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**Administrative  
Offices**

August 28, 2025

Greetings,

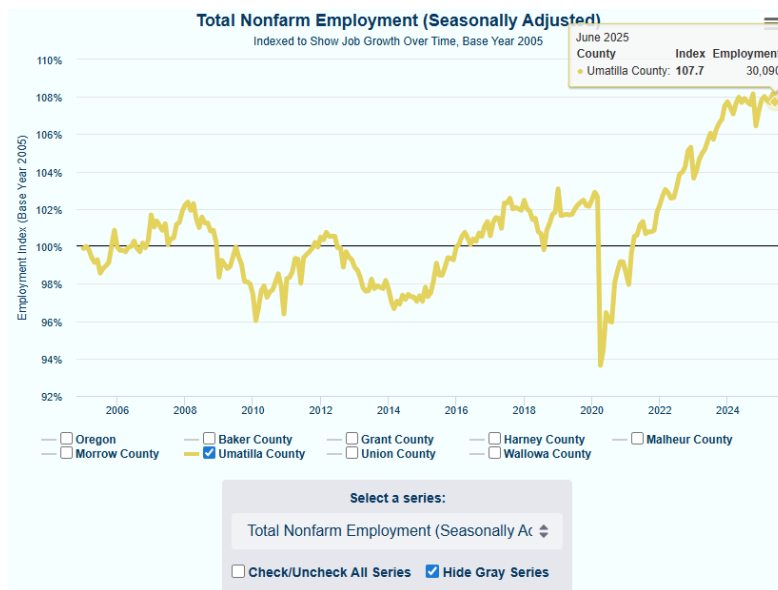
I'm writing today with some noteworthy and, hopefully, illuminating information I hope you will help share with our local/regional partners in the business community. With the economic uncertainty around import taxes (tariffs), relatively high interest rates, unemployment data, and various national talking heads mining for engagement, it is as hard as ever to get your bearings on the local economy.

Aside from national “noise,” it’s also challenging to drill down to get solid data in our immediate area. So I’ve sourced several reliable data sets that give a good snapshot of the local Hermiston/Umatilla/Stanfield/Echo (Greater Hermiston) economy. I hope that these refined data sets will be useful for your members as they develop business cases to take to any of their financial or business partners who may otherwise be inclined to look at county-wide figures and underestimate our area.

Overall, the data show that Umatilla & Morrow counties have been seeing a strong net-gain in jobs over the past 13+ years. Specifically, the “Greater Hermiston” zip codes have accounted for nearly all (91%) of net-gain in jobs within Umatilla County over the most recent decade that we have data for, and accounted for 60% of net-gain in jobs across Umatilla & Morrow Counties combined.

## Umatilla County Job Growth Recently Strong

The first data set we look at is from the Oregon Employment Department<sup>1</sup>, and specifically their measure of Total Non-Farm Employment (seasonally adjusted). This represents actual jobs within Umatilla County, rather than simply the unemployment rate. Although the unemployment rate had declined from the “Great Recession” from 2008 to 2019, the actual number of jobs in Umatilla



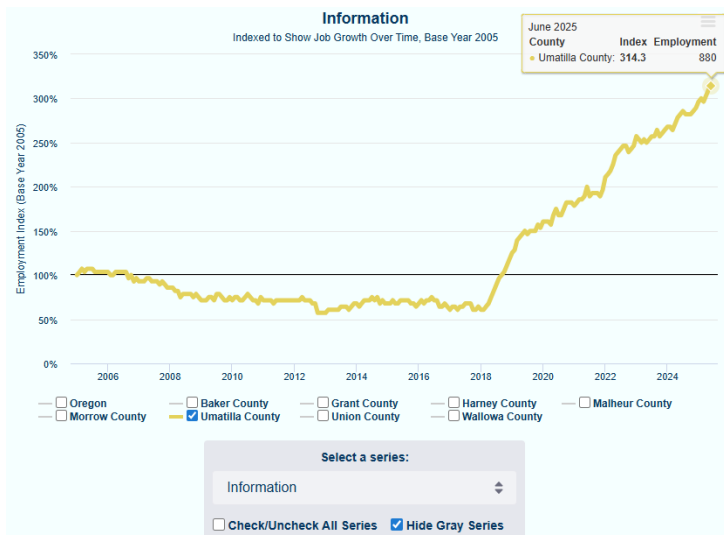
<sup>1</sup> Oregon Employment Department: <https://www.qualityinfo.org/web/guest/eastern-oregon>

County had remained stubbornly stuck around 28,000 total jobs. What we see, however, is, the 2020 “Covid Recession” notwithstanding, Umatilla County began to rapidly add jobs from 2019 through 2024, where it jumped to around 30,000 before flattening off, and appears to be once again down-shifting to neutral around 30,000 for about the past year.

My hunch as to what’s going on ‘under the hood’ has been several-fold, backed up by both anecdotal components and hard data. It appears that private sector employers in the western end of Umatilla County have continued to add jobs while the rest of the county has stagnated or declined.

We then see, beginning in 2019, net employment really begin to rise, roughly in conjunction with the start of significant construction and operation of data centers in western Umatilla County. While the Covid lockdowns created some “noise” in the data in 2020 and 2021, we can see that overall job growth continued through 2022 and 2023, and into 2024 before levelling off. Although we continue to see strong growth in the data center industry, that appears to be getting offset by slowdowns and curtailments in other industries. Particularly, we are seeing slow-downs in food processing and agricultural production in 2025 as the threat of federal tax increases on imports, and reciprocal tax increases on exports, create significant uncertainty for those export-dependent activities. Additionally, Leisure & Hospitality appears to be slowing nationally as well.

We know that the 2019 start to significant Umatilla County job gains coincided with the start of data center operational growth because of the industry data published by the Oregon Employment Department. Data for just the “Information” category of jobs within Umatilla County has historically only included things like newspapers and radio stations, and was a sleepy corner of the county’s employment data, with only 170 jobs in February 2018. That category began an extreme rise to now stand at 880 in June 2025; driven entirely by data center operational jobs, and in spite of continued layoffs in the local newspaper industry. Also very important to note is that jobs associated with construction of data centers are not included in the data for the information category. These are the permanent ongoing operational data center jobs; all of which, we know, are located in the Hermiston/Umatilla zip codes.



*“Information” Sector Mainly includes newspapers, radio stations, and Data Centers.*

## West-End Responsible for Most of Umatilla County's Job Growth

The “real time” data sets that we have available to us are relatively imprecise, in that it is hard to drill down much more deeply than the county-wide level. Unfortunately, since Umatilla County is geographically large, it is hard to precisely say what’s going on in any discreet local job market. For that data, we have to turn to the U.S. Census Bureau, and their “On the Map” tool. Unfortunately, the latest data available there is from 2022, but that also gives strong confidence that the data, although old, is relatively reliable.

| Umatilla County Total Employment                                  |                        |       |       |                  |         |                                 |         |
|-------------------------------------------------------------------|------------------------|-------|-------|------------------|---------|---------------------------------|---------|
|                                                                   | Total All Jobs By Year |       |       | # Change in Jobs |         | % Share of Countywide Job Gains |         |
|                                                                   | 2012                   | 2019  | 2022  | 12-->22          | 19-->22 | 12-->22                         | 19-->22 |
| "Greater Hermiston"                                               | 13949                  | 15758 | 16879 | 2930             | 1121    | 91%                             | 114%    |
| Pendleton (97801)                                                 | 10310                  | 10868 | 10794 | 484              | -74     | 15%                             | -8%     |
| Milton Freewater (97862)                                          | 3373                   | 2825  | 2777  | -596             | -48     | -19%                            | -5%     |
|                                                                   |                        |       |       |                  | 0       | 0%                              | 0%      |
| Weston (97886)                                                    | 0                      | 501   | 477   | 477              | -24     | 15%                             | -2%     |
|                                                                   |                        |       |       |                  | 0       | 0%                              | 0%      |
|                                                                   |                        |       |       |                  | 0       | 0%                              | 0%      |
| Pilot Rock (97868)                                                | 263                    | 298   | 259   | -4               | -39     | 0%                              | -4%     |
| Athena (97813)                                                    | 248                    | 221   | 249   | 1                | 28      | 0%                              | 3%      |
| Adams (97810)                                                     | 115                    | 99    | 106   | -9               | 7       | 0%                              | 1%      |
| All Others Combined)                                              | 195                    | 119   | 130   | -65              | 11      | -2%                             | 1%      |
| Total                                                             | 28453                  | 30689 | 31671 | 3218             | 982     | 100%                            | 100%    |
| Source: U.S. Census Bureau: On the Map                            |                        |       |       |                  |         |                                 |         |
| "Greater Hermiston" = Hermiston/Umatilla/Stanfield/Echo Zip Codes |                        |       |       |                  |         |                                 |         |

When we look into the zip-code level data, we see some very clear trends that support the assumptions outlined above that Hermiston, Umatilla, Stanfield and Echo are responsible for nearly all net job growth in Umatilla County from 2012 through 2022. We can see that the Hermiston zip code alone added a net gain of 2,200 jobs, while Umatilla County as a whole added 3,200; meaning that roughly two out of every three net new jobs in Umatilla County over that time were in Hermiston. We also see that the Umatilla zip code accounted for the next largest net gain in total employment, with 666 of those 3,200 county-wide. When we add together the Hermiston/Umatilla/Stanfield/Echo zip codes, we see that they are collectively responsible for 91% of the net employment gains in Umatilla County. In other words, for every 10 jobs gained in Umatilla County from 2012 through 2022, 9 of those were located in the west end.

Looking at the data just from 2019 to 2022 may give a little more insight into what’s going on in this dynamic, because we get some strange numbers. In that time, the combined Hermiston/Umatilla/Stanfield/Echo zip codes added 1,100 jobs, while the county as a whole only added 982 jobs. This means that the west end accounted

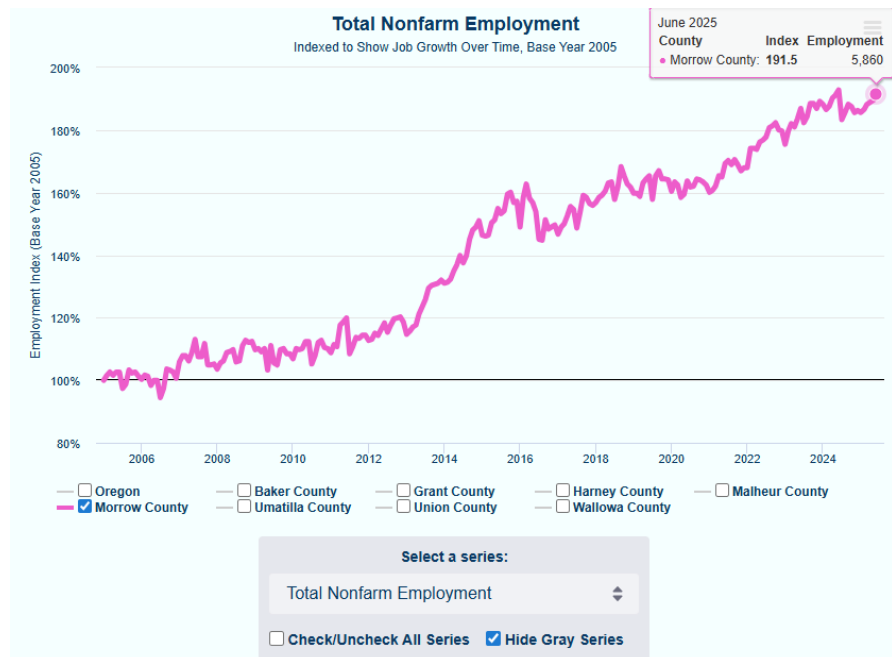
for 114% of the net job growth in the three-year span. In other words, the rest of Umatilla County saw a net loss of 130 jobs.

Due to the havoc created by the extreme conditions of Covid lockdowns on the hospitality industry, and the significantly higher reliance on hospitality jobs in the Pendleton area associated with Wildhorse Resort & Casino, it is likely the data still has a certain amount of drag included from the early months of 2022. So while I'm hopeful that the 2023 data will show a return to net-positive job growth for the rest of Umatilla County, for our purposes, the data we do have available can simply be used to show that our assumptions of strong job growth in the Greater Hermiston area appear to be valid even if it can be muddled by the lack of hyper-local data within Umatilla County on a more recent timescale.

### **"Greater Hermiston" Leads Morrow/Umatilla Counties**

It is common for people to see large developments in Morrow County and talk about, "all those jobs in Morrow County." They then look at me askance when I point out that the Hermiston/Umatilla/Stanfield/Echo area is still adding more jobs than Morrow County is. This mainly seems to be associated with the fact that while there is a handful of really large growing employers in Boardman, the northern Morrow County economy is still relatively 'thin' and less diverse than the Greater Hermiston area, which has a much larger and deeper base of employers adding jobs.

In looking at the more instantaneous data from the state employment department, we can see that Morrow County as a whole has experienced a very similar trend as Umatilla County, in that it also added a net-gain of ~2,000 jobs from 2012 to 2024; growing from 3,500 in 2012 to 5,800 in June 2024. We can also see that Morrow County has experienced the same flat-lining of job growth over the past year; holding roughly steady at 5,800 jobs in June 2025.



When looking at the slower data from the U.S. Census Bureau that allows us to drill into

more detail at the zip code level, we see some realities which may not otherwise be evident to your typical observer. The table below shows that although the “Greater Boardman” area added a significant number of jobs from 2012 to 2022, that growth of 1,489 jobs was only about half as much job growth as seen in the “Greater Hermiston” area, which added 2,930 over the same period.

The U.S. Census Bureau classifies Umatilla and Morrow County together as the “Hermiston-Pendleton Micropolitan Statistical Area” due to the counties’ shared economy. Combining the two counties, and considering the Hermiston/Umatilla/Stanfield/Echo zip codes to be “Greater Hermiston” and Boardman/Irrigon zip codes to be “Greater Boardman,” we see that Greater Hermiston and Greater Boardman combined to account for 4,419 out of the 4,870 net gained jobs in the MSA from 2012 to 2022.

| <b>Umatilla &amp; Morrow County Combined Total Employment</b>            |                               |       |       |  |                         |         |                                 |         |
|--------------------------------------------------------------------------|-------------------------------|-------|-------|--|-------------------------|---------|---------------------------------|---------|
| <i>Hermiston-Pendleton Micropolitan Statistical Area</i>                 |                               |       |       |  |                         |         |                                 |         |
|                                                                          | <b>Total All Jobs By Year</b> |       |       |  | <b># Change in Jobs</b> |         | <b>% Share of MSA Job Gains</b> |         |
|                                                                          | 2012                          | 2019  | 2022  |  | 12-->22                 | 19-->22 | 12-->22                         | 19-->22 |
| "Greater Hermiston"                                                      | 13949                         | 15758 | 16879 |  | 2930                    | 1121    | 60%                             | 87%     |
| Pendleton (97801)                                                        | 10310                         | 10868 | 10794 |  | 484                     | -74     | 10%                             | -6%     |
| "Greater Boardman"                                                       | 3090                          | 4225  | 4579  |  | 1489                    | 354     | 31%                             | 28%     |
| Milton-Freewater (97862)                                                 | 3373                          | 2825  | 2777  |  | -596                    | -48     | -12%                            | -4%     |
| Heppner (97836)                                                          | 704                           | 865   | 840   |  | 136                     | -25     | 3%                              | -2%     |
| Weston (97886)                                                           | 0                             | 501   | 477   |  | 477                     | -24     | 10%                             | -2%     |
| Pilot Rock (97868)                                                       | 263                           | 298   | 259   |  | -4                      | -39     | 0%                              | -3%     |
| Athena (97813)                                                           | 248                           | 221   | 249   |  | 1                       | 28      | 0%                              | 2%      |
| Ione (97843)                                                             | 203                           | 207   | 204   |  | 1                       | -3      | 0%                              | 0%      |
| Lexington (97839)                                                        | 71                            | 100   | 122   |  | 51                      | 22      | 1%                              | 2%      |
| All Others (Combined)                                                    | 260                           | 186   | 161   |  | -99                     | -25     | -2%                             | -2%     |
|                                                                          | 32471                         | 36054 | 37341 |  | 4870                    | 1287    | 100%                            | 100%    |
| <i>Source: U.S. Census Bureau: On the Map</i>                            |                               |       |       |  |                         |         |                                 |         |
| <i>"Greater Hermiston" = Hermiston/Umatilla/Stanfield/Echo Zip Codes</i> |                               |       |       |  |                         |         |                                 |         |
| <i>"Greater Boardman" = Boardman/Irrigon Zip Codes</i>                   |                               |       |       |  |                         |         |                                 |         |

In closing, I think this jobs data gives you a solid look at Umatilla and Morrow counties’ fundamental economic conditions, and specifically the Greater Hermiston area’s relative and impressive growth. As you get questions from any of your members anxious about the economy because they’ve been watching too much cable news and doom-scrolling social media, you should feel comfortable showing them the real solid numbers that our area truly continues to grow and add jobs which in turn leads to more customers and demand for all of us.

The City of Hermiston will be sharing some of this information in a news release and I

would be happy to come speak to your members or provide a slide deck with this information if it would be of use.

Sincerely,

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