

East Cascades Workforce Update

2nd Quarter, 2025

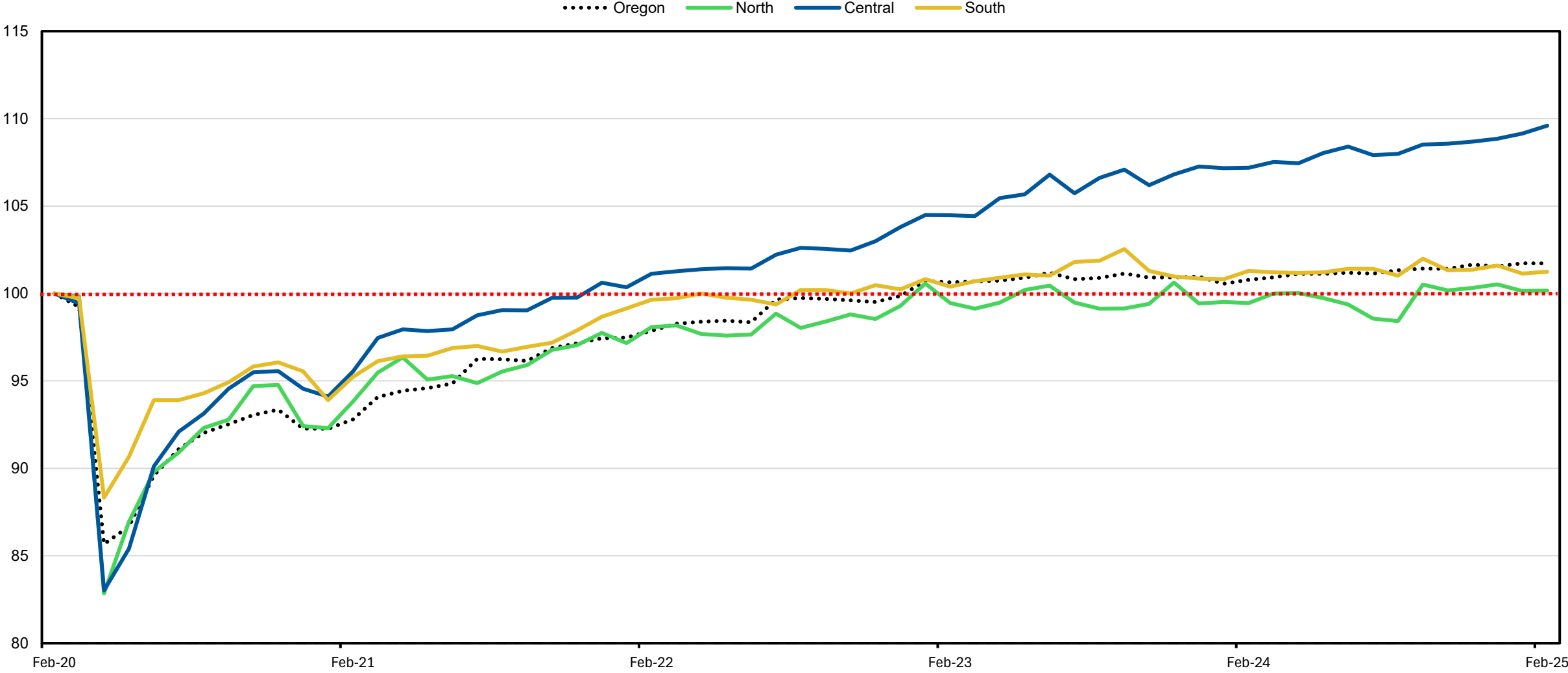
Andrew Grimoldby & Jeff McAllister

AGENDA

- Job Recovery
- Demand for Workers
- Workforce Supply
- Projected Growth

JOB RECOVERY

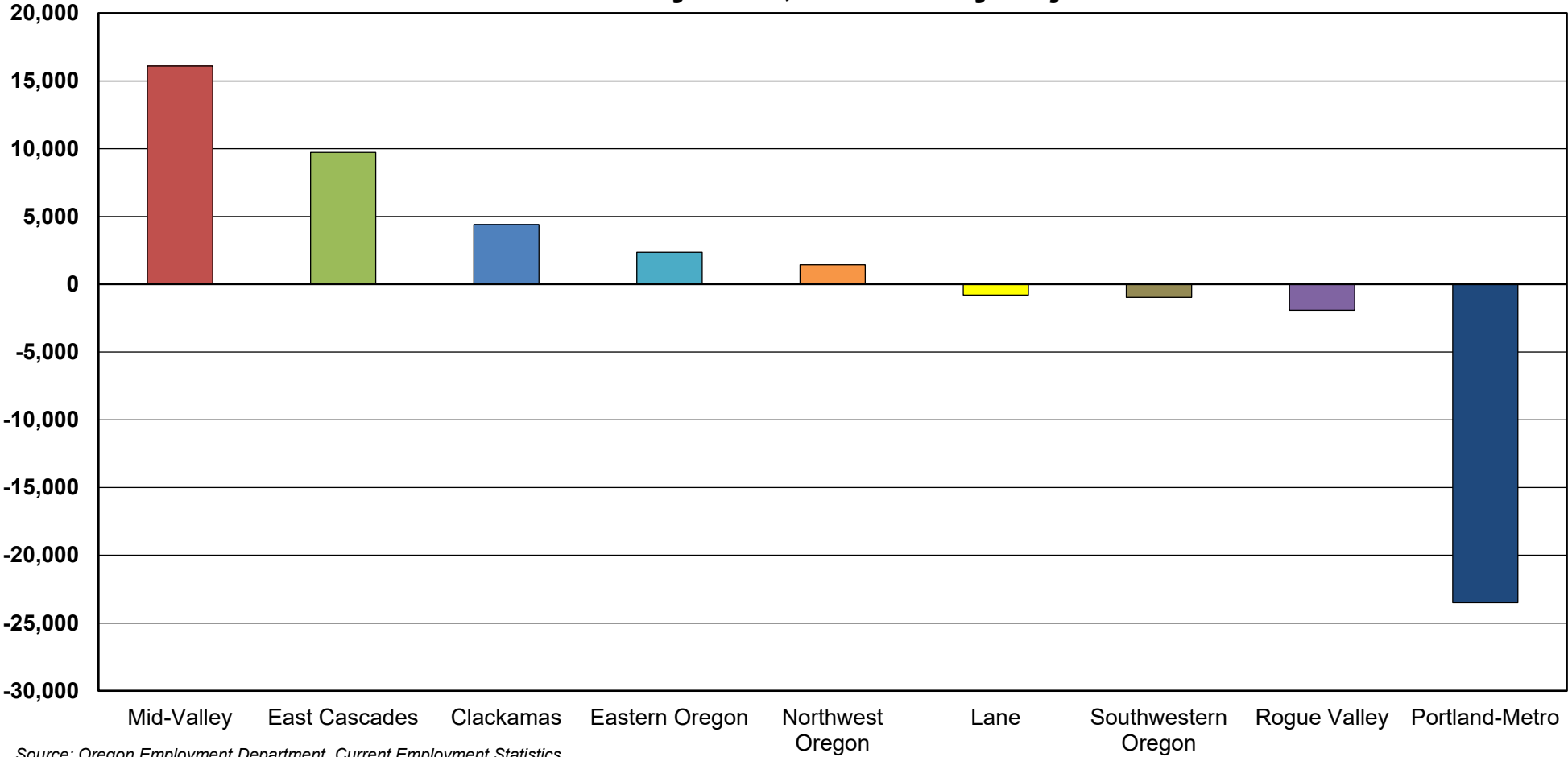
EMPLOYMENT SINCE THE PANDEMIC



Source: Oregon Employment Department, Current Employment Statistics

FIVE OF NINE WORKFORCE AREAS ARE IN A JOBS EXPANSION.

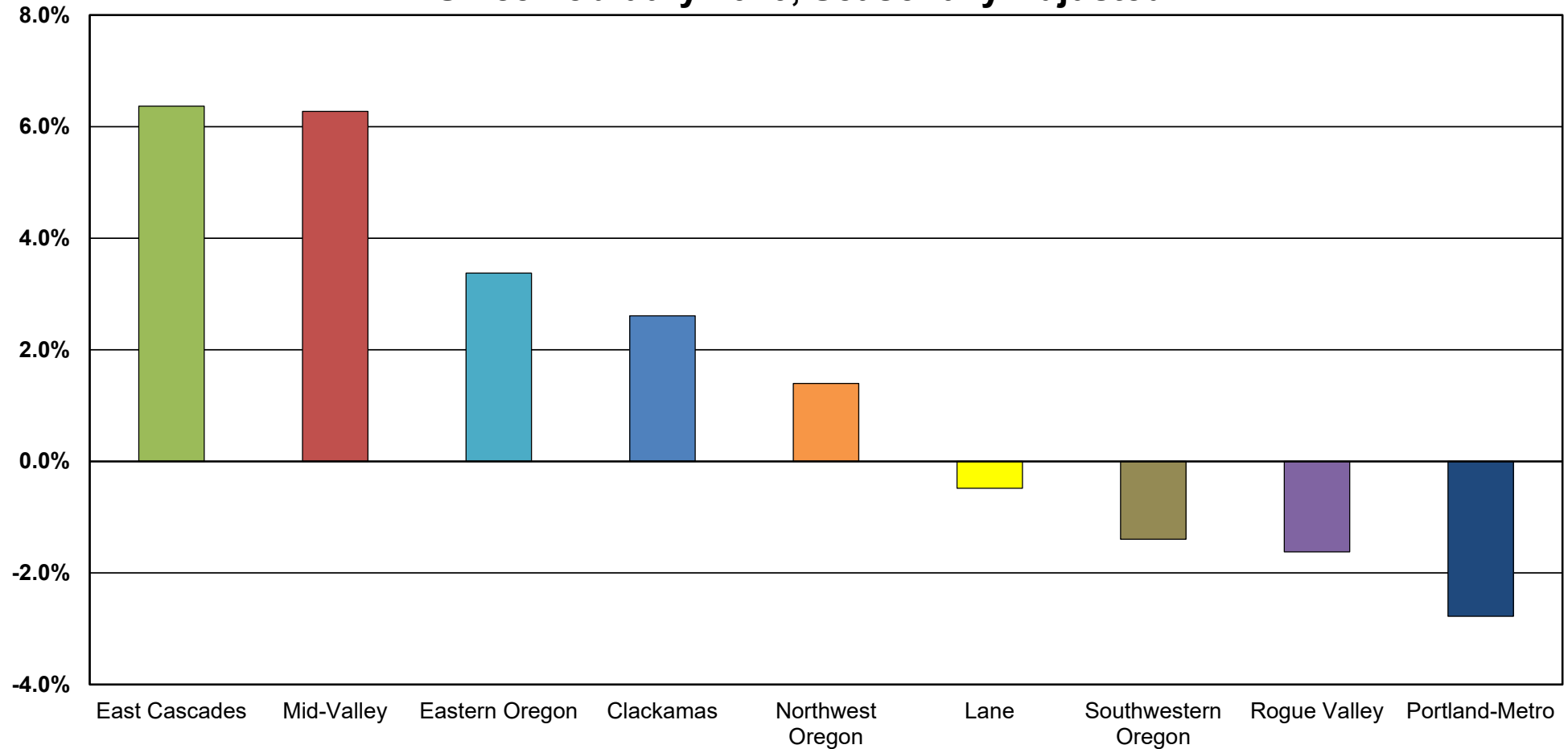
Job Change by Local Workforce Area as of January 2025
Since February 2020, Seasonally Adjusted



Source: Oregon Employment Department, Current Employment Statistics

FIVE OF NINE WORKFORCE AREAS HAVE MORE JOBS THAN BEFORE THE RECESSION.

**Job Change Rates by Local Workforce Area as of January 2025
Since February 2020, Seasonally Adjusted**

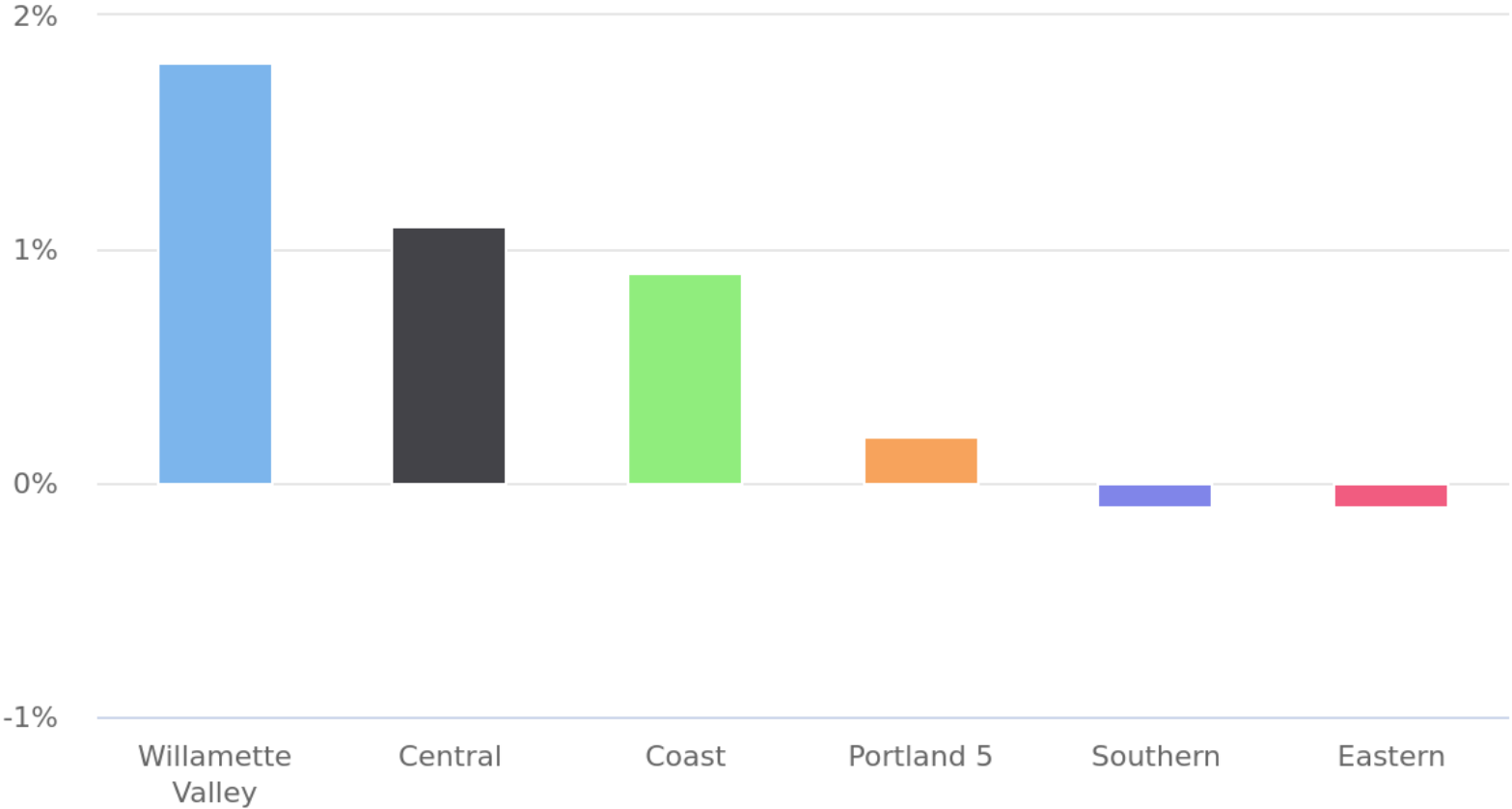


Source: Oregon Employment Department, Current Employment Statistics

THE WILLAMETTE VALLEY GREW AT THE FASTEST RATE OF ANY BROAD REGION OVER THE YEAR

Over-the-Year Employment Change by Region

January 2024 to January 2025, Seasonally Adjusted Nonfarm Employment



Oregon Employment Department, Current Employment Statistics

DEMAND FOR WORKERS

ACROSS OREGON, BUSINESSES REPORTED ROUGHLY 57,800 VACANCIES AT ANY GIVEN TIME IN 2024.

Oregon Private Job Vacancies

	2019	2020	2021	2022	2023	2024
Vacancies	57,241	44,408	96,887	103,977	72,815	57,767
Average Hourly Wage	\$18.81	\$18.05	\$19.69	\$21.66	\$25.13	\$25.37
Full-time Positions	77%	79%	78%	81%	82%	79%
Permanent Positions	93%	92%	93%	94%	94%	94%
Requiring Education Beyond High School	34%	33%	30%	29%	39%	39%
Requiring Previous Experience	57%	53%	53%	52%	58%	55%
Difficult to Fill	57%	51%	72%	72%	61%	55%

The number of Oregon job vacancies declined from 2023 to 2024, matching the level seen in 2019 prior to the pandemic recession.

A typical job vacancy tends to be for a full-time, permanent position. 39% require education beyond high school and 55% require previous experience.

Source: Oregon Employment Department

HEALTH CARE AND SOCIAL ASSISTANCE ACCOUNTED FOR NEARLY ONE THIRD OF ALL VACANCIES IN 2024.

Oregon Job Vacancies by Industry, 2024

Industry	Vacancies	Average Hourly Wage	Full-time Positions	Permanent Positions	Require Education Beyond High School	Require Previous Experience	Difficult to Fill
All Industries	57,767	\$25.37	79%	94%	39%	55%	55%
Health care and social assistance	18,203	\$26.83	76%	97%	55%	42%	53%
Leisure and hospitality	6,367	\$17.11	53%	87%	5%	42%	58%
Manufacturing	5,384	\$24.49	87%	92%	24%	63%	60%
Retail trade	4,793	\$18.56	75%	97%	11%	48%	40%
Management, administrative, and waste services	4,006	\$30.74	84%	89%	31%	71%	40%
Professional, scientific, and technical services	3,875	\$34.27	87%	95%	84%	62%	59%
Other services	3,447	\$24.63	77%	95%	47%	65%	65%
Construction	3,132	\$29.02	94%	93%	33%	83%	80%
Wholesale trade	2,180	\$23.88	90%	99%	22%	77%	54%
Financial activities	1,882	\$27.21	95%	99%	43%	72%	47%
Private educational services	1,632	\$32.41	82%	91%	77%	27%	16%
Transportation, warehousing, and utilities	1,508	\$26.14	94%	94%	53%	80%	77%
Natural resources and mining	645	\$22.53	87%	57%	10%	49%	89%
Information	403	\$23.99	90%	98%	47%	93%	66%

Unknown industry excluded

Source: Oregon Employment Department

JOB VACANCIES HAVE DECREASED SINCE 2023 IN ALL AREAS OF THE STATE.

Oregon Job Vacancies by Geography, 2019-2024

Geography	2019	2020	2021	2022	2023	2024	Change from 2023
Oregon Statewide	57,241	44,408	96,887	103,977	72,815	57,767	-21%
Portland Metro	21,218	13,429	28,014	30,991	21,685	16,941	-22%
Mid-Valley	7,091	6,995	12,681	15,083	9,190	8,382	-9%
East Cascades	5,673	4,402	10,771	10,697	9,024	5,941	-34%
Clackamas	5,795	3,921	10,088	11,934	7,481	6,695	-11%
Lane	5,414	4,029	8,857	10,003	7,704	6,396	-17%
Rogue Valley	4,134	3,749	8,752	8,934	5,214	3,763	-28%
Northwest Oregon	3,357	2,255	7,311	6,624	4,684	3,346	-29%
Southwestern Oregon	1,745	2,195	4,801	4,298	3,301	2,476	-25%
Eastern Oregon	2,147	2,527	4,199	4,399	3,035	2,583	-15%
Multi-area or unknown	667	906	1,413	1,014	1,497	1,244	-17%

Source: Oregon Employment Department

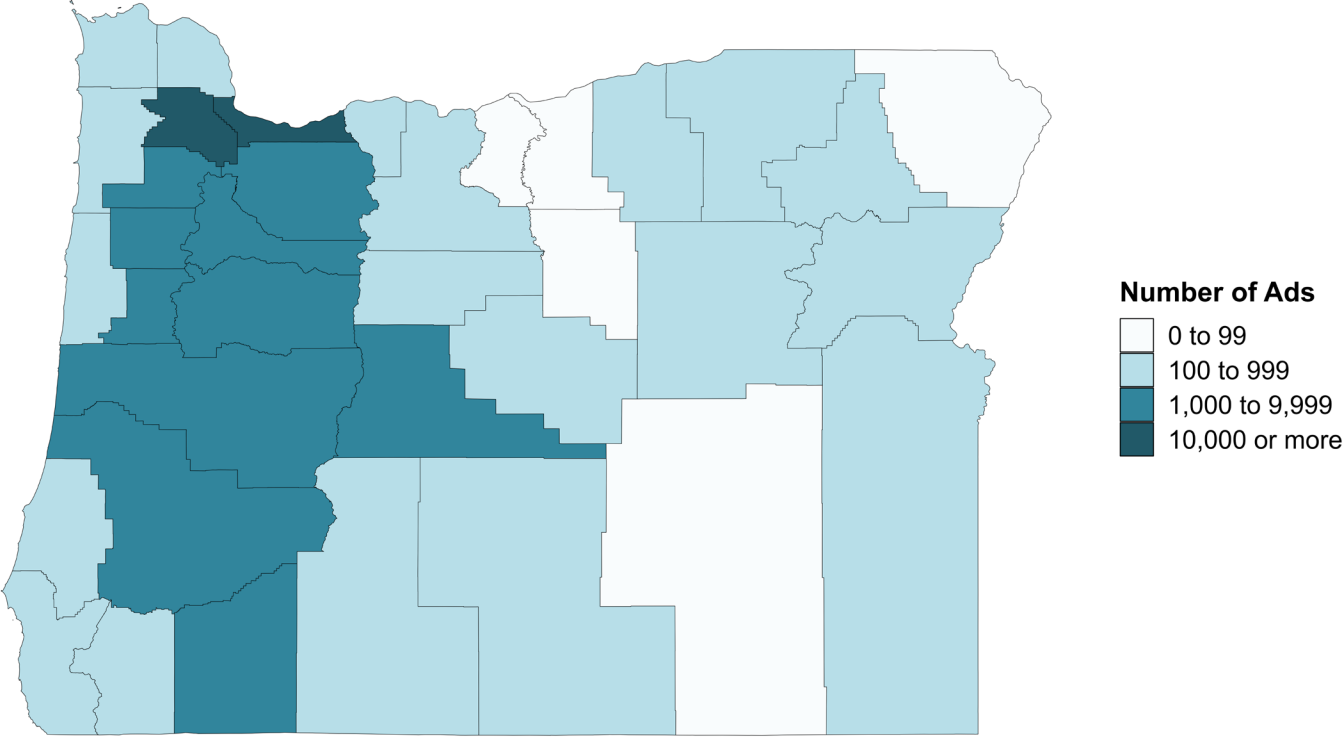
Help Wanted Online Ads by County

January 2025, Not Seasonally Adjusted

Multnomah	20,815	Lincoln	900	Jefferson	216
Washington	14,904	Umatilla	714	Baker	210
Marion	9,077	Klamath	644	Crook	207
Clackamas	8,890	Clatsop	559	Morrow	146
Lane	6,850	Coos	543	Curry	123
Deschutes	2,748	Josephine	534	Grant	111
Jackson	2,275	Columbia	484	Lake	109
Benton	2,007	Malheur	442	Harney	93
Linn	1,908	Hood River	402	Wallowa	79
Yamhill	1,598	Tillamook	329	Sherman	40
Polk	1,026	Wasco	297	Gilliam	35
Douglas	1,003	Union	226	Wheeler	17

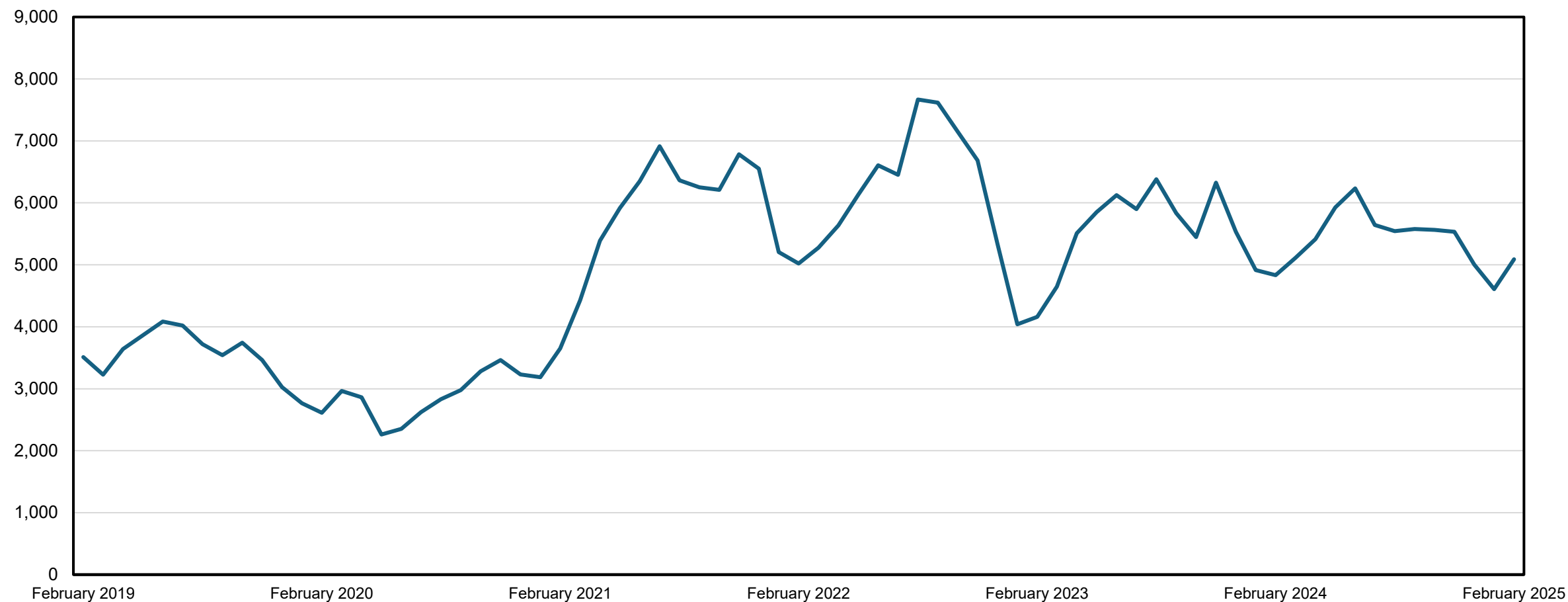
Source: The Conference Board Help Wanted OnLine® (HWOL)

Help Wanted Online Ads, January 2025
Not Seasonally Adjusted



Source: Oregon Employment Department; The Conference Board Help Wanted OnLine® (HWOL)

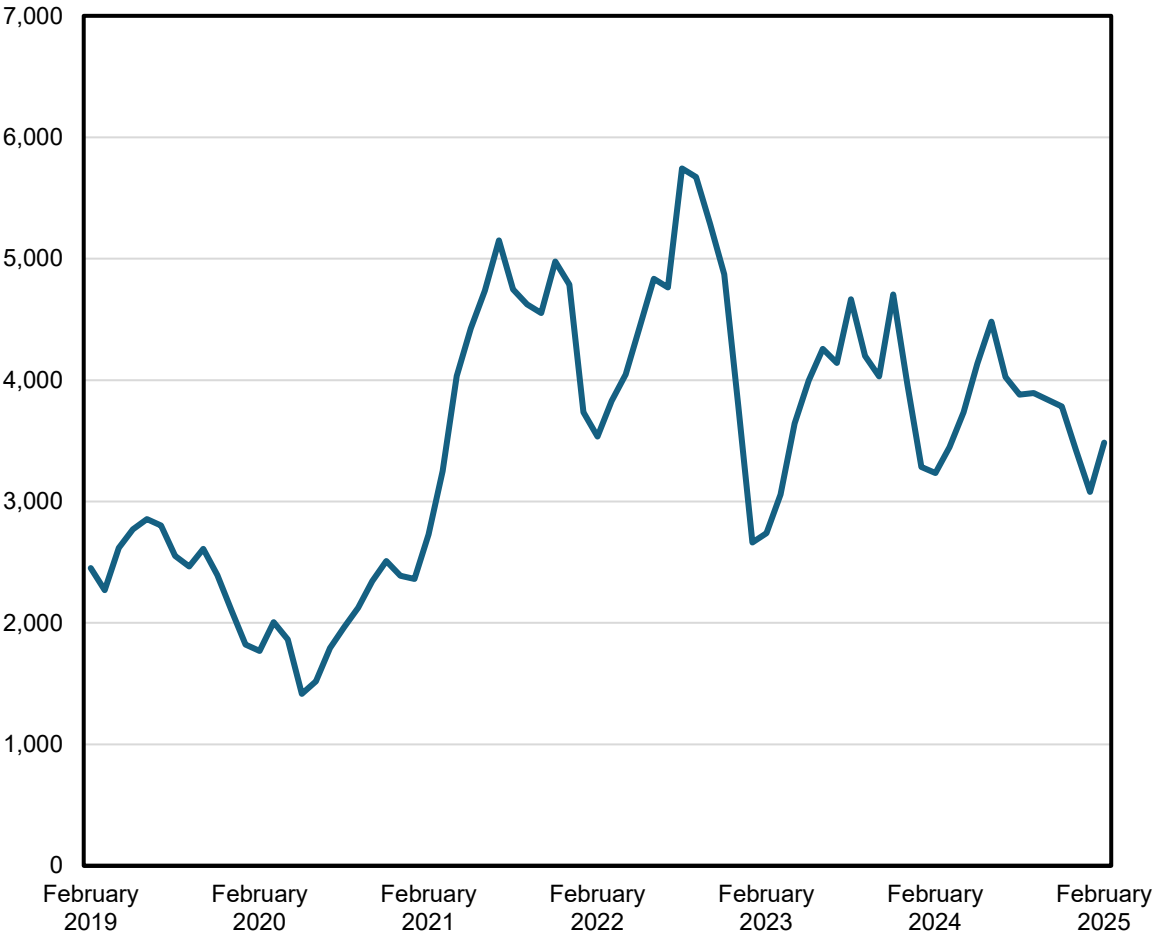
East Cascades Help Wanted Online Ads



Source: The Conference Board-Lightcast Help Wanted OnLine® 2025

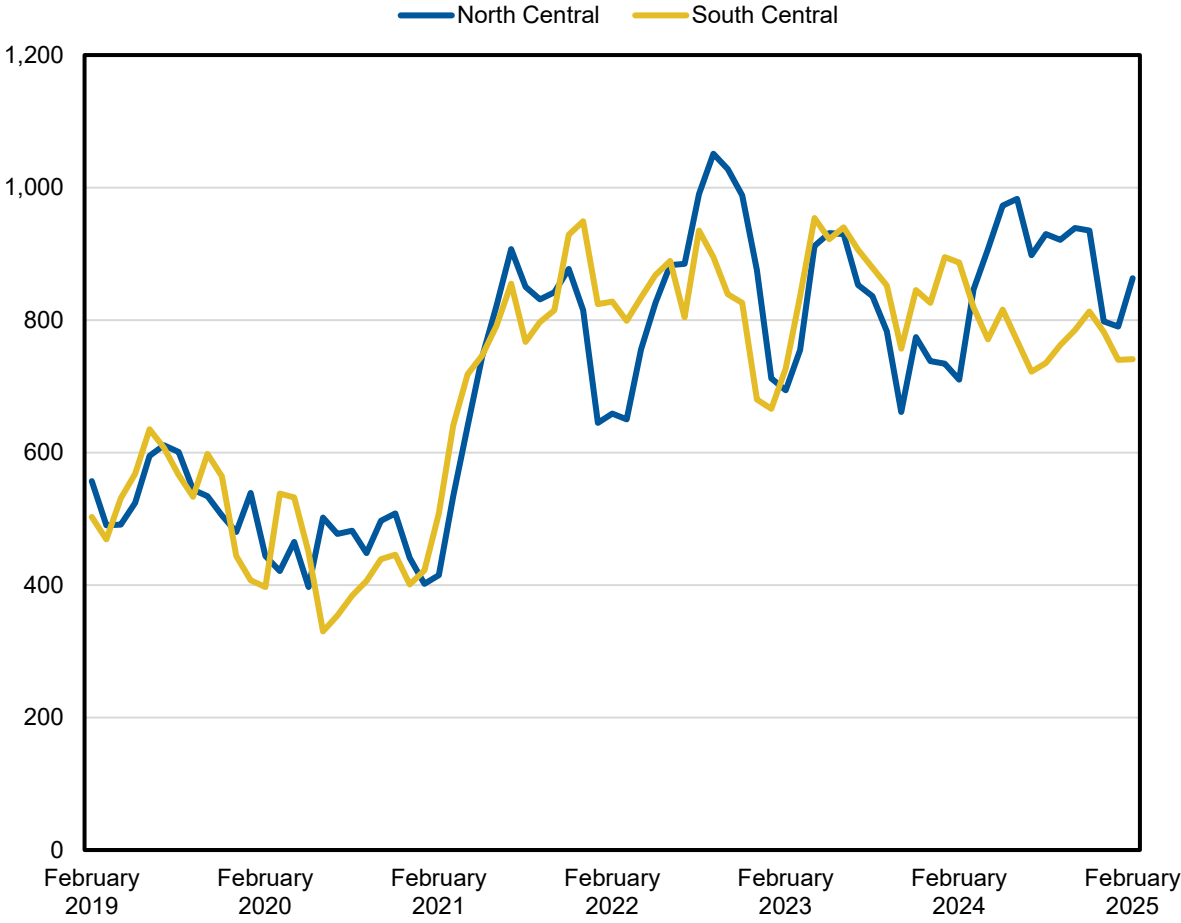
HELP WANTED ONLINE ADS BY REGION

Central



Source: The Conference Board-Lightcast Help Wanted OnLine® 2025

North and South Central

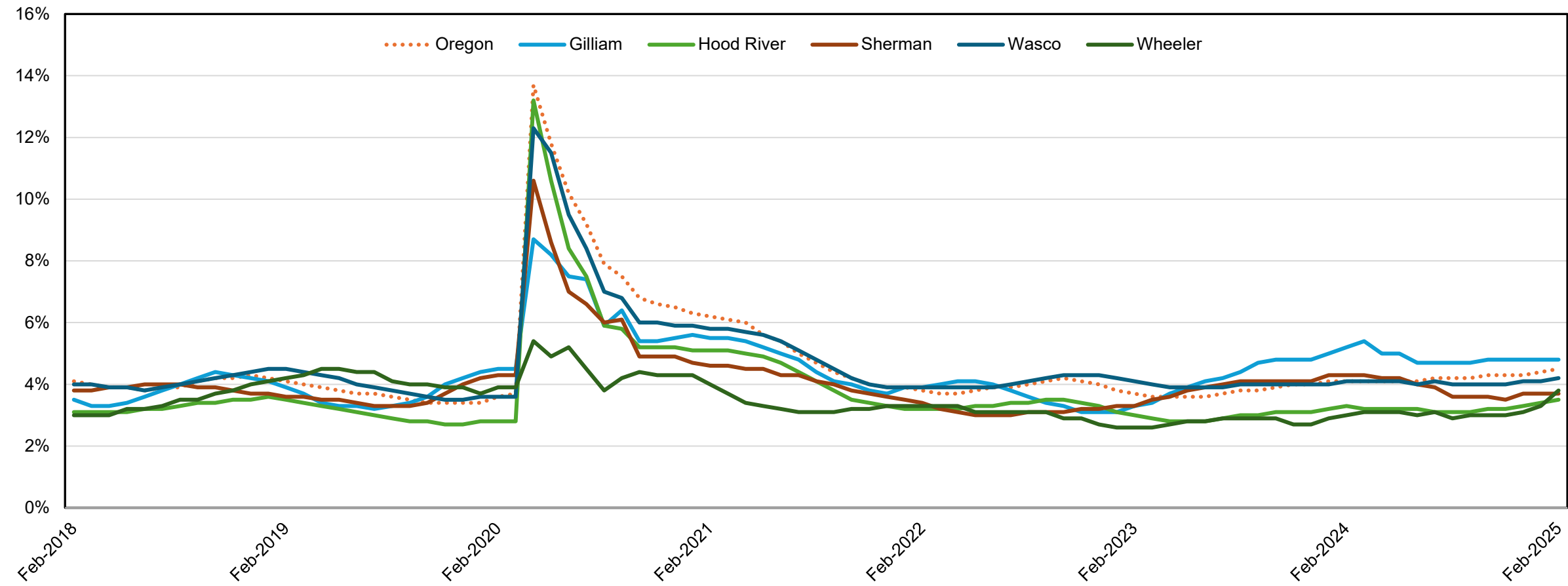


Source: The Conference Board-Lightcast Help Wanted OnLine® 2025

WORKFORCE SUPPLY

UNEMPLOYMENT IN THE COLUMBIA GORGE

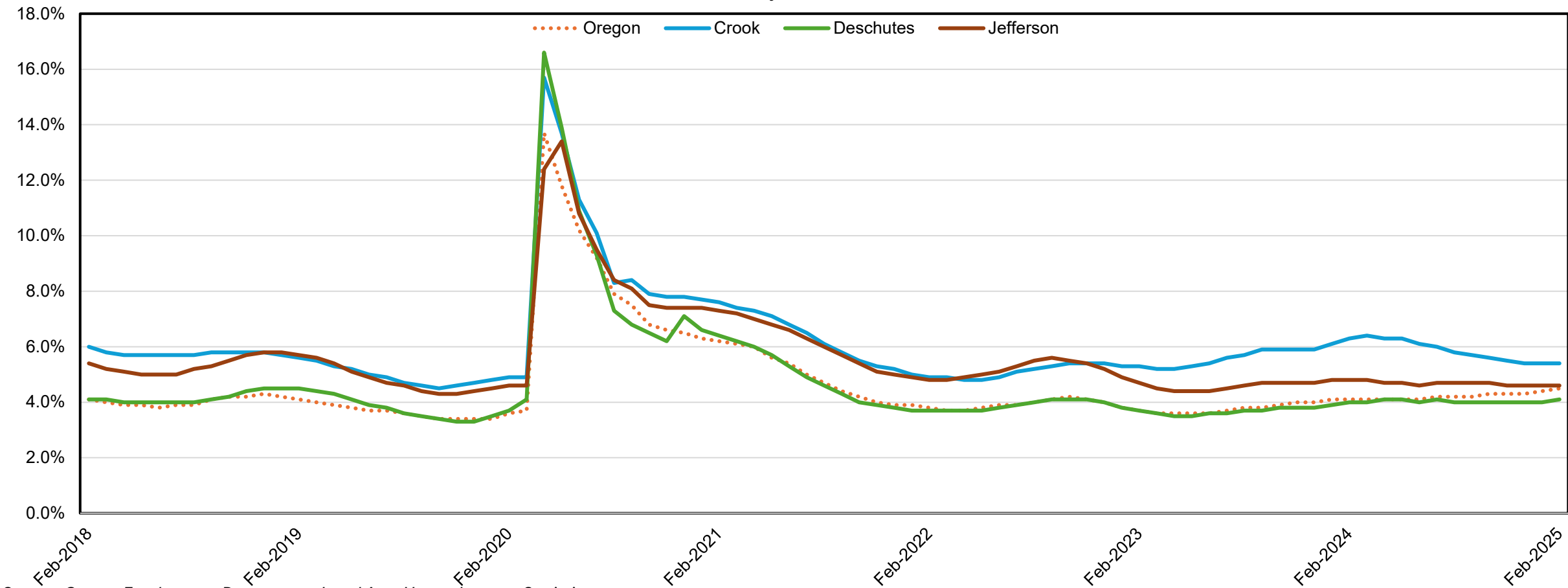
Columbia Gorge Unemployment Rates
February 2018-2025



Source: Oregon Employment Department, Local Area Unemployment Statistics

UNEMPLOYMENT IN CENTRAL OREGON

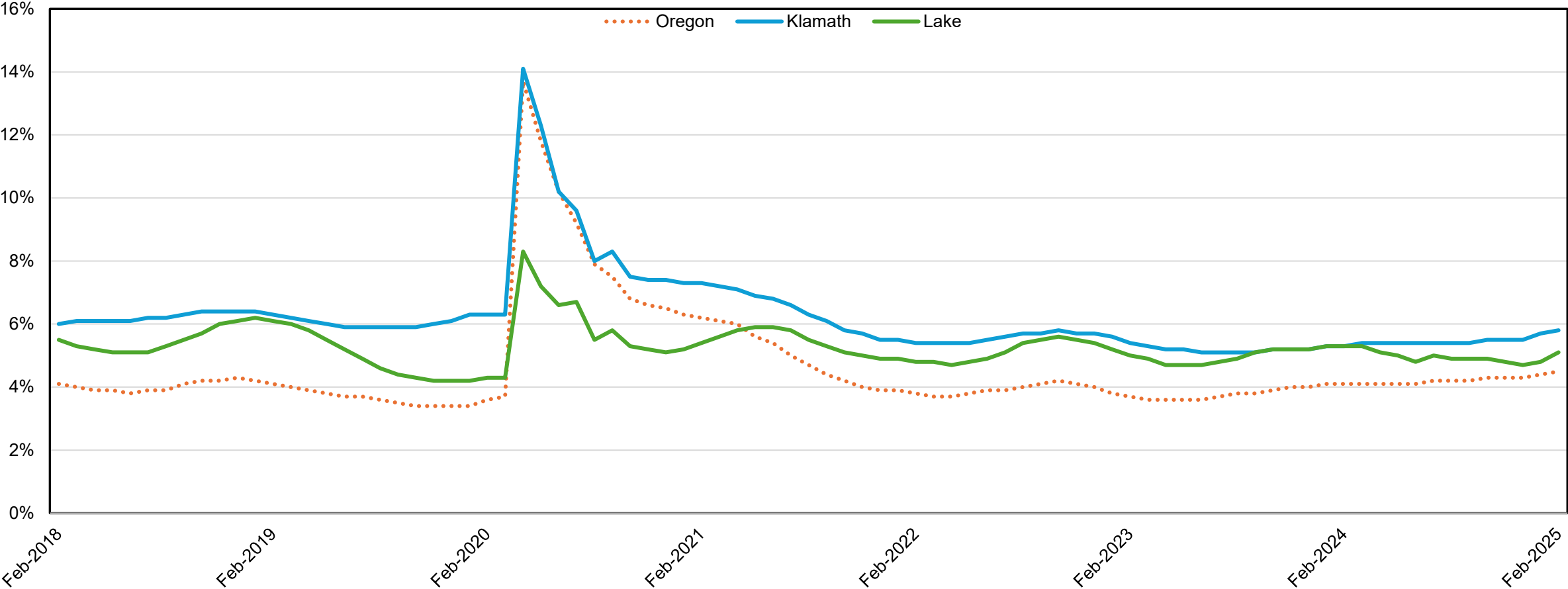
Central Oregon Unemployment Rates
February 2018-2025



Source: Oregon Employment Department, Local Area Unemployment Statistics

UNEMPLOYMENT IN SOUTH CENTRAL

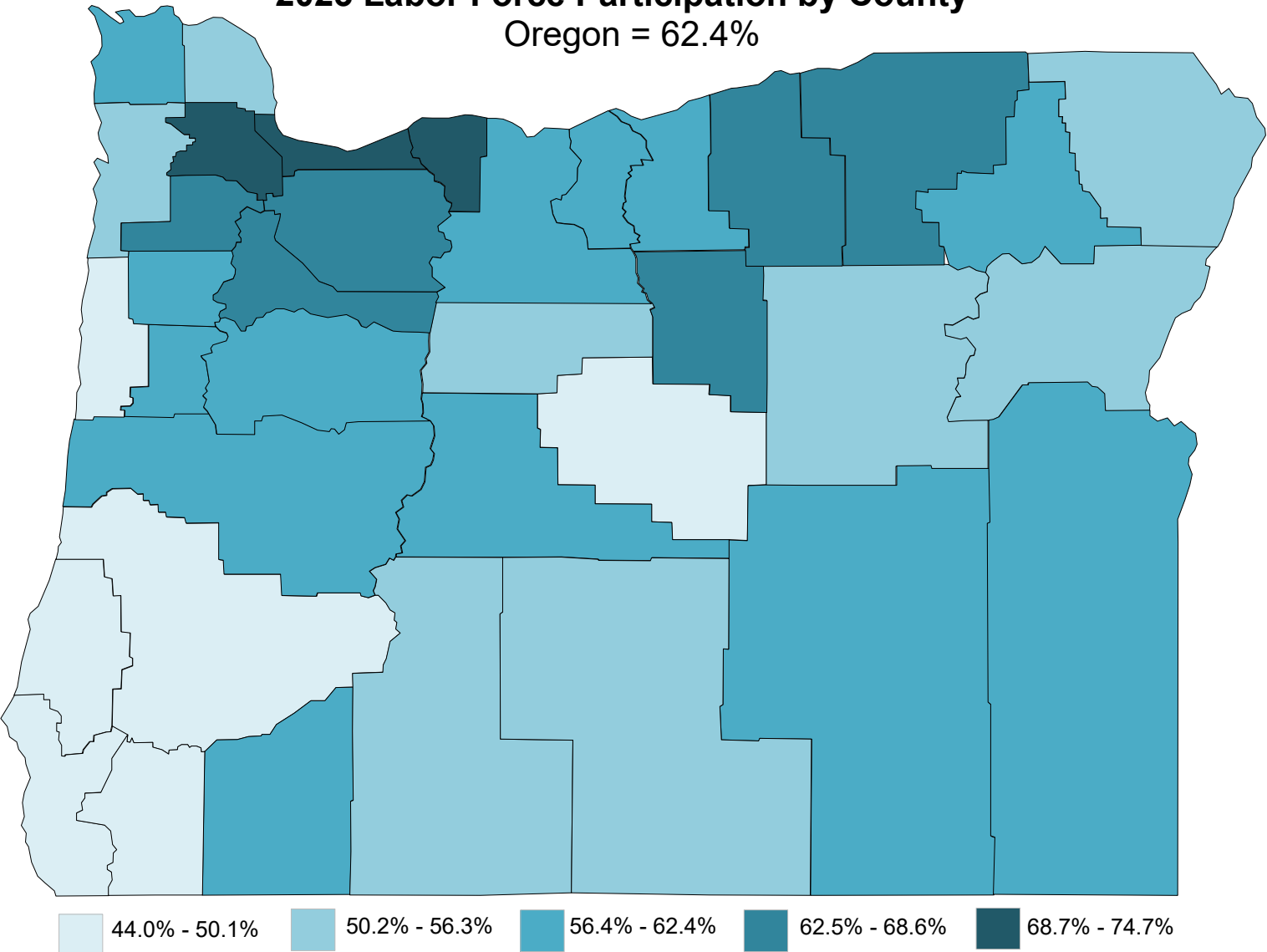
South Central Unemployment Rates
February 2018-2025



Source: Oregon Employment Department, Local Area Unemployment Statistics

LABOR FORCE PARTICIPATION RATES VARY WIDELY ACROSS OREGON'S COUNTIES.

2023 Labor Force Participation by County
Oregon = 62.4%

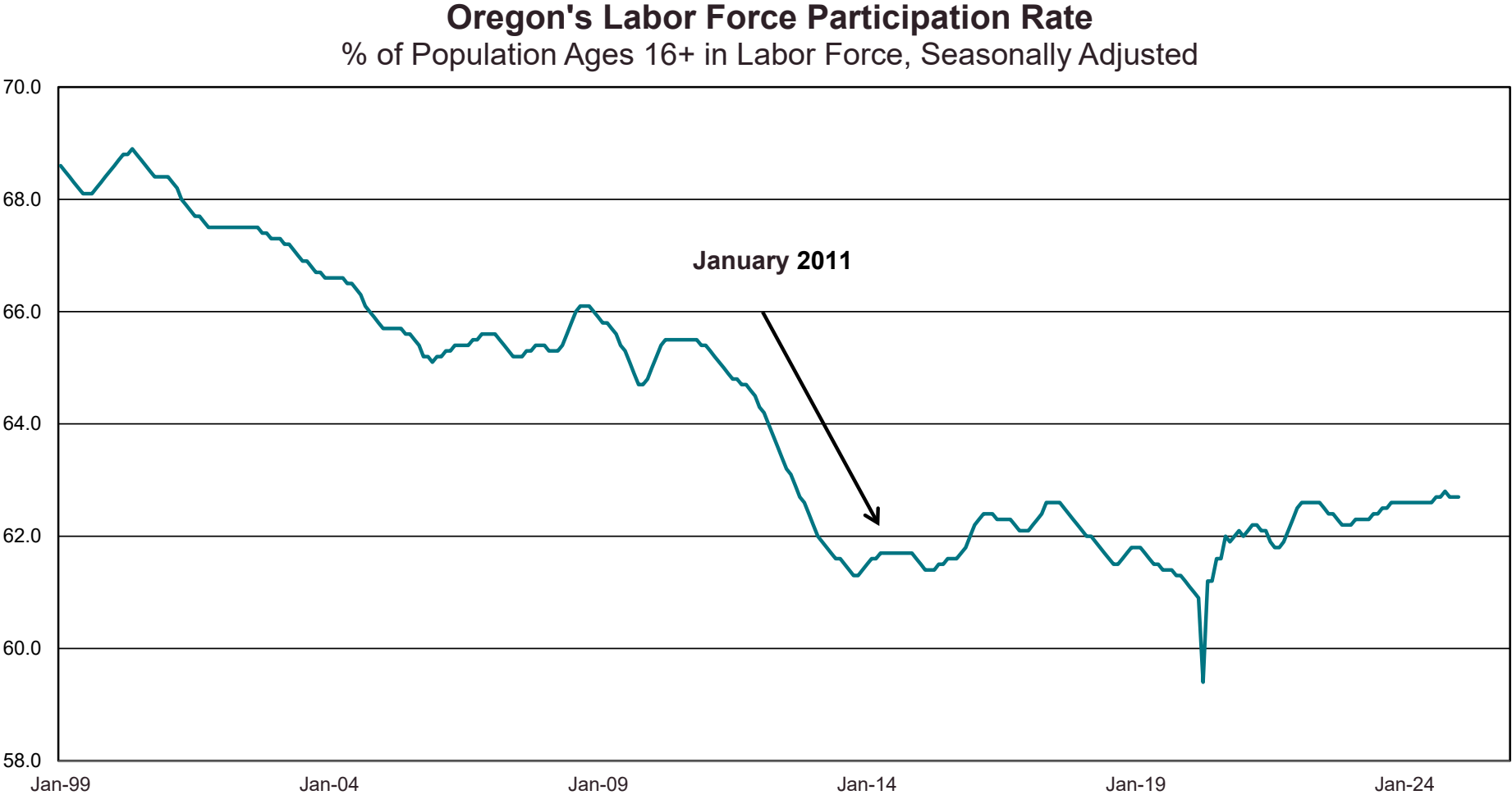


High
Hood River County
74.7%

Low
Curry County
44.0%

Source: Oregon Employment Department

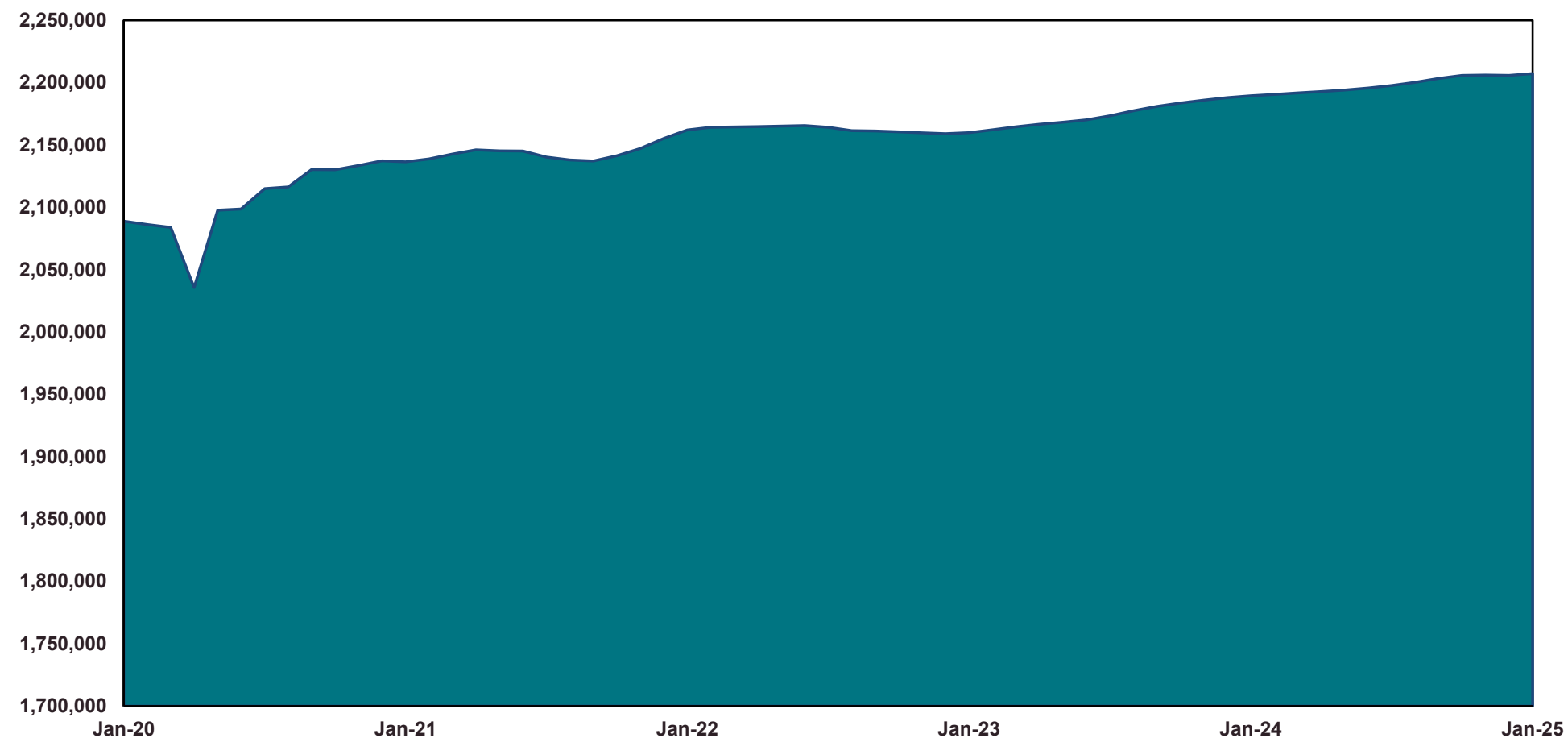
OREGON'S LABOR FORCE PARTICIPATION RATE WAS 62.7% IN JANUARY.



Source: Oregon Employment Department, Local Area Unemployment Statistics

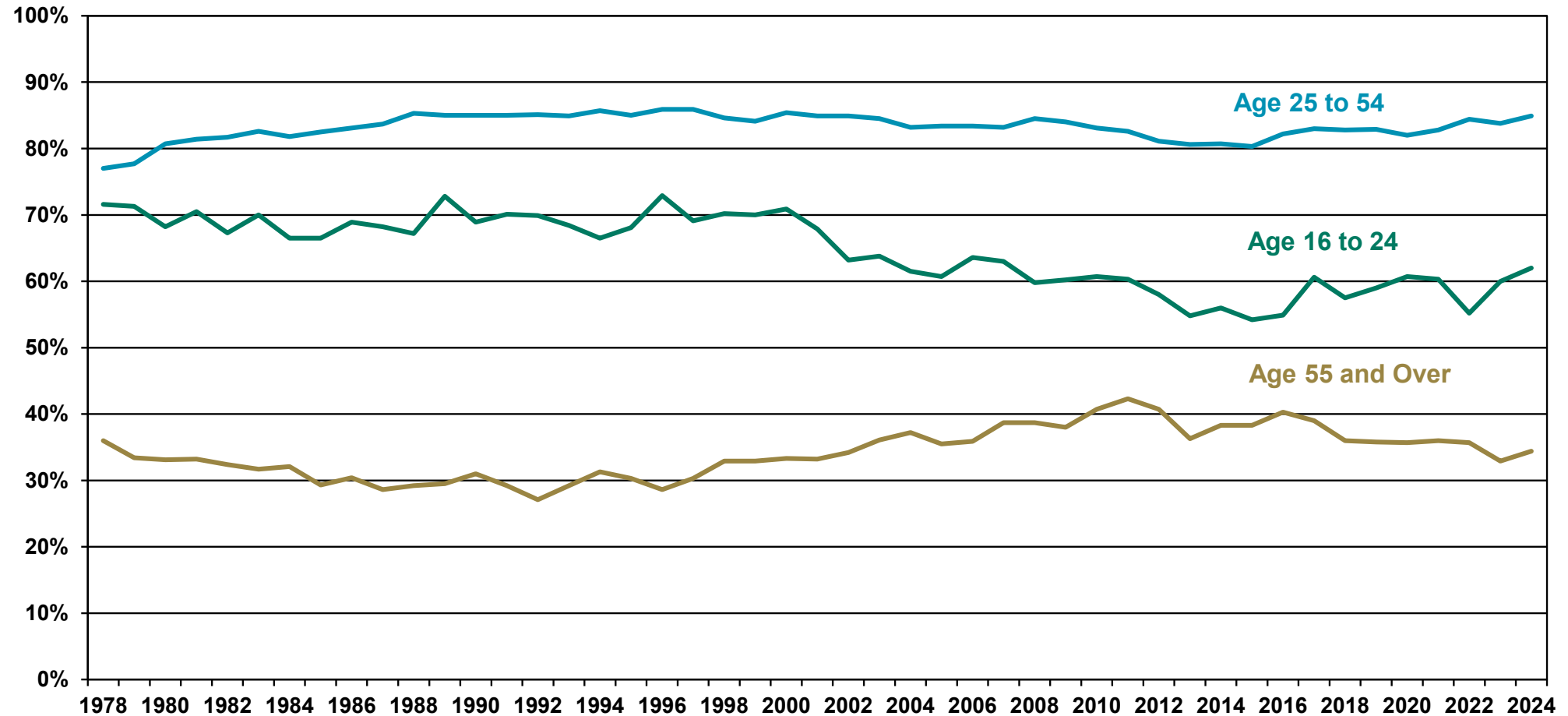
OREGON'S LABOR FORCE HAS BEEN STABLE IN RECENT MONTHS.

Oregon Civilian Labor Force, Seasonally Adjusted
2020 to Present



Source: Oregon Employment Department, Local Area Unemployment Statistics

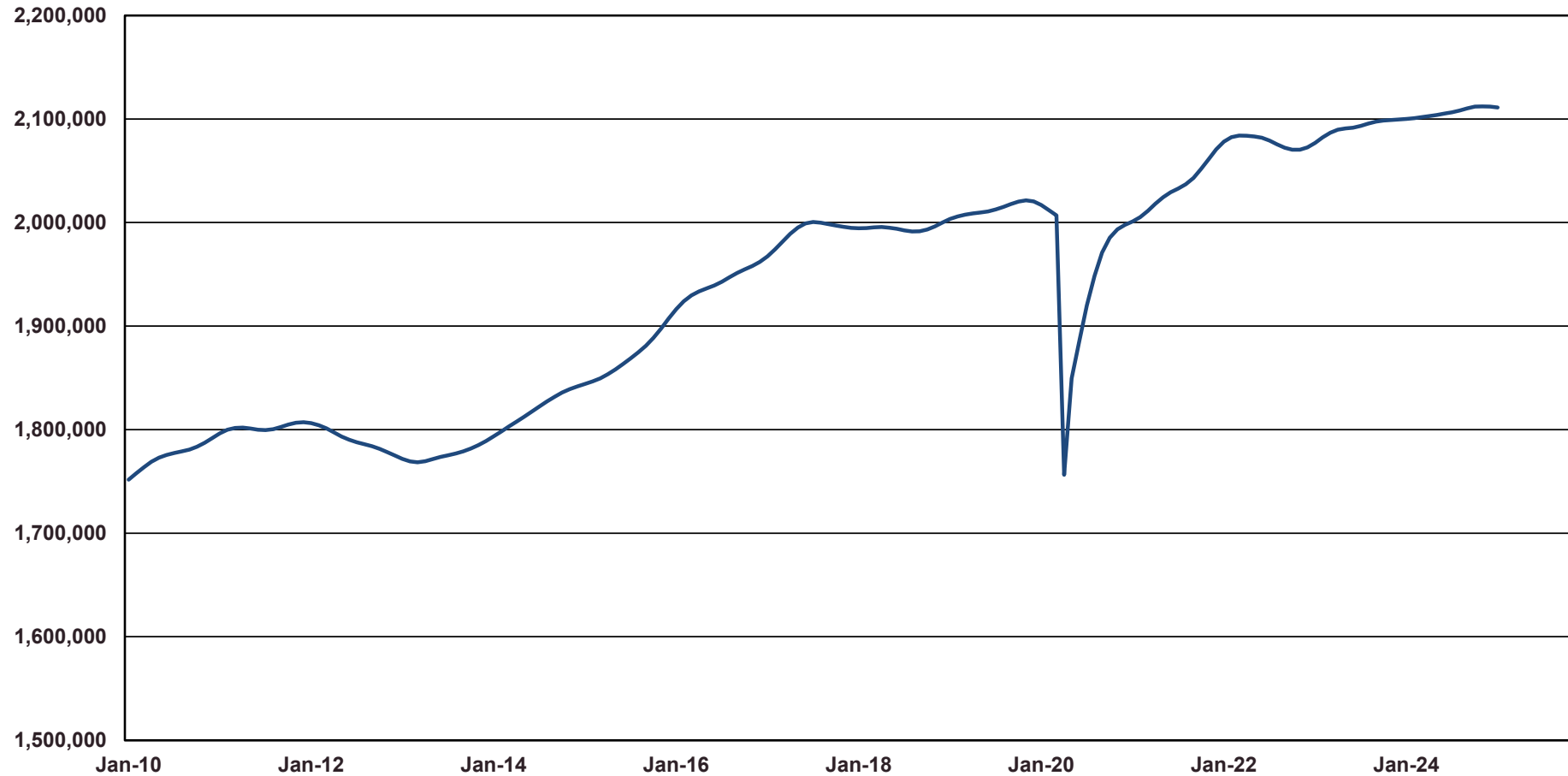
Oregon Labor Force Participation Rates by Age Group



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

TOTAL EMPLOYMENT HAS BEEN STABLE IN RECENT MONTHS

Total Employed, Oregon
Seasonally Adjusted, 2010 to Present



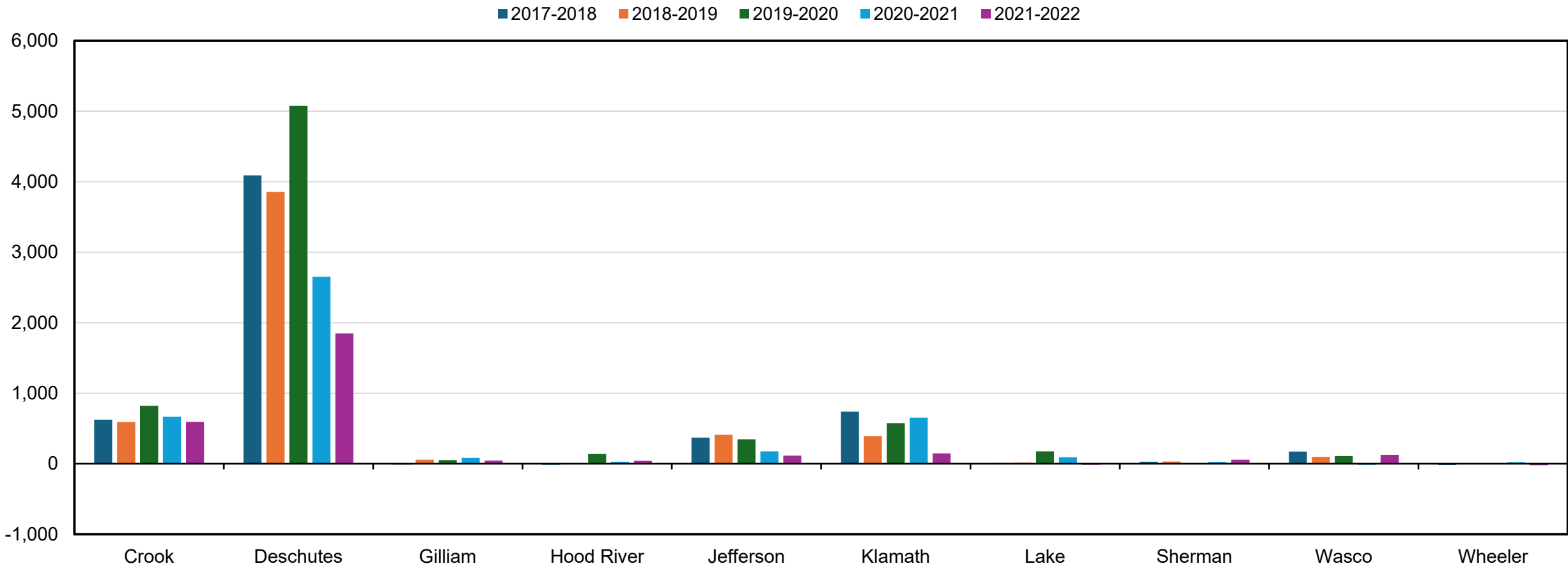
Includes farm jobs and the self-employed, based on place of residence. It includes Oregonians who work – physically or remotely – in Washington or elsewhere.

Source: Oregon Employment Department, Local Area Unemployment Statistics

(This is a different measure than total nonfarm employment)

NET MIGRATION INTO DESCHUTES AND CENTRAL OREGON LEADS EAST CASCADES

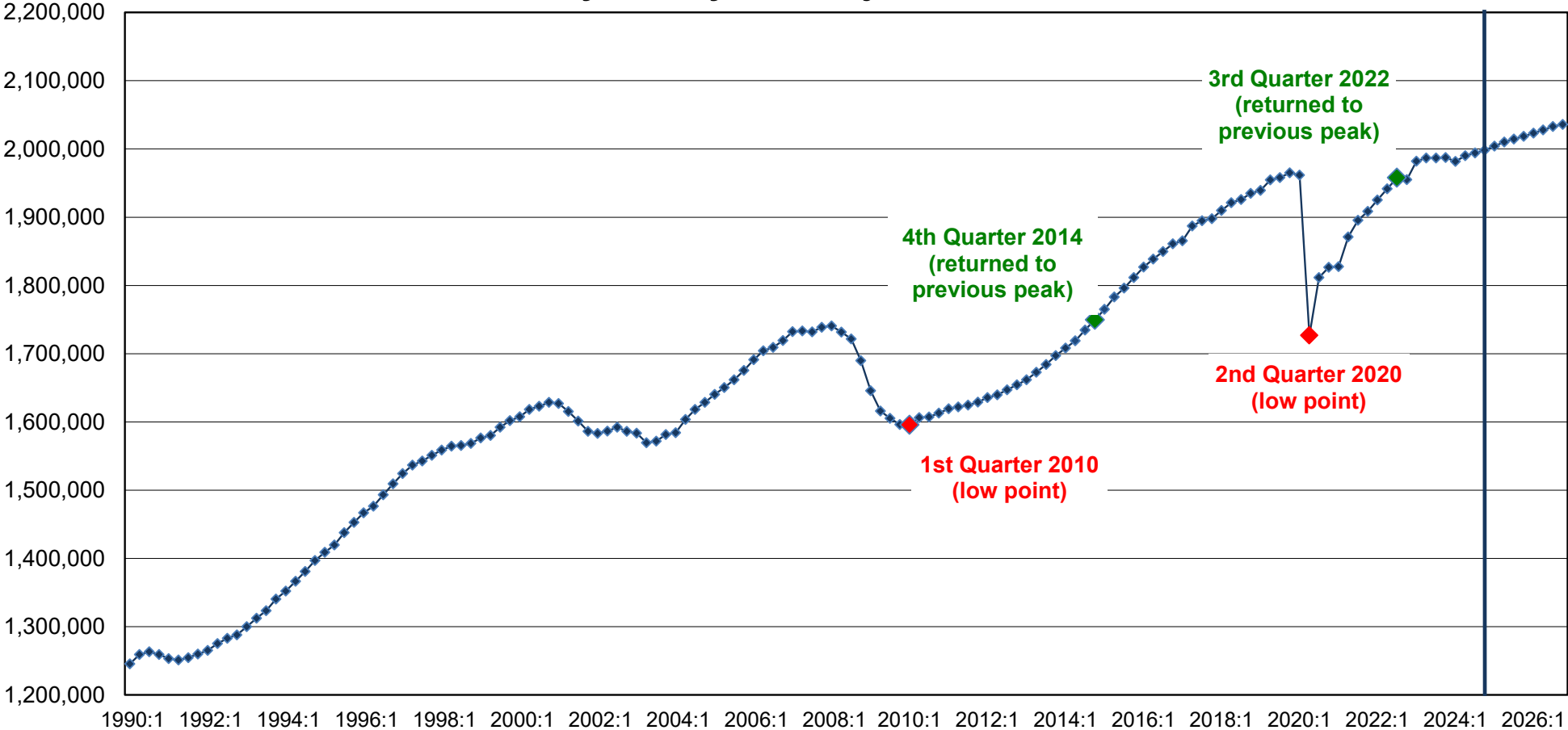
Net Migration for the East Cascades by Year



Source: Oregon Employment Department and Internal Revenue Service

PROJECTED GROWTH

Oregon Nonfarm Payroll Employment
Quarterly History and Projection, 1990-2026



Source: Office of Economic Analysis, Department of Administrative Services, December 2024

Oregon's total employment will grow by 8% between 2023 and 2033.

- Growth reflects structural growth, as total payroll employment had recovered from the pandemic recession by 2023.
- 170,000 new jobs over the decade.
- 265,000 average annual total job openings, mostly to replace workers who leave the labor force or transfer into significantly different occupations.

Health care and social assistance is projected to grow the fastest and add the largest number of jobs.

- Private health care and social assistance accounts for one out of every five new jobs in Oregon by 2033.

Construction is also projected to grow the fastest.

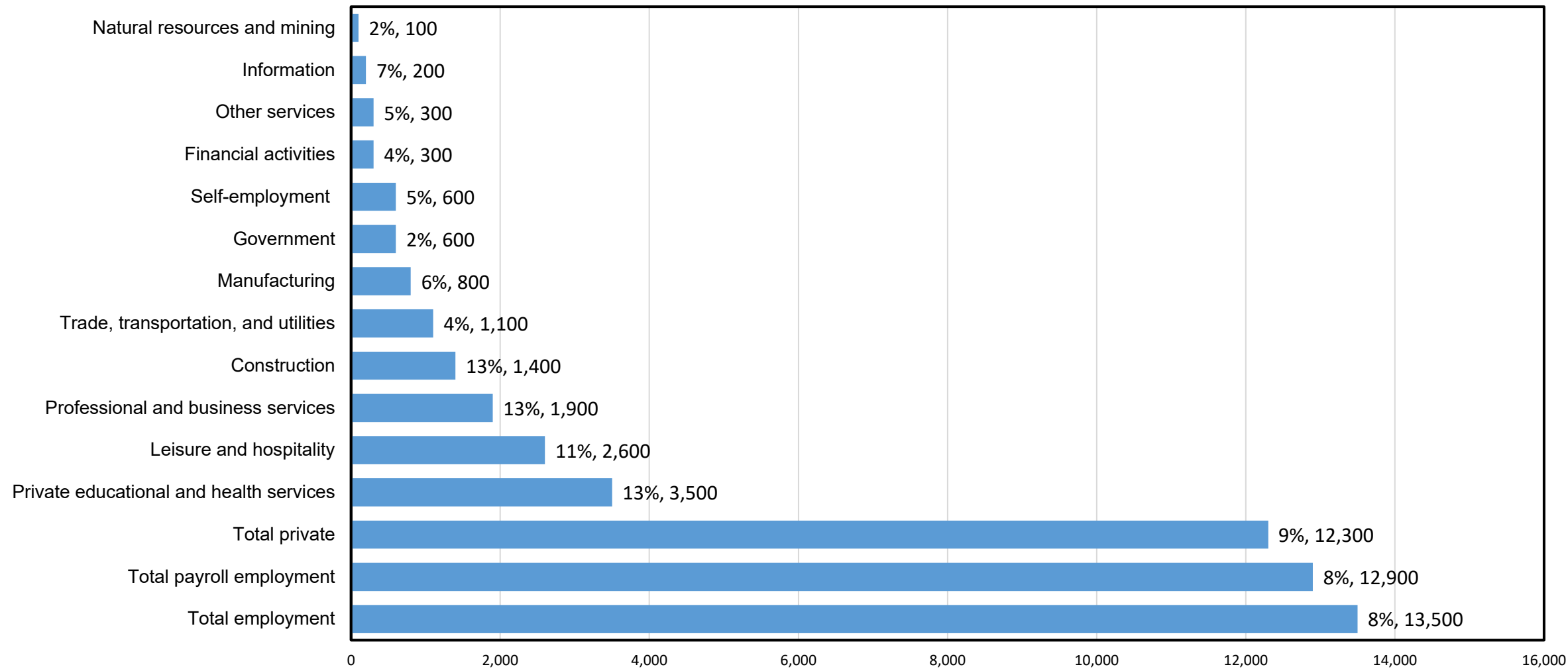
- Growth in construction is driven by strong projected growth in the specialty trades industry.

A broad array of future career opportunities exist across Oregon's economy.

- All sectors statewide and all regions of the state are expected to add jobs except for Federal government, which is projected to decline by 1%.
- Even slower-growing sectors and regions need an abundance of newly trained workers to replace those who retire or otherwise leave the labor force.

OED EXPECTS TOTAL EMPLOYMENT TO GROW 8% BY 2033

East Cascades Industry Employment Projections, 2023-2033



Source: Oregon Employment Department

COLUMBIA GORGE INDUSTRIAL EMPLOYMENT PROJECTIONS

Industry Employment Projections, 2023-2033 Gilliam, Hood River, Sherman, Wasco, and Wheeler Counties

	2023	2033	Change	% Change
Total employment	30,830	32,630	1,800	6%
Total payroll employment	28,070	29,830	1,760	6%
Total private	23,910	25,620	1,710	7%
Private educational and health services	4,340	4,860	520	12%
Health care and social assistance	4,110	4,590	480	12%
Leisure and hospitality	4,070	4,500	430	11%
Accommodation and food services	3,080	3,380	300	10%
Professional and business services	1,860	2,080	220	12%
Food services and drinking places	2,360	2,570	210	9%
Ambulatory health care services	1,130	1,310	180	16%
Trade, transportation, and utilities	4,510	4,670	160	4%
Arts, entertainment, and recreation	980	1,120	140	14%
Construction	1,080	1,210	130	12%
Natural resources and mining	3,770	3,860	90	2%
Nursing and residential care facilities	700	790	90	13%
Accommodation	720	810	90	13%
Manufacturing	2,360	2,440	80	3%
Transportation, warehousing, and utilities	730	800	70	10%
Nondurable goods	1,270	1,320	50	4%
Retail trade	3,170	3,220	50	2%
Government	4,160	4,210	50	1%
Wholesale trade	610	650	40	7%
Information	420	460	40	10%
Self-employment	2,760	2,800	40	1%
Other services	790	820	30	4%
State government	470	500	30	6%
Local government	3,140	3,170	30	1%
Durable goods	1,100	1,120	20	2%
Financial activities	710	720	10	1%
Mining and logging	80	80	0	0%
Federal government	550	540	-10	-2%
Local government education	1,540	1,470	-70	-5%

CENTRAL OREGON INDUSTRIAL EMPLOYMENT PROJECTIONS

Industry Employment Projections, 2023-2033 Crook, Deschutes, and Jefferson Counties

	2023	2033	Change	% Change
Total employment	114,760	124,630	9,870	9%
Total payroll employment	107,800	117,140	9,340	9%
Total private	93,940	102,970	9,030	10%
Private educational and health services	17,340	19,690	2,350	14%
Health care and social assistance	16,120	18,310	2,190	14%
Health care	13,130	15,040	1,910	15%
Leisure and hospitality	15,950	17,820	1,870	12%
Professional and business services	11,650	13,120	1,470	13%
Accommodation and food services	13,110	14,570	1,460	11%
Construction	8,690	9,860	1,170	13%
Trade, transportation, and utilities	18,800	19,590	790	4%
Manufacturing	8,180	8,820	640	8%
Self-employment	6,960	7,490	530	8%
Durable goods	5,570	5,990	420	8%
Retail trade	13,100	13,450	350	3%
Government	13,860	14,170	310	2%
Local government	10,920	11,190	270	2%
Transportation, warehousing, and utilities	2,790	3,040	250	9%
Other services	4,120	4,370	250	6%
Information	2,090	2,330	240	11%
Nondurable goods	2,610	2,830	220	8%
Financial activities	5,670	5,870	200	4%
Wholesale trade	2,910	3,100	190	7%
Wood product manufacturing	1,910	2,050	140	7%
State government	1,580	1,650	70	4%
Natural resources and mining	1,450	1,500	50	3%
Mining and logging	290	280	-10	-3%
Federal government	1,360	1,330	-30	-2%
Local government education	4,960	4,850	-110	-2%

SOUTH CENTRAL INDUSTRIAL EMPLOYMENT PROJECTIONS

Industry Employment Projections, 2023-2033 Klamath and Lake Counties

	2023	2033	Change	% Change
Total employment	28,790	30,630	1,840	6%
Total payroll employment	26,950	28,740	1,790	7%
Total private	20,730	22,290	1,560	8%
Private educational and health services	4,660	5,230	570	12%
Health care and social assistance	4,500	5,050	550	12%
Leisure and hospitality	2,800	3,120	320	11%
Accommodation and food services	2,610	2,900	290	11%
Government	6,220	6,450	230	4%
Local government	4,500	4,710	210	5%
Trade, transportation, and utilities	4,910	5,080	170	3%
Construction	1,210	1,370	160	13%
Professional and business services	1,730	1,890	160	9%
Manufacturing	1,920	2,020	100	5%
Durable goods	1,760	1,860	100	6%
Wood product manufacturing	1,430	1,490	60	4%
Retail trade	3,380	3,440	60	2%
Transportation, warehousing, and utilities	730	790	60	8%
Wholesale trade	800	850	50	6%
Self-employment	1,840	1,890	50	3%
Natural resources and mining	1,340	1,380	40	3%
Other services	1,070	1,110	40	4%
State government	770	810	40	5%
Food and beverage stores	730	760	30	4%
Local government education	2,460	2,480	20	1%
General merchandise stores	890	900	10	1%
Financial activities	950	960	10	1%
Mining and logging	110	110	0	0%
Nondurable goods	160	160	0	0%
Information	140	130	-10	-7%
Federal government	950	930	-20	-2%

Thank You!

Please scan the QR code for a short survey.



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