

The background of the slide features a large, faint, circular seal of the State of Oregon. The seal contains an eagle with wings spread, perched on a shield. Below the eagle is a banner with the text "THE UNION". The outer ring of the seal contains the words "STATE OF OREGON" at the top and "1859" at the bottom. The seal is centered behind the main title text.

Economic Importance of Childcare in Oregon

January 27th, 2020

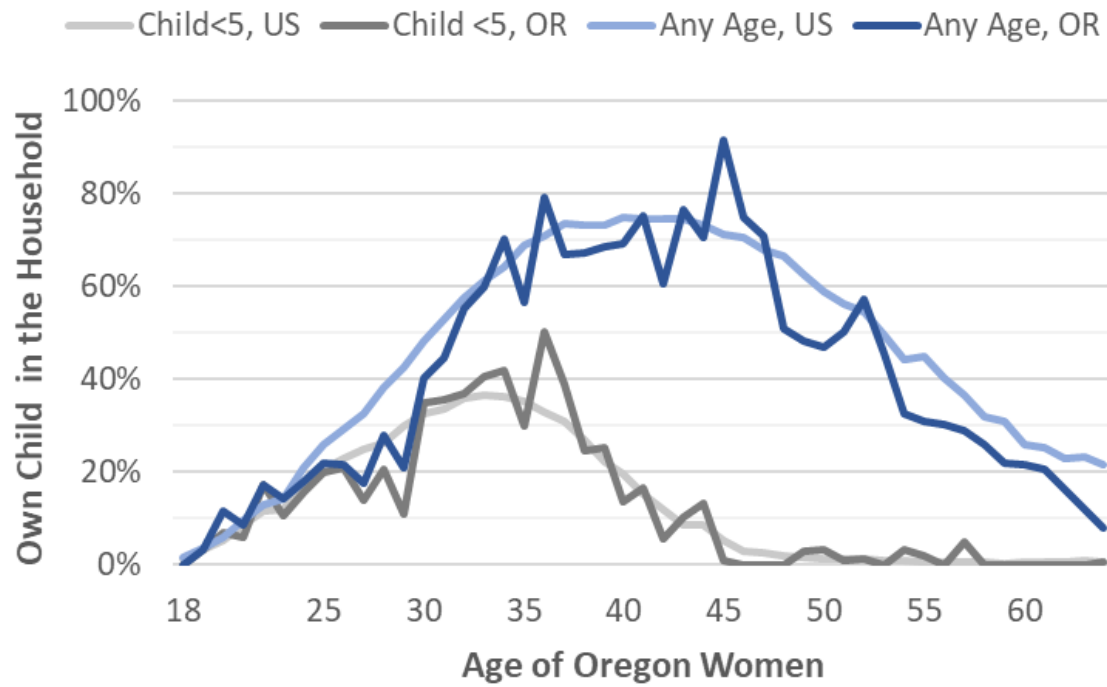
Oregon Office of Economic Analysis
Mark McMullen
Josh Lehner



Moms increasingly important for the Oregon labor market

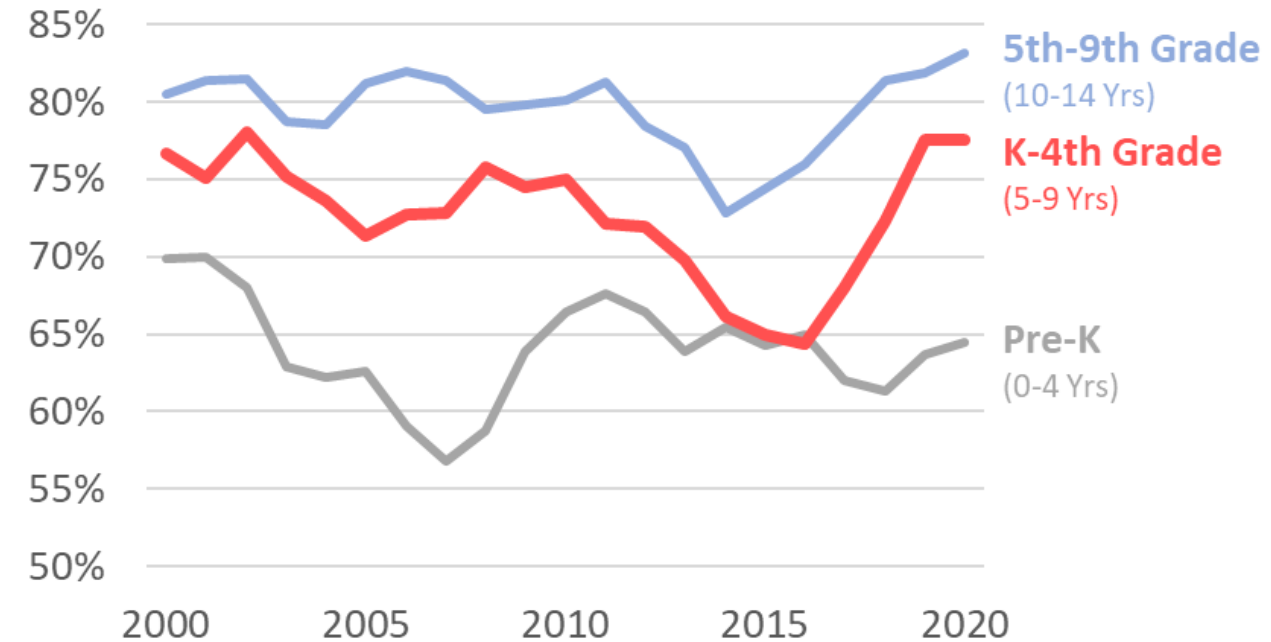
Oregon Moms

Share of Oregon women by age living with their own kid(s)



Oregon Moms Reentering the Labor Force

Labor Force Participation Rate for Mothers by Age of Youngest Child at Home

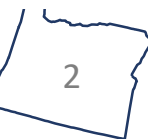


Data: Jan-Nov 2020 Average | Source: IPUMS-CPS, Oregon Office of Economic Analysis

Data: 3 Year Moving Average | Source: IPUMS-CPS, Oregon Office of Economic Analysis



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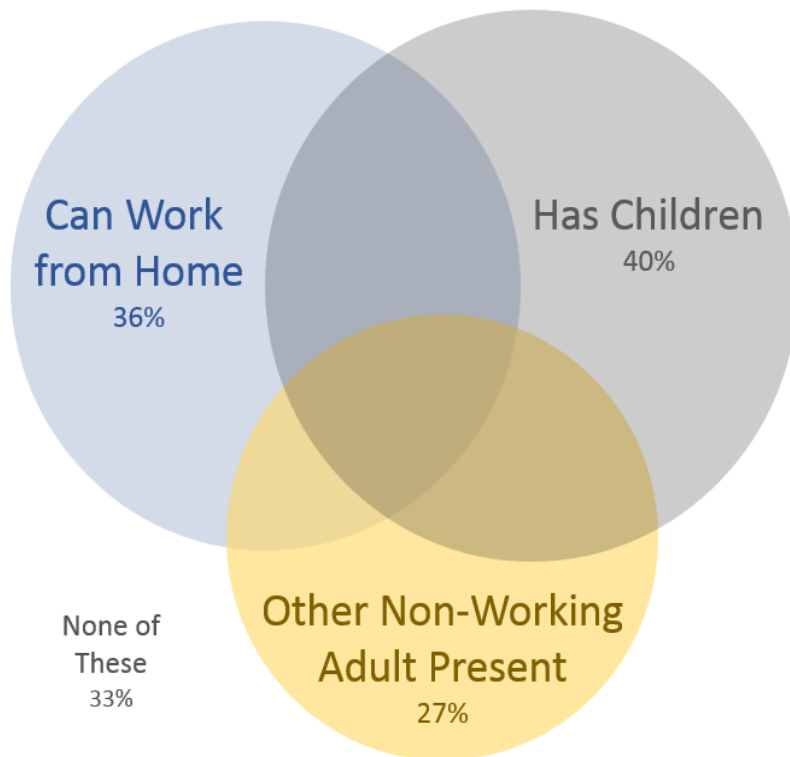




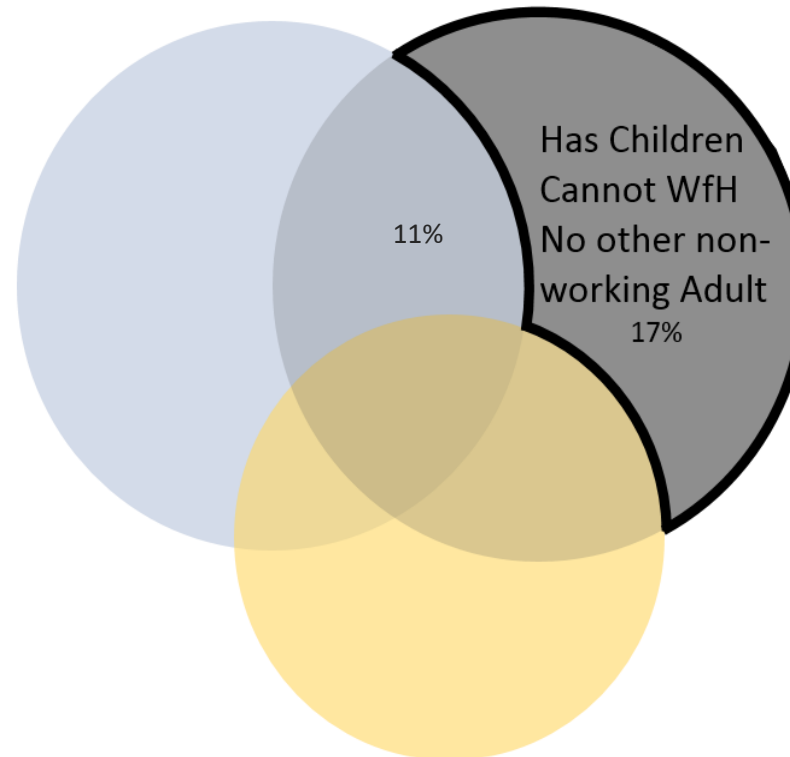
COVID puts parents in a bind

COVID Challenges Working Oregon Parents

Oregon's Workforce: 2.1 million



Working Parents in a Bind: 350,000



- In-person schooling and increased day care operations twofold impact:
 - Direct school district jobs for substitute teachers and support staff
 - Indirect boost to labor supply as parents can work more
- Parents in a bind disproportionately impact middle-income households.
- Low-income households more likely to have a non-working adult present.
- High-income households more likely to be able to work from home.

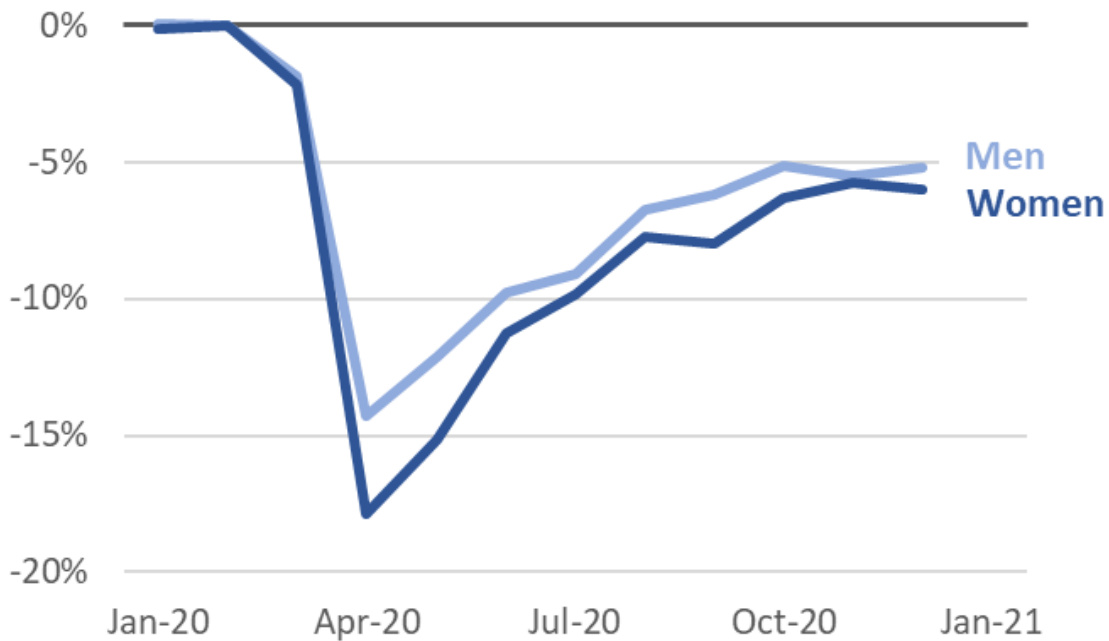




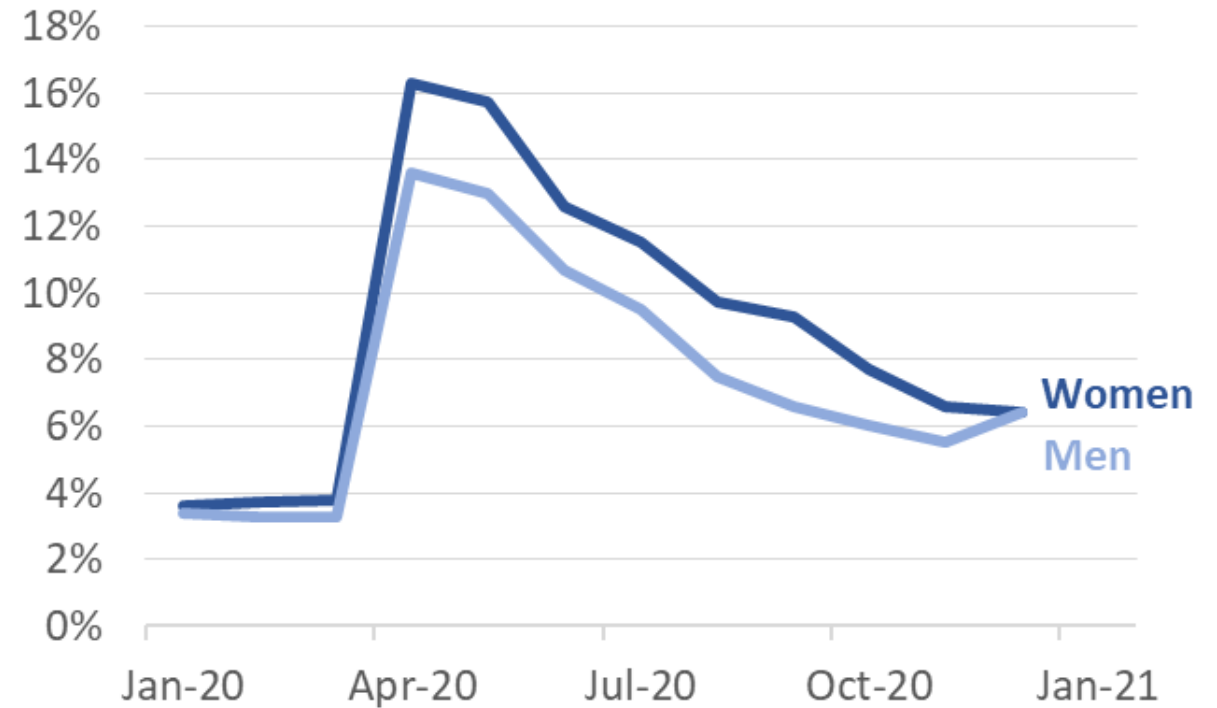
Early returns suggest COVID has hurt women workers a bit more than men

COVID and U.S. Employment

Percent Change from Feb 2020



Unemployment Rate in Oregon



Latest Data: Dec 2020 | Source: BLS, Oregon Office of Economic Analysis

Latest Data: Dec 2020 | Source: Oregon Employment Department, Oregon Office of Economic Analysis



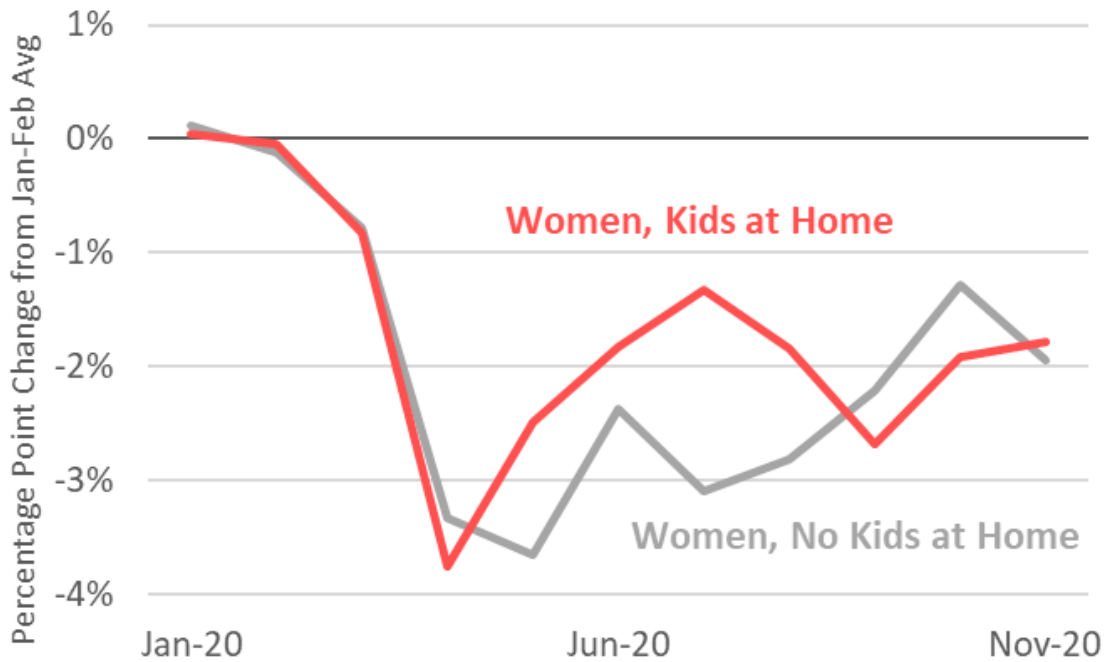
Oregon Office of
Economic Analysis



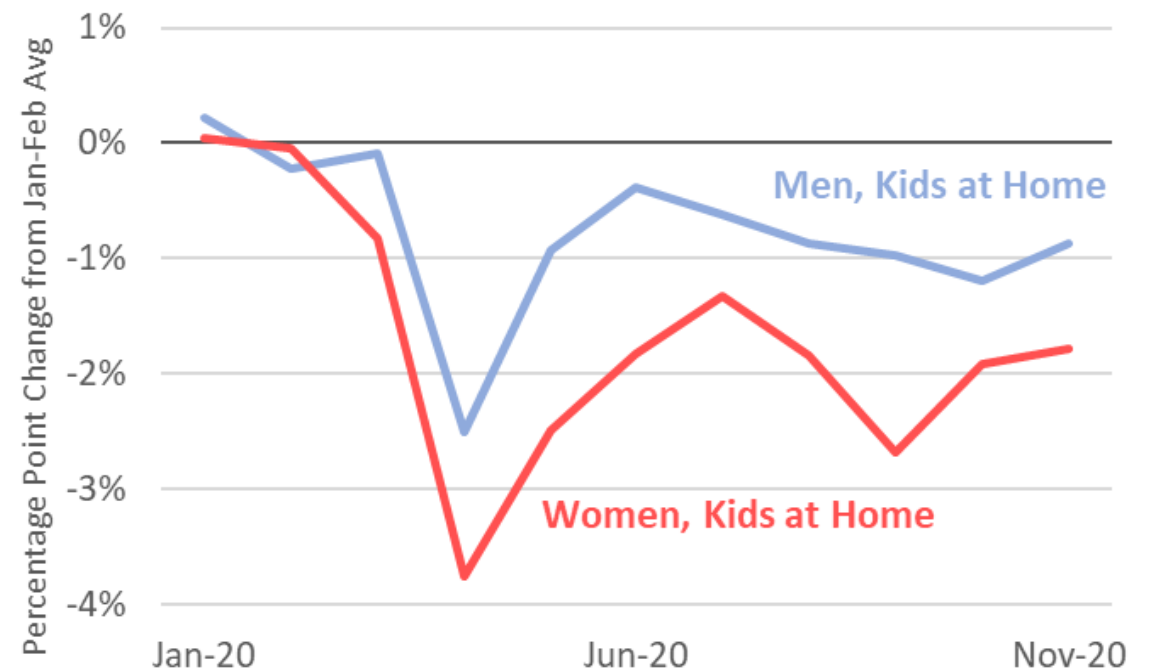


Many women have left the labor market, but childcare is not the only factor

U.S. Change in Labor Force Participation among 25-54 Year Olds



U.S. Change in Labor Force Participation among 25-54 Year Olds



Source: IPUMS-CPS, Oregon Office of Economic Analysis

Data not seasonally adjusted
Oregon Office of
Economic Analysis

Source: IPUMS-CPS, Oregon Office of Economic Analysis

Data not seasonally adjusted





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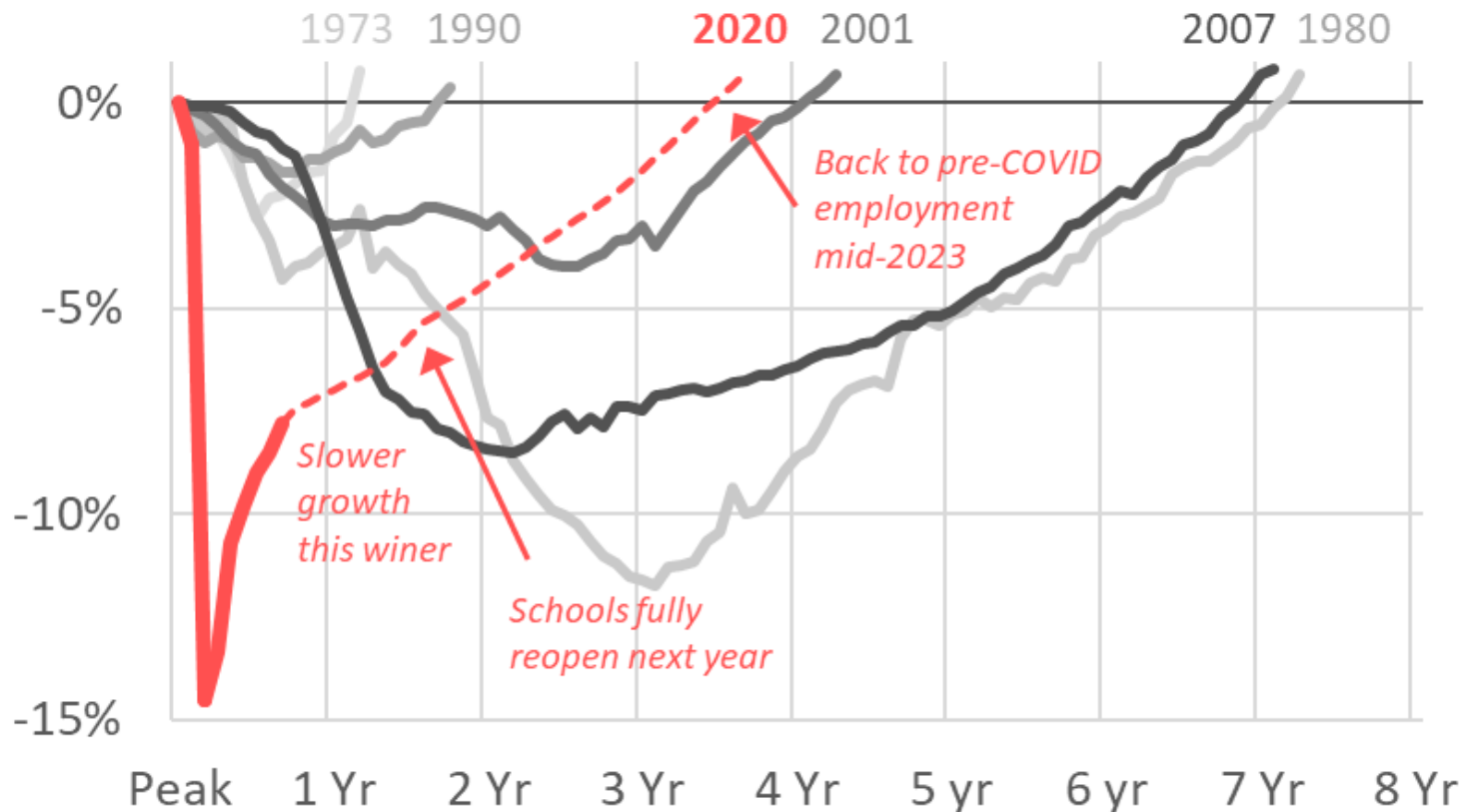




Twofold macroeconomic impact of in-person schooling and opening daycares

Oregon Recession Comparison

Percent Change from Pre-Recession Peak



- Big enough issue to have macro impact and worthy of being called out in our forecast discussion
- Direct jobs impact
 - More teachers hired, especially use of substitutes
 - Vast majority of K-5 teachers are women, 6-12 are evenly split
 - Support staff including nutrition, buses, etc
- Supply boost from freeing parents
 - Return to the workforce
 - Increase hours worked, or at least the productivity of those hours worked



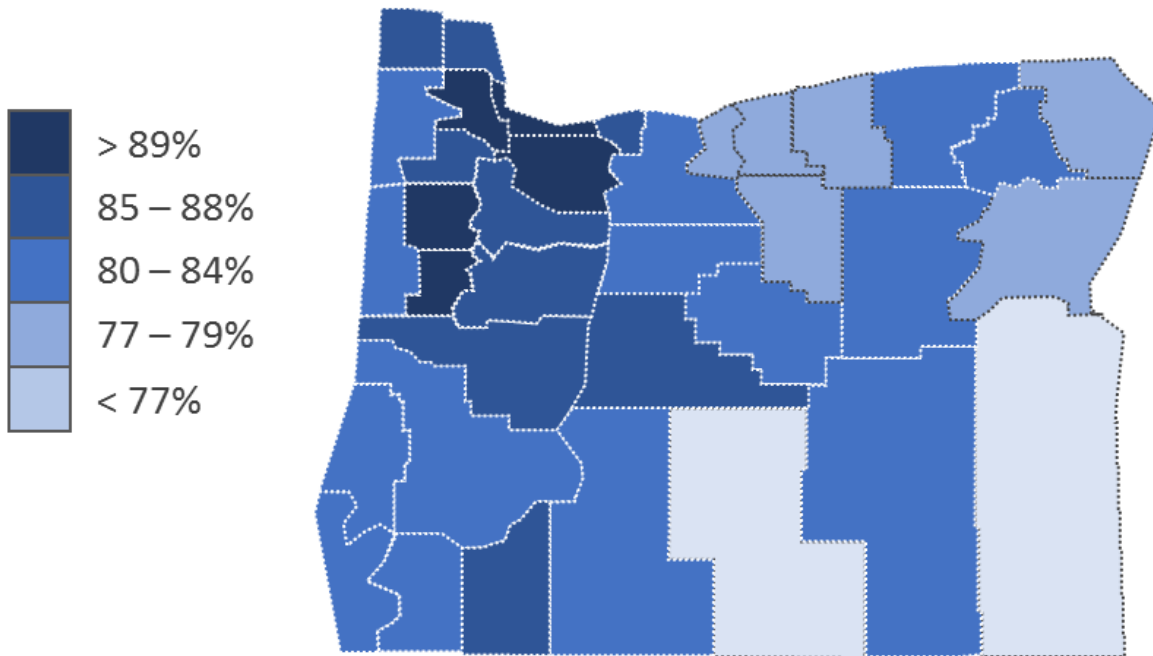


Access to Technology Matters

Oregon Broadband Access

Share of Households with Computer & Broadband Subscription

US: 84% OR: 88%



Data: 2014-2018 American Community Survey
Source: Census, Oregon Office of Economic Analysis

Oregon Broadband Internet



Data: 2018 ACS | Source: Census, Oregon Office of Economic Analysis





Unequal access to education this year

Kids with Internet at Home

Share of Portland area household with children that have a high speed internet connection at home
Race and Ethnicity based on the characteristics of the householder

Household Income	All	White, Non-Hispanic	BIPOC	American Indian or Alaska Native	Asian	Black	Hispanic	Other and 2 or More Races
<\$25k	71%	89%	53%	100%	75%	59%	47%	94%
\$25-50k	74%	83%	61%	74%	62%	63%	58%	59%
\$50-75k	82%	88%	73%	78%	77%	87%	65%	72%
\$75-100k	84%	90%	69%	100%	83%	71%	57%	79%
\$100-150k	91%	91%	90%	100%	90%	100%	85%	87%
>\$150k	97%	97%	98%	100%	97%	100%	100%	96%
Total	87%	92%	77%	91%	87%	75%	66%	80%



Geography: Clackamas, Multnomah, and Washington Counties

Data: 2018 American Community Survey | Source: IPUMS-USA, Oregon Office of Economic Analysis

