

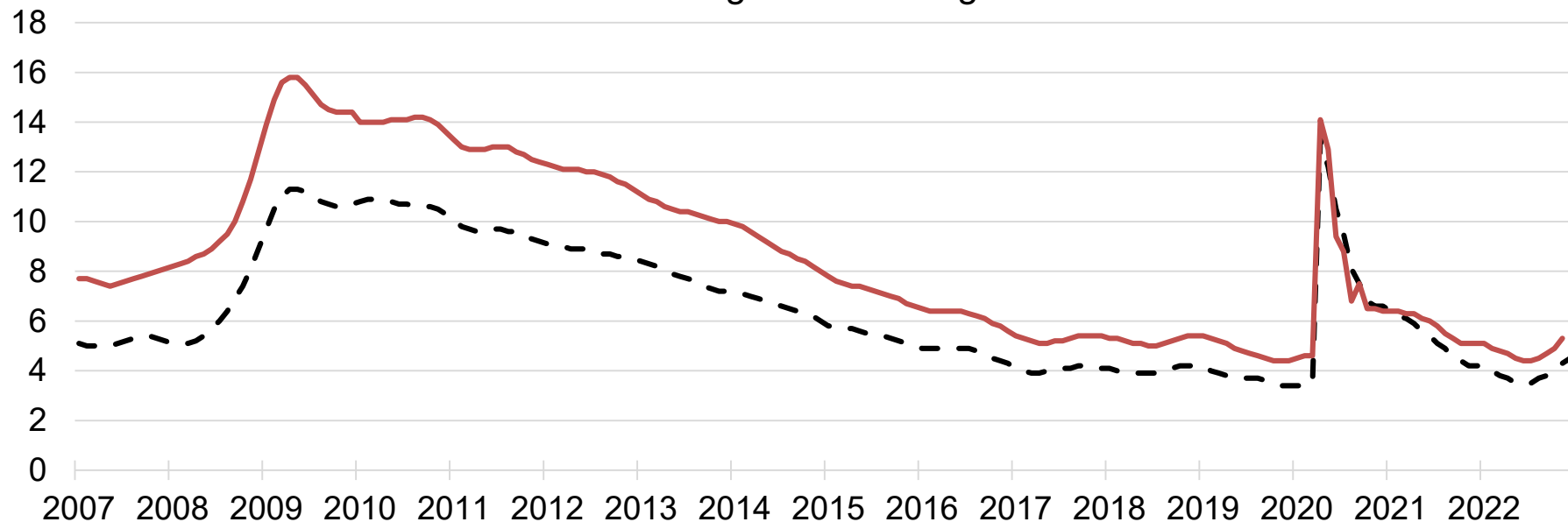
The State of Recovery



Unemployment has edged up but remains near record lows

Seasonally Adjusted Unemployment Rate

-- Oregon — Douglas

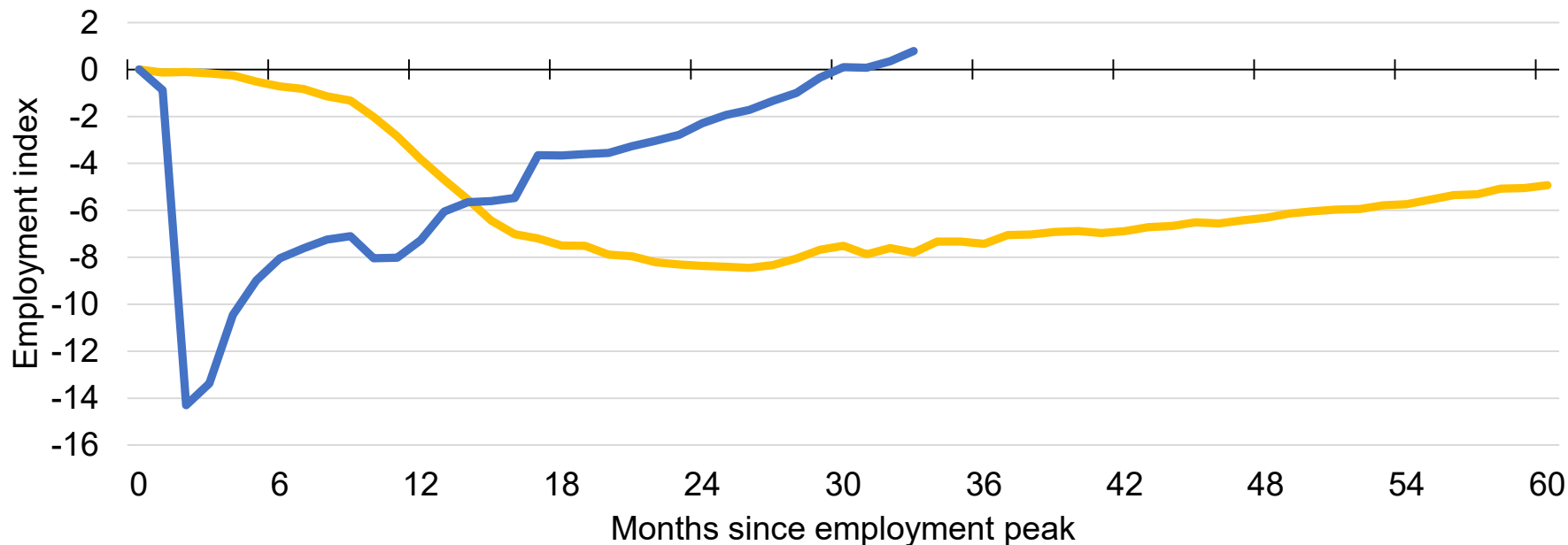


Source: Oregon Employment Department, Local Area Unemployment Statistics

Overall recovery is fast by historical standards

Oregon Job Change

— Great Recession — COVID

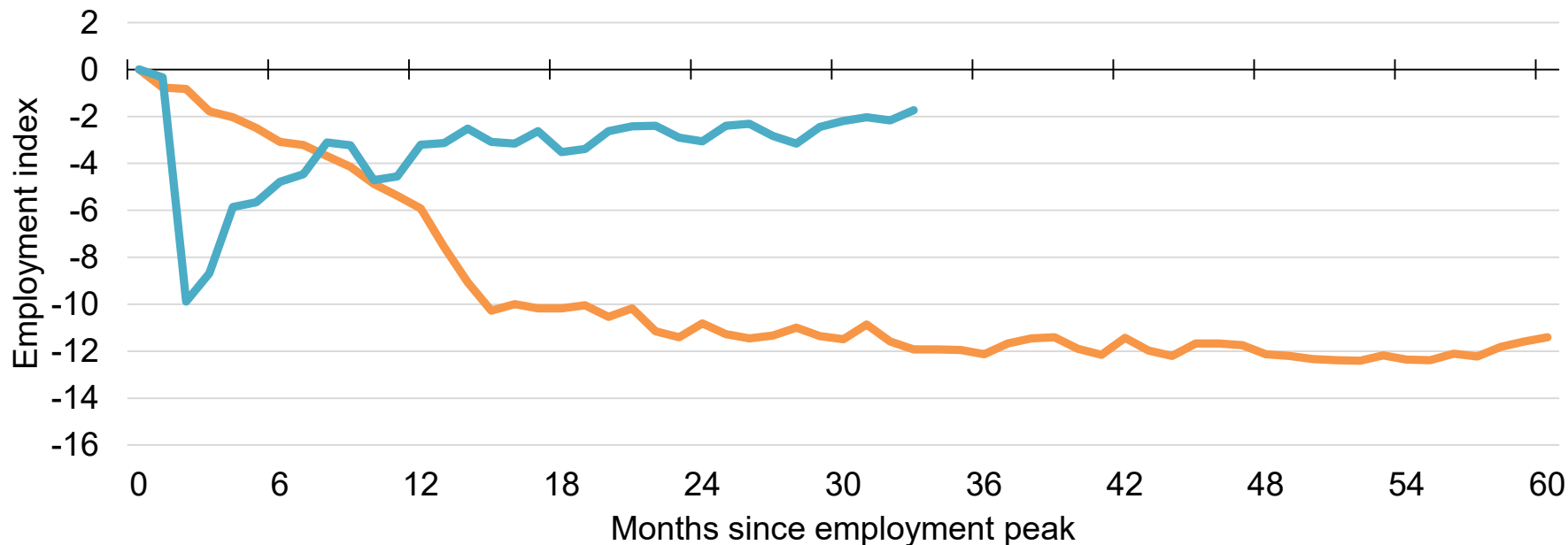


Source: Oregon Employment Department, Current Employment Statistics

Douglas had a comparatively harder Great Recession and easier 2020

Douglas Job Change

— Great Recession — COVID



Source: Oregon Employment Department, Current Employment Statistics

Recovery by industry has varied widely

Douglas County Employment by Industry

Industry	Nov. 2019	Nov. 2022	Net Change	Pct. Change
Wholesale trade	770	960	190	25%
Indian tribal	1,080	1,120	40	4%
Leisure & hospitality	3,530	3,620	90	3%
Education & health services	6,300	6,450	150	2%
Transportation, warehousing, & utilities	1,630	1,640	10	1%
Retail trade	4,940	4,970	30	1%
Information	280	280		0%
State government	730	730		0%
Local government exc. educ. & tribal	1,460	1,450	-10	-1%
Total nonfarm employment	39,340	38,720	-620	-2%
Federal government	1,470	1,440	-30	-2%
Manufacturing	4,770	4,630	-140	-3%
Other services	1,320	1,280	-40	-3%
Construction	1,830	1,770	-60	-3%
Mining & logging	1,020	960	-60	-6%
Local education	3,170	2,940	-230	-7%
Financial activities	1,460	1,350	-110	-8%
Professional & business services	3,580	3,130	-450	-13%

Bright spots:

- Wholesale
- Leisure and hospitality above 2019 peak
- Health care

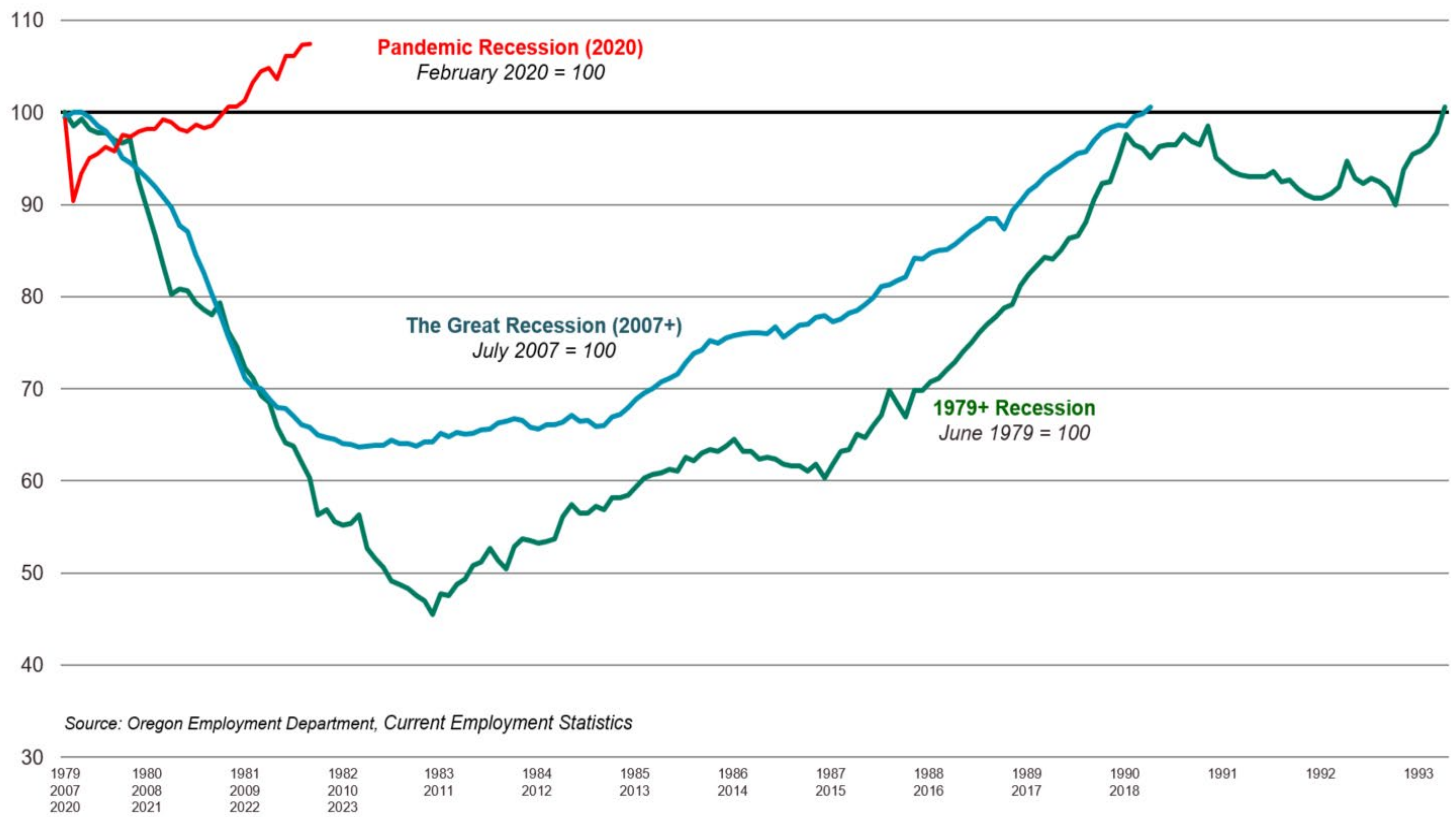
Challenges:

- Professional and business services
- Financial activities
- Local education

Source: Oregon Employment Department, Current Employment Statistics

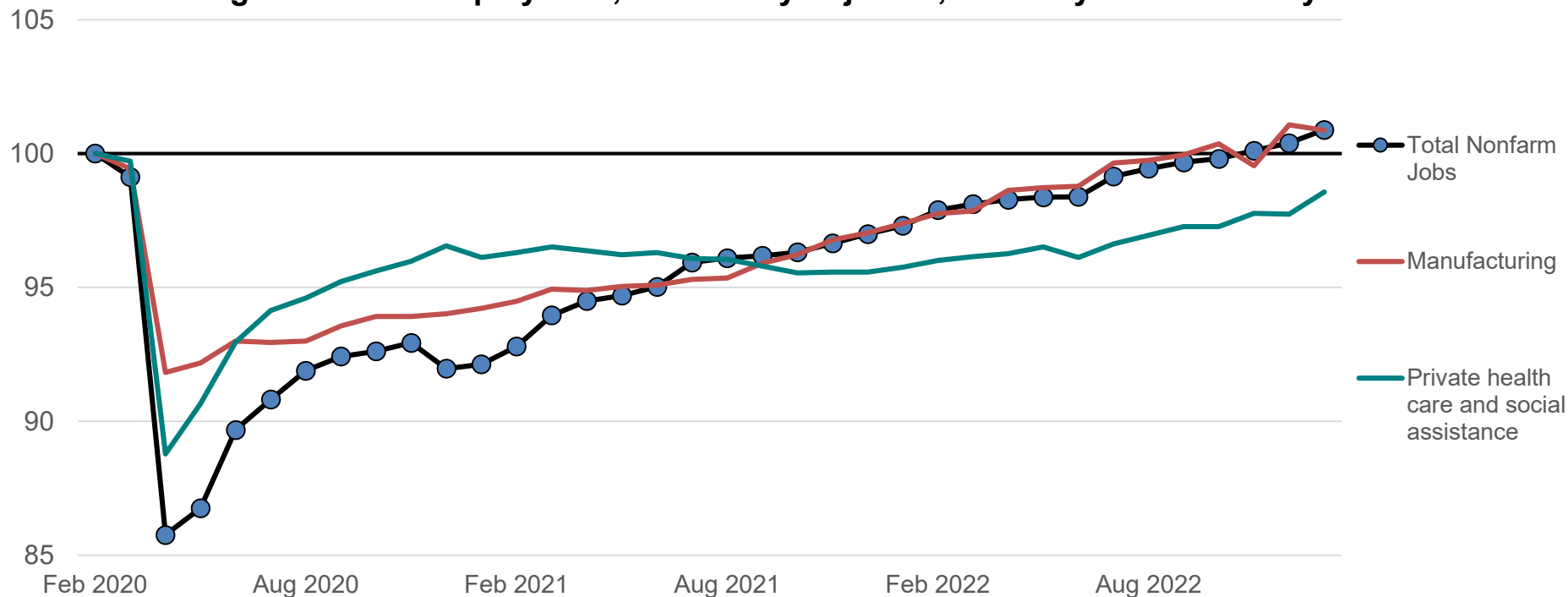
Construction
employment
was not
severely
impacted in
2020

Oregon Construction Employment Indices
Select time periods, seasonally adjusted



Unlike in previous recessions, health care has struggled

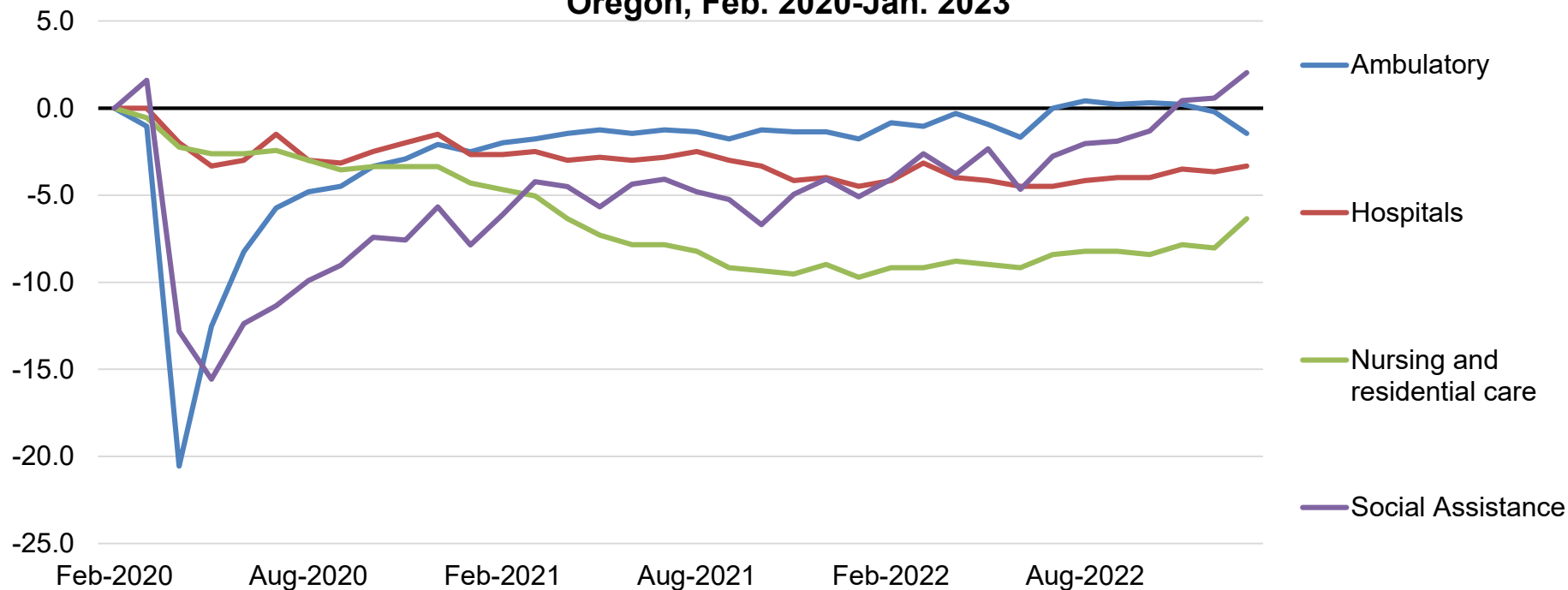
Oregon Indexed Employment, Seasonally Adjusted, February 2020 - January 2023



Source: Oregon Employment Department, Current Employment Statistics

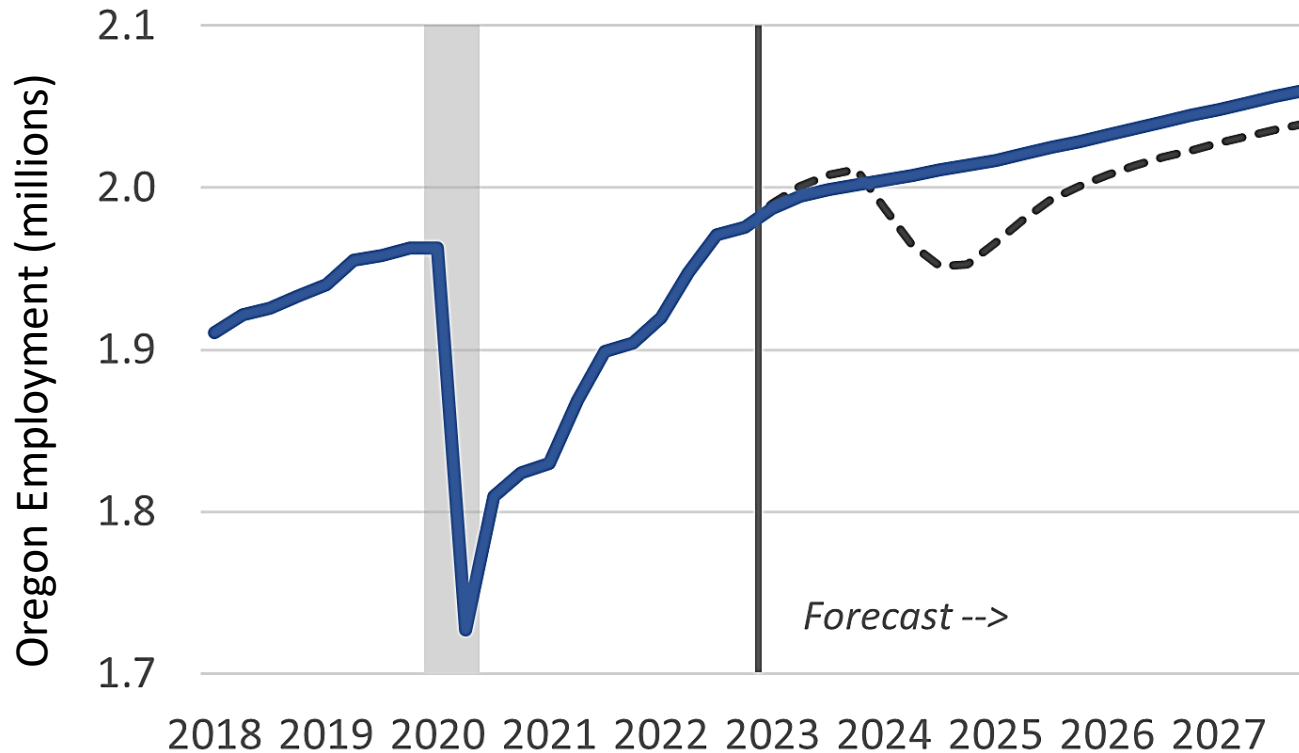
Health care employment post-2020 diverged by subsector

Employment change in health care subsectors
Oregon, Feb. 2020-Jan. 2023



Source: Oregon Employment Department, Current Employment Statistics

Baseline Soft Landing and Boom/Bust Alternative Scenario



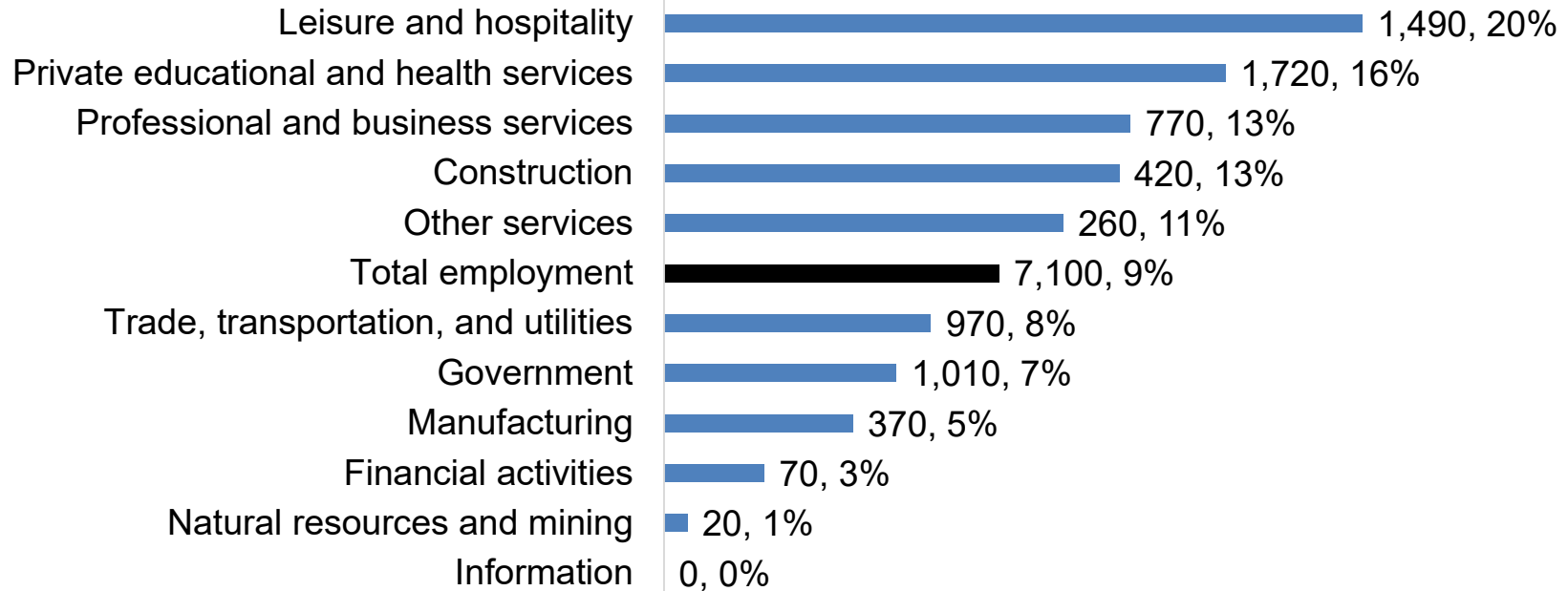
Source: Oregon Office of Economic Analysis

Oregon Office
of Economic
Analysis
baseline
forecast is a
soft landing
(near term).

[Full article and
slides are
available here.](#)

No major industry is projected to decline in SW Oregon

Southwestern Oregon Projected Job Change 2021-2031

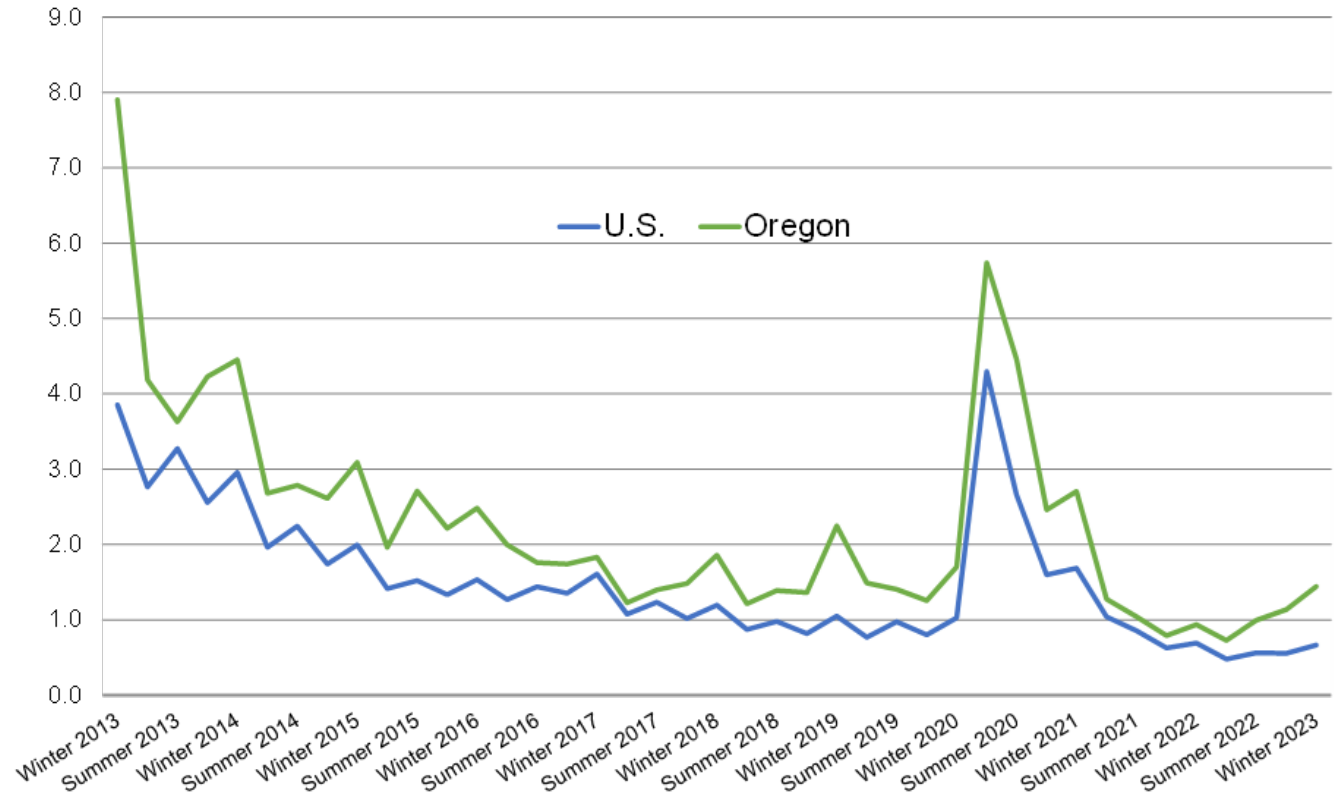


Source: Oregon Employment Department, 2021-2031 Employment Projections

Job Vacancies and Difficulty Finding Workers

Number of unemployed people per private job opening

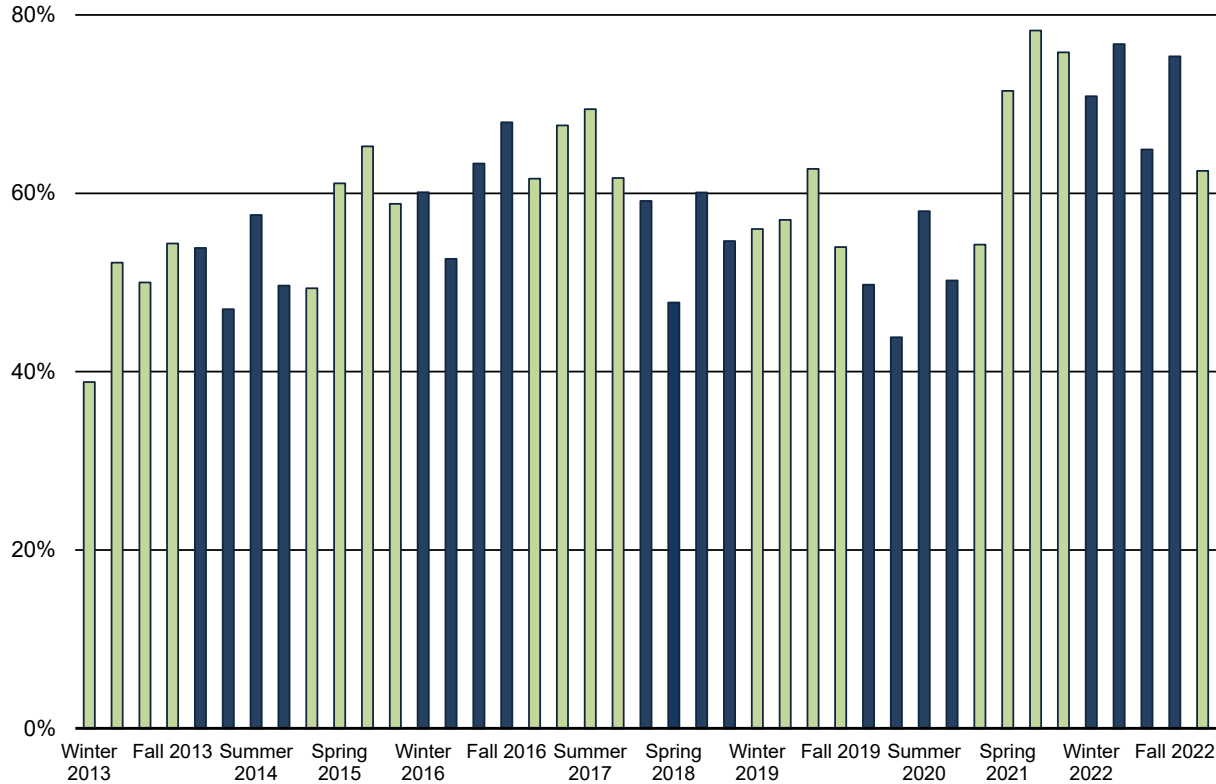
Recent data shows a low jobseeker to vacancy ratio



Source: Oregon Employment Department, Bureau of Labor Statistics



In Oregon, 63% of winter job vacancies were difficult to fill.



Source: Oregon Employment Department, Quarterly Job Vacancy

The occupations with the highest number of difficult-to-fill vacancies:

- Registered nurses (2,200)
- Truck drivers (2,000)
- Restaurant cooks (1,800)
- Nursing assistants (1,600)

Source: Oregon Employment Department Job Vacancy Survey

Job vacancies have increased since 2021 in many areas of the state, with the largest increases in Mid-Valley, Clackamas, Lane, and Portland Metro.

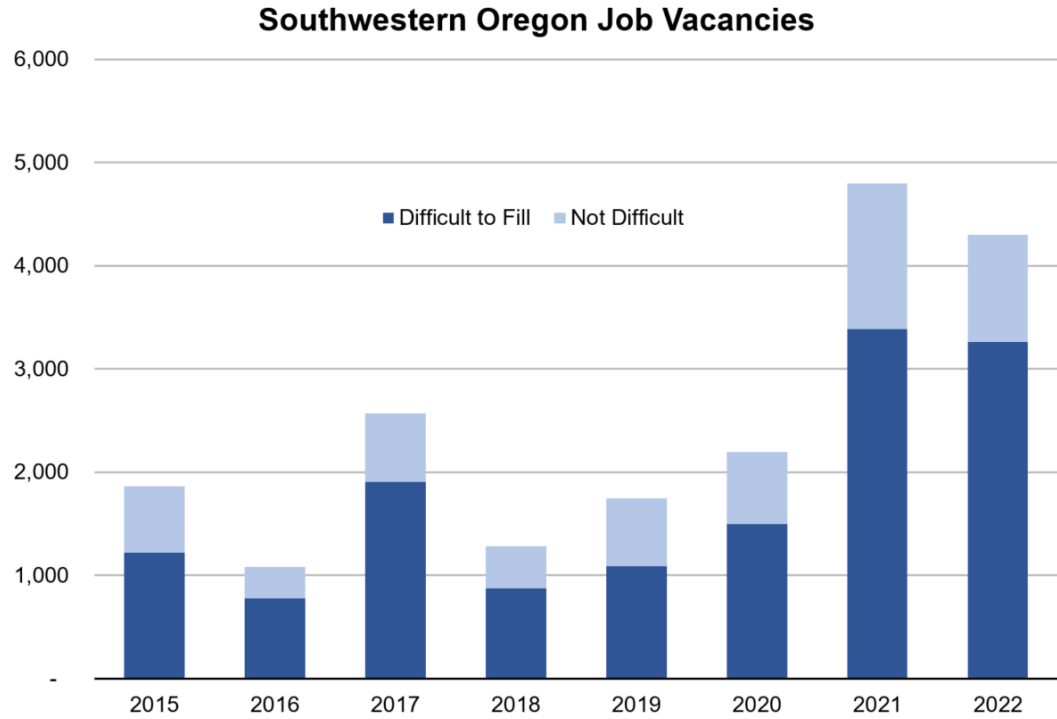
Oregon Job Vacancies by Geography, 2019-2022

Geography	2019	2020	2021	2022	Change from 2021
Oregon Statewide	57,241	44,408	96,887	103,977	7%
Portland Metro	21,218	13,429	28,014	30,991	11%
Mid-Valley	7,091	6,995	12,681	15,083	19%
East Cascades	5,673	4,402	10,771	10,697	-1%
Clackamas	5,795	3,921	10,088	11,934	18%
Lane	5,414	4,029	8,857	10,003	13%
Rogue Valley	4,134	3,749	8,752	8,934	2%
Northwest Oregon	3,357	2,255	7,311	6,624	-9%
Southwestern Oregon	1,745	2,195	4,801	4,298	-10%
Eastern Oregon	2,147	2,527	4,199	4,399	5%
Multi-area or unknown	667	906	1,413	1,014	-28%

Source: Oregon Employment Department



The number of Southwestern Oregon vacancies was slightly lower in 2022 than 2021. Both far exceeded 2020 and before.



Source: Oregon Employment Department



Leisure and hospitality businesses reported the most vacancies of any industry.

Southwestern Oregon Job Vacancies by Industry, 2022

Industry	Vacancies	Average Hourly Wage
All Industries	4,298	\$19.87
Leisure and hospitality	1,021	\$13.68
Health care and social assistance	915	\$21.25
Retail trade	569	\$14.34
Management, administrative, and waste services	351	\$27.61
Construction	296	\$23.34
Manufacturing	289	\$22.23
Transportation, warehousing, and utilities	191	\$22.61
Professional, scientific, and technical services	153	\$25.38
Natural resources and mining	152	\$23.52
Other services	121	\$31.43
Financial activities	91	\$17.58
Wholesale trade	91	\$16.81
Information	32	n/a
Private educational services	26	n/a

Source: Oregon Employment Department



Some jobs are more difficult to fill in SW Oregon

Top Southwestern Oregon Occupations
With the Highest Number of Job Vacancies, 2022

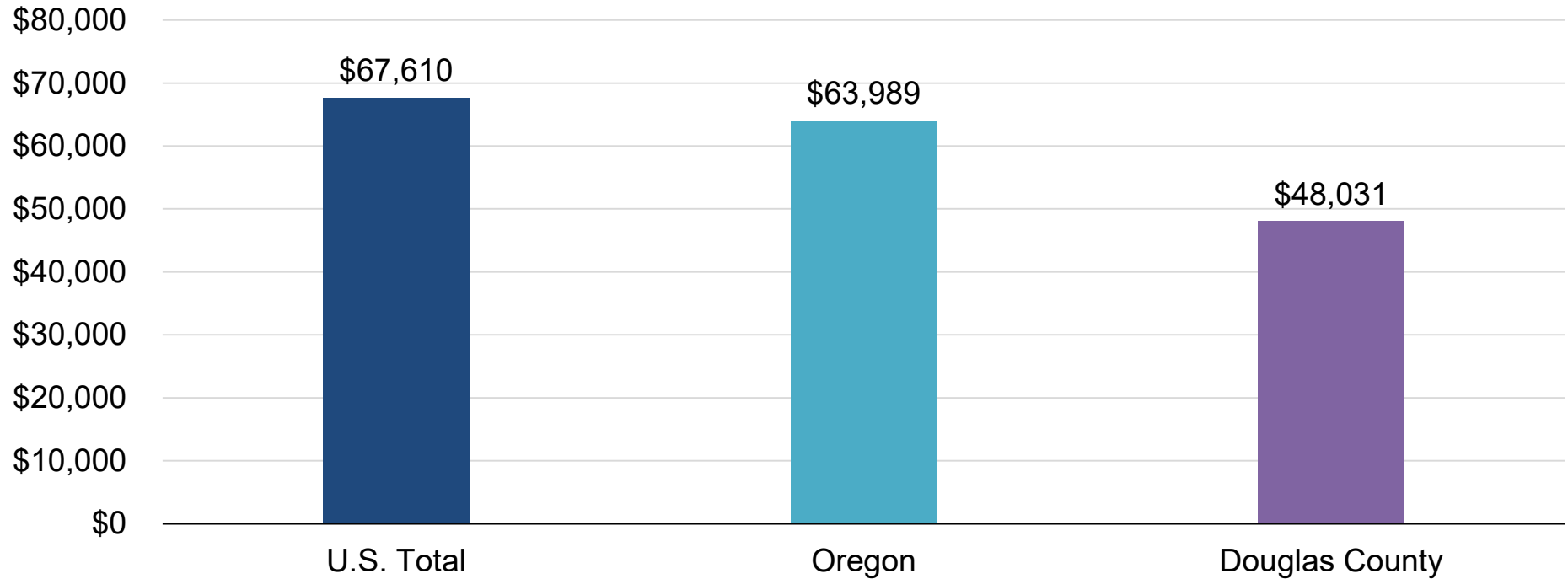
Occupation	Vacancies
Difficult-to-Fill Vacancies in All Occupations	3,259
Fast Food and Counter Workers	334
Heavy and Tractor-Trailer Truck Drivers	214
Retail Salespersons	177
Nursing Assistants	160
Registered Nurses	138
Cooks, Restaurant	97
Landscaping and Groundskeeping Workers	84
Personal Care Aides	83
Cooks, Fast Food	70
Construction Laborers	68
Cashiers	64
Licensed Practical and Licensed Vocational Nurses	62
Logging Workers, All Other	59
Maids and Housekeeping Cleaners	54
Marriage and Family Therapists	53

Source: Oregon Employment Department



Wages are lower in Oregon, and in Douglas in particular

Annual Average Wage, 2021

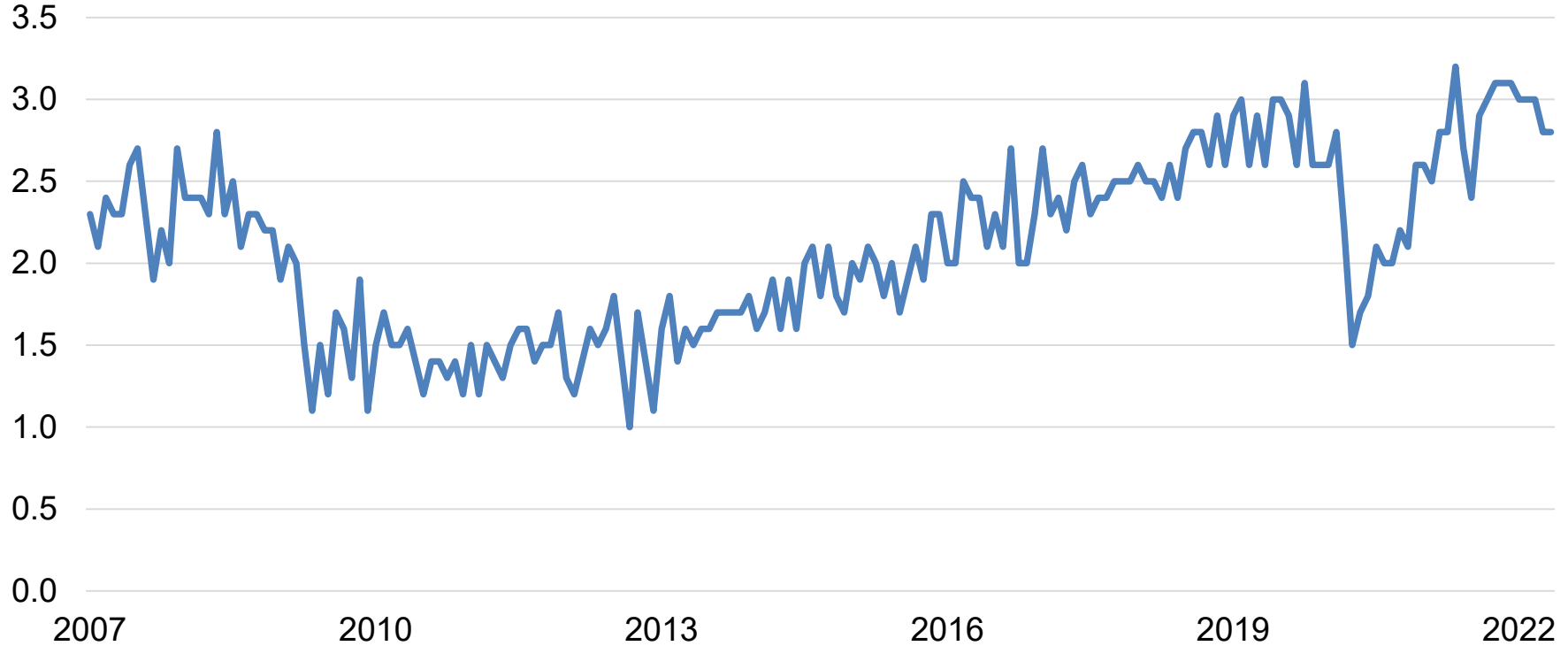


Source: Oregon Employment Department



People are quitting at higher rates, leaving openings behind

Monthly Quits Rate, Oregon

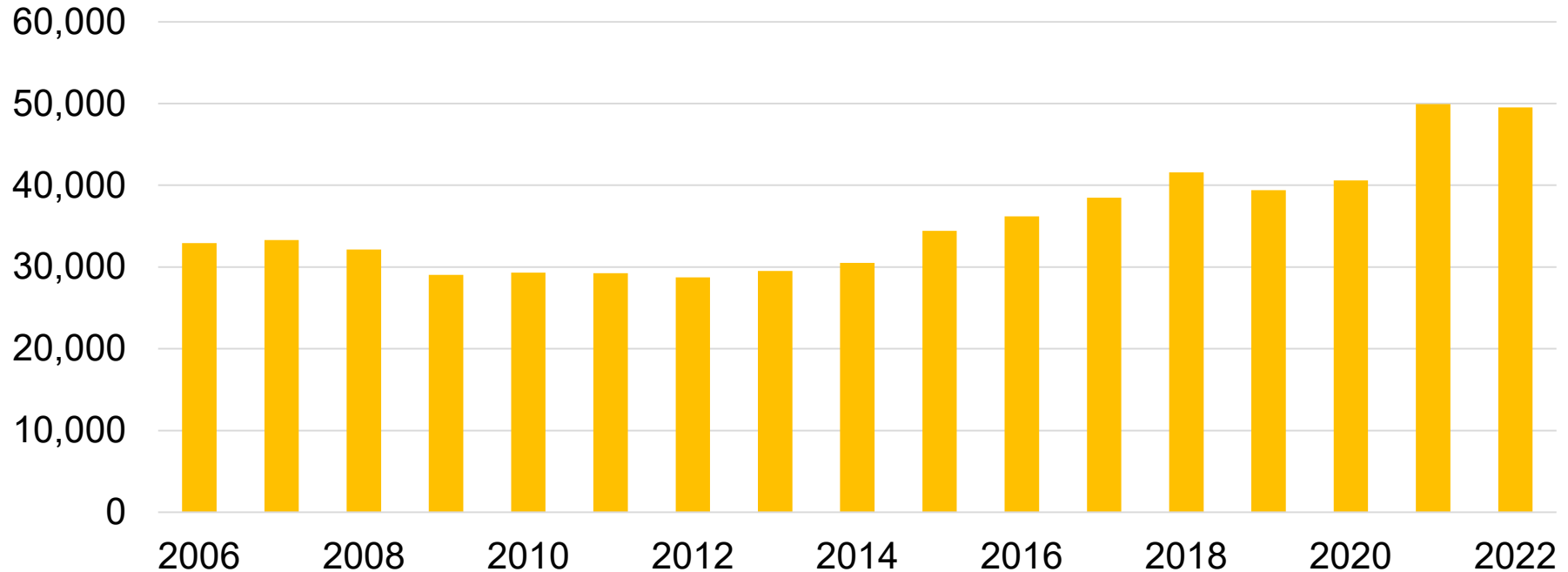


Source: U.S. Bureau of Labor Statistics, Job Opening and Labor Turnover Survey



People are starting businesses at elevated rates

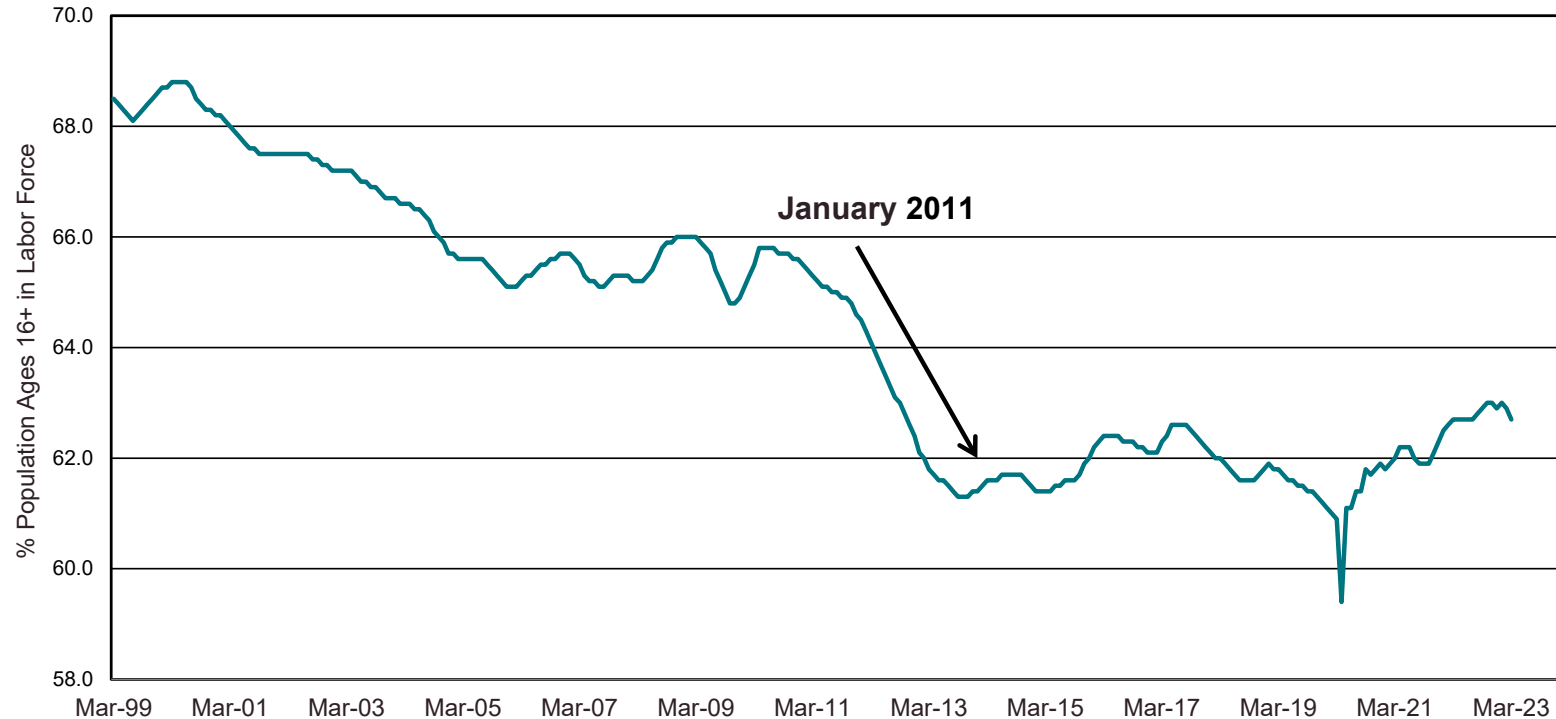
Oregon New Business Applications



Source: U.S. Census Bureau, Business Formation Statistics

Oregon's labor force participation rate was 62.7% in March.

Oregon Labor Force Participation Rate

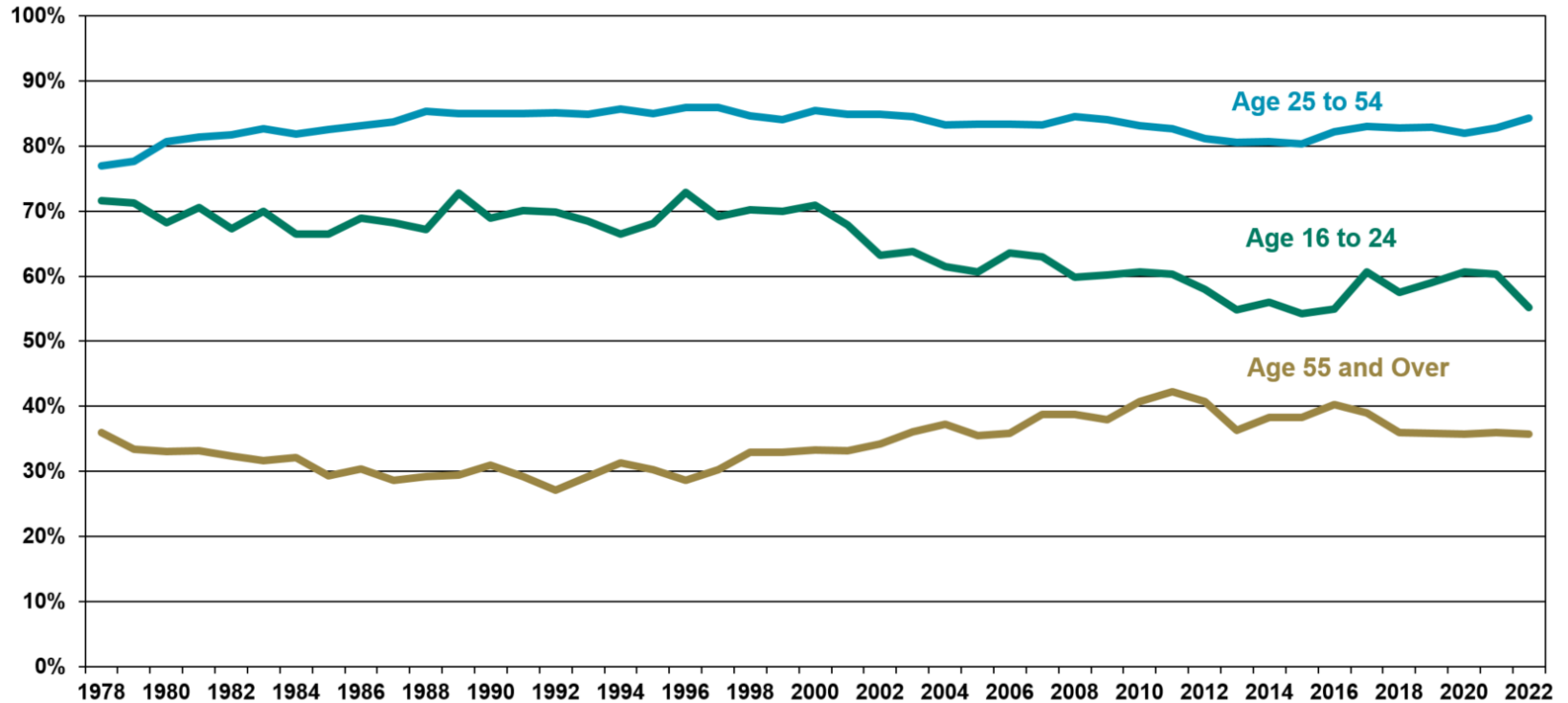


Source: Oregon Employment Department, Local Area Unemployment Statistics



Labor force participation rates vary by age.

Oregon Labor Force Participation Rates by Age Group



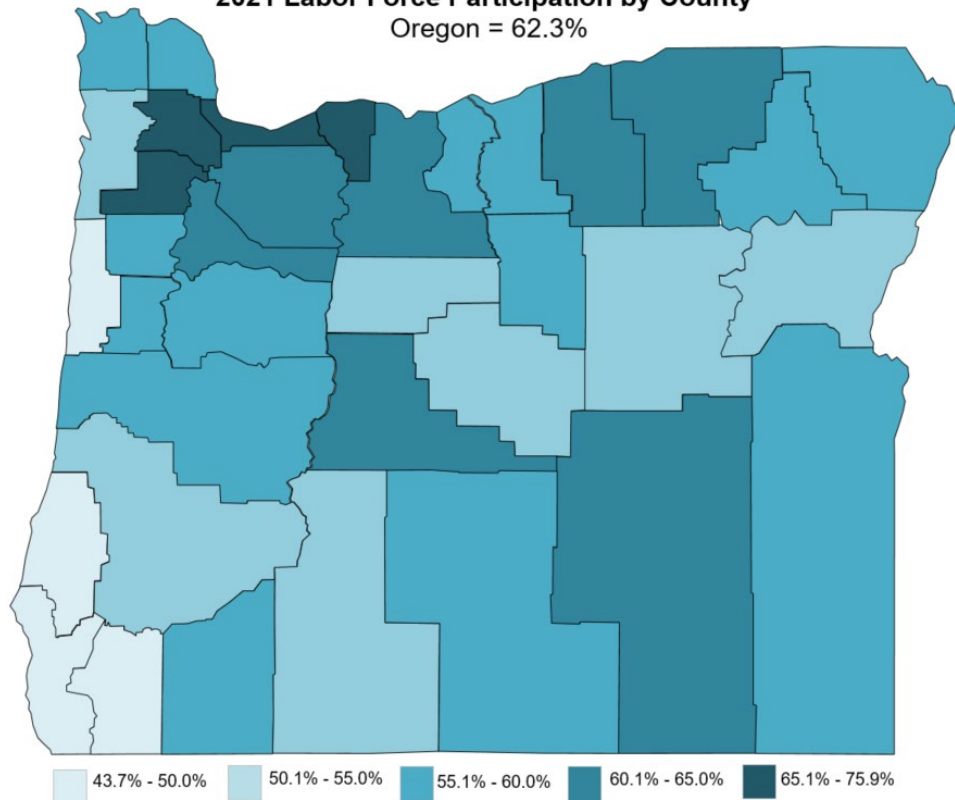
Source: U.S. Bureau of Labor Statistics, Current Population Survey



Labor force participation rates vary widely across counties

2021 Labor Force Participation by County

Oregon = 62.3%



Source: Oregon Employment Department

High
Hood River County
75.9%

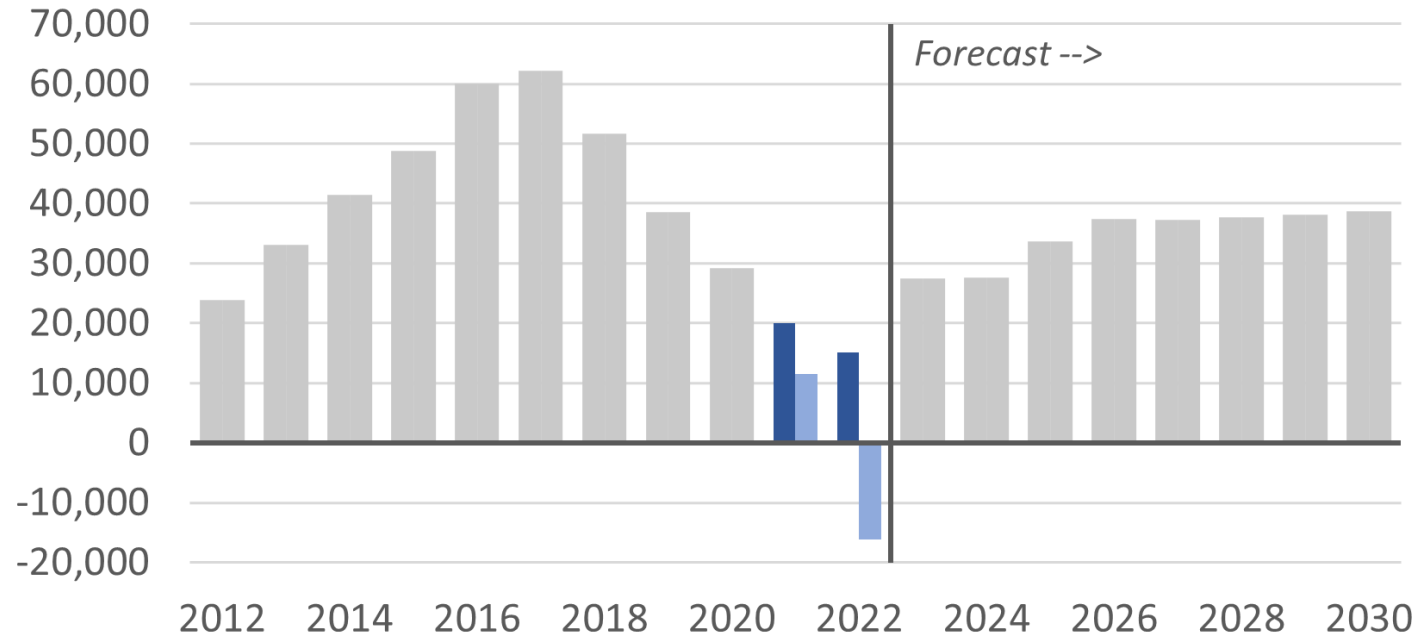
Low
Curry County
43.7%

Population Growth, Housing and Demographics

Oregon population (may be) growing slowly, or declining

Annual change in total state population

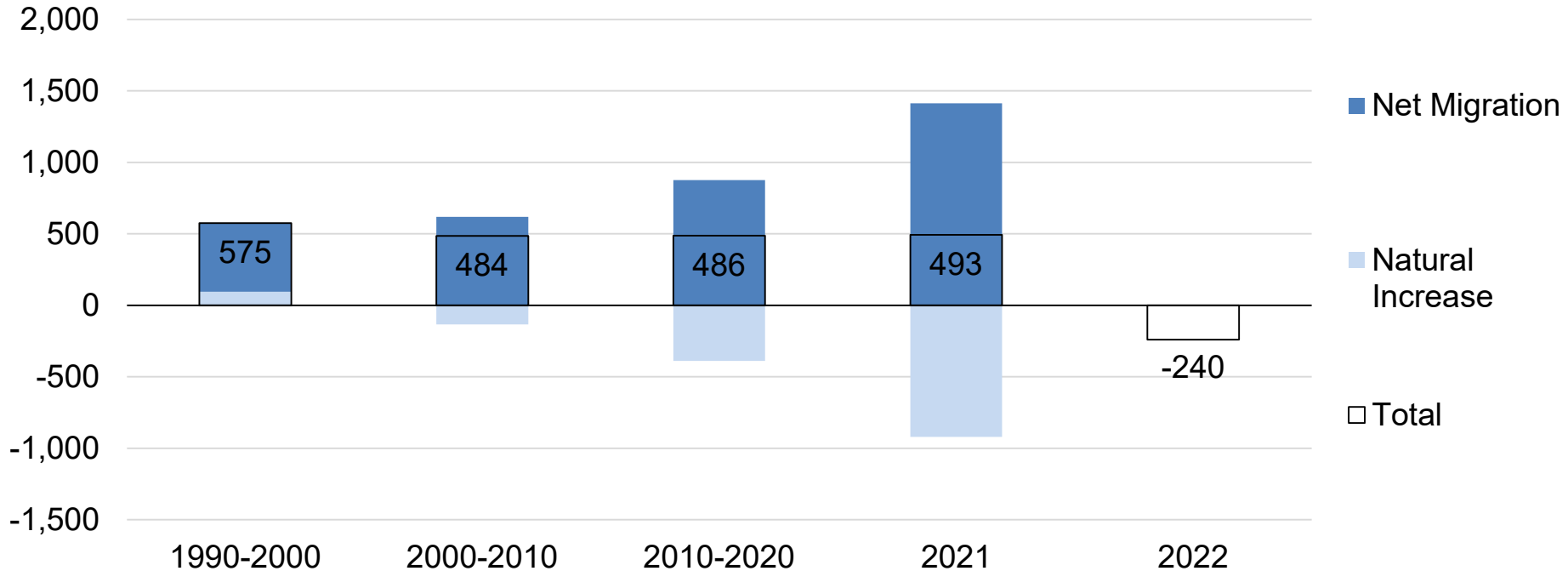
OEA History and Forecast, [Portland State Estimates](#), [Census Bureau Estimates](#)



Source: Census, Portland State Population Research Center, Oregon Office of Economic Analysis

Douglas tends to attract people from out of state

Douglas Annual Population Change
1990-2020 average over decade

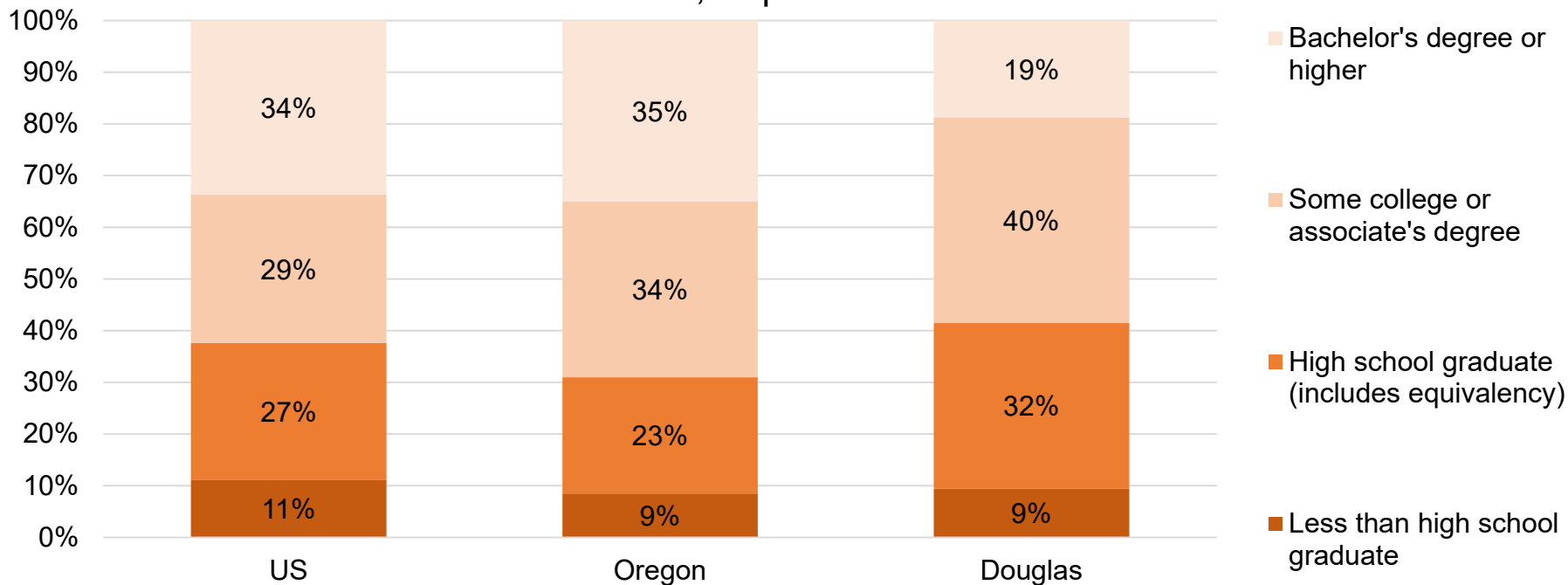


Source: Portland State University Population Research Center, U.S. Census Bureau



Douglas has more HS grads, and less B.A. and higher

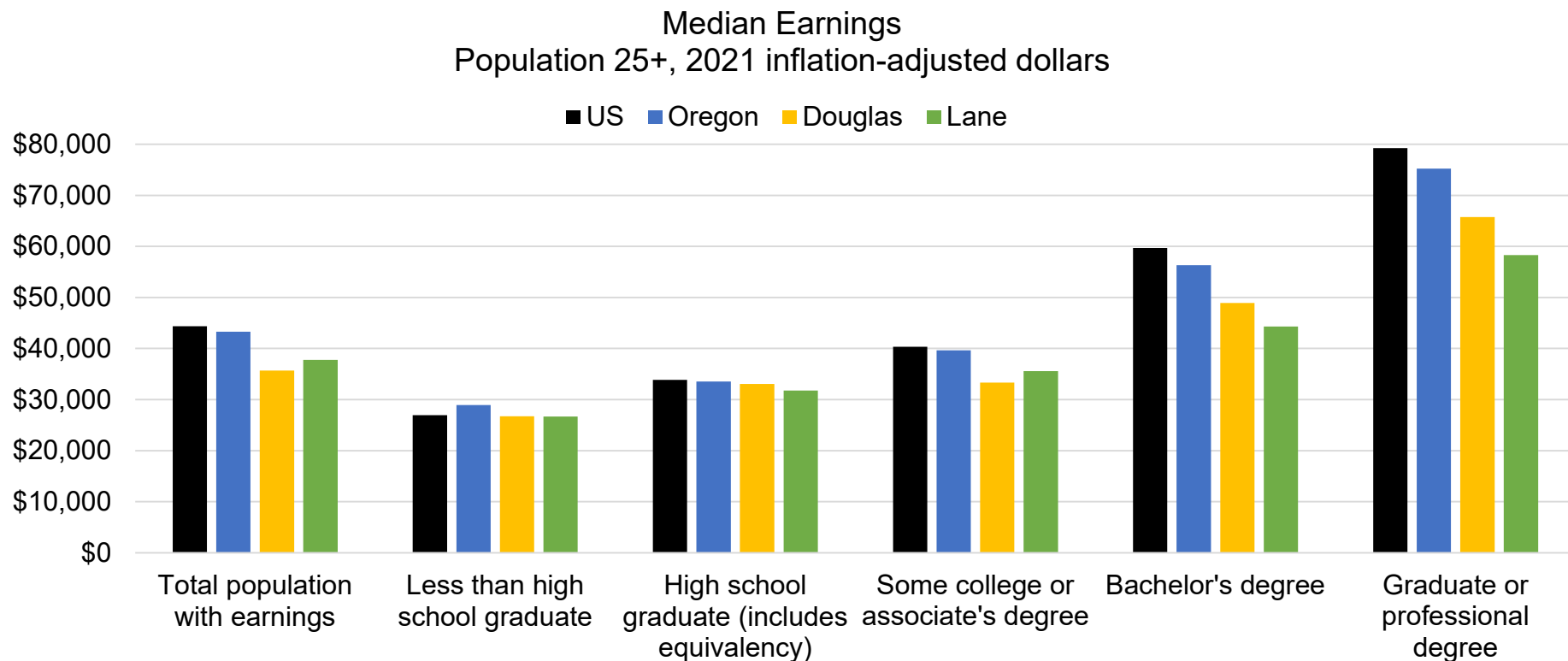
Educational Attainment
2021, Population 25+



Source: U.S. Census Bureau, American Community Survey 5-year estimates



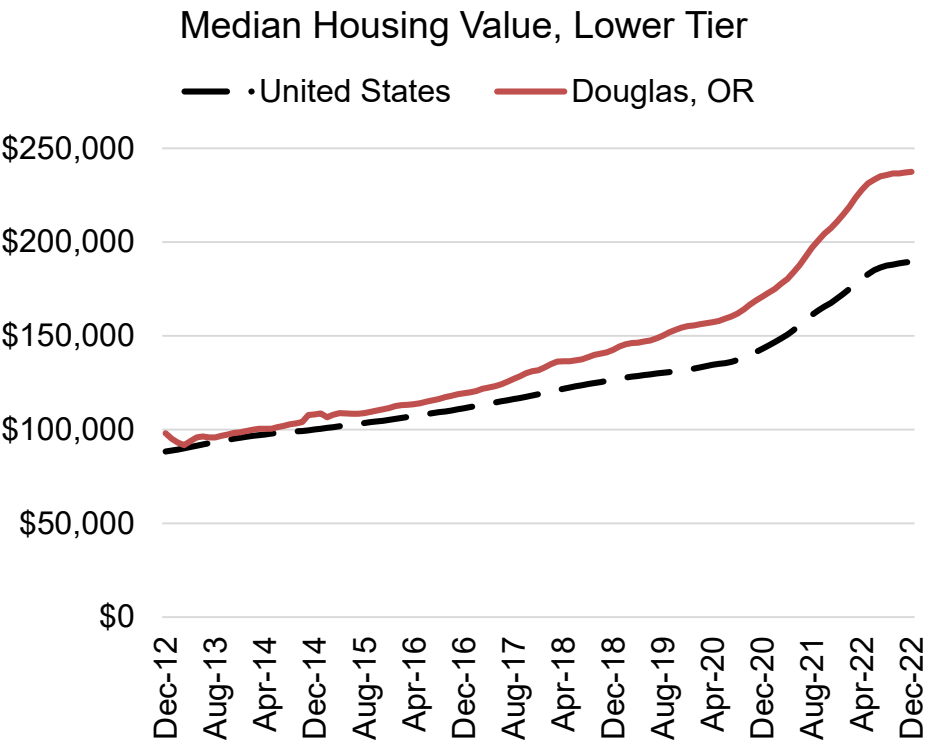
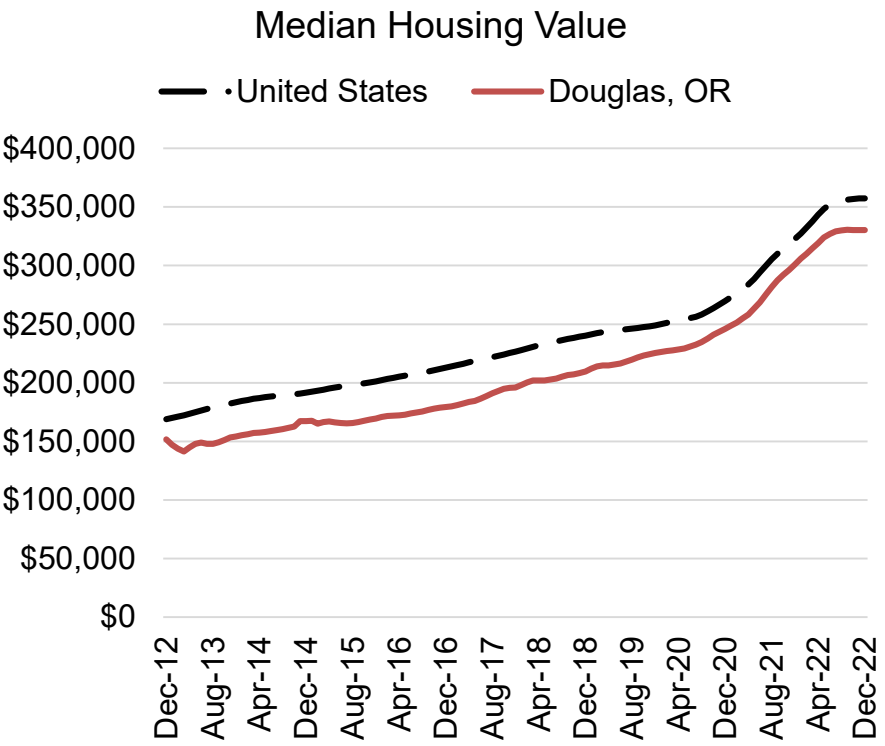
Earnings for higher education levels are lower in Douglas and Lane



Source: U.S. Census Bureau, American Community Survey 5-year estimates



Housing costs have risen, particularly on the affordable end



Source: Zillow Research



Henry Fields

Workforce Analyst, Lane and Douglas counties

Henry.L.Fields@employ.oregon.gov

(541) 359-9178

[Recent Publications and Presentations](#)

