not) our workforce is, and gathered extensive data to highlight the economic diversity in Lane County.

We then challenged our thinking and biases with questions such as:

- What are the challenges we face based on the makeup of our workforce?
- If our current workforce trends continue, how will it impact our economic recovery from COVID-19 and our growth overall?
- What are the economic consequences of income gaps when certain populations are left out and left behind?
- If the digital divide continues, will children in our rural communities get a decent education or will they be left behind those with broadband access?

We invite you to take a journey through our findings. While we don't have all the answers, we hope this report gets you thinking about our economic challenges and how we can collectively work to make Lane County a safe, healthy, diverse and great place to work, live and play for all of its citizens for years to come.

A handwritten signature in black ink that reads "Kristina Payne". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Kristina Payne

# Introduction to Lane County's Workforce System

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Lane Workforce Partnership's (LWP) workforce system encompasses all of Lane County from the coast to the Cascade Range, and borders our neighboring counties to the north and south. Geographically, the region encompasses 4,722 square miles — the same size as the entire state of Connecticut. The region is primarily rural with the Eugene and Springfield metropolitan area located approximately at the center of the county.

Our region boasts great [recreational areas](#) including parks, rivers, lakes, hiking trails and coastal attractions. We are home to the [University of Oregon](#), a public flagship research university with educational offerings that attract students from across the nation and the world. We also have a strong community college, [Lane Community College](#), with advanced and specialized offerings to meet the needs of our diverse regional economy; 94 percent of those enrolled at LCC are Lane County residents. In addition to the long-established wood products industry still present in Lane County, we have seen the area develop additional major industry hubs in health care, information technology and food and beverage manufacturing.

Lane County's workforce system is part of the larger Oregon Workforce Development System. The statewide workforce development system helps the emerging (youth/young adults ages 14–24), transitional and current workforce obtain and succeed in family-wage jobs. In addition, the Oregon Workforce Development System assists businesses in finding top candidates for job openings and works to find solutions to workforce challenges. In Oregon, there are nine local [Workforce Development Boards](#) responsible for brokering services for adults, dislocated workers, youth/young adults

and businesses through the Workforce Innovation and Opportunity Act (WIOA). In Lane County, [Lane Workforce Partnership](#) is the administrative arm of the local Workforce Development Board.

The WIOA emphasizes alignment of a coordinated workforce system. As a result, in Lane County the workforce service delivery system is a collaborative that includes:

- [Department of Human Services](#).
  - Self-sufficiency programs.
  - Vocational rehabilitation.
- [Department of Education](#)
  - Lane Community College.
  - K–12 school districts.
- [Oregon Commission for the Blind](#).
- [Oregon Employment Department](#).

A majority of services to job seekers and business customers are provided out of the [WorkSource Lane Centers](#) in Eugene and Florence, and the Oregon Department of Human Services offices in Eugene, Springfield and Cottage Grove. Most services to Lane County's youth and young adult populations are provided by youth service providers under contract with LWP.

**MISSION:** TO MEET THE  
WORKFORCE NEEDS OF  
EMPLOYERS AND INDIVIDUALS  
THROUGH PARTNERSHIPS AND  
INNOVATION.

**VISION:** LANE COUNTY WILL  
HAVE A TRAINED WORKFORCE  
AND INDIVIDUALS WILL HAVE  
THE KNOWLEDGE AND SKILLS  
FOR CAREER SUCCESS.

# 2020-2024 Strategic Plan

During the last half of 2019, the Lane Workforce Development Board met to develop a strategic plan to guide planned work from 2020 to 2024. The board's goals fall into two categories.



Students learn skills firsthand during a job shadow at Figoli & Quinn as part of Elevate 2020.

## CATEGORY 1 : SUPPORT INDUSTRY & WORKERS IN A CONSTANTLY CHANGING ECONOMY

### GOAL 1

*Prepare workers for self-sufficiency employment in a new and changing economy.*

- Analyze worker self-sufficiency data driven by systemic challenges (e.g. housing, child care, legislative policy).
- Be the community voice for individual workers seeking self-sufficiency employment.
- Broker relationships to create solutions to address identified systemic challenges.
- Build capacity to support innovative solutions by seeking incremental funds for investment.

### GOAL 2

*Connect individuals to education, skill-building and employment opportunities in occupations most impacted (aging workforce, technology impacts).*

- Invest in training programs including on-the-job training, apprenticeships and customized training focused on replacement opportunities for youth/young adults in jobs most impacted by retirement and other types of projected worker shortages.
- Analyze the impact of artificial intelligence/technology on worker displacement.
- Invest in career pathway models.

### GOAL 3

*Prepare our youth for future employment.*

- Invest in proven strategies and partner with successful youth programs (e.g. Connected Lane County, Chamber's Work Ready initiatives, high school CTE programs) to better align industry and education to increase student access to work opportunities.
- Be the community voice to improve policy makers' understanding of and willingness to remove apprenticeship pipeline barriers.



Photo by [Christina Morillo](#) from [Pexels](#).

## CATEGORY 2 : MOVE THE DIAL ON SYSTEMIC CHALLENGES

### GOAL 4

**Catalyze the community around diversity, equity and inclusion (DEI) to expand workforce leadership and participation opportunities for all.**

- Be a catalyst for systemic change that raises DEI to the level of sector strategy.
- Convene an advisory board as a model of DEI leadership.
  - Research and evaluate DEI “state of workforce.”
  - Gather and disseminate learning.
- Invest in workforce board training to understand unconscious bias and lead by example.
- Embed DEI in all LWP policies.

### GOAL 5

**Align strategic partnerships to expand our collective capacity to address systemic workforce challenges (housing, child care, legislative policies).**

- Continue to invest in sector strategy work.
- Analyze impacts of technology on industry employment and workforce training.
- Identify and share job skills with current and emerging workforce.
- Analyze, gather and disseminate projected data about job evolution/changes/growth.
- Be the voice to create understanding of self-sufficient wages in our community.

# Economy, Trends and Statistics

## ECONOMIC TRENDS

The economy in Lane County has diversified over the past three decades from one that was largely dependent upon the wood products industry to one that is high-tech, forward thinking, environmentally conscious and diverse (table 1). Food product manufacturers have found niches in craft beer and organic products; the tech sector has added firms; the county has grown into a regional health care hub; and state and federal government agencies (including the University of Oregon) have added to the diversity.

In early 2020, Lane County’s economy was in the midst of the longest expansion in recent history, adding 22,400 jobs (growth of 16 percent) from September 2012 through February 2020 (figure 1). Several industries contributed to the rebound including

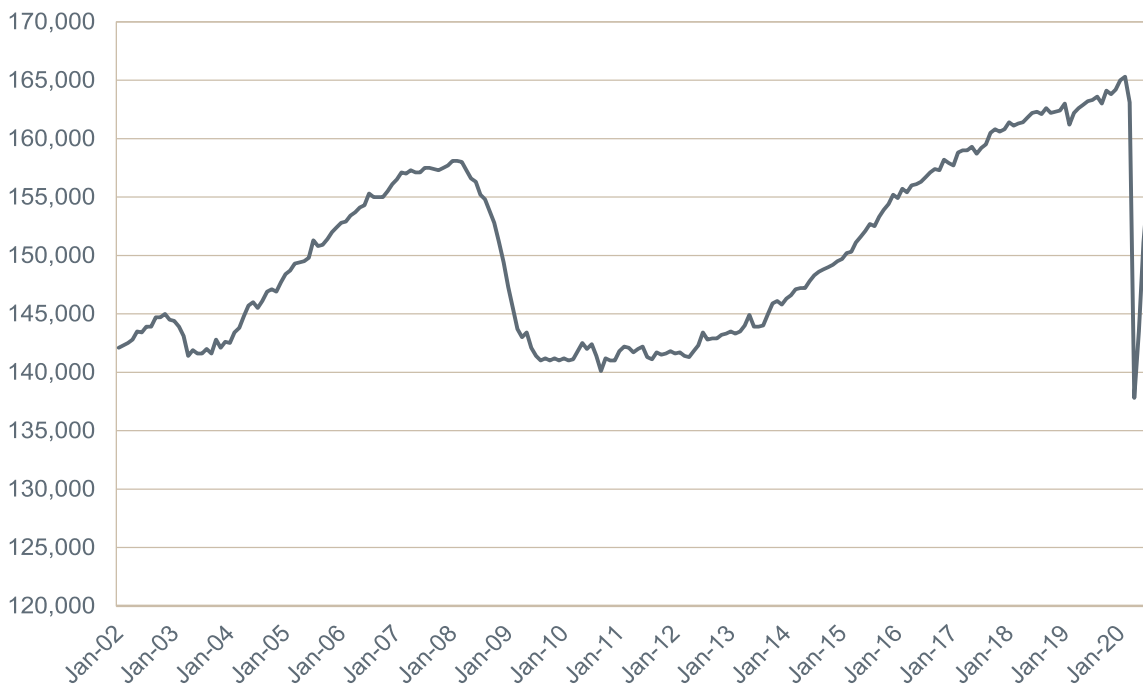
manufacturing, construction, professional and business services and health care.

**Table 1: Lane County Employment 2019**

Education and Health Services	18%
Government	18%
Retail Trade	12%
Professional and Business Services	11%
Leisure and Hospitality	11%
Manufacturing	9%
Financial Activities	5%
Construction	5%
Wholesale Trade	4%
Other Services	3%
Transportation, Warehousing and Utilities	2%
Information	1%
Mining and Logging	1%

Source: Oregon Employment Department

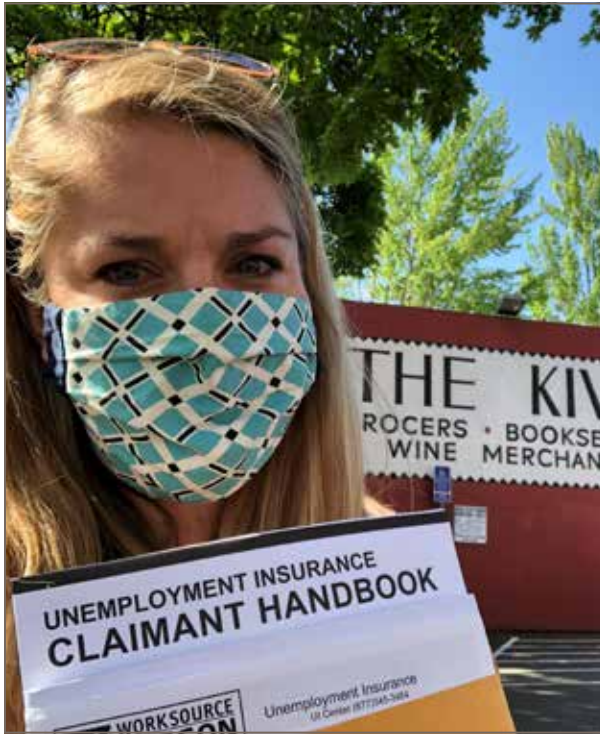
**Figure 1: Lane County Total Nonfarm Employment**  
seasonally adjusted



Source: Oregon Employment Department



## LANE WORKFORCE PARTNERSHIP



Hillary Moran, Lane County dislocated worker liaison, reached out to businesses, offering informational packets, advice and virtual rapid response sessions to help those unemployed due to COVID-19 navigate resources.

The growth came to an abrupt end in March 2020, when the COVID-19 pandemic reached Oregon. Due to people staying home and restrictions on activities with close contact to avoid spreading the virus, economic activity slowed significantly. In Lane County, small job

losses experienced in March became major job losses in April. Between February and April, Lane County lost about 24,900 jobs — a drop of 15.1 percent — while the unemployment rate increased from a record low of 3.5 percent to a record high of 16.0 percent.

All major sectors lost jobs. The first and most restrictive measures were placed on restaurants and bars, severely impacting the leisure and hospitality industry. The sector lost 9,200 jobs, or a little more than half of all jobs in the industry. Other service industries, including personal services like hair stylists and tattoo artists, dropped about 20 percent. Health care and social services dropped 16 percent, largely from closures of doctors' and dentists' offices.

The durable goods industries of construction and manufacturing were least affected by COVID-19 restrictions, losing about 7 percent each. Food and beverage stores actually increased employment, adding about 4 percent as additional staff for grocery pick-up services needed to be hired.

Employment estimates show a rapid but slowing rebound. By August, Lane County had gained back 65 percent of the jobs lost in March and April while the unemployment rate decreased to 7.5 percent. The industries that



Nosh Eatery in Old Town Florence, Oregon participating in the "Streatery" program.

lost the most jobs due to restrictions generally had the largest gains during the recovery, including leisure and hospitality, retail trade and health care and social assistance.

## LABOR MARKET

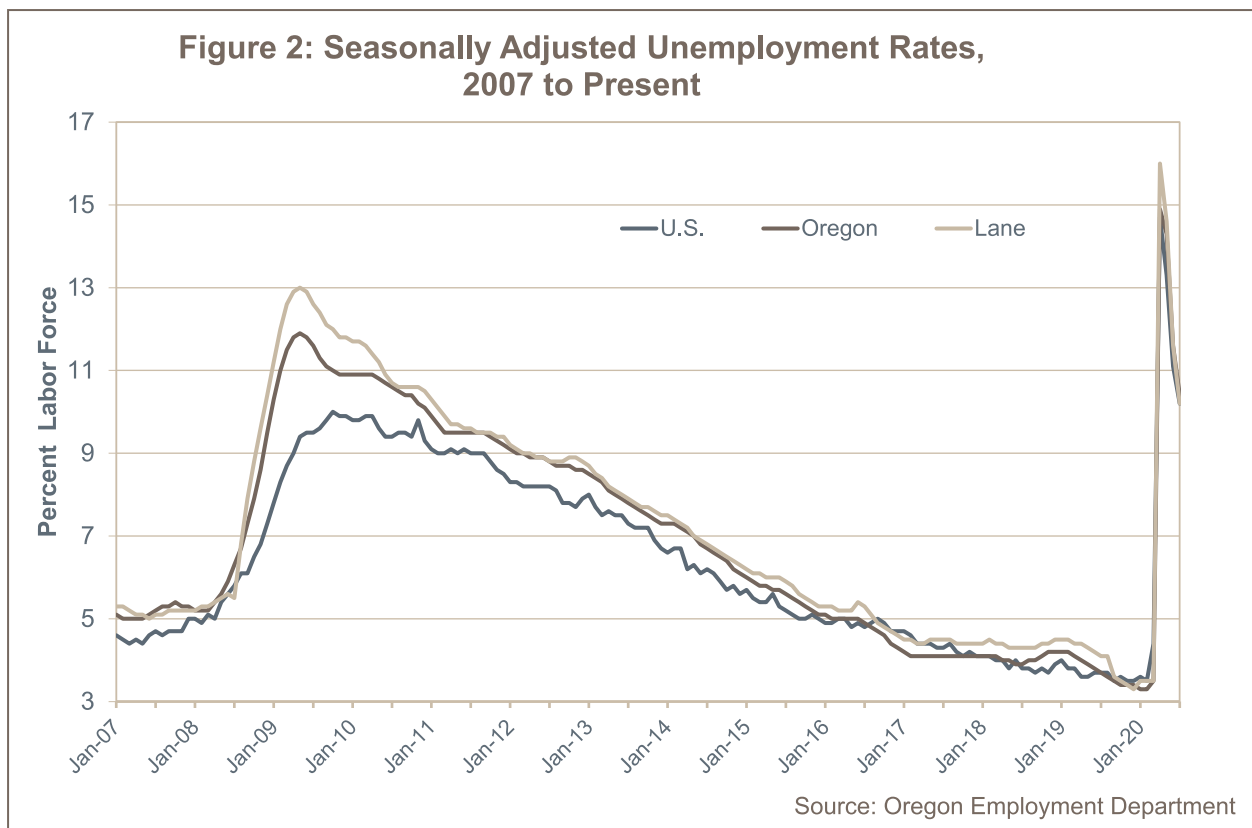
Fortunately, a large portion of the job losses due to the pandemic are expected to be temporary. Many of the COVID-19-related restrictions that caused business closures were loosened quickly for some of the hardest hit businesses such as restaurants, bars, gyms, hotels, hair stylists and retail stores if masks were worn and social distancing could be practiced. This allowed for an initial rapid return to work for the first few months as the economy reopened.

Figure 2 shows that, as of the writing of this publication, the labor market is improving. New initial claims for unemployment insurance have slowed, although they are still elevated compared to the same period in 2019. The

county's unemployment rate has generally followed national and state trends, though it peaked at a slightly higher rate of 16 percent in April 2020. Since then, it has dropped to 7.5 percent. As time passes, more workers will be looking for work as some layoffs become permanent or the wait to return from a temporary layoff becomes too long. This and new entrants increase the pool of available workers compared to before the COVID-19 restrictions, when the unemployment rate was at a record low and there was continued employment growth.

## WILDFIRE IMPACT

The unprecedented wildfires that spread across Oregon in September disrupted economic activity in Lane County. Businesses had to close their doors because of poor air quality, and in eastern Lane County the fires threatened physical safety and forced evacuations.





View from Mt. Hagan showing the aftermath of the Holiday Farm fire. Photo by Raymond J. Hardman.

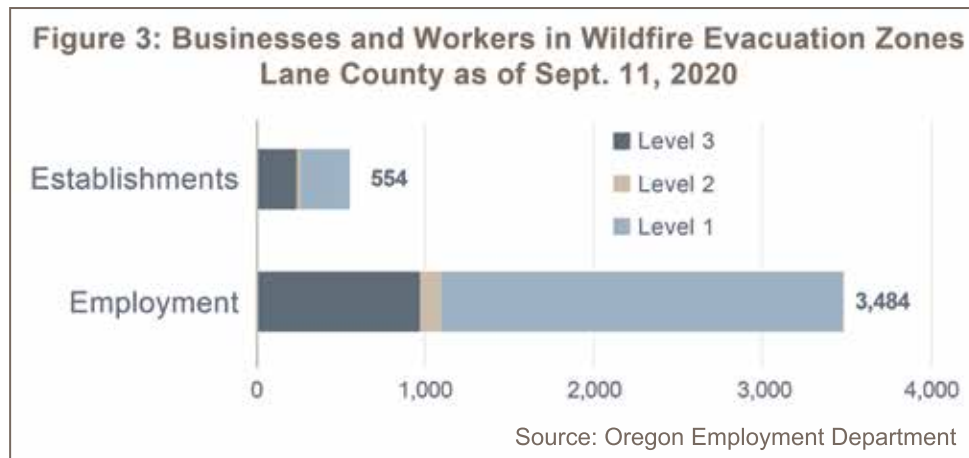
We do not yet have a full picture of the economic impact of the fires. However, using geocoded data from the fall of 2019 (the most recent data available), the Oregon Employment Department was able to estimate the number of businesses and workers located in evacuation zones in Lane County due to the Holiday Farm fire at its peak (figure 3). Nearly 1,000

### LANE COUNTY'S EMPLOYMENT GROWTH

The 2019 to 2029 Lane County employment projections are long-term projections intended to capture structural changes in the economy, not cyclical fluctuations. Although some short-term effects of the recession caused by

the COVID-19 pandemic are considered, the forecast does not fully capture the long-term structural changes that may occur.

Fortunately, the recovery from the recession is expected to be faster than other deep recessions,



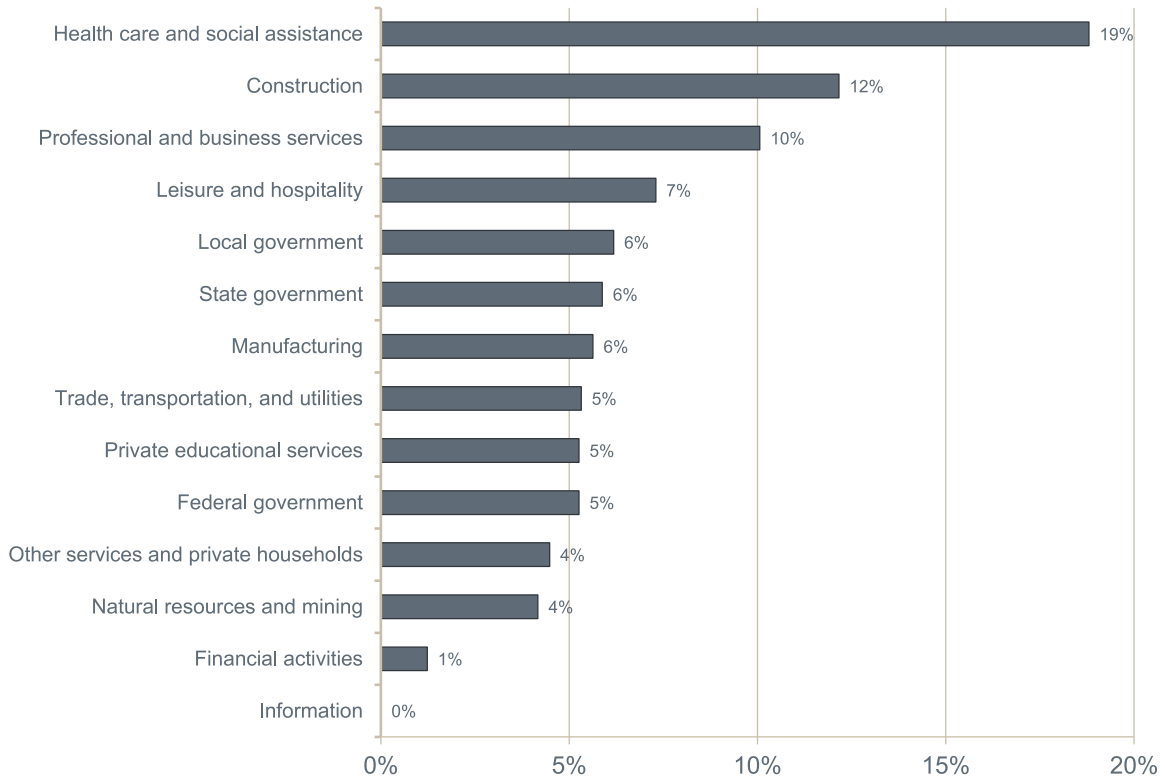
workers at 250 business establishments were under level 3 evacuation orders (immediate evacuation). More than 2,500 workers at 325 businesses were under level 2 (be ready to evacuate at a moment's notice) and level 1 (alert) status.

This impact is substantial, but it's an undercount. It doesn't include the self-employed, nor does it account for the impact of smoke and air quality on economic activity outside of evacuation areas.

resulting in positive growth over the 10-year period. In Lane County, some industries are expected to experience especially strong growth between 2019 and 2029 including health care, professional and business services and trade, transportation and utilities. All Lane County industries except information are expected to add jobs from 2019 to 2029 (figure 4, page10).

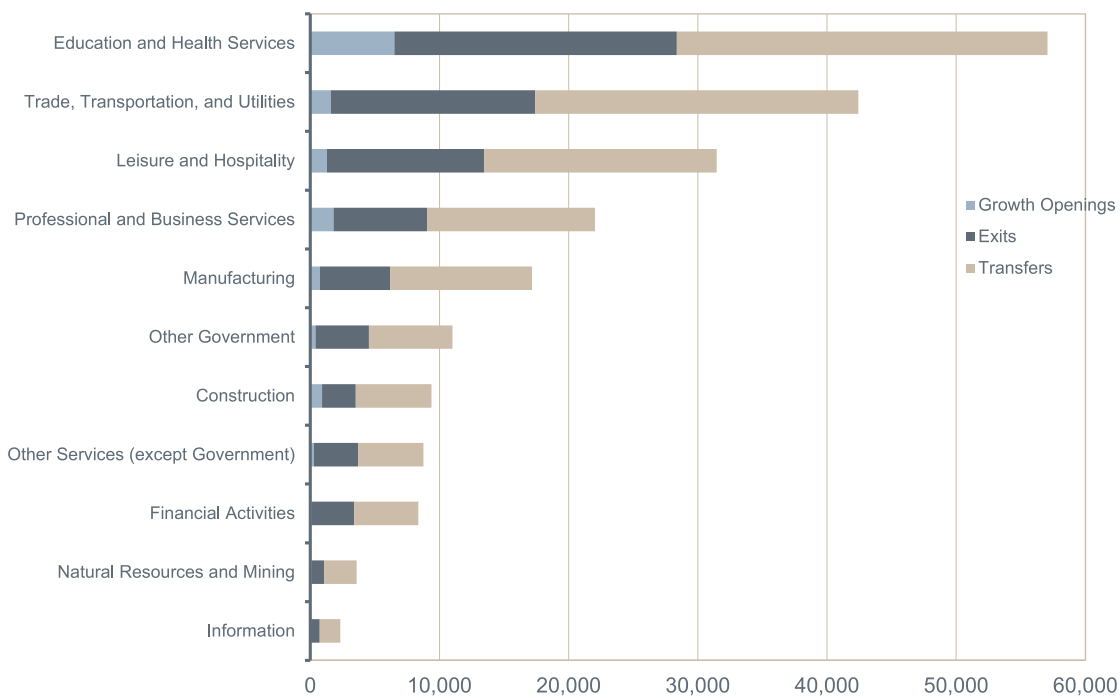
Lane County will add 14,000 jobs between 2019 and 2029. This represents an 8 percent

**Figure 4: Lane County Long-Term Employment Growth Percent Change, 2019-2029**



Source: Oregon Employment Department

**Figure 5: Lane County Projected Job Openings by Industry Growth and Replacement, 2019-2029**



Source: Oregon Employment Department

increase in employment, slightly lower than the statewide increase of 9 percent over the same period. The growth stems from anticipated private sector gains of 12,000 jobs (9 percent) and the addition of 1,800 jobs (6 percent) in government. The projected growth rate is less than the 14 percent growth rate seen over the past decade.

Even in industries expected to grow slowly, there will be opportunities created by replacement needs (figure 5, page 10). Replacement needs are created when someone permanently leaves an occupation, commonly by retiring, and does not include regular turnover. As the population ages and retirements increase, the level of replacement openings will increase.

## WAGES

Real average wages in Lane County steadily increased in the 1990s with the addition of technology manufacturing and stabilization in the wood products industry. Wages peaked in 2004 at \$42,415, an increase of \$4,115 (11 percent) from the low point in 1990. Wages then became stagnant until the end of the Great Recession. In 2019, an improved labor market and low overall inflation caused real average annual wages to top \$45,000 for the first time since 1979 at \$45,199.

This increase in real wages was not enough to keep the wage gap between Lane County and the rest of the state from expanding (figure 6, page 12). In 1990, Lane County wages were 10 percent less than the rest of the state. By 2000, the gap had expanded to 19 percent, largely due to rapid growth in tech manufacturing in the Portland area. After some small improvement in the early 2000s, the wage gap with the rest of the state began to grow again after 2010, reaching 24 percent in 2019.

An industry mix made up of lower-paying industries compared to the Portland area explains some of the wage gap between

## LANE COUNTY EMPLOYMENT GROWTH HIGHLIGHTS 2019-2029:

- Health care and social assistance will add 5,000 jobs and have the fastest 10-year growth (19 percent) due to a growing and aging population.
- Professional and business services will add 1,800 jobs, partly from growth in the tech sector.
- Trade, transportation and utilities will add 1,600 jobs, largely from growth in wholesale trade and distribution due to e-commerce.
- Local government will add 1,600 jobs, largely in education and including the addition of the Knight Science Campus at the University of Oregon.
- Slowed by COVID-19 restrictions, leisure and hospitality will still add 1,300 jobs due to tourism and retiree demand.
- Construction was one of the industries least affected by COVID-19 restrictions and has the second fastest forecasted growth rate. Propelled by the need to fill low housing inventory, the industry is expected to add 900 jobs.
- Manufacturing will grow by 800 jobs. Durable goods manufacturing will grow due to the addition in electronics from new employment at Stratacache. Non-durable goods manufacturing will grow, adding 400 jobs, largely from food and beverage manufacturing.

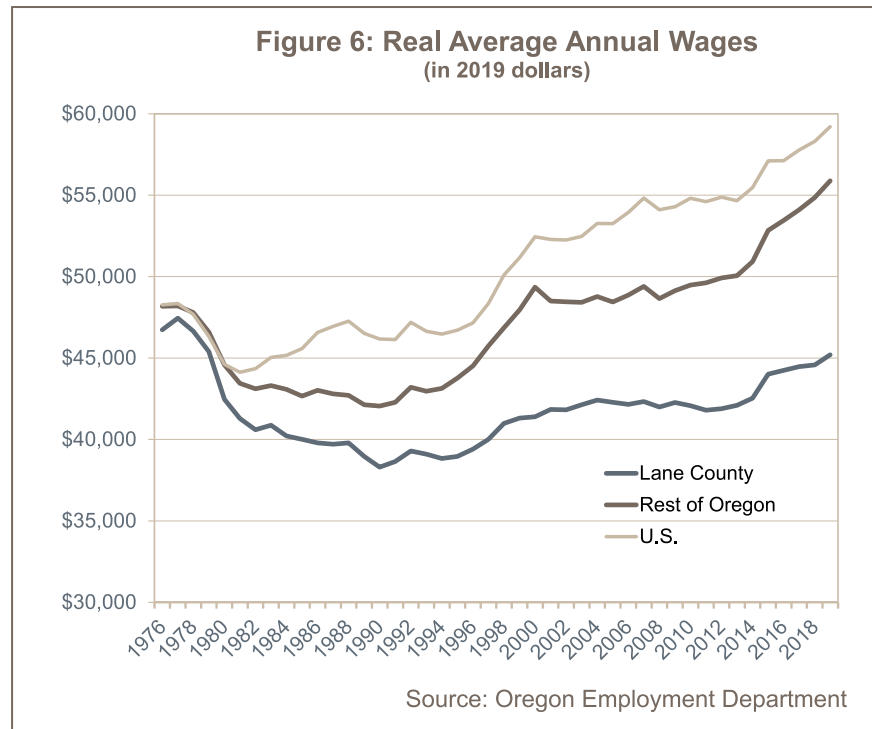
Lane County and the rest of the state. The University of Oregon provides a ready supply of new graduates to fill entry-level professional positions, which contributes to keeping wages low for those occupations due to high competition. Additionally, quality of life factors

can cause workers to accept a lower wage in order to continue living in a desirable area. In Lane County such factors as less congestion, proximity to outdoor recreation and lower housing prices may therefore explain some of the wage difference between Lane County and the rest of Oregon.

Although the earnings of the average worker in Lane County were \$45,199 in 2019, roughly 57 percent of jobs earned less. In Lane County, most of the largest occupations pay less than the average wages for all occupations (table 2, page 13). For example, fast food counter workers, home health care workers and



Photo by [pasja1000](#) on [pixabay](#).



cashiers earn less than \$30,000. Registered nurses and general operations managers are the exception for large occupations, with pay averaging \$94,931 and \$97,115 respectively.

## EDUCATION

Historically, a majority of jobs in Lane County required little in the way of training or education. New trends show that some of the fastest growing occupations require postsecondary education and training even for entry-level work (table 3, page 14). About 62 percent of positions expected to be added from 2019 and 2029 will require a high school diploma or less; many of these jobs are lower-paying service and retail occupations. To be truly competitive, however, 49 percent of openings will require post-secondary education or training over the 10-year period. Jobs that require postsecondary education and training are expected to grow 10 percent, compared to 8 percent for all occupations. Those requiring some sort of college degree will grow by 11 percent.

## LANE WORKFORCE PARTNERSHIP

<b>Table 2: Largest Occupations and Highest Paying Occupations in Lane County</b>		
<b>Largest Occupations</b>	<b>2019 Employment</b>	<b>2020 Average Wages</b>
Fast Food and Counter Workers	6,369	\$27,768
Retail Salespersons	4,792	\$33,342
Home Health and Personal Care Aides	4,246	\$29,099
Cashiers	4,035	\$28,912
Registered Nurses	3,369	\$94,931
Office Clerks, General	3,172	\$37,294
Stockers and Order Fillers	2,787	\$32,552
General and Operations Managers	2,656	\$97,115
Waiters and Waitresses	2,656	\$29,432
Secretaries and Administrative Assistants, Except Legal, Medical and Executive	2,647	\$39,666
Bookkeeping, Accounting and Auditing Clerks	2,261	\$40,165
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,246	\$30,930
Customer Service Representatives	2,224	\$35,360
Teaching Assistants, Except Postsecondary	2,158	\$31,802
Truck Drivers, Heavy and Tractor-Trailer	1,958	\$50,086
<b>Highest Paying Occupations</b>	<b>2017 Employment</b>	<b>2018 Average Wages</b>
Physicians, All Other and Ophthalmologists, Except Pediatric	390	\$260,229
Psychiatrists	95	\$226,221
Dentists, General	138	\$220,688
Family Medicine Physicians	150	\$181,272
Chief Executives	83	\$171,392
Judges, Magistrate Judges and Magistrates	29	\$170,643
Pharmacists	385	\$139,984
Business Teachers, Postsecondary	133	\$137,579
Physician Assistants	168	\$131,810
Nurse Practitioners	102	\$130,333
Architectural and Engineering Managers	88	\$129,646
Postsecondary School Administrators	259	\$121,742
Sales Managers	400	\$116,418
Elementary and Secondary School Administrators	255	\$113,533
Supervisors and Managers of Police and Detectives	79	\$109,034

Source: Oregon Employment Department

## LANE WORKFORCE PARTNERSHIP

**Table 3: Lane County Forecasted Typical Educational Attainment**

<b>Typical entry-level education</b>						
<b>Education</b>	<b>2019 Employment</b>	<b>2029 Employment</b>	<b>Employment Change</b>	<b>Percent Change</b>	<b>Replacement Openings</b>	<b>Total Openings</b>
Doctoral or professional degree	2,732	3,044	312	11.4%	1,098	1,410
Master's degree	4,574	5,175	601	13.1%	3,941	4,542
Bachelor's degree	31,987	35,191	3,204	10.0%	28,451	31,655
Associate degree	3,838	4,299	461	12.0%	3,597	4,058
Postsecondary training (non-degree)	18,302	19,977	1,675	9.2%	19,748	21,423
High school diploma or equivalent	64,006	68,004	3,998	6.2%	77,333	81,331
Less than high school	47,956	52,073	4,117	8.6%	75,780	79,897
<b>Typical competitive-level education</b>						
<b>Education</b>	<b>2019 Employment</b>	<b>2029 Employment</b>	<b>Employment Change</b>	<b>Percent Change</b>	<b>Replacement Openings</b>	<b>Total Openings</b>
Doctoral or professional degree	6,160	6,850	690	11.2%	4,005	4,695
Master's degree	9,533	10,659	1,126	11.8%	8,856	9,982
Bachelor's degree	32,175	35,336	3,161	9.8%	29,460	32,621
Associate degree	16,361	16,801	440	2.7%	17,451	17,891
Postsecondary training (non-degree)	36,215	39,399	3,184	8.8%	42,576	45,760
High school diploma or equivalent	72,951	78,718	5,767	7.9%	107,600	113,367

Source: Oregon Employment Department

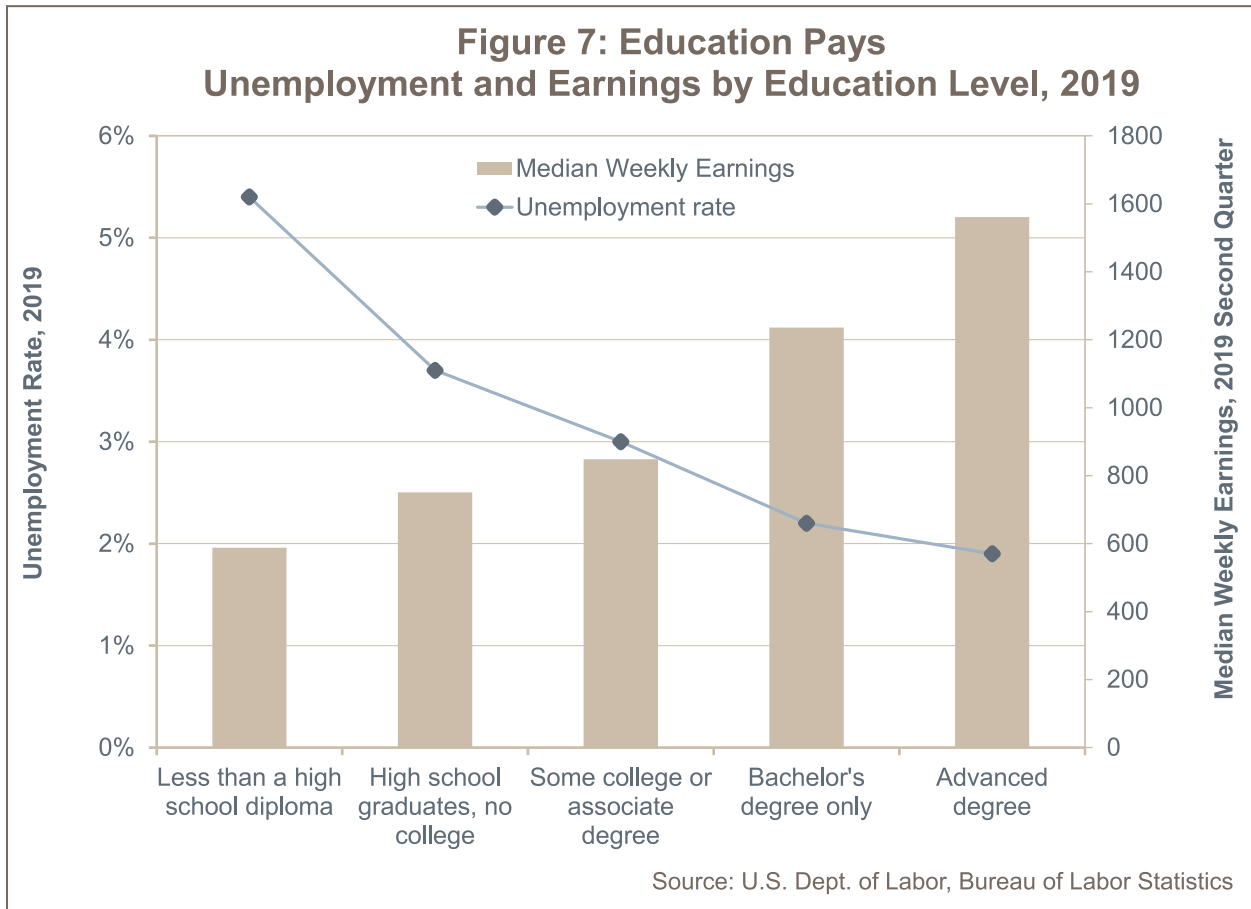
Data for the U.S. shows a direct correlation between education level, earnings and unemployment. The higher the education level achieved, the higher the pay and the lower the chances of being unemployed (figure 7, page 15). People with less than a high school diploma averaged \$588 in weekly earnings and an unemployment rate of 5.4 percent in 2019, while people with a bachelor's degree earned \$1,561 in weekly earnings and had a 1.9 percent unemployment rate.

Lane County's educational attainment levels have increased over time. The share of the 25 and older population with less than a high school degree declined from 17 percent in 1990 to 8.6 percent in 2018, while the share with a bachelor's degree or higher increased from 22.2 percent to 29.6 percent. In 2018, the percentage of the population 25 and older

with less than a high school diploma was lower in Lane County (8.6 percent) than Oregon (9.6 percent) and the U.S. (12.3 percent). The population with a bachelor's degree or higher was about the same in Lane County at 30 percent, compared to 33 percent for Oregon and 32 percent for the U.S. (table 4, page 15).

Photo by [Startup Stock Photos](#) from [Pexels](#).





#### Table 4: 2018 Educational Attainment in Population 25 Years and Older

	Lane County	Oregon	United States
% Less than high school	8.6%	9.6%	12.3%
% High school grad or higher	91.4%	90.4%	87.7%
% Associate degree	9.6%	8.8%	8.4%
% Bachelor's degree or higher	29.6%	32.9%	31.5%

Source: 5 - Year American Community Survey

## KEY MESSAGES FOR EDUCATIONAL REQUIREMENTS IN LANE COUNTY:

- Approximately 28 percent of Lane County’s projected growth and replacement job openings will require postsecondary education or training for the typical entry-level educational requirement.
- A little less than half of these openings will require postsecondary education or training from candidates who want to be truly competitive.
- Roughly 63 percent of high-wage, high-demand job openings require postsecondary education or training.

## OREGON'S MINIMUM WAGE LAW

On March 2, 2016, Senate Bill 1532 was signed into law. As a result, Oregon's minimum wage will increase in steps through 2022. There are three tiers (standard, Portland Metro and non-urban counties) of step increases based on geography.

Lane County is in the standard tier. By 2022, Lane County's minimum wage will increase to \$13.50. The most recent increase in the minimum wage took place on July 1, 2020, bringing it to \$12.00 (table 5).

**Table 5: Lane County Minimum Wage Increase**

2016.....	\$9.75
2017.....	\$10.25
2018.....	\$10.75
2019.....	\$11.25
2020.....	\$12.00
2021.....	\$12.75
2022.....	\$13.50

The Oregon Employment Department made a conservative estimate of the number of jobs affected by the minimum wage increase by looking at how many jobs paid at or below the new minimum wage level in the third quarter of 2019. During that period, approximately 11,586 (6.6 percent) jobs paid at or below the new minimum wage scale in Lane County.

## RURAL LANE COUNTY

Rural Oregon faces several headwinds when it comes to securing economic prosperity.

Rural areas have lower wages and higher unemployment in general than urban Oregon, which holds true in Lane County.

For the purposes of this data, urban Lane County is defined by the urban growth boundaries of Eugene and Springfield; the rest of the county is considered rural.

**Table 6: 2018 Annual Average Wage**

Rural Lane County	\$37,818
Lane County Total	\$43,503
Eugene-Springfield	\$44,763
Oregon	\$53,053

Source: Oregon Employment Department, 2018 Geocoded Quarterly Census of Employment and Wages

In 2018, workers at businesses in rural Lane County earned about \$6,000 less per worker than the county overall (table 6). This figure captures the average wages paid per worker, and thus is not affected by the higher number of rural people who are retired and not in the workforce. This builds on a local wage gap with the state – Lane County as a whole earned nearly \$10,000 less per worker than the state.

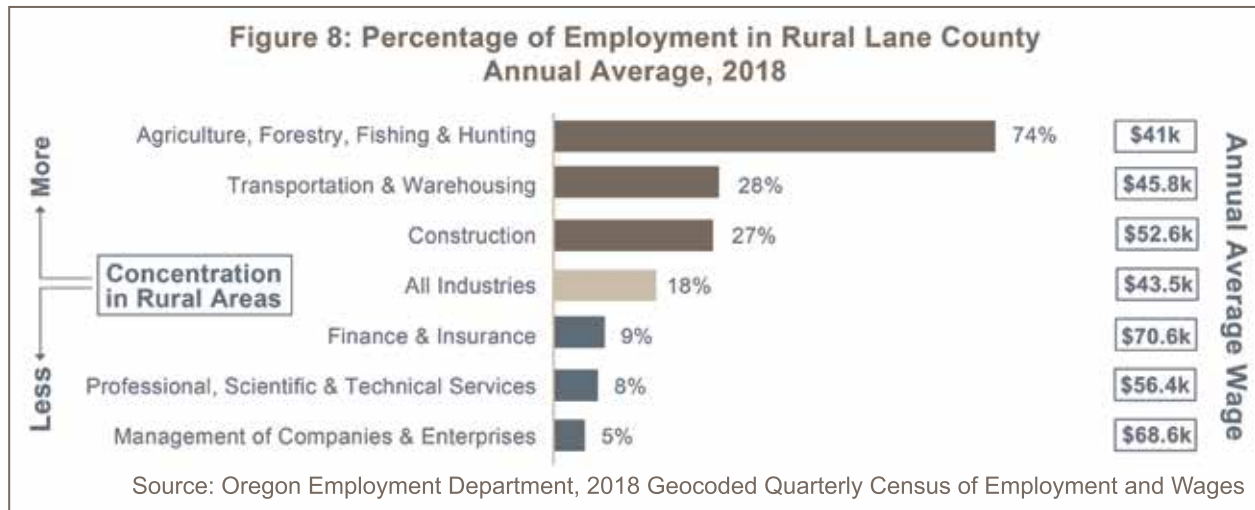
Unemployment has also been unevenly distributed historically (table 7). This data, from the height of the previous expansion, shows that unemployment tends to be lowest in the cities in and near the urban core, whereas further out and isolated cities and towns tend to have more unemployed workers.

The type of work available and concentrated in rural areas is distinct from urban employment, which feeds into some of these disparities.

**Table 7: Unemployment, 2019 Annual Average**

Coburg	3.3%
Eugene	3.8%
Creswell	4.0%
Lane County	4.1%
Springfield	4.4%
Junction City	4.5%
Florence	4.7%
Cottage Grove	4.8%
Veneta	5.9%
Oakridge	6.4%
Lowell	8.8%

Source: Oregon Employment Department, Local Area Unemployment Statistics



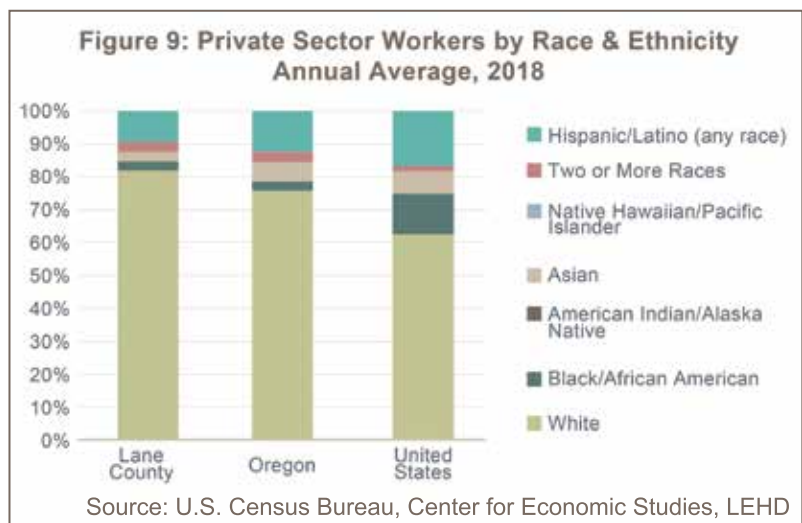
Rural Lane County accounts for 18 percent of the county's total employment, but a much larger share of employment in transportation and warehousing, construction and especially natural resources. Rural areas have much less employment in several of the highest paying industries including finance and insurance, professional service and management (figure 8).

There are some structural reasons for this disparity. Several of these industries require close contact and collaboration with related businesses that cluster in urban areas. However, the need for expansion of broadband access in rural areas combined with the trend toward working remotely could change this dynamic moving into the future. As remote work becomes more common, there is less dependence on living in proximity to urban areas where businesses are located. Future work trends may point toward people working where they live versus needing to live near where they work.

## DIVERSITY, EQUITY & INCLUSION

Like Lane County's overall population, our workforce is less racially diverse than the nation's. A lot of context is needed to understand how our workforce has become this way and in what direction we're headed (figure 9).

Non-Hispanic white workers made up 82 percent of the private sector workforce in Lane County in 2018, compared to 62 percent in the U.S. In contrast with the nation, Lane County has significantly fewer Black or African American and Hispanic or Latino workers. Lane County has a greater share of workers that are American Indian or Alaska Native,



## LANE WORKFORCE PARTNERSHIP

Native Hawaiian or other Pacific Islander, or two or more races than the nation. These groups make up about 1 in 25 workers locally versus about 1 in 50 nationwide.

It's important for local employers, educators and workers to understand that despite the lower diversity overall, our workforce is changing rapidly. Looking at the net change in workers over a 20-year period reveals a more nuanced picture of racial and ethnic entry, exit and change in our workforce. Figure 10 illustrates the percent change in workers of a given race or ethnicity in Lane's workforce from 1999 to 2019.

workers, the percentage of net change by group shows that the workforce has rapidly diversified in recent years.

Beyond overall composition, there are other important considerations with regard to the changing nature of our workforce. Figure 11 (page 19) shows monthly average earnings by racial or ethnic group as well as by sex.

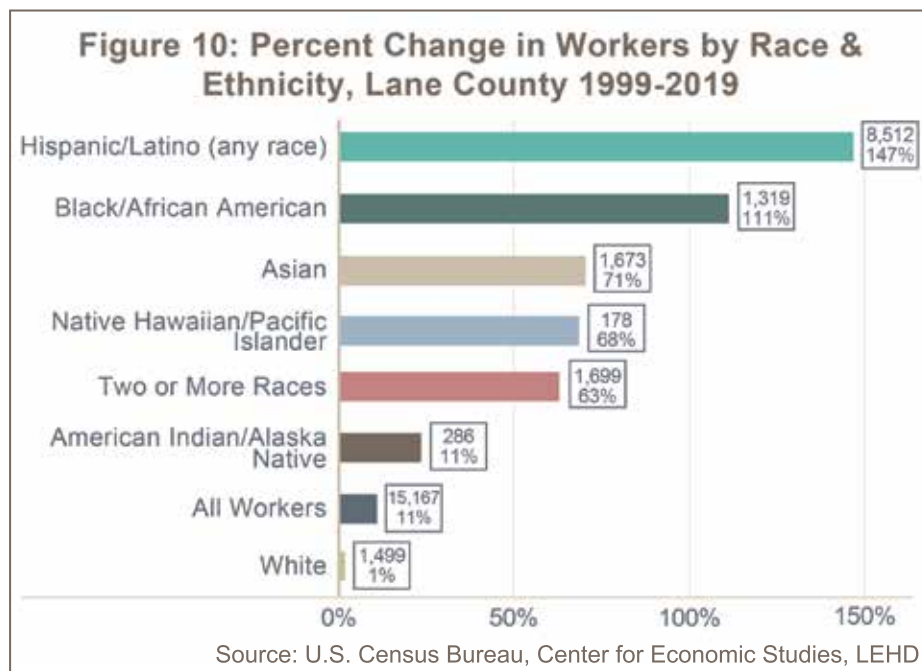
Most racial and ethnic groups earn less than the average, as do women. There are many possible reasons for this disparity, not all of them due to discrimination. For example, most non-white ethnic or racial groups are significantly younger on average than white

workers, and so may not have reached their peak earning years. As another example, women are more likely to work part-time than men, which also affects earnings.

The reasons for this disparity aside, the results have real economic consequence. If every racial and ethnic group earned at least the same amount per worker as the average, it would add up to \$220 million more

in wages to circulate in our economy in 2019. That is as much as was paid out in all private sector jobs in natural resources and mining, educational services and arts, entertainment and recreation – equivalent to more than 6,300 jobs.

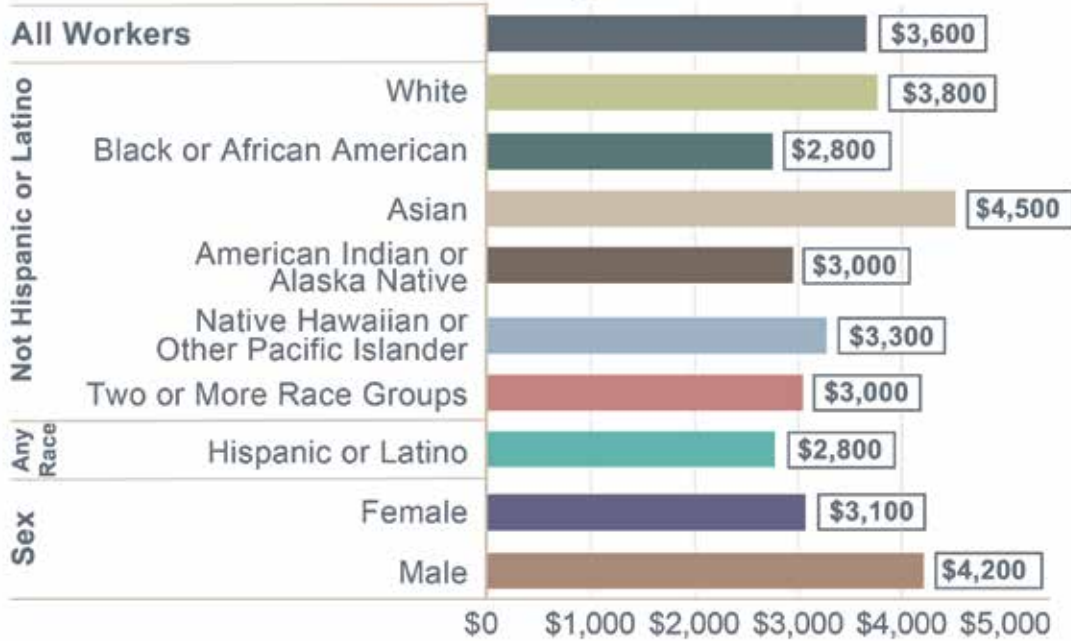
One of the most important elements in understanding the differences in earnings is the composition of particular industries. Not every industry looks equal when it comes to



The numbers represent the net change between demographics at the two points in time and the percent increase that change represents. It shows, for example, that there were 8,512 more Hispanic or Latino workers in our workforce in 2019 than there were in 1999, an increase of nearly 150 percent.

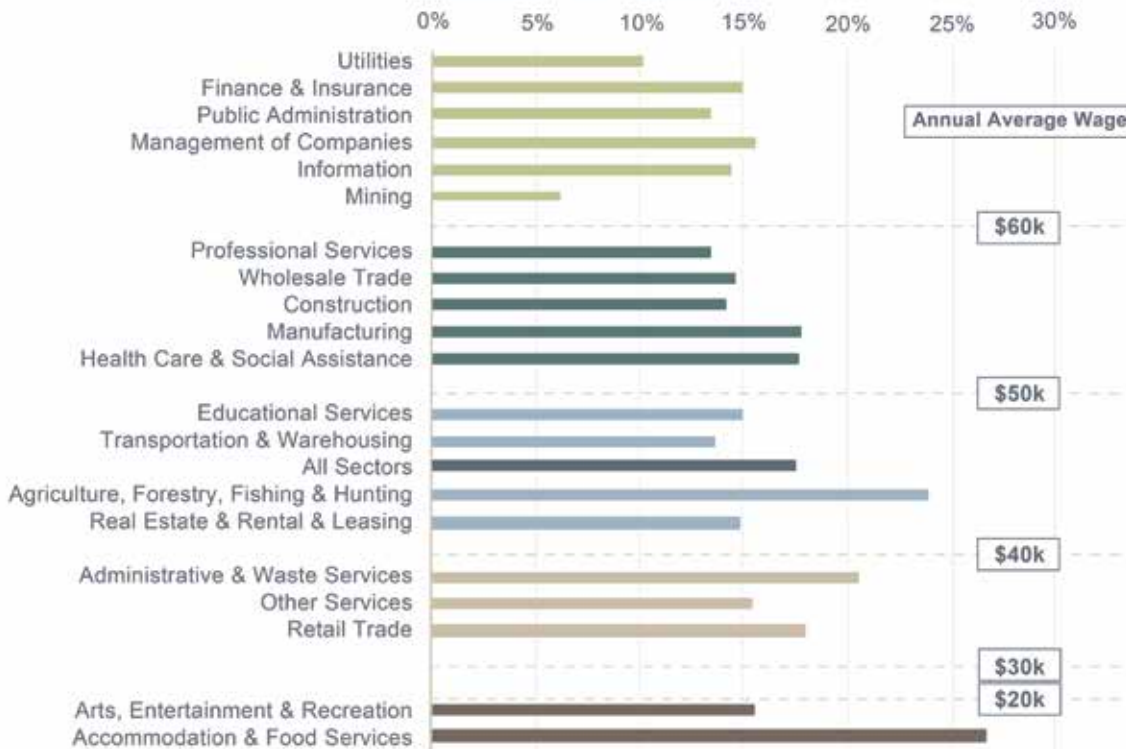
We can easily see that the change in the last several decades has taken an entirely different form from the previous composition of the workforce. While every group has added net

**Figure 11: Average Monthly Earnings  
Lane County, 2019**



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

**Figure 12: Percentage of Workforce Made Up of People of Color  
Lane County 2019 Average**



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

## LANE WORKFORCE PARTNERSHIP

diversity of the workforce, and many of the higher earning industries are less diverse on average. This is certainly a national phenomenon, but we can take a closer look at our local industry mix for insight.

Figure 12 (page 19) shows the percentage of the workforce in each Lane County industry made up of people of color. Some of the highest earning industries on average, such as utilities, public administration and professional services, have a less diverse workforce than average. Conversely, several more diverse industries such as accommodation and food service, retail trade and administrative and waste services earn lower wages than average.

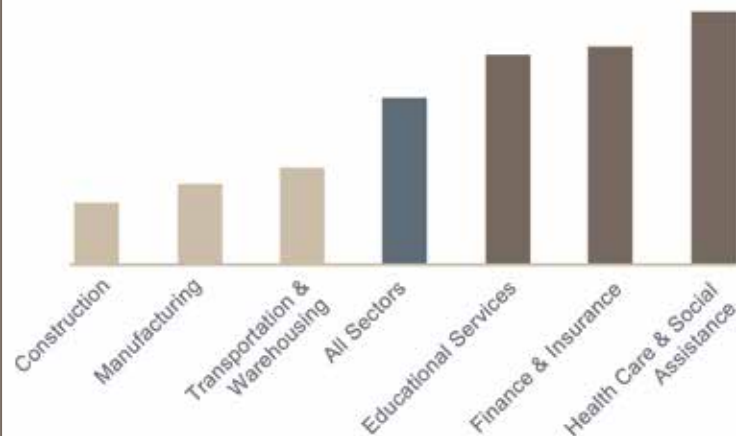
Women are also unequally distributed across the workforce. Although women make up 50 percent of the Lane County workforce, which is a few percentage points higher than the nation, there are far fewer women in some industries and far more in others.

Figure 13 shows the top and bottom three large industries with the greatest percentage of female workers. Construction, manufacturing, transportation and warehousing are all less than 30 percent female. On the other hand, educational services, finance and insurance and health care and social assistance all have a majority female workforce.

Some interesting surprises emerge when we take a closer look at men and women in these industries. There are many roles in finance and health care, for example, that pay well in our area, and it may appear that

having more women in these roles would increase their average wage. However, as with race and ethnicity, the different

**Figure 13: Percentage of Workforce that is Female  
Lane County 2019 Average**



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

occupational mix filled by men and women matters as much or more than industry.

Figure 14 shows average monthly earnings in the top three female-dominated industries, and it's immediately apparent that there's a significant gap in earnings between men and women. Women earn a little more than 50 percent of what men do in finance and insurance, for example.

**Figure 14: Monthly Earnings in Female-Dominated  
Industries, Lane County 2019 Average**



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

## FIGURE 15: EQUITY LENS



Created by the Equity and Inclusion Task Force, Equity Lens adopted by Lane Workforce Partnership board in 2017.

There are a number of reasons for this, but the occupational mix filled by gender is a critical reason. Take health care: [nationally](#), about 40 percent of physicians and surgeons are female, and that number may be even lower at the higher end of the earning spectrum in specialty medicine and surgery. Conversely, some high earning professions, such as pharmacists, are already majority female.

Even more importantly, though, women dominate the broad base of lower-earning jobs in health care and social assistance. Around 90 percent of medical assistants, personal care aides and child care workers are women, all large fields that earn less than the average wage.

### THE CHILD CARE DESERT

#### Affordability

In Oregon, the average annual child care cost for infants is \$11,322 in a day care center and \$6,885 in an in-home child care center. For lower-income workers described in this report whose average annual earnings for a single wage earner is \$31,200 per year before taxes,

little to nothing is left to pay for child care after taxes, housing, utilities and food costs. A sample budget for a single parent of one child in Lane County is shown in table 8 (page 22).

If the child is an infant or toddler, this bare-bones budget results in a monthly deficit. If the parent is hoping to find a slot for their child in a day care center that offers a rich early learning experience, they simply could not afford it; in this scenario, their budget deficit would increase to \$4,712. Further, it is clear that this budget really isn't realistic; it assumes a full-time job earning a higher than minimum wage, and has no provisions for emergency expenses such as car repair or a health care bill. There are also no miscellaneous expenses in this budget, such as new clothes for the child, gifts or activities.

As we examine the need for affordable child care, we are then forced to explore the accessibility of child care.

#### Accessibility and Availability

In Oregon there is only one day care slot for every three children of working parents

**Table 8: Sample Budget of a Lane County Single Parent, One Child Family**

Income/Expense	Amount
Annual Gross Earnings (calculated at \$15 per hour at 40 hours per week – many low wage workers do not get full time hours)	\$31,200
Income Taxes (calculated at the average income tax rate of 14.2%)	(\$4,430)
Rent (calculated at \$900 per month; actual average rent cost in Eugene is \$1,324)	(\$10,800)
Utilities (calculated at low end of \$200 per month for electricity, water, trash, phone, cable)	(\$2,400)
Food & Essentials (calculated at low end of \$500 per month)	(\$6,000)
Transportation (calculated at \$80 per month for gasoline, car maintenance)	(\$960)
Child care (1 child under age 4 in a family-run center)	(\$6,885)
Annual Net	(\$275)

seeking child care. For those able to afford a slot, most child care services are only available during the working hours of Monday–Friday 6:00 or 7:00 a.m. to 6:00 or 7:00 p.m. Evening, night and weekend slots are very difficult to find. For those working parents who do not have the luxury of a Monday–Friday 9:00 a.m. to 5:00 p.m. job, this adds another layer of stress to their lives (and budgets).

Research demonstrates that early education makes a significant difference in lifetime earning potential. But if it is not affordable or available to a large percentage of our population, it creates a deficit with long-term implications to the competitiveness of our country on the world market.

Studies show that high-wage earners create a supply and demand market, which exacerbates the problem and widens the gap. Those that “have” can afford to pay for the limited resource available in the market while the “have nots” are left out. Great programs designed to serve low-income families, like Head Start, are limited and do not meet the community’s full need.

### The Impact

The struggles low-wage workers face in gaining access to jobs that provide a stable work schedule, family-sustaining wages and employer-sponsored benefits have been well documented. These families have also been the hardest hit by COVID-19.

In the United States, the population of white children has been declining while minority



Photo courtesy of Boys & Girls Club of Emerald Valley.





Photo courtesy of Boys & Girls Club of Emerald Valley.

populations are increasing. However, according to the 2010 census, Oregon's population of minority children fell. In his book "Diversity Explosion," William Frey describes that United States' population of children would be steadily declining if not for growth in minority populations. This will soon have a significant impact on America's workforce, as the largest white population in the United States, baby boomers, retires.

The workforce of tomorrow will largely be made up of majority-minority groups. Today's inequitable access to affordable child care will likely have a devastating impact on the country's competitiveness if we are not able to ensure that low-wage working parents are able (and can afford) to place their children in quality child care programs that ensure access to early education programs designed to adequately prepare them for success in K–12 education and beyond.

## THE EDUCATION GAP

Americans have long valued the idea that education is "the great equalizer": Everyone that applies themselves and does well in school can participate in the American Dream.

In reality, higher-income families are able to invest more (time and money) in their children's education than lower-income families, and the result is a huge gap in access to quality educational experiences starting at a very early age.

On average, children in poverty do not succeed as well in school as children from higher income families. The reasons are myriad: government policies, government investments, parenting and race are just a few. Prior to the start of the pandemic in Lane County, the poverty rate had remained stubbornly at 18.1 percent since 2017, and nearly a quarter of local children were living in food-insecure households.<sup>1</sup>

While the achievement gap between white and black students has narrowed over the past few decades, the gap between rich

<sup>1</sup>["Hunger in Lane County 2019."](#) FOOD for Lane County



Photo by [Lina Kivaka](#) from [Pexels](#).

and poor students has grown substantially during the same period. Now, with COVID-19 causing a significant disruption to the education system in the United States, early indicators point to the likelihood of an even greater gap.

COVID-19 has limited children's access to classroom learning experiences for all income levels, but early studies have shown that children from wealthy families are doing better than expected while children from lower-income families are already falling behind. Financially stable families are able to hire tutors, participate in peer learning hubs, pay for private and/or online schools and reduce work hours to ensure that their children are able to continue their education while schools are closed. With a lack of resources, no or limited access to broadband internet and parental inability to take time off without sacrificing basic needs, low-income families are simply being left further behind.<sup>2</sup>

Data from Curriculum Associates, creators of i-Ready digital instruction and assessment software, suggest that only 60 percent of low-income students are regularly logging into online instruction compared to 90 percent of higher-income students. Engagement rates are also lagging in schools serving predominantly Black and Hispanic students, where only 60 to 70 percent are logging in regularly. According to a report published by McKinsey and Company, this lack of engagement may result in low-income and minority students falling behind by as much as one year academically. The long-term economic impacts could be disastrous to the competitiveness of the United States in the world market.

<sup>2</sup>["Education Gap Grows Between Rich and Poor,"](#) Sabrina Tavernise

# Sector-Based Strategies

Sector work is embedded in Lane Workforce Partnership’s (LWP) practices and the use of sector-based approaches to respond to the ever-changing needs of industry and its workforce.

[The Lane County Sector Strategy Team](#) (LCSST) uses the nationally-recognized model of [Next Generation Sector Partnerships](#), which are regional collaborations of businesses — from the same industry and in a shared labor market region — that work with education, workforce development, economic development and community organizations to address workforce and other pressing needs of the target industry.

Sector strategies are business-led partnerships primarily funded by the Workforce Innovation and Opportunity Act (WIOA). These funds provide workforce investments for talent development, job creation and business competitiveness. Local labor market data and analysis is used to inform the work of the board and to identify the regional industries essential to our local economy.

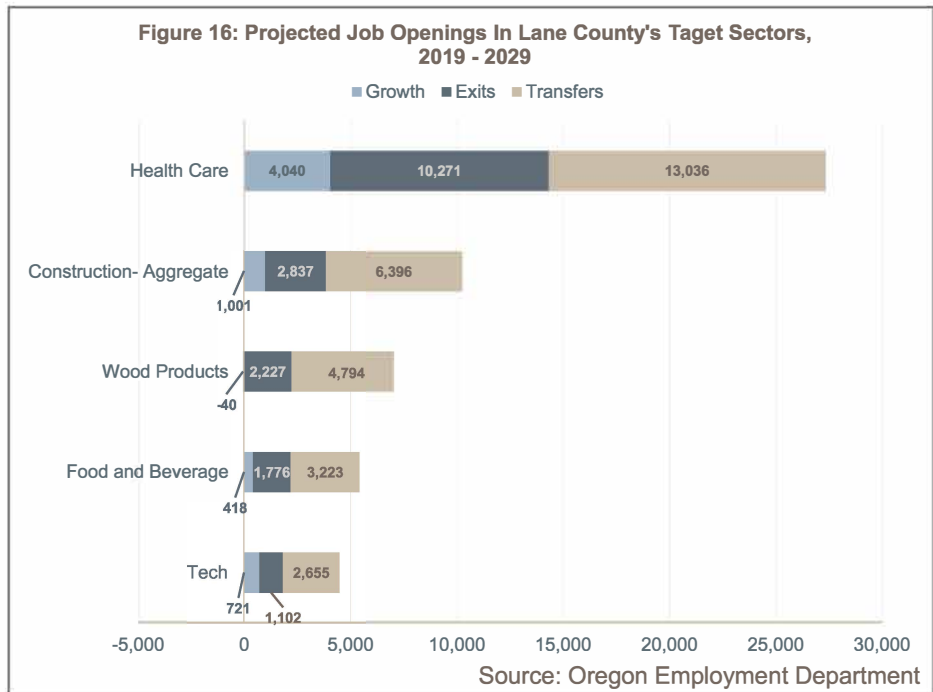
In Lane County the identified industry sectors are: technology, food and beverage manufacturing, construction-aggregate and wood products. LWP is committed to working with business, industry and community partners to solve workforce challenges and other competitive needs.

Tech.....	\$75,272
Food & Beverage.....	\$48,409
Wood Products.....	\$57,724
Construction-Aggregate.....	\$54,926
Health Care.....	\$57,704
Lane County Average.....	\$45,199

Source: Oregon Employment Department

These target industries not only have above average wages for Lane County (table 9) but they also have a large number of forecasted openings (figure 16).

More than 30 percent of Lane County’s high-wage, high-demand jobs in 2019 were in targeted sectors, the largest being health care, construction and technology. These jobs include software developers and other computer occupations, registered nurses, medical assistants, carpenters, electricians and heavy truck drivers.



## TECH SECTOR PARTNERSHIP

- Advocate and drive innovative curriculum in K–12 and higher education.
- Develop programs and initiatives for talent development and retention.
- Increase industry collaboration to make Lane County a top tech hub.
- Create avenues for the tech sector to make localized social impact.
- Engage and support tech and tech-enabled companies throughout the Southern Willamette Valley.

## FOOD AND BEVERAGE SECTOR PARTNERSHIP

- Develop shared resources for local industry to help start-up businesses, keep and grow existing businesses and attract new businesses.
- Advance equitable outcomes for BIPOC-owned (Black, Indigenous and people of color) and other socio-economically disadvantaged businesses.
- Strengthen the region's brand and amplify marketing for local businesses.
- Build a stronger workforce by aligning curriculum at local high schools and colleges and raising awareness of food and beverage careers.
- Advocate for public policy and regulations that supports industry success.
- Increase collaboration across the industry.

## WOOD PRODUCTS PARTNERSHIP

- Advocate for industry priorities, policy and licensing alignment.
- Improve community pride and awareness to move from defending to defining.

- Technical assistance to help with industry pain points.
- Expand student awareness of the wood products industry by coordinating with partners, high schools and higher education.

## CONSTRUCTION-AGGREGATE PARTNERSHIP

- Create industry awareness for younger workers.
- Identify and problem-solve workforce issues.
- Support Career Technical Education (CTE) and expand and promote trade opportunities.
- Discuss how to make connections with K-12, postsecondary and local workforce agencies.

Through sector work, LWP is working to strengthen the local workforce for these industries to ensure businesses have the skilled workforce necessary to innovate and grow, and that workers and job seekers in the county have the skills to take advantage of employment opportunities in these industries.

## LANE COUNTY COMMUNITY COLLABORATIVE

Community partners across the nation are facing increased pressure to more deeply engage industry. The [Lane County Community Collaborative](#) is a group of economic development stakeholders from across Lane County that work to better align efforts and resources to effectively meet the needs of our communities and have a positive ripple effect across our region.

# Tech Sector

Table 10: Lane County Tech Sector Employment Forecast

2019	2029	# Growth	% Growth	Exits	Transfers	Total Openings
3,775	4,496	721	19%	1,102	2,655	4,478

Source: Oregon Employment Department

The tech sector in Lane County includes roughly 462 firms in industries like software publishing, data processing services and electronic manufacturing. Together, these firms employed 3,775 workers in 2019 and contributed almost \$284 million in covered payroll.

Trends show the sector grew after the Great Recession, gaining roughly 520 jobs between 2012 and 2014 from a variety of manufacturing, software and computer service firms. In 2019, the sector lost 32 jobs, largely due to published layoffs at Symantec. However, new and expanding tech firms countered these job losses. The number of new firms in the tech sector grew by 39 between 2018 and 2019.

The tech sector was one of the least affected by COVID-19 restrictions since many of the occupations in the non manufacturing tech industries can be done effectively from home. The sector lost only 2 percent of its employment between February and April of 2020.

At the industry level, tech sector wages are high. In 2019, the average annual wage was \$75,272 compared to \$45,199 for all industries in Lane County.

At the occupational level, the most common occupations in the industry show a combination of highly paid technical occupations and generally lower paid office personnel. Table 11 (page 28) shows the most common occupations in the sector



Photo courtesy of Palo Alto Software.

Table 11: Lane County Employment in the Tech Sector – Most Common Occupations

Occupational Title	2019 Employment	2020 Average Annual Wages
Software Developers, Applications	554	\$85,157
Computer Occupations, All Other	133	\$65,286
General and Operations Managers	125	\$97,115
Computer User Support Specialists	112	\$53,183
Business Operations Specialists, All Other	104	\$58,427
Bookkeeping, Accounting and Auditing Clerks	100	\$40,152
Civil Engineers	99	\$83,417
Social Science Research Assistants	94	\$52,361
Secretaries and Administrative Assistants, Except Legal, Medical and Executive	90	\$39,670
Architects, Except Landscape and Naval	89	\$69,203
Electrical, Electronic and Electromechanical Assemblers	85	\$40,499
Office Clerks, General	84	\$37,305
Architectural and Civil Drafters	81	\$46,470
Sales Representatives, Services, All Other	72	\$55,055
Computer Programmers	71	\$78,485

Source: Oregon Employment Department

with average annual wages. The Oregon Employment Department forecasts show the tech sector will grow by 19 percent in Lane County between 2019 and 2029 (table 10, page 27), compared to 8 percent for all industries. Growth is helped by the addition of several new and expanding firms including electronics manufacturer Stratacache, which will add an additional 721 tech sector jobs. In addition, there are an expected 3,757 openings that will be created through

replacement needs equaling roughly 4,478 total openings or an average of 448 openings per year.

### LOCAL RESPONSES TO TECH WORKFORCE NEEDS:

**Investments:** From 2018–2020, LWP has invested \$63,000 in on-the-job training contracts with local high-tech employers.



### COVID-19 IMPACT: TECHNOLOGY

Palo Alto has maintained headcount throughout 2020. They anticipate that returning to work will come with long-term changes to offer more flexibility and safety for their employees. The economic impacts on their customers directly impacts their bottom line and they are cautiously forecasting for 2021 and focusing on optimizing their teams' remote work effectiveness. — [Technology Association of Oregon](#), Southern Willamette Valley (TAO)

# Food and Beverage Sector

Table 12: Lane County Food and Beverage Sector Employment Forecast

2019	2029	# Growth	% Growth	Exits	Transfers	Total Openings
3,891	4,309	418	11%	1,776	3,223	5,417

Source: Oregon Employment Department

The food and beverage sector is a traded sector that includes both manufacturers and wholesalers. An important growth industry in Lane County, the number of firms grew from 125 to 169 and employment grew from 2,907 to 3,892 between the end of the recession in 2010 and 2019. Craft beer and organic food manufacturers contributed to the growth.

Because the food and beverage sector is made up of jobs in manufacturing and wholesale trade, it was less affected by COVID-19 restrictions than other sectors. When restrictions were enacted between February and April of 2020, nondurable goods manufacturing dropped about 8 percent and the wholesale portion dropped about 5 percent, compared to 15 percent for all industries.

Going forward, the sector is expected to add 418 additional jobs by 2029 for an 11 percent growth rate (table 12), compared to 8 percent for all industries. In addition, there are an expected 4,999 replacement openings equaling 5,417 total openings over the 10-year period.

Wages are higher in the food and beverage sector compared to total average wages in Lane County. In 2019, the Lane County average annual wage in the food and beverage sector was \$48,409 compared to \$45,199 for all industries. High wages in the food and beverage sector are relatively uncommon in Oregon. Statewide, wages in the food and beverage sector are somewhat less than the average for all industries. In Lane County, many firms in the food and



Photo courtesy of Snotemp.

Table 13: Lane County Top Food and Beverage Occupations and Entry Level Education

Occupational Title	2019 Employment	Typical Entry Level Education
Heavy and Tractor-Trailer Truck Drivers	334	Postsecondary training (non-degree)
Sales Representatives, Wholesale and Manufacturing	298	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	260	High school diploma or equivalent
Driver/Sales Workers	224	High school diploma or equivalent
Food Batchmakers	180	High school diploma or equivalent
Stock Clerks and Order Fillers	164	Less than high school
Bakers	157	Less than high school
Waiters and Waitresses	121	Less than high school
Laborers and Freight, Stock and Material Movers, Hand	113	Less than high school
Separating, Filtering, Clarifying, Precipitating and Still Machine Setters, Operators and Tenders	94	High school diploma or equivalent

Source: Oregon Employment Department

beverage manufacturing portion of the sector produce specialized products such as organic food and craft beer as opposed to large food processors, helping to push wages higher.

Table 13 shows that educational requirements for the food and beverage sector are relatively low. Of the 10 largest occupations, nine require a high school diploma or less, yet employers in the industry report having difficulty hiring and keeping workers.

## LOCAL RESPONSES TO FOOD AND BEVERAGE WORKFORCE NEEDS

**Investments:** From 2018–2020, LWP has invested \$66,500 in on-the-job training contracts with local food and beverage employers.



## COVID-19 IMPACT: FOOD & BEVERAGE

The future of bulk bins is uncertain. Wildtime is exploring opportunities to expand direct-to-consumer sales of Grizzlies and preparing for the need to package its products for more traditional grocery sales. Wildtime's ability to pivot quickly to co-packing more products allowed the business to retain all its production staff despite the challenges of COVID-19.

— *Eugene's Table*



# Wood Products Sector

2019	2029	# Growth	% Growth	Exits	Transfers	Total Openings
5,878	5,838	-40	-1%	2,227	4,794	6,982

Source: Oregon Employment Department

Wood products have played a key role in Lane County's economy for generations, and innovative technologies have helped it continue to be an important economic sector today. All aspects of wood products production are part of the Lane County economy including planting, harvesting and manufacturing. When initially tracking this industry sector, LWP focused on the narrow definition of advanced wood products manufacturing, but after extensive conversations with industry leaders we pivoted to expand our definition to capture a broader list of activities in this industry sector. Numbers from the Oregon Forest Resources Institute show that the sector had 7,172 jobs and over \$400 million in total payroll in Lane County in 2017, the most of any county in Oregon.

Wood products manufacturing is by far the most prominent sector within overall manufacturing in Lane County and is more strongly concentrated in our area than almost any other in the country. In 2019, Lane County wood products manufacturing had about eight times more employment concentration than the U.S. and two times more than Oregon statewide.

Although the sector has trended downward since the late 1970s, it had a steady rebound following the Great Recession. Using an industry code definition that captures most of the employment in the wood products sector, it added 476 jobs or about 8.6 percent between 2012 and 2019.

Wood products was one of the industries least affected by the COVID-19 restrictions in



Photo courtesy of Bill Wynkoop, forester with Seneca.

Table 15: Lane County Top Wood Products Growth Occupations

Occupational Title	2019 Employment	Average Annual Wages
Sawing Machine Setters, Operators and Tenders, Wood	441	\$40,372
Industrial Truck and Tractor Operators	367	\$41,737
Machine Feeders and Offbearers	354	\$34,895
Logging Equipment Operators	284	\$55,919
Woodworking Machine Setters, Operators and Tenders, Except Sawing	252	\$41,468
Industrial Machinery Mechanics	247	\$52,933
Inspectors, Testers, Sorters, Samplers and Weighers	226	\$40,110
Extruding, Forming, Pressing and Compacting Machine Setters, Operators and Tenders	219	\$44,151
Cabinetmakers and Bench Carpenters	218	\$37,795
Helpers--Production Workers	211	\$32,921
First-Line Supervisors of Production and Operating Workers	205	\$57,816
Logging Workers, All Other	182	\$47,419
Adhesive Bonding Machine Operators and Tenders	179	\$37,941
Forest and Conservation Workers	130	\$37,445
Mobile Heavy Equipment Mechanics, Except Engines	110	\$53,730

Source: Oregon Employment Department

early 2020. Between February and April when restrictions were enacted, wood products manufacturing lost only 100 jobs (about 3 percent) and regained most of those jobs by June 2020. A loss of about 60 jobs due to COVID-19 restrictions in logging were regained by June.

The Oregon Employment Department forecasts that the sector will decline by 1 percent between 2019 and 2029 (table 14, page 31), losing roughly 40 jobs over the period. However, advancement and retirements are expected to create the need

for 7,021 replacement openings for a total of 6,982 openings over 10 years. Replacement needs will include many higher-paying technical occupations such as industrial machinery mechanics.

Wages are generally high in the wood products sector. The 2019 annual average wage for the sector in Lane County was \$57,724 compared to the overall average of \$45,199 for all industries.

Table 15 shows the top occupations within the wood products sector and their wages in Lane County.



## COVID-19 IMPACT: WOOD PRODUCTS

As the country's top producer of softwood lumber and plywood, Oregon has considered its wood products industry essential during the pandemic. It was important for Seneca, a family-owned business, to show their appreciation and the company began paying the entire cost of health insurance for all 470 of its employees to help give them peace of mind.

— [Oregon Forest Resource Institute \(OFRI\)](#)

# Construction-Aggregate Sector

Table 16: Lane County Construction-Aggregate Sector Employment Forecast

2019	2029	# Growth	% Growth	Exits	Transfers	Total Openings
8,220	9,221	1,001	12%	2,837	6,396	10,234

Source: Oregon Employment Department

\*Contains government employment

Construction and mining are two closely related industries in Lane County that have been combined into a single sector. Almost all mining employment in Lane County is local sand and gravel companies that produce construction aggregate.

The construction-aggregate sector has seen strong growth following losses during the Great Recession. After bottoming out in 2011 at 5,256 jobs, employment has grown by 2,412 positions (46 percent) to reach 7,668 in 2019.

Like most goods-producing industries, the construction-aggregate sector was not as badly affected by COVID-19 restrictions as many of the services industries. While some companies that do remodeling lost business, new home, commercial and heavy construction were able to practice social distancing and continue work.

Construction lost about 6 percent of its jobs between February and April when restrictions were enacted but regained the loss by June and continued its normal seasonal growth into summer. Mining lost about 20 jobs, which were recovered by June.

Construction-aggregate is expected to grow faster than the overall economy at 12 percent between 2019 and 2029, resulting in 1,001 new jobs, compared to 8 percent for all industries (table 16). In addition, there are 9,233 expected replacement openings for a total of 10,234 openings over the 10-year period.

Annual average wages in construction-aggregate are higher than the average for all industries at \$54,926 compared to \$45,199 in 2019. Lane County's total payroll in construction and mining was \$451,489,654, the fourth highest in the state.



Photo courtesy of Hamilton Construction Company.

Table 17: Lane County Top Construction-Aggregate Occupations and Entry Level Education

Occupational Title	2019 Employment	Typical Entry Level Education
Construction Laborers	1011	Less than high school
Carpenters	584	High school diploma or equivalent
Electricians	531	High school diploma or equivalent
Plumbers, Pipefitters and Steamfitters	423	High school diploma or equivalent
Office Clerks, General	342	High school diploma or equivalent
First-Line Supervisors of Construction Trades and Extraction Workers	344	High school diploma or equivalent
Roofers	283	Less than high school
Construction Managers	276	Associate degree
Cement Masons and Concrete Finishers	246	Less than high school
Heavy and Tractor-Trailer Truck Drivers	190	Postsecondary training (non-degree)
Operating Engineers and Other Construction Equipment Operators	198	High school diploma or equivalent
Cost Estimators	218	Bachelor's degree
General and Operations Managers	195	Bachelor's degree
Painters, Construction and Maintenance	206	Less than high school
Heating, Air Conditioning and Refrigeration Mechanics and Installers	157	Postsecondary training (non-degree)

Source: Oregon Employment Department

Even though wages are higher on average than for all industries, most occupations in mining and logging require only a high school diploma or less for the typical entry-level position, providing good paying jobs at lower educational levels (table 17).

The industry faces challenges due to an aging workforce. With 46 percent of its workers over the age of 45, the majority of skilled workers are being lost, and according to local employers, it is difficult to attract younger workers who are more interested in other industries like technology.

## LOCAL RESPONSES TO CONSTRUCTION-AGGREGATE WORKFORCE NEEDS

**Investments:** From 2018–2020, LWP has invested \$147,000 in on-the-job training contracts with local construction-aggregate employers.



## COVID-19 IMPACT: CONSTRUCTION-AGGREGATE

Like most of the Lane County construction-aggregate sector, Hamilton Construction was able to maintain operations during the onset of COVID-19 as an essential/critical industry. In projecting beyond summer 2020, Hamilton Construction has plenty of work from jobs that were in place prior to COVID-19. These jobs will sustain the company through the remainder of 2020, but there is lot of trepidation for work beyond the next 12–18 months.

— [Lane Workforce Partnership](#)

# Health Care Sector

Table 18: Lane County Health Care Sector Employment Forecast

2019	2029	# Growth	% Growth	Exits	Transfers	Total Openings
21,824	25,864	4,040	19%	10,271	13,036	27,346

Source: Oregon Employment Department

\*Contains government employment

Health care is a large and growing sector in Lane County. Lane County is a regional center for health care in Oregon, where patients from outside the county consume services. The county's concentration of health care employment is slightly higher than the nation, and the sector is forecasted to grow at a rate of 19 percent between 2019 and 2029.

The health care sector in Lane County had 1,026 firms that employed 21,824 people in 2019. Payroll in Lane County equaled \$1,259,333,177 in 2019, the third highest in the state.

The sector was the only one that did not drop during the Great Recession and continued to grow afterward, adding 4,012 jobs, or 23 percent, between 2011 and 2019.

Health care has been moderately affected by COVID-19 restrictions. Many nonessential health care providers temporarily closed until medical and dental offices could enact social distancing protocols. The sector lost about 2,000 jobs or 9 percent of employment between February and April of 2020, and had regained about 35 percent of jobs lost by June.

Job opportunities in the health care industry continue to grow, with high-paying jobs spanning the entire educational requirement spectrum. The 2019 annual average wage in health care is \$57,704, compared to \$45,199 for all industries.

Fifty percent of the jobs in the health care industry are in high-wage, high-demand occupations. Among the top high-wage, high-



Photo by Virginia National Guard.

## LANE WORKFORCE PARTNERSHIP

**Table 19: Lane County Top Health Care Growth Occupations**

Occupational Title	2019 Employment	Average Annual Wages
Registered Nurses	2,825	\$94,928
Personal Care Aides	2,142	\$29,099
Nursing Assistants	1,323	\$36,905
Medical Assistants	1,265	\$41,919
Medical Secretaries	1,211	\$39,520
Home Health Aides	680	\$29,099
Substance Abuse, Behavioral Disorder and Mental Health Counselors	522	\$55,889
Dental Assistants	499	\$45,789
Interviewers, Except Eligibility and Loan	467	\$33,007
Receptionists and Information Clerks	423	\$32,463
Physicians and Surgeons, All Other	418	\$260,230
Maids and Housekeeping Cleaners	366	\$29,323
Licensed Practical and Licensed Vocational Nurses	348	\$55,182
Medical and Health Services Managers	332	\$105,569
Orderlies	332	\$35,023*
Billing and Posting Clerks	289	\$41,959
Food Servers, Non-restaurant	285	\$28,398
Cooks, Institution and Cafeteria	283	\$31,110
Physical Therapists	273	\$86,103
Social and Human Service Assistants	241	\$38,483

Source: Oregon Employment Department      \*Statewide wage

demand occupations are registered nurses, medical assistants, dental assistants, physical therapists and assistants, nurse practitioners and radiologic technologists (table 19).

Like most of the sectors on which LWP focuses, health care has an aging workforce. About 45 percent of Lane County workers in health care are 45 years of age and older. There will therefore be more than 23,300 expected replacement openings between 2019 and 2029 (table 18, page 35). When combined with growth openings, there are an expected 27,300 total openings over the 10-year period. In addition to the changes brought about by the Affordable Care Act and state-level initiatives, health care is undergoing dramatic shifts in terms of its workforce needs. There is a greater focus on patient engagement and empowerment,

## LOCAL RESPONSES TO HEALTH CARE WORKFORCE NEEDS

**Investments:** From 2018–2020, LWP has invested \$135,000 in scholarships related to health care careers and an additional \$91,000 in on-the-job training contracts with local health care employers.

health promotion, disease prevention, population health, team-based care among providers and coordinated care across health care organizations. These shifts are changing how care is delivered, resulting in workforce fluctuation. There is a shift to less intensive care, earlier intervention and coordinated care.

# Final Thoughts

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Lane Workforce Partnership brings together partners and resources to anticipate and respond to community workforce needs. We will continue to leverage a collective impact model to mobilize and engage all facets of our community. These efforts only exist and thrive through continued engagement of both the private and public sector. It is with great enthusiasm that we provide this 2020 State of the Workforce report to inform and equip our community stakeholders with the tools and information needed to focus our region's efforts to achieve economic health.

As we look to the future, we know we will face uncertainties and challenges. We also know that our community is only as strong as the many individuals of which it is made. We strive to find ways to elevate our efforts, invest and align resources and be an active partner to help create the future we all want to experience. While the specific needs may change, we always want to ensure that our current and future workforce is strong in numbers and skills, and that our businesses have what they need to sustain and expand



Photo by Rob Sydor, [Eugene, Cascades & Coast.](#)

here. To this end, we will continue to move forward in a collaborative manner with our partners and community to uncover opportunities and strategize solutions. As the African proverb reads, "If you want to go fast, go alone. If you want to go far, go together."



Photo by Melanie Griffin, [Eugene Cascades Coast.](#)

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