

Employment Trends in Oregon, Linn County and Lebanon

Lebanon Chamber of Commerce
March 28, 2025

States that have a city named Lebanon:

- Illinois
- Indiana
- Kansas
- Kentucky
- Missouri
- New Hampshire
- Ohio
- Oregon
- Pennsylvania
- Tennessee

Lebanon's population growth has outpaced Linn County and Oregon during this century.

- Lebanon's population grew 57% from 2000 to 2023, adding nearly 7,400 residents. Lebanon's population topped 20,000 for the first time in 2023.
- Linn County's population grew 28% from 2000 to 2023. Oregon's population grew 26% over that time.

HAVE YOU BEEN ASKED TO PARTICIPATE IN A BUREAU OF LABOR STATISTICS (BLS) SURVEY? *PLEASE DO!*

BLS survey information is gathered to create data for businesses, jobseekers, workers and policy-makers about the economy including:

Employment*	Unemployment*	Occupational Wages*
Job vacancies*	Productivity	Occupational Employment*
Consumer spending patterns	Workplace injuries	Compensation
Long-term employment projections*	Employer-provided benefits	Price movements

** Collected and produced by Oregon Employment Department*

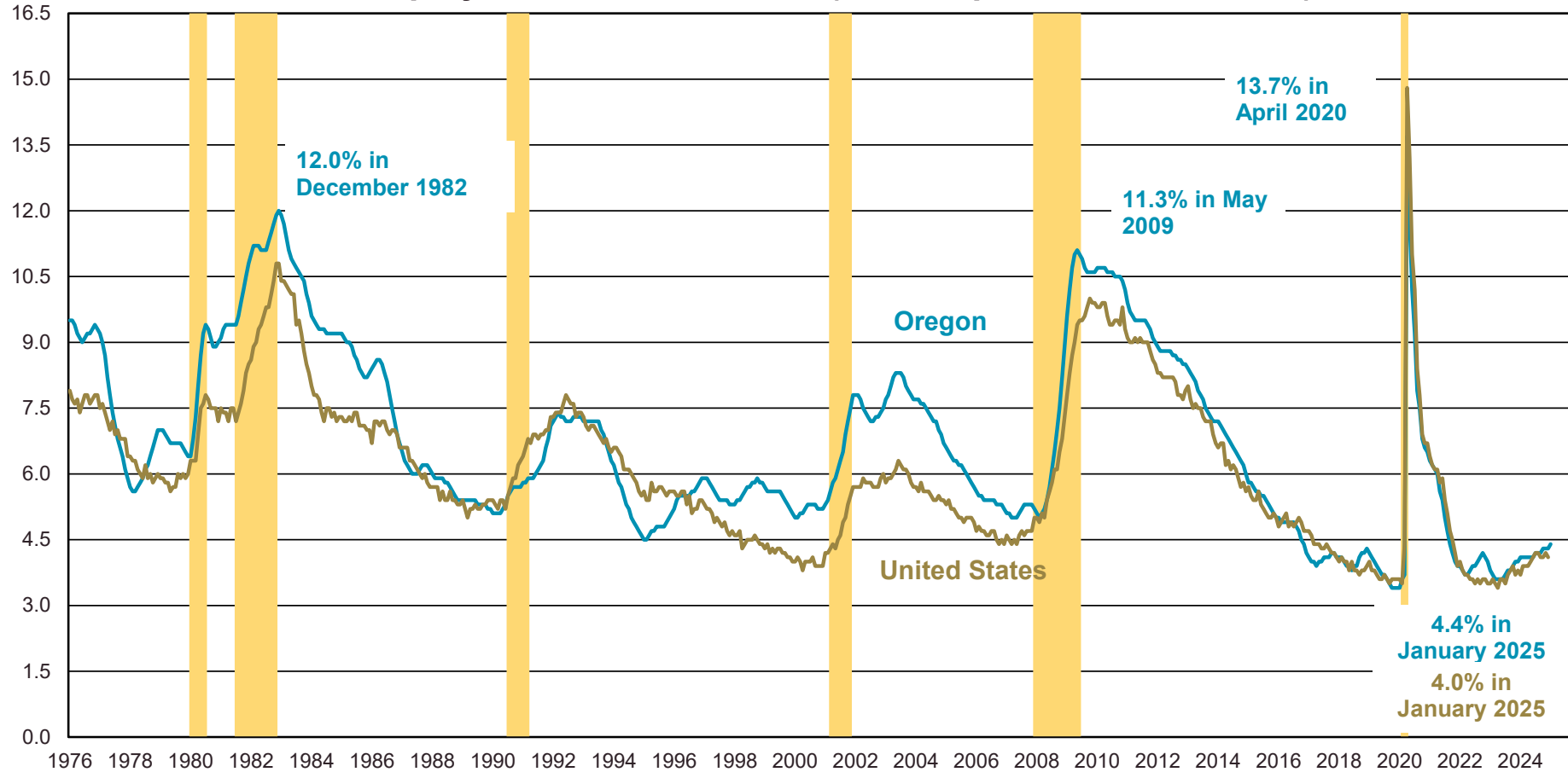
Your response is vital to ensuring accurate, complete, and unbiased data that is representative of the people and businesses in Oregon and the United States.

Your confidential responses are protected by federal and state law and strict security policies that prohibit us from releasing any information that could reveal the identity of you or your business without your consent.

Thank you for helping us track the Oregon economy!

OREGON'S UNEMPLOYMENT RATE WAS 4.4% IN JANUARY.

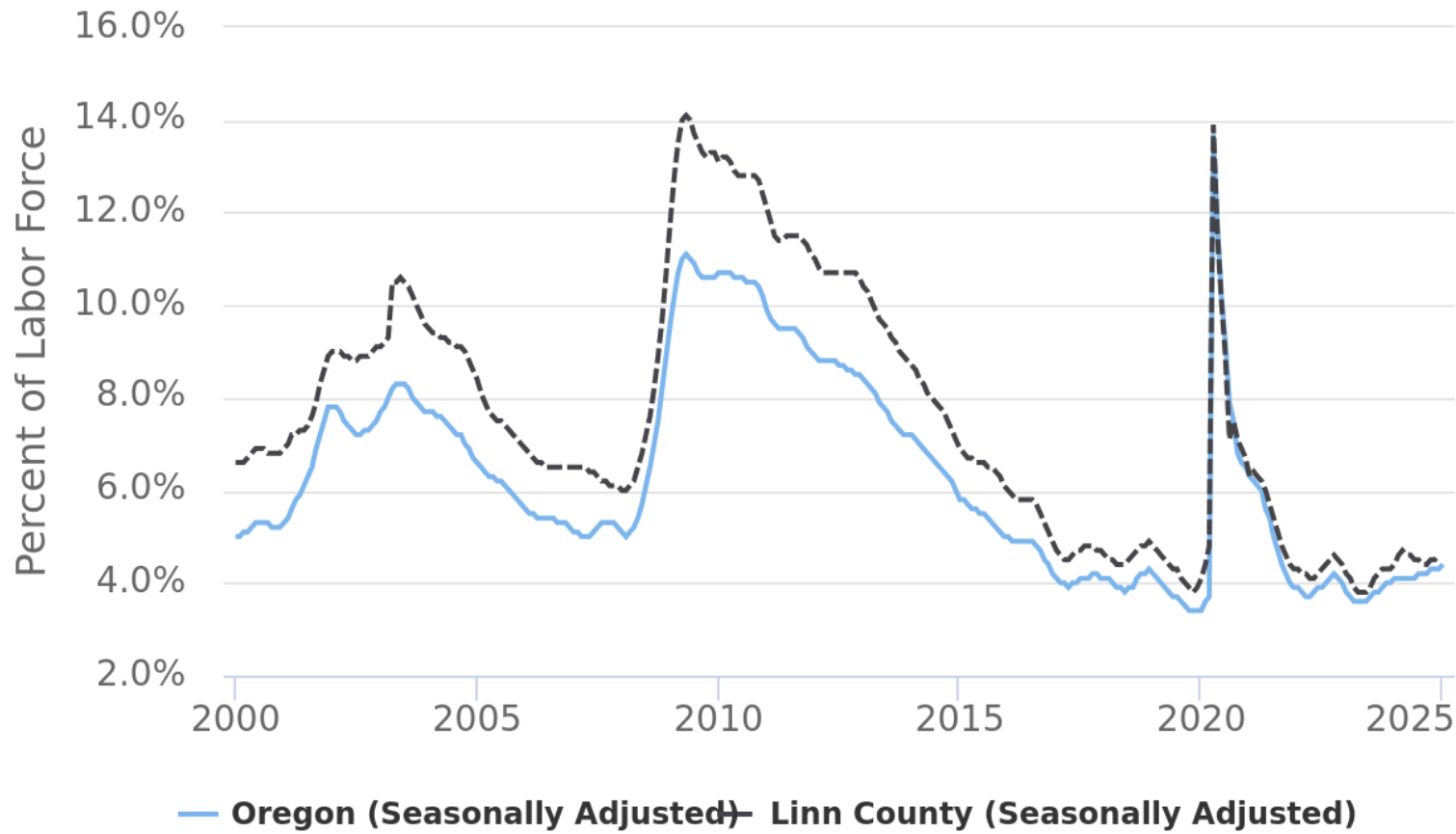
Oregon's Unemployment Rate Was 4.4% in January 2025 Unemployed % of Labor Force (Bars Represent Recessions)



Source: Oregon Employment Department and National Bureau of Economic Research

LINN COUNTY'S RATE OF 4.6% IN DECEMBER UP SLIGHTLY FROM A YEAR AGO WHEN THE RATE WAS 4.3%.

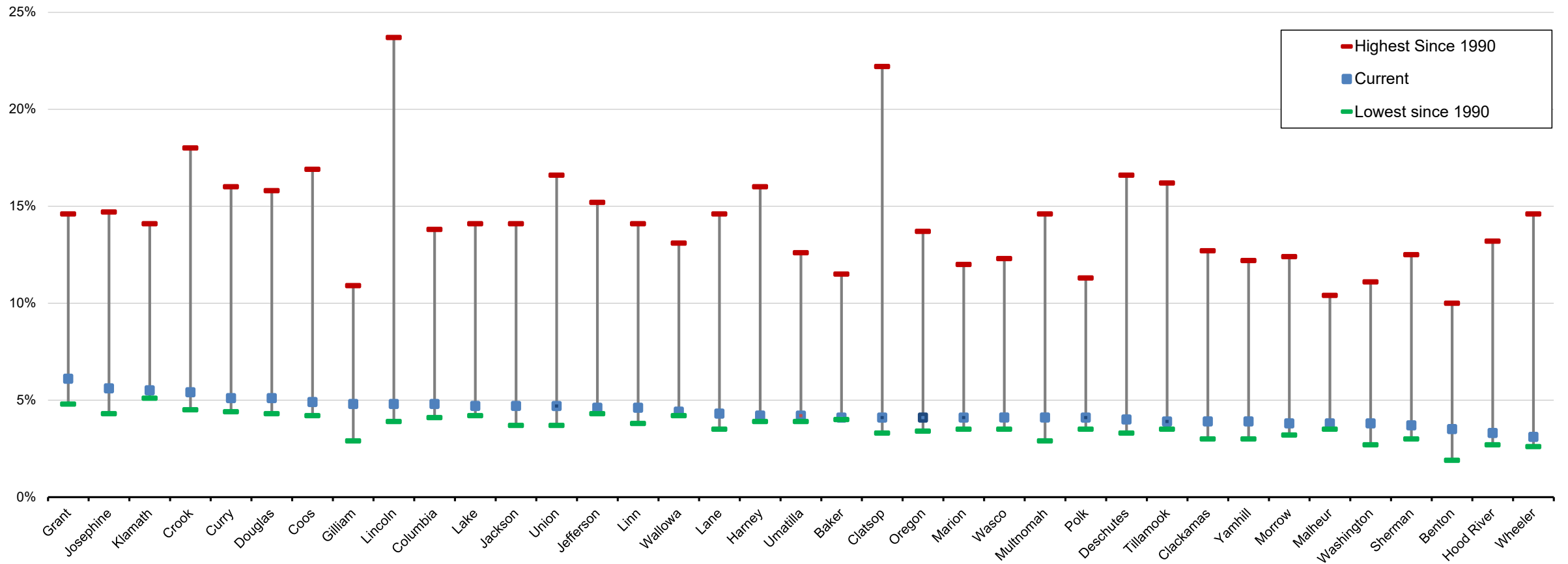
Unemployment Rate



Source: Oregon Employment Department Qualityinfo.org

Unemployment Rates in Oregon Counties

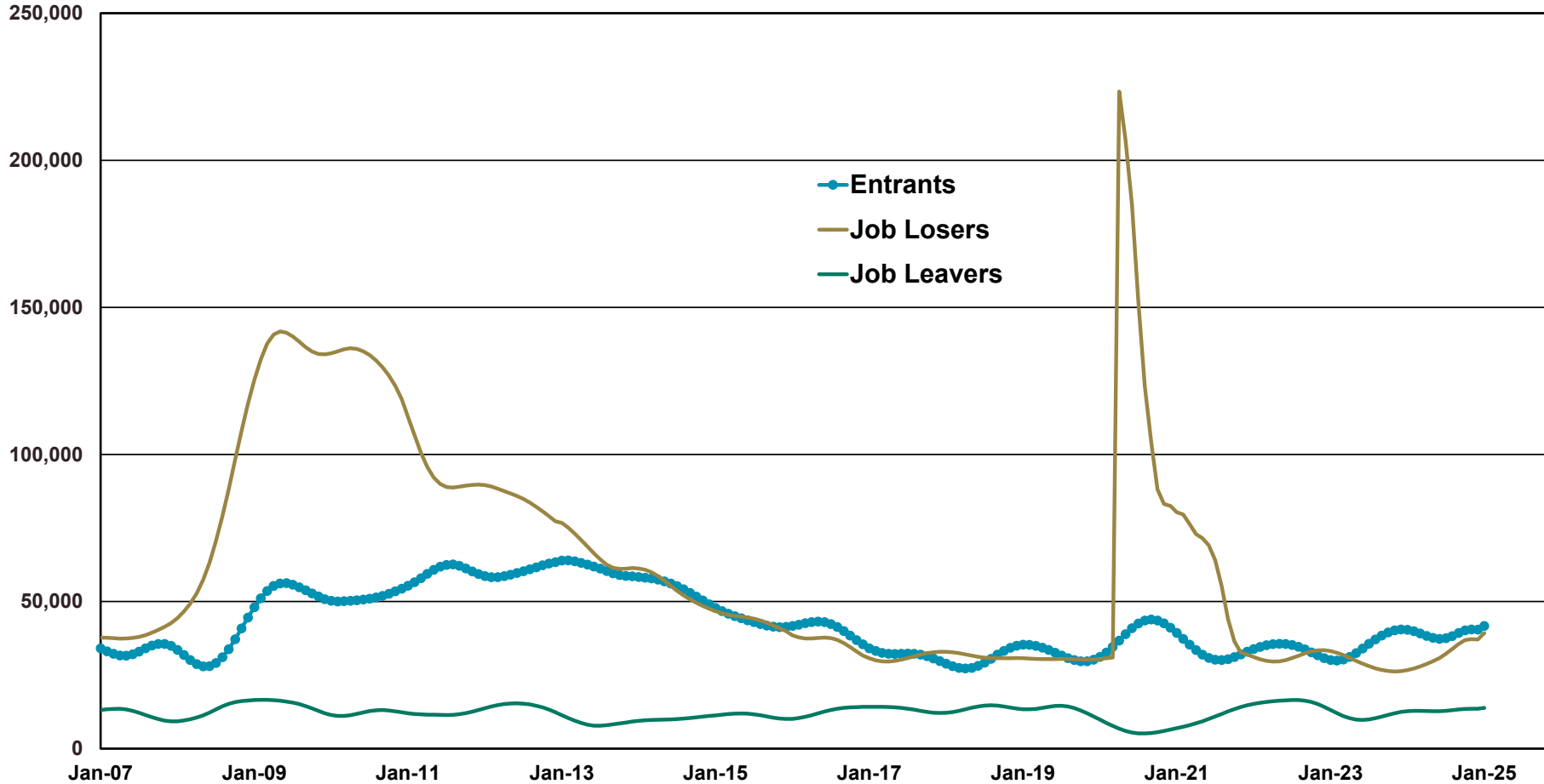
Current Rate (December 2024), Record High, and Record Low for Each County, Seasonally Adjusted



Source: Oregon Employment Department, Local Area Unemployment Statistics

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



Source: Oregon Employment Department, Current Population Survey

New or returning to the workforce
41,700 (44%)

Lost job
39,300 (41%)

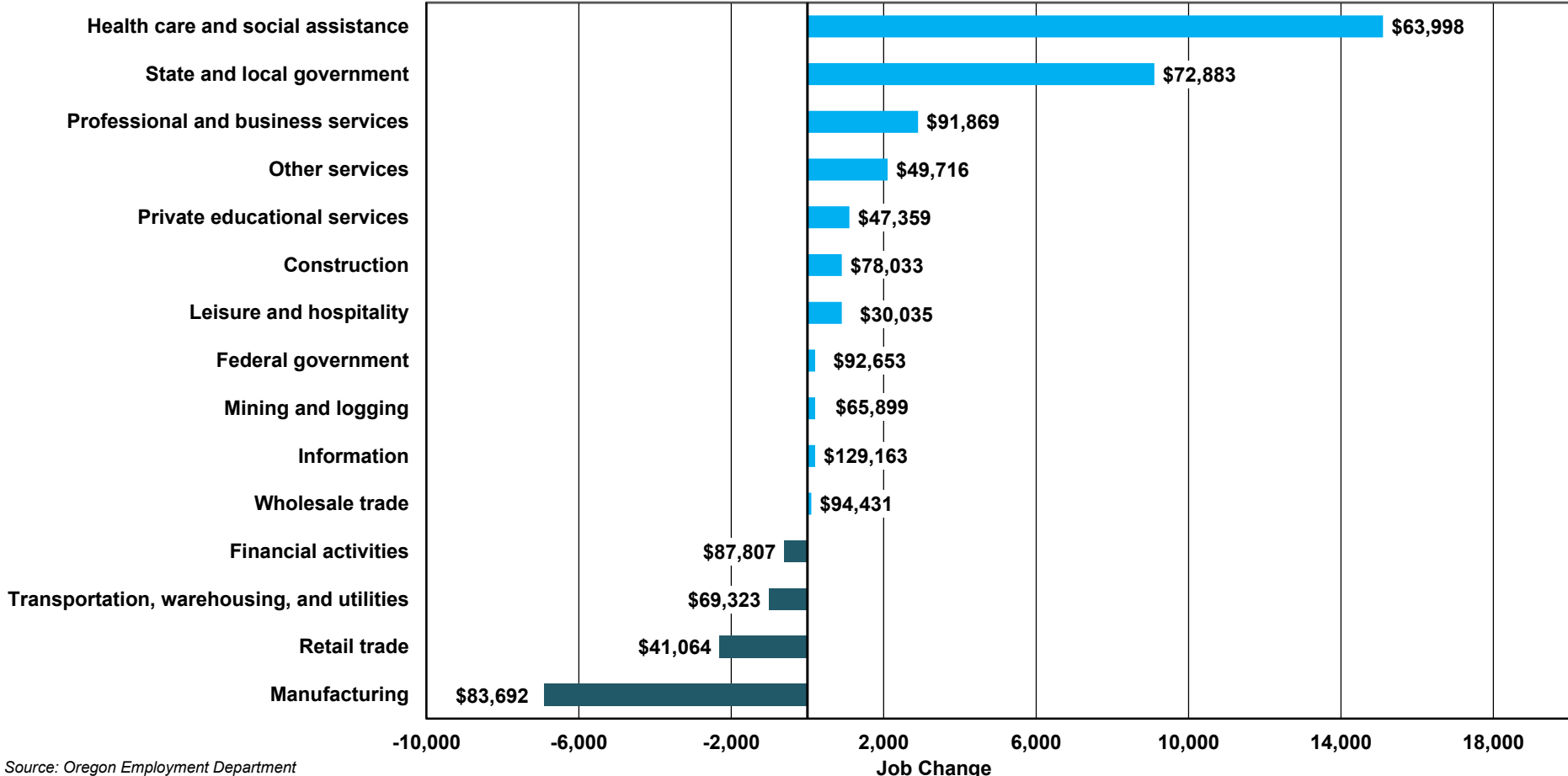
Left job voluntarily
13,900 (15%)

JOB GROWTH BY INDUSTRY

Current Employment Statistics (CES)

OREGON'S JOB GAINS HAVE BEEN CONCENTRATED IN HEALTH CARE AND SOCIAL ASSISTANCE .

Oregon Job Change and Average Pay by Industry
January 2024 - January 2025 Job Change, 2023 Average Pay

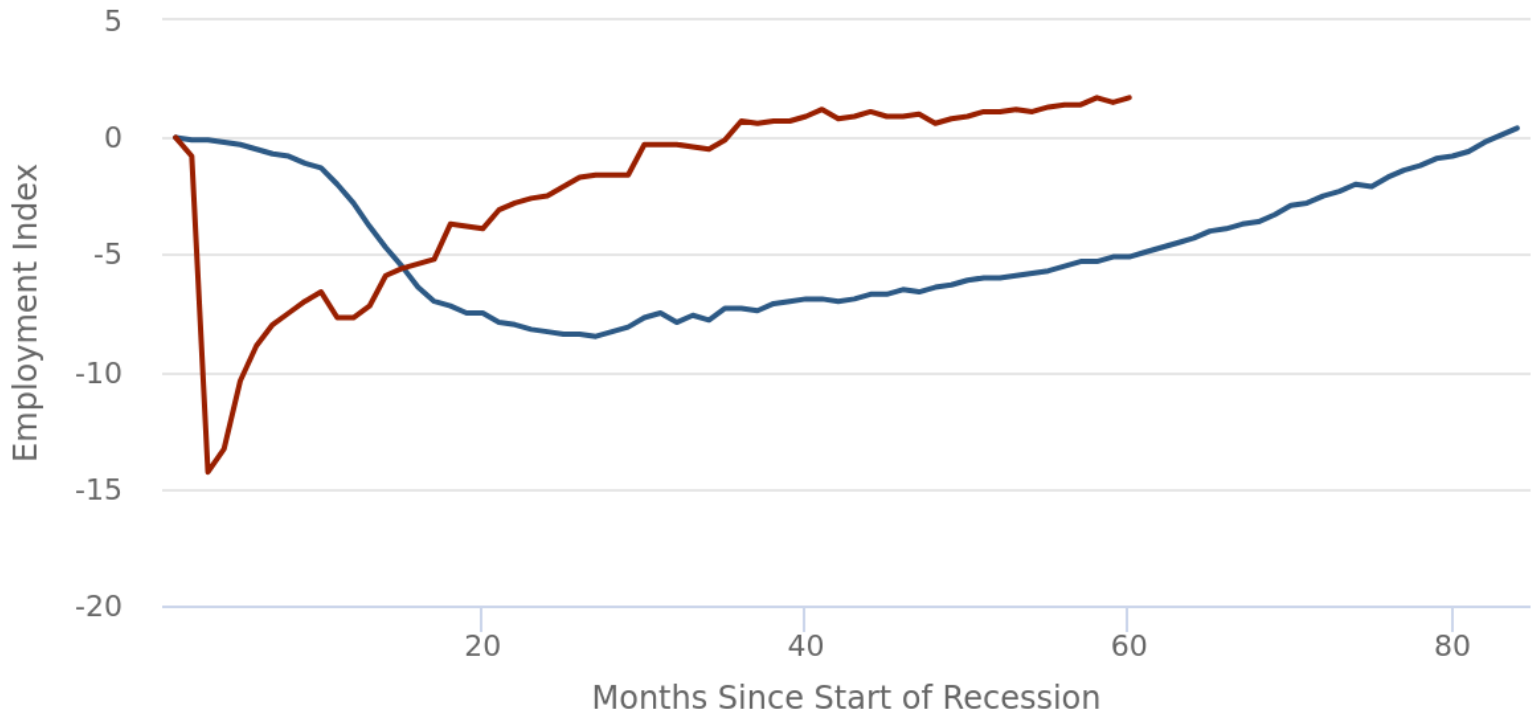


Source: Oregon Employment Department

OREGON'S EMPLOYMENT IS UP 1.1% OR 22,000 OVER THE PAST YEAR. OREGON'S EMPLOYMENT IS 1.7% OR 32,900 JOBS ABOVE ITS PRE-PANDEMIC LEVEL.

COVID-19 Job Changes Compared to Great Recession Job Changes

by Industry
Total Nonfarm, Oregon

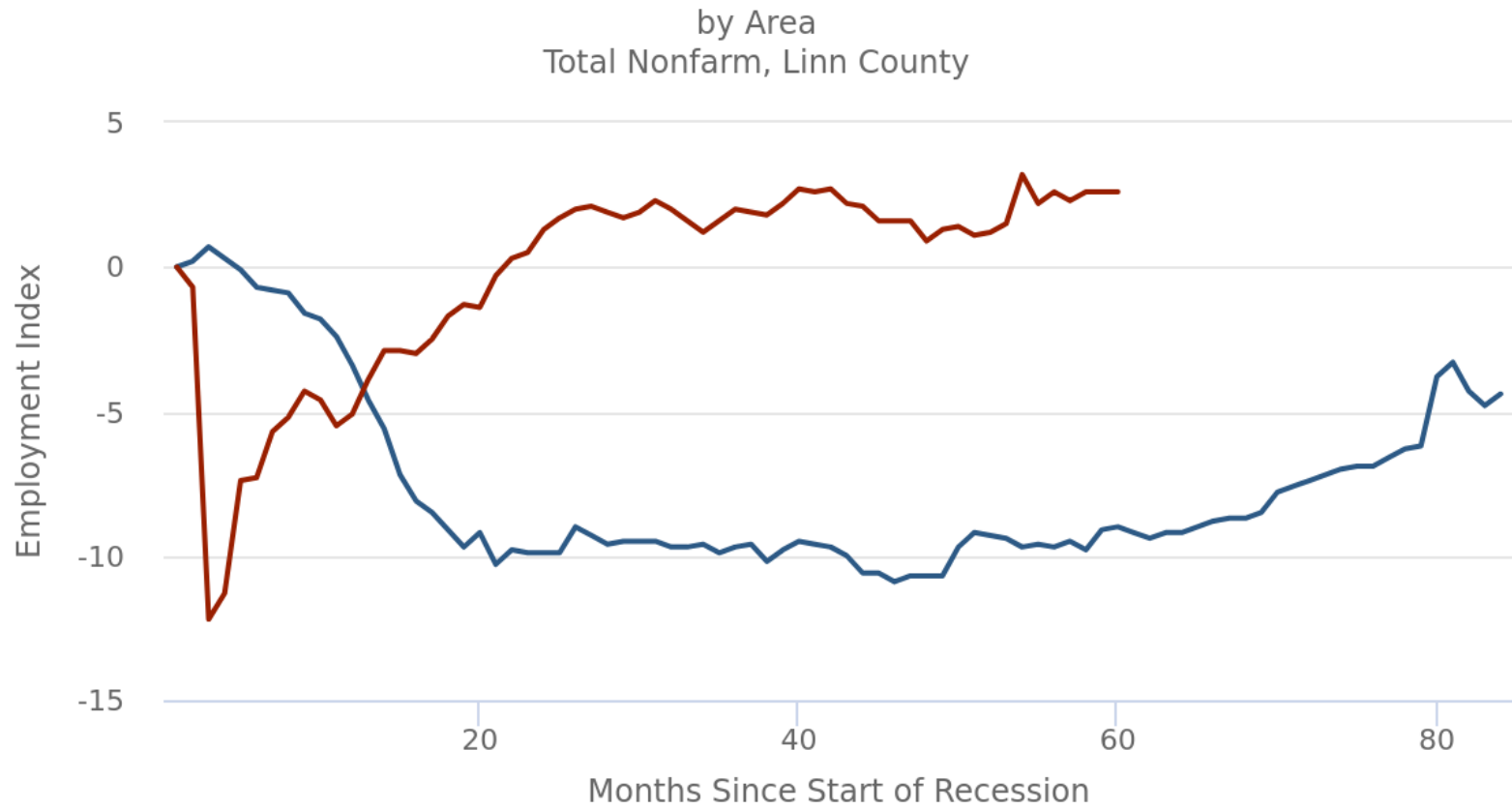


— Great Recession, 2007-2009 — COVID-19

Source: Oregon Employment Department QualityInfo.org

LINN COUNTY HAS ADDED 790 JOBS OVER THE PAST YEAR, GROWING 1.7%. LINN COUNTY IS 2.6% OR 1,210 JOBS ABOVE ITS PRE-PANDEMIC LEVEL.

COVID-19 Job Changes Compared to Great Recession Job Changes

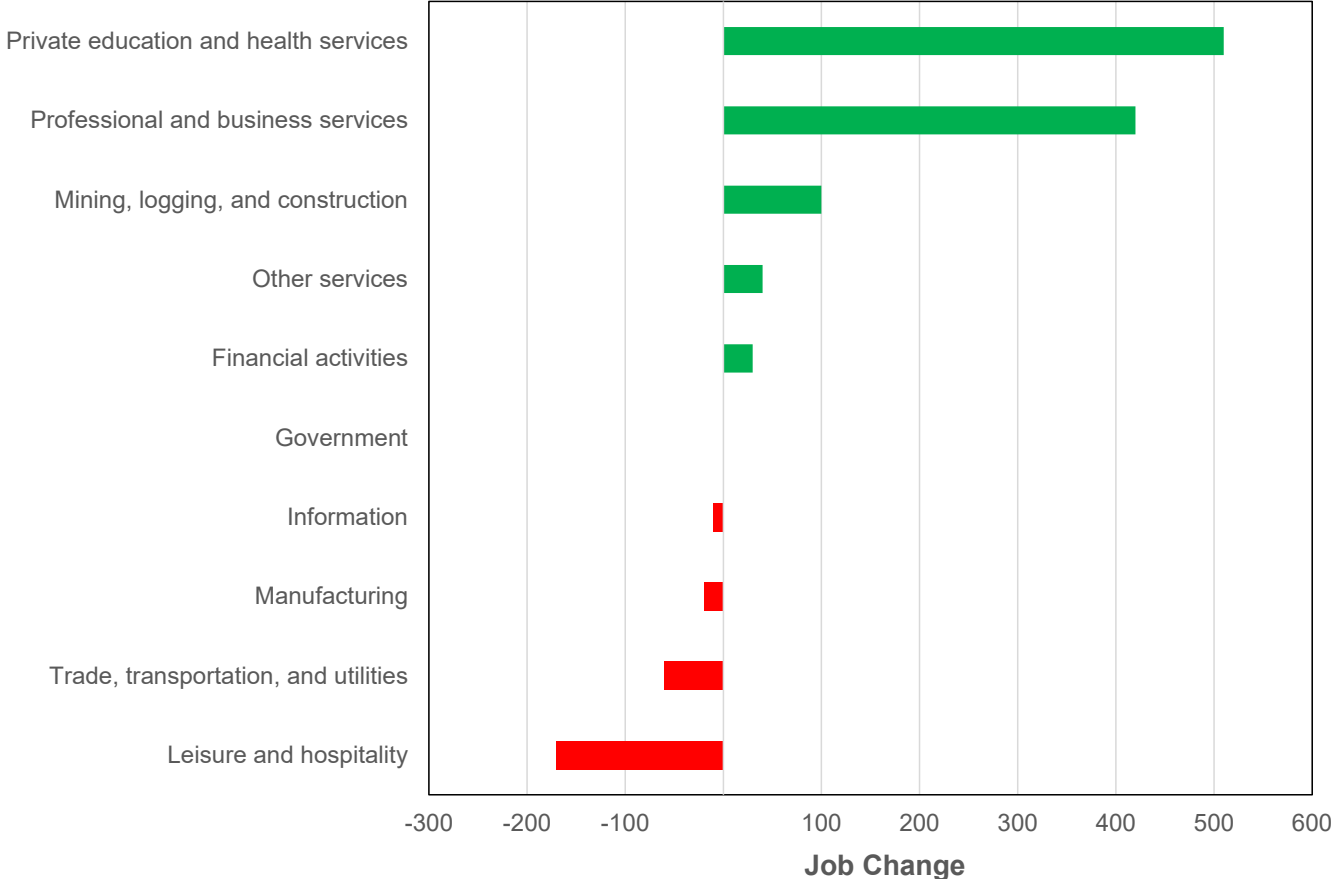


— Great Recession, 2007-2009 — COVID-19

Source: Oregon Employment Department QualityInfo.org

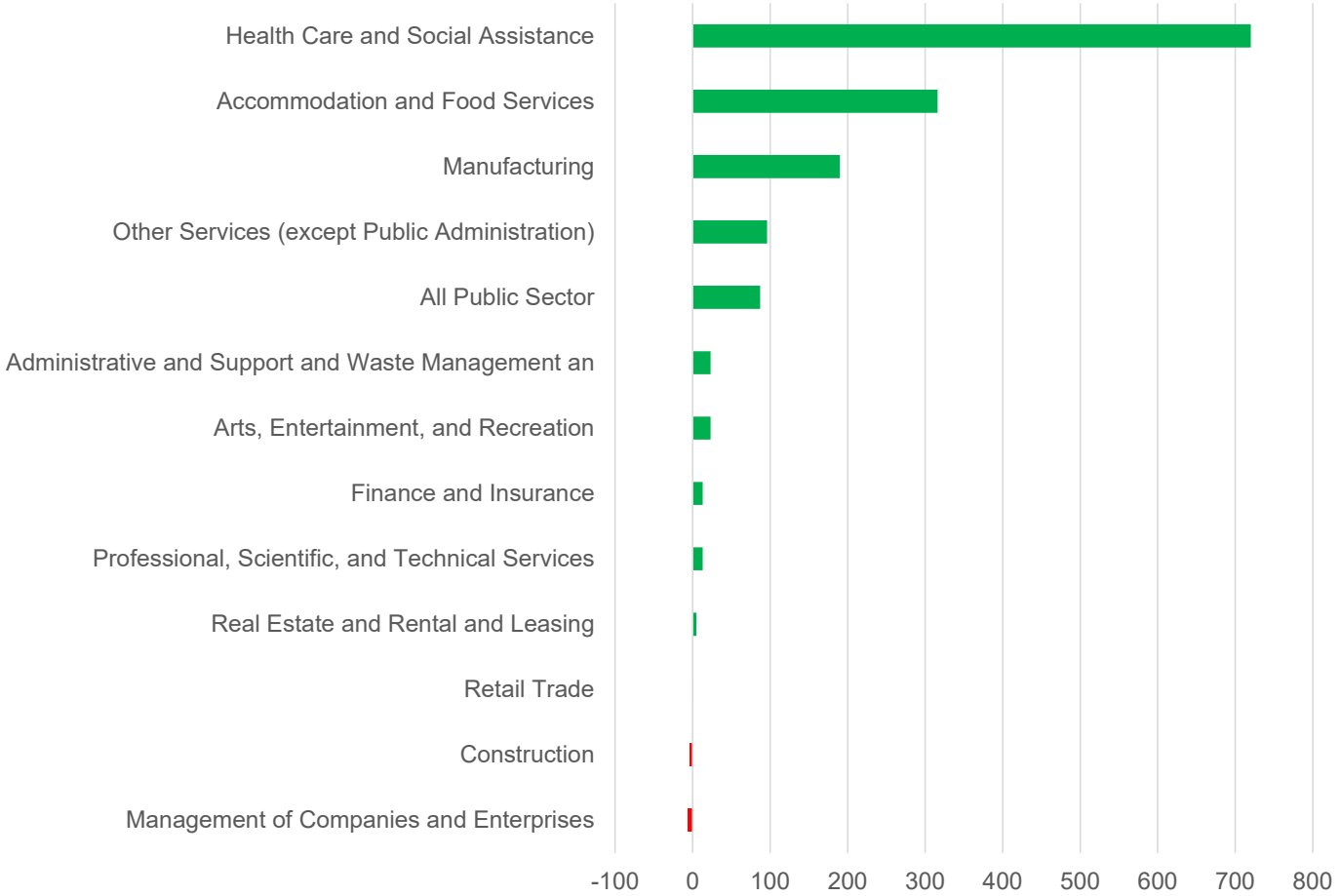
EMPLOYMENT GAINS IN HEALTH CARE AND PROFESSIONAL AND BUSINESS SERVICES HAVE OUTPACED LOSSES IN LEISURE AND HOSPITALITY. LINN COUNTY'S TOTAL EMPLOYMENT IS UP 790 OR 1.7% OVER THE PAST YEAR.

Linn County Employment Change: January 2024 - January 2025



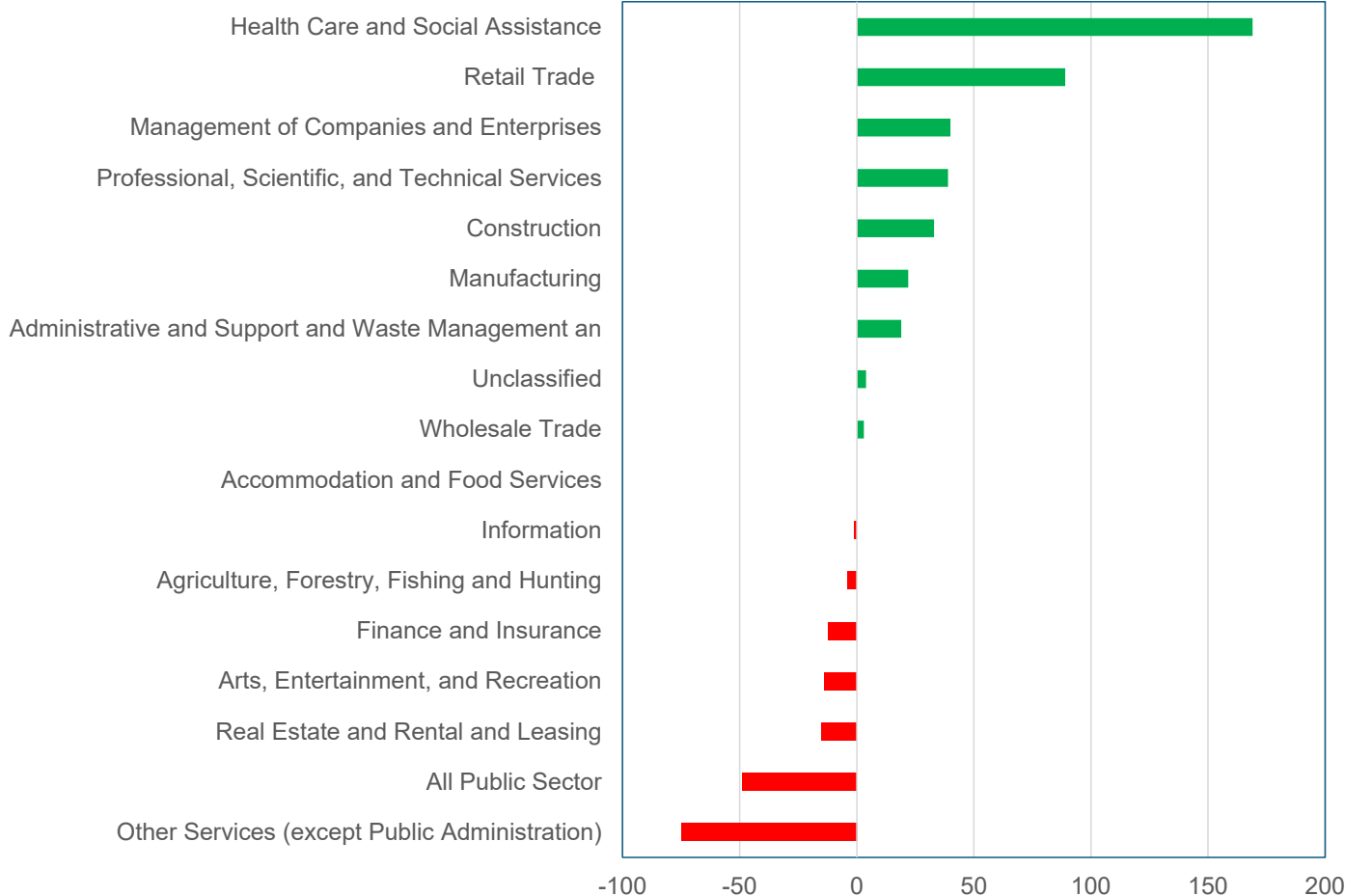
Lebanon added nearly 1,900 jobs from 2007 to 2019. The private sector grew 42% and the public sector grew 11%. Linn County's private sector grew 14% over that time.

Lebanon Employment Change: 2007-2019



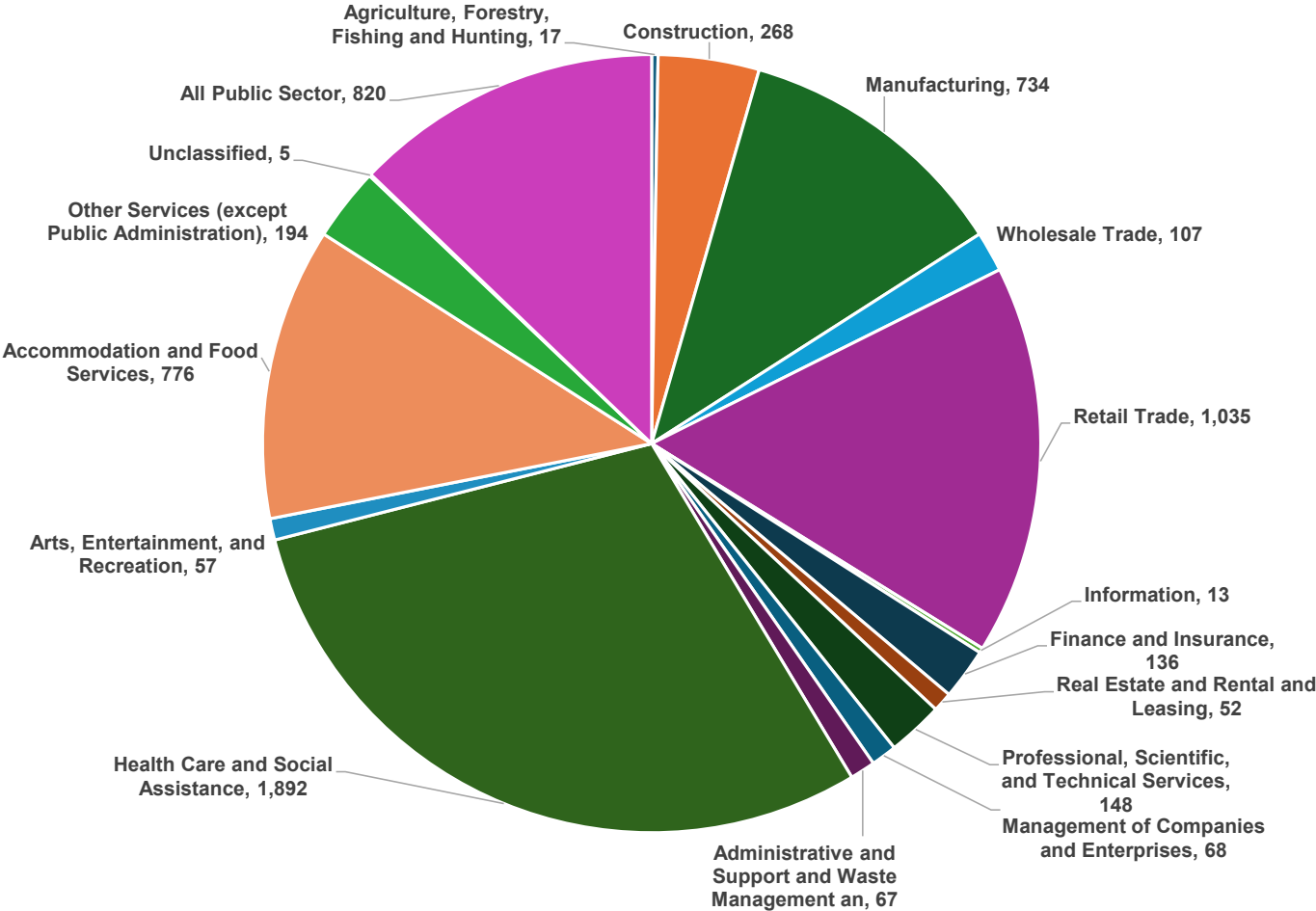
Lebanon added 140 jobs from 2019 to 2023, growing 2%. The private sector added 190 jobs. The public sector lost 50 jobs.

Lebanon Employment Change: 2019-2023

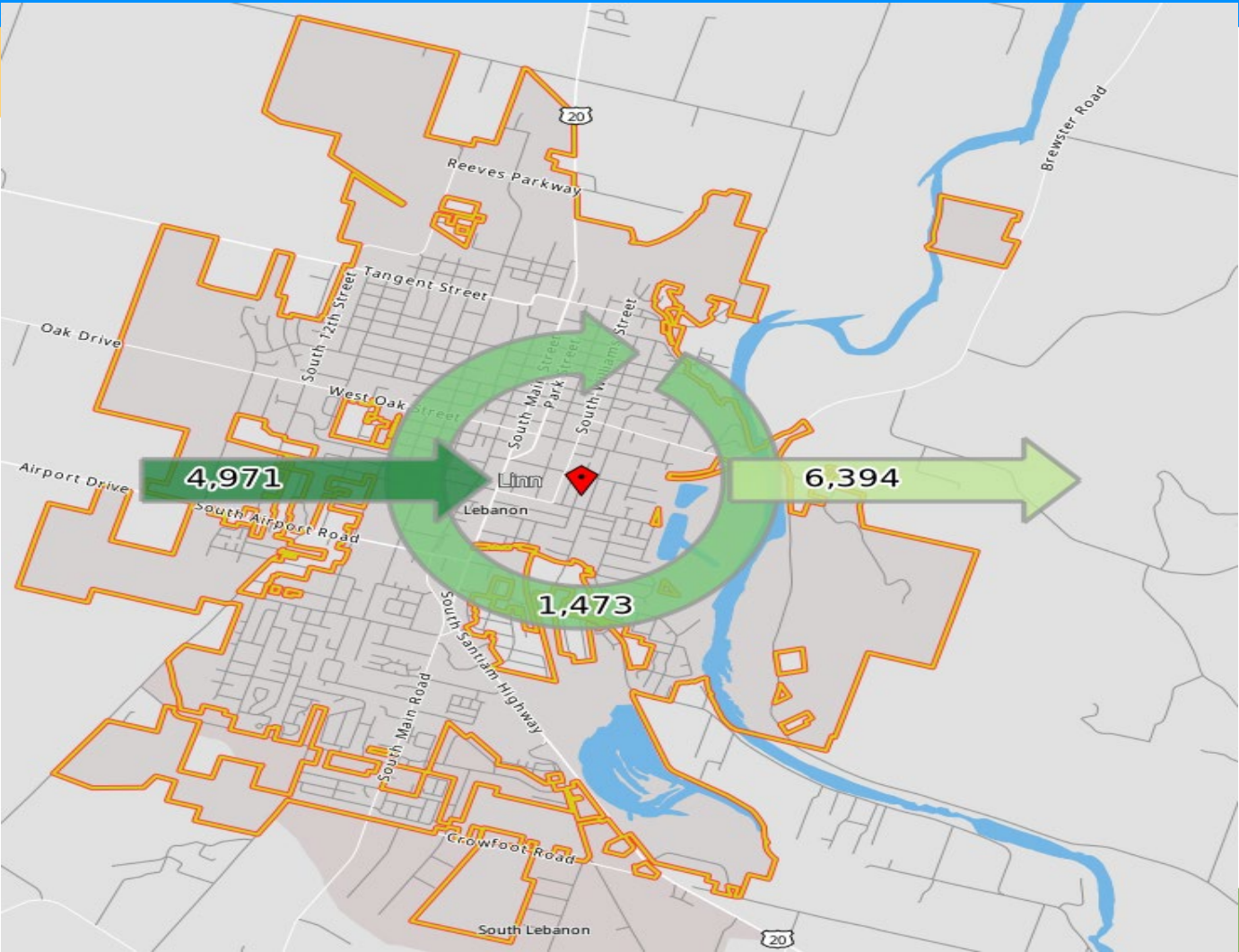


Health care and social assistance comprises 30% of Lebanon's private sector employment. Retail trade comprises 17% and manufacturing makes up 12%.

Lebanon Employment by Industry: 2023



Lebanon has a net outflow of working residents.



Lebanon's working residents work throughout the Willamette Valley.

Job Counts by Counties Where Lebanon Residents are Employed

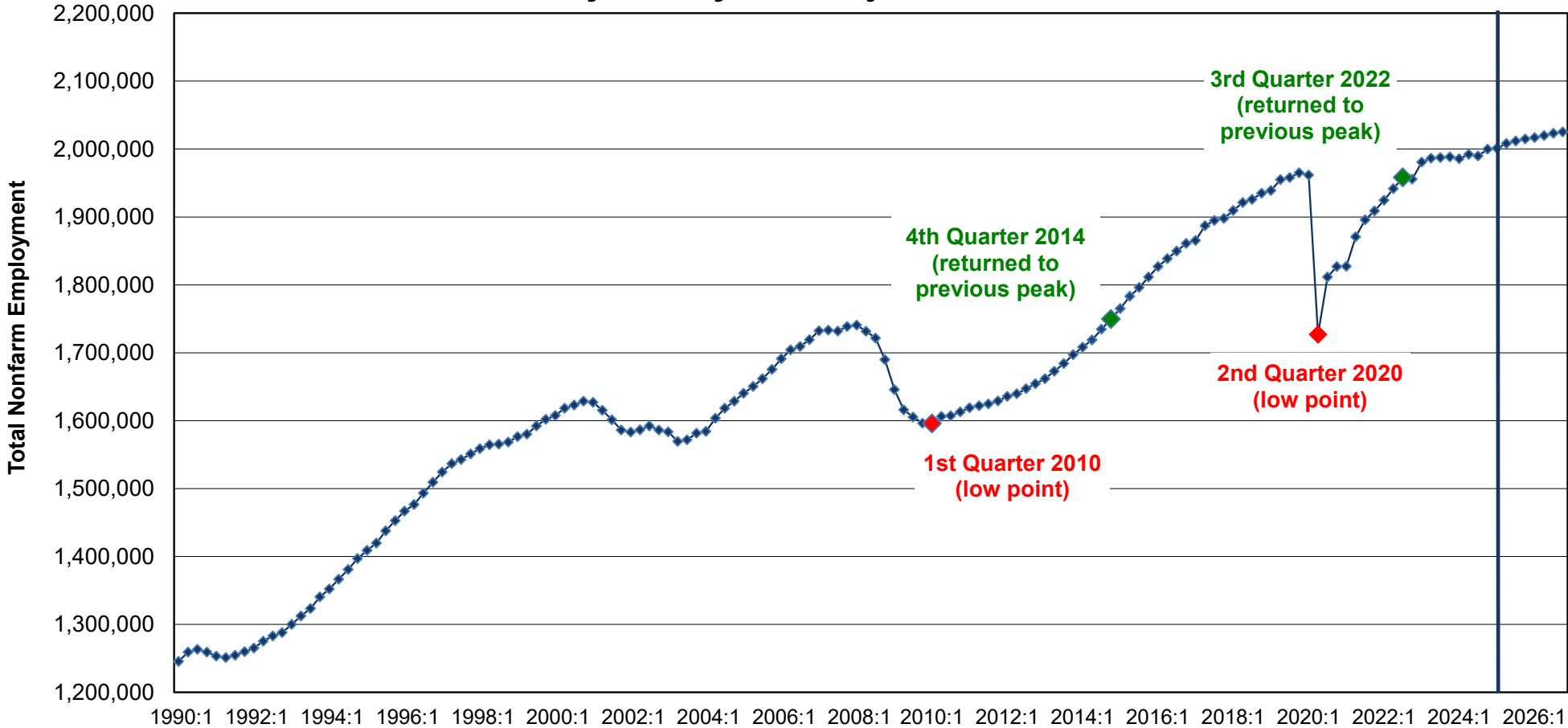
	2022	
	Count	Share
Total Primary Jobs	7,867	100.0%
Linn County, OR	3,798	48.3%
Marion County, OR	913	11.6%
Benton County, OR	905	11.5%
Lane County, OR	644	8.2%
Multnomah County, OR	370	4.7%
Washington County, OR	309	3.9%
Clackamas County, OR	206	2.6%
Polk County, OR	110	1.4%
Deschutes County, OR	89	1.1%
Yamhill County, OR	84	1.1%
All Other Locations	439	5.6%

Nearly two-thirds of people that work in Lebanon live in Linn County.

Job Counts by Counties Where Lebanon's Workers Live

	2022	
	Count	Share
Total Primary Jobs	6,444	100.0%
Linn County, OR	4,094	63.5%
Benton County, OR	459	7.1%
Marion County, OR	457	7.1%
Lane County, OR	335	5.2%
Multnomah County, OR	135	2.1%
Washington County, OR	135	2.1%
Clackamas County, OR	105	1.6%
Deschutes County, OR	90	1.4%
Polk County, OR	84	1.3%
Yamhill County, OR	82	1.3%
All Other Locations	468	7.3%

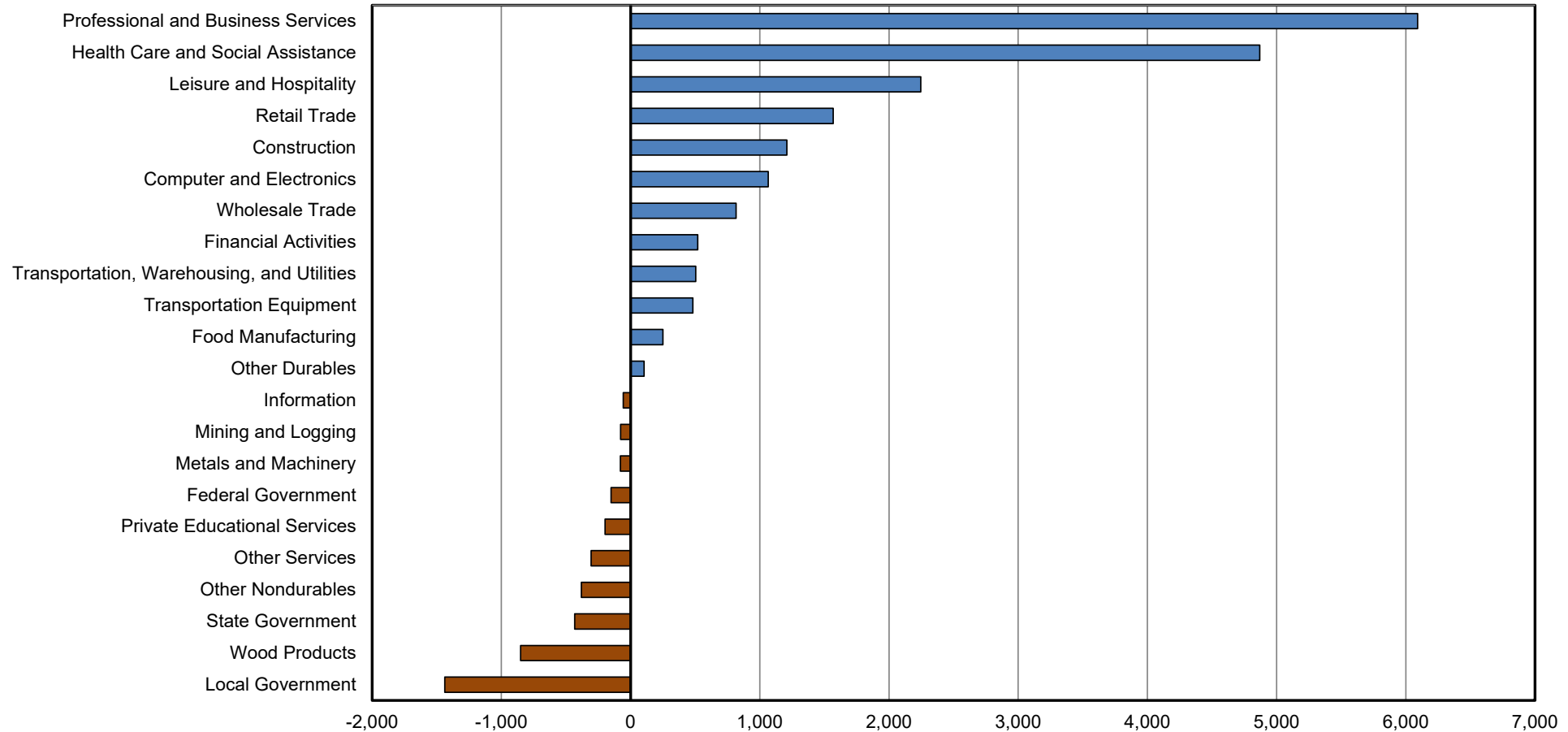
Oregon Nonfarm Payroll Employment Quarterly History and Projection, 1990-2026



Source: Office of Economic Analysis, Department of Administrative Services, March 2025

OEA EXPECTS OREGON TO GAIN ABOUT 15,800 JOBS IN THE NEXT 12 MONTHS.

Expected Job Changes by Industry Sector Over The Year (1Q2025 - 1Q2026)



Source: Oregon Employment Department analysis using Oregon Office of Economic Analysis Forecast, March 2025

Near- to Medium-Term Forecast Risks for Oregon. From the Office of Economic Analysis Economic Forecast.

- Oil Prices: Volatile due to tensions in the Middle East.
- Trade Tensions: Oregon key exports manufacturing and agriculture
- Immigration
- Bird flu/pandemic
- Drought, Wildfires, Flooding
- Cascadia Earthquake

OREGON ECONOMIC RISKS (CONTINUED)

- Persistent inflation
- Federal fiscal policy
- Productivity/ AI
- New Business Formation: declining number of new businesses in Oregon
- Slow Migration to Oregon



Linn and Benton Counties' Future Workforce Needs

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.

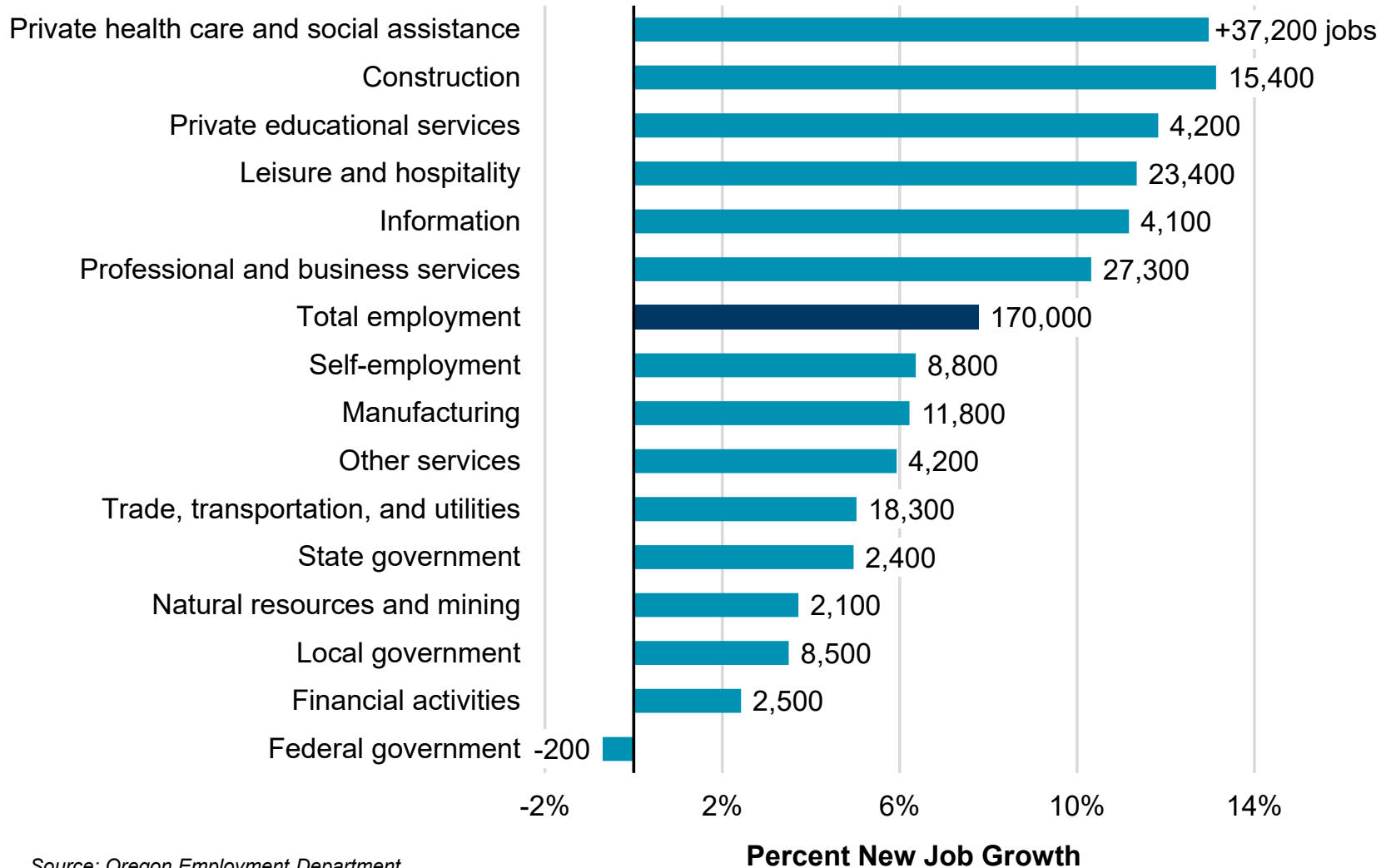
- Growth in construction is driven by strong projected growth in the specialty trades industry.

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.

HEALTH CARE AND SOCIAL ASSISTANCE LEADS LONG-TERM INDUSTRY GROWTH.

**Health Care and Social Assistance Leads Long-Term Employment Growth
Oregon Industry Projections, 2023-2033**



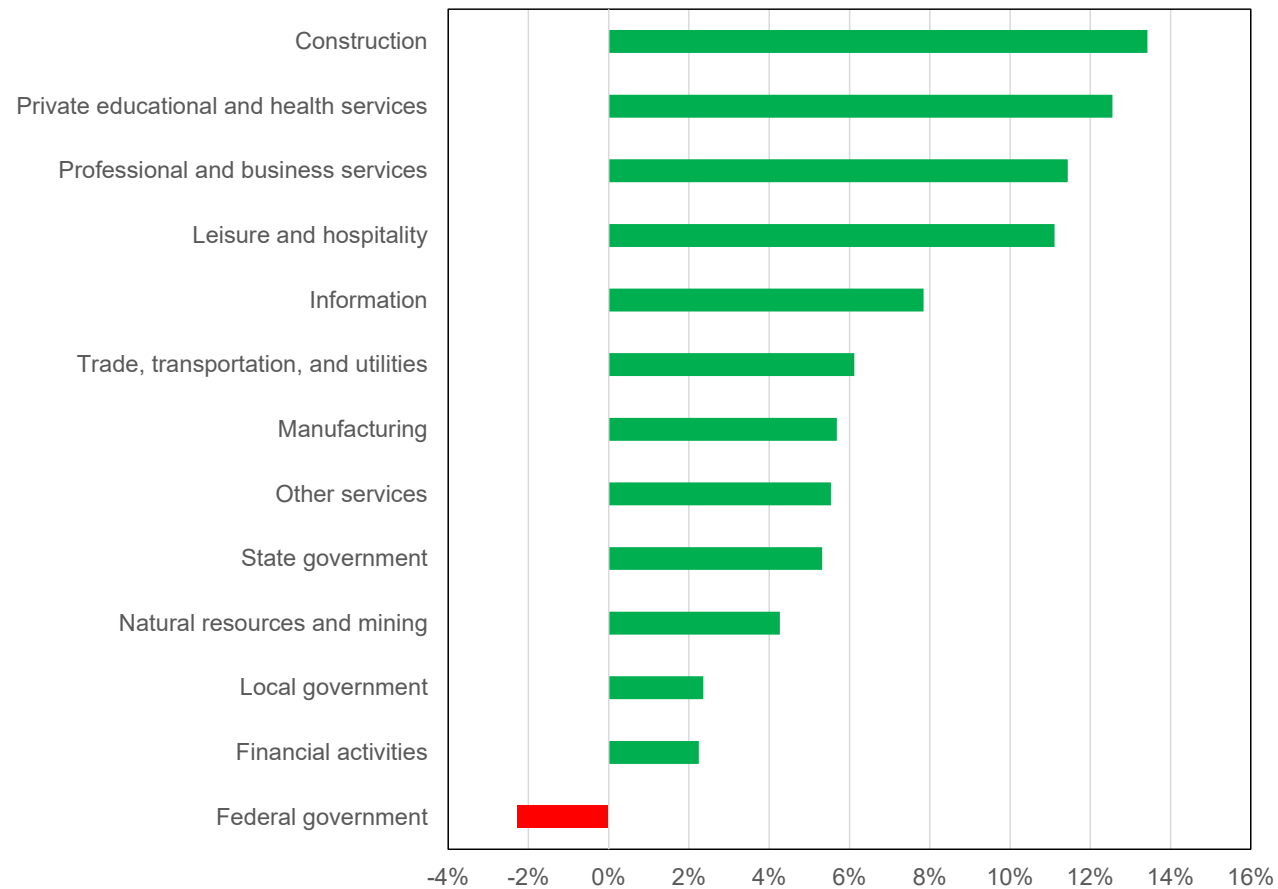
Health care and social assistance and construction are projected to grow the fastest (13% each).

Health care and social assistance is also projected to add the largest number of jobs over the decade.

Growth in leisure and hospitality is driven by recovery from the pandemic.

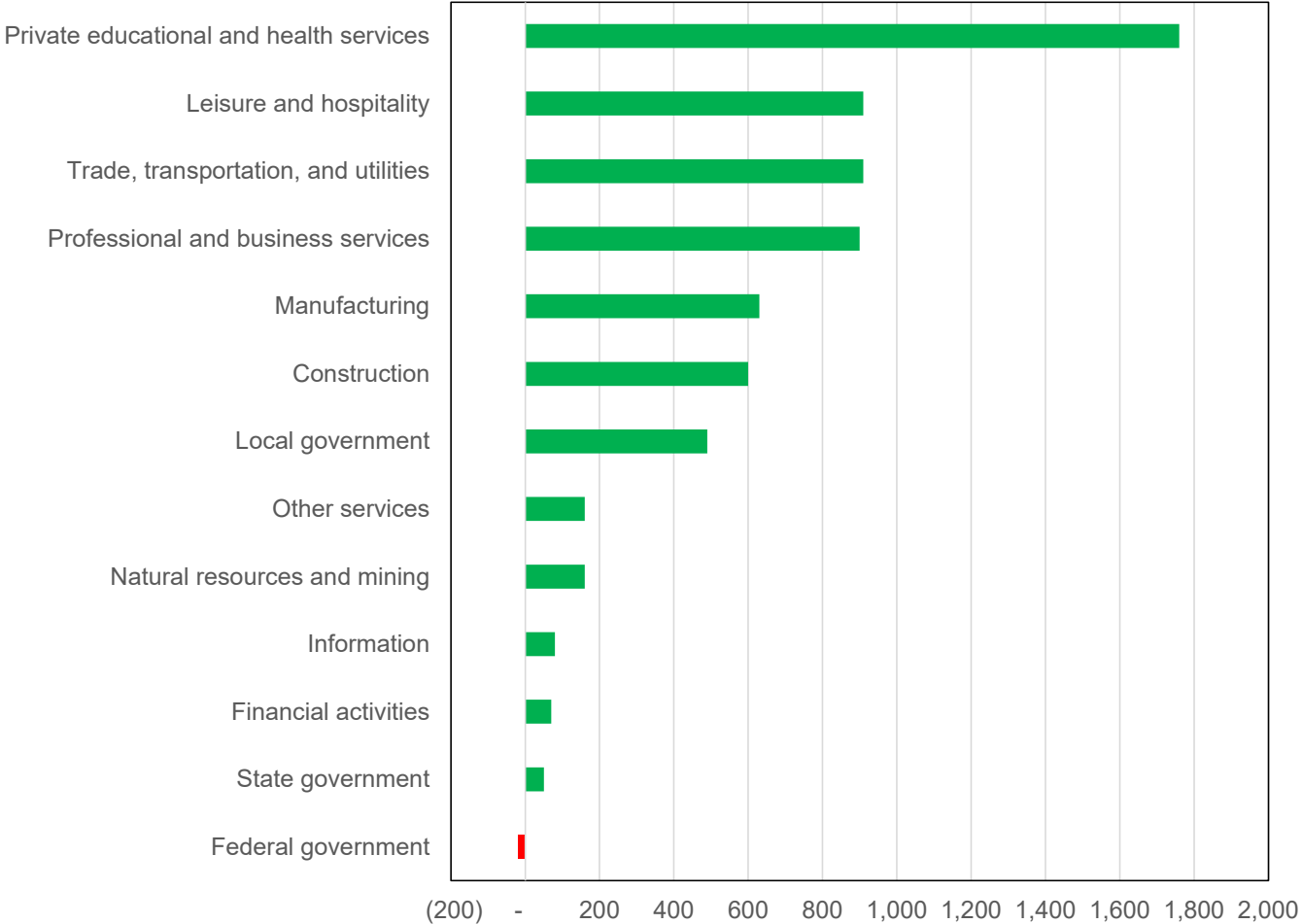
SIMILAR TO OREGON, LINN AND BENTON COUNTIES' FASTEST GROWING INDUSTRIES ARE CONSTRUCTION AND HEALTH CARE.

Linn-Benton Industry Employment Projections: 2023-2033



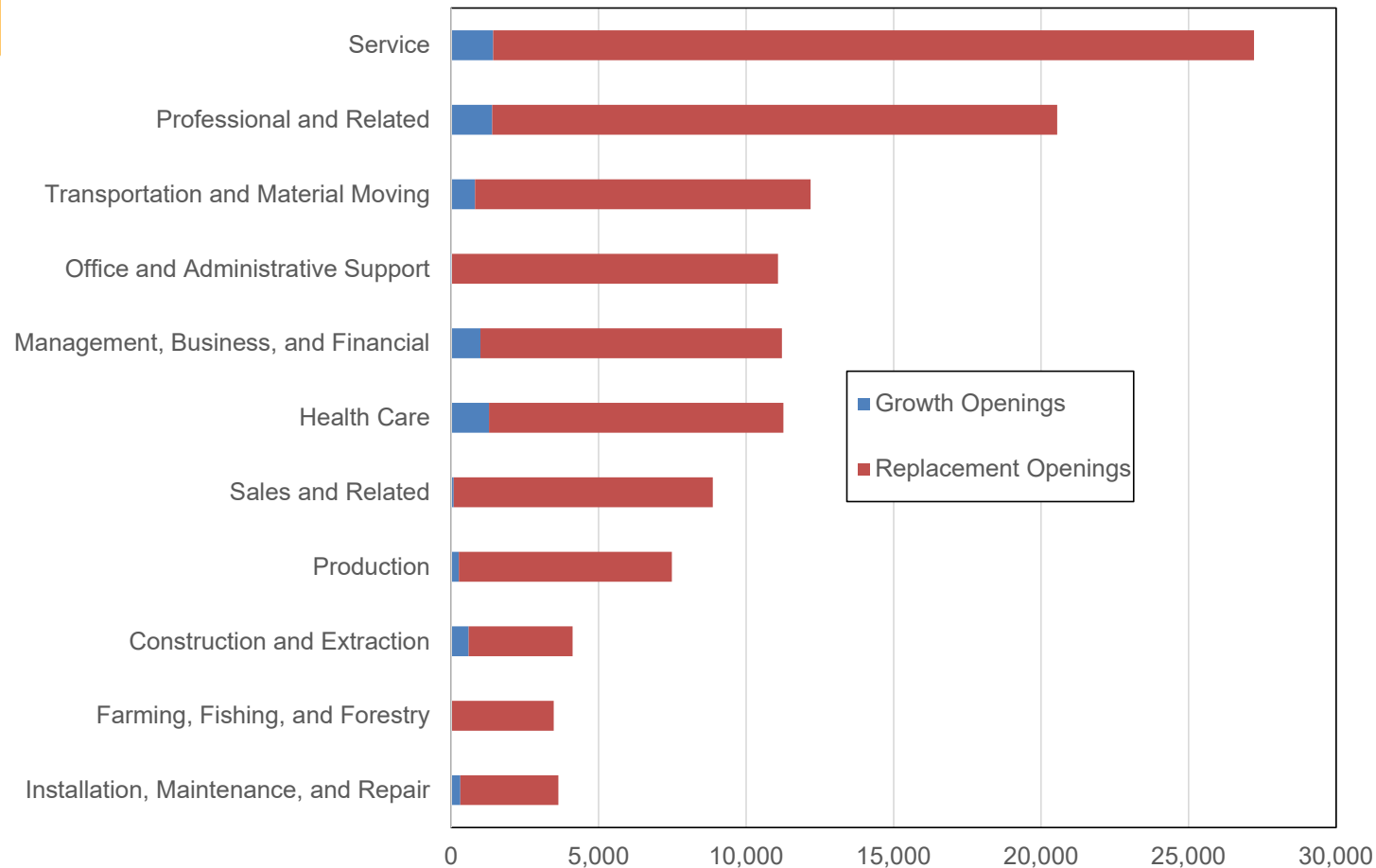
HEALTH CARE IS PROJECTED TO ADD THE MOST JOBS IN LINN AND BENTON COUNTIES.

Linn-Benton Industry Employment Projections: 2023-2033



MORE THAN 9 IN 10 (94%) OF JOB OPENINGS IN LINN AND BENTON COUNTIES ARE REPLACEMENT OPENINGS.

2023-2033 Job Openings in Linn and Benton Counties

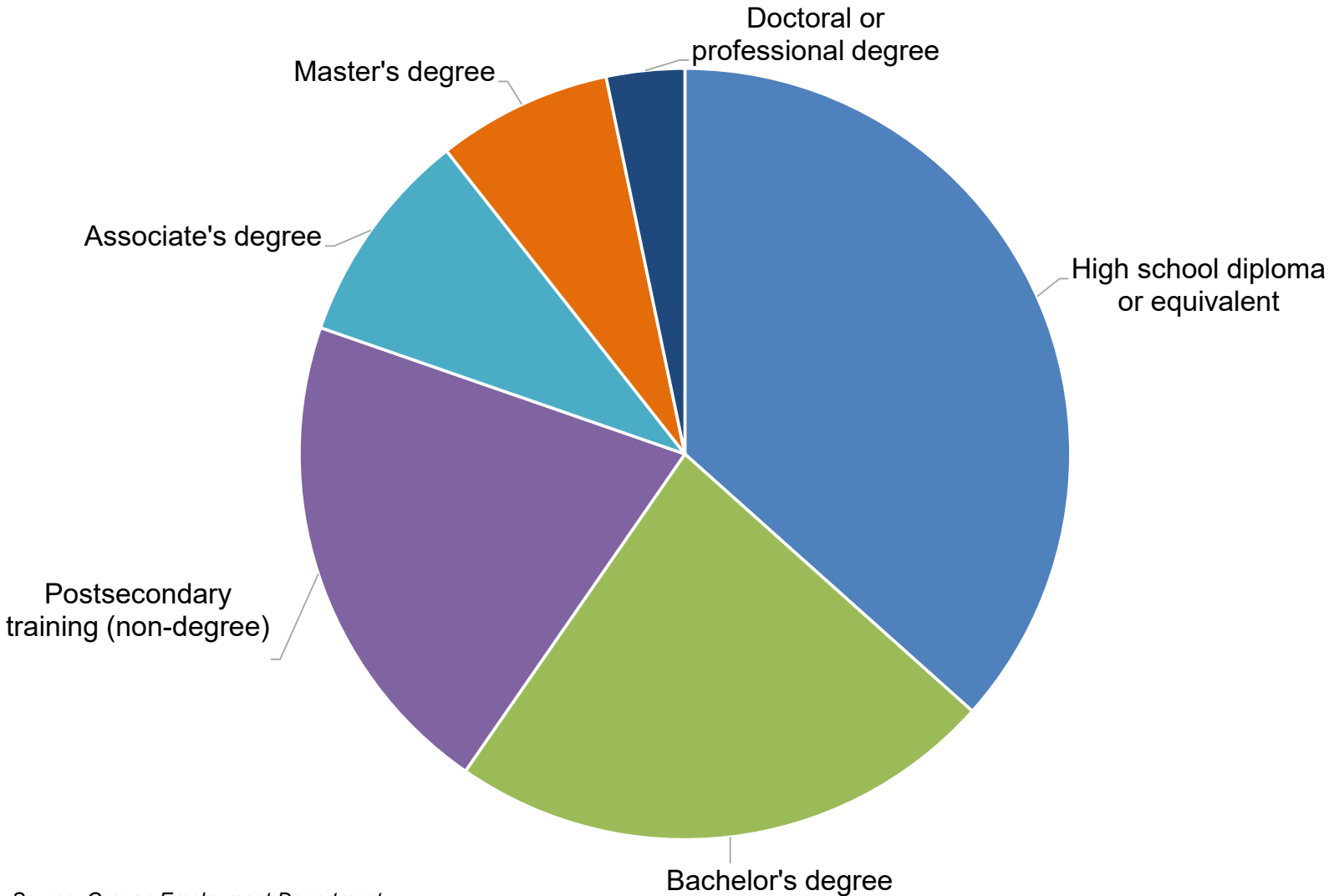


LINN-BENTON COUNTIES OCCUPATIONAL PROJECTIONS FOR THOSE THAT LIKE TO SEE THE NUMBERS.

	Employment 2023	Projected Employment 2033	Percent Change	Employment Change	Replacement Openings	Total Openings
Service	14,459	15,880	9.8%	1,421	25,802	27,223
Professional and Related	22,480	23,873	6.2%	1,393	19,154	20,547
Transportation and Material Moving	8,440	9,247	9.6%	807	11,378	12,185
Health Care	9,665	10,950	13.3%	1,285	9,981	11,266
Management, Business, and Financial	12,121	13,108	8.1%	987	10,223	11,210
Office and Administrative Support	10,136	10,012	-1.2%	-124	11,079	10,955
Sales and Related	6,400	6,481	1.3%	81	8,790	8,871
Production	6,651	6,909	3.9%	258	7,224	7,482
Construction and Extraction	4,086	4,675	14.4%	589	3,529	4,118
Installation, Maintenance, and Repair	3,661	3,971	8.5%	310	3,326	3,636
Farming, Fishing, and Forestry	2,300	2,328	1.2%	28	3,447	3,475
Total, All Occupations	100,505	107,534	7.0%	7,029	114,090	121,119

SIX OUT OF 10 JOBS REQUIRE EDUCATION BEYOND HIGH SCHOOL TO BE COMPETITIVE.

2023 Employment by Typical Competitive Education



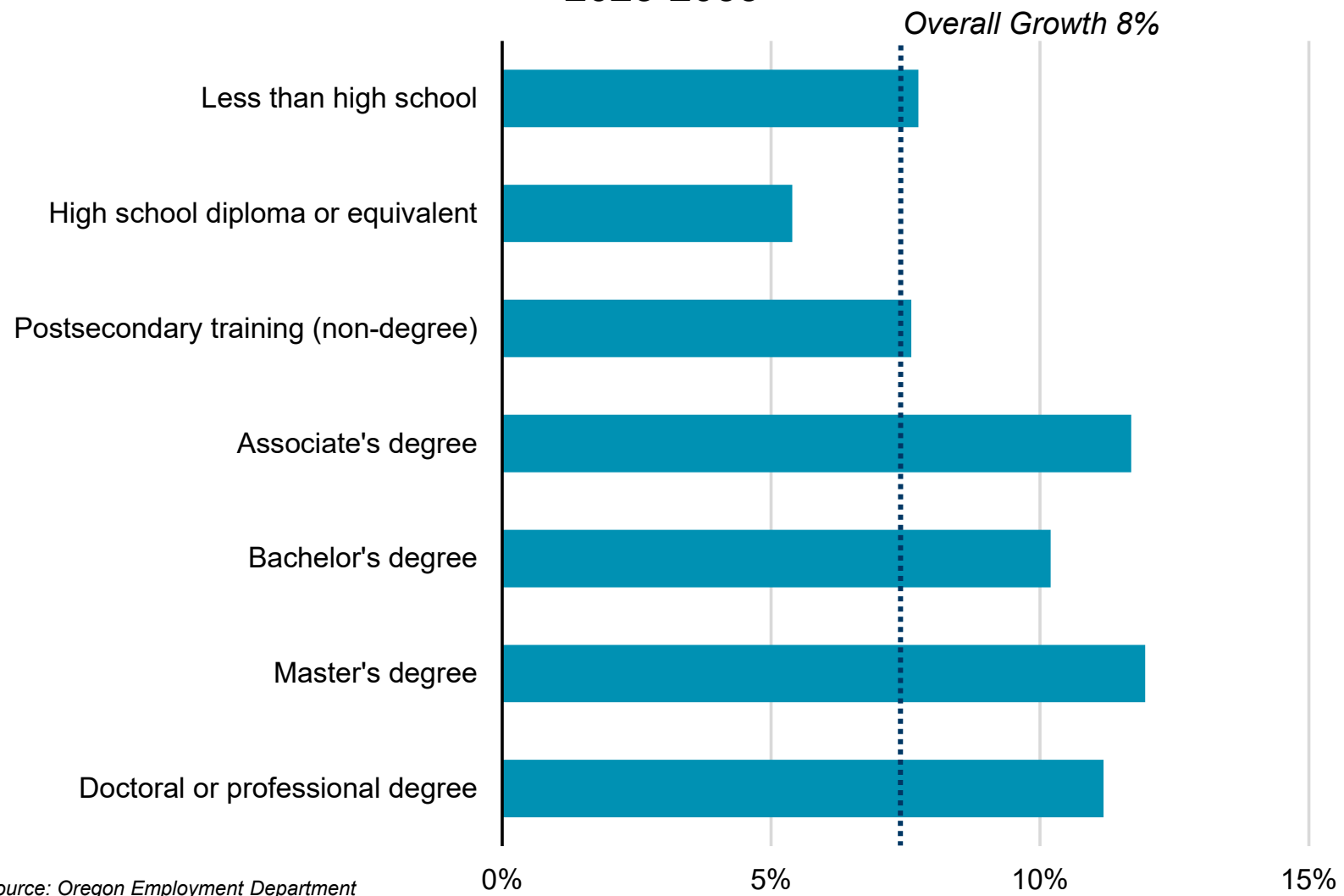
In 2023, six out of 10 jobs in Oregon typically required a minimum of high school education or less.

To meet more competitive requirements for Oregon's jobs, six out of 10 required education beyond high school.

Source: Oregon Employment Department

OCCUPATIONS THAT REQUIRE A MASTER'S DEGREE ARE PROJECTED TO GROW THE FASTEST FROM 2023-2033.

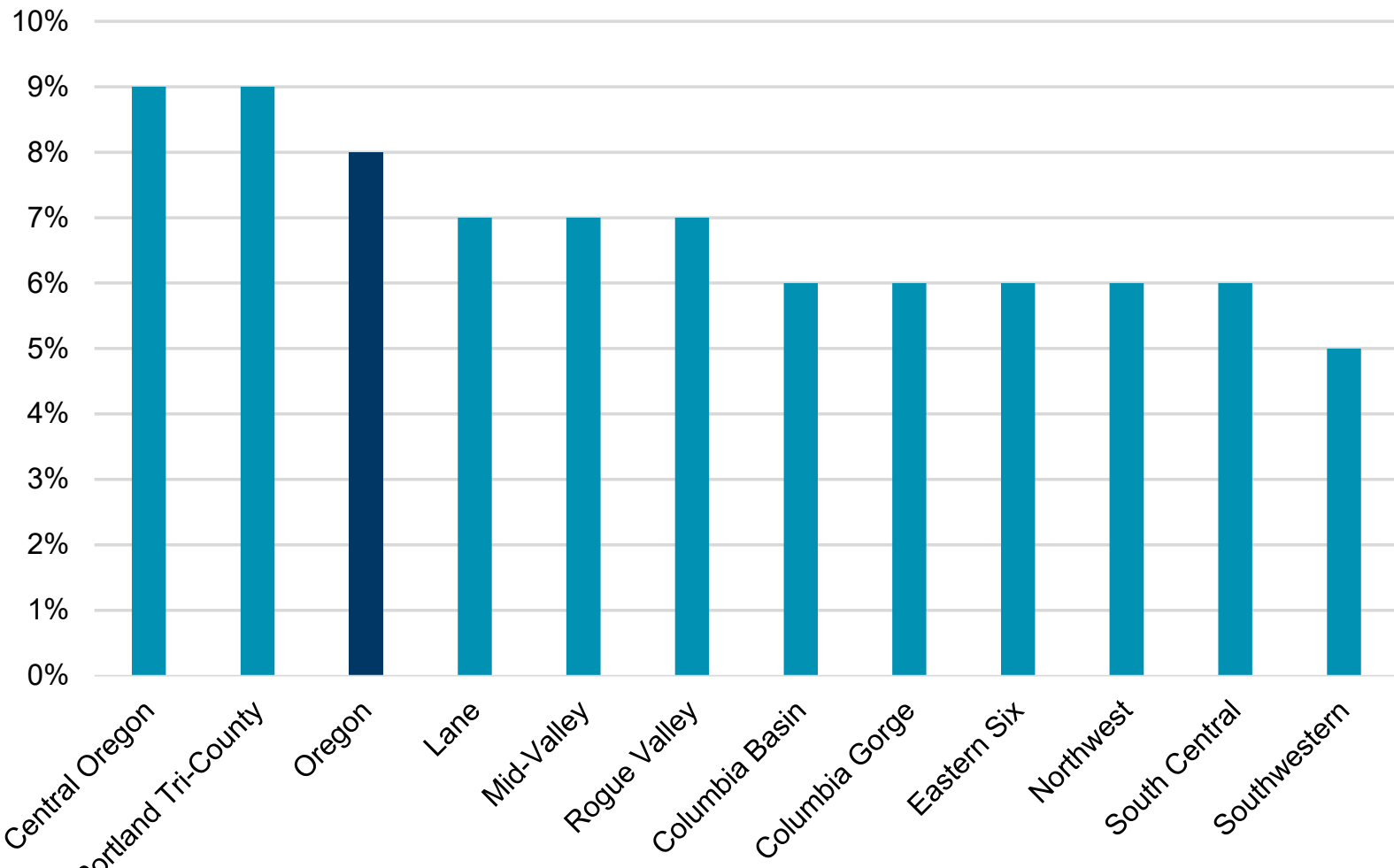
Job Growth by Typical Entry-Level Education, 2023-2033



Occupations that require a master's degree are projected to be the fastest-growing set of occupations, followed by associate's degree occupations, and bachelor's degree occupations.

Source: Oregon Employment Department

Long-Term Employment Growth Led by Central Oregon and Portland Tri-County Regions



The two areas projected to grow faster than Oregon's rate of 8% are Central Oregon (9%) and the Portland Tri-County region (9%).

Linn and Benton Counties is projected to grow 7%.

Southwestern Oregon (5%) is projected to grow the slowest.

Source: Oregon Employment Department

Slowing Population, Labor Force, and Job Growth in Oregon

Updated: June 12, 2024

THE WORKFORCE CONTINUES AGING, IN OREGON AND THE U.S.

Workers Ages 55+ Could Be Within a Decade of Retirement

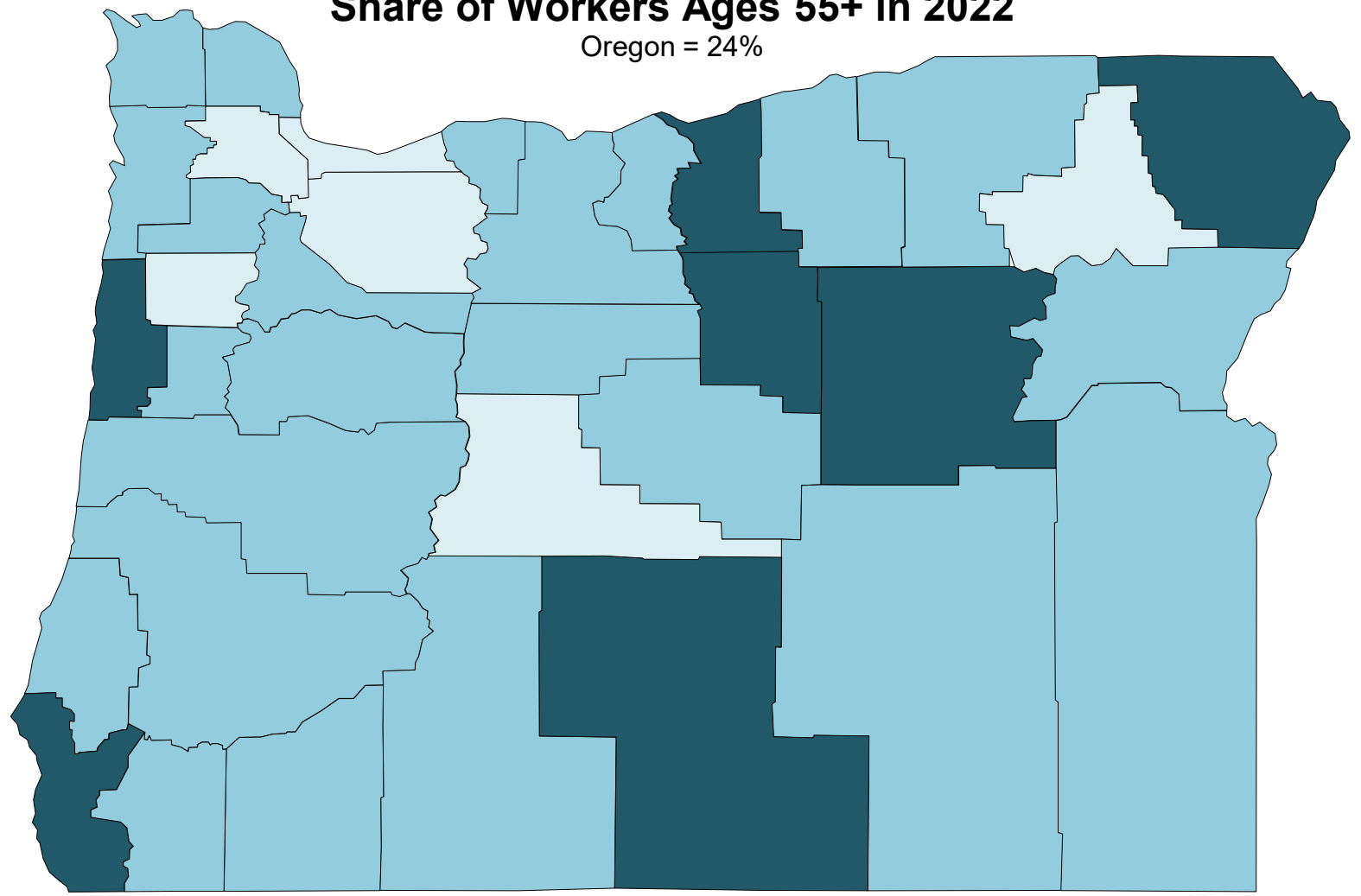
Oregon Jobs in 2022	All Workers	Age 55+	% Age 55+
All Sectors	1,908,164	455,792	24%
Agriculture, Forestry, Fishing and Hunting	52,269	17,026	33%
Mining, Quarrying, and Oil and Gas Extraction	1,787	574	32%
Real Estate and Rental and Leasing	30,756	8,795	29%
Utilities	8,025	2,230	28%
Other Services	65,394	17,780	27%
Public Administration	75,343	20,117	27%
Wholesale Trade	77,229	20,205	26%
Educational Services	144,633	37,806	26%
Manufacturing	188,469	49,178	26%
Transportation and Warehousing	80,059	20,392	25%
Finance and Insurance	55,032	13,480	24%
Health Care and Social Assistance	284,182	69,324	24%
Retail Trade	209,208	47,907	23%
Administrative and Waste Services	108,487	24,775	23%
Construction	122,998	28,005	23%
Professional, Scientific, and Technical Services	111,361	24,248	22%
Arts, Entertainment, and Recreation	29,817	6,345	21%
Management of Companies and Enterprises	51,883	10,705	21%
Information	41,014	7,684	19%
Accommodation and Food Services	170,218	29,216	17%

In the early 1990s, one out of 10 jobs was held by a worker age 55 or older.

By 2022, nearly one-fourth of all jobs in Oregon and the U.S. were held by workers 55+ years old.

Share of Workers Ages 55+ in 2022

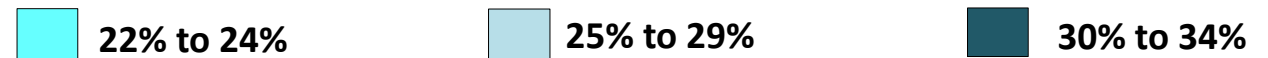
Oregon = 24%



Rural counties tend to have higher shares of workers who may be nearing retirement in the coming years.

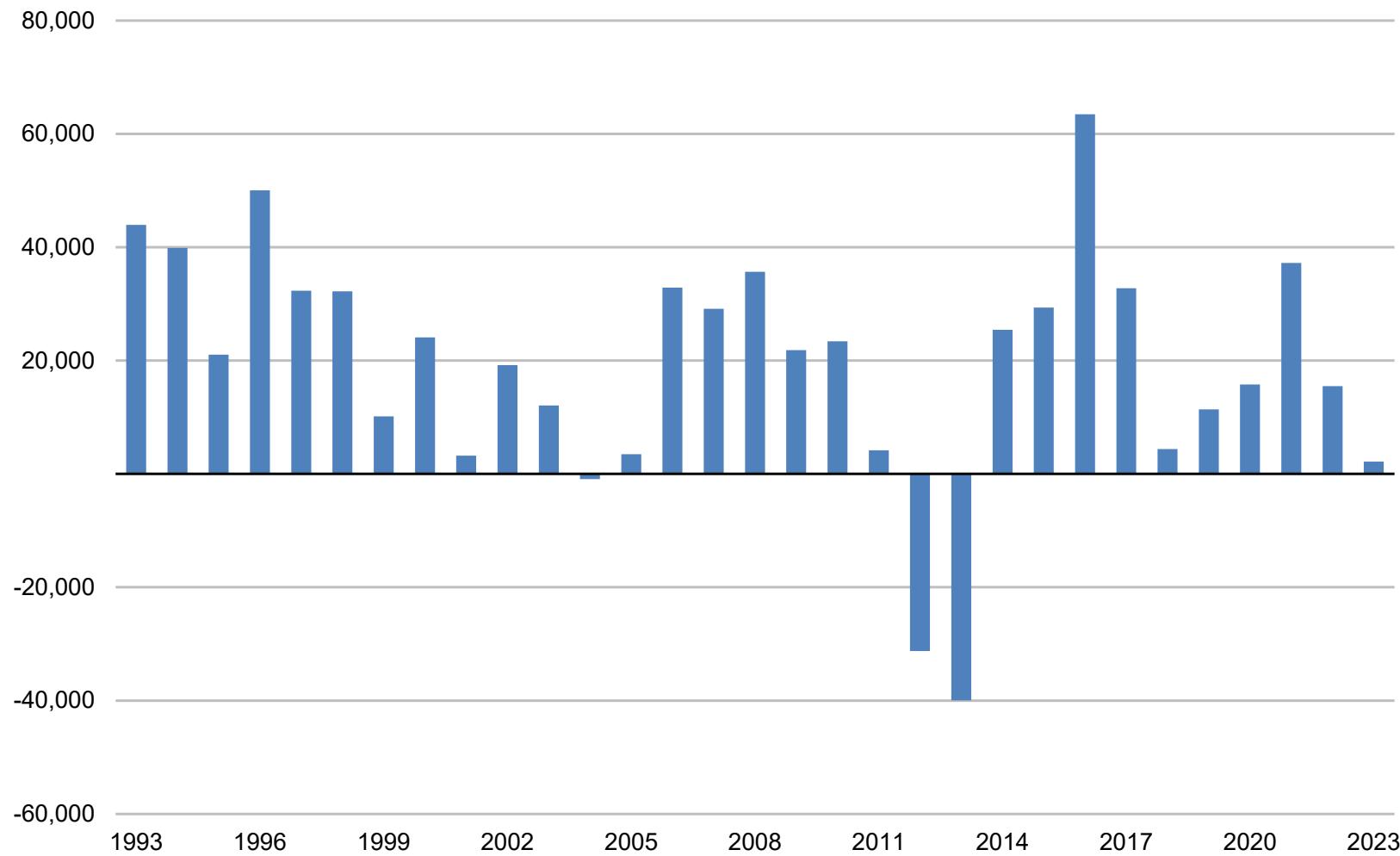
Yet, Multnomah County has more jobs held by workers 55 or older than all rural counties combined.

Source: Oregon Employment Department



OREGON'S LABOR FORCE GROWTH HAS SLOWED.

Annual Labor Force Change in Oregon, 1993 - 2023



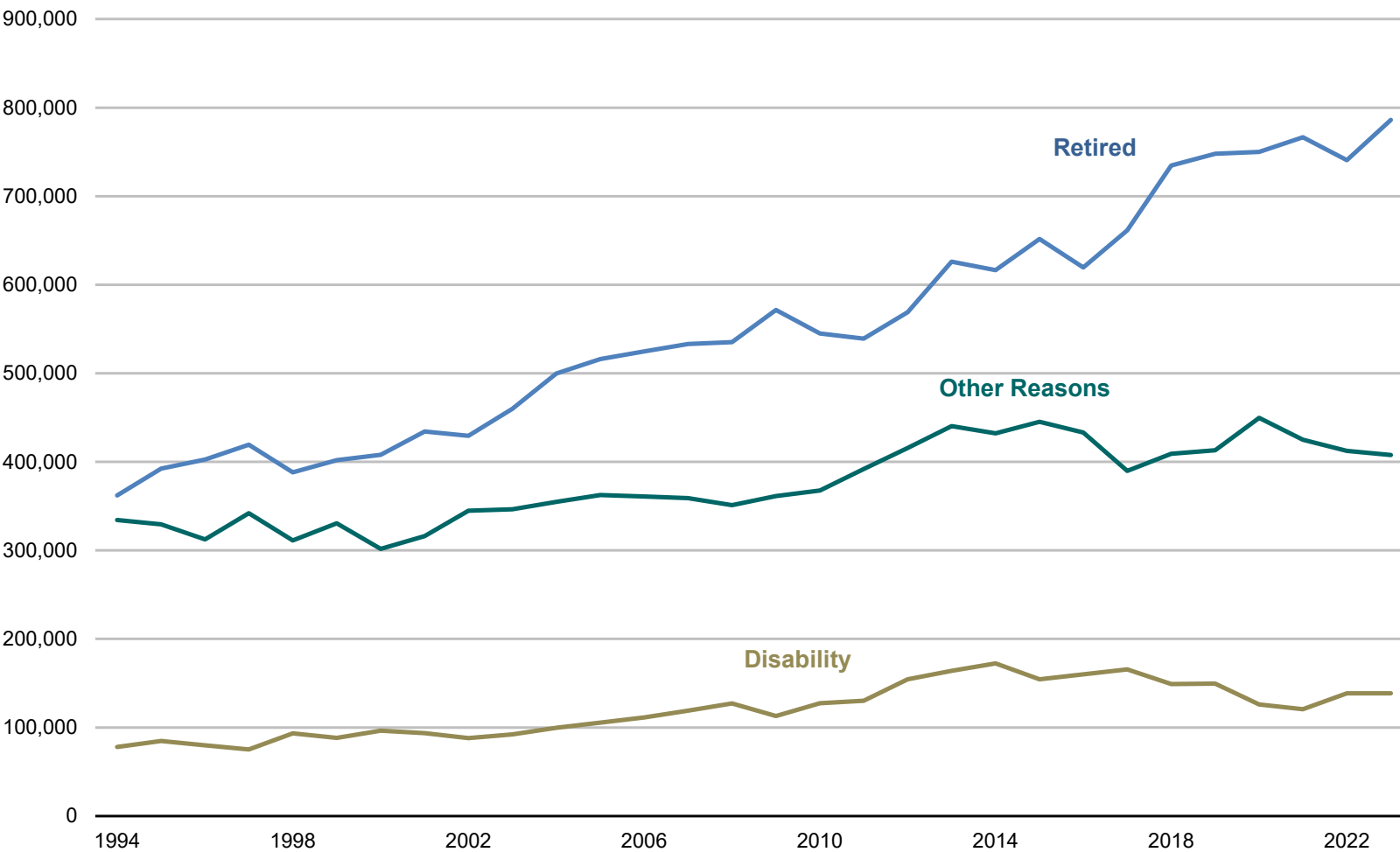
In 2023, Oregon added 2,200 people to the labor force.

That was a gain of 0.1%.

Source: Oregon Employment Department, Local Area Unemployment Statistics

SLOWING LABOR FORCE GROWTH: MORE RETIREMENTS

Reasons Oregonians Ages 16+ are Not in Labor Force
Annual Average, 1994-2023



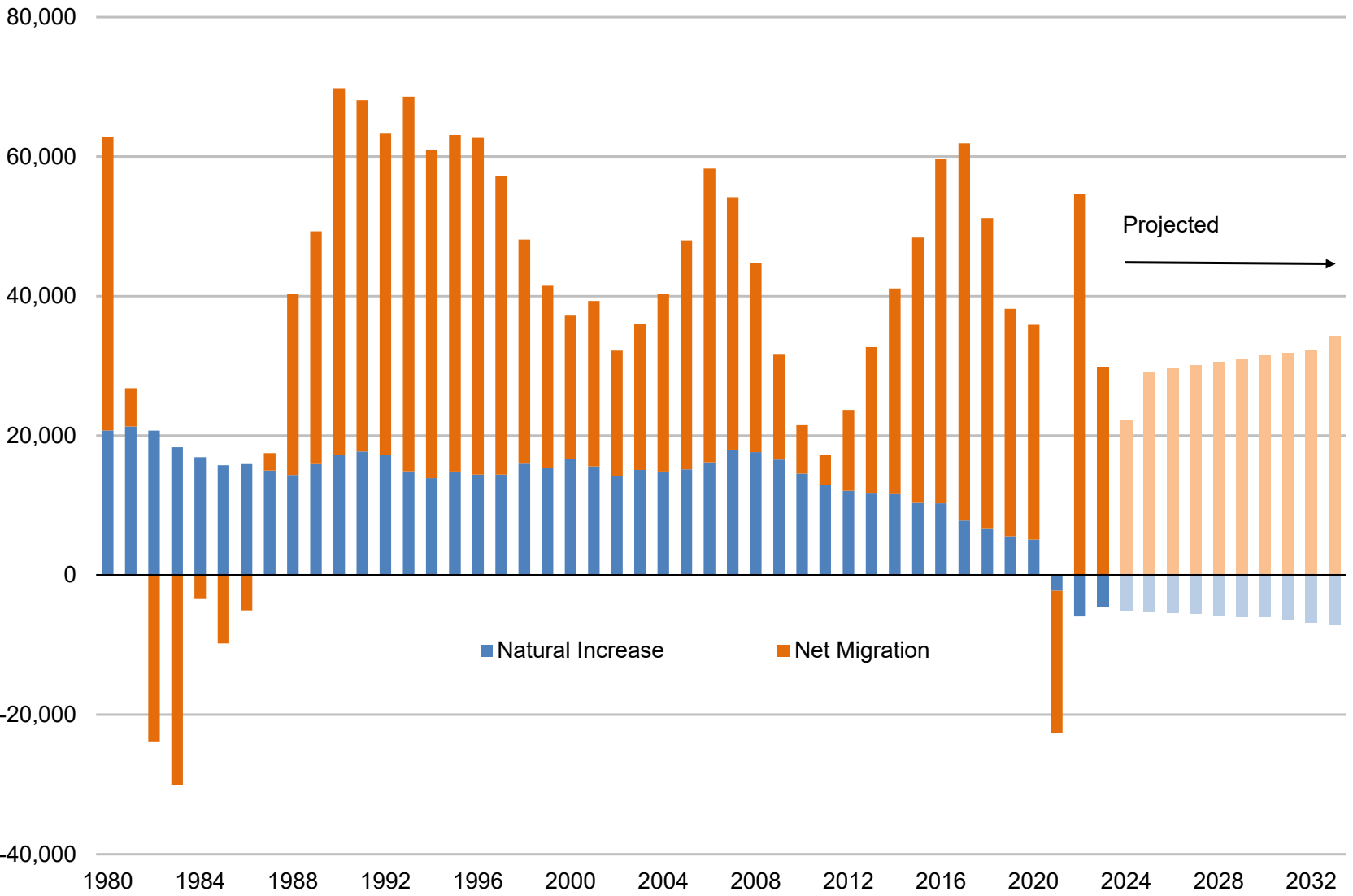
Not in Oregon's labor force due to retirement:

- Up 5% since 2019
- Rose by 26% over the past decade

Source: Oregon Employment Department, Local Area Unemployment Statistics

SLOWING LABOR FORCE GROWTH: SLOWER POPULATION GROWTH

Oregon's Population Components of Change

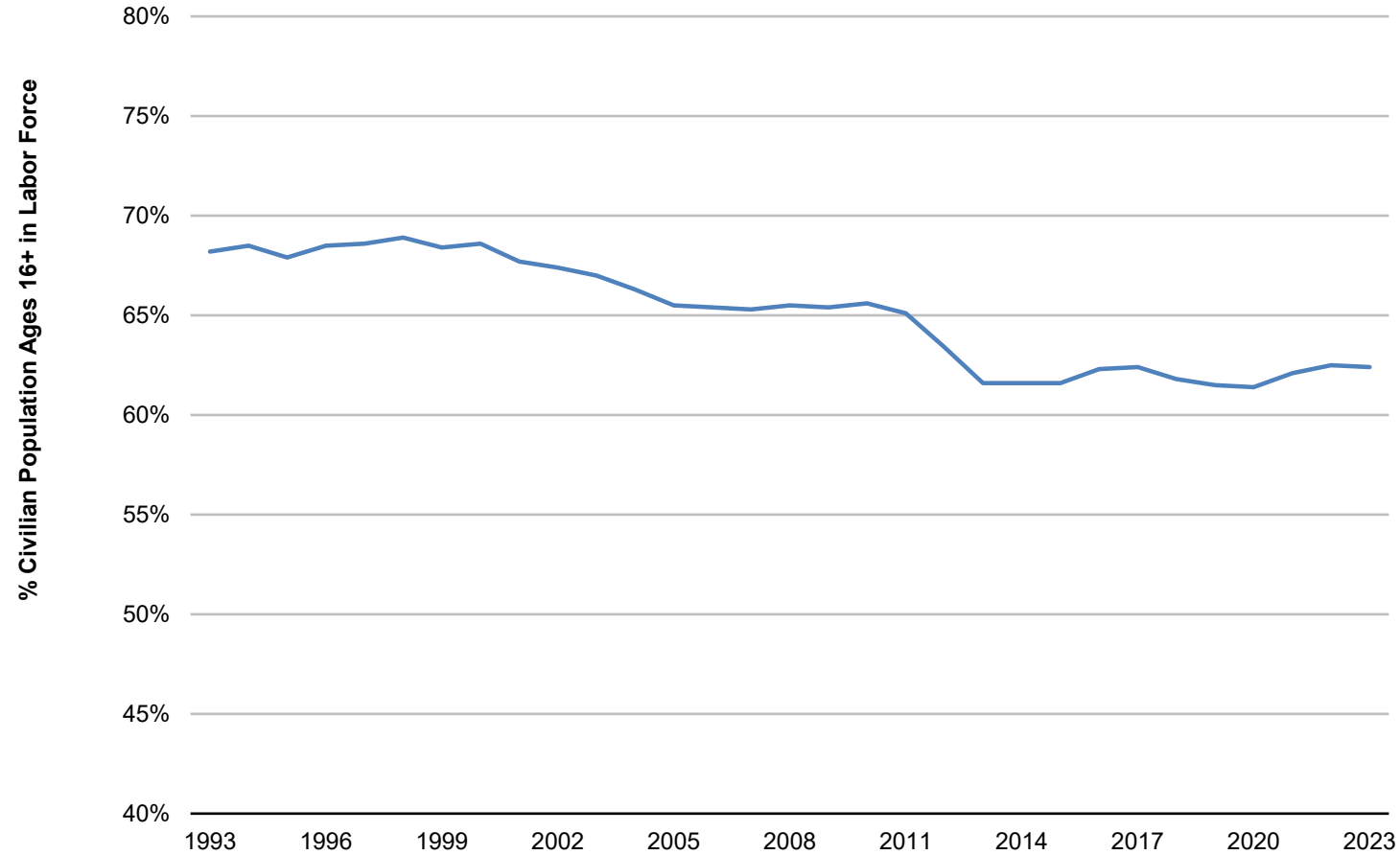


Portland State University estimates show a rebound in 2022, but population growth is projected to be slower in the coming years than historical norms.

Source: Oregon Employment Department, Oregon Office of Economic Analysis

LABOR FORCE PARTICIPATION RATES HOLDING

Oregon's Labor Force Participation Rate, 1993-2023

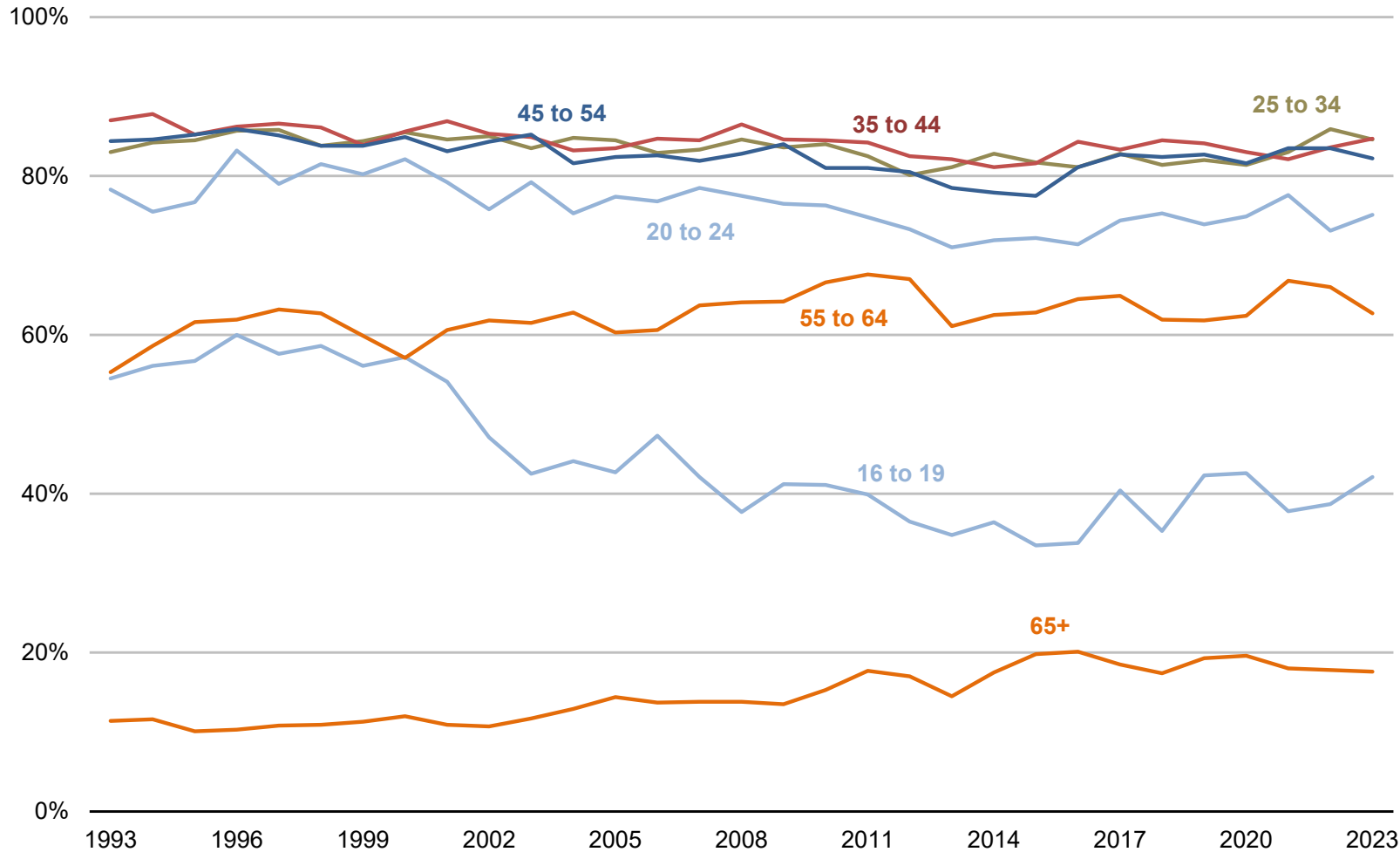


May be able to grow the labor force amid slower population and labor force growth by instead increasing participation rates within the existing population.

Source: Oregon Employment Department, Local Area Unemployment Statistics

LABOR FORCE PARTICIPATION RATES VARY WIDELY BY AGE CATEGORY

Oregon Labor Force Participation Rates by Age Category, 1993 - 2023



Participation rate rebounding slightly for teens, but well below historic highs.

The rate doubled for those 65 years and older over the past decade.

Source: Oregon Employment Department, Local Area Unemployment Statistics

UNEMPLOYMENT REMAINS LOW BY HISTORICAL STANDARDS

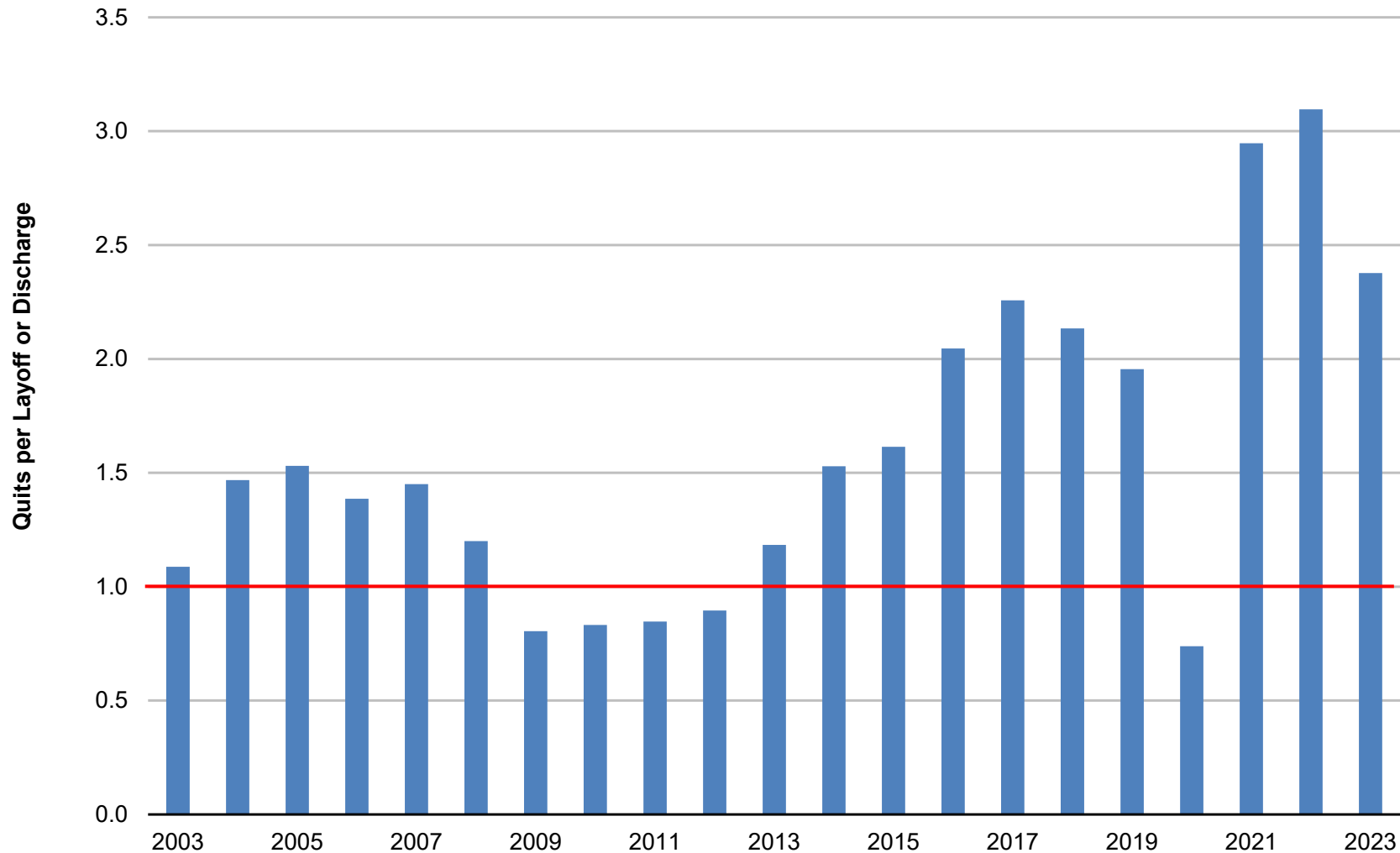
Oregon Job Vacancies and Unemployment Rates, 2019-2023

	2019	2020	2021	2022	2023
Vacancies	57,241	44,408	96,887	103,977	72,815
Average Hourly Wage (in 2023\$)	\$22.42	\$21.25	\$22.14	\$22.55	\$25.13
Full-time Positions	77%	79%	78%	81%	82%
Permanent Positions	93%	92%	93%	94%	94%
Requiring Education Beyond High School	34%	33%	30%	29%	39%
Requiring Previous Experience	57%	53%	53%	52%	58%
Difficult to Fill	57%	51%	72%	72%	61%
Unemployment Rate	3.8%	7.8%	5.2%	4.2%	3.7%

Employers still have a relatively large number of job openings.

Sources: Oregon Employment Department; Job Vacancy Survey, Local Area Unemployment Statistics

Labor Leverage Ratio in Oregon, 2003-2023



Slow labor force growth, many job openings, and low unemployment give workers the upper hand in the labor market.

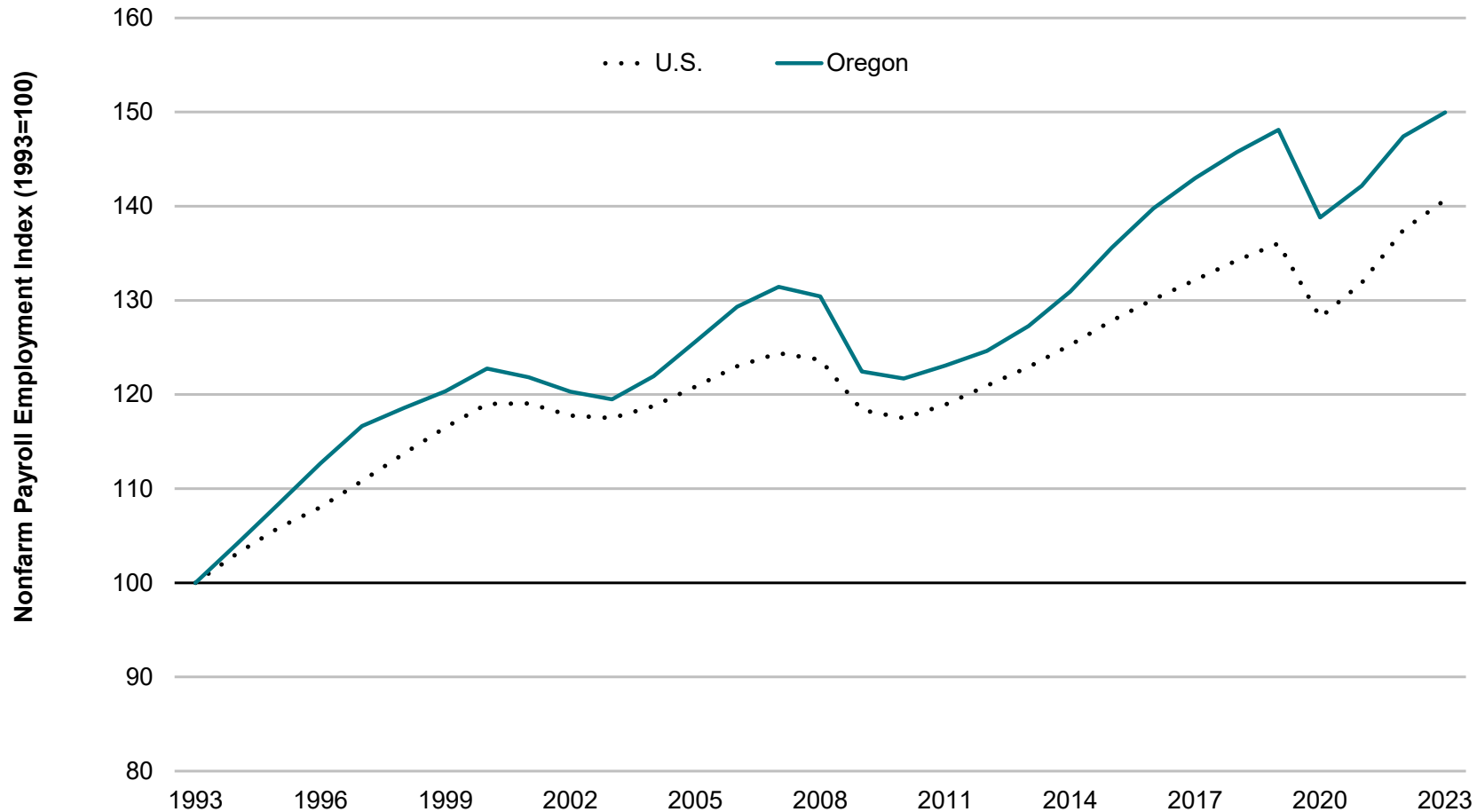
Workers have quit jobs at 2-3 times the rate of employer-initiated layoffs or discharges in recent years.

Layoffs / discharges hit their lowest level in 20 years in Oregon during 2023.

Source: Oregon Employment Department and U.S. Bureau of Labor Statistics; Upjohn Institute, Soujourner

AGING WORKFORCE AND SLOWER LABOR FORCE GROWTH COULD IMPACT JOB GROWTH

Employment Levels Relative to 1993 U.S. and Oregon

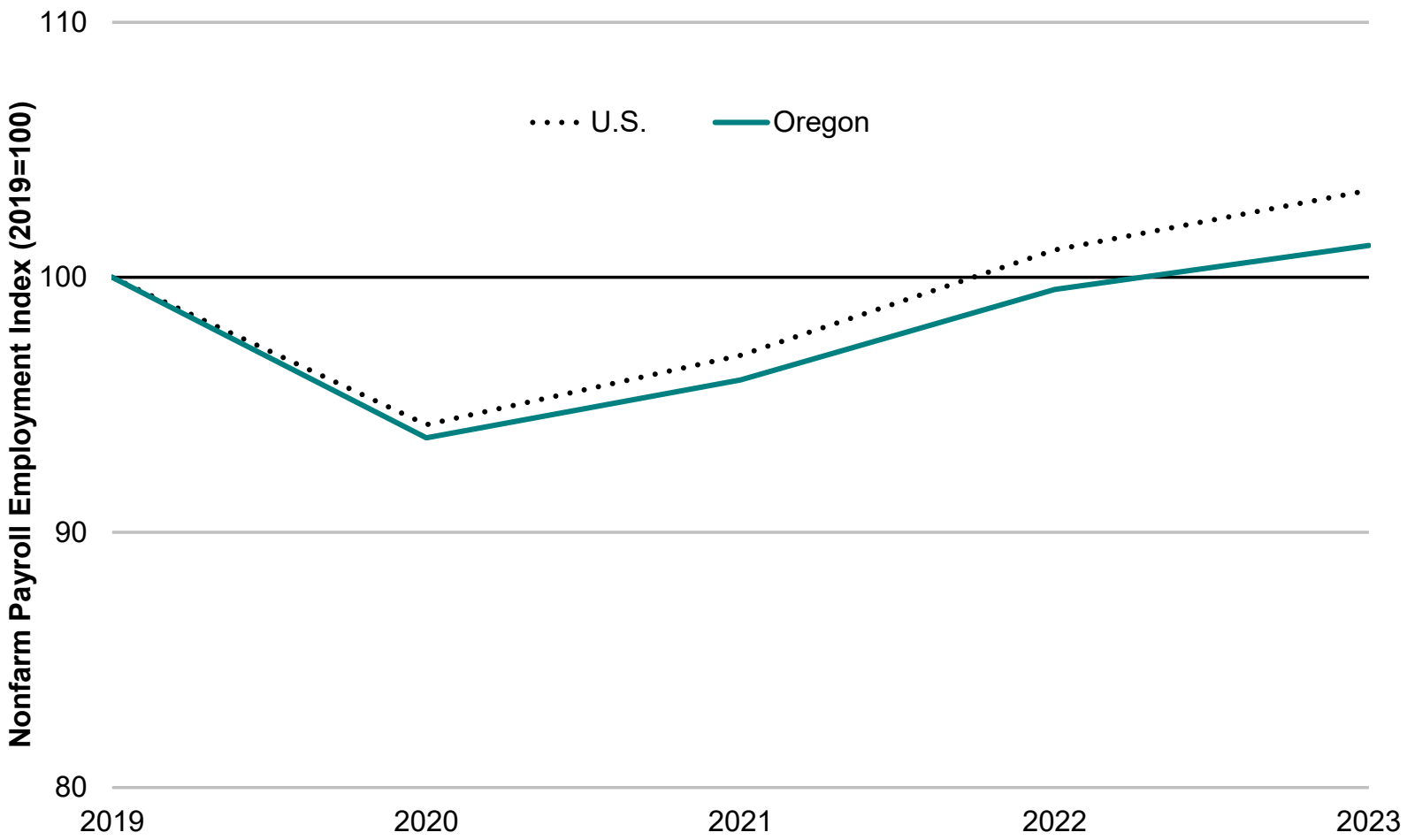


Between 1993 and 2023, Oregon's total nonfarm employment grew by 50%, compared with 41% for the U.S.

Sources: Oregon Employment Department and U.S. Bureau of Labor Statistics

AGING WORKFORCE AND SLOWER LABOR FORCE GROWTH COULD IMPACT JOB GROWTH

Employment Levels Relative to 2019 U.S. and Oregon



Oregon has lagged the U.S. in jobs recovery and expansion since 2020.

Sources: Oregon Employment Department and U.S. Bureau of Labor Statistics

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