

Clackamas County Community Roundtable Discussion

EMPLOYMENT UPDATE

OCTOBER 14, 2025

AGENDA

- Unemployment and Job Recovery
- Demand for Workers
- Projected Employment Growth
- Size of Firms in Clackamas County

UNEMPLOYMENT & JOB RECOVERY

KEY FACTS FROM RECENT NEWS RELEASE

Oregon's unemployment rate was 5.0% in August and 4.9% in July.

- That was 1.4 percentage points higher than the recent low of 3.6% in spring 2023.
- Oregon's rate was also slightly higher than the U.S. unemployment rate of 4.3% in August.

Oregon nonfarm payroll employment rose by 6,900 jobs in August.

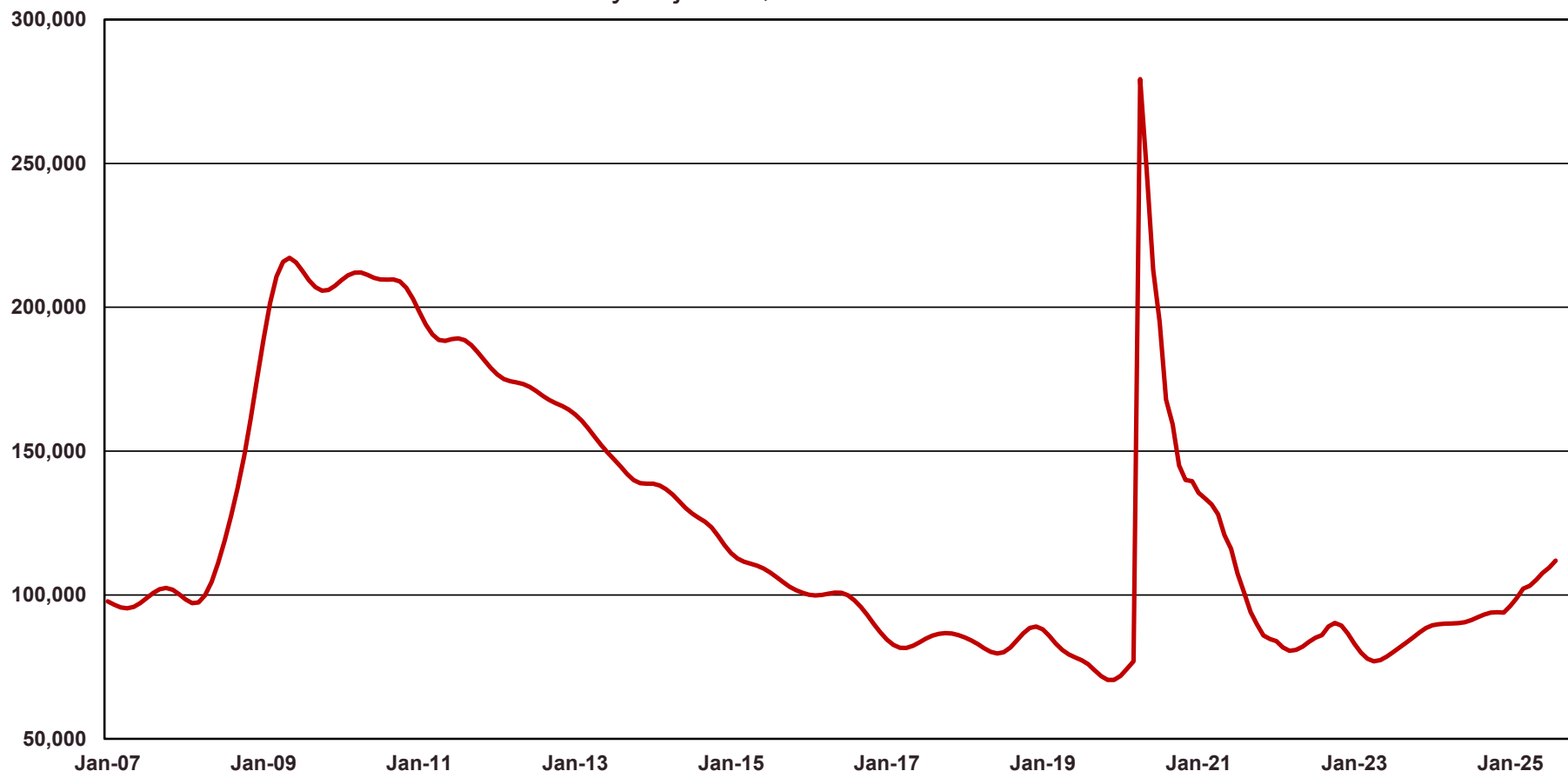
- August's gains were largest in health care and social assistance (+2,500 jobs); leisure and hospitality (+1,500); local government (+1,300); and other services (+1,000).
- Losses were largest in wholesale trade (-1,100 jobs).

Employers dropped 18,300 nonfarm payroll jobs over the past year, a loss of 0.9%.

- Wholesale trade declined rapidly in the past 12 months (-4,300 jobs, or -5.5%).
- Only two major industries expanded: health care and social assistance (+11,600 jobs, or 3.8%) and leisure and hospitality (+4,100 jobs, or 2.0%).

THE NUMBER OF UNEMPLOYED OREGONIANS INCREASED BY 2,396 IN AUGUST FROM JULY

Unemployed Persons, Oregon Statewide
Seasonally Adjusted, 2007 to Present



**Seasonally Adjusted
Unemployment:**

Pre-COVID Low
Nov 2019: 70,500

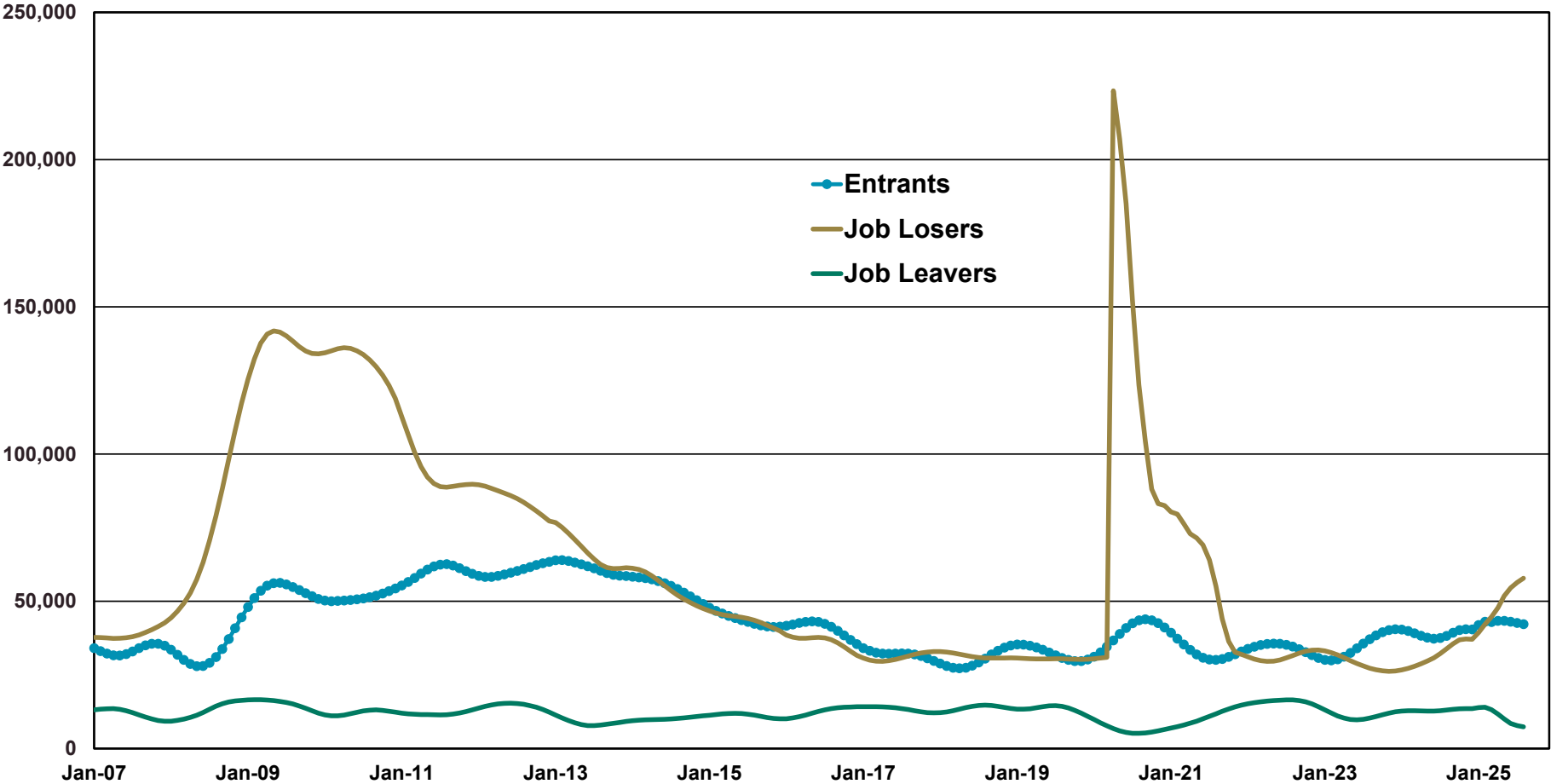
Highest
April 2020: 279,300

Current
August 2025: 111,900

Source: Oregon Employment Department, Local Area Unemployment Statistics

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



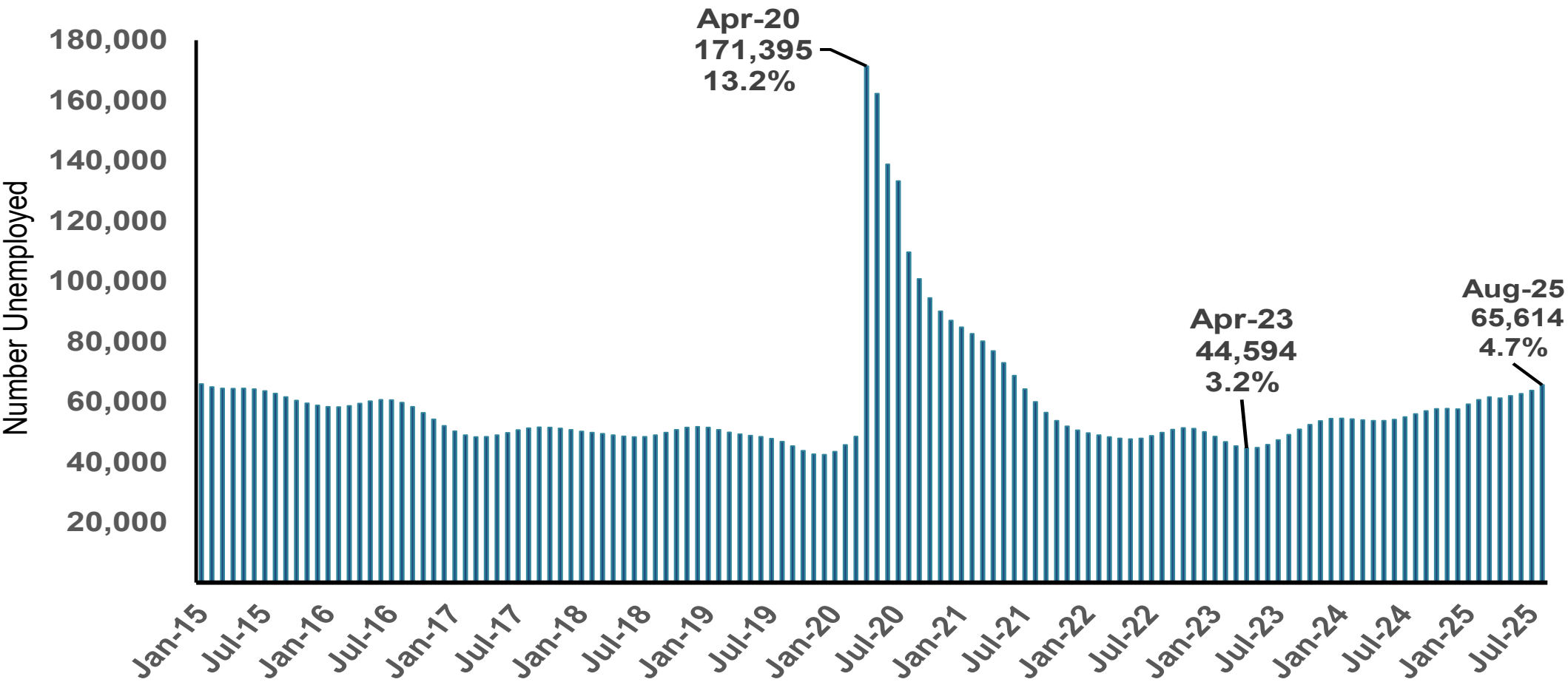
New or returning to the workforce
42,300 (39%)

Lost job
57,800 (54%)

Left job voluntarily
7,400 (7%)

Source: Oregon Employment Department, Current Population Survey

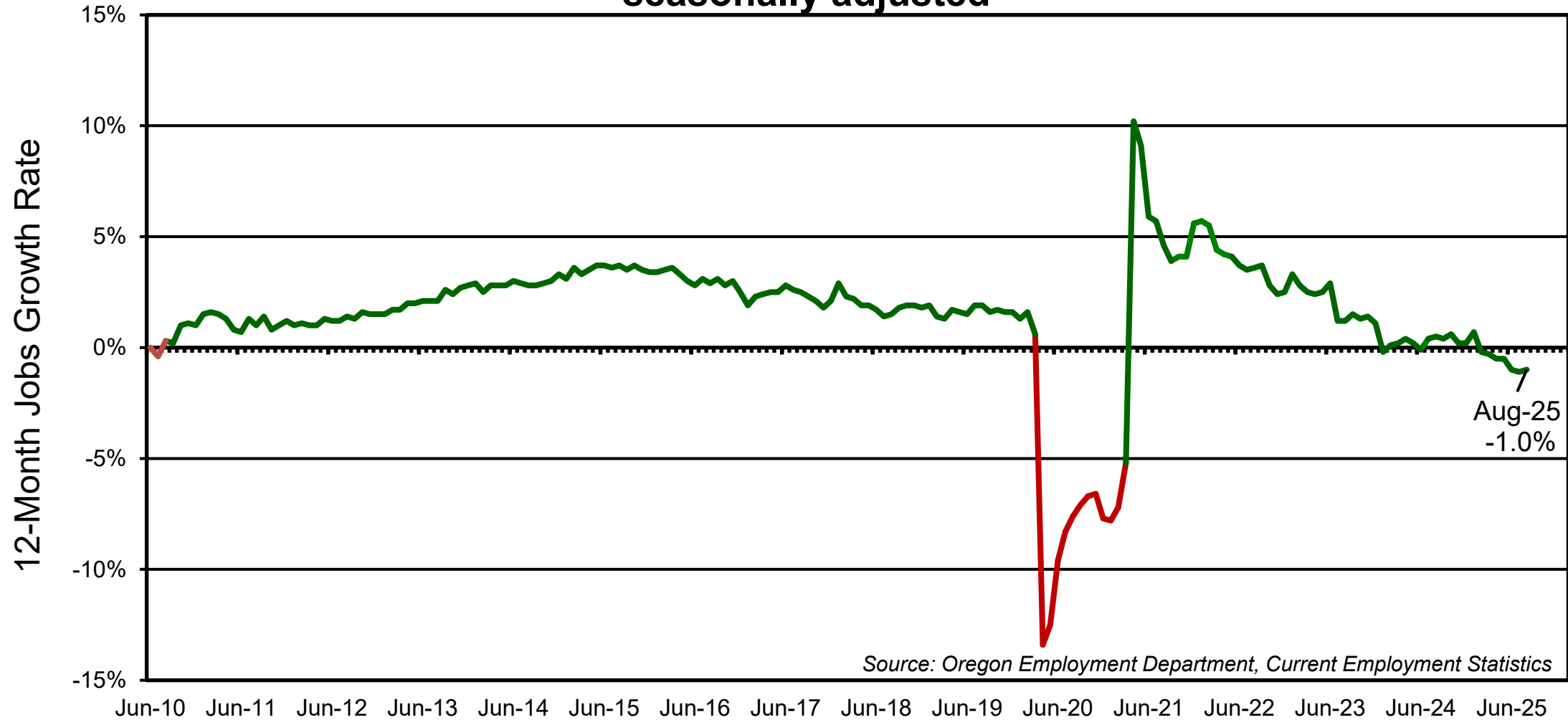
Unemployed Level, Portland-Vancouver MSA 2015-2025



Source: Oregon Employment Department, LAUS

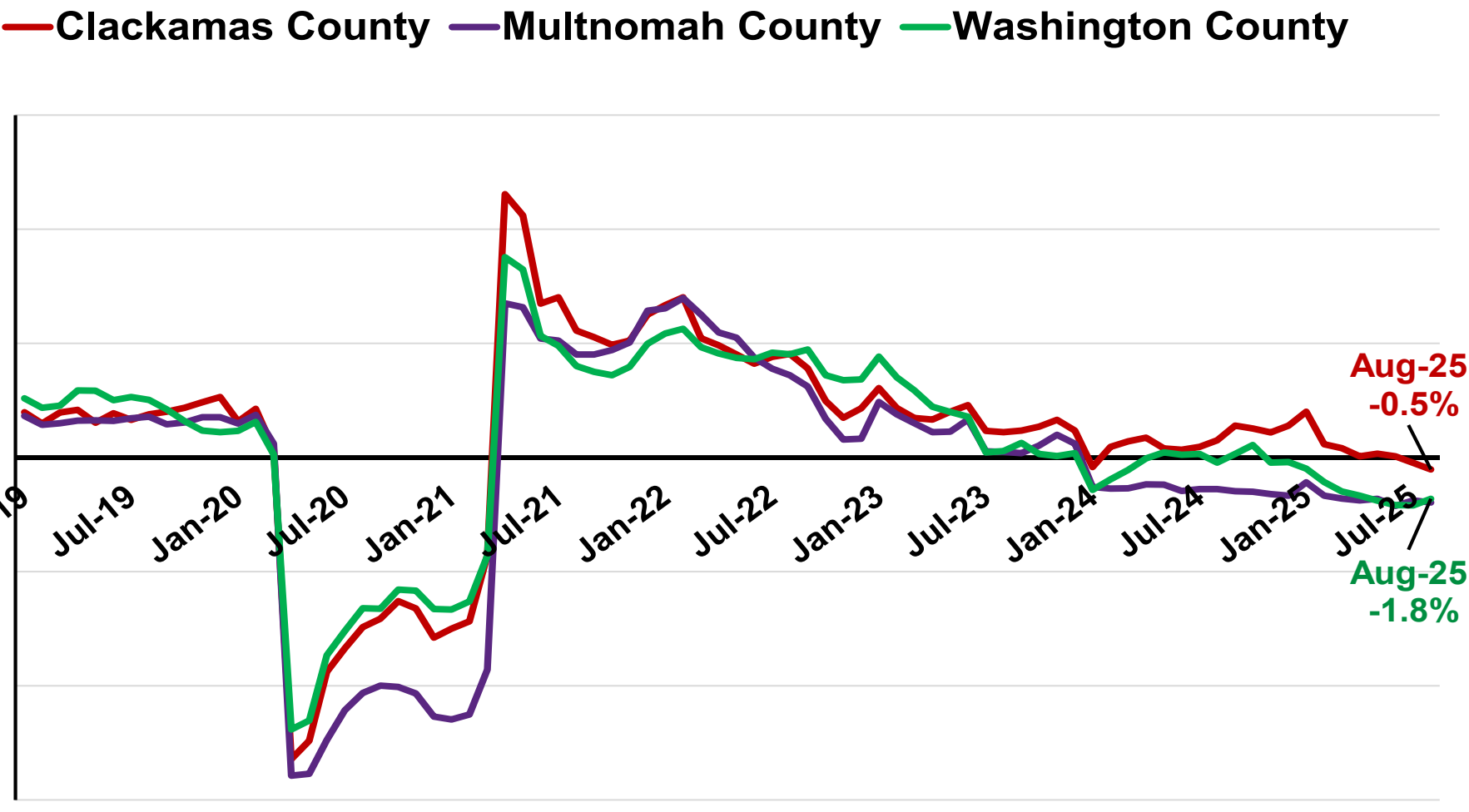
OREGON'S YEAR-TO-YEAR CHANGE IN EMPLOYMENT TURNED NEGATIVE IN FEBRUARY

Oregon's Year-Over-Year Percentage Change in Jobs
seasonally adjusted



NEGATIVE YEAR-TO-YEAR EMPLOYMENT GROWTH IN ALL PORTLAND TRI-COUNTIES

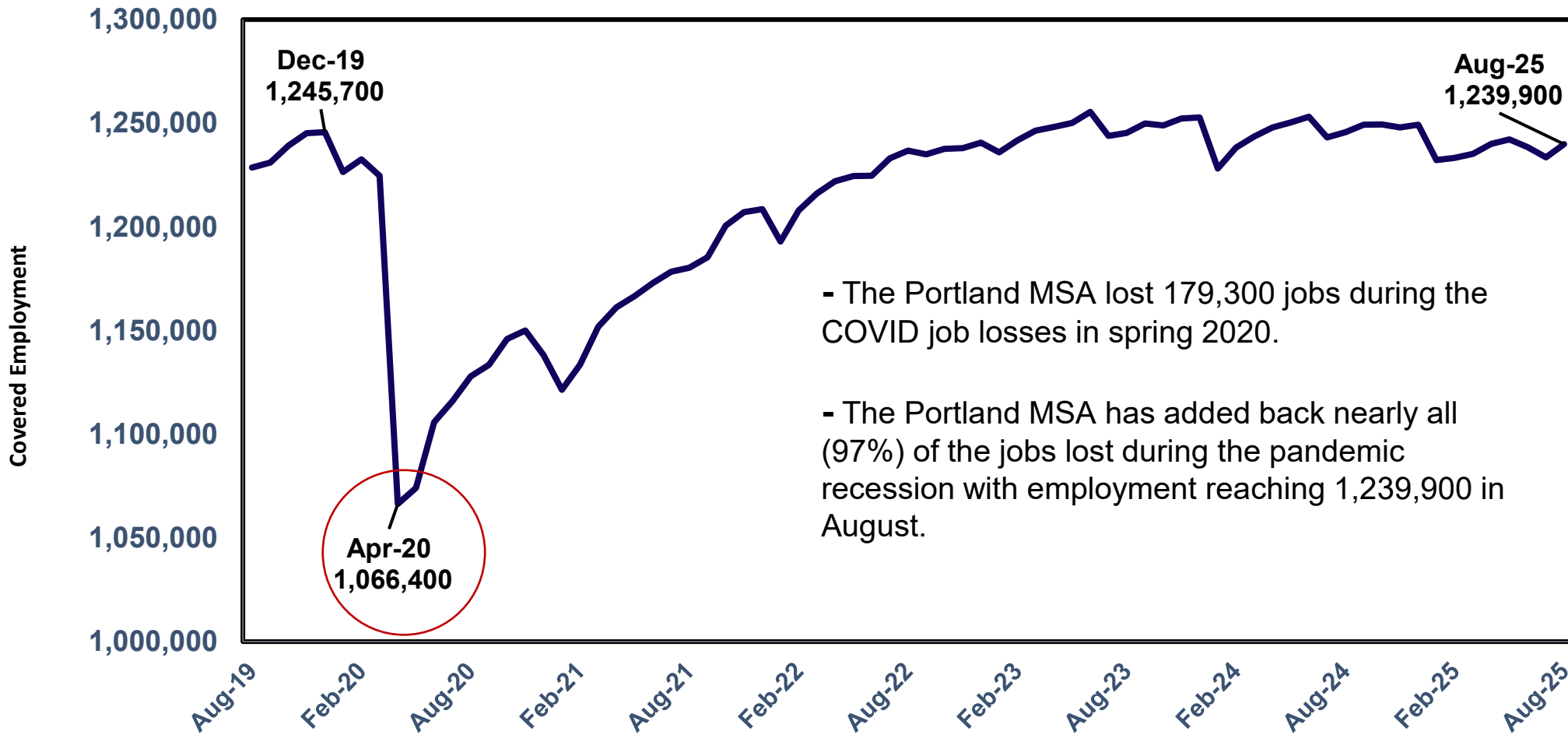
Year-to-Year % Employment Growth: 2019-2025
Clackamas, Multnomah and Washington Counties



Source: Oregon Employment Department, Current Employment Statistics

THE PORTLAND MSA HAS ADDED BACK 97% OF JOBS LOST DURING RECESSION

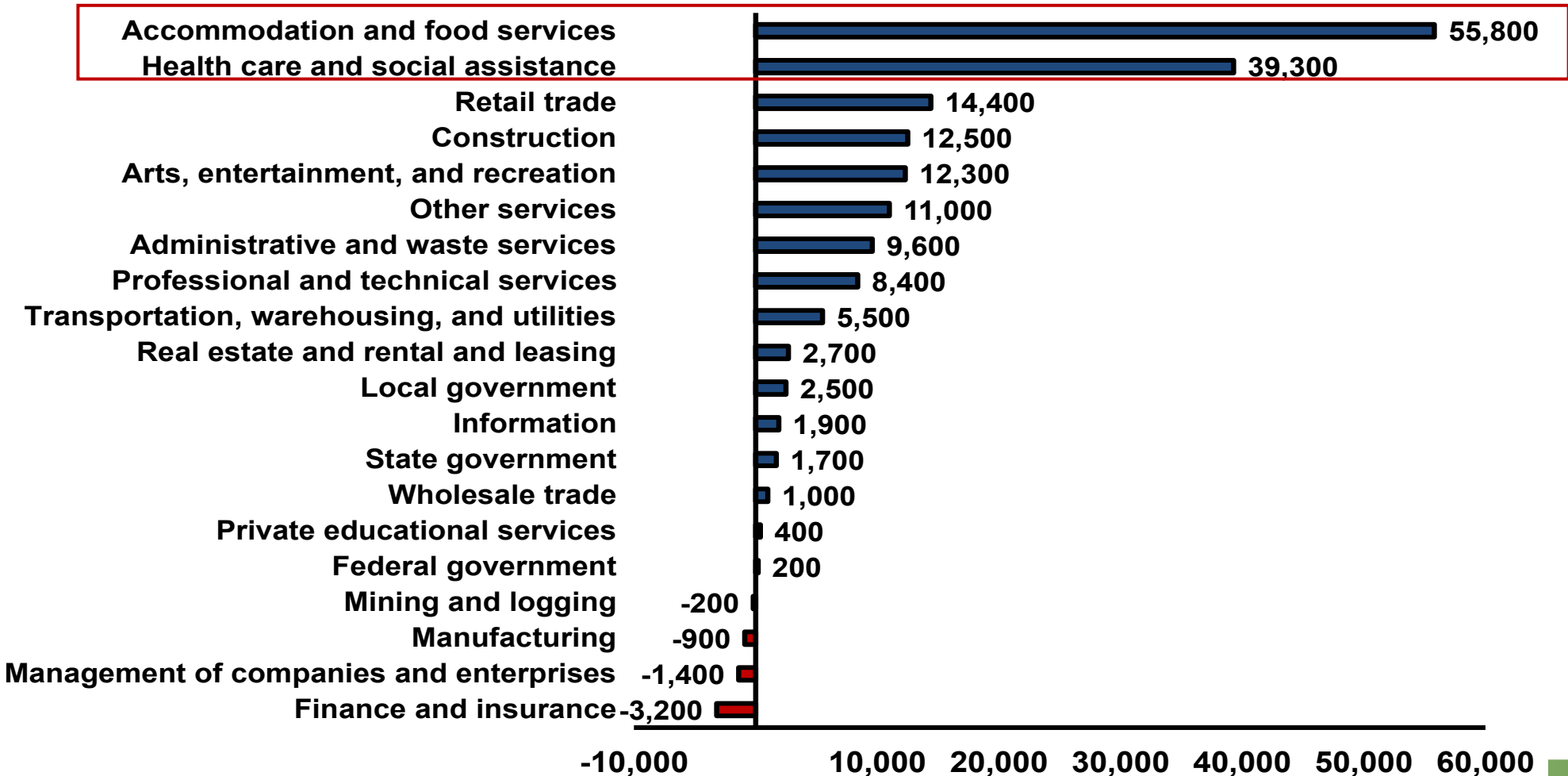
Monthly Nonfarm Employment: Portland MSA (OR-WA) August 2019 to August 2025 (not seasonally adjusted)



Source: Oregon Employment Department, Current Employment Statistics

MAJORITY OF PORTLAND MSA JOB RECOVERY WAS IN TWO BROAD INDUSTRIES

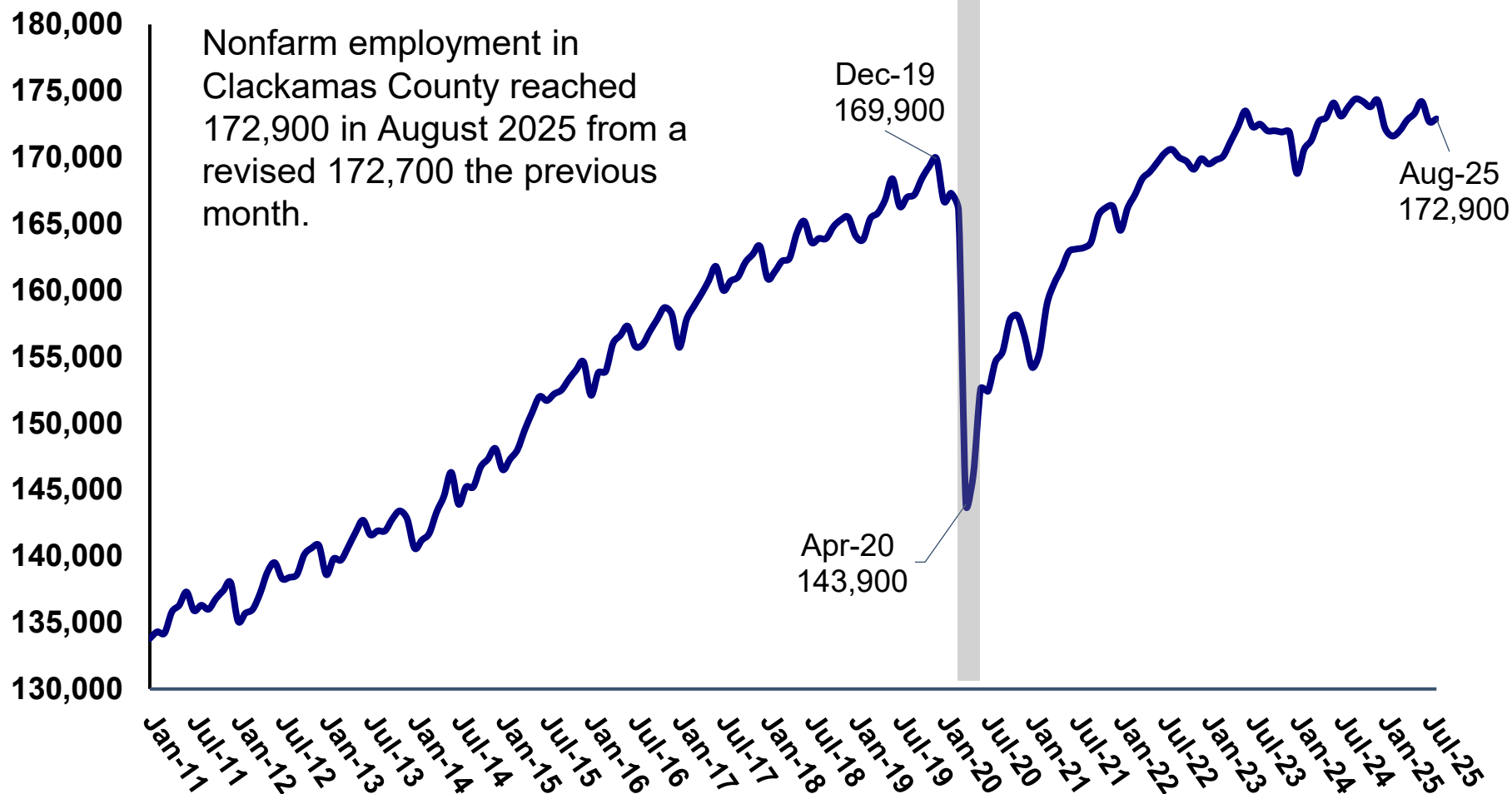
Employment Growth by Broad Industry since COVID Portland MSA: April-2020 to August-2025



Source: Oregon Employment Department, current employment statistics

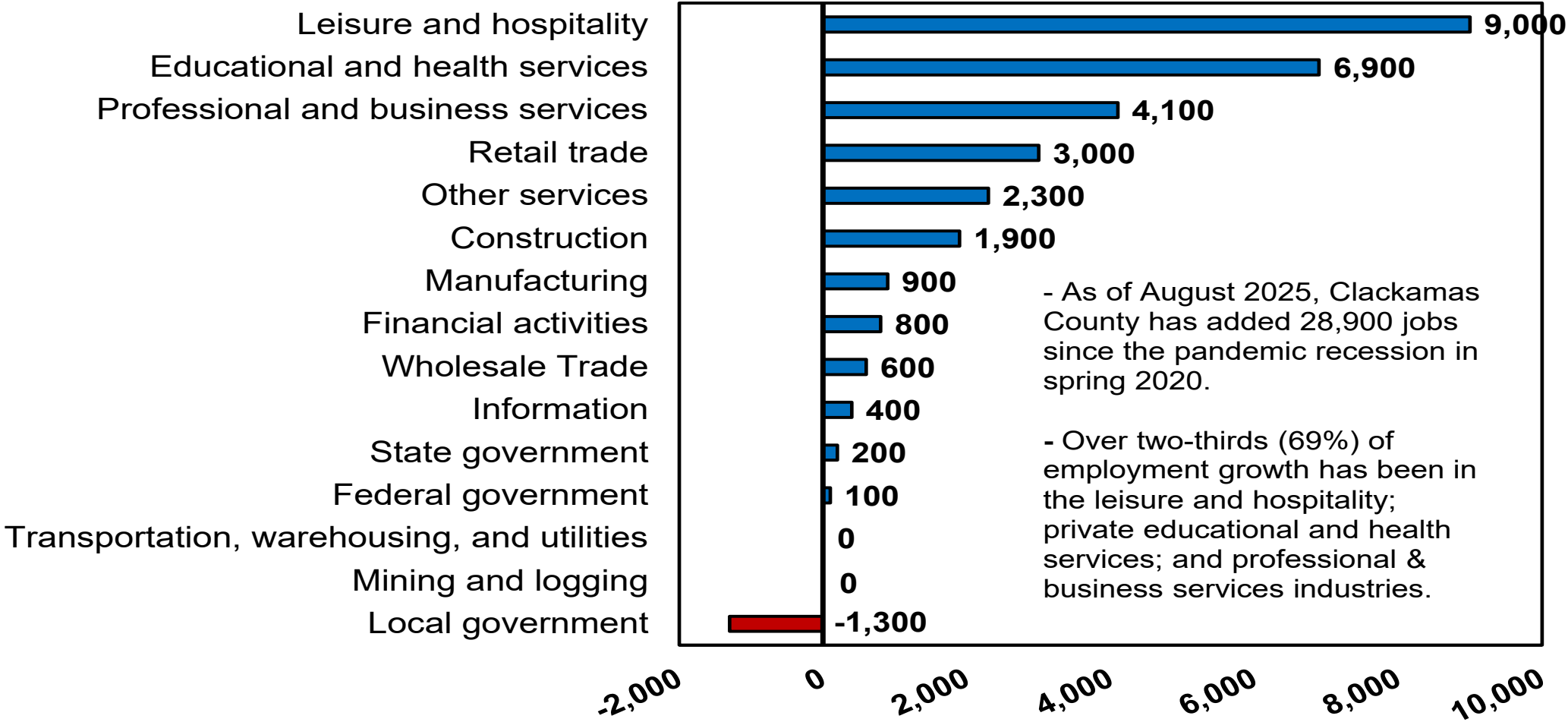
JOB RECOVERY IN CLACKAMAS ABOVE THE PRE-COVID LEVEL

Monthly Nonfarm Employment: Clackamas County January 2011 to August 2025 (by place of business)



Source: Oregon Employment Department, Current Employment Statistics (not seasonally adjusted)

**Industry Employment Growth in Clackamas County:
April-2020 (pandemic) to August-2025 (+28,900 jobs)**

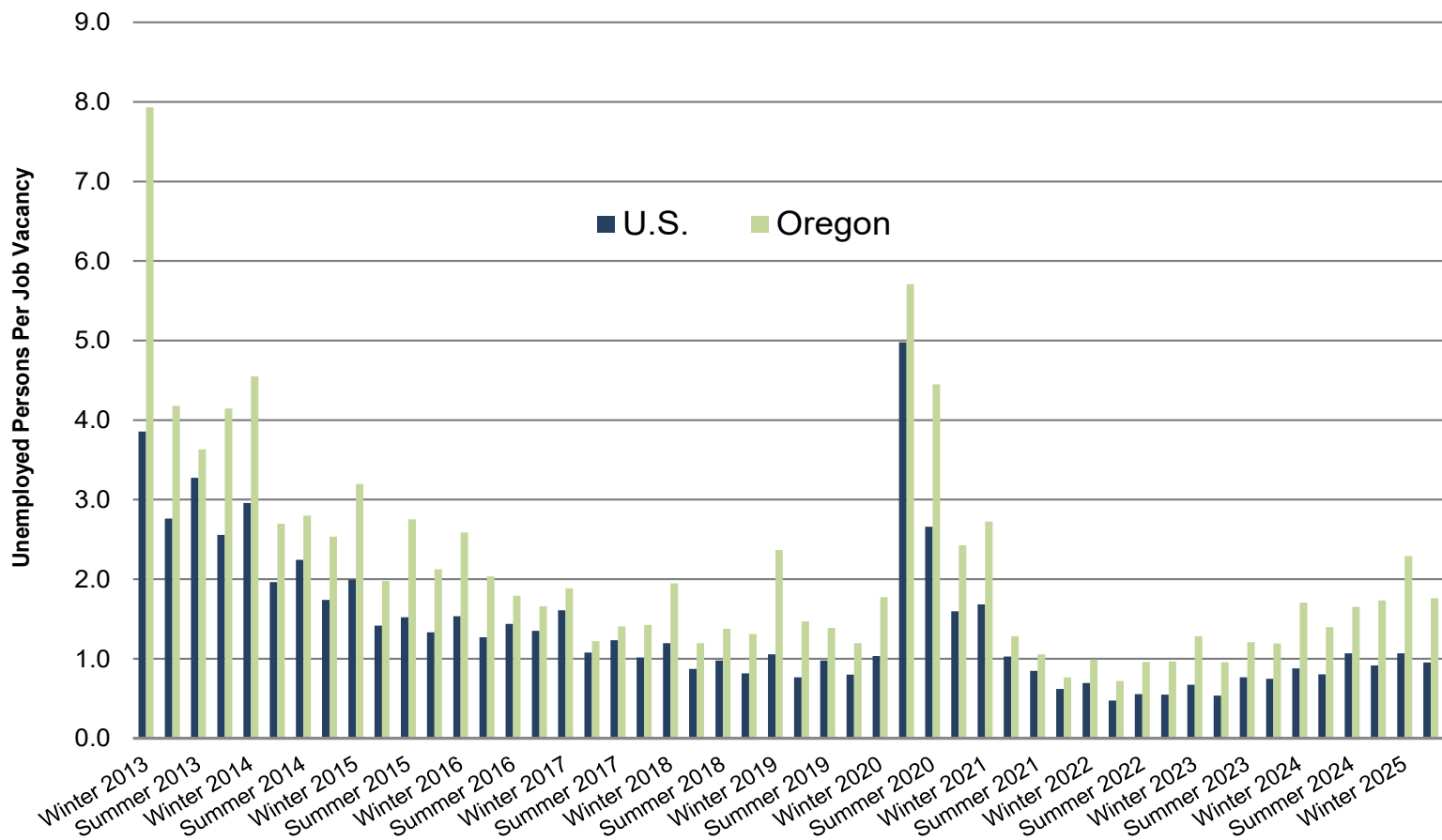


Source: Oregon Employment Department, Current Employment Statistics

WORKFORCE & DEMAND FOR WORKERS

OREGON HAS ROUGHLY TWO UNEMPLOYED PEOPLE PER JOB VACANCY. NATIONALLY, THE RATIO REMAINS NEAR 1-TO-1.

**U.S. and Oregon Unemployed to Job Vacancy Ratios Rising
Slowly after Record Lows**
(Job Openings with Private Employers, 2013-2025)



The U.S. ratio was around 1.0 in January 2025. It reached 5.0 in April 2020 after several years around 1-to-1. It has remained at or below 1.0 for 16 quarters.

Oregon had 1.8 unemployed per job vacancy in spring 2025, part of a steady rise since the post-pandemic recession expansion period in 2021 and 2022.

JOB VACANCY SURVEY

OREGON BUSINESSES REPORTED 51,048 VACANCIES IN SPRING 2025.

Oregon Private Job Vacancies Spring 2025

| | |
|---|---------------|
| Vacancies | 51,048 |
| Average Hourly Wage | \$28.38 |
| Full-time Positions | 79% |
| Permanent Positions | 94% |
| Requiring Education Beyond High School | 32% |
| Experience | 62% |
| Difficult to Fill | 58% |

Source: Oregon Employment Department

Oregon businesses reported 51,000 vacancies in spring 2025. Vacancies stayed flat from the winter and decreased 12% from spring 2024. Employers reported difficulty filling 58% of spring 2025 vacancies.

The average starting wage among this group of vacancies was \$28.38 per hour, an inflation-adjusted increase of 6% from spring 2024, and a 11% increase from winter 2025.

Characteristics of Oregon job vacancies were consistent with prior quarters. A typical job vacancy tends to be for a full-time, permanent position.

BUSINESSES REPORTED HIRING IN VARIOUS INDUSTRIES.

Oregon Private Job Vacancies by Industry, Spring 2025

| Industry | Vacancies |
|--|---------------|
| All Industries | 51,048 |
| Health care and social assistance | 11,108 |
| Professional, scientific, and technical services | 6,792 |
| Manufacturing | 6,696 |
| Retail trade | 5,705 |
| Leisure and hospitality | 4,384 |
| Other services | 3,262 |
| Construction | 2,835 |
| Management, administrative, and waste services | 2,788 |
| Wholesale trade | 2,562 |
| Financial activities | 2,435 |
| Transportation, warehousing, and utilities | 1,158 |
| Natural resources and mining | 1,157 |
| Private educational services | n/a |
| Information | n/a |

Unclassified industries excluded

Source: Oregon Employment Department

Health care and social assistance represented 22% of all vacancies, with 11,100. Professional, scientific, and technical services had 6,800 and manufacturing had 6,700.

Note: The Oregon Job Vacancy Survey includes only private-sector businesses with two or more employees.

THE PORTLAND TRI-COUNTY AREA REPRESENTED NEARLY 50% OF SPRING 2025 JOB VACANCIES.

Oregon Private Job Vacancies by Geography, Spring 2025

| Geography | Vacancies |
|-------------------------|---------------|
| Oregon Statewide | 51,048 |
| Portland Metro | 19,219 |
| Mid-Valley | 5,728 |
| Clackamas | 4,862 |
| East Cascades | 4,667 |
| Lane | 3,592 |
| Northwest Oregon | 3,484 |
| Rogue Valley | 3,265 |
| Southwestern Oregon | 2,868 |
| Eastern Oregon | 2,408 |

Spring vacancies were distributed across the state, with the Portland tri-county area (Portland Metro and Clackamas County) accounting for 47%.

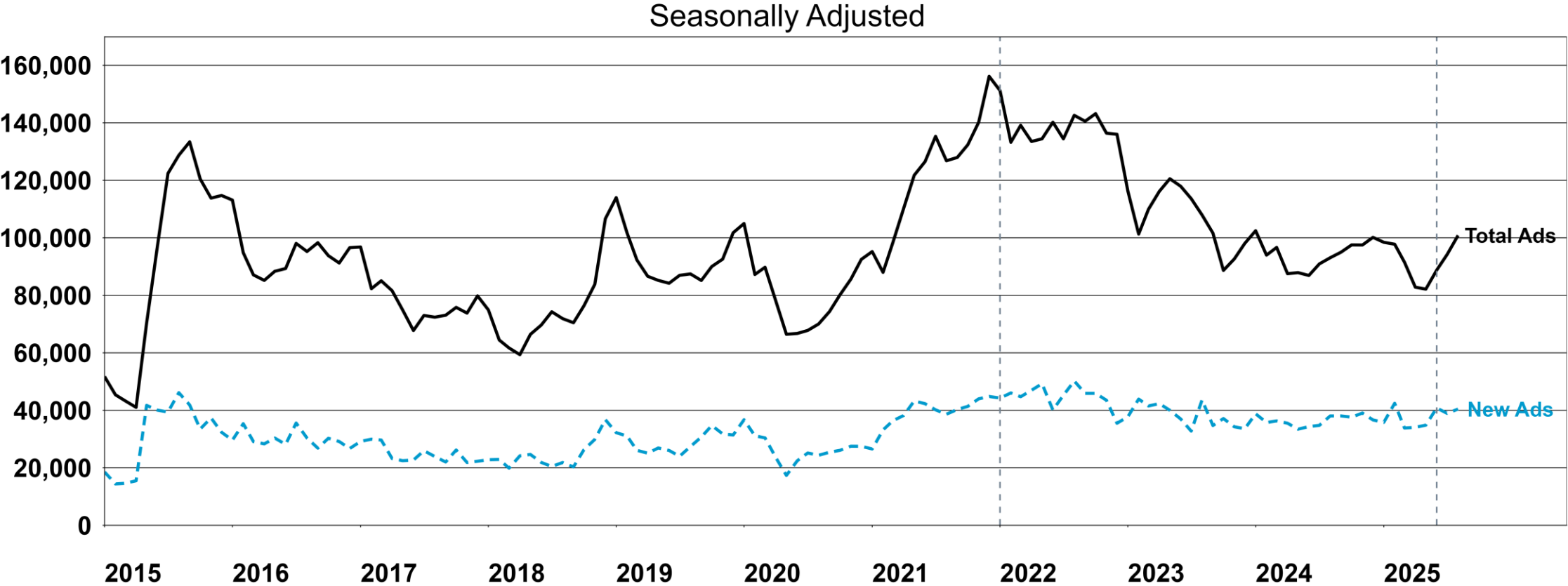
Multi-area or unknown regions excluded

Source: Oregon Employment Department

ONLINE JOB ADS

BOTH TOTAL ADS AND NEW ADS INCREASED IN OREGON IN AUGUST.

**The number of online ads in Oregon was 100,800 in August.
The number of new ads increased by 1,500 over the month.**



Source: The Conference Board Help Wanted OnLine® (HWOL)
Note: Dotted lines indicate methodological changes occurring in January 2022 and June 2025

Help Wanted Online Ads by County

August 2025, Not Seasonally Adjusted

| | | | | | |
|------------|--------|------------|-------|-----------|-----|
| Multnomah | 23,226 | Lincoln | 1,423 | Baker | 460 |
| Washington | 16,754 | Coos | 1,403 | Crook | 446 |
| Clackamas | 10,358 | Klamath | 1,292 | Jefferson | 398 |
| Marion | 9,656 | Josephine | 1,261 | Morrow | 379 |
| Lane | 8,148 | Polk | 1,207 | Curry | 320 |
| Deschutes | 6,189 | Clatsop | 1,204 | Harney | 149 |
| Jackson | 4,529 | Hood River | 736 | Wallowa | 120 |
| Linn | 2,197 | Columbia | 629 | Lake | 112 |
| Benton | 2,036 | Wasco | 610 | Grant | 111 |
| Douglas | 2,034 | Malheur | 598 | Sherman | 66 |
| Yamhill | 2,020 | Tillamook | 592 | Gilliam | 55 |
| Umatilla | 1,729 | Union | 554 | Wheeler | 19 |

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

PROJECTED JOB GROWTH

THE BIG PICTURE

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.

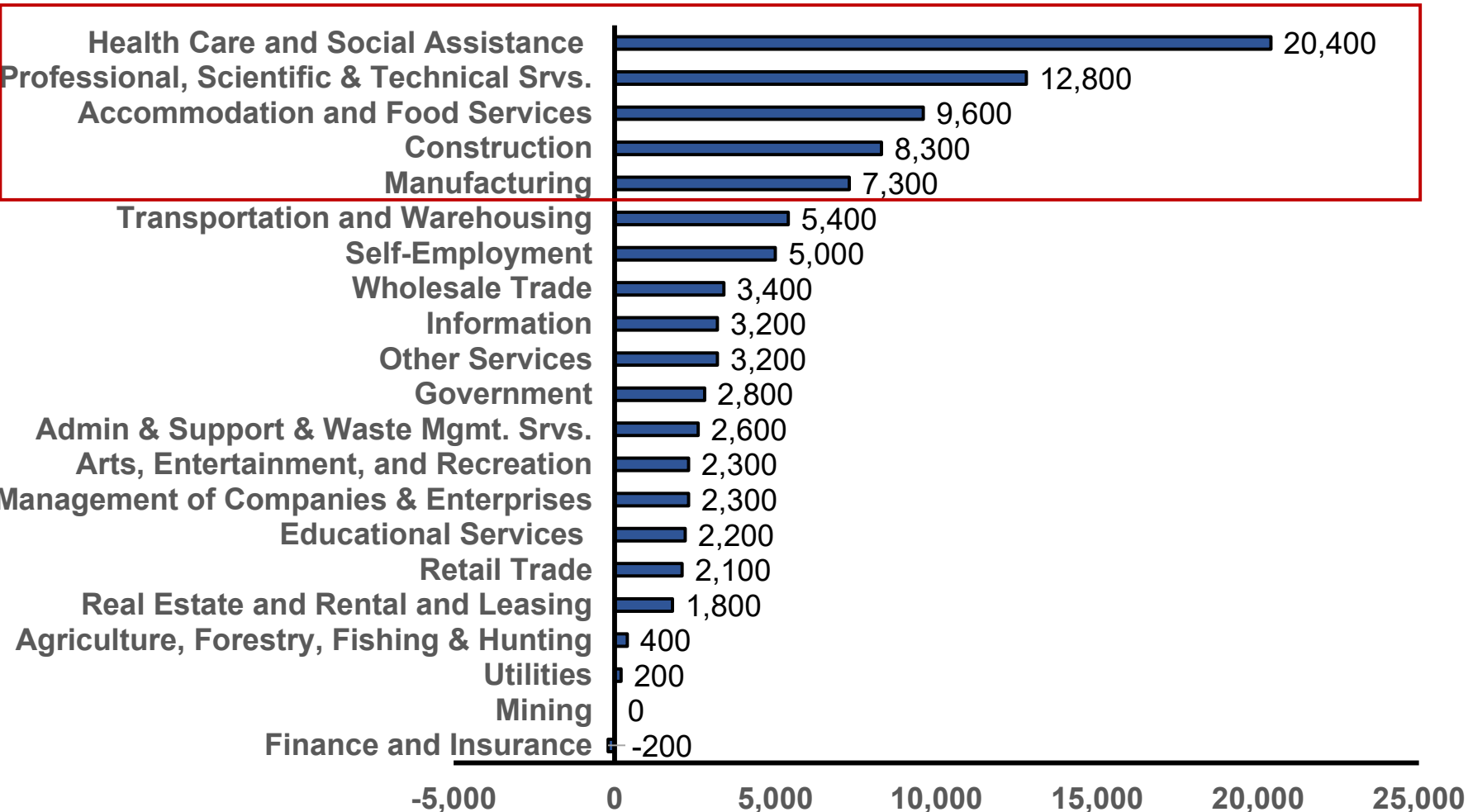
- Growth in construction is driven by strong projected growth in the specialty trades industry.

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.

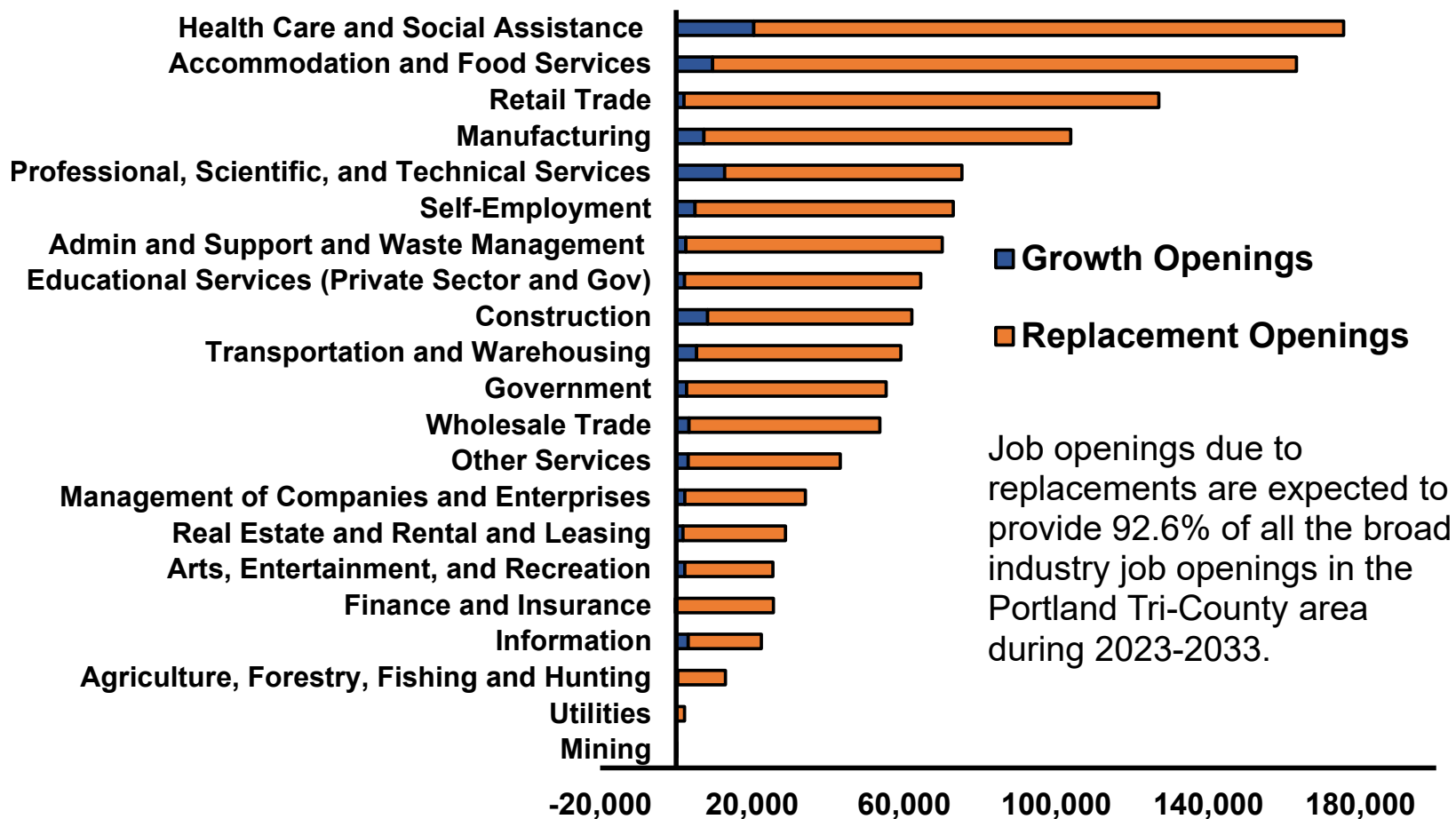
INDUSTRY EMPLOYMENT IN PORTLAND TRI-COUNTY EXPECTED TO GROW 9% BY 2033

Projected Industry **Employment Growth** (new jobs) Portland Tri-County: 2023-2033



- Five broad industries are expected to add nearly two-thirds (62%) of the new job growth:
 - Health care & social assistance
 - Professional, scientific & technical services
 - Accommodation & food services
 - Construction
 - Manufacturing

Broad Industry Projections: 2023-2033 Portland Tri-County

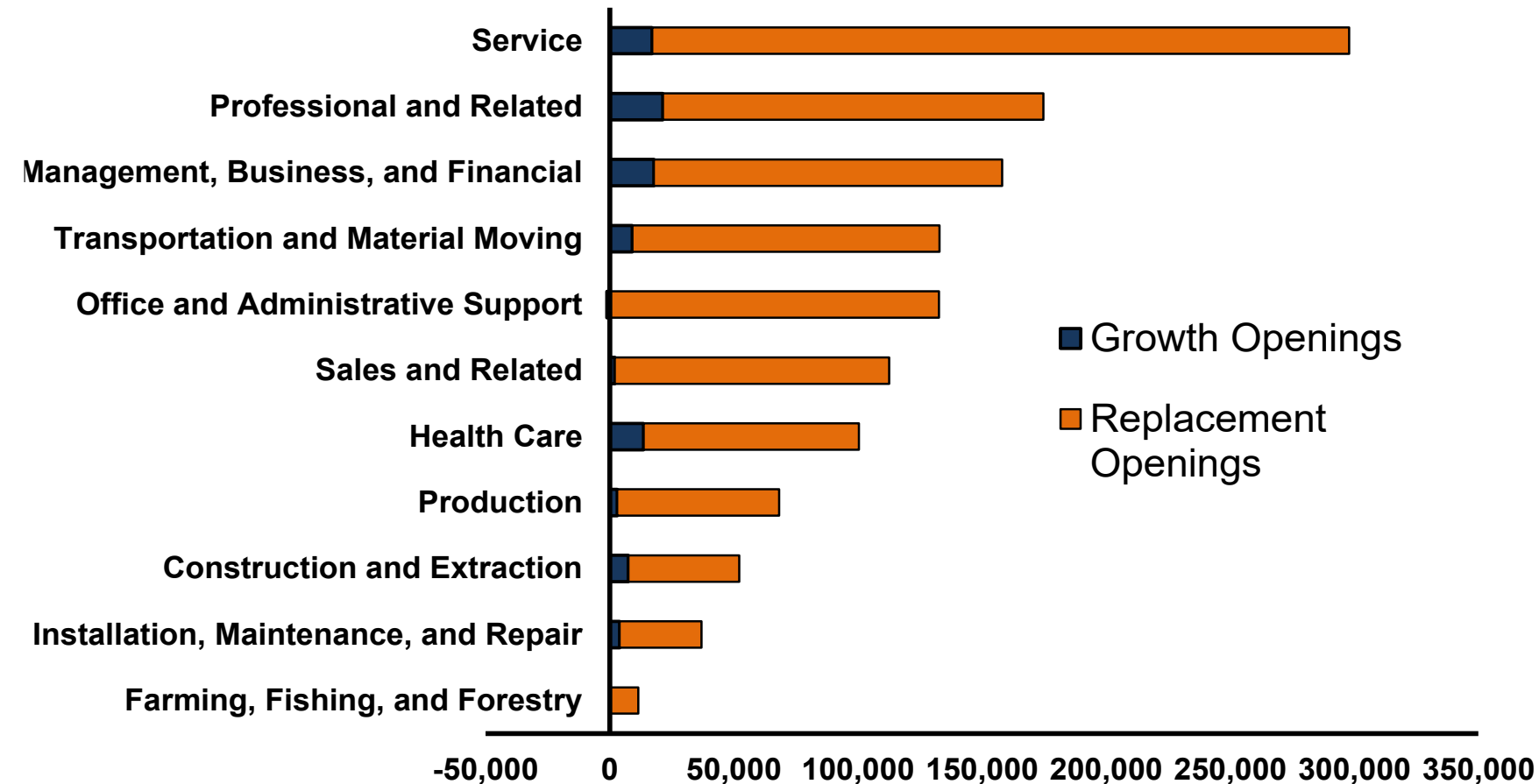


Source: Oregon Employment Department, Industry Projections: 2023-2033

- The majority or 93% of job openings in the Portland Tri-County area during 2023-2033 will be due to replacement openings caused by retirements and workers changing jobs.
- Four broad industries are expected to add the majority of the replacement openings:
 - Health care & social assistance
 - Accommodation & food services
 - Retail trade
 - Manufacturing

REPLACEMENT OPENINGS ARE EXPECTED TO MAKE UP THE MAJORITY OF JOB OPENINGS

Occupational Projections: 2023-2033 Portland Tri-County



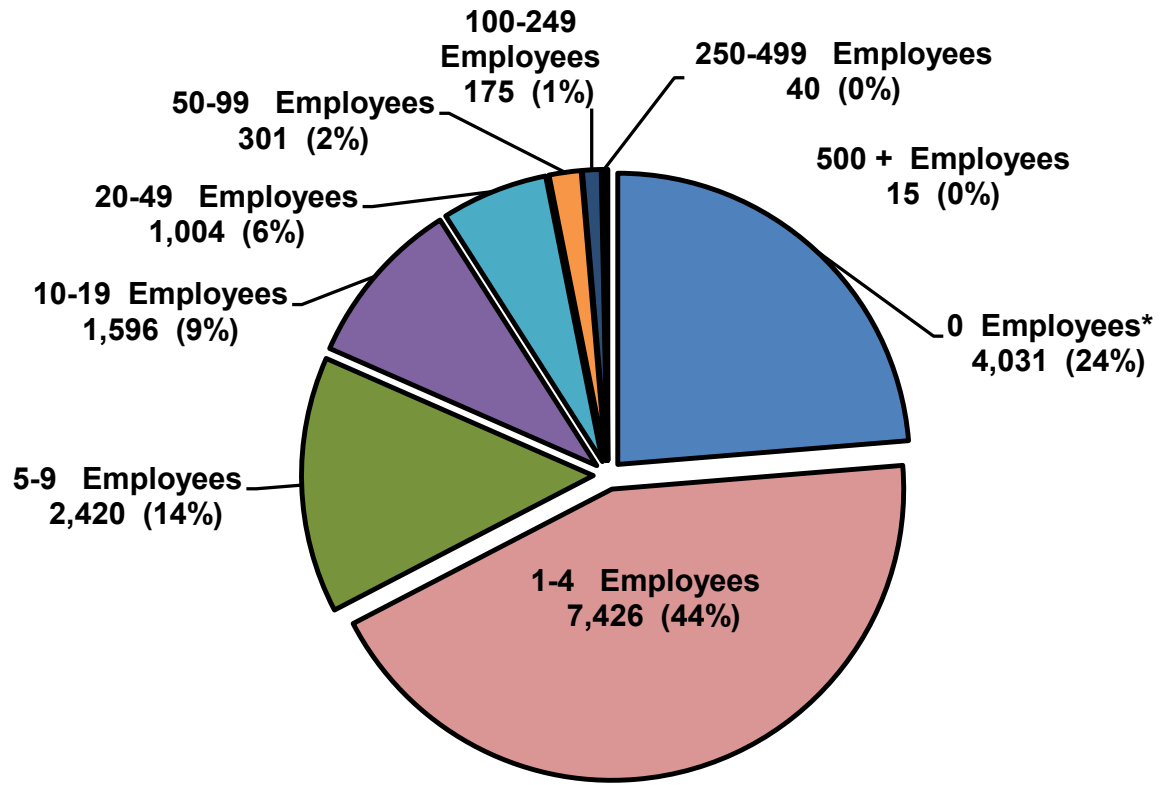
Source: Oregon Employment Department, Oregon Occupational Projections, 2023-2033

- Occupational Projections in the Portland Tri-County area show an expected 94,663 new job openings along with 1,182,911 replacement openings from 2023-2033.
- Replacement openings are expected to make up the majority (92.6%) of the total job openings in the Portland Tri-County by 2033.

SIZE OF FIRMS

SIZE OF FIRMS: FOCUS ON EMPLOYERS

**Number of Employer Businesses by Establishment Size
Clackamas County: 2025/Q1**

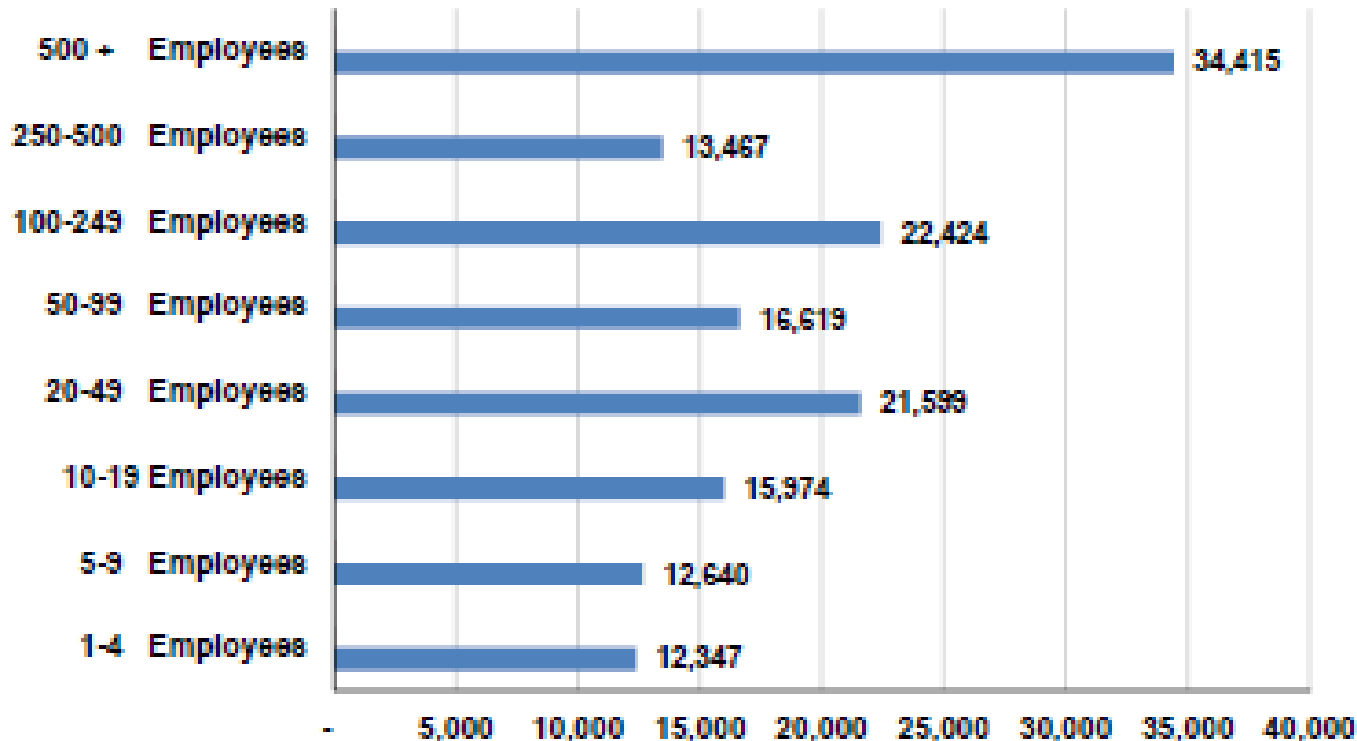


Source: Oregon Employment Department, QCEW 2025/Q1, private industry only. *Zero employees within a quarter occurs when employer reports zero employees in the month of March.

- Clackamas County had a total of 17,000 private-industry employer businesses during first quarter 2025 and these businesses employed nearly 149,500 workers.
- Employers with zero employees numbered over 4,000 establishments in first quarter 2025. These employers were shown with zero employees because they reported zero employees in the month of March.
- Sixty-seven percent of all employers in the county had between one and 19 employees and numbered over 11,400 establishments.
- Mid-sized firms, with 20-99 employees, made up 1,300, or 8%, of all employers in the county.
- Large firms, with 100 or more employees, consisted of 230 firms making up only 1.4% of all private employer establishments in first quarter 2025. While small in quantity, these firms made up nearly one-half (47%) of private industry employment.

SIZE OF FIRMS: FOCUS ON JOBS

Private Industry Employment by Establishment Size
Clackamas County: 2025/Q1



Source: Oregon Employment Department, QCEW 2025/Q1

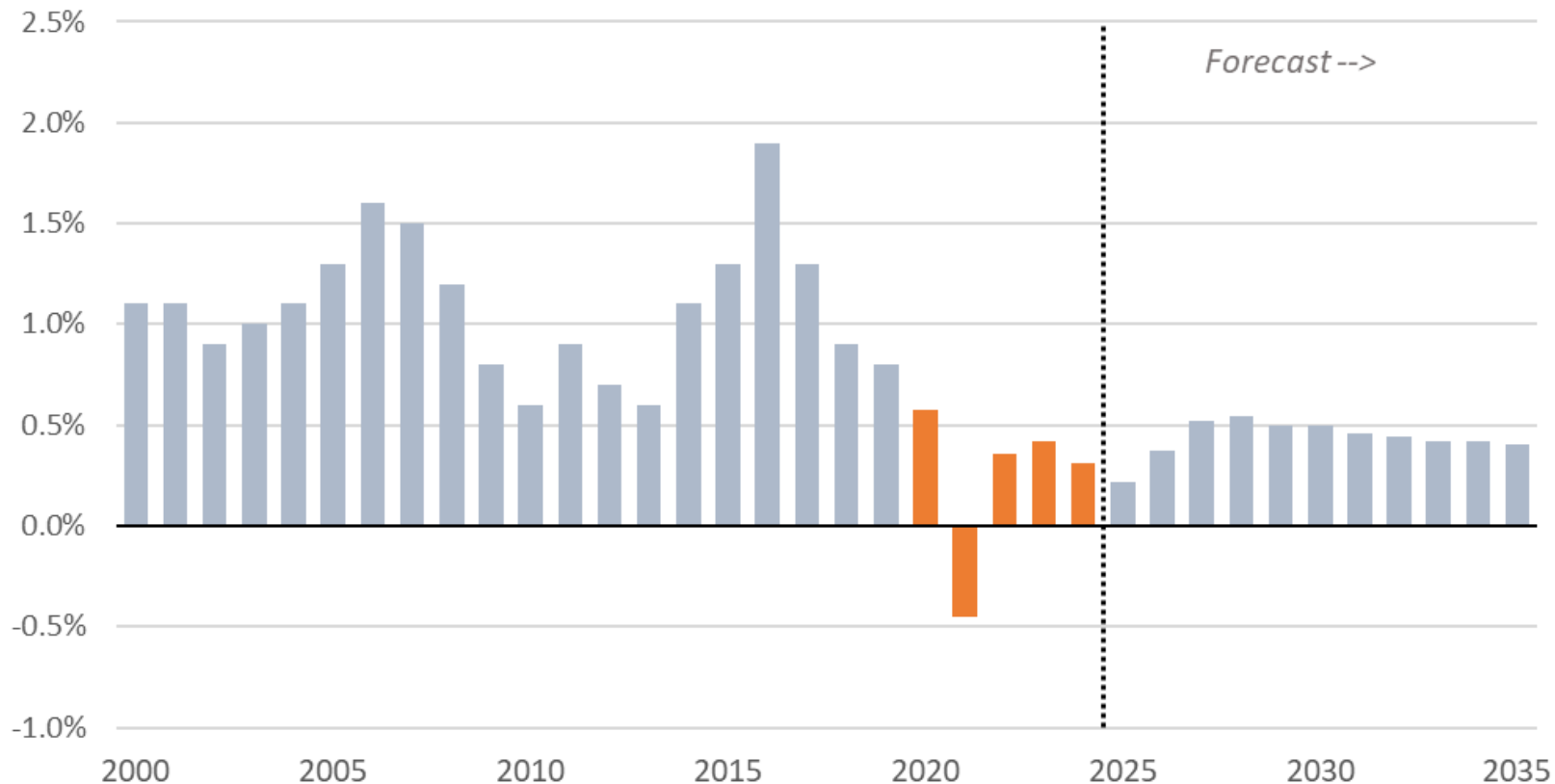
- Private-sector employers in Clackamas County provided almost 149,500 jobs in first quarter 2025, which was a decrease of over 5,500 jobs from a year ago.
- Small size employers, with less than 20 employees, provided nearly 41,000 jobs or 27% of private-sector employment in first quarter 2025.
- Mid-size employers, with 20-99 employees, provided over 38,200 jobs or 26% of private sector employment in first quarter 2025.
- Large employers, with 100-500 employees, provided about 70,300 jobs and made up 47% of private-sector employment in first quarter 2025.
- The largest employers, with over 500 employees, provided over 34,400 jobs and made up 23% of private-sector employment in first quarter 2025.

SLOWING POPULATION GROWTH EXPECTED IN OREGON

Oregon Population Growth

Annual change in total state population

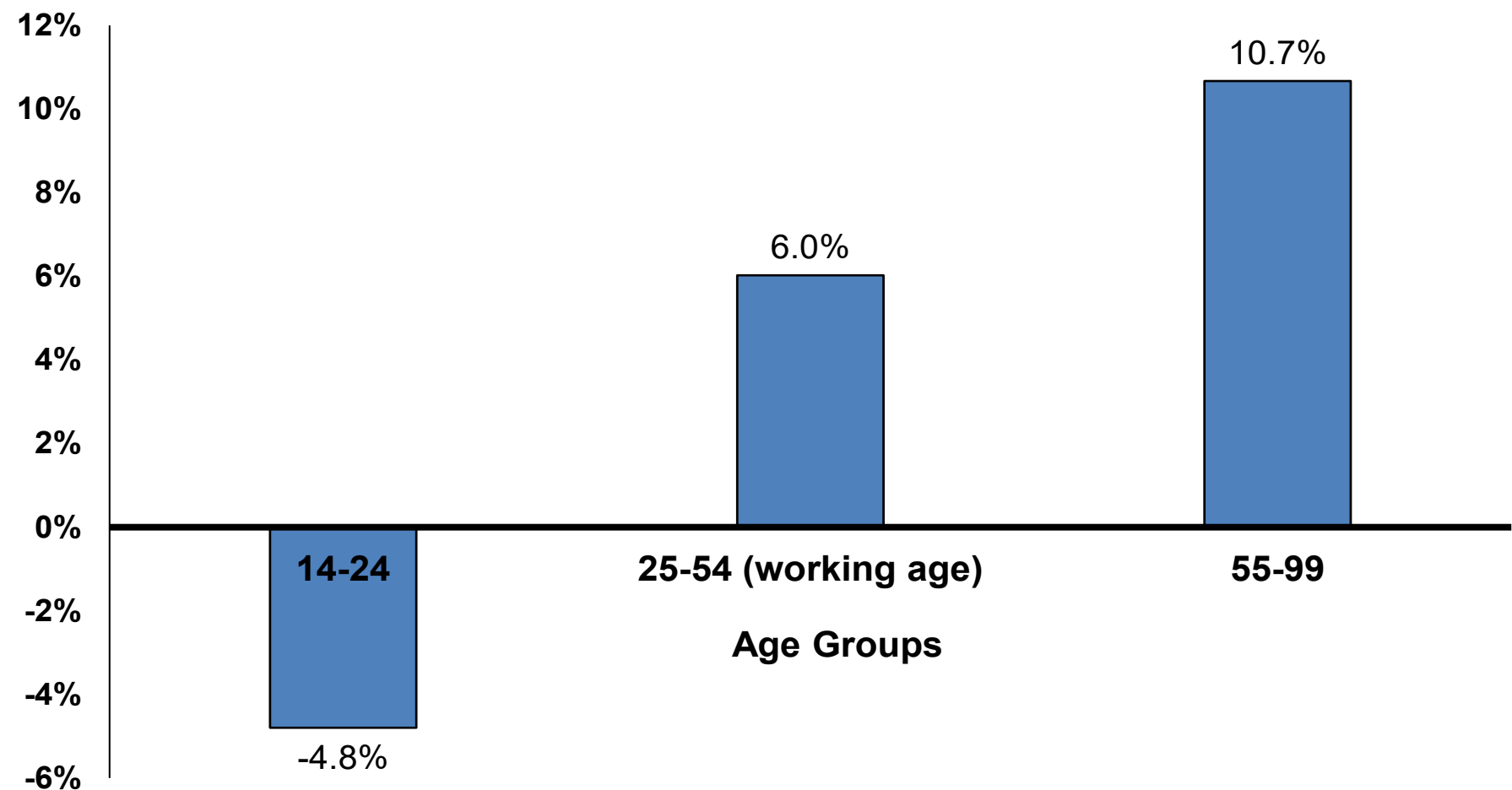
History/Forecast and PSU Estimates



Oregon is growing slower than the U.S

- Total growth slower in part due to deaths outnumbering births.
- Oregon's entire population growth will come from net migration.
- Oregon's population expected to grow by average of 0.4% through 2035.

Change in % of Workers by Age Group
Clackamas County: 2018/Q3 - 2024/Q4
Private Industry



Source: Oregon Employment Department, LEHD

Thank You!



LYNN WALLIS, ECONOMIST

LYNN.N.WALLIS@EMPLOY.OREGON.GOV

SIGN UP FOR THE LATEST WORKFORCE AND ECONOMIC RESEARCH
WWW.QUALITYINFO.ORG/SUBSCRIBE