

EAST CASCADES WORKFORCE UPDATE

Workforce Investment Board Meeting

January 24, 2024

- ✓ Housing, Income, Age, and Education
- ✓ Job Recovery
- ✓ Demand for Workers
- ✓ The Workforce Supply
- ✓ Projected Growth

HOUSING, INCOME, AGE, AND EDUCATION

Zillow Home Value Index (ZHVI)

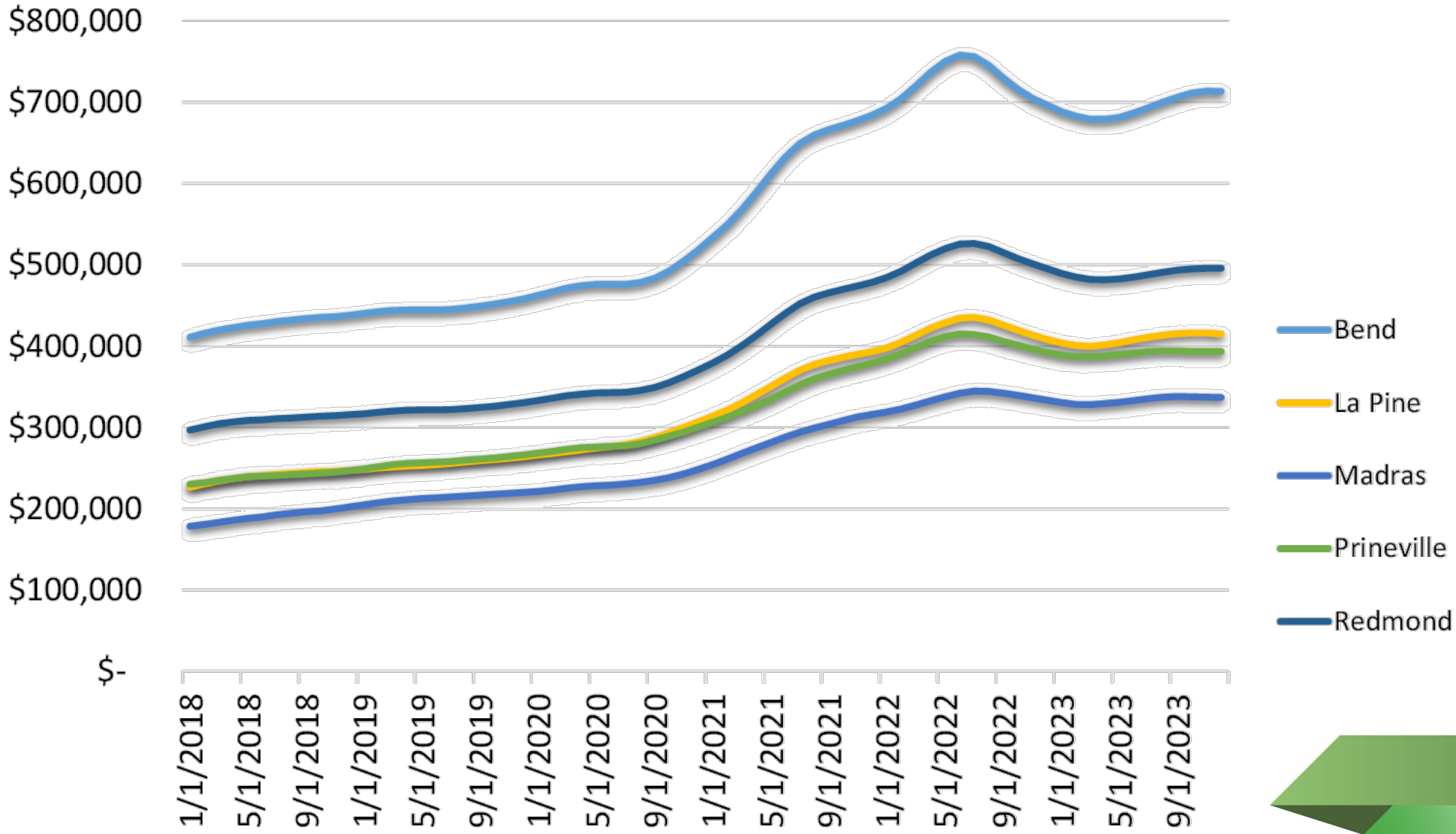
U.S. Census Bureau:

American Community Survey, 2018-2022 5-year
Estimates (ACS)

Quarterly Workforce Indicator (QWI)

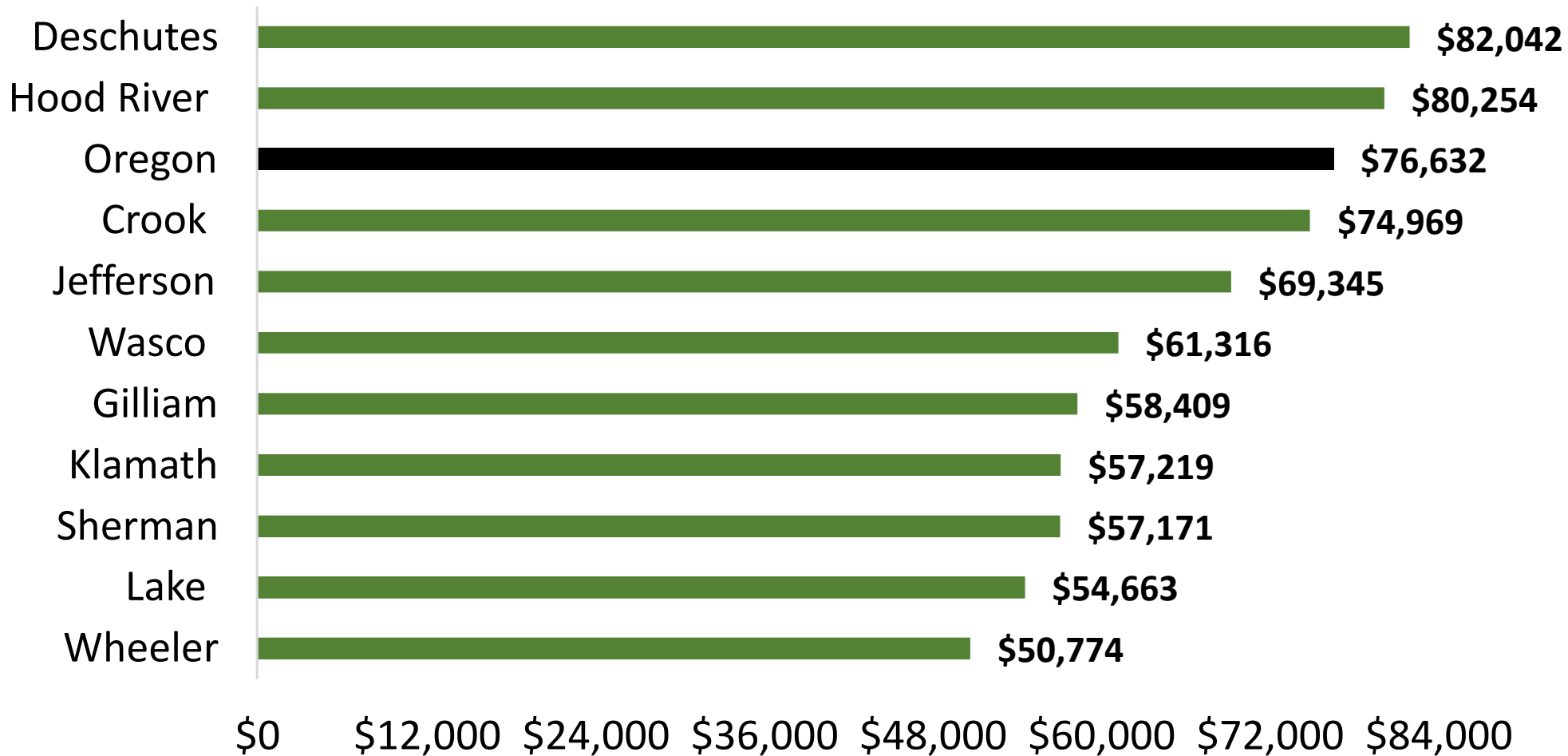
HOME PRICES ROSE DRAMATICALLY DURING THE PANDEMIC

Zillow All Home Price Index



MEDIAN HOUSEHOLD INCOME IN DESCHUTES AND HOOD RIVER HIGHER THAN STATES

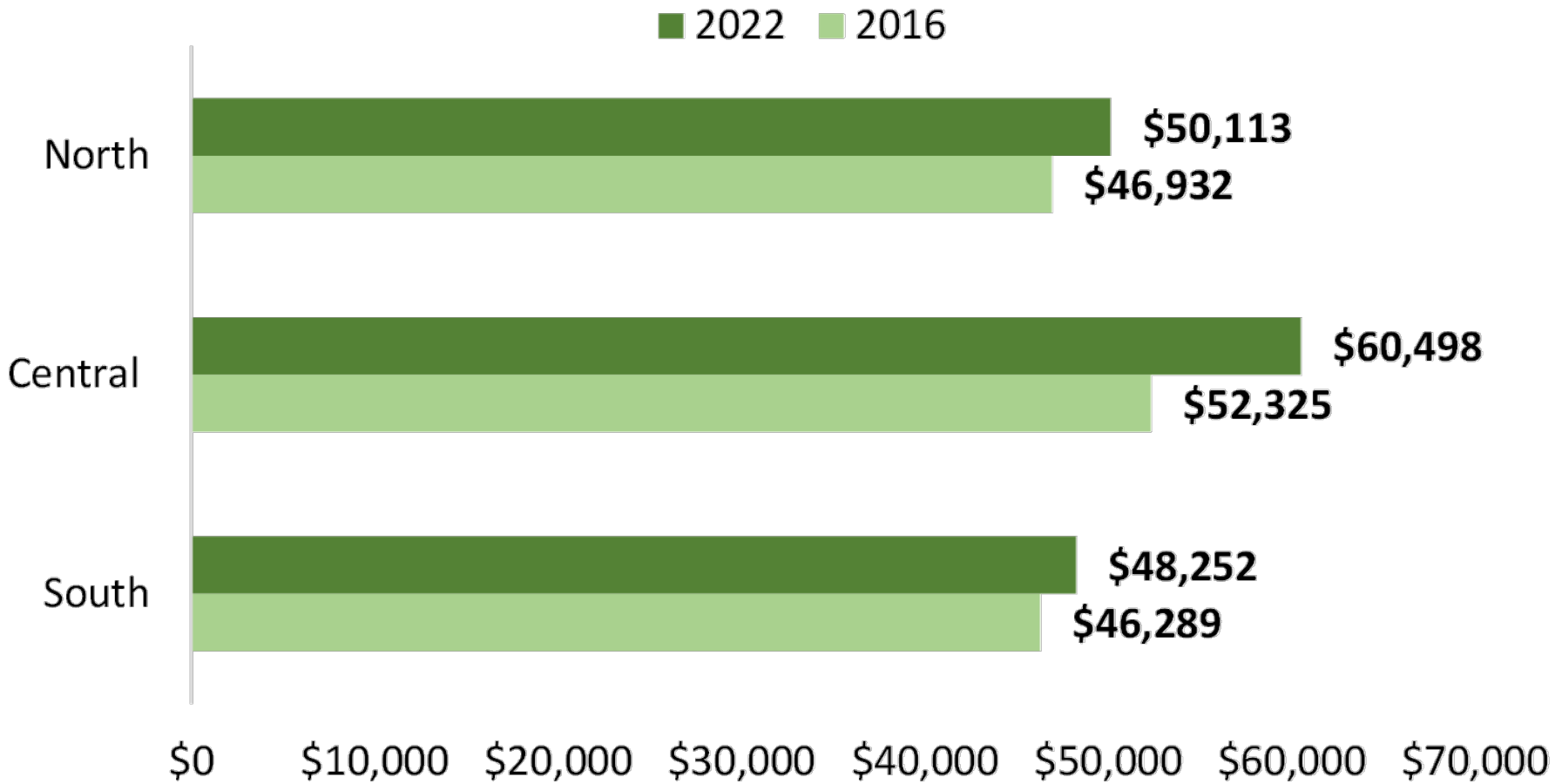
Median Household Income (2017-2022)



Source: U.S. Census Bureau, American Community Survey, 2018 -2022 5-year Estimates

ANNUAL AVERAGE WAGE GAINS SEEN THROUGHOUT THE EAST CASCADES

Real Average Annual Wage in the East Cascades



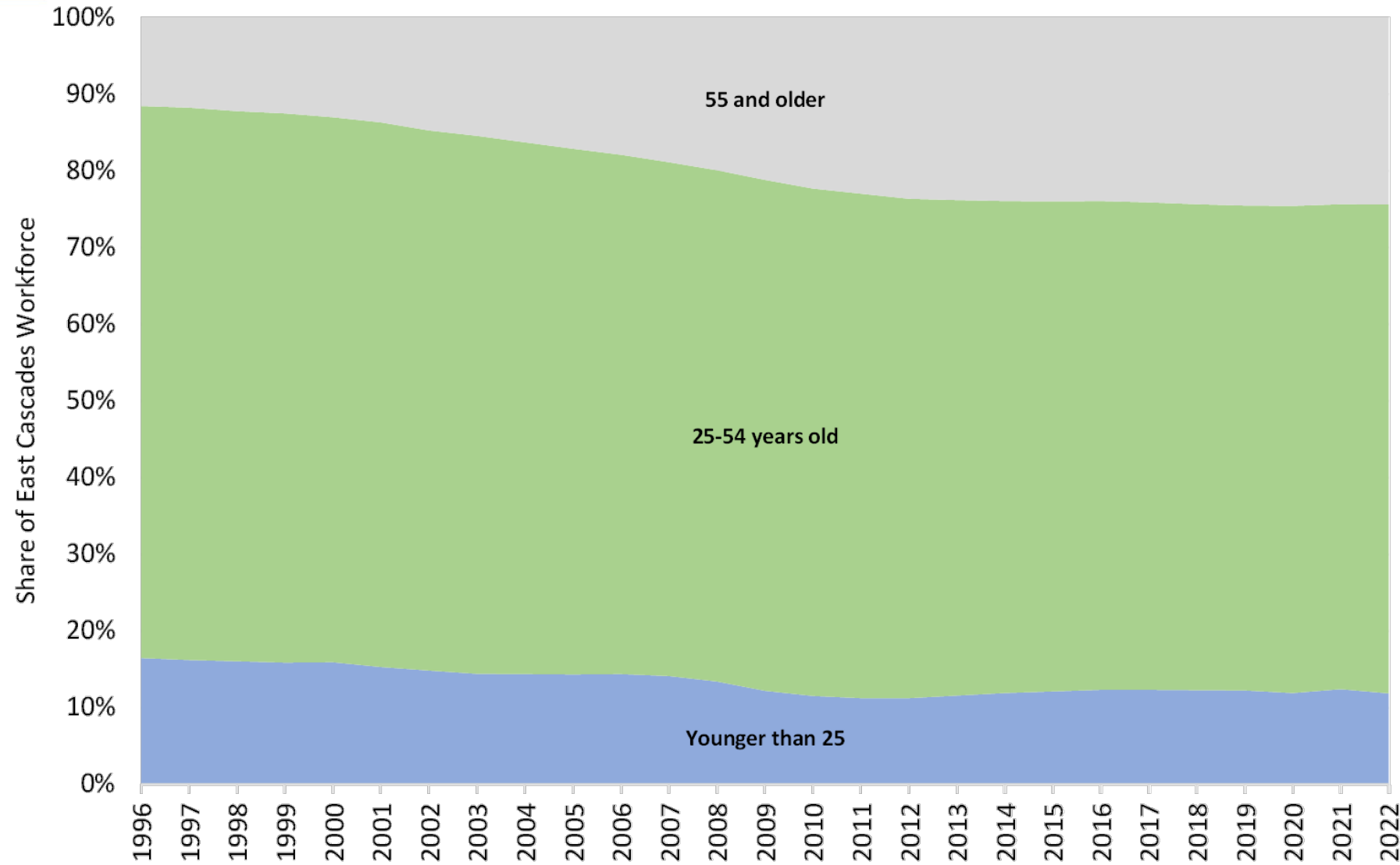
Source: Oregon Employment Department, Quarterly Census of Employment and Wages

WAGES VARY BY INDUSTRY

Deschutes County, 2022

	Annual Avg. Wage
Information	\$109,173
Unclassified	\$89,127
Financial Activities	\$80,360
Professional and Business Services	\$76,357
Education and Health Services	\$69,992
Construction	\$67,870
Total All Government	\$66,427
Total All Ownerships	\$60,430
Total Private Coverage	\$59,717
Manufacturing	\$59,106
Natural Resources and Mining	\$51,586
Trade, Transportation and Utilities	\$51,578
Other Services	\$45,595
Leisure and Hospitality	\$30,539

The Aging of the Workforce

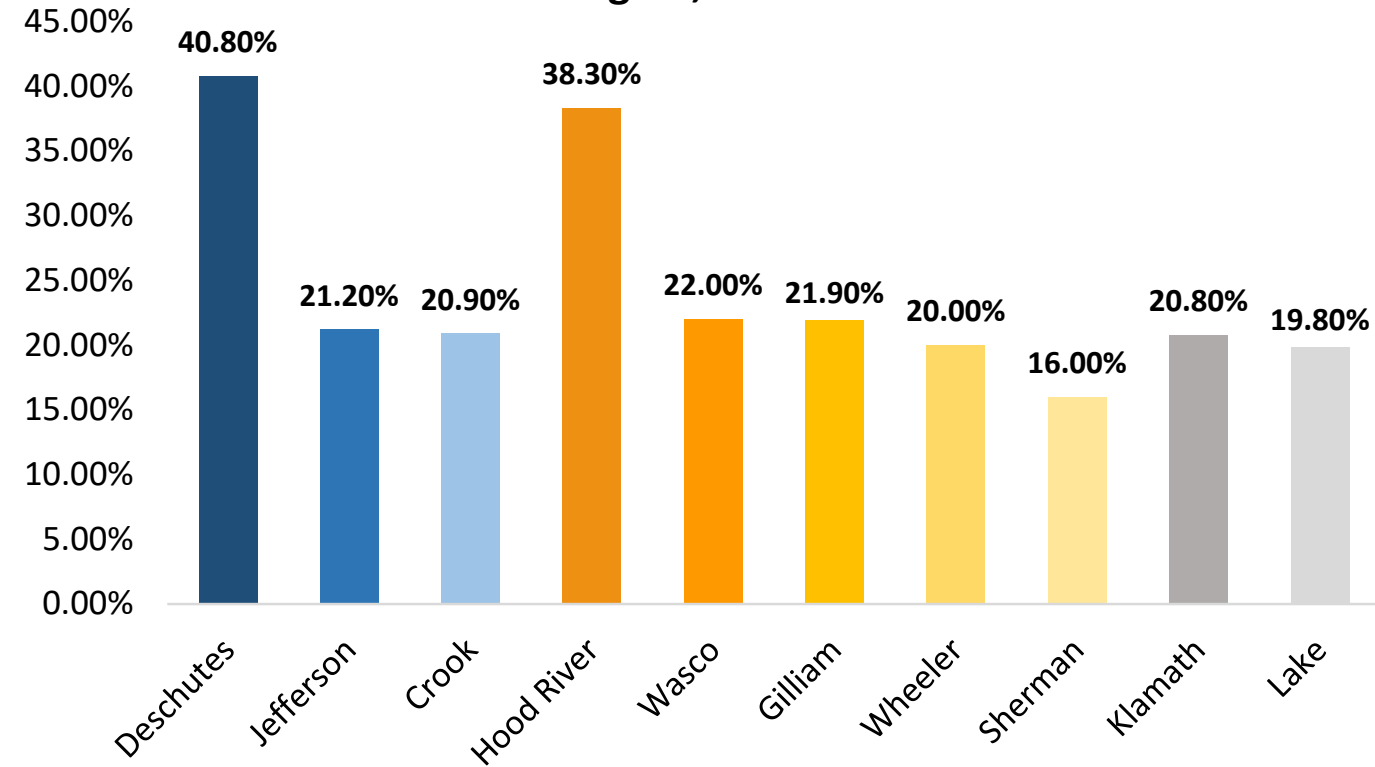


Employment by Age Group			
Year	Younger than 25	25-54 years old	55 and older
2022	12%	64%	24%

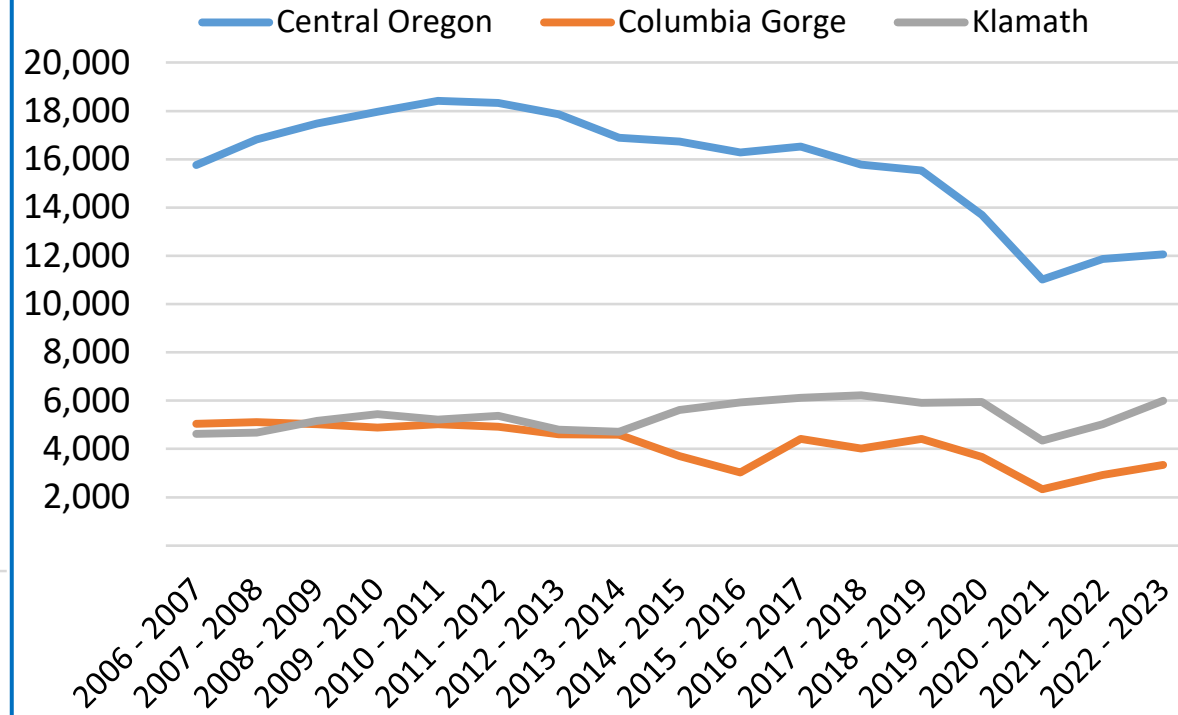
Source: U.S. Census Bureau, Quarterly Workforce Indicators

EDUCATION IN THE EAST CASCADES

Share of the Population 25+ with a Bachelor's Degree or Higher, 2018-2022



Community College Institution Enrollment (2016-2023)



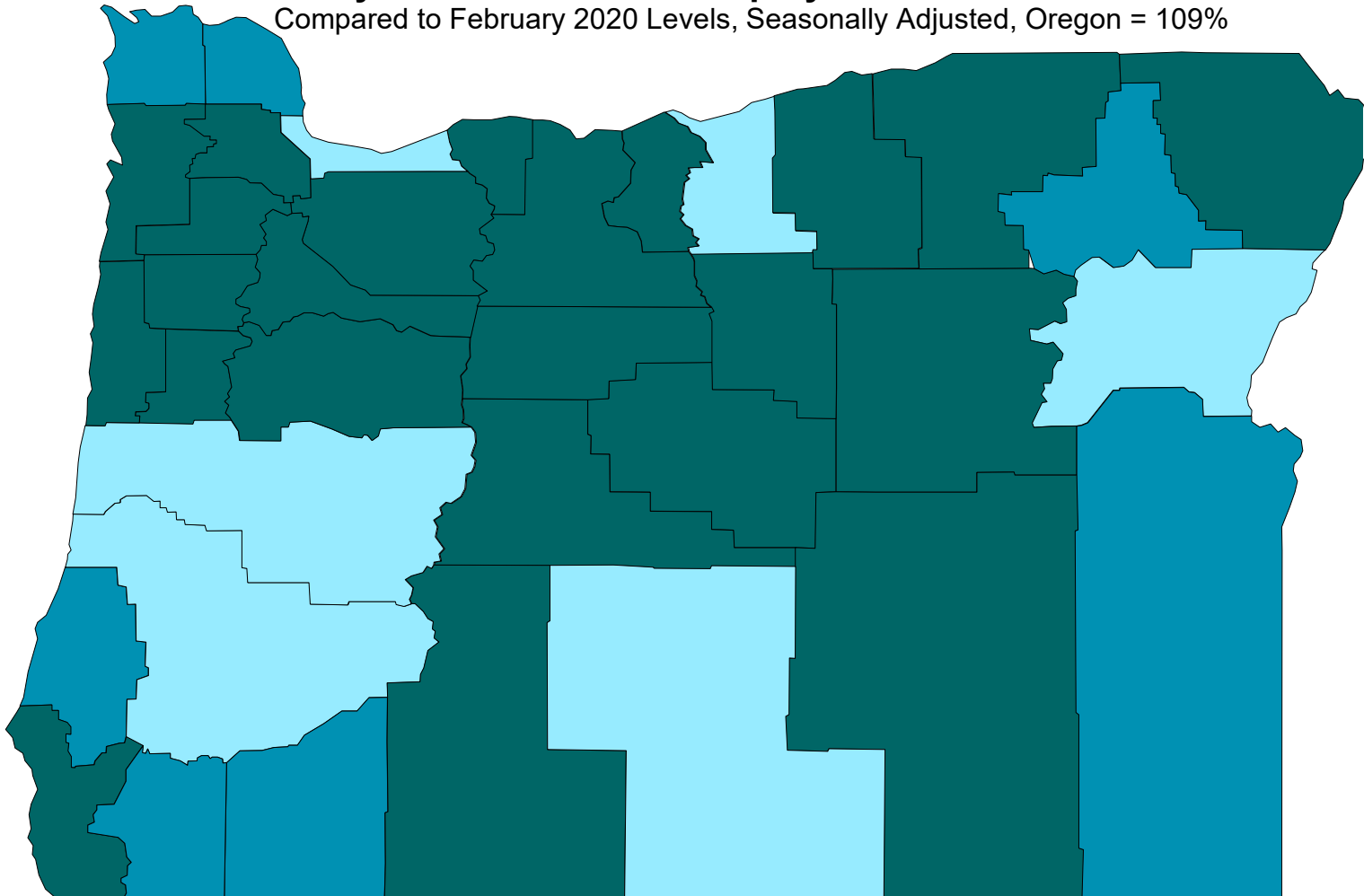
JOB RECOVERY

Quarterly Census of Employment and Wages (QCEW)
Current Employment Statistics (CES)

OREGON HAS MORE JOBS NOW THAN BEFORE THE PANDEMIC RECESSION

Recovery of Total Nonfarm Employment as of November 2023

Compared to February 2020 Levels, Seasonally Adjusted, Oregon = 109%



Twenty-three counties have regained their total pandemic recession job losses:

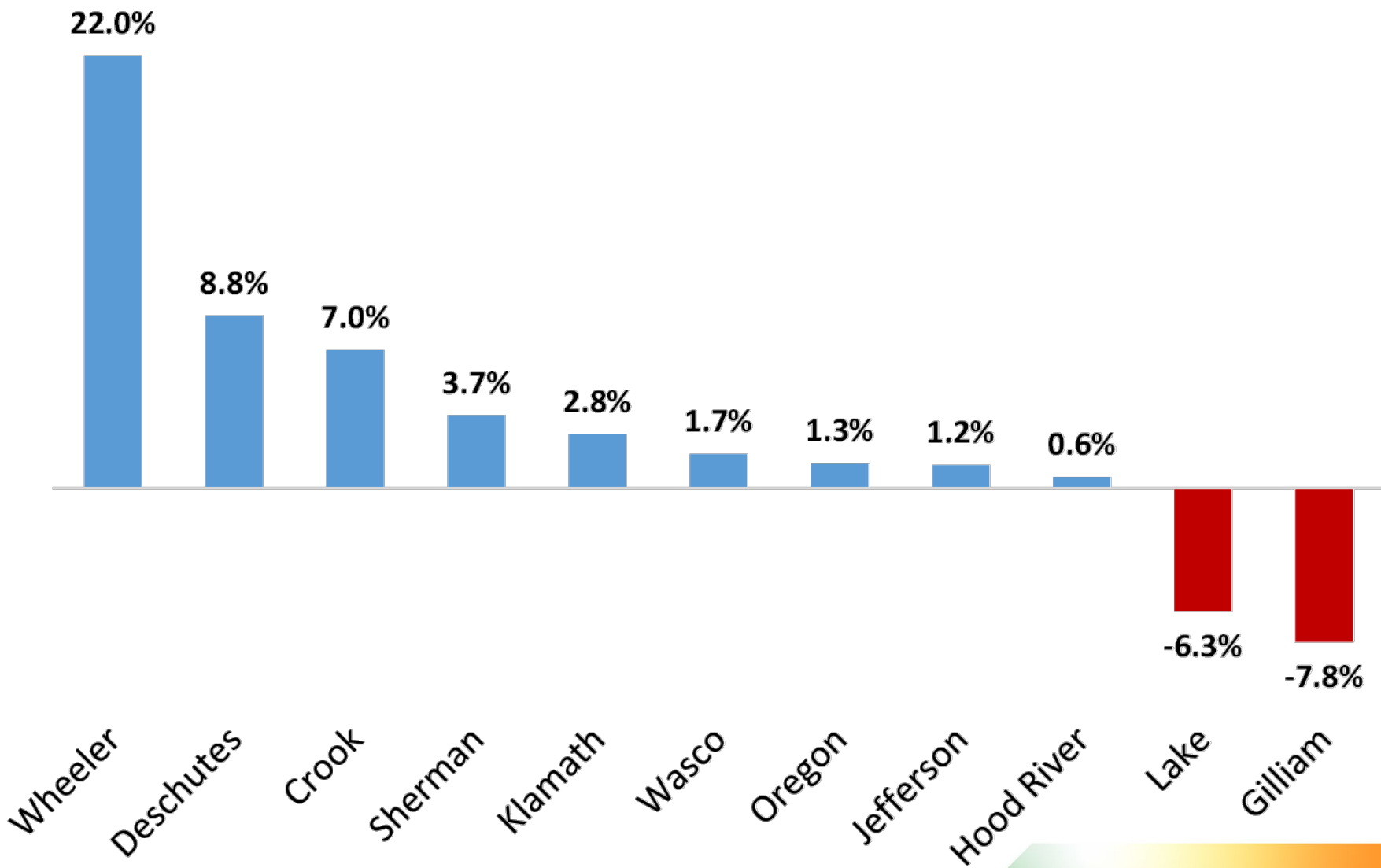
- Benton
- Clackamas
- Crook
- Curry
- Deschutes
- Grant
- Harney
- Hood River
- Jefferson
- Klamath
- Lincoln
- Linn
- Marion
- Morrow
- Polk
- Sherman
- Tillamook
- Umatilla
- Wallowa
- Wasco
- Washington
- Wheeler
- Yamhill

Source: Oregon Employment Department



EMPLOYMENT RECOVERY BY COUNTY

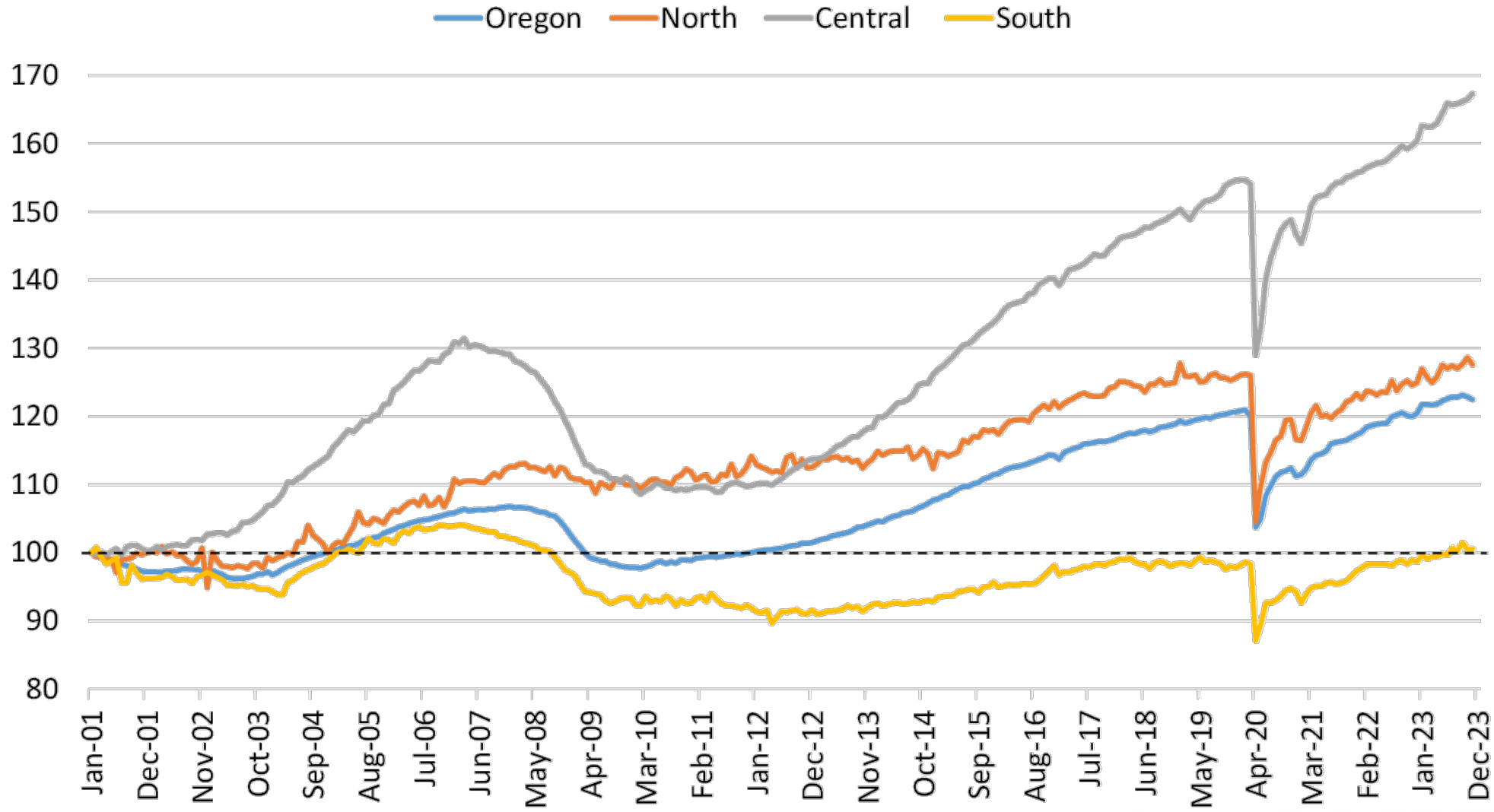
Percent Change in Covered Employment Feb. 2020 - Nov. 2023



Source: Oregon Employment Department, Current Employment Statistics

EMPLOYMENT RECOVERY BY REGION

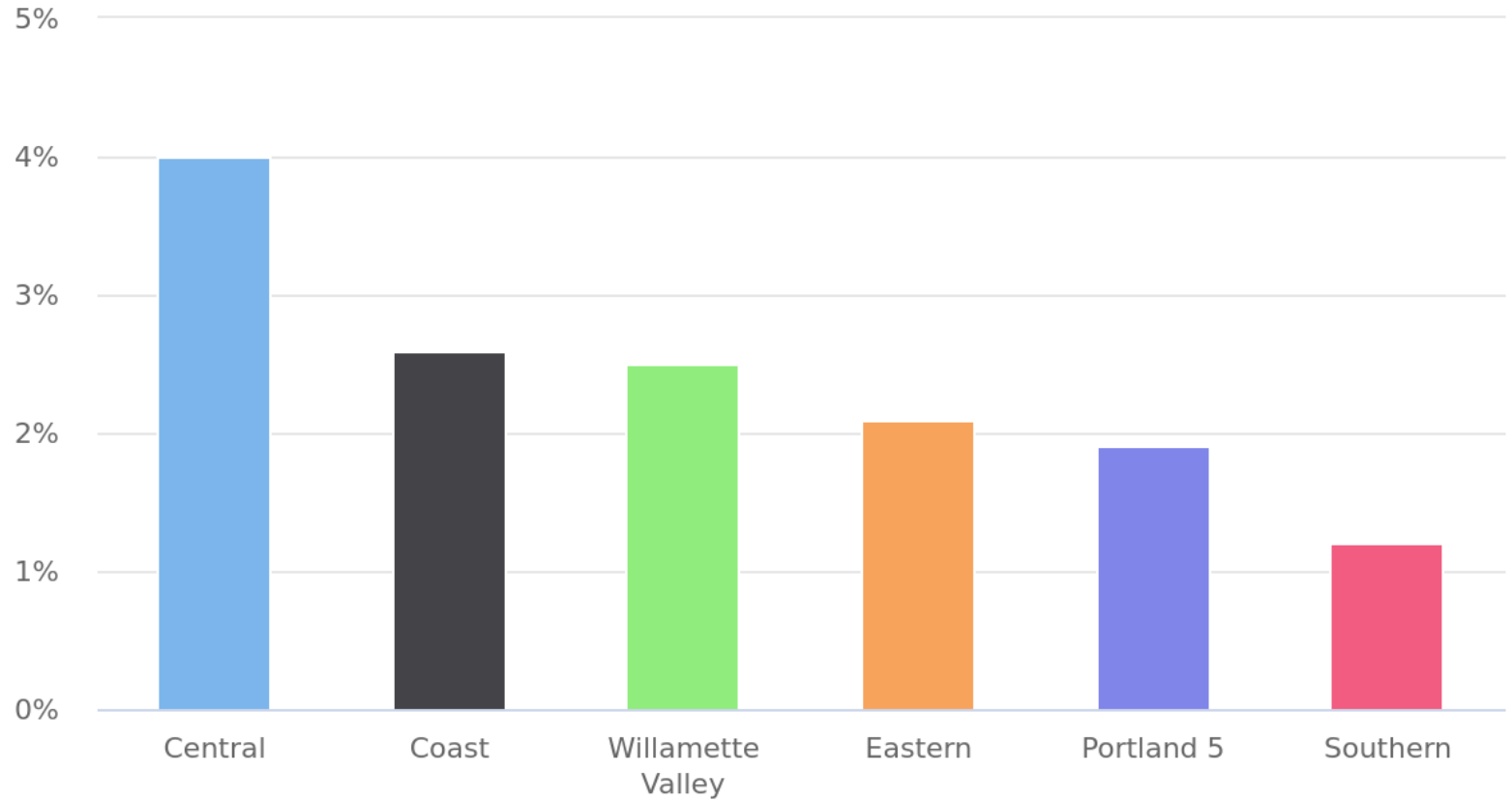
Long-term Employment Trends Vary Dramatically Across the East Cascades



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

Over-the-Year Employment Change by Region

November 2022 to November 2023, Seasonally Adjusted Nonfarm Employment



Oregon Employment Department, Current Employment Statistics

BUSINESSES' NEED FOR WORKERS

Job Vacancy Survey (JVS)
Help Wanted Online Advertisements (HWOL)

Oregon Job Vacancies

	2019	2020	2021	2022	Spring 2023	Summer 2023
Vacancies	57,241	44,408	96,887	103,977	69,171	70,485
Average Hourly Wage	\$18.81	\$18.05	\$19.69	\$21.66	\$27.41	\$23.81
Full-time Positions	77%	79%	78%	81%	87%	81%
Permanent Positions	93%	92%	93%	94%	95%	97%
Requiring Education Beyond High School	34%	33%	30%	29%	44%	36%
Requiring Previous Experience	57%	53%	53%	52%	62%	66%
Difficult to Fill	57%	51%	72%	72%	59%	57%

BUSINESSES REPORTED HIRING ACROSS ALL BROAD INDUSTRIES

Oregon Job Vacancies by Industry, Summer 2023

Industry	Vacancies
All Industries	70,485
Health care and social assistance	19,153
Leisure and hospitality	9,232
Retail trade	9,189
Management, administrative, and waste services	7,678
Construction	5,258
Professional, scientific, and technical services	4,653
Other services	4,620
Manufacturing	2,863
Financial activities	2,178
Natural resources and mining	2,082
Wholesale trade	1,646
Transportation, warehousing, and utilities	1,422
Private educational services	417
Information	94

Source: Oregon Employment Department

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

Source: Oregon Employment Department, JVS

VACANCIES DECLINED OVER THE YEAR IN EVERY REGION.

Oregon Job Vacancies by Geography, Spring 2023

Geography	Vacancies
Oregon Statewide	69,171
Portland Metro	24,338
East Cascades	7,871
Mid-Valley	7,032
Lane	6,489
Rogue Valley	6,290
Clackamas	4,827
Northwest Oregon	3,968
Southwestern Oregon	3,249
Eastern Oregon	2,813

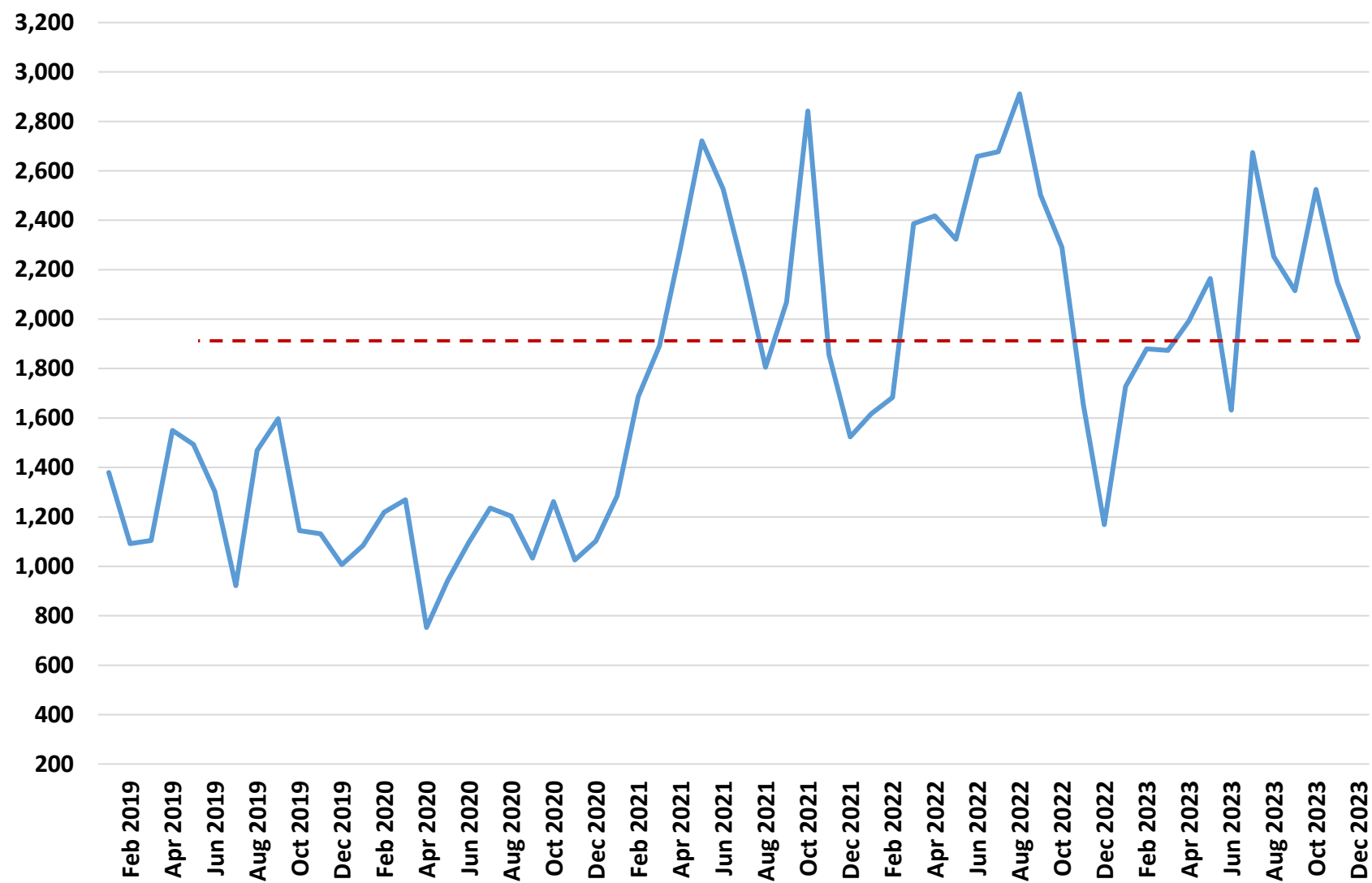
Oregon Job Vacancies by Geography, Summer 2023

Geography	Vacancies
Oregon Statewide	70,485
Portland Metro	22,154
Mid-Valley	11,986
Clackamas	7,480
Lane	6,804
East Cascades	6,780
Rogue Valley	4,677
Northwest Oregon	4,096
Eastern Oregon	2,812
Southwestern Oregon	2,787

Unknown/multiple regions excluded

UNIQUE ADS HAVE DECLINED OVER THE MONTH BUT HAVE INCREASED YEAR-OVER-YEAR

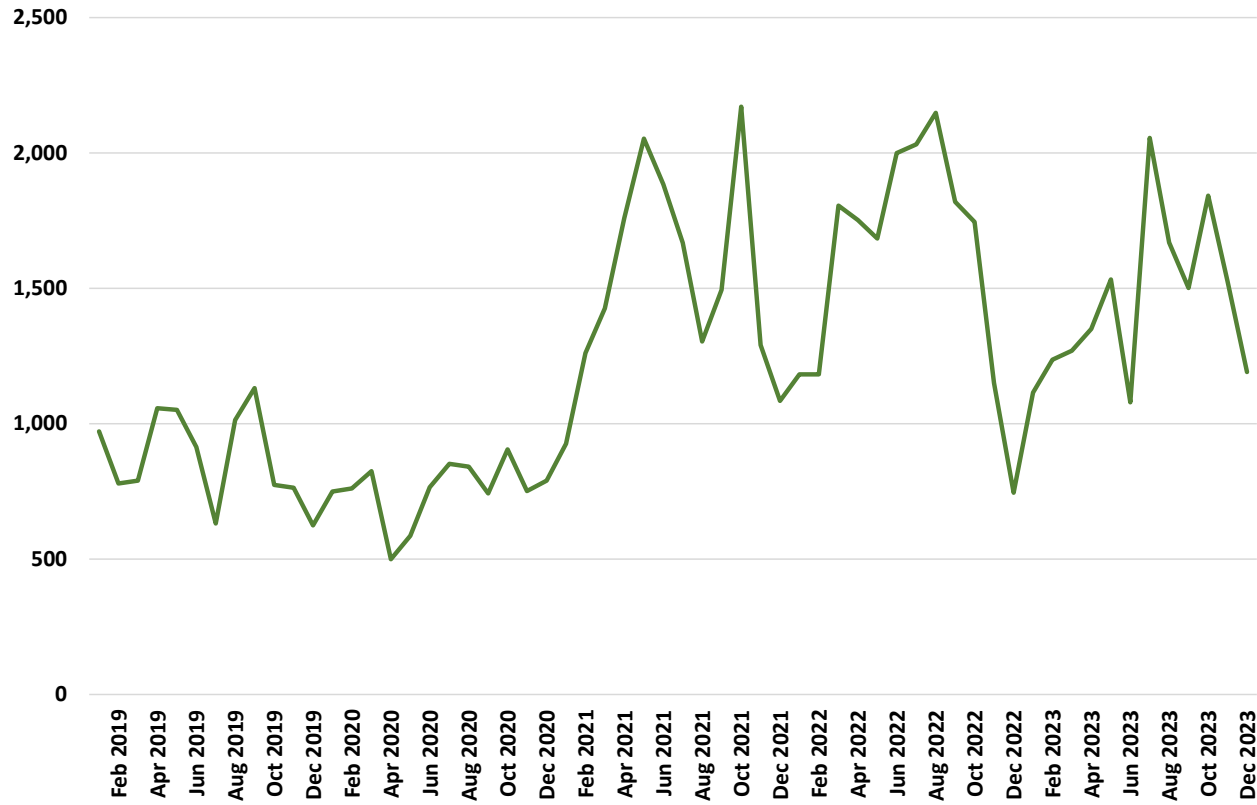
Unique Postings in the East Cascades from January 2019 to December 2023



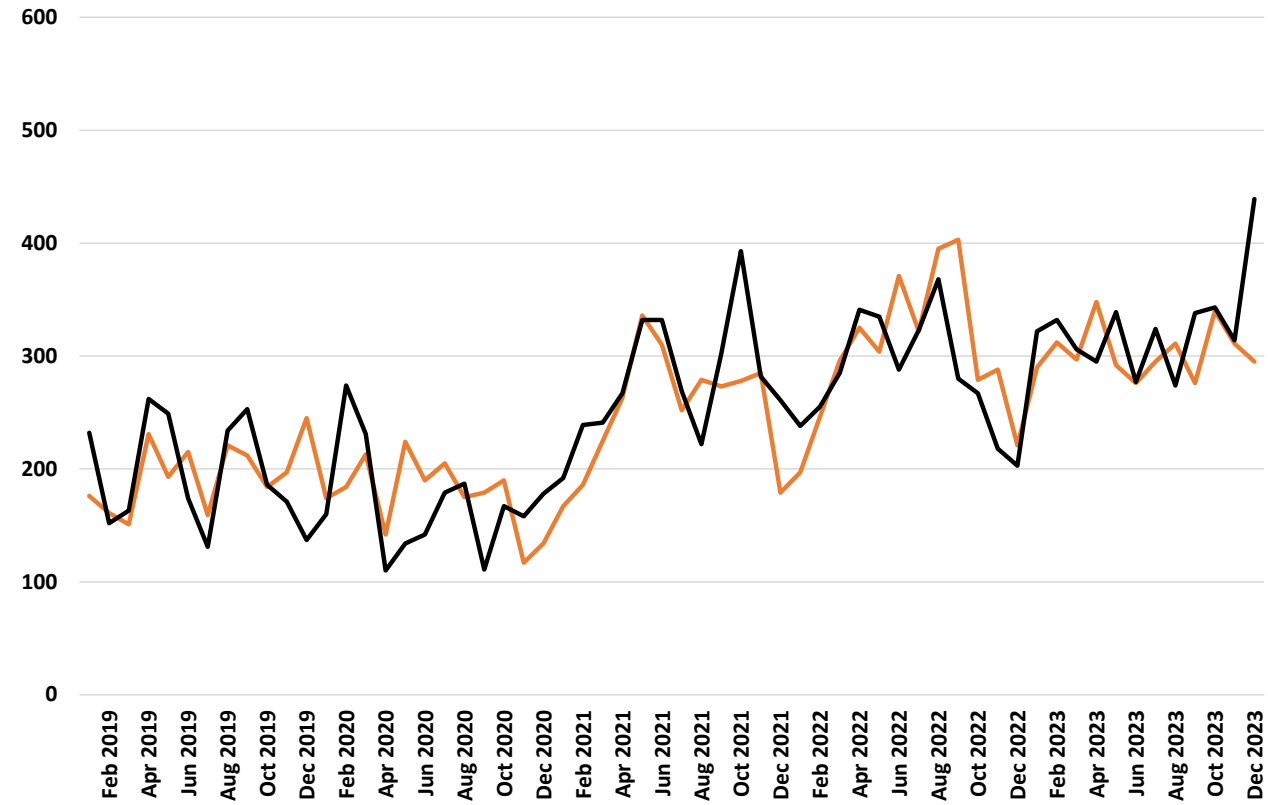
Source: The Conference Board Help Wanted OnLine™ (HWOL)

UNIQUE HELP WANTED ONLINE ADS BY REGION

Unique Postings in the **Central Oregon** from January 2019 to December 2023



Unique Postings in the **Columbia Gorge and South Central** from January 2019 to December 2023



WORKFORCE SUPPLY

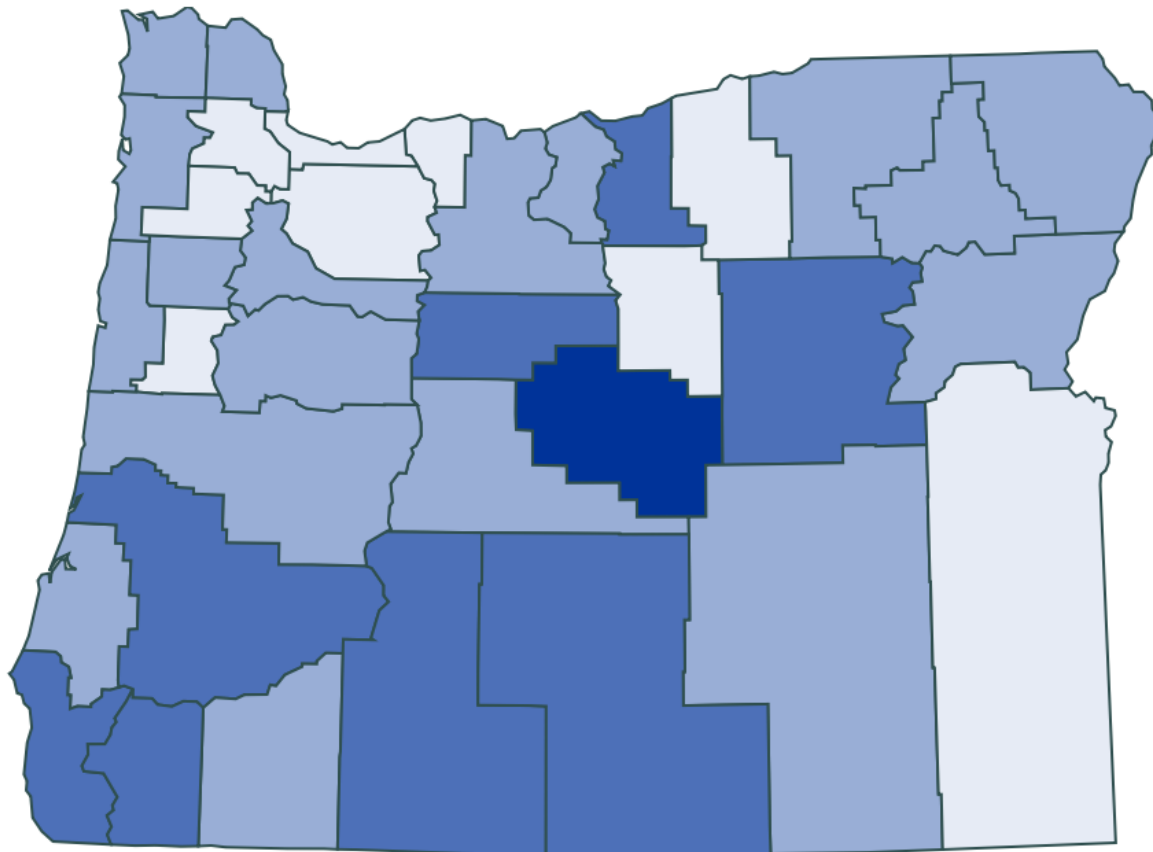
Local Area Unemployment Statistics (LAUS)

Current Population Survey (CPS)

Quarterly Census of Employment and Wages (QCEW)

Seasonally Adjusted Unemployment Rate

November 2023



Unemployment Rates (%)



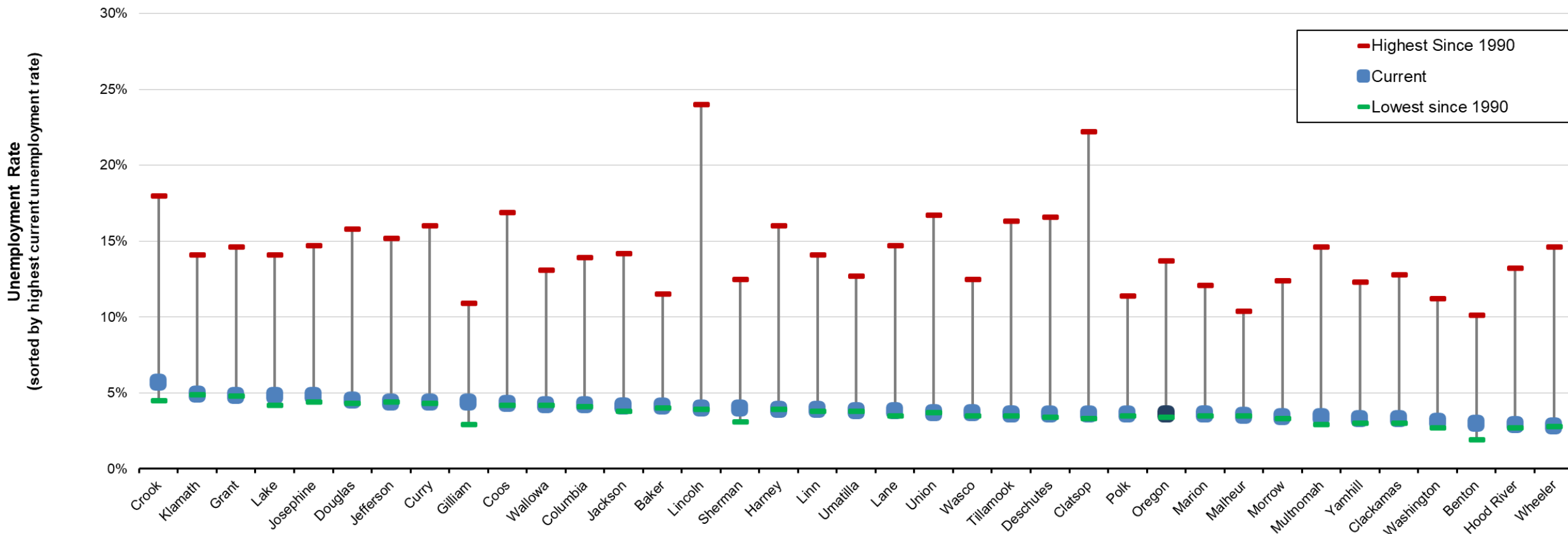
Oregon Employment Department, Local Area Unemployment Statistics

- ✓ Unemployment rates declined or remained unchanged in 27 of Oregon's 36 counties in November 2023, and increased in nine.
- ✓ Crook County had Oregon's highest seasonally adjusted unemployment rate (5.7%) in November.
- ✓ Wheeler County registered the lowest unemployment rate (2.8%).

UNEMPLOYMENT RATES ARE AT OR NEAR HISTORIC LOWS

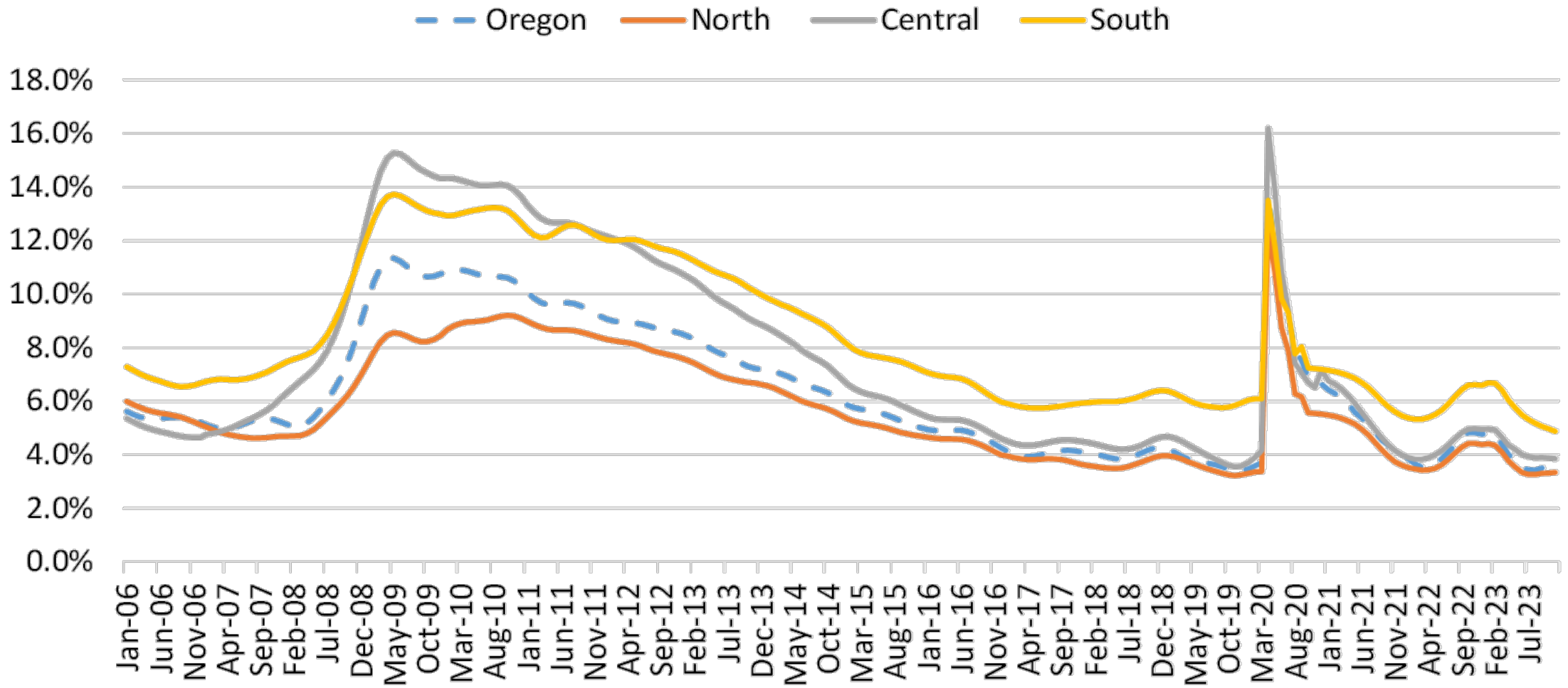
Unemployment Rates in Oregon Counties

Current Rate (November 2023), Record High, and Record Low for Each County, Seasonally Adjusted



Source: Oregon Employment Department, Local Area Unemployment Statistics

Seasonally Adjusted Unemployment Rate by Area, 2006-2023

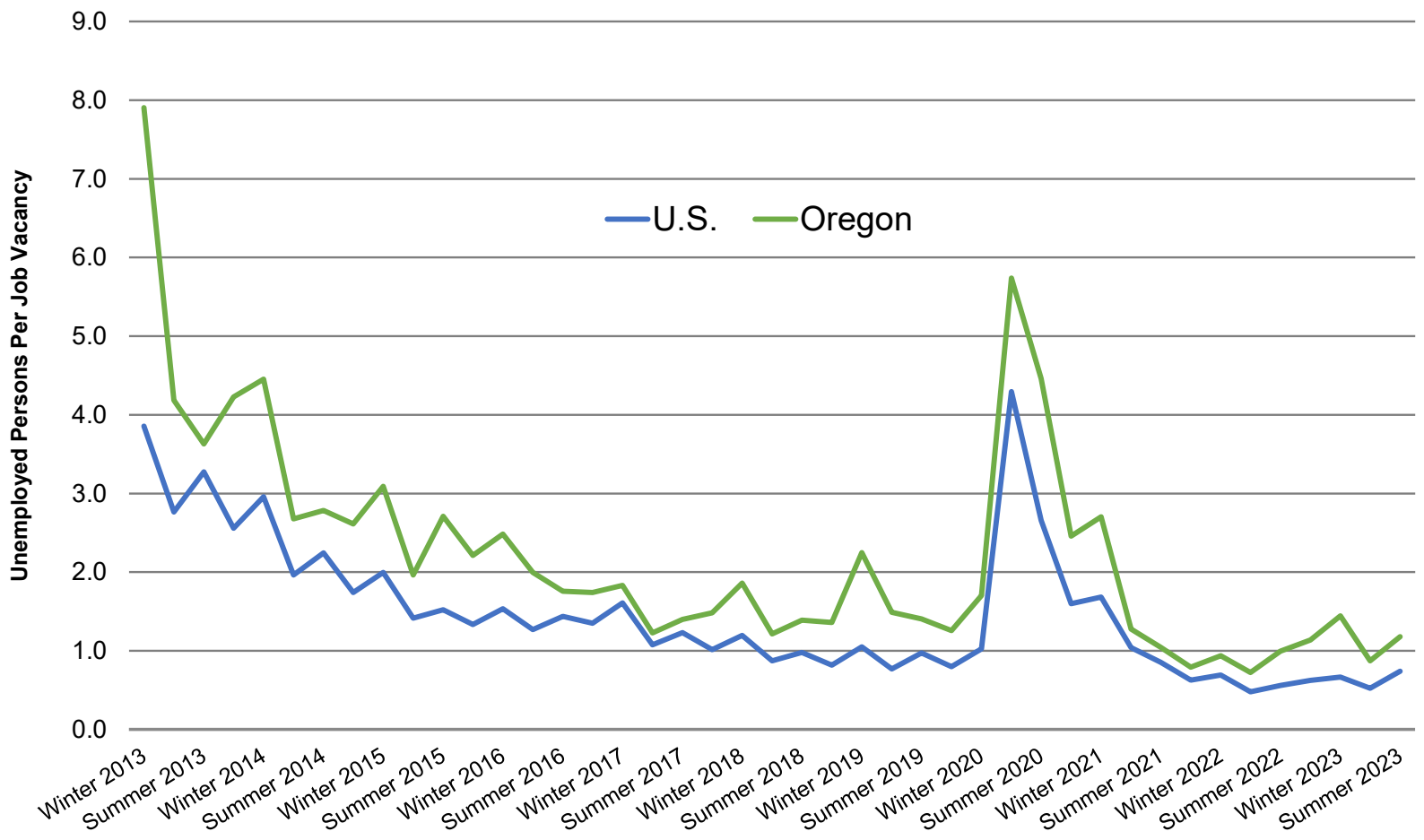


Source: Oregon Employment Department, LAUS

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

U.S. and Oregon Unemployed to Job Vacancy Ratios Still Low after Spring 2020 Peak

(Job Openings with Private Employers, 2013-2023)

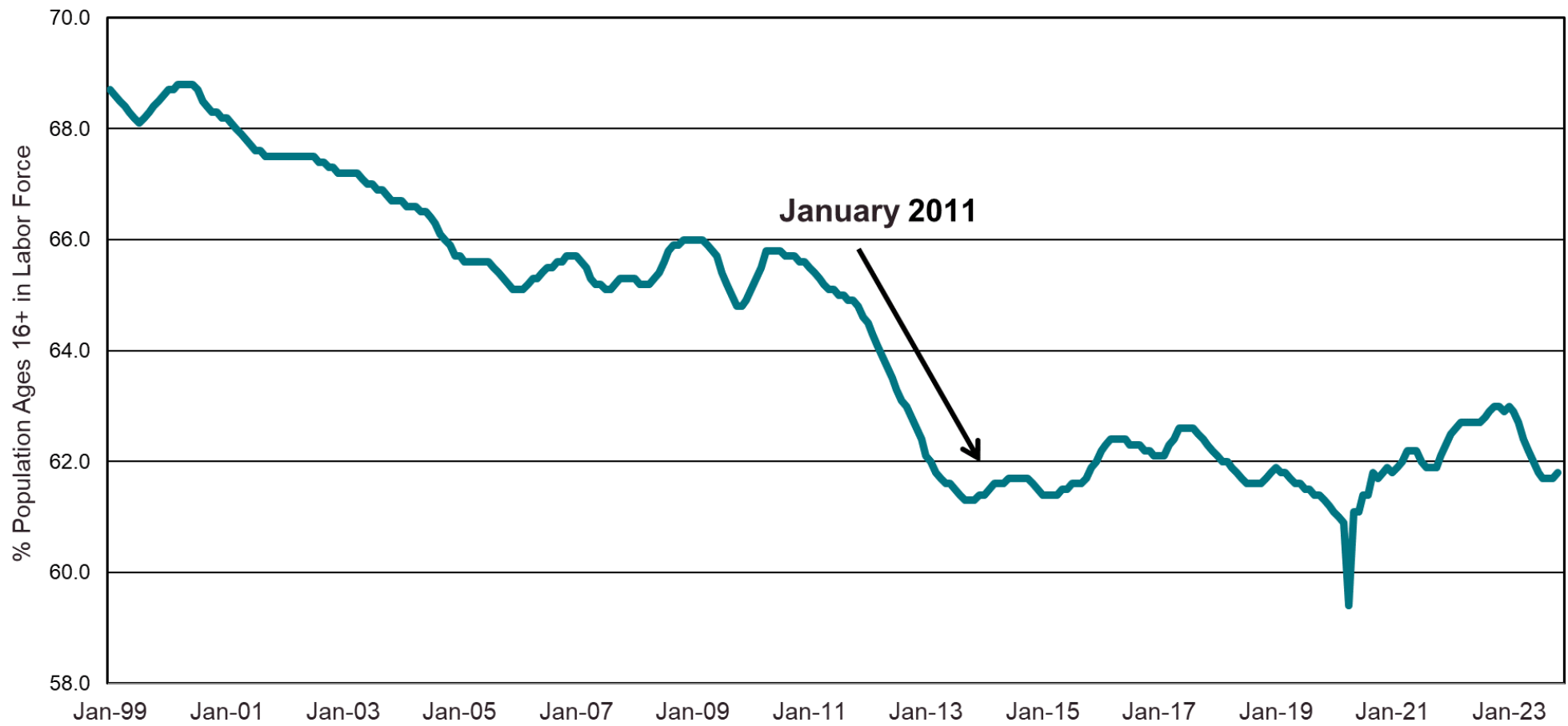


Source: Oregon Employment Department

- ✓ Oregon's unemployed-to-vacancy ratio has been below pre-pandemic levels for the past two years.
- ✓ Oregon had 1.2 unemployed per job vacancy in summer 2023, up from 1.0 in summer 2022 but still much lower than the peak of 5.7 in May 2020.

OREGON'S LABOR FORCE PARTICIPATION RATE WAS 61.8% IN NOVEMBER

Oregon Labor Force Participation Rate

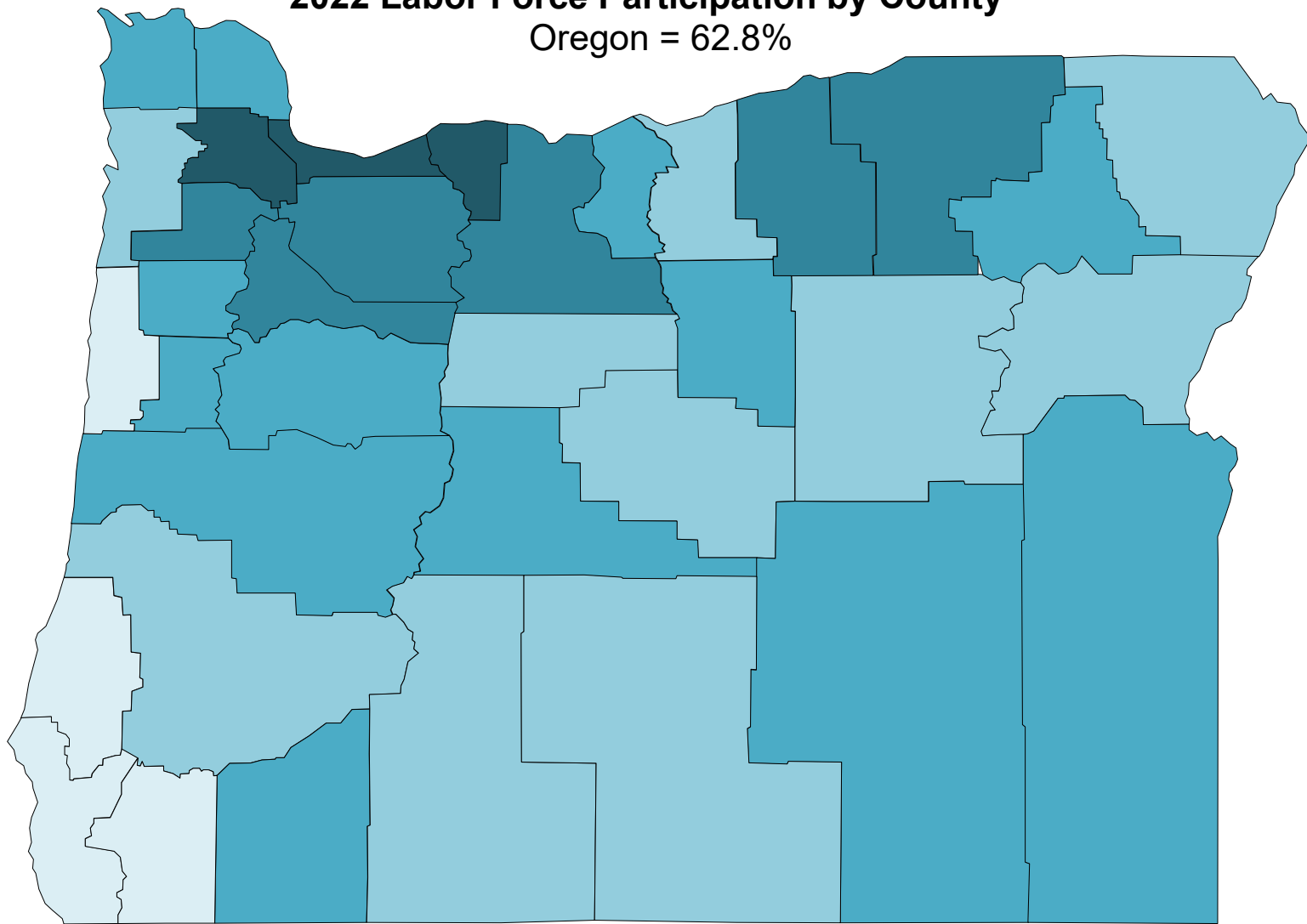


Source: Oregon Employment Department, Local Area Unemployment Statistics

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

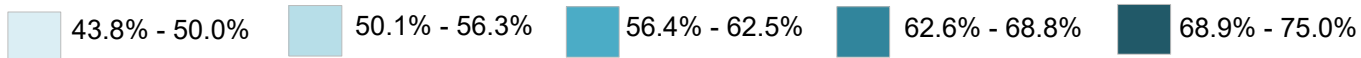
2022 Labor Force Participation by County

Oregon = 62.8%



High
Hood River County
75.0%

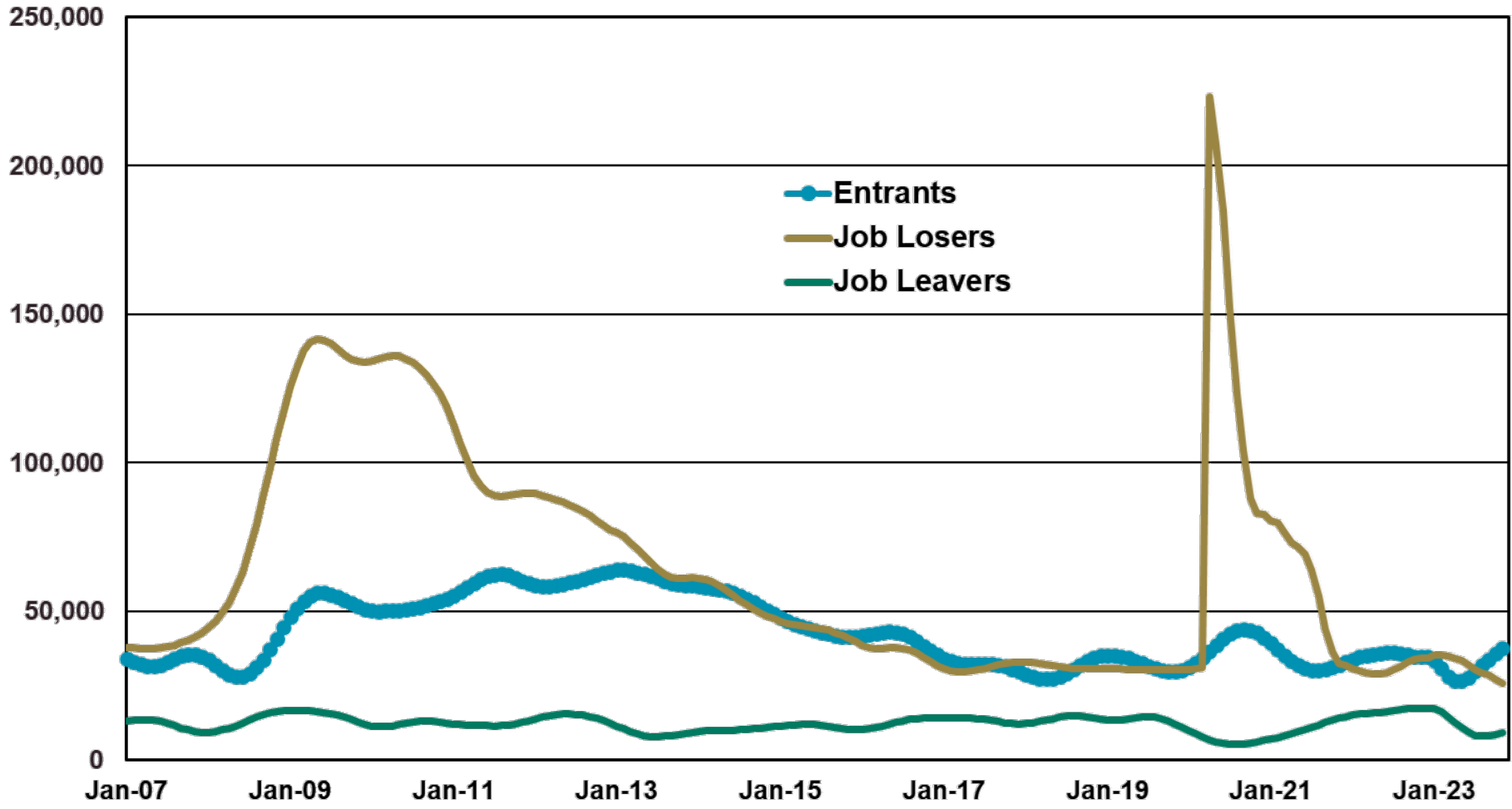
Low
Curry County
43.8%



Source: Oregon Employment Department

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



New to the workforce
27,400 (40%)

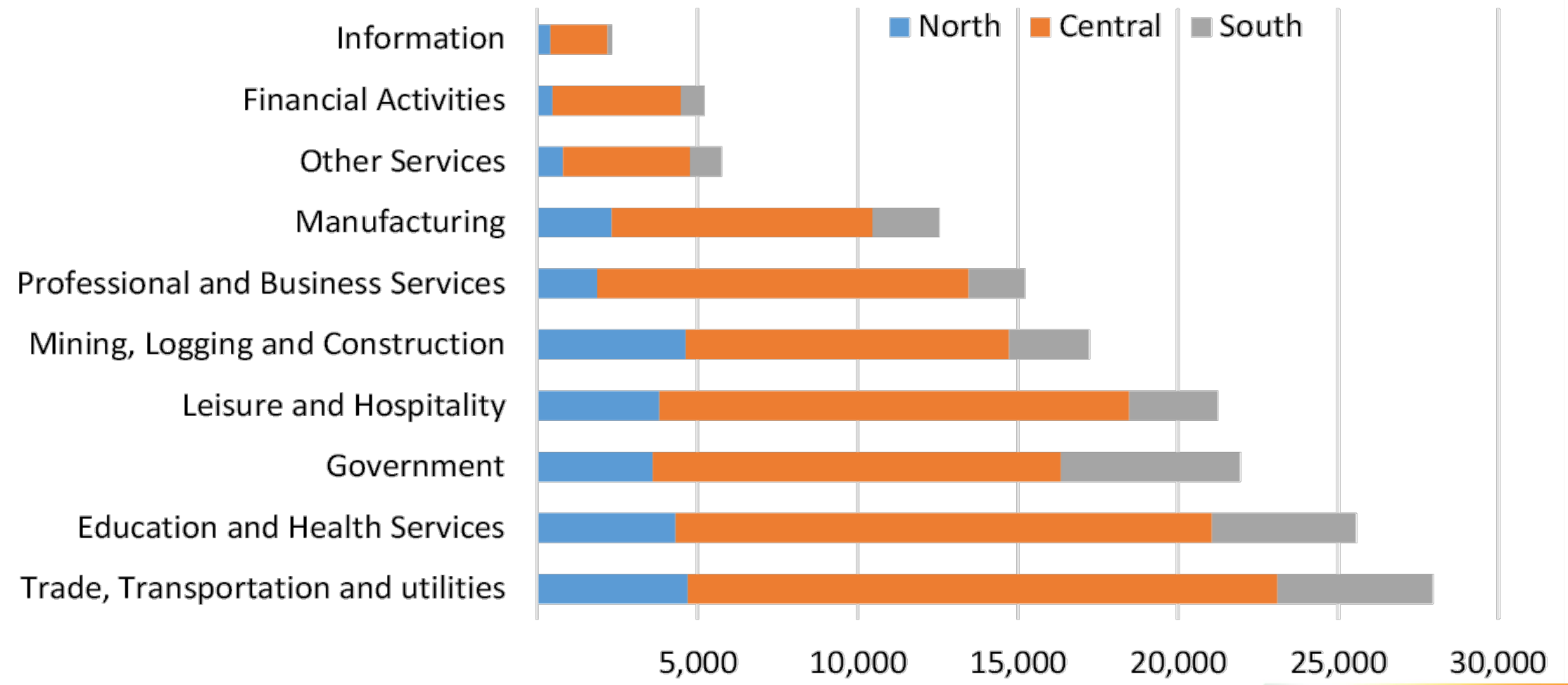
Lost job
32,300 (47%)

Left job voluntarily
9,200 (13%)

Source: Oregon Employment Department, Current Population Survey

EMPLOYMENT BY INDUSTRY

Employment by Industry, 2022 Annual



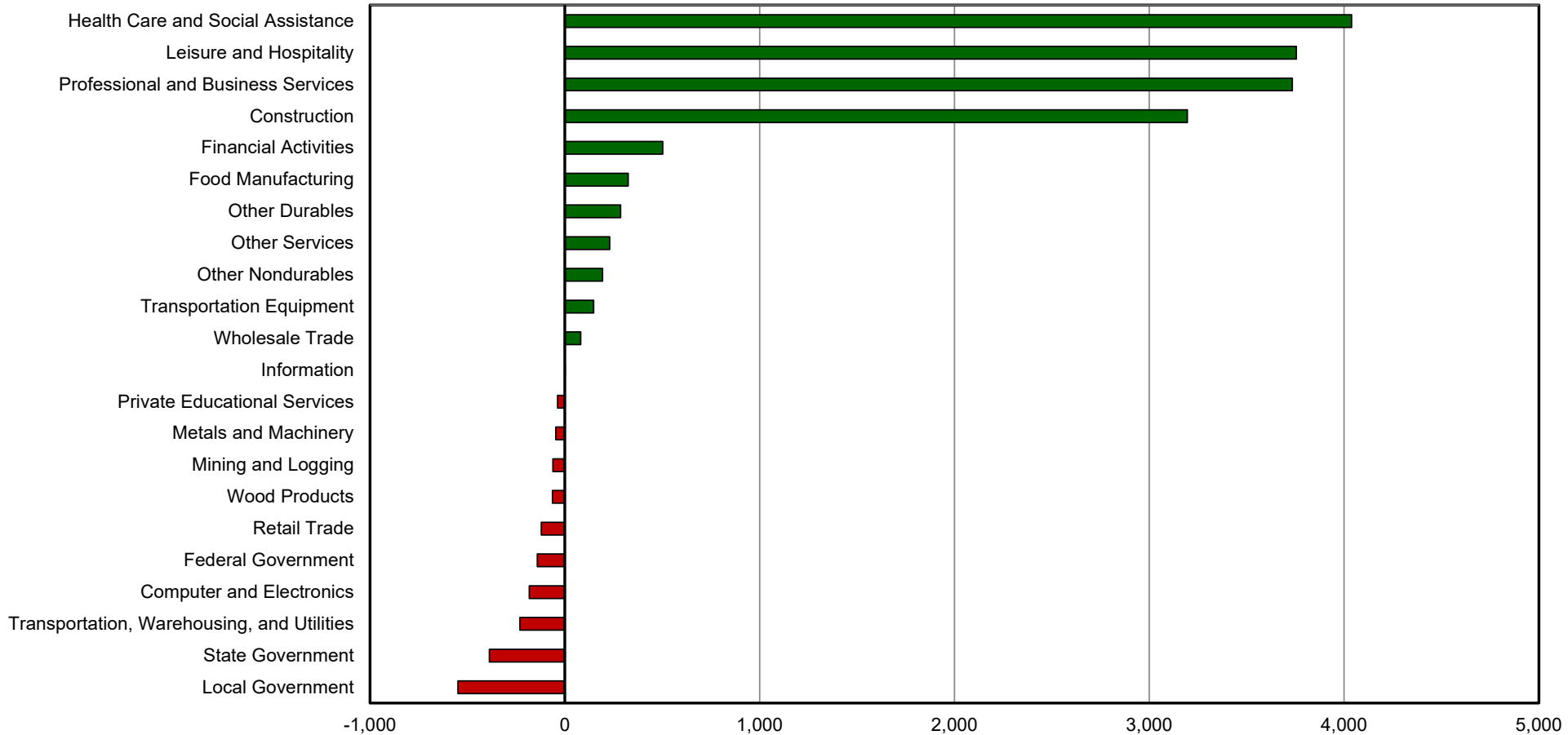
Source: Oregon Employment Department, QCEW

PROJECTED GROWTH

Quarterly Forecast from the Oregon Office of
Economic Analysis (EOA)
Industry Employment Projections, 2022-2032
Occupational Employment Projections, 2022-2032

OEA EXPECTS OREGON TO GAIN ABOUT 14,700 JOBS IN THE NEXT 12 MONTHS.

Expected Job Changes by Industry Sector Over The Year (4Q2023 - 4Q2024)



Source: Oregon Employment Department analysis using Oregon Office of Economic Analysis Forecast, December 2023

STRONG GROWTH EXPECTED IN INFORMATION & LEISURE AND HOSPITALITY

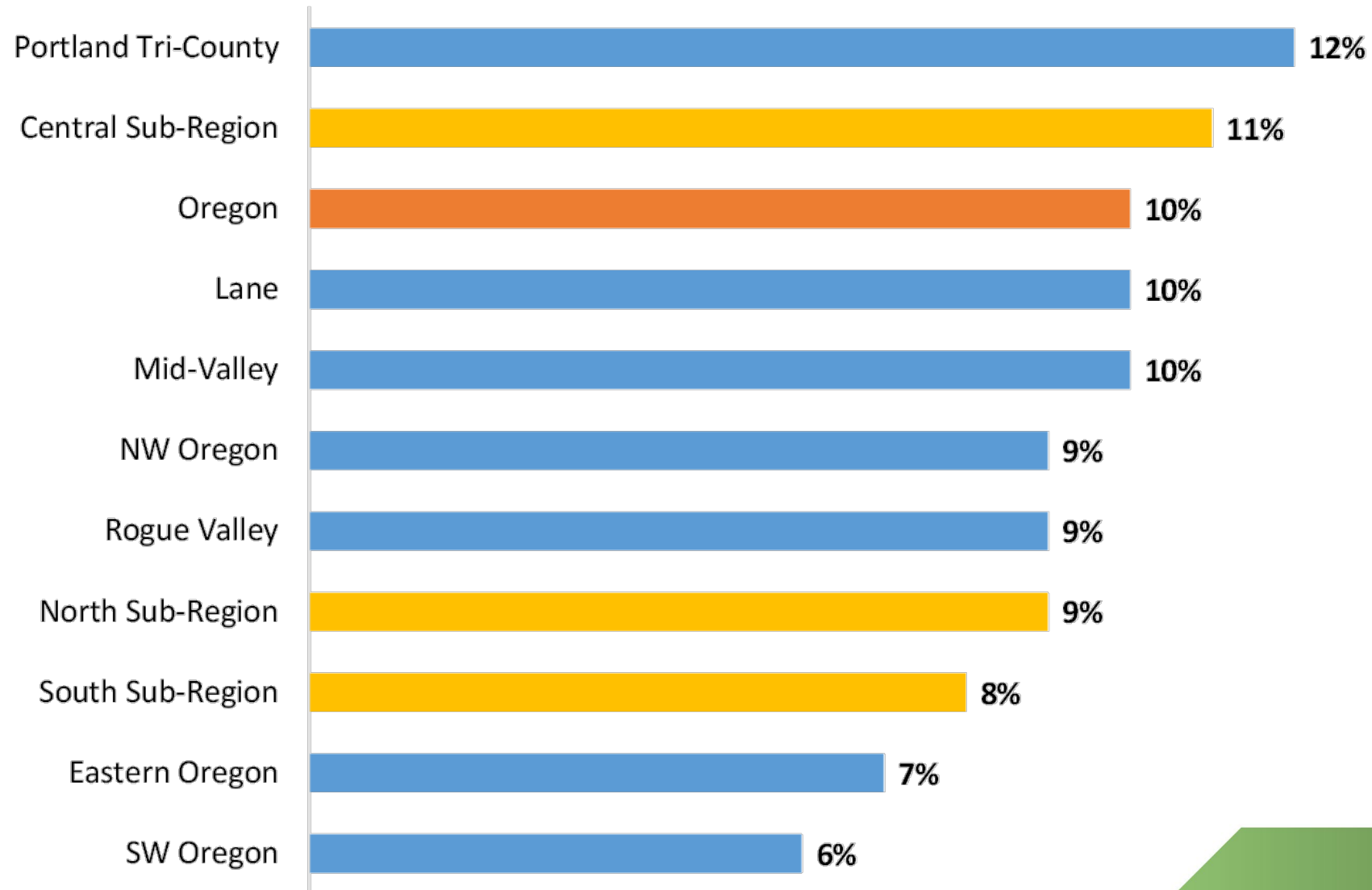
Industry Employment Projections, 2022-2032 Crook, Deschutes, Gilliam, Hood River, Jefferson, Klamath, Lake, Sherman, Wasco, and Wheeler Counties

	2022	2032	Change	% Change
Total employment	171,200	188,500	17,300	10%
Total payroll employment	159,800	176,100	16,300	10%
Total private	137,100	152,200	15,100	11%
Natural resources and mining	6,500	7,000	500	8%
Mining and logging	500	500	0	0%
Construction	11,100	12,900	1,800	16%
Manufacturing	12,700	13,600	900	7%
Durable goods	8,500	9,100	600	7%
Nondurable goods	4,200	4,500	300	7%
Trade, transportation, and utilities	28,300	29,600	1,300	5%
Wholesale trade	4,300	4,700	400	9%
Retail trade	19,800	20,300	500	3%
Transportation, warehousing, and utilities	4,200	4,700	500	12%
Information	2,900	3,400	500	17%
Financial activities	7,600	7,800	200	3%
Professional and business services	15,200	17,200	2,000	13%
Private educational and health services	25,600	29,500	3,900	15%
Health care and social assistance	23,900	27,600	3,700	15%
Leisure and hospitality	21,200	24,700	3,500	17%
Accommodation and food services	18,100	20,900	2,800	15%
Other services	6,000	6,500	500	8%
Government	22,700	23,900	1,200	5%
Federal government	2,700	2,600	-100	-4%
State government	2,400	2,600	200	8%
Local government	17,600	18,700	1,100	6%
Local government education	8,600	8,700	100	1%
Self-employment	11,400	12,400	1,000	9%

Source: Oregon Employment Department

CENTRAL OREGON IS PROJECTED TO GROW FASTER THAN THE STATE

Projected Industry Employment Growth, 2022-2023



Source: Oregon Employment Department

OCCUPATIONAL EMPLOYMENT PROJECTIONS FOR THE EAST CASCADES

Occupation Title	Employment 2022	Projected Employment 2032	Percent Change
Computer and Mathematical Occupations	2,832	3,431	21.2%
Healthcare Support Occupations	6,370	7,643	20.0%
Personal Care and Service Occupations	4,910	5,817	18.5%
Architecture and Engineering Occupations	2,231	2,603	16.7%
Construction and Extraction Occupations	10,653	12,423	16.6%
Community and Social Service Occupations	3,936	4,495	14.2%
Food Preparation and Serving Related Occupations	16,769	19,125	14.0%
Healthcare Practitioners and Technical Occupations	8,554	9,739	13.9%
Building and Grounds Cleaning and Maintenance Occupations	6,579	7,432	13.0%
Business and Financial Operations Occupations	7,141	8,044	12.6%
Arts, Design, Entertainment, Sports, and Media Occupations	2,205	2,478	12.4%
Management Occupations	13,483	15,047	11.6%
Installation, Maintenance, and Repair Occupations	7,016	7,809	11.3%
Total, All Occupations	171,035	188,397	10.2%
Protective Service Occupations	2,711	2,975	9.7%
Transportation and Material Moving Occupations	12,811	14,028	9.5%
Life, Physical, and Social Science Occupations	2,370	2,583	9.0%
Educational Instruction and Library Occupations	8,183	8,741	6.8%
Legal Occupations	929	987	6.2%
Production Occupations	9,118	9,641	5.7%
Farming, Fishing, and Forestry Occupations	4,403	4,637	5.3%
Sales and Related Occupations	17,257	17,909	3.8%
Office and Administrative Support Occupations	20,311	20,557	1.2%

Source: Oregon Employment Department

2022-2023 Projections for Childcare and Early Learning Education

Occupation Title	Columbia Gorge	Central Oregon	South Central	South Oregon
Total, All Occupations	9.0%	10.9%	8.4%	10.4%
Preschool Teachers, Except Special Education	25.4%	24.1%	30.8%	23.1%
Childcare Workers	14.5%	12.8%	16.2%	13.0%
Education and Childcare Administrators, Preschool and Daycare	12.5%	19.0%	20.0%	15.8%
Kindergarten Teachers, Except Special Education	3.4%	5.1%	0.0%	2.8%
Elementary School Teachers, Except Special Education	1.5%	5.1%	3.7%	2.5%

2023 Annual Mean (Average)

Occupation Title	Columbia Gorge	Central Oregon	South Central	South Oregon
Total, All Occupations	\$55,911	\$59,620	\$54,505	\$64,835
Elementary School Teachers, Except Special Education	-s-	\$79,890	\$66,940	\$82,984
Kindergarten Teachers, Except Special Education	-s-	\$70,144	\$72,542	\$83,441
Education and Childcare Administrators, Preschool and Daycare	\$48,999	\$49,102	\$44,893	\$50,496
Preschool Teachers, Except Special Education	\$41,048	\$38,250	\$39,436	\$39,184
Childcare Workers	\$36,393	\$34,362	\$31,024	\$36,170

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!

Nicole S. Ramos, Regional Economist

nicole.s.ramos@employ.oregon.gov

Sign up for the latest workforce and economic research:

www.qualityinfo.org/subscribe

Follow us on Twitter [@OED_Research](https://twitter.com/OED_Research)