

Schroader, Kathy



From: Orjiako, Oliver
Sent: Monday, August 24, 2015 2:30 PM
To: Euler, Gordon; Alvarez, Jose
Cc: Schroader, Kathy
Subject: FW: Clark County Profile

FYI

From: Carol Levanen [mailto:cnldental@yahoo.com]
Sent: Thursday, August 13, 2015 10:20 PM
To: Stewart, Jeanne; Mielke, Tom; Madore, David; Orjiako, Oliver
Subject: Fw: Clark County Profile

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To: Carol Levanen <cnldental@yahoo.com>
Sent: Thursday, August 13, 2015 12:28 PM
Subject: Clark County Profile

Clark County Profile

Labor market profiles of counties in Washington state.

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Clark County Profile

by Scott Bailey, regional labor economist
Updated November 2014



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Overview

Regional context

Clark County is located in southwest Washington on the Columbia River, roughly 100 miles upstream from the Pacific Ocean. It is the fifth most populous county in the state.

Clark County is part of the Portland Metropolitan Area. Its economy can be understood only in that context: one-third of the county's labor force, over 50,000 workers, commutes to Portland on a daily basis, while only 11,000 commute in the opposite direction. The lack of a sales tax in Oregon has led to significant leakage of retail sales, lowering both retail investment and tax revenues for local governments.

Local economy

Clark County, when originally occupied by white settlers, was primarily an agricultural and timber economy. In fact, the first apple tree in the state is still standing there.

The Camas paper mill was started in the 1870s. The cheap power from damming the Columbia helped spur industrialization, including an aluminum smelter built in the late 1930s that closed in 2001 following the Enron energy price manipulation.

In the 1970s, the county began to attract investment in electronics, which became its most important industry in the 1990s and remains so today, despite the loss of one-third of its employment base in the 2001 recession. Wafertech, Hewlett Packard, SEH America and Linear Semiconductor are important employers.

Employment grew rapidly in all sectors during the 1990s, but slowed after the 2001 recession. Construction and homebuilding remained strong until the housing bubble burst. The county lost 6 percent of its employment base in the downturn, worse than the nation and state, but job growth began accelerating in 2013. In 2014, Clark was the fastest-growing county in the state.

Major industry sectors in Clark County include healthcare and social assistance (21,700 jobs in 2013), retail trade (15,800 jobs), leisure and hospitality (13,100 jobs) and manufacturing (12,900 jobs). In addition, government employed 23,700, half of which were in public education.

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Geographic facts

(Source: U.S. Census Bureau QuickFacts)

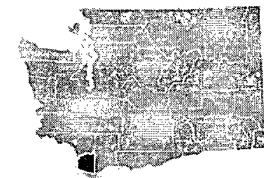
	Clark County	Rank in state
Land area, 2010 (square miles)	629	35
Persons per square mile, 2010	676	2

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Outlook

In 2014, the labor market was steadily improving. Employment growth was extremely strong at 4.5 percent and unemployment was dropping. By the end of the year, it appeared the labor force participation, which had dropped significantly in the 2008 recession, was starting to pick up. It would not be surprising to see these trends extend in 2015, provided that the national and global economies avoid any major snags. The multiplier effect from expansions of traded-sector industries in 2014 will be in play and the relocation and subsequent expansion of the headquarters of Banfield Pet Hospitals will further boost employment. Median household incomes, which dropped in the recession and had shown no upward trend through 2013, should start to pick up. Lower gasoline prices should also help.

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Labor force and unemployment

(Source: Employment Security Department)

Current labor force and unemployment statistics are available on the [Labor area summaries page](#).

Clark County's unemployment rate was below the state and national averages throughout the 1990s, but has been higher than both since 2000. The financial meltdown and subsequent recession widened the gap to four percentage points in 2010. Unemployment was exacerbated by higher than average job losses for Clark County residents working in Portland. The gap dropped to two points in 2013 and in 2014 was a bit over one percentage point.

Unemployment in 2014 has been running two to three points below the same month in 2013. On a seasonally-adjusted basis, the rate was a bit over 7 percent. In contrast with previous years, much of the decline in the unemployment rate could be credited to strong job growth (as opposed to workers dropping out of the labor force). As the year came to an end there was still plenty of slack in the labor market, in the form of working-age residents who dropped out of the labor market and have not re-entered, as well as people working part-time when they desire full-time work.

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Industry employment

(Source: Employment Security Department)

Current industry employment statistics are available on the [Labor area summaries page](#).

Over the past 20 years, Clark County nonfarm employment has grown more than twice as fast as the nation's and much faster than the state's. Pre-recession employment peaked in November 2007. Employment hit bottom in February 2010, when the county had lost 6 percent of its jobs. The recovery was slow going in 2011 and 2012, but job growth began accelerating in mid-2013 and has been red-hot since then.

- **Construction** employment in the county fell by 4,600 jobs (-36 percent) in the downturn. As of September 2014 preliminary figures, 2,100 jobs had been added back in the recovery. Employment has grown by 10 percent in 2014. Construction of new single-family homes was still well below the 1997-2006 average, while multi-family housing was being built at a rapid pace for the second year in a row.
- **Manufacturing** lost 2,600 jobs (-18 percent) and has recovered 1,900 of them. Different segments of manufacturing had radically different outcomes. On the plus side, other nondurable goods—which in Clark County is primarily chemicals/pharmaceuticals but also includes beverages, printing, textiles, apparel and petroleum products—expanded payrolls during the downturn as well as in the recovery, with a total gain of 600 jobs. On the other end, paper products and wood products both shed jobs during the downturn and continued to cut jobs subsequently, with a combined loss of 900 jobs. Electronics, machinery and plastics all suffered job losses in the recession with only a partial recovery, while fabricated metals and other durables (primary metals, electrical equipment, furniture and all others) had small losses followed by larger recoveries and so have been net positive in terms of hiring. In late 2014, manufacturing was growing at about a 2 percent clip.
- **Wholesalers** - who buy from businesses and sell to other businesses ("B2B") - cut 600 jobs on the way down but have added 1,700 jobs on the way up. This important but somewhat invisible sector added more jobs over the past seven years than any industry except health care and accounted for almost one-sixth of net job growth. The preliminary estimate for growth in 2014 was 14 percent.
- Employment in **retail trade** declined by 1,400 jobs (-8 percent) from late 2007 to early 2010, as taxable retail sales dropped by 19 percent from the pre-recession peak. Since then, the industry has completely recovered its employment, adding 1,800 jobs since 2010. Sales, while growing, are still below pre-recession levels. Jobs at grocery stores and general merchandise stores have increased, while other retail segments have greatly pared their payrolls. Retailers have been hiring at a 5 percent growth rate in 2014.
- **Transportation & warehousing** has been one of the few industries that has continued to shrink payrolls during the recovery. This sector lopped off almost 400 jobs during the downturn and almost 200 more since then.
- **Information services** had a modest decline and, looking at the net gain, a modest recovery, ending 2014 with about 200 jobs more than before the recession began. Job losses were actually much deeper, as much of the gain came when Integra moved its headquarters from Portland to Clark County in May 2014.
- **Financial services**, while adding jobs on a net basis, had a lot of disparate sub-currents. Banking shed 400 jobs and recovered only 100 of them. Investment firms have added 200 jobs during the recovery. Insurance has been relatively steady, while real estate had a pronounced decline and comeback. Rental and leasing services have lost half their employment, in part due to the near-disappearance of the once ubiquitous video rental store. Over-the-year growth in late 2014 stood at 4 percent.
- **Professional services** suffered a relatively small downturn while enjoying a robust recovery. Computer systems design was a major part of the story, growing from 900 to 1,400 jobs. Professional services employment was growing at 6 percent in 2014.

- **Corporate offices** was another fast-growing sector, nearly doubling from 1,300 to 2,200 jobs. The relocation of PeaceHealth was a major reason for the increase. The industry has continued to expand in 2014, at +5 percent.
- **Business services** is another sector that had serious job losses, but has bounced back and then some. Temporary staffing services were an early warning sign of the coming maelstrom, with employment plunging by over 1,000 jobs in 2007. They were still 500 jobs short of their 2006 peak. Other business services on balance are 500 jobs above their pre-recession levels. Growth rate as of late 2014: 7 percent over the year.
- **Healthcare and social assistance** added 1,000 jobs during the downturn and 1,000 more more in the recovery. Note that this industry has been redefined, with the addition of home care workers (formerly classified in NAICS 814), many of whom are family members reimbursed by the state for caring for relatives. This sector was growing slightly slower than the overall county average in 2014.
- **Arts, entertainment and recreation services** had a typical profile: falling by 200 workers on the way down, recouping 500 jobs on the way back for a net gain of 300 jobs. Industry payrolls were little change in 2014.
- **Accommodations & food services** lost over 900 jobs in the recession and has gained back all but 100 of them. Growth in 2014 was relatively tame at 2 percent.
- **Government** employment is often a lagging indicator, so it was not a surprise that the public sector continued to add jobs in the first year of the recession. Employment declined slightly in 2009-10 before dropping considerably in 2011 as the decline in state and local tax revenues hit home. Hiring resumed at a low pace in 2013 and accelerated in 2014. Payrolls were up 2 percent in 2014.

For historical industry employment data, [contact an economist](#).

Industry employment by age and gender

(Source: The Local Employment Dynamics)

The Local Employment Dynamics (LED) database, a joint project of state employment departments and the U.S. Census Bureau, matches state employment data with federal administrative data. Among the products is industry employment by age and gender. All workers covered by state unemployment insurance data are included; federal workers and non-covered workers, such as the self-employed, are not. Data are presented by place of work, not place of residence. Some highlights:

In 2013, 14 percent of the jobs in Clark County were held by workers under the age of 25, while 20 percent of jobs were held by those aged 55 and over. The rest of the jobs were evenly split among those aged 25 to 34, 35 to 44 and 45 to 54 with each about 22 percent of the total. The county's worker age profile was slightly younger than that of the state.

Jobs were almost evenly divided between men (48 percent) and women (52 percent). There were substantial differences in gender dominance by industry.

- Male-dominated industries included construction (84 percent), transportation & warehousing (75 percent), manufacturing (73 percent) and wholesale trade (71 percent).
- Female-dominated industries included healthcare and social assistance (81 percent), educational services (public and private combined, 74 percent) and corporate offices (66 percent).

The recession and the recovery had differential affects by age and sex. Comparing late 2007 with late 2013, male employment was down 4.6 percent, while female employment had dropped 1.6 percent. Jobs held by teenagers (aged 14 to 18) declined by 35 percent, those held by 19 to 21 year olds by 15 percent. Jobs in other age groups were either back to par or above the pre-recession level.

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Wages and income

(Source: Employment Security Department; Bureau of Labor Statistics; Bureau of Economic Analysis; U.S. Census Bureau; U.S. Census Bureau, American Community Survey)

The median hourly wage for jobs in Clark County in 2013 was \$20.05, \$2 per hour below the state median. There has been little change in the county median since 2002 when it was an inflation-adjusted \$19.80.

The 2013 average annual wage was \$45,108, well below the state and national averages. The average has risen almost every year for the past two decades. The stagnation of the median wage and increase in the average wage indicates that wages have been increasing on the upper end of the wage scale, but not in the middle and lower segments.

For the 2007-2013 period, the county gained higher-wage jobs and lost lower-wage and middle-wage jobs. Jobs paying below \$16.00 per hour declined by 3 percent, those paying \$16.00 to \$25.99 per hour fell by 2 percent, while those paying \$26.00 per hour or higher increased by 3 percent. The increase in jobs at the upper end came largely in three industries: corporate offices, health care and finance. Middle-wage jobs losses were concentrated in construction and manufacturing, while retail trade and construction accounted for most of the lower-wage job losses.

Not surprisingly, median household income declined sharply in the recession, falling 10 percent from 2007 to 2010 - twice the decline for the state as a whole. The county was above the state

median in 2007, but was below the state in 2010. There was no change in the median (after adjustment for inflation) from 2010 to 2013.

Clark County's poverty rate was 12.4 percent in 2013, according to U.S. Census Bureau. The annual measure of poverty was not statistically different from any year going back to 2007, due to the small sample size for single years. However the three-year average for 2011-13 of 12.4 percent was significantly higher than the average poverty rate for 2008-2010 of 8.7 percent.

Personal income

Personal income includes earned income, investment income, and government payments such as Social Security and Veterans Benefits. Investment income includes income imputed from pension funds and from owning a home. Per capita personal income equals total personal income divided by the resident population.

In 2012, Clark County per capita personal income was \$39,758, well below the state and nation. The county was above the national average in 1997, but has not kept pace and was 9 percent below in 2012.

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Population

(Source: U.S. Census Bureau, Office of Financial Management)

Clark County's population was estimated at 442,800 in 2014. The county was the fastest-growing in the state in the 1990s and was second-fastest over the past decade. Growth was spurred by immigration of new residents, although in 2010, more people moved out of the county than moved in for the first time since 1984. Vancouver is the largest city in the county and the fifth largest in the state, with a population of 167,400.

Population facts

(Source: U.S. Census Bureau QuickFacts)

	Clark County	Washington state
Population estimate for 2014	442,800	6,968,170
Population 2000	345,238	5,894,121
Percent change, 2000 to 2014	28.3%	18.2%

Age, gender and ethnicity

(Source: U.S. Census Bureau QuickFacts)

When compared with the state and nation, Clark County's population has a greater proportion of its population under 5 years old and under 18 years old and a smaller proportion of middle older residents.

The county is much less diverse in terms of race and ethnicity. In 2013, 87.7 percent of Clark's population was white compared with 81.2 percent at the state level and 77.7 percent nationally. Just over 8 percent of Clark County's population is Hispanic or Latino, versus 11.9 percent of the state and 17.1 percent of the nation.

Females in the 2013 Clark County population estimate made up 50.6 percent compared to 50.0 percent for the state.

Demographics

(Source: U.S. Census Bureau QuickFacts)

	Clark County	Washington State
Population by age, 2013		
Under 5 years old	6.5%	6.4%
Under 18 years old	25.6%	22.9%
65 years and older	13.2%	13.6%
Females, 2013	50.6%	50.0%
Race/ethnicity, 2013		
White alone, not Hispanic or Latino	87.7%	81.2%
Black	2.1%	4.0%
American Indian, Alaskan Native	1.1%	1.9%
Asian, Native Hawaiian, Other Pacific Islander	5.3%	8.6%
Hispanic or Latino, any race	8.4%	11.9%

Educational attainment

(Source: U.S. Census Bureau QuickFacts)

In 2013, Most of Clark County residents age 25 and older (91.0 percent) were high school graduates, about the same as the state and a bit higher than the national average. Those with a bachelor's degree or higher made up 26.0 percent of Clark County adults while 31.6 percent at the state level and 28.5 percent nationally have that much education.

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