

East Cascades Workforce Update

4th Quarter, 2025

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AGENDA

- Macroeconomic Outlook
- Regional Employment Change
- Workforce Demand
- Workforce Supply
- Projected Growth

ECONOMIC ACTIVITY (OREGON AND REGION)

- Economic activity in the Twelfth District (Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah, and Washington) edged down slightly during the July to mid-August reporting period.
- Employment levels were down slightly as employers laid off workers and did not fill vacated positions.
- Wages grew somewhat, and prices rose modestly overall.
- Conditions in retail trade and the consumer and business services sector weakened slightly.
- Manufacturing activity declined modestly, and conditions in agriculture and resource-related sectors were somewhat weaker.
- In both residential and commercial real estate, activity was slow but unchanged.
- Financial sector conditions were stable.
- Community support organizations struggled to balance the continued demand for services against declines in funding.
- Looking ahead, contacts' economic outlook weakened some relative to the prior reporting period.

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).

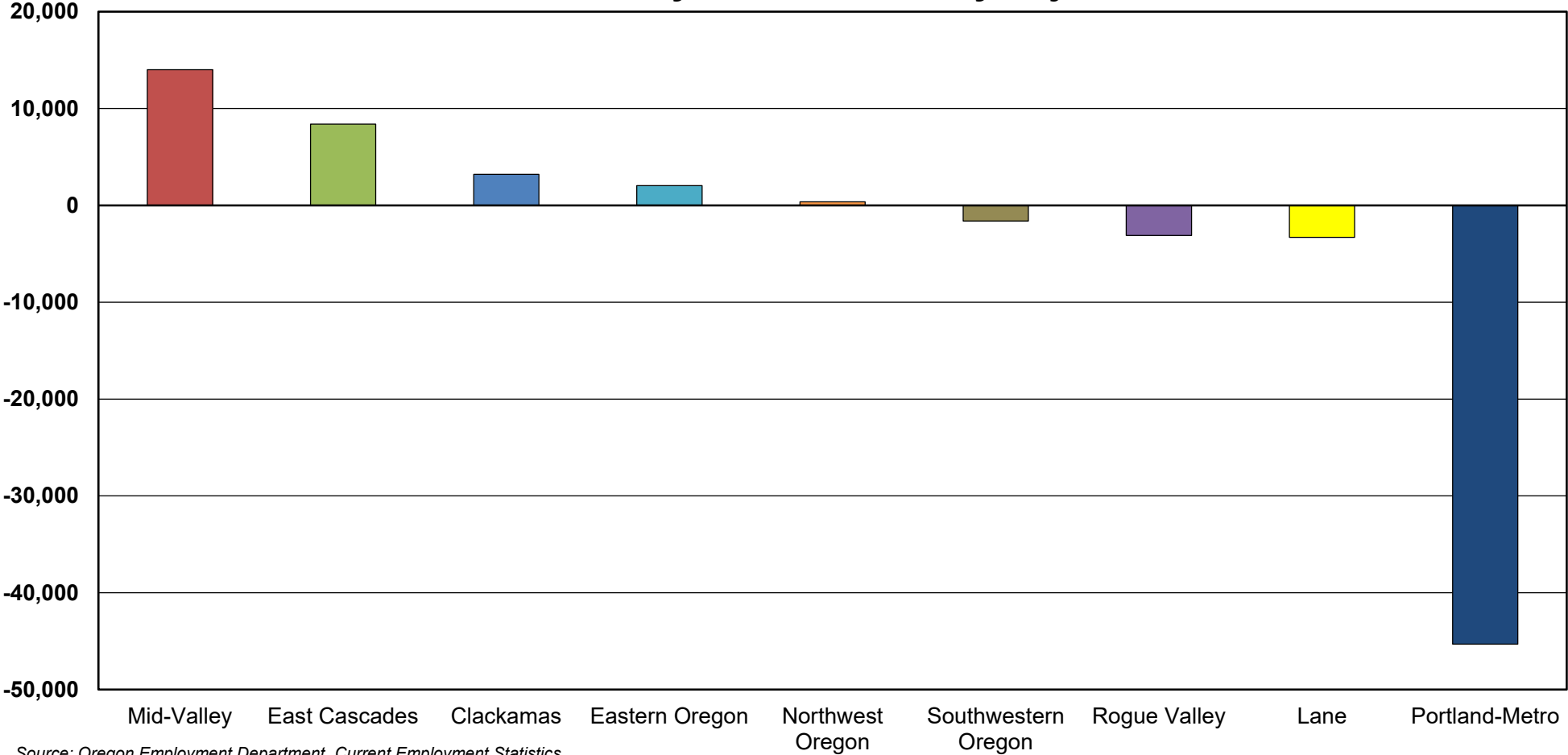
Employers dropped 18,300 nonfarm payroll jobs over the past year, a loss of 0.9%.

- 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%).

REGIONAL EMPLOYMENT CHANGE

FIVE OF NINE WORKFORCE AREAS HAVE MORE JOBS THAN IN FEBRUARY 2020.

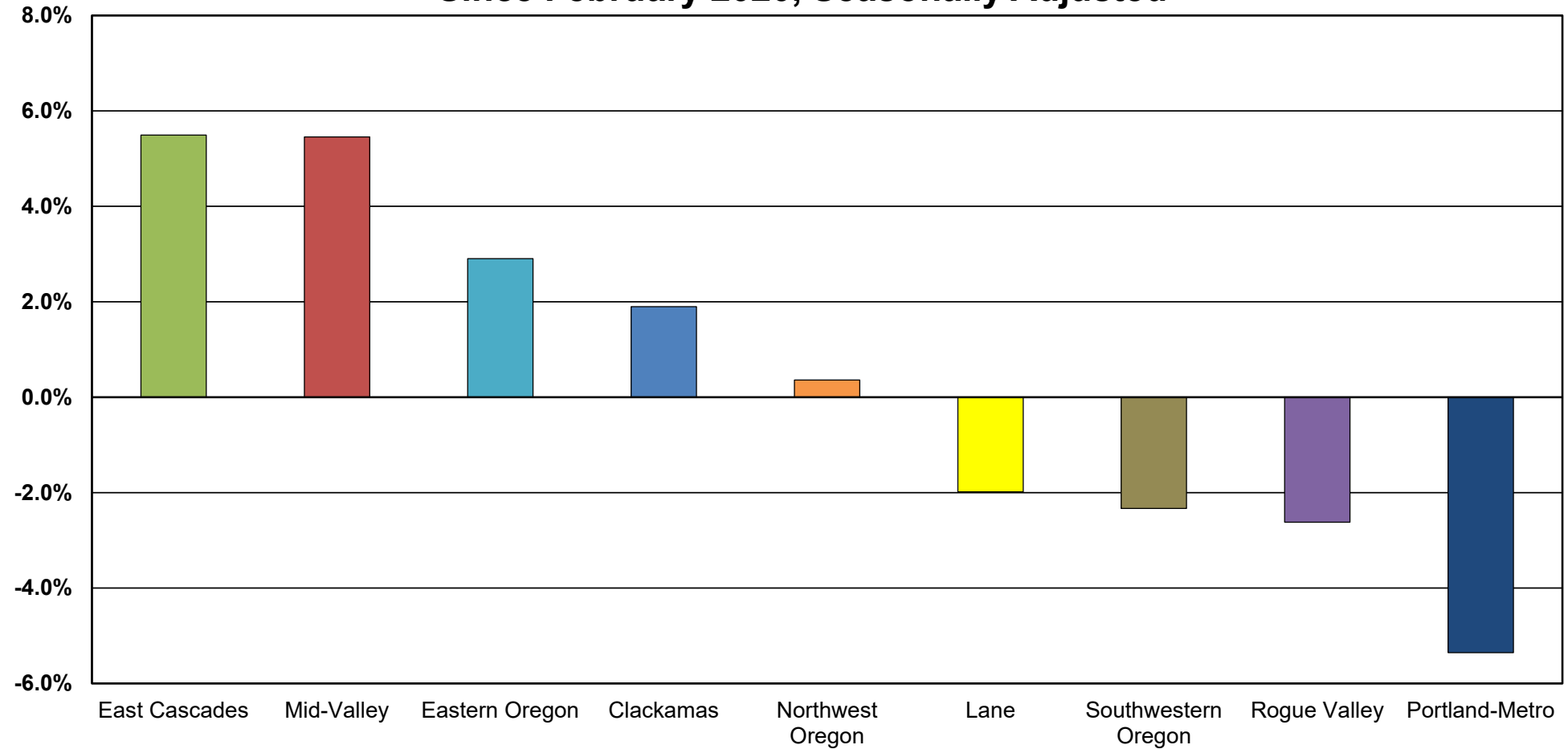
Job Change by Local Workforce Area as of August 2025
Since February 2020, Seasonally Adjusted



Source: Oregon Employment Department, Current Employment Statistics

FIVE OF NINE WORKFORCE AREAS HAVE MORE JOBS NOW THAN IN FEBRUARY 2020.

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

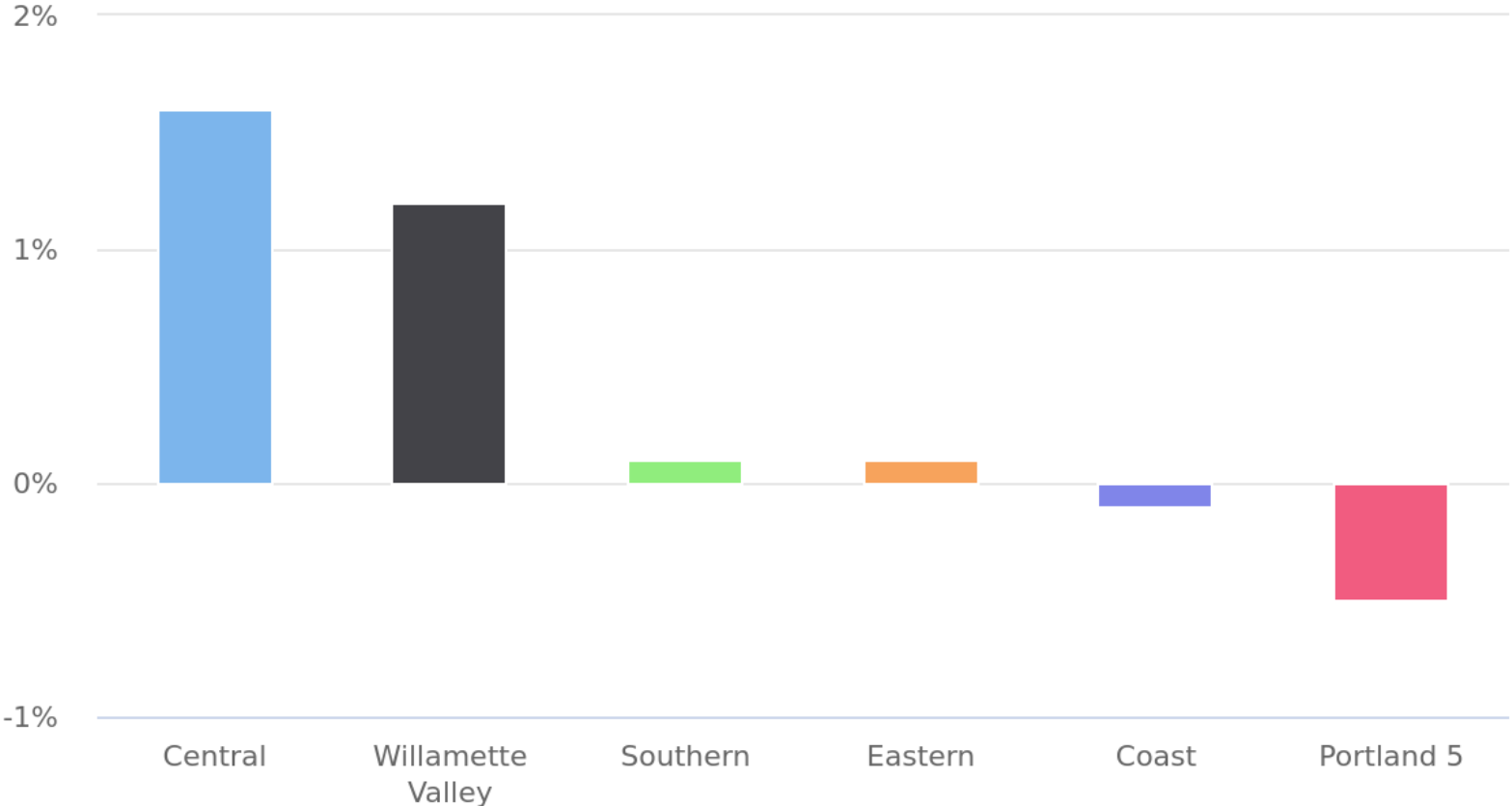


Source: Oregon Employment Department, Current Employment Statistics

CENTRAL OREGON GREW AT THE FASTEST RATE OF ANY BROAD REGION OVER THE YEAR

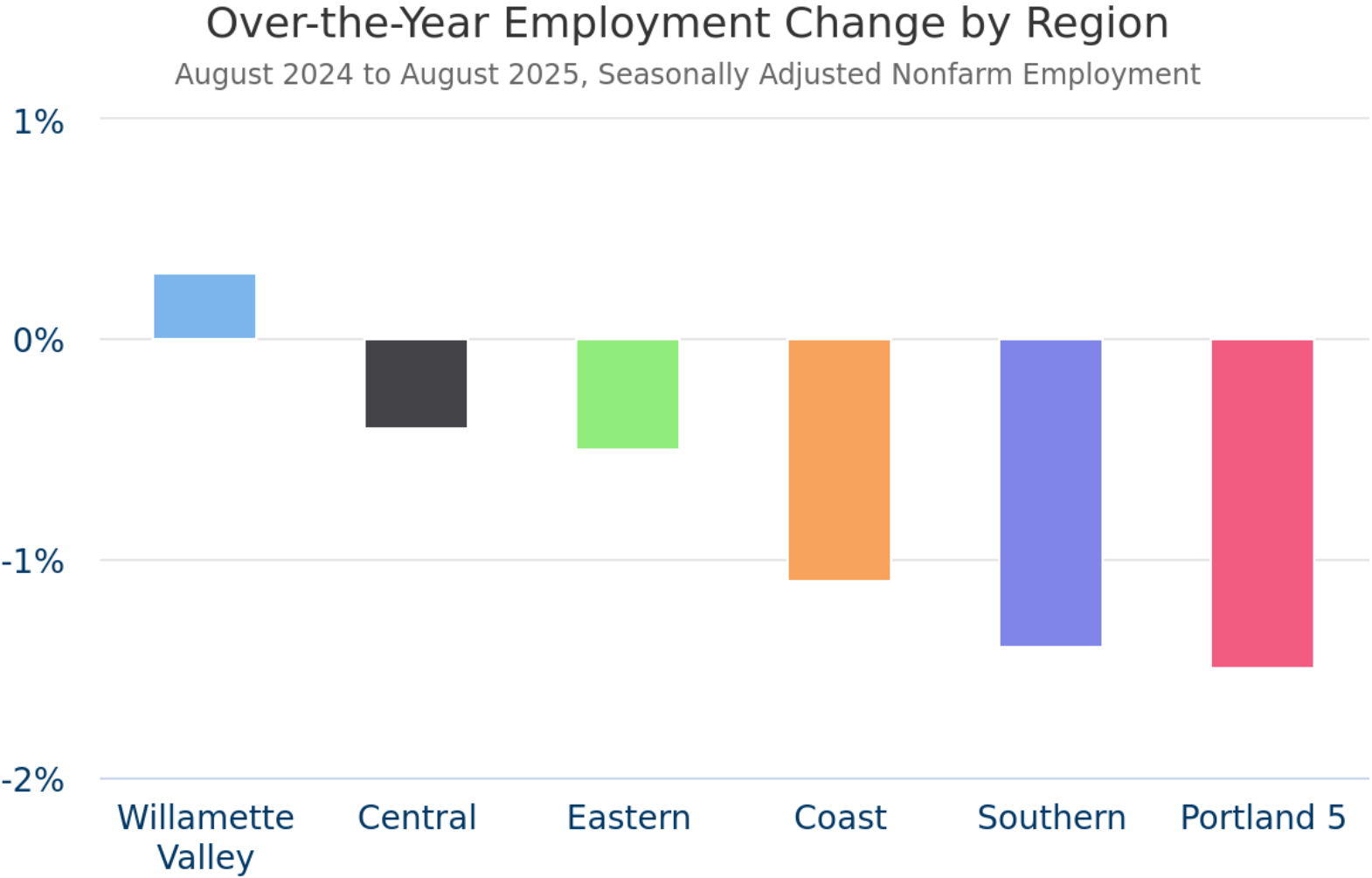
Over-the-Year Employment Change by Region

April 2024 to April 2025, Seasonally Adjusted Nonfarm Employment



Oregon Employment Department, Current Employment Statistics

THE WILLAMETTE VALLEY WAS THE ONLY BROAD REGION TO EXPERIENCE EMPLOYMENT GAINS OVER THE YEAR.



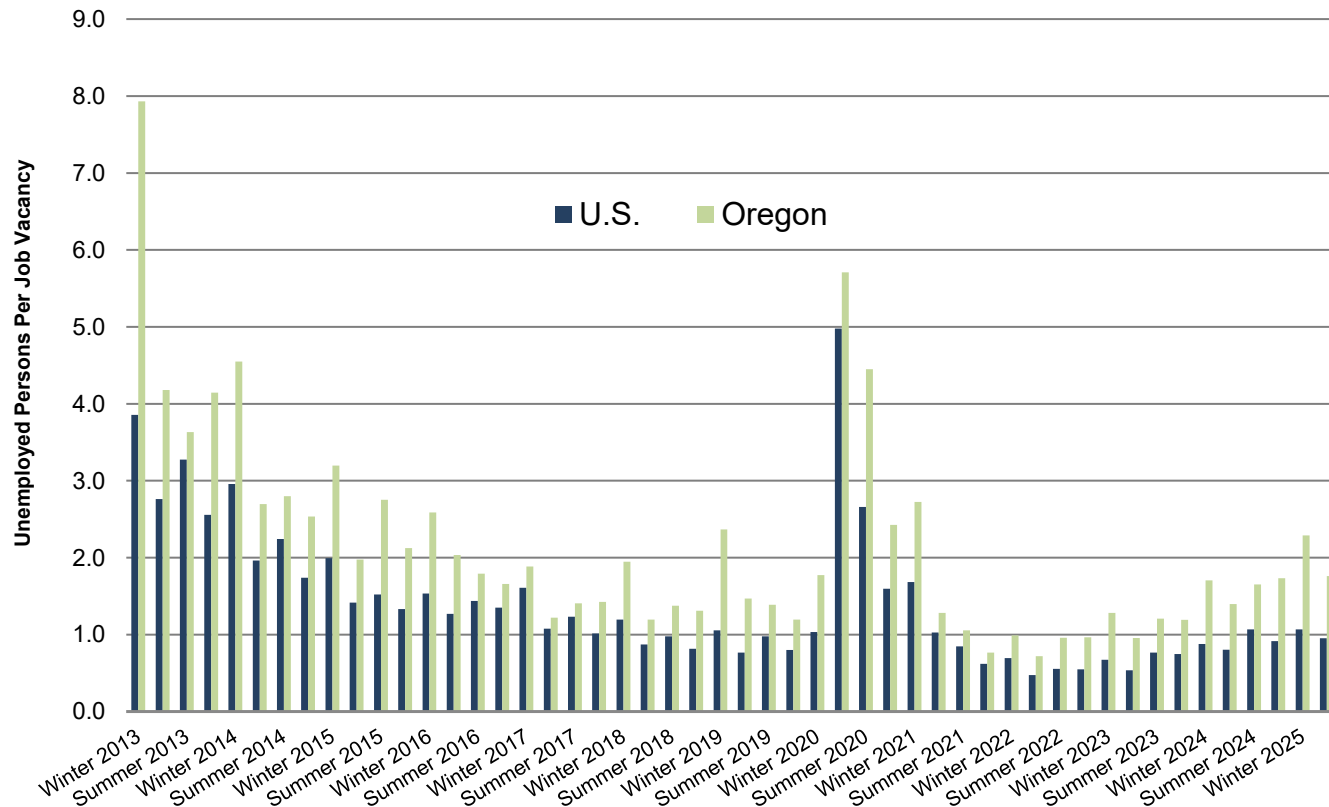
Oregon Employment Department, Current Employment Statistics

WORKFORCE DEMAND

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)



Source: Oregon Employment Department

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.

OREGON BUSINESSES REPORTED 51,000 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.

VACANCIES DECREASED OVER THE YEAR IN EIGHT OF THE NINE REGIONS

Oregon Job Vacancies by Geography, Winter 2025

Geography	Vacancies
Oregon Statewide	51,295
Portland Metro	16,706
Mid-Valley	7,064
East Cascades	6,027
Lane	4,762
Rogue Valley	4,558
Clackamas	3,843
Northwest Oregon	2,885
Southwestern Oregon	2,421
Eastern Oregon	1,940

Multi-area or unknown regions excluded

Source: Oregon Employment Department

Winter vacancies were distributed across the state, with the Portland tri-county area accounting for about 40%.

Vacancies decreased over the year in every region in the state, except for Southwestern Oregon.

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

Multi-area or unknown regions excluded

Source: Oregon Employment Department

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

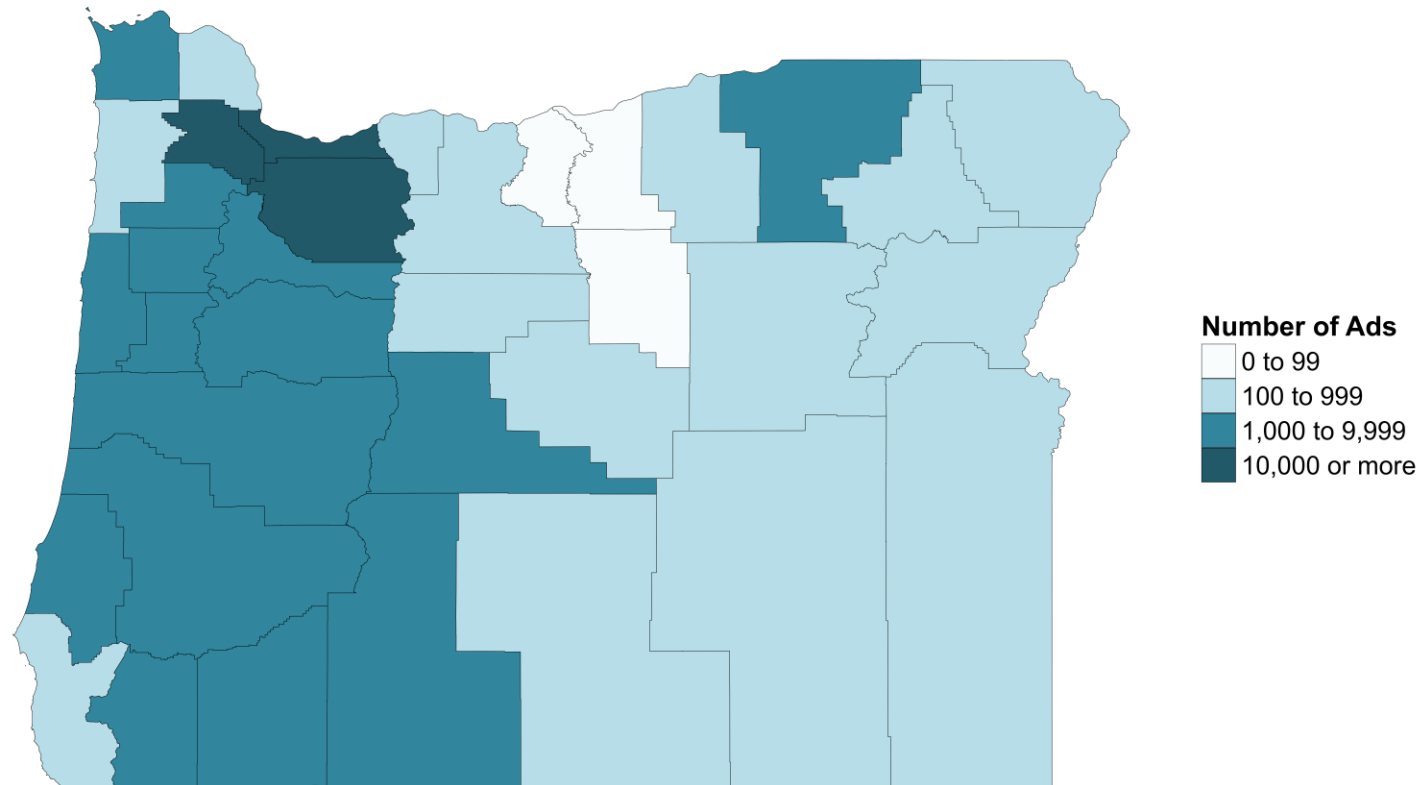
Help Wanted Online Ads by County

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)

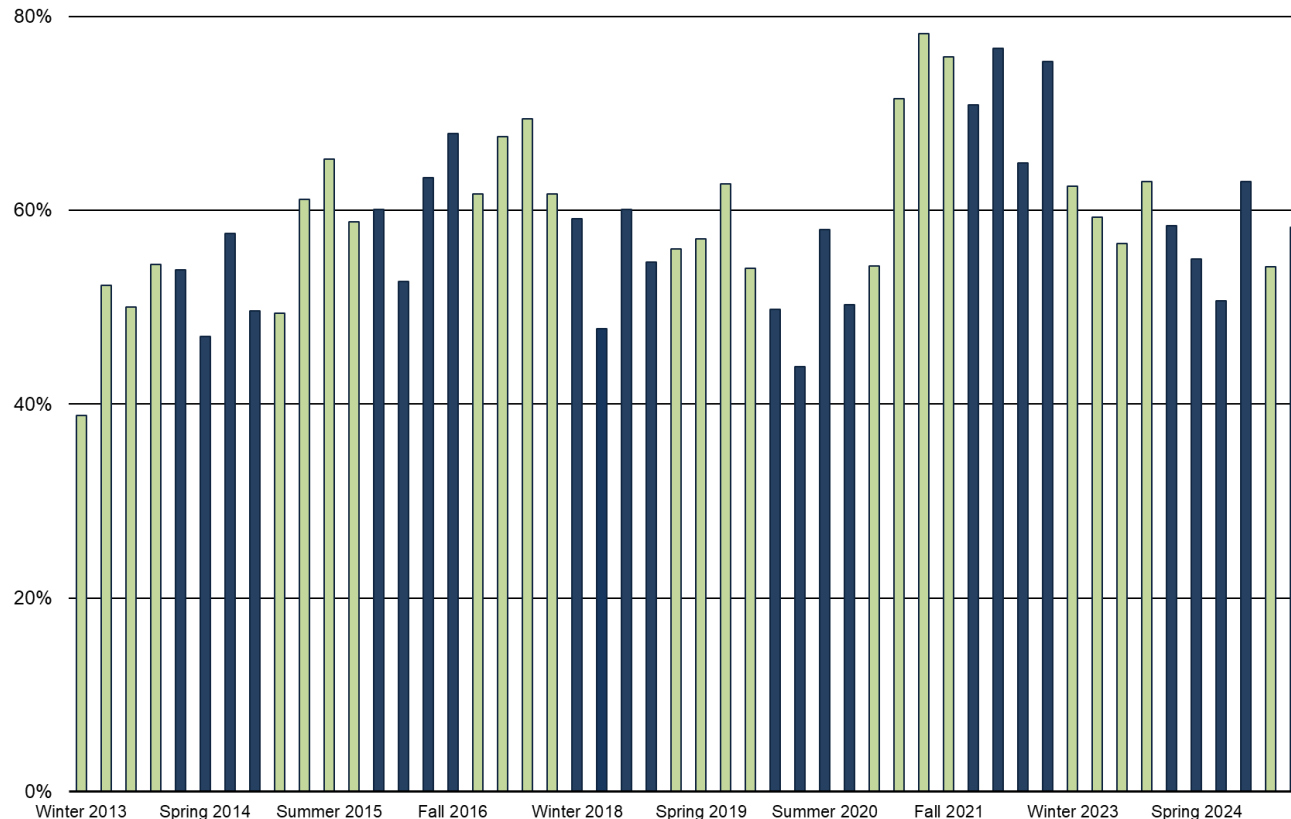
Help Wanted Online Ads, August 2025
Not Seasonally Adjusted



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

58% OF SPRING JOB VACANCIES WERE REPORTED AS DIFFICULT TO FILL.

**Businesses Report Difficulty Filling
58% of Vacancies in Spring 2025**



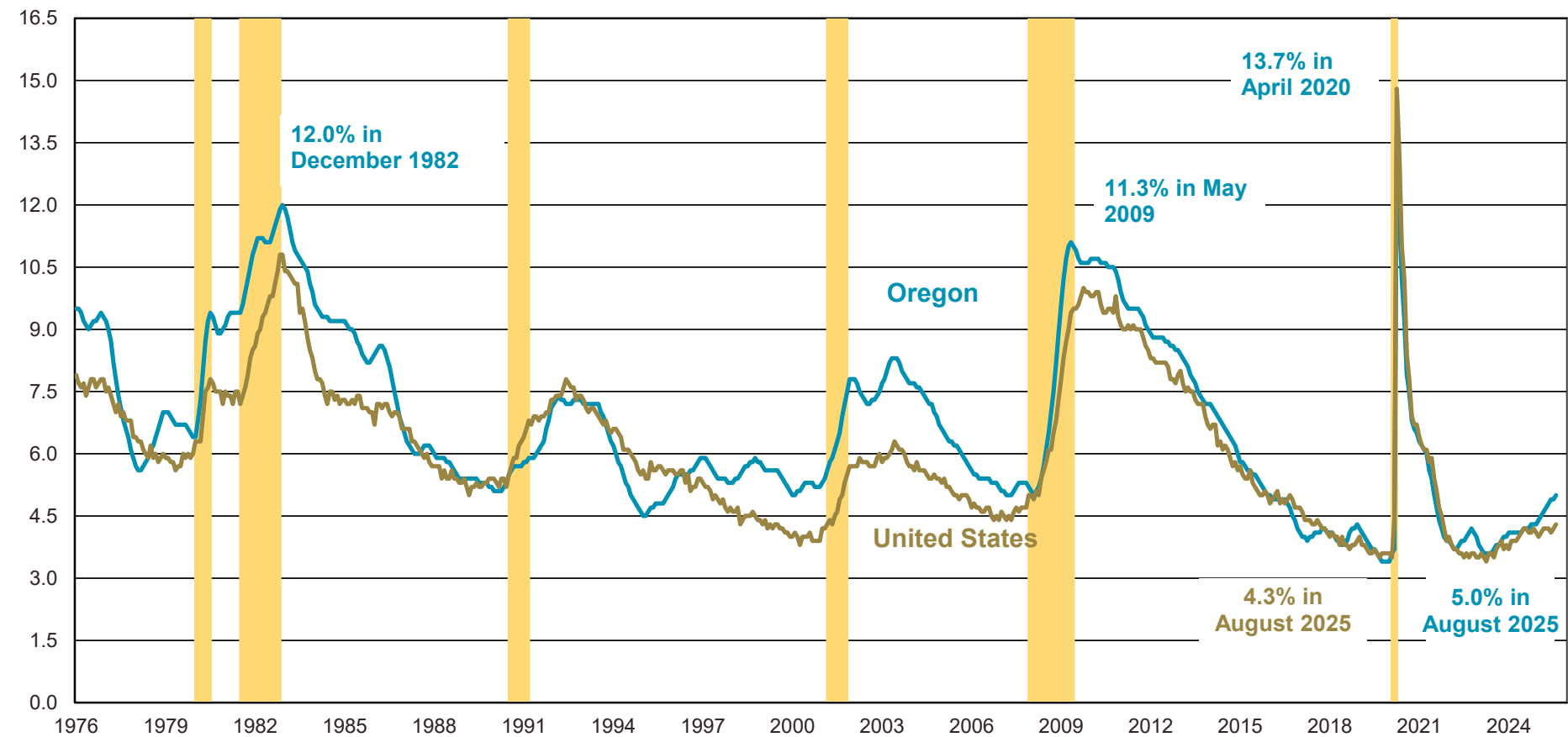
The occupations with the highest number of difficult-to-fill vacancies:

- Automotive and service technicians
- Truck drivers
- Maintenance and repair workers
- Project management specialists

WORKFORCE SUPPLY

OREGON'S UNEMPLOYMENT RATE WAS 5.0% IN AUGUST.

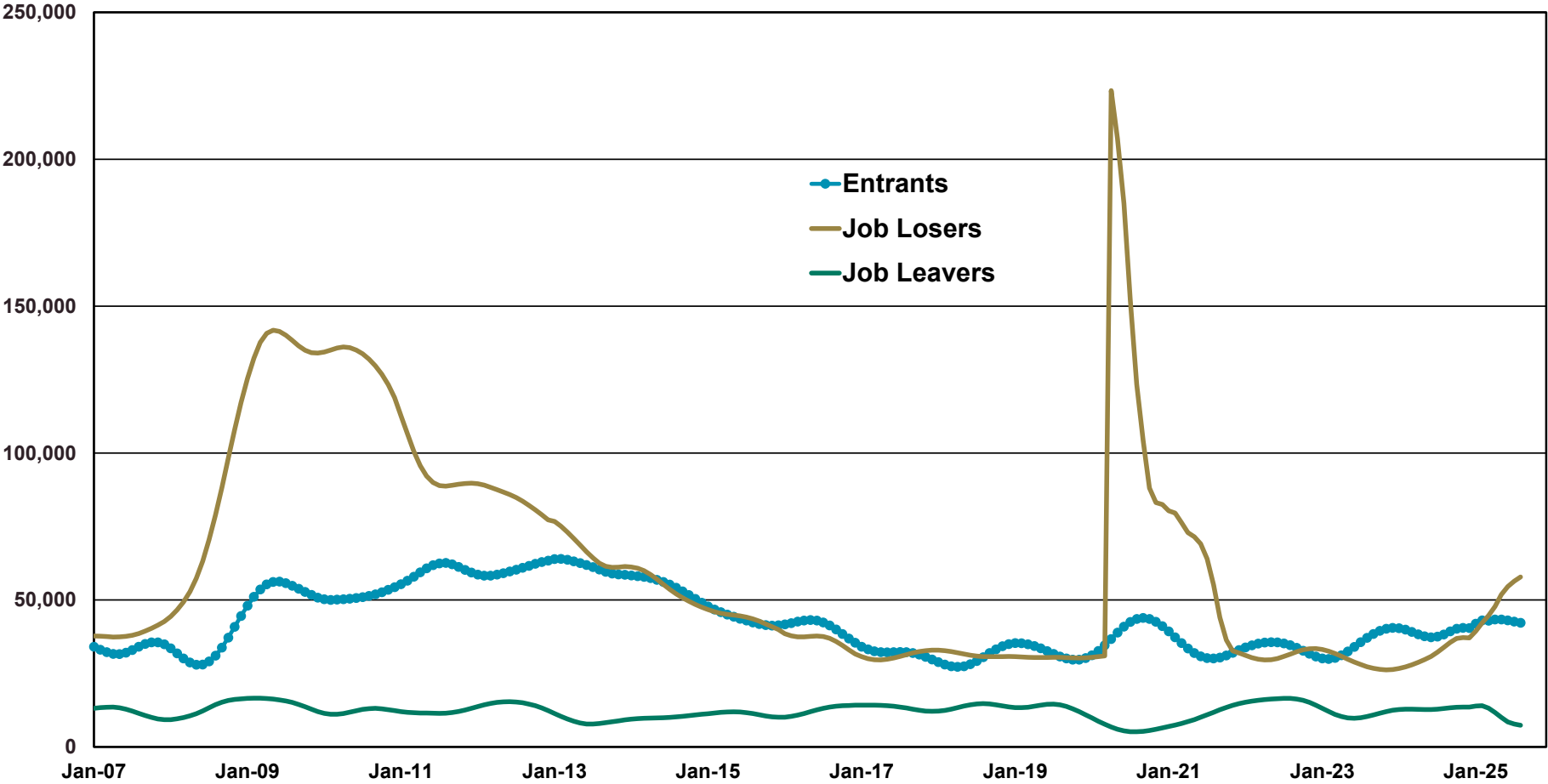
Oregon's Unemployment Rate Was 5.0% in August 2025
Unemployed % of Labor Force (Bars Represent Recessions)



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

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



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

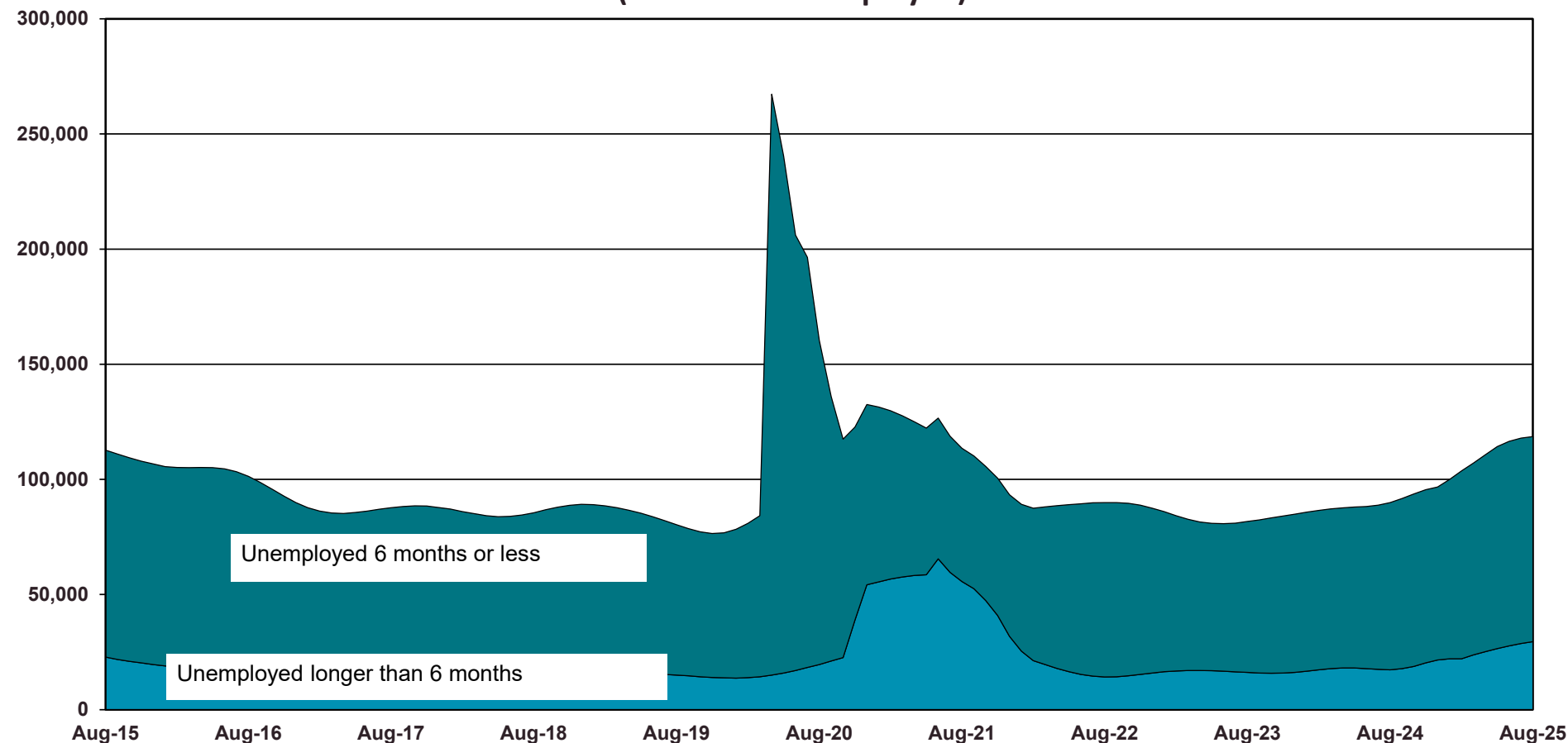
Lost job
57,800 (54%)

Left job voluntarily
7,400 (7%)

Source: Oregon Employment Department, Current Population Survey

ONE OUT OF FOUR UNEMPLOYED OREGONIANS HAVE BEEN OUT OF WORK FOR AT LEAST SIX MONTHS.

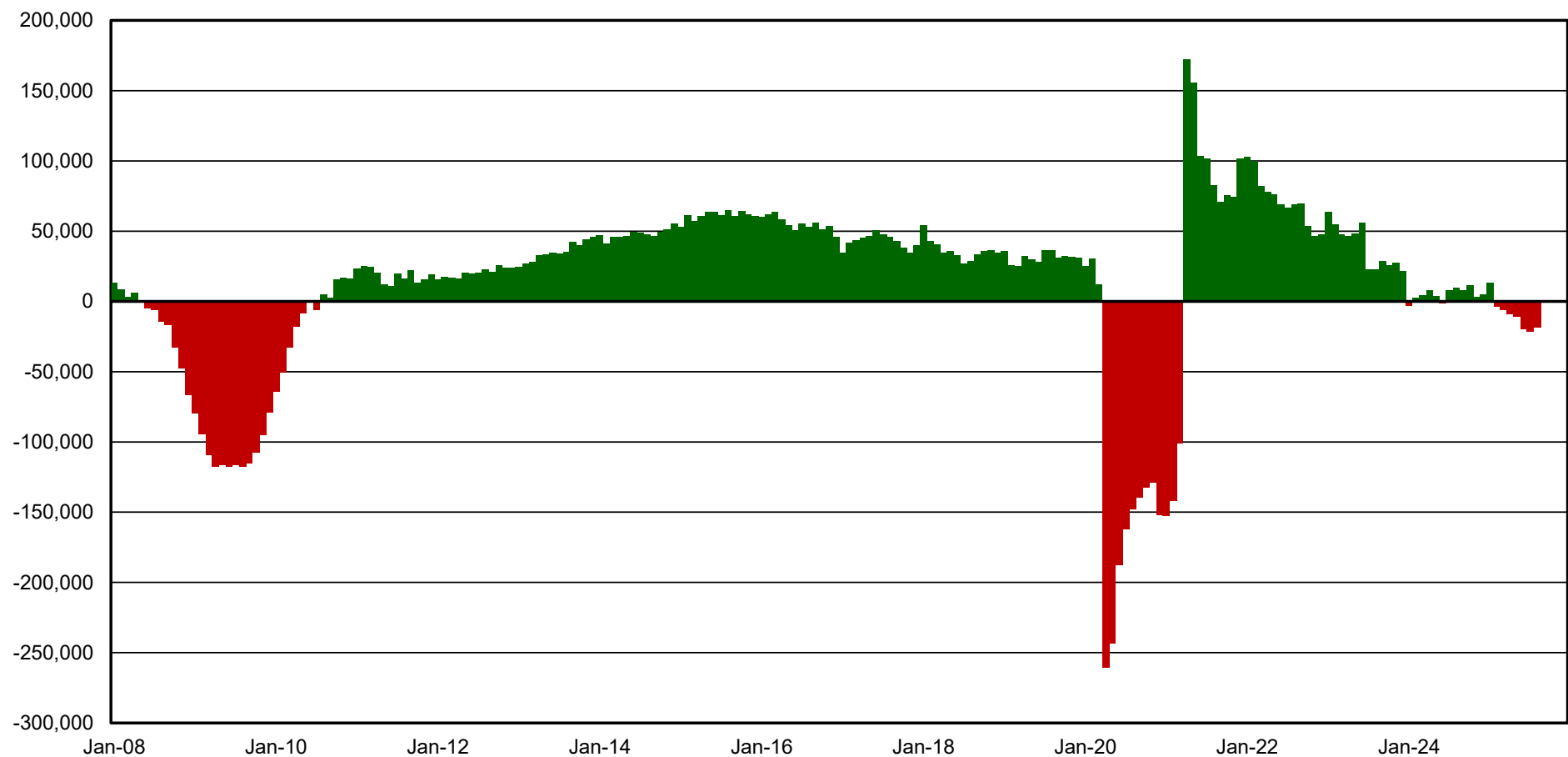
There are 32,500 Long-Term Unemployed Oregonians
(27% of All Unemployed)



Source: Oregon Employment Department, Local Area Unemployment Statistics

EMPLOYMENT DROPPED BY 18,300 JOBS FROM AUGUST 2024 TO AUGUST 2025.

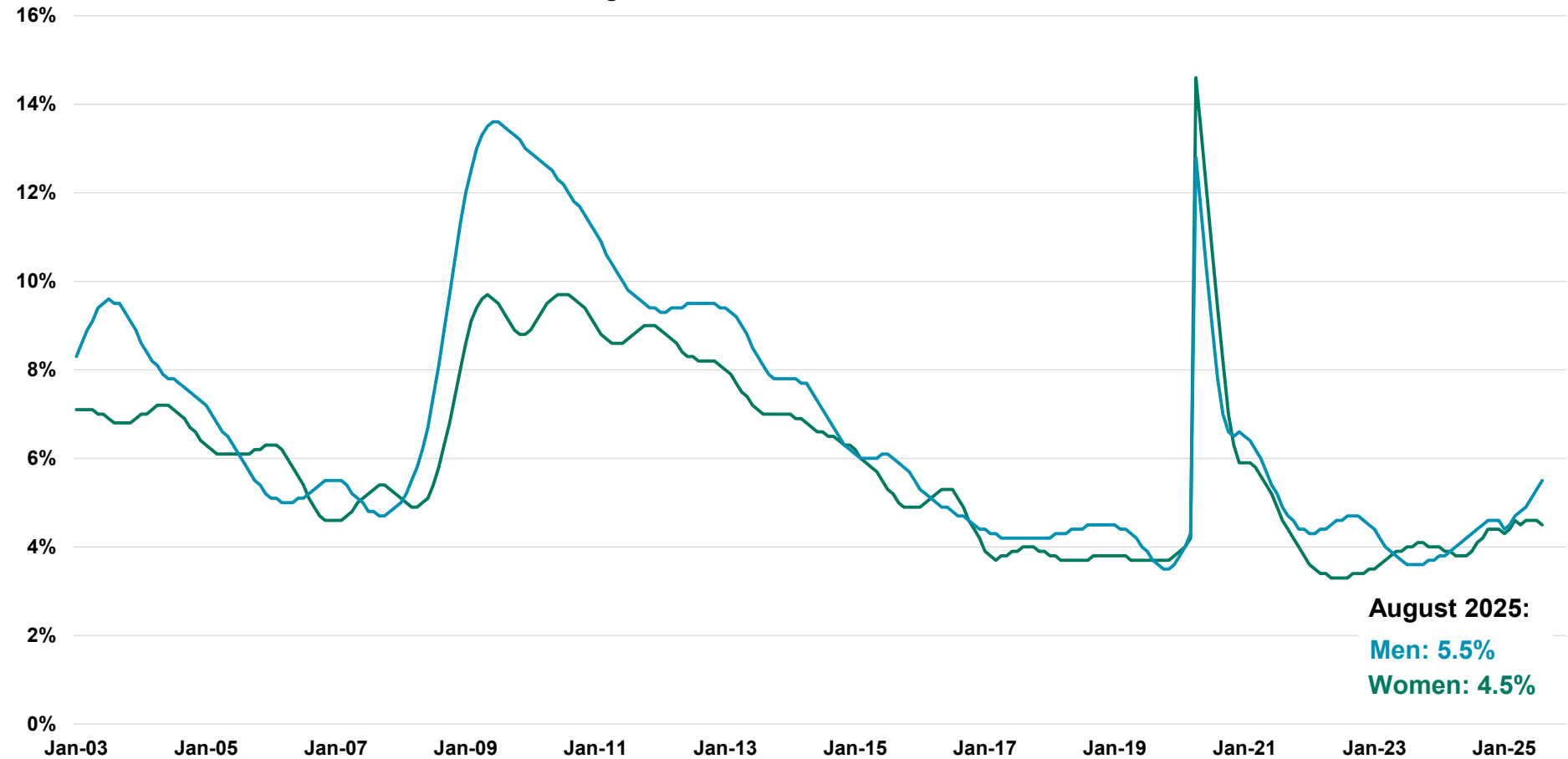
Oregon's Year-Over-Year Job Growth/Decline
Seasonally Adjusted



Source: Oregon Employment Department, Current Employment Statistics

THE UNEMPLOYMENT RATE IS HIGHER FOR MEN THAN WOMEN IN OREGON.

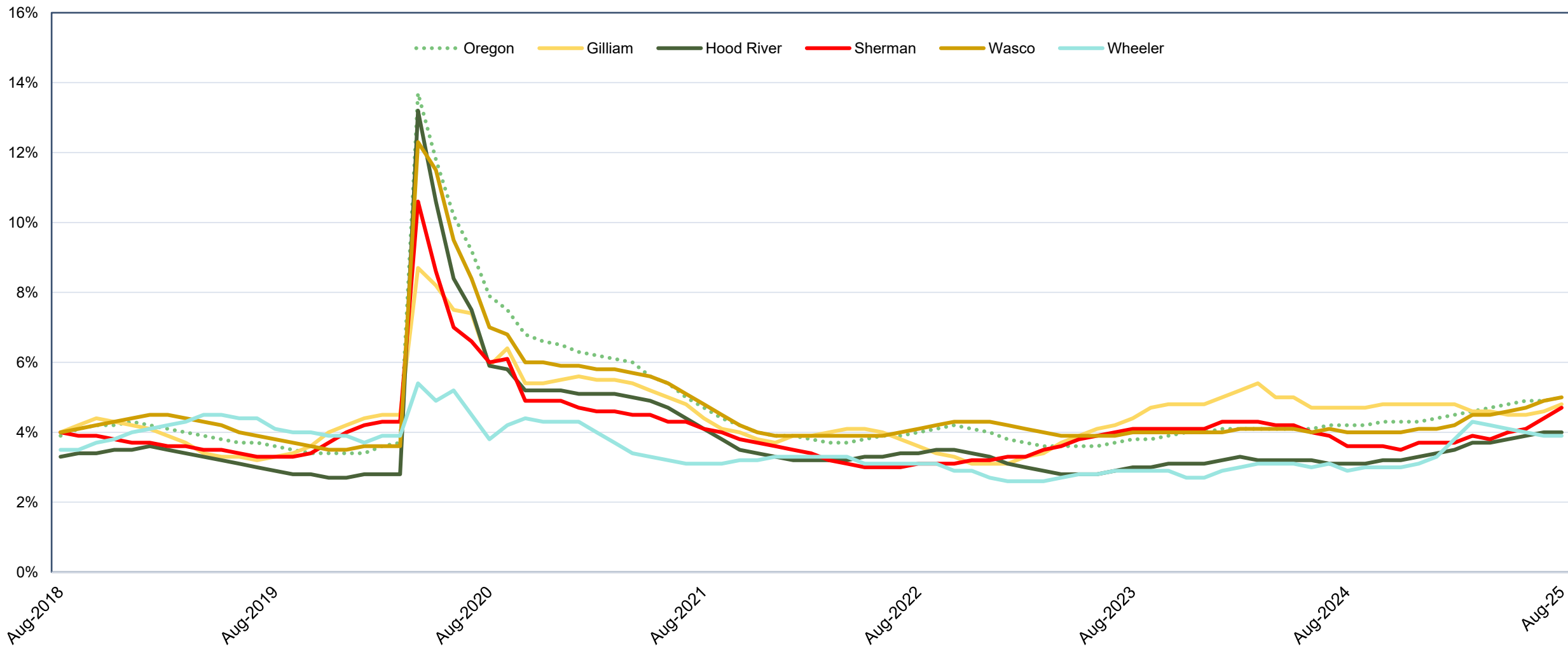
Monthly Unemployment Rates by Gender
Oregon, 2003 - Present



Source: Oregon Employment Department, Current Population Survey

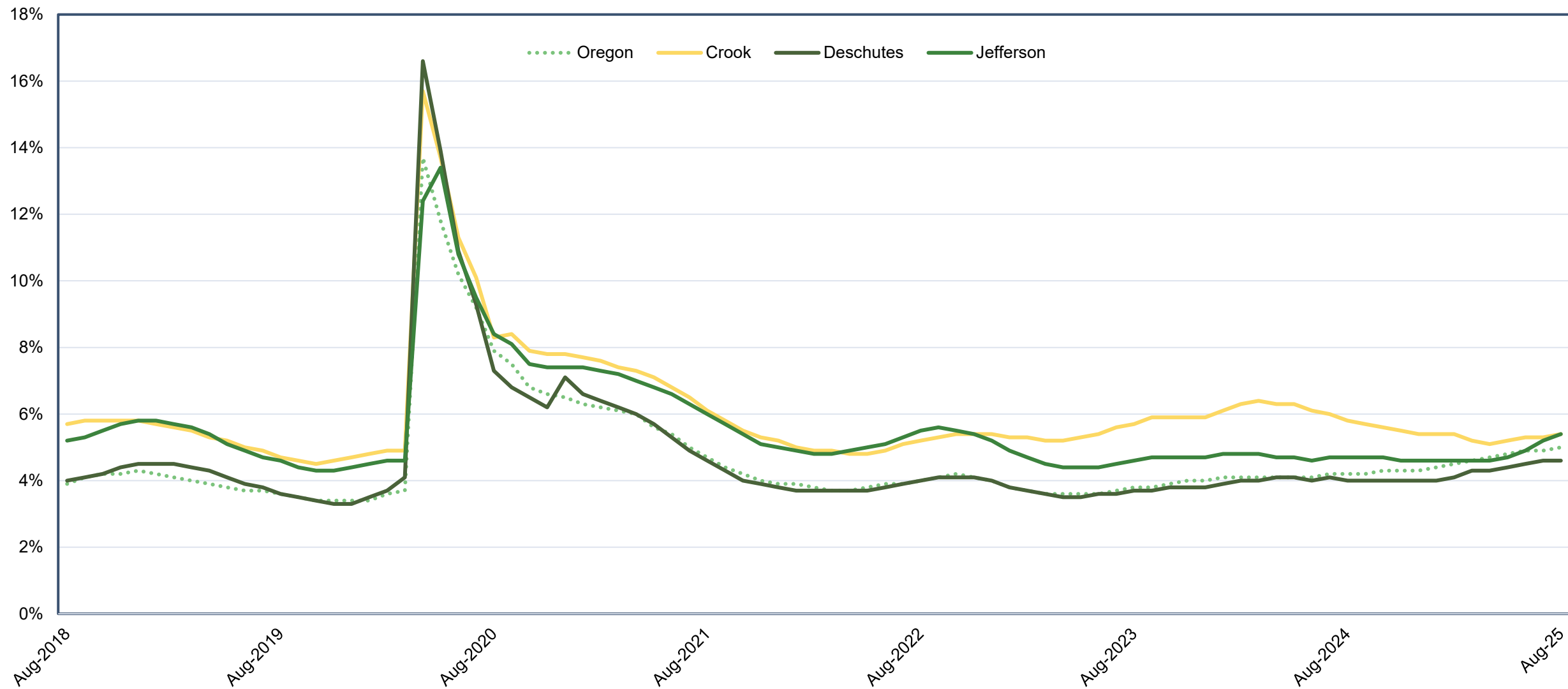
UNEMPLOYMENT IN THE COLUMBIA GORGE

Columbia Gorge Unemployment Rates
August 2018-2025



UNEMPLOYMENT IN CENTRAL OREGON

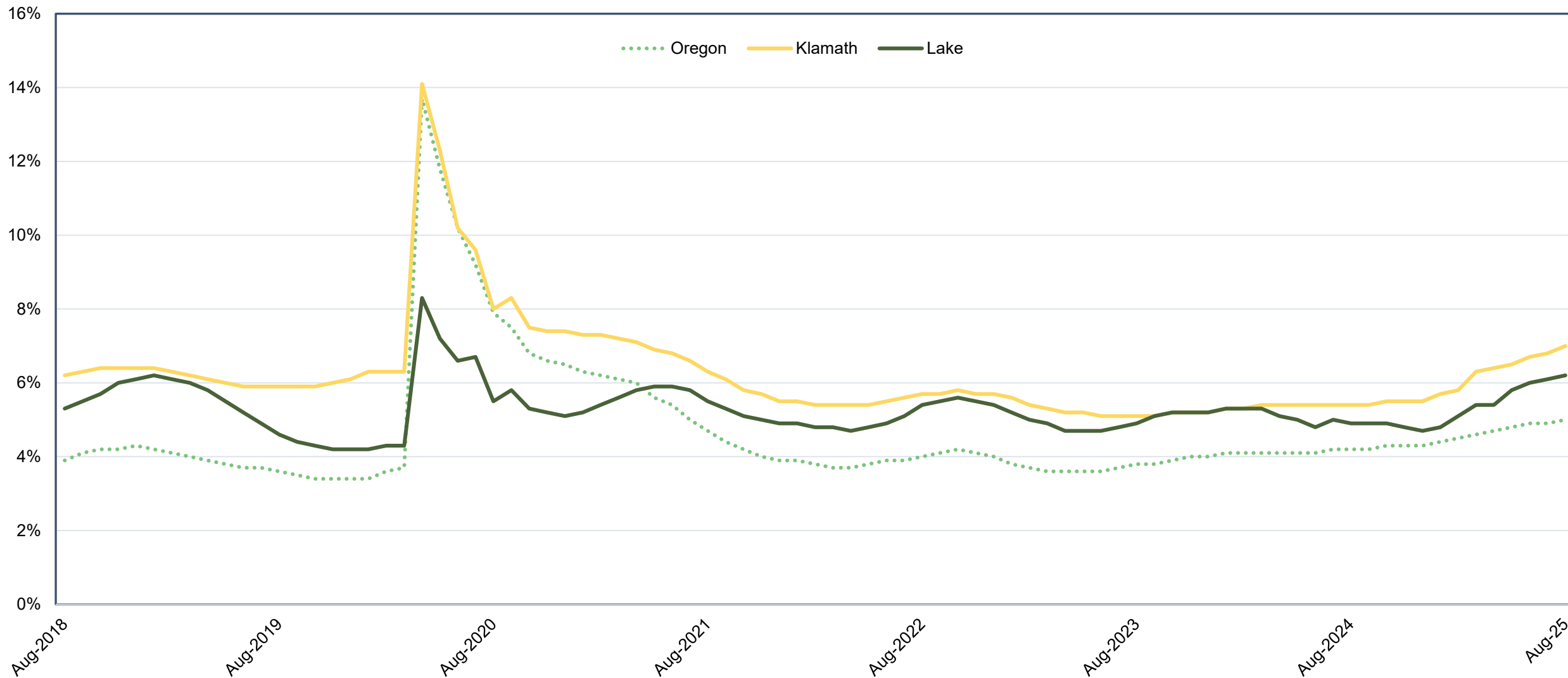
Central Oregon Unemployment Rates
August 2018-2025



Source: Oregon Employment Department, Local Area Unemployment Statistics

UNEMPLOYMENT IN SOUTH CENTRAL

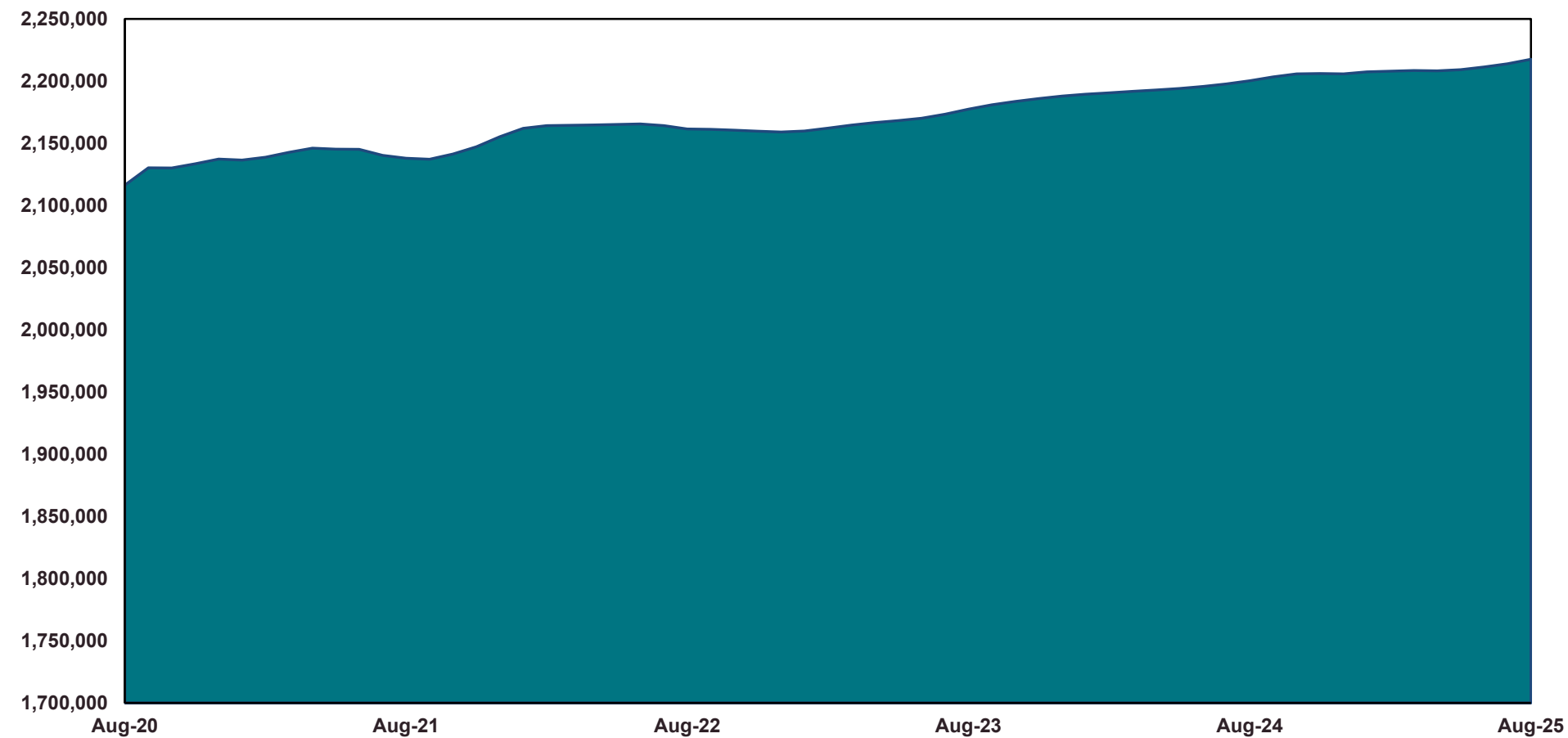
South Central Unemployment Rates
August 2018-2025



Source: Oregon Employment Department, Local Area Unemployment Statistics

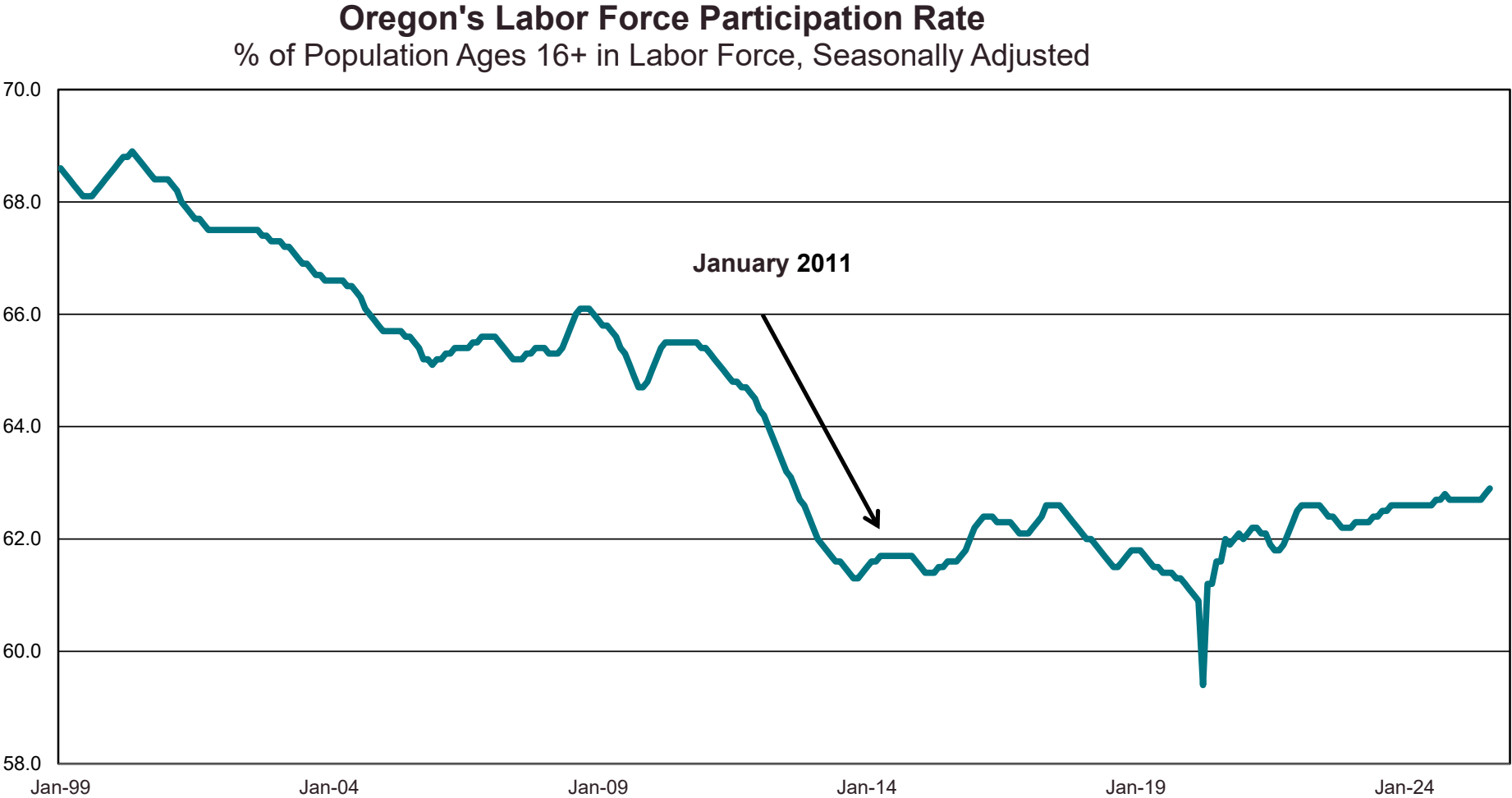
OREGON'S LABOR FORCE HAS GROWN SLOWLY IN RECENT MONTHS.

Oregon Civilian Labor Force, Seasonally Adjusted
2020 to Present



Source: Oregon Employment Department, Local Area Unemployment Statistics

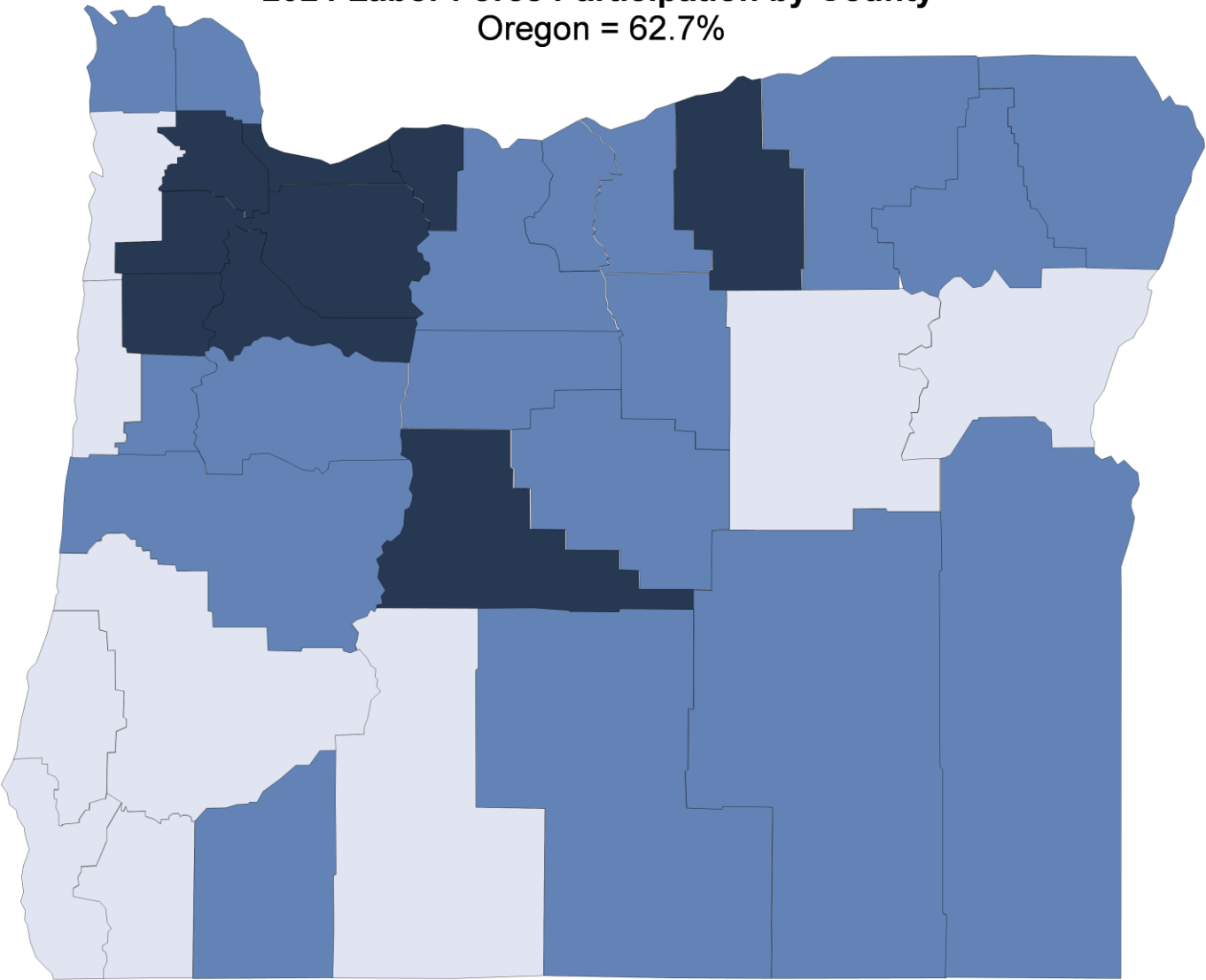
OREGON'S LABOR FORCE PARTICIPATION RATE WAS 62.9% IN AUGUST.



Source: Oregon Employment Department, Local Area Unemployment Statistics

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

2024 Labor Force Participation by County
Oregon = 62.7%



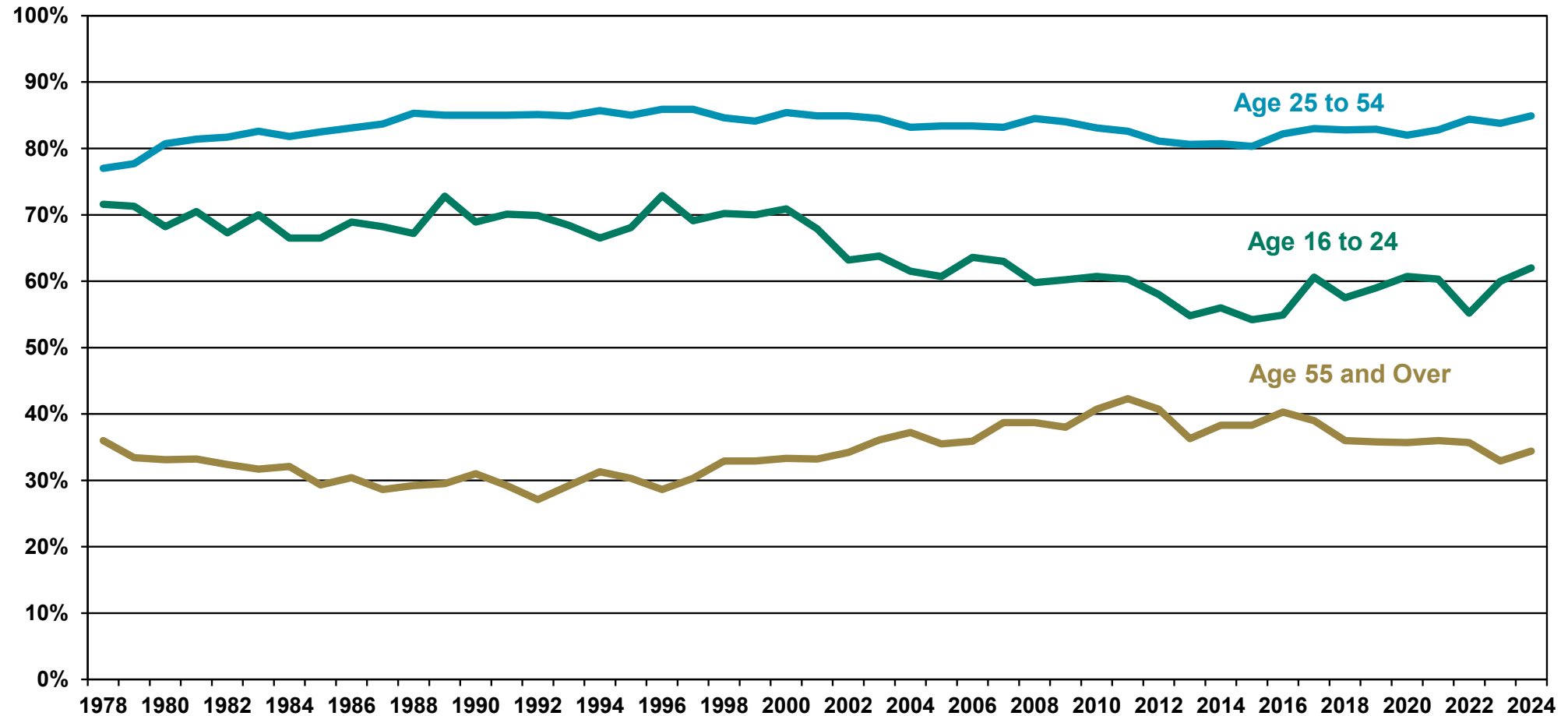
Source: Oregon Employment Department

40.9% - 51.5% 51.6% - 62.2% 62.3% - 72.9%

High
Hood River County
72.9%

Low
Curry County
40.9%

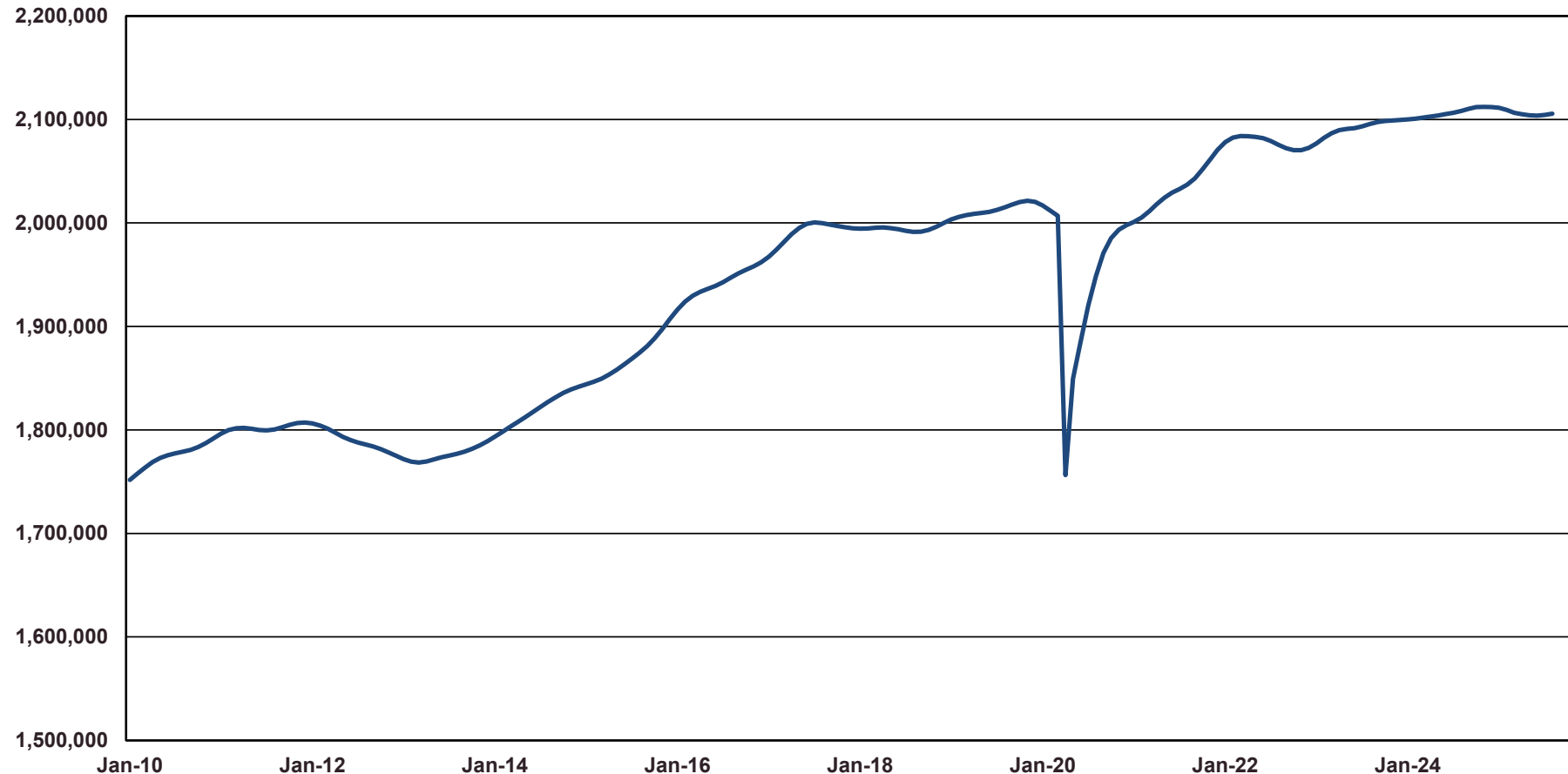
Oregon Labor Force Participation Rates by Age Group



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

TOTAL EMPLOYMENT HAS BEEN GENERALLY STABLE IN RECENT MONTHS.

Total Employed, Oregon
Seasonally Adjusted, 2010 to Present



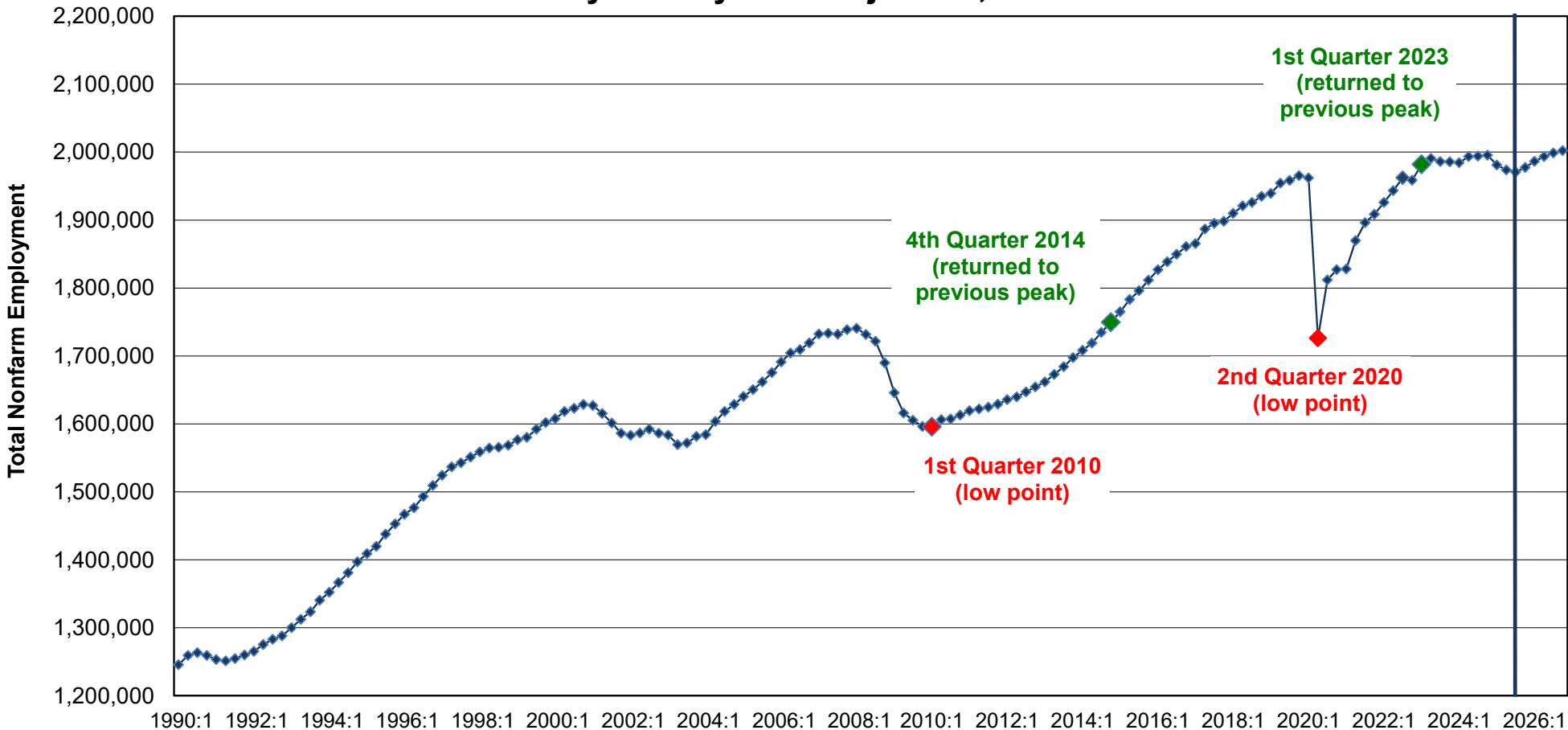
Includes farm jobs and the self-employed, based on place of residence. It includes Oregonians who work – physically or remotely – in Washington or elsewhere.

Source: Oregon Employment Department, Local Area Unemployment Statistics

(This is a different measure than total nonfarm employment)

PROJECTED GROWTH

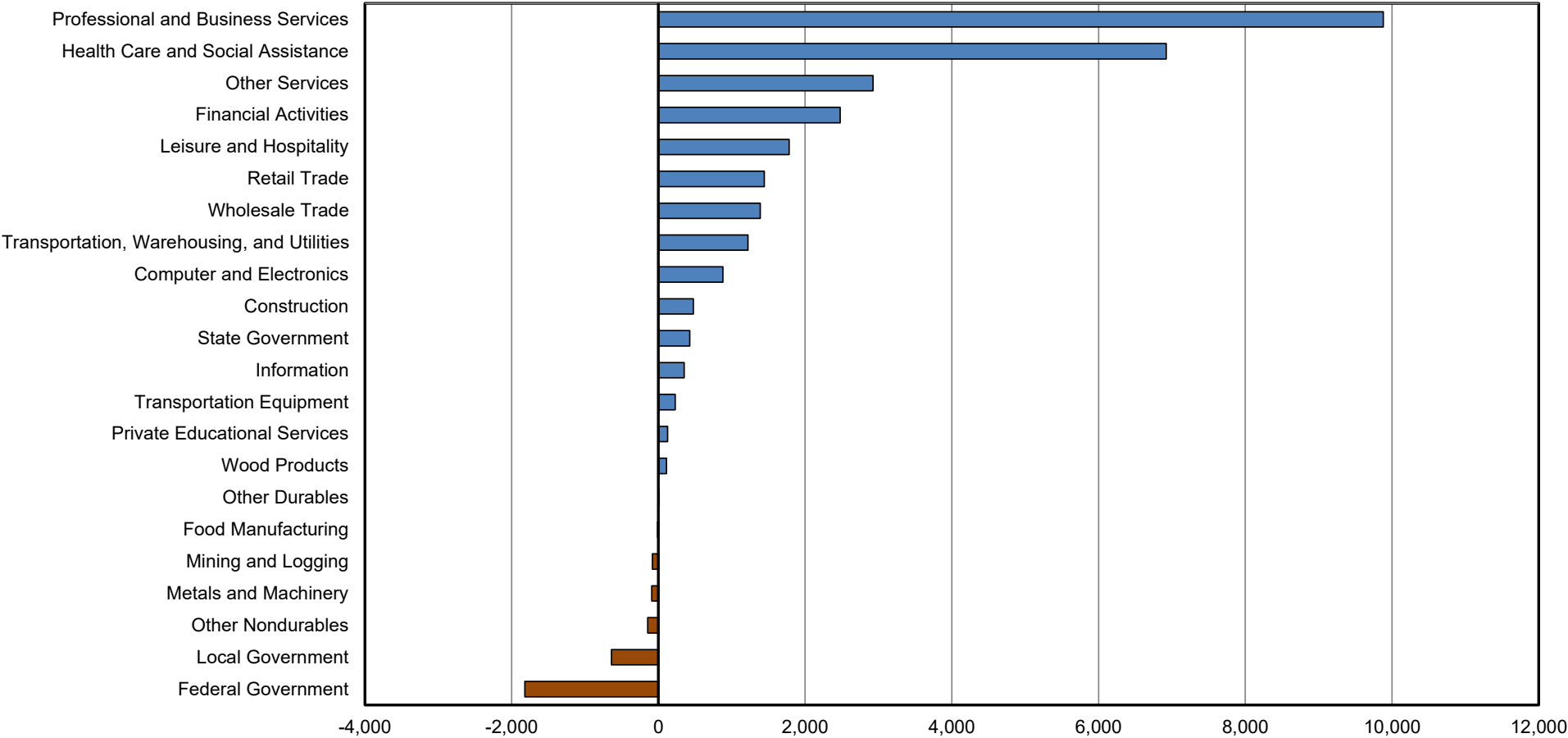
Oregon Nonfarm Payroll Employment Quarterly History and Projection, 1990-2026



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

OEA EXPECTS OREGON TO GAIN ABOUT 28,100 JOBS IN THE NEXT 12 MONTHS.

Expected Job Changes by Industry Sector Over The Year
(3Q2025 - 3Q2026)



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

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 projected to grow the second fastest.

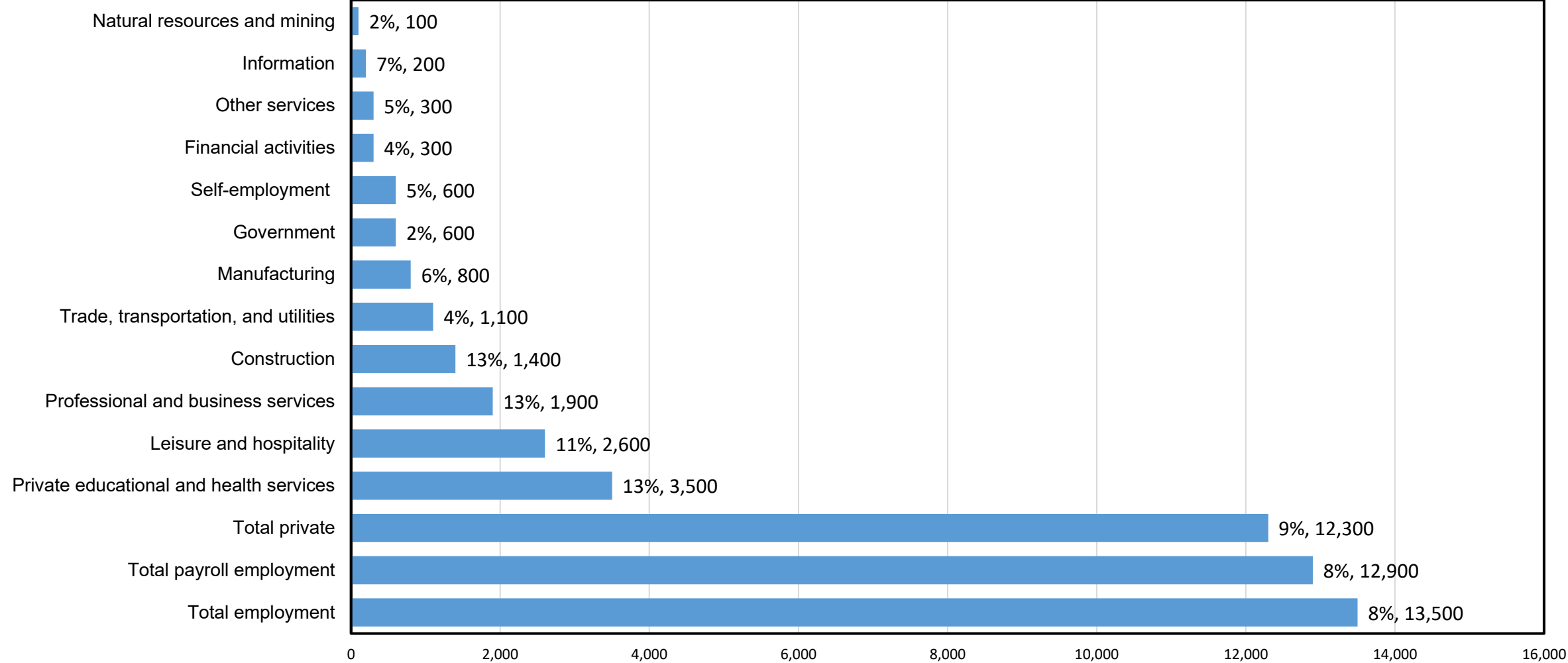
- Growth in construction is driven by strong projected growth in the specialty trades industry.

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

Thank You!

Please scan the QR code for a short survey.



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