

# **CWP BUSINESS SERVICES CONTRACTORS SECTOR MEETING**

## **ECONOMIC UPDATE**

**NOVEMBER 12, 2025**

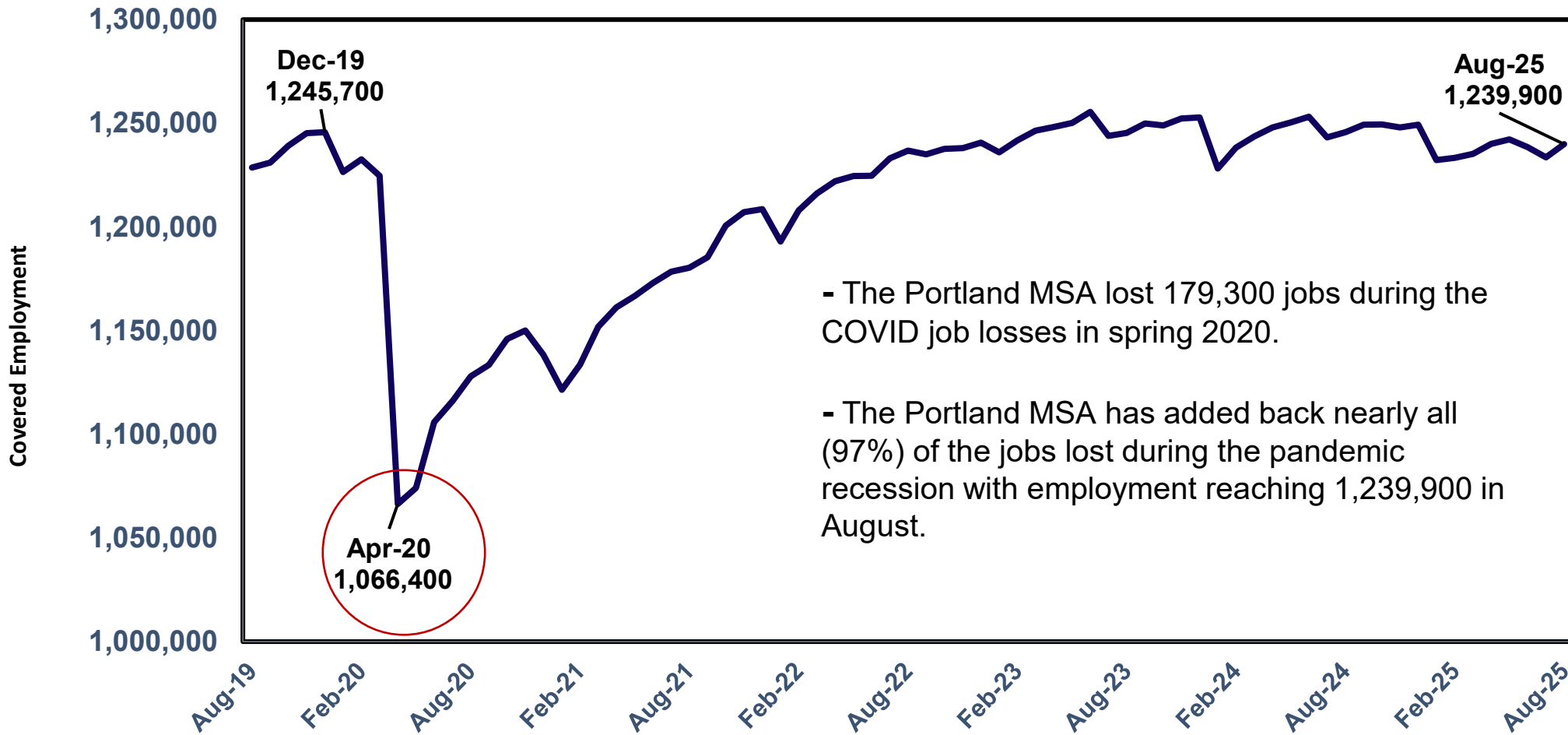
# AGENDA

- Job Recovery
- Labor Force and Unemployed
- Demand for Workers
- Projected Job Growth
- Labor Shed

# JOB RECOVERY

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

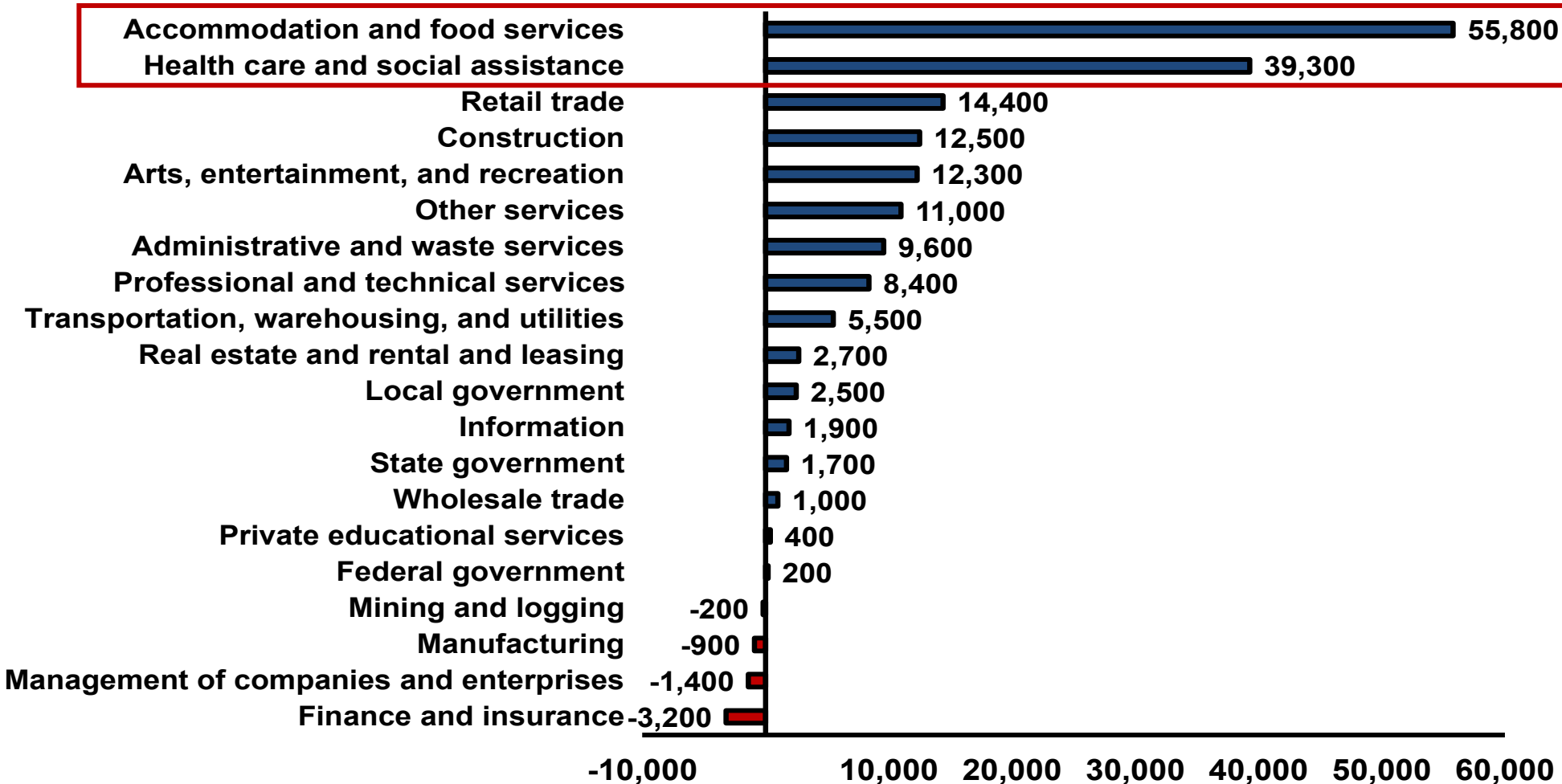
## Monthly Nonfarm Employment: Portland MSA (OR-WA) August 2019 to August 2025 (not seasonally adjusted)



Source: Oregon Employment Department, Current Employment Statistics

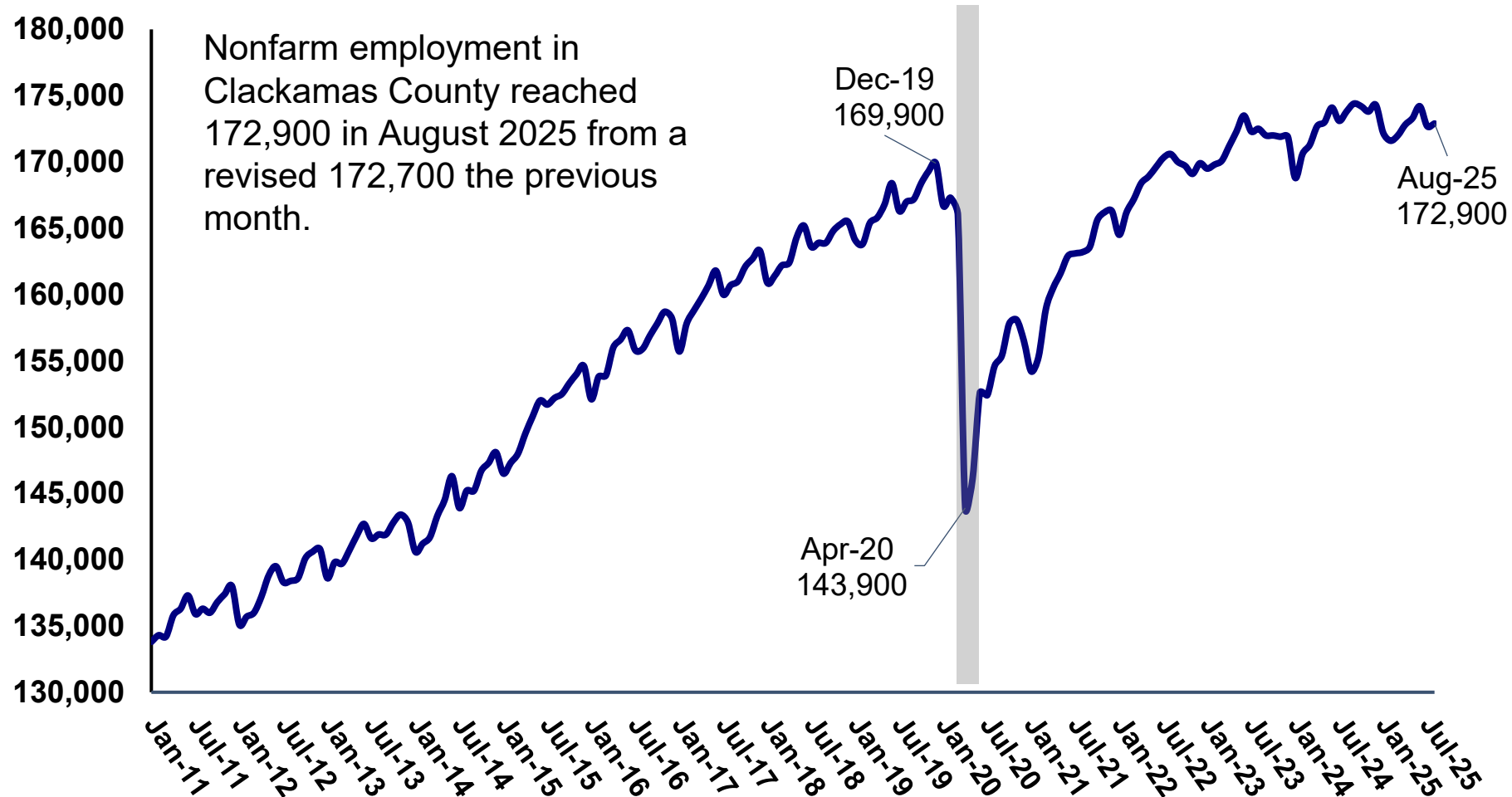
# MAJORITY OF JOB RECOVERY IN TWO BROAD INDUSTRIES

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

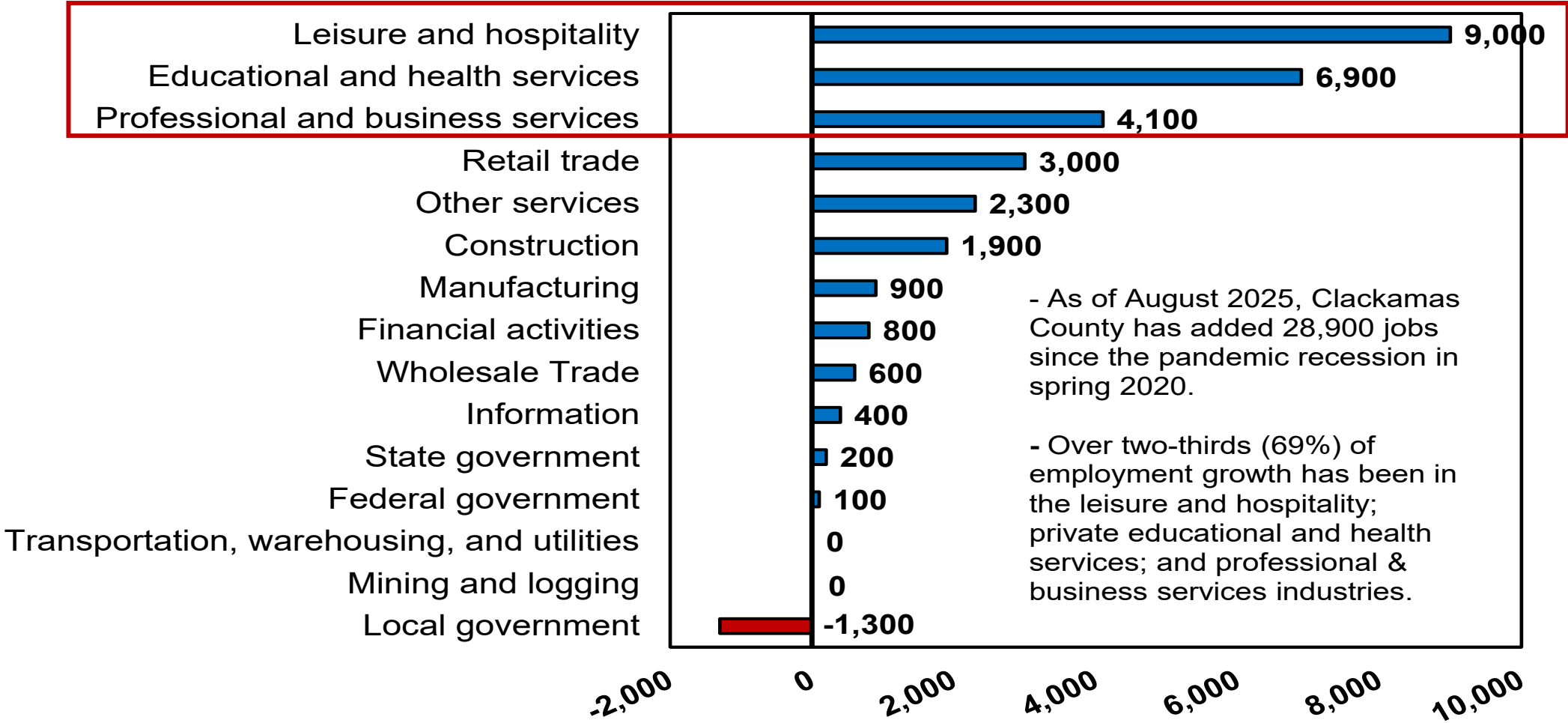


Source: Oregon Employment Department, current employment statistics

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



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

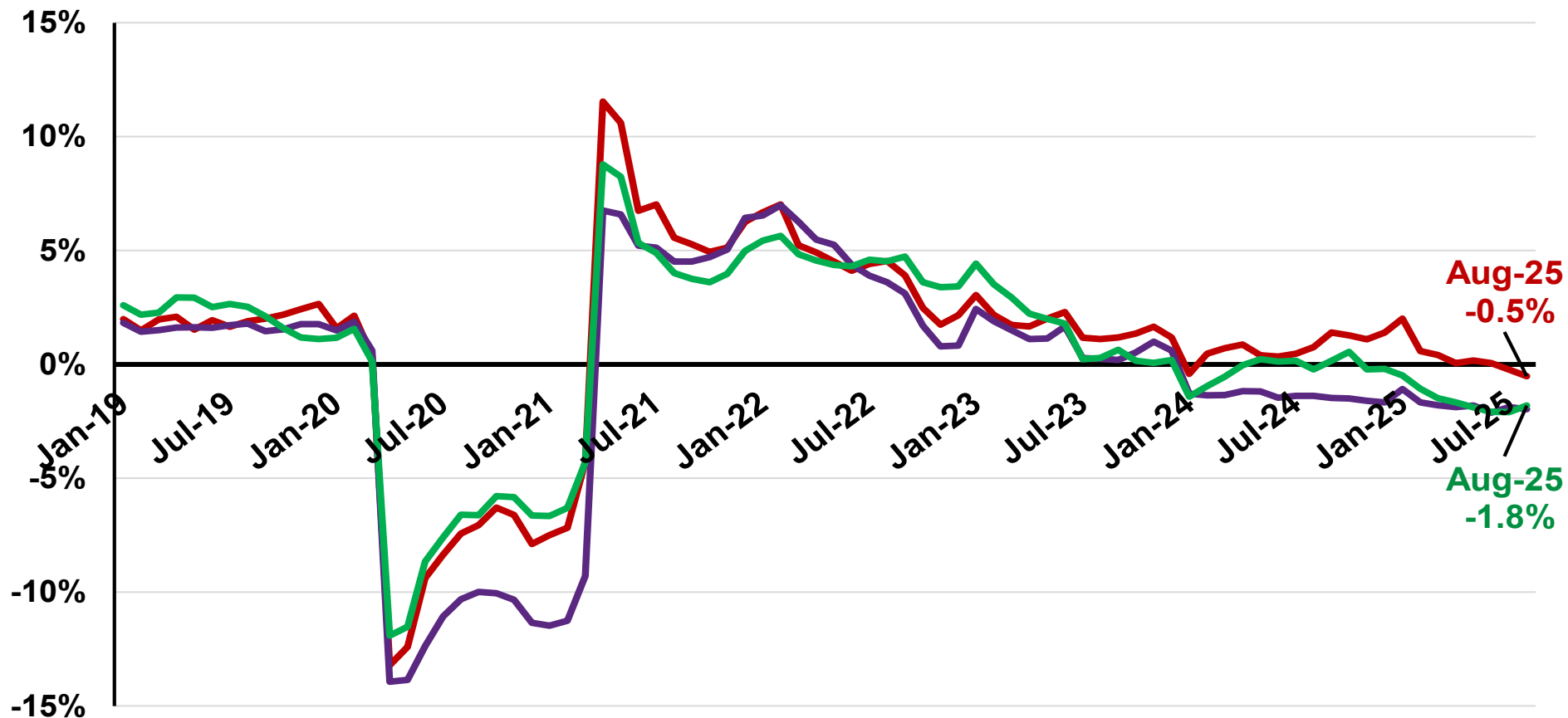


Source: Oregon Employment Department, Current Employment Statistics

## NEGATIVE EMPLOYMENT GROWTH FOR LAST 10 MONTHS IN PORTLAND METRO

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

— Clackamas County — Multnomah County — Washington County



Source: Oregon Employment Department, Current Employment Statistics



# DEMAND FOR WORKERS

# JOB VACANCIES

# OREGON BUSINESSES REPORTED 53,600 VACANCIES IN SUMMER 2025.

## Oregon Private Job Vacancies Summer 2025

<b>Vacancies</b>	<b>53,642</b>
Average Hourly Wage	\$26.76
Full-time Positions	81%
Permanent Positions	93%
Requiring Education Beyond High School	37%
Experience	62%
Difficult to Fill	57%

*Source: Oregon Employment Department*

Oregon businesses reported 53,600 vacancies in summer 2025. Vacancies increased 5% from the spring and decreased 12% from summer 2024. Employers reported difficulty filling 57% of summer 2025 vacancies.

The average starting wage among this group of vacancies was \$26.76 per hour, an inflation-adjusted increase of 2% from summer 2024, and 6% decrease from spring 2025.

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

# THE PORTLAND TRI-COUNTY AREA REPRESENTED 38% OF SUMMER 2025 JOB VACANCIES.

## Oregon Private Job Vacancies by Geography, Summer 2025

Geography	Vacancies
<b>Oregon Statewide</b>	<b>53,642</b>
Portland Metro	12,443
Clackamas	8,122
Mid-Valley	7,194
East Cascades	6,698
Lane	4,878
Rogue Valley	4,447
Northwest Oregon	3,812
Eastern Oregon	2,696
Southwestern Oregon	2,224

Multi-area or unknown regions excluded  
Source: Oregon Employment Department

Summer vacancies were distributed across the state, with the Portland tri-county area (Portland Metro and Clackamas County) accounting for 38%.

# BUSINESSES REPORTED HIRING IN VARIOUS INDUSTRIES.

## Oregon Private Job Vacancies by Industry, Summer 2025

Industry	Vacancies
<b>All Industries</b>	<b>53,642</b>
Health care and social assistance	12,542
Retail trade	6,075
Construction	6,047
Leisure and hospitality	4,553
Professional, scientific, and technical services	4,390
Management, administrative, and waste services	3,567
Financial activities	3,486
Other services	3,402
Transportation, warehousing, and utilities	3,207
Wholesale trade	1,803
Manufacturing	1,452
Information	1,310
Private educational services	1,223
Natural resources and mining	585

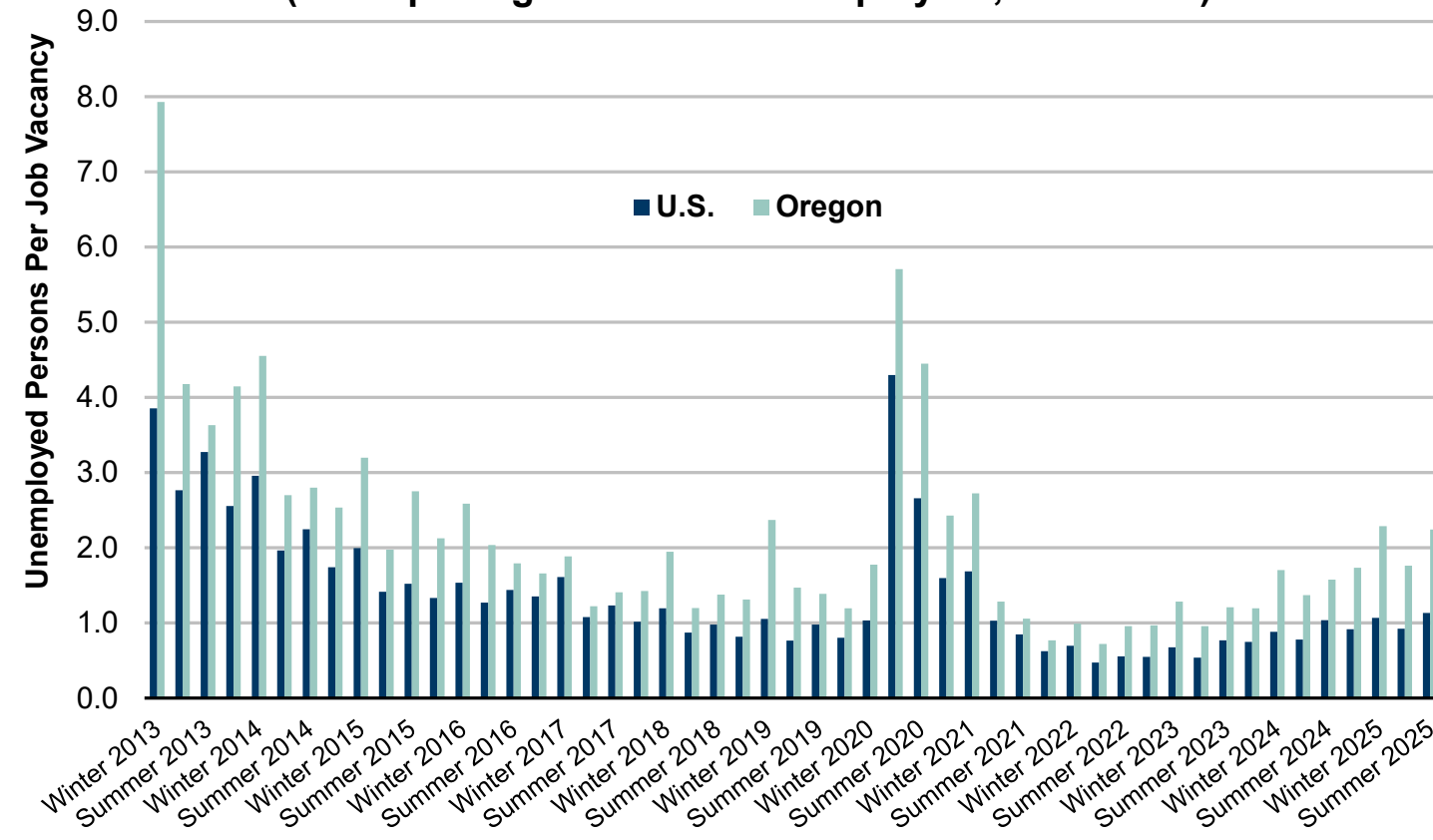
Source: Oregon Employment Department

Health care and social assistance represented 23% of all vacancies, with 12,500. Retail trade had 6,100 and construction had 6,000.

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

# AS UNEMPLOYMENT INCREASED IN THE SUMMER, THE UNEMPLOYED TO JOB VACANCY RATIO IN OREGON INCREASED TO 2.2.

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



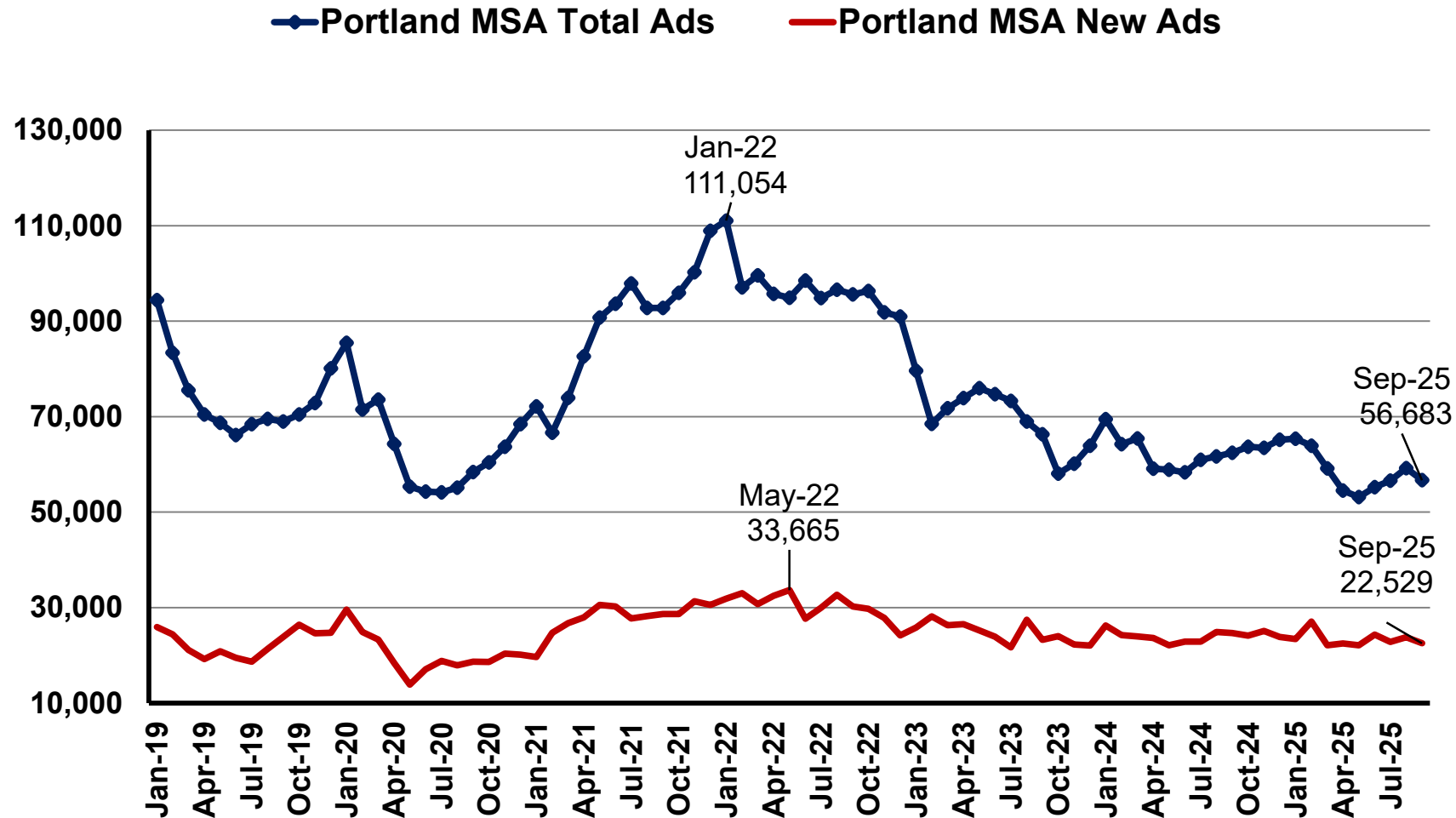
The U.S. ratio was 1.1 in July 2025. It reached 4.3 in April 2020 after several years around 1-to-1.

Oregon had 2.2 unemployed per job vacancy in summer 2025, part of a steady rise since the post-pandemic recession expansion period in 2021 and 2022.

# ONLINE JOB ADS

# PORTLAND MSA TOTAL ONLINE ADS TRENDING DOWN SINCE 2022

## Help Wanted Online Ads, Portland MSA 2019-2025



Source: Oregon Employment Department, Help Wanted Online Ads, Conference Board - Lightcast



## Help Wanted Online Ads by County

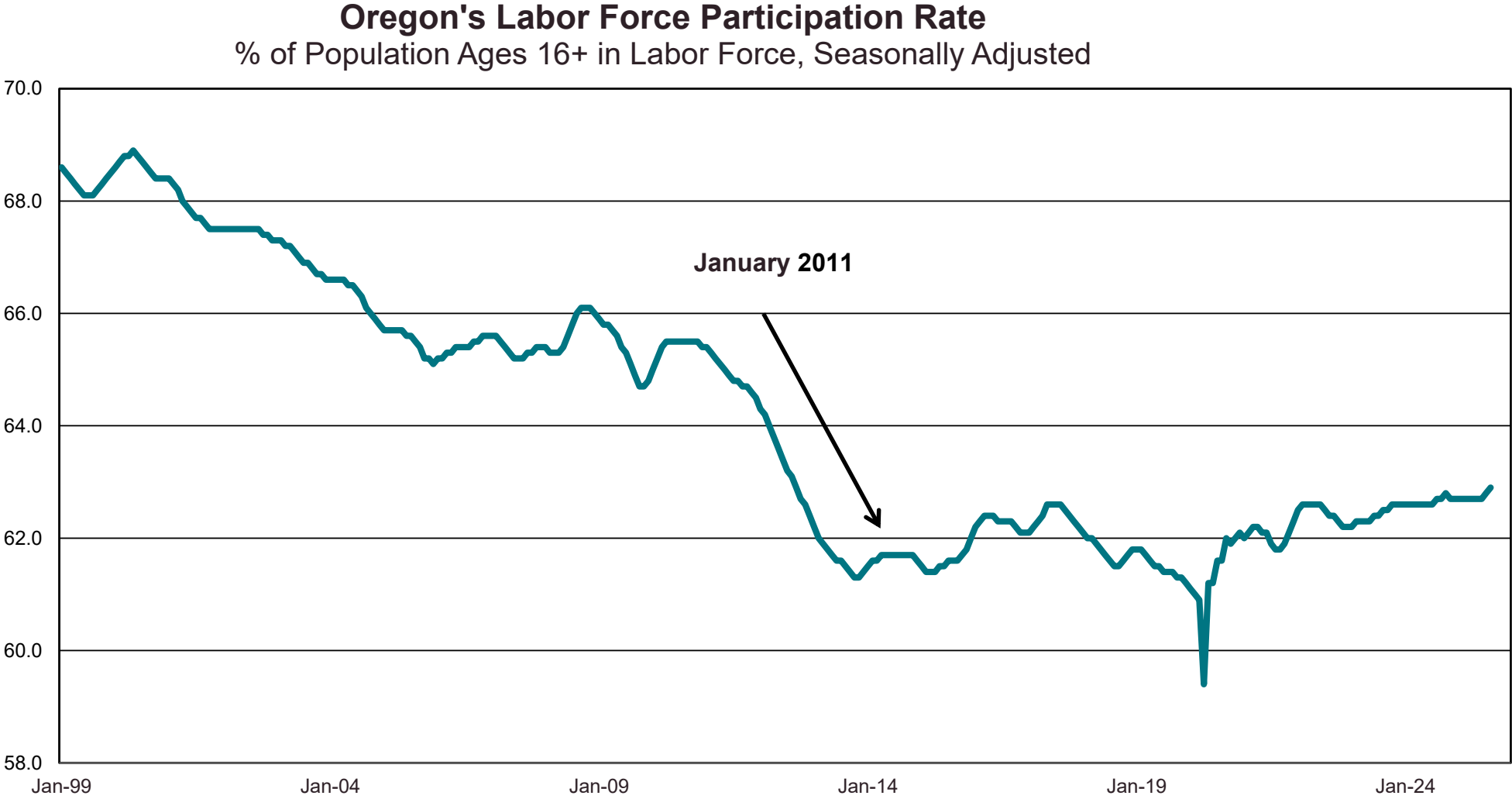
### September 2025, Not Seasonally Adjusted

{	Multnomah	22,523	Coos	1,136	Malheur	434
	Washington	14,991	Polk	1,122	Crook	372
	Clackamas	9,254	Lincoln	1,044	Morrow	359
	Marion	9,155	Josephine	1,027	Jefferson	350
	Lane	7,376	Klamath	999	Curry	246
	Deschutes	5,586	Clatsop	939	Harney	135
	Jackson	3,752	Hood River	633	Grant	119
	Linn	1,965	Columbia	515	Lake	100
	Benton	1,898	Wasco	475	Wallowa	67
	Yamhill	1,687	Tillamook	459	Sherman	64
	Douglas	1,626	Union	449	Gilliam	45
	Umatilla	1,420	Baker	436	Wheeler	17

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

# LABOR FORCE AND UNEMPLOYED WORKERS

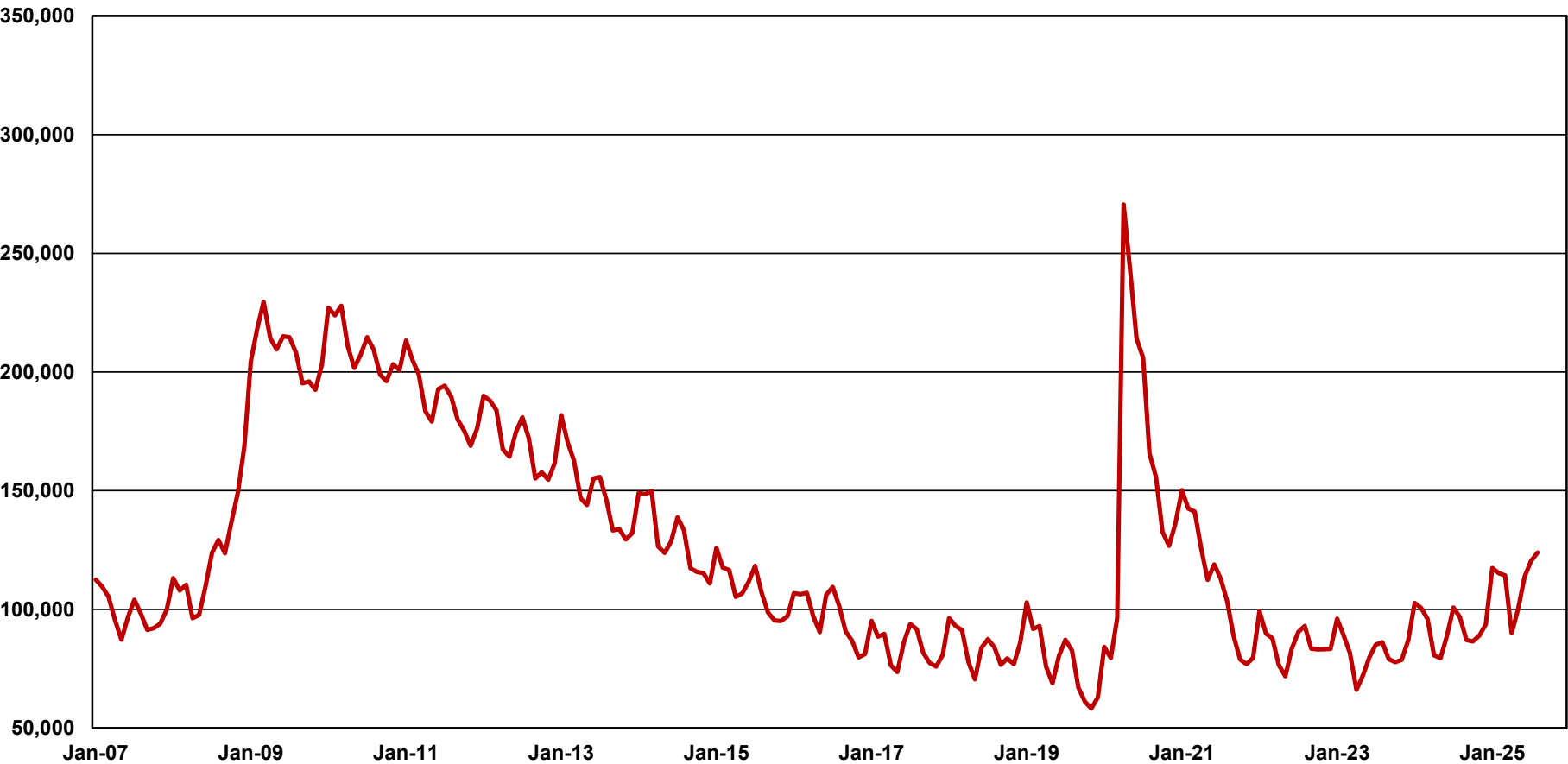
OREGON'S LABOR FORCE PARTICIPATION RATE REACHED 62.9% IN AUGUST.



Source: Oregon Employment Department, Local Area Unemployment Statistics

THE NUMBER OF UNEMPLOYED OREGONIANS HAS TRENDED UPWARDS RECENTLY.

Unemployed Persons, Oregon Statewide  
Not Seasonally Adjusted, 2007 to Present

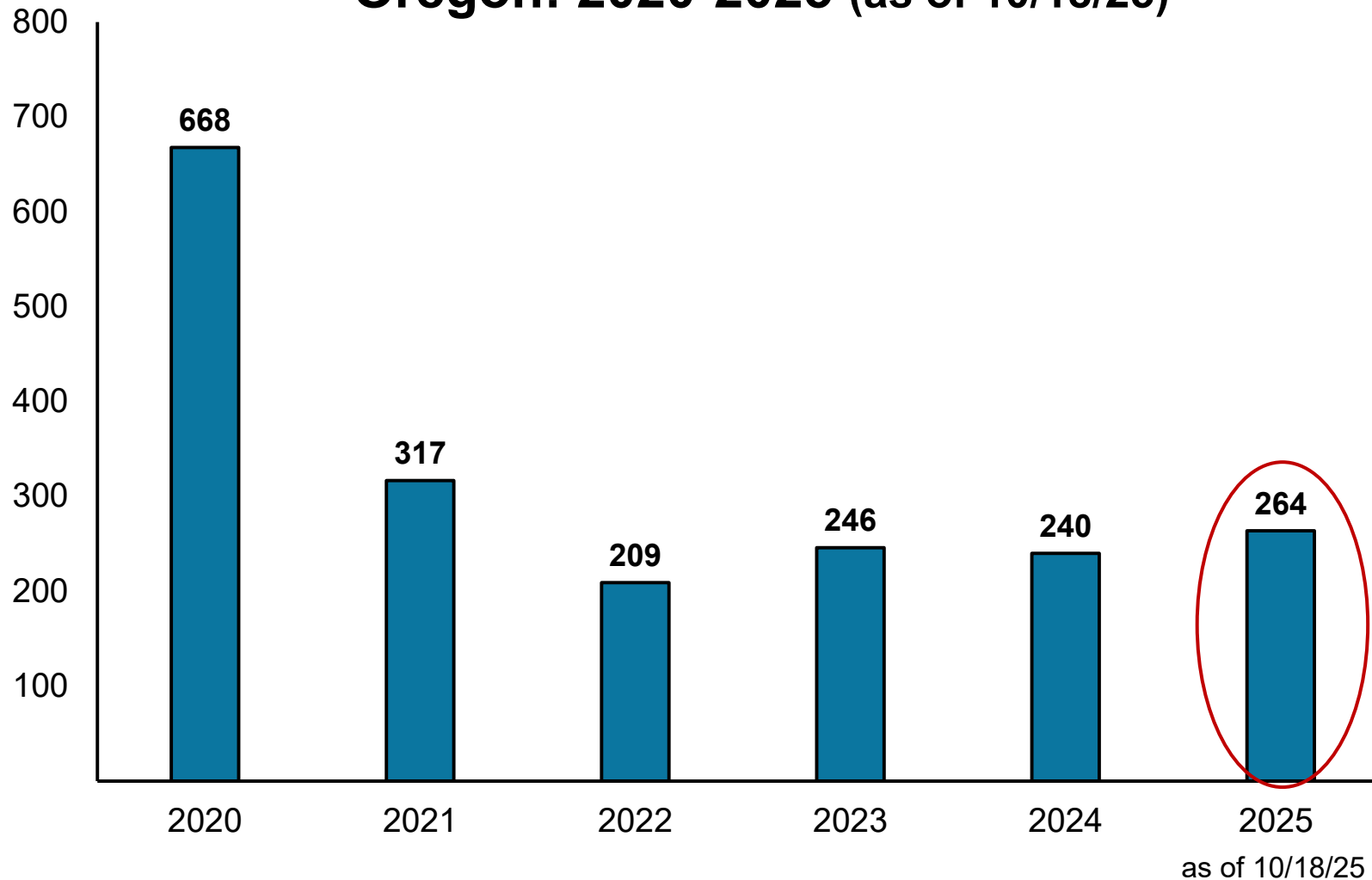


Number of Unemployed  
in August (not adjusted):

- 2019: 82,700
- 2020: 165,700
- 2021: 103,400
- 2022: 93,000
- 2023: 84,100
- 2024: 97,700
- 2025: 123,900

Source: Oregon Employment Department, Local Area Unemployment Statistics

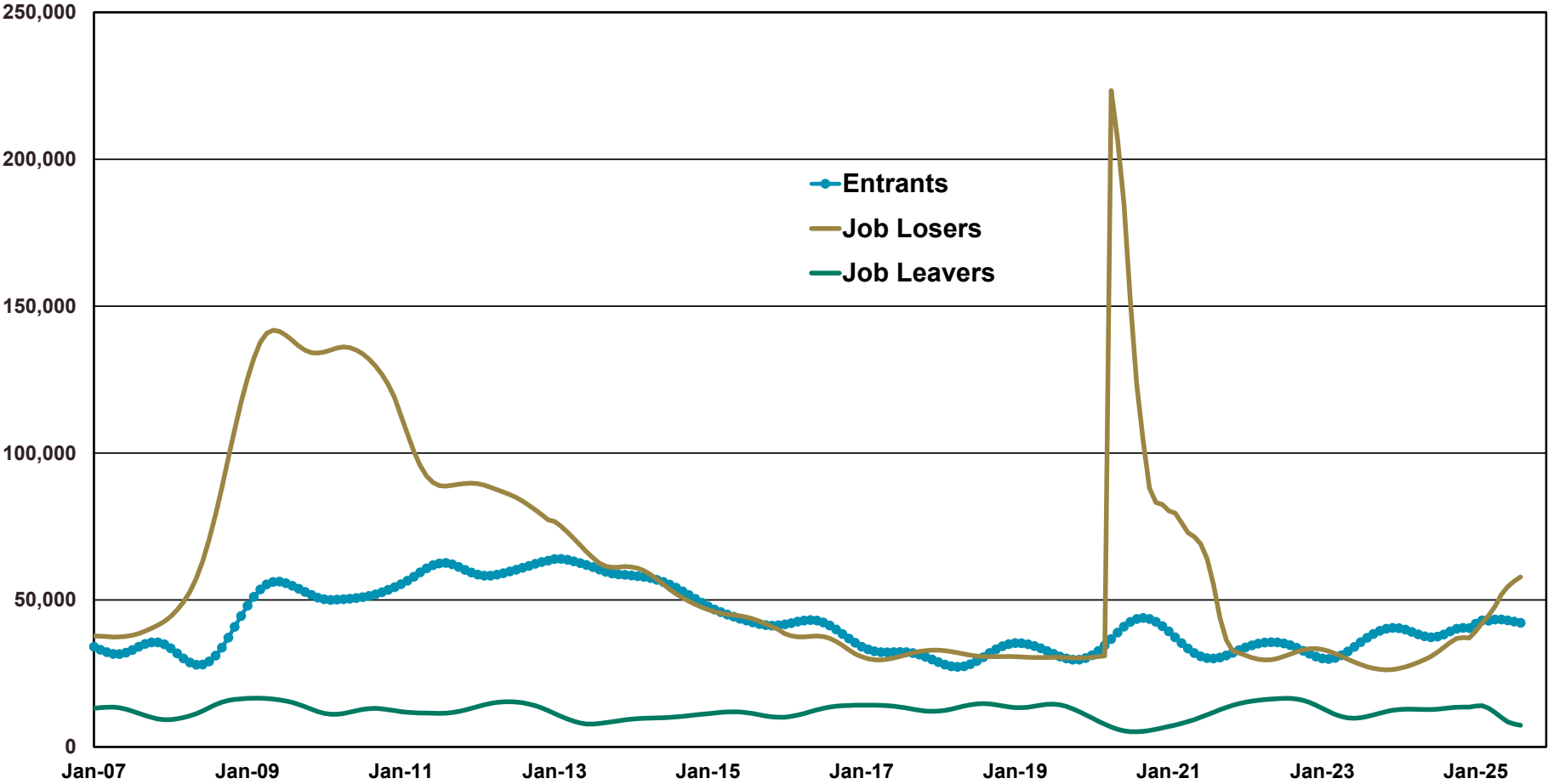
## Average Annual Weekly UI Claims Oregon: 2020-2025 (as of 10/18/25)



Source: Oregon Employment Department, U.S. Bureau of Labor Statistics

# WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



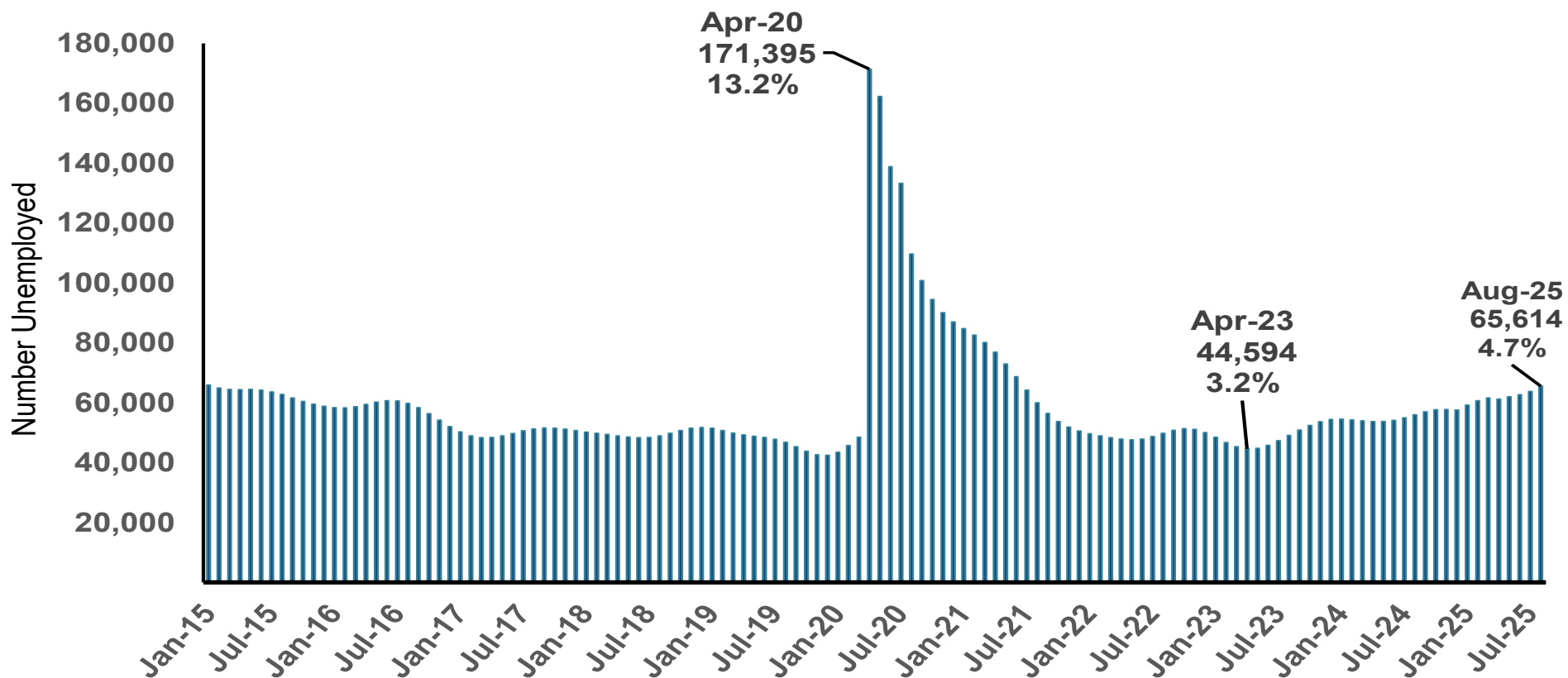
**New or returning to the workforce**  
42,300 (39%)

**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



- The number of unemployed residents in the Portland MSA reached 65,614 in August 2025 growing by 9,619 unemployed residents from a year ago.

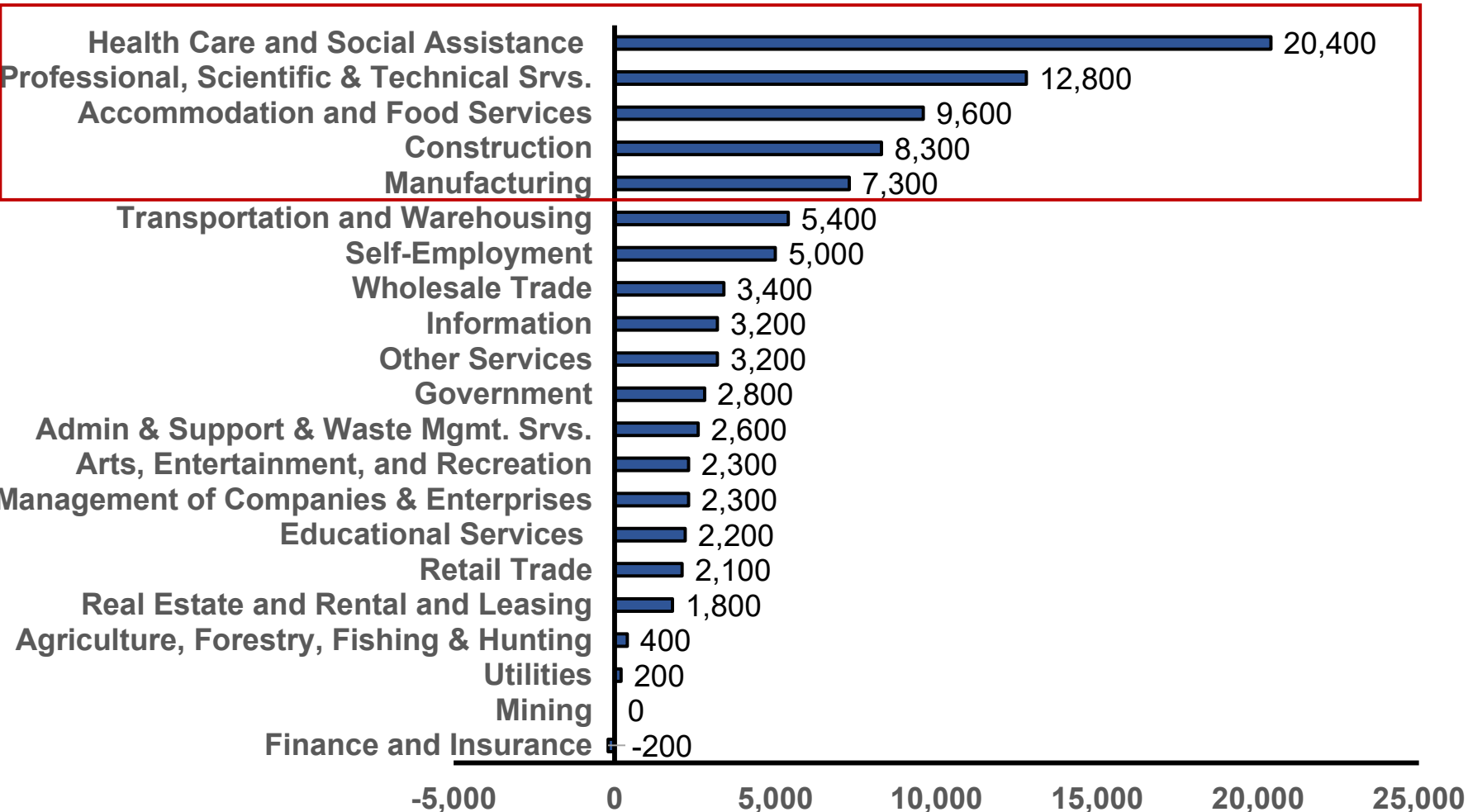
Source: Oregon Employment Department, LAUS

# PROJECTED JOB GROWTH



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

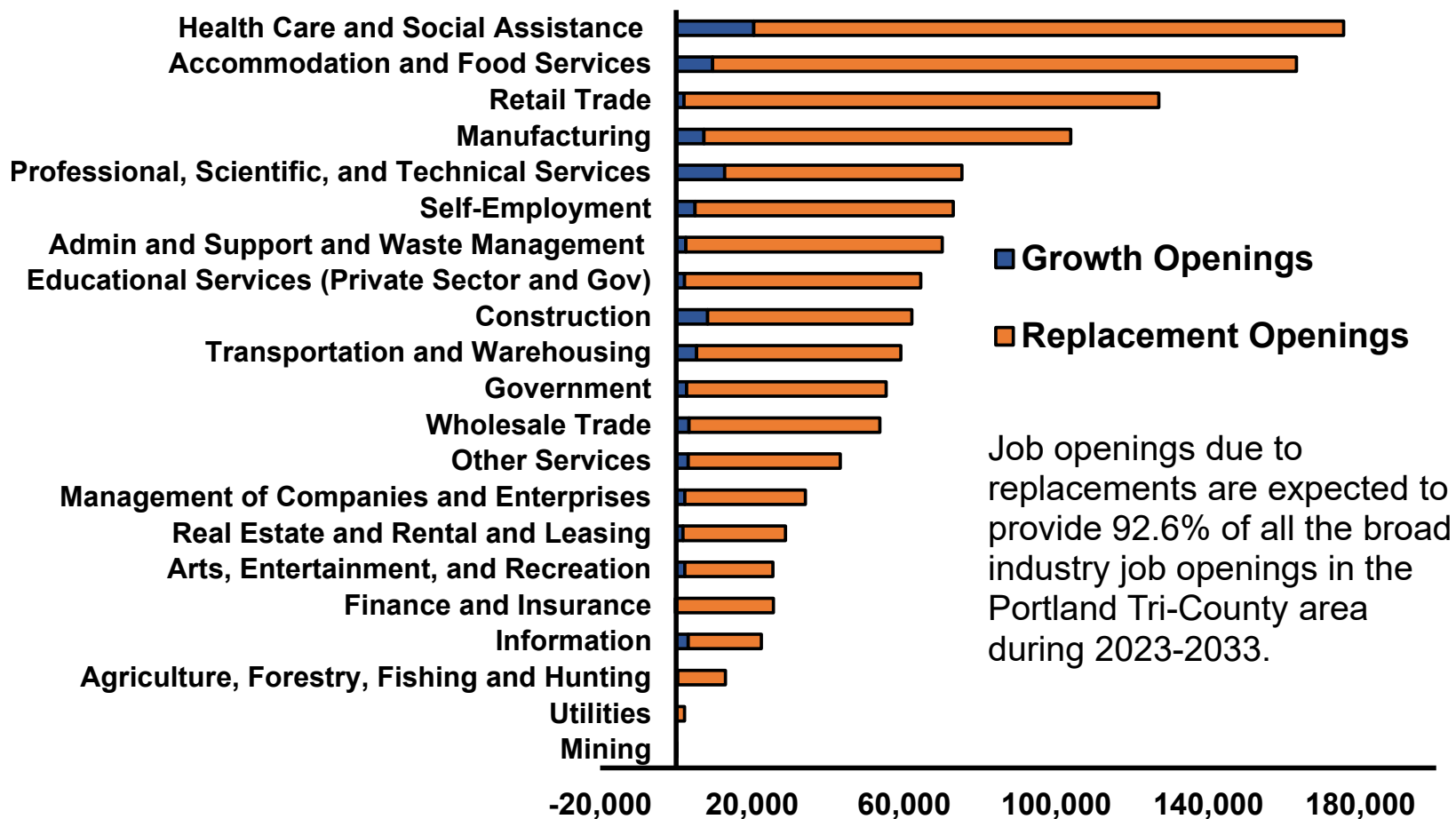
### Projected Industry **Employment Growth** (new jobs) Portland Tri-County: 2023-2033



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

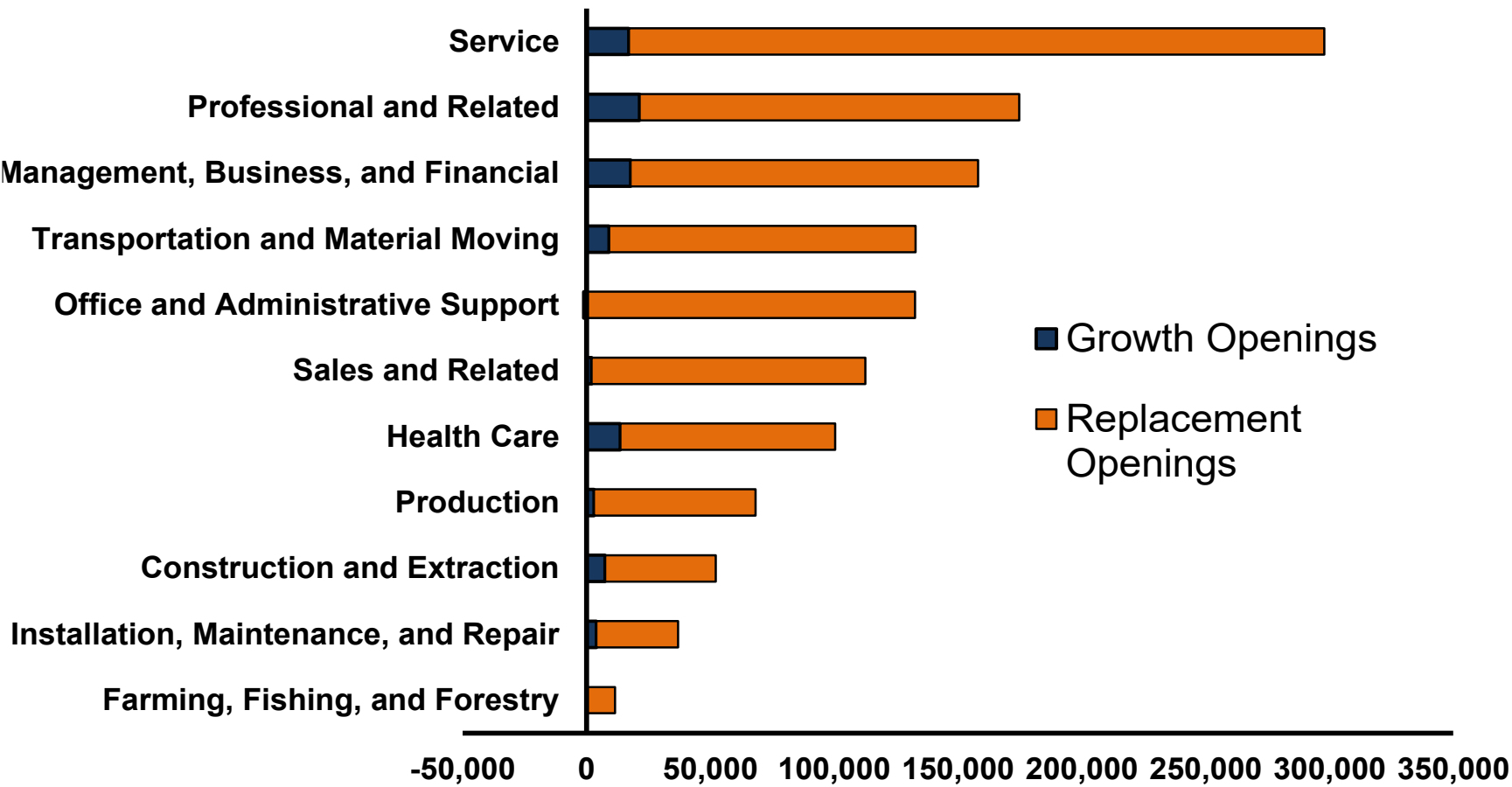


Source: Oregon Employment Department, Industry Projections: 2023-2033

- 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 MAKE MAKE UP THE MAJORITY OF JOB OPENINGS

Occupational Projections: 2023-2033  
Portland Tri-County



- 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.

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

# LABOR SHED

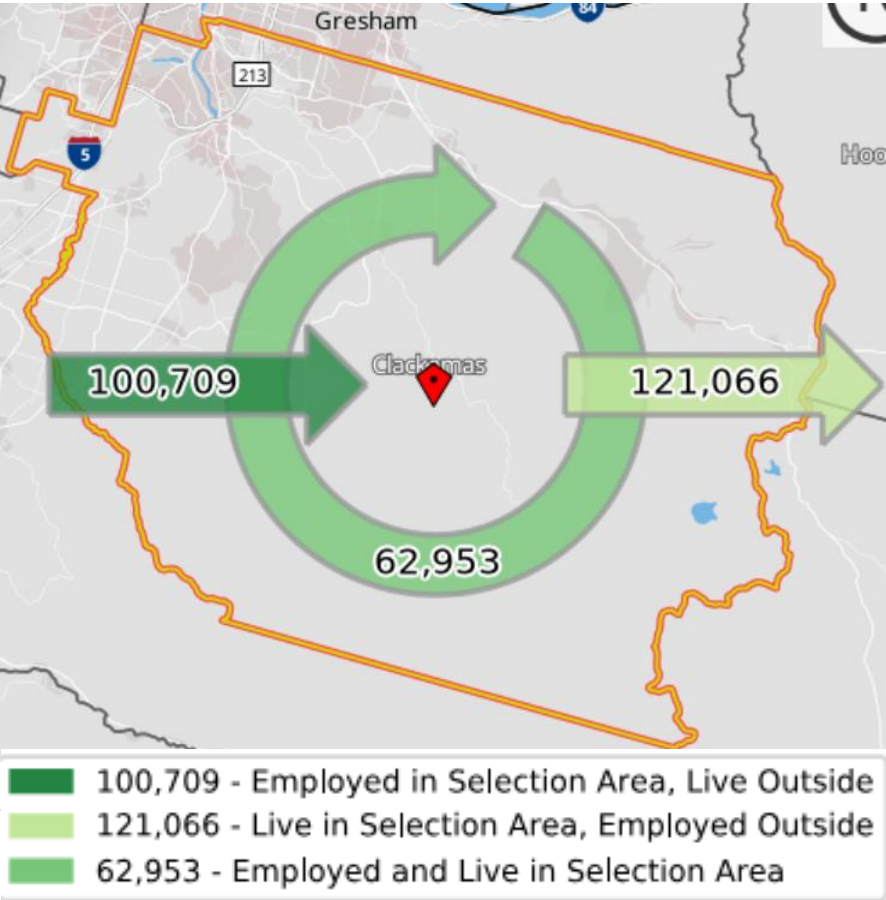
# WHERE DO CLACKAMAS COUNTY RESIDENTS GO TO WORK?

## In-Area Labor Force Efficiency (Primary Jobs) Living in Clackamas County

Living in the Selection Area  
Living and Employed in the Selection Area  
Living in the Selection Area but Employed Outside

	2022	
	Count	Share
Living in the Selection Area	184,019	100.0%
Living and Employed in the Selection Area	62,953	34.2%
Living in the Selection Area but Employed Outside	121,066	65.8%

Source: U.S. Census LEHD, On-The-Map



## Job Counts by Counties Where Workers Living in Clackamas County are Employed Primary Jobs

	<u>2022</u>	
	Count	Share
Multnomah County, OR	65,676	35.7%
Clackamas County, OR	62,953	34.2%
Washington County, OR	30,999	16.8%
Marion County, OR	8,485	4.6%
Clark County, WA	2,595	1.4%
Lane County, OR	1,831	1.0%
Yamhill County, OR	1,616	0.9%
Deschutes County, OR	1,172	0.6%
King County, WA	888	0.5%
Linn County, OR	710	0.4%
Benton County, OR	515	0.3%
Polk County, OR	429	0.2%
Hood River County, OR	388	0.2%
Columbia County, OR	347	0.2%
Jackson County, OR	347	0.2%
Clatsop County, OR	248	0.1%
Douglas County, OR	238	0.1%
Wasco County, OR	225	0.1%
Pierce County, WA	223	0.1%
Lincoln County, OR	217	0.1%
Cowlitz County, WA	216	0.1%
Umatilla County, OR	216	0.1%
Tillamook County, OR	195	0.1%
Josephine County, OR	154	0.1%
Yakima County, WA	125	0.1%
All Other Locations	3,011	1.6%

Source: U.S. Census LEHD, On-The-Map

## Where do Clackamas County Residents Travel to Work?

## Job Counts by Places Where Workers Who Live in Clackamas County are Employed Primary Jobs

	<u>2022</u>	
	Count	Share
Portland city, OR	57,260	31.1%
Oregon City city, OR	7,103	3.9%
Tigard city, OR	6,493	3.5%
Lake Oswego city, OR	6,121	3.3%
Tualatin city, OR	5,896	3.2%
Beaverton city, OR	5,872	3.2%
Gresham city, OR	5,830	3.2%
Wilsonville city, OR	5,693	3.1%
Milwaukie city, OR	4,781	2.6%
Hillsboro city, OR	4,687	2.5%
Salem city, OR	4,161	2.3%
Canby city, OR	3,376	1.8%
West Linn city, OR	2,692	1.5%
Happy Valley city, OR	2,055	1.1%
Oak Grove CDP, OR	1,760	1.0%
Sandy city, OR	1,753	1.0%
Vancouver city, WA	1,701	0.9%
Troutdale city, OR	1,625	0.9%
Gladstone city, OR	1,425	0.8%
Molalla city, OR	1,293	0.7%
West Haven-Sylvan CDP, OR	1,185	0.6%
Eugene city, OR	1,136	0.6%
Woodburn city, OR	1,089	0.6%
Estacada city, OR	987	0.5%
Sherwood city, OR	973	0.5%
All Other Locations	47,072	25.6%

Source: U.S. Census LEHD, On-The-Map

# Where do Workers Live Who are Employed by Businesses in Clackamas County?

## In-Area Employment Efficiency (Primary Jobs) Workers Employed in Clackamas County

	2022	
	<u>Count</u>	<u>Share</u>
Employed in the Selection Area	163,662	100.0%
Employed and Living in the Selection Area	62,953	38.5%
Employed in the Selection Area but Living Outside	100,709	61.5%

Source: U.S. Census LEHD, On-The-Map



**Job Counts by County Where Workers  
Live Who Work in Clackamas County  
Primary Jobs**

**2022**

	Count	Share
Clackamas County, OR	62,953	38.5%
Multnomah County, OR	37,924	23.2%
Washington County, OR	23,833	14.6%
Marion County, OR	9,805	6.0%
Clark County, WA	6,354	3.9%
Yamhill County, OR	2,987	1.8%
Lane County, OR	2,321	1.4%
Deschutes County, OR	1,918	1.2%
Linn County, OR	1,520	0.9%
Polk County, OR	1,493	0.9%
Columbia County, OR	1,433	0.9%
Benton County, OR	985	0.6%
Cowlitz County, WA	899	0.5%
Jackson County, OR	800	0.5%
Clatsop County, OR	720	0.4%
Lincoln County, OR	715	0.4%
Wasco County, OR	531	0.3%
Tillamook County, OR	460	0.3%
Jefferson County, OR	440	0.3%
Hood River County, OR	404	0.2%
Douglas County, OR	368	0.2%
Crook County, OR	357	0.2%
King County, WA	322	0.2%
Josephine County, OR	311	0.2%
Umatilla County, OR	261	0.2%
All Other Locations	3,548	2.2%

Source: U.S. Census LEHD, On-The-Map

**Where do  
Workers Live  
Who Work for  
Businesses in  
Clackamas  
County?**

**Job Counts by Places Where Workers  
Employed in Clackamas County Live  
Primary Jobs**

**2022**

	Count	Share
Portland city, OR	28,605	17.5%
Gresham city, OR	6,785	4.1%
Oregon City city, OR	6,554	4.0%
Lake Oswego city, OR	3,860	2.4%
Beaverton city, OR	3,850	2.4%
West Linn city, OR	3,795	2.3%
Canby city, OR	3,525	2.2%
Tigard city, OR	3,521	2.2%
Wilsonville city, OR	3,328	2.0%
Salem city, OR	3,301	2.0%
Happy Valley city, OR	3,175	1.9%
Hillsboro city, OR	3,079	1.9%
Milwaukie city, OR	2,878	1.8%
Vancouver city, WA	2,726	1.7%
Tualatin city, OR	2,497	1.5%
Oak Grove CDP, OR	2,408	1.5%
Sandy city, OR	2,145	1.3%
Oatfield CDP, OR	2,090	1.3%
Molalla city, OR	2,083	1.3%
Gladstone city, OR	2,009	1.2%
Aloha CDP, OR	1,736	1.1%
Woodburn city, OR	1,682	1.0%
Damascus CDP, OR	1,494	0.9%
Sherwood city, OR	1,417	0.9%
Jennings Lodge CDP, OR	1,169	0.7%
All Other Locations	63,950	39.1%

Source: U.S. Census LEHD, On-The-Map



## Clackamas County

### ECONOMIC INDICATORS

October 2025 (August data)



NOTICE: The U.S. Bureau of Labor Statistics (BLS) suspended the monthly employment and unemployment reports for the nation, states, and metropolitan areas as of October 1, 2025. The Clackamas County and Portland metropolitan area's monthly jobs and unemployment rate data for September are unavailable at this time. In the meantime, the Oregon Employment Department will highlight data and analysis that we continue to produce.

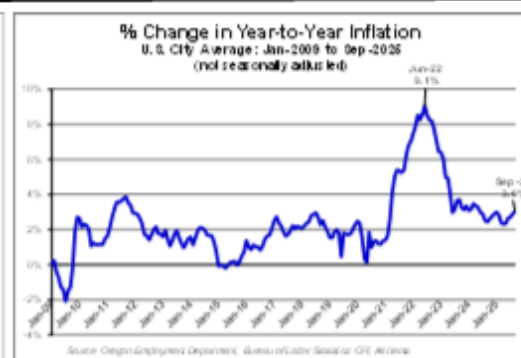
The Oregon Employment Department carries out an employer survey each quarter asking if an employer is hiring.

- Oregon businesses reported 53,600 job vacancies in the summer 2025 job vacancy survey and this group had an average starting wage of \$26.76.
- Job vacancies increased 5% from the spring survey and decreased 12% from the summer 2024 survey. Employers reported difficulty filling 57% of summer 2025 vacancies.
- Nearly one-half (45%) of the summer vacancies were in the health care and social assistance; retail trade; and construction.

#### Oregon Private Job Vacancies by Industry, Summer 2025

Industry	Vacancies	%
All Industries	53,642	
Health care and social assistance	12,542	23%
Retail trade	8,075	11%
Construction	6,047	11%
Leisure and hospitality	4,553	8%
Professional, scientific, and technical services	4,390	8%
Management, administrative, and waste services	3,557	7%
Financial activities	3,486	6%
Other services	3,402	6%
Transportation, warehousing, and utilities	3,207	6%
Wholesale trade	1,803	3%
Manufacturing	1,452	3%
Information	1,310	2%
Private educational services	1,223	2%
Natural resources and mining	585	1%

Source: Oregon Employment Department



- **UNEMPLOYED:** The seasonally adjusted unemployment rate in Clackamas County in August rose to 4.7% from 4.6% the previous month and 3.7% from a year ago.
- The number of residents who were unemployed rose to 10,768 in August, an increase of 290 from the previous month.
- The Consumer Price Index for All Urban Consumers for all items increased 3% over the last 12 months.
- The all items less food and energy index also rose 3% over the last 12 months. The energy index increased 2.8% for the 12 months ending in September and the food index increased 3.1% over the last year.

For any questions or to subscribe: Lynn Wallis (971) 804-2100 [Lynn.N.Wallis@employ.oregon.gov](mailto:Lynn.N.Wallis@employ.oregon.gov)

The Clackamas County Economic Indicator Report is published every month on [www.QualityInfo.org](http://www.QualityInfo.org) and includes the latest employment and labor force data.

For any questions or to subscribe to the monthly indicator report, contact Lynn Wallis @ [Lynn.N.Wallis@employ.oregon.gov](mailto:Lynn.N.Wallis@employ.oregon.gov)

# Thank You!

*Please scan the QR code for a short survey.*



LYNN WALLIS, ECONOMIST

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