

# Job Growth in Health Care and Future Workforce Needs

Health Care Workforce Committee

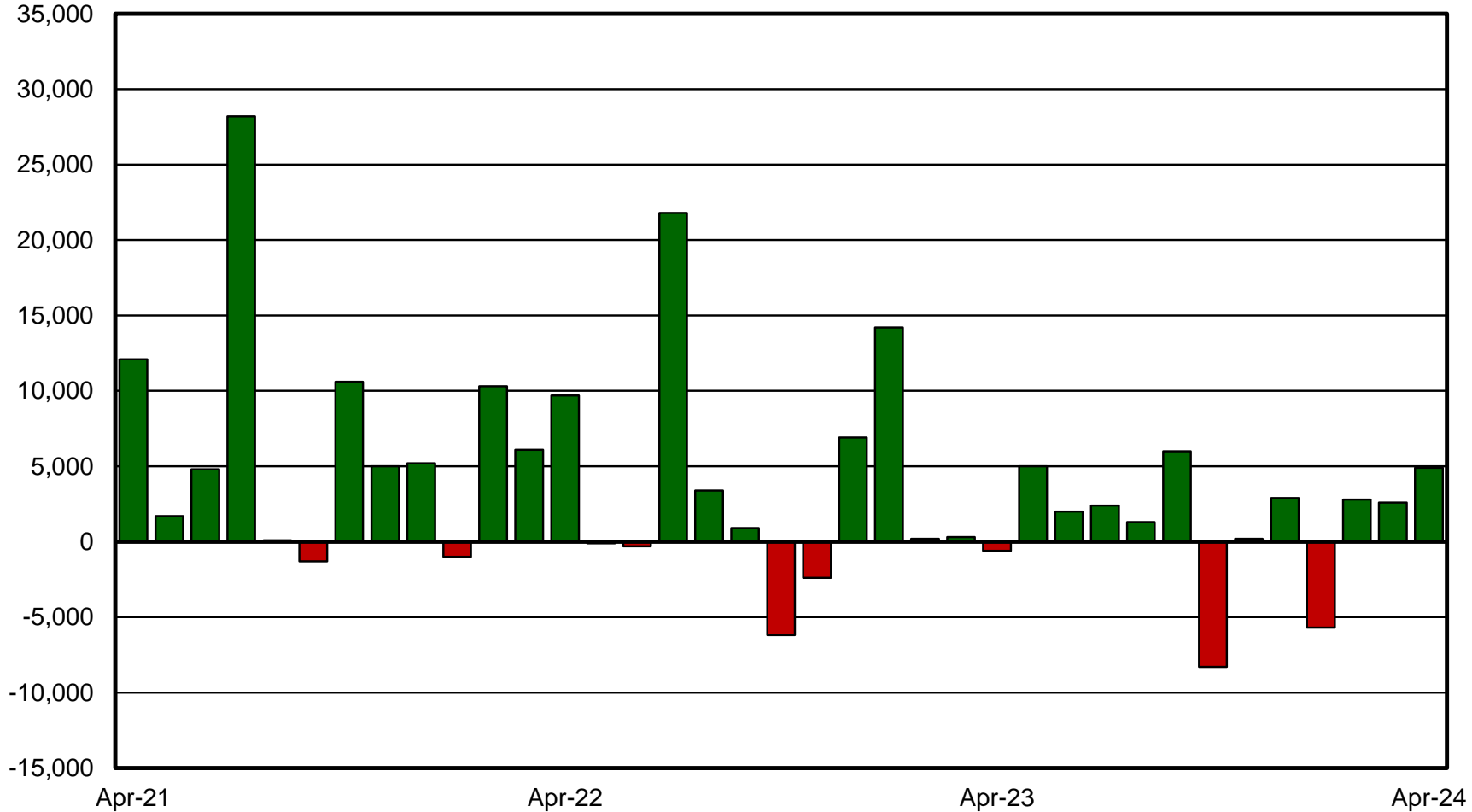
June 12, 2024

# UNEMPLOYMENT

Local Area Unemployment Statistics (LAUS)  
and Current Population Survey (CPS)

# OREGON EMPLOYERS ADDED 4,900 JOBS IN APRIL.

## Oregon's Monthly Job Change Seasonally Adjusted



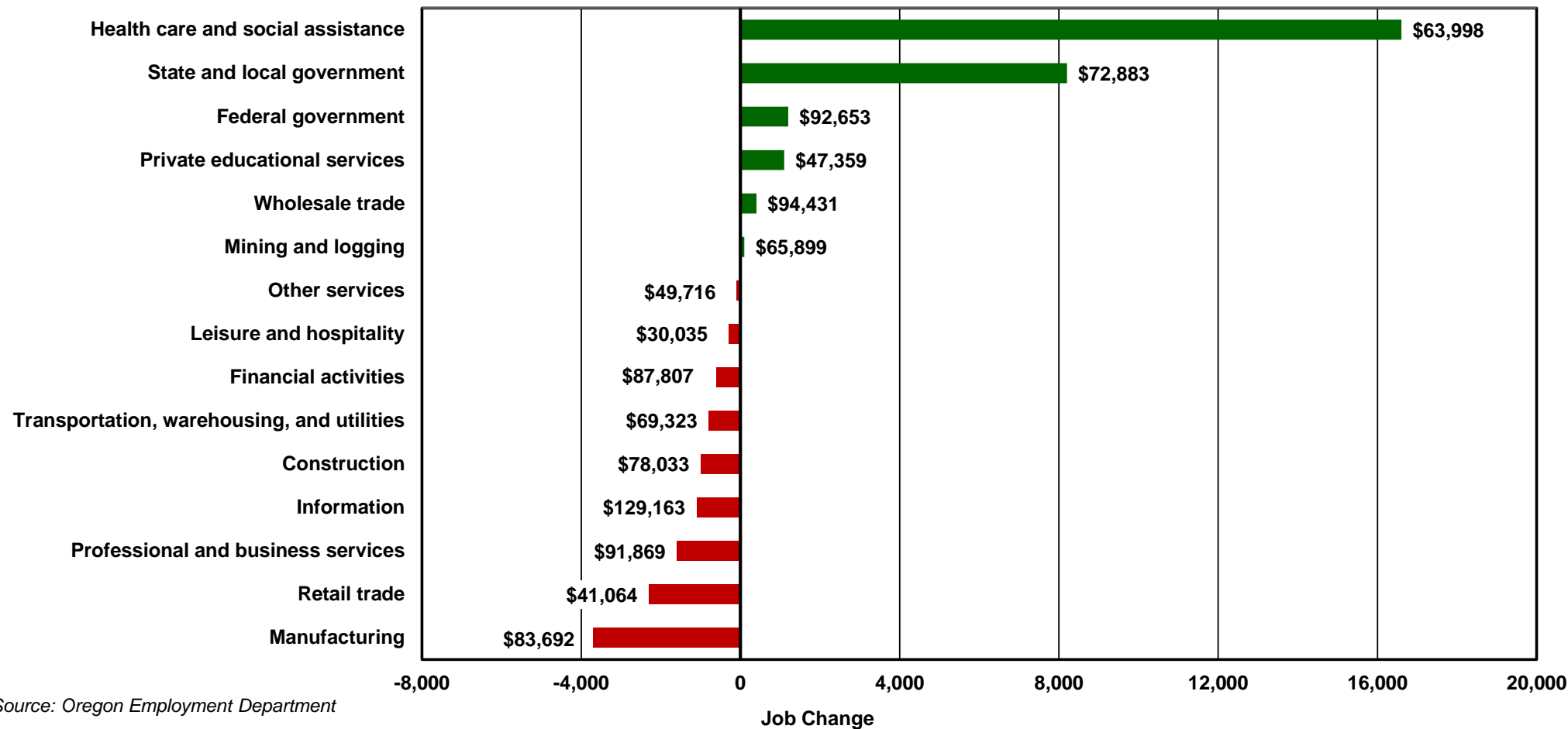
Source: Oregon Employment Department, Current Employment Statistics

Job growth has slowed in Oregon over the past year. Monthly gains averaged 1,200 jobs so far in 2024.

Oregon has relatively slow job growth among all states.

# MANY BROAD SECTORS OF OREGON'S ECONOMY HAVE LOST JOBS OVER THE PAST YEAR.

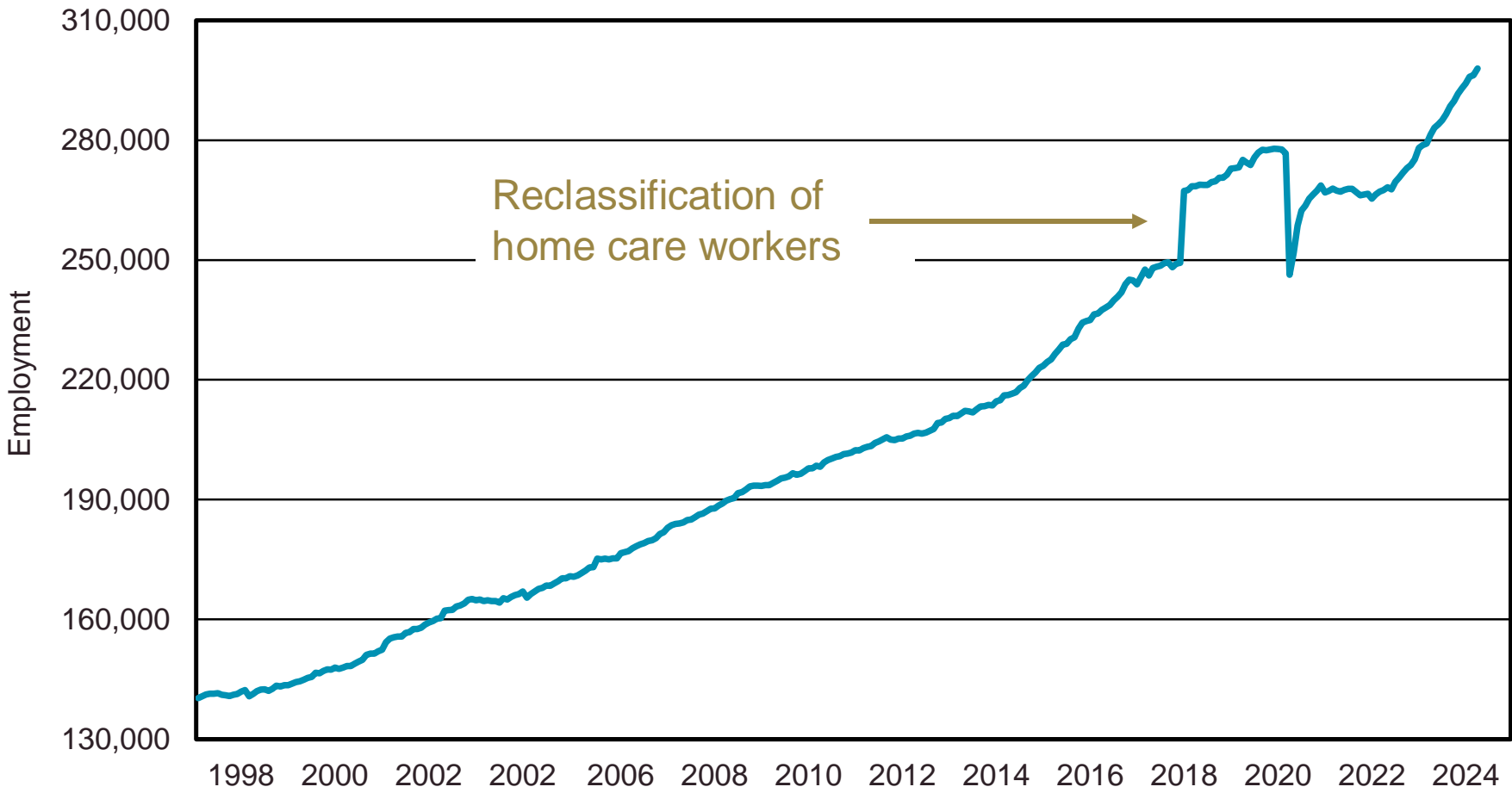
## Oregon Job Change and Average Pay by Industry April 2023 - April 2024 Job Change, 2023 Average Pay



Source: Oregon Employment Department

# PRIVATE HEALTH CARE AND SOCIAL ASSISTANCE GAINED 1,700 JOBS IN APRIL.

## Seasonally Adjusted Employment in Oregon Private Health Care and Social Assistance: 1997 - 2024



*Over the year (not seasonally adjusted):*

Ambulatory:  
+2,800

Hospitals:  
+2,900

Nursing and residential:  
+3,300

Social assistance:  
+7,500

Source: Oregon Employment Department, Current Employment Statistics

# OREGON BUSINESSES REPORTED 60,300 VACANCIES IN WINTER 2024.

## Oregon Job Vacancies, Winter 2024

<b>Vacancies</b>	<b>60,282</b>
Average Hourly Wage	\$23.32
Full-time Positions	78%
Permanent Positions	93%
Requiring Education Beyond High School	38%
Requiring Previous Experience	63%
Difficult to Fill	58%

Source: Oregon Employment Department

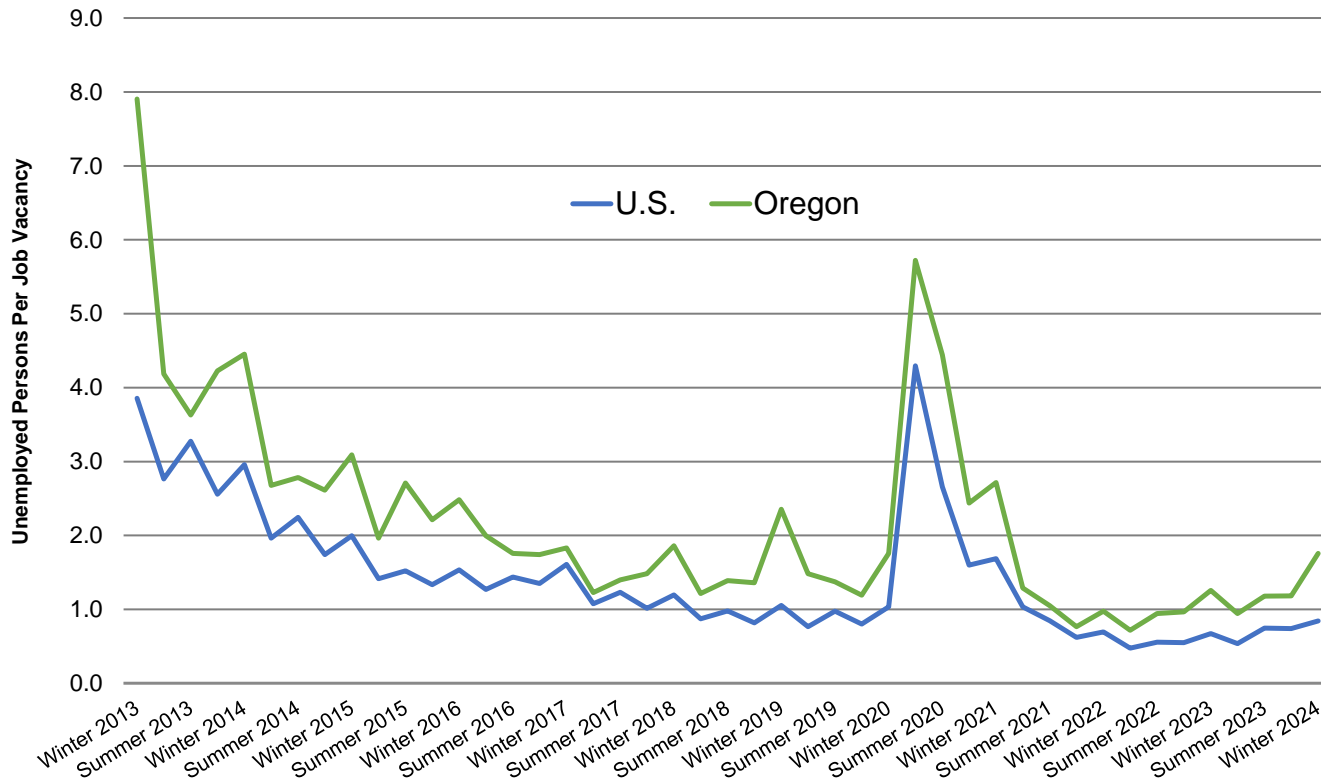
Oregon businesses reported 60,300 vacancies in winter 2024. Vacancies decreased 4% from the fall and decreased 20% from winter 2023. Employers reported difficulty filling 58% of winter 2024 vacancies.

The average starting wage among this group of vacancies was around \$23.32 per hour, an inflation-adjusted decrease of 7% from winter 2023, and a 9% decrease from fall 2023.

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

# AS UNEMPLOYMENT INCREASED AND VACANCIES DROPPED IN THE WINTER, 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

The U.S. ratio was 0.8 in January 2024, its 11th straight quarter below 1. It reached 4.3 in April 2020 after several years around 1-to-1.

Oregon had 1.8 unemployed per job vacancy in winter 2024, still much lower than the peak of 5.7 in May 2020.

# BUSINESSES REPORTED HIRING IN VARIOUS INDUSTRIES.

## Oregon Job Vacancies by Industry, Winter 2024

<b>Industry</b>	<b>Vacancies</b>
<b>All Industries</b>	<b>60,282</b>
Health care and social assistance	18,820
Leisure and hospitality	8,511
Management, administrative, and waste services	4,984
Manufacturing	4,908
Retail trade	4,578
Other services	4,577
Professional, scientific, and technical services	3,626
Construction	3,060
Financial activities	1,595
Transportation, warehousing, and utilities	1,343
Wholesale trade	1,332
Private educational services	824
Information	627
Natural resources and mining	626

Source: Oregon Employment Department

Health care and social assistance had the most vacancies of any industry, with 18,800.

Health care and social assistance alone accounted for almost one-third of all job openings.



# OEA EXPECTS OREGON TO GAIN ABOUT 22,100 JOBS IN THE NEXT 12 MONTHS.

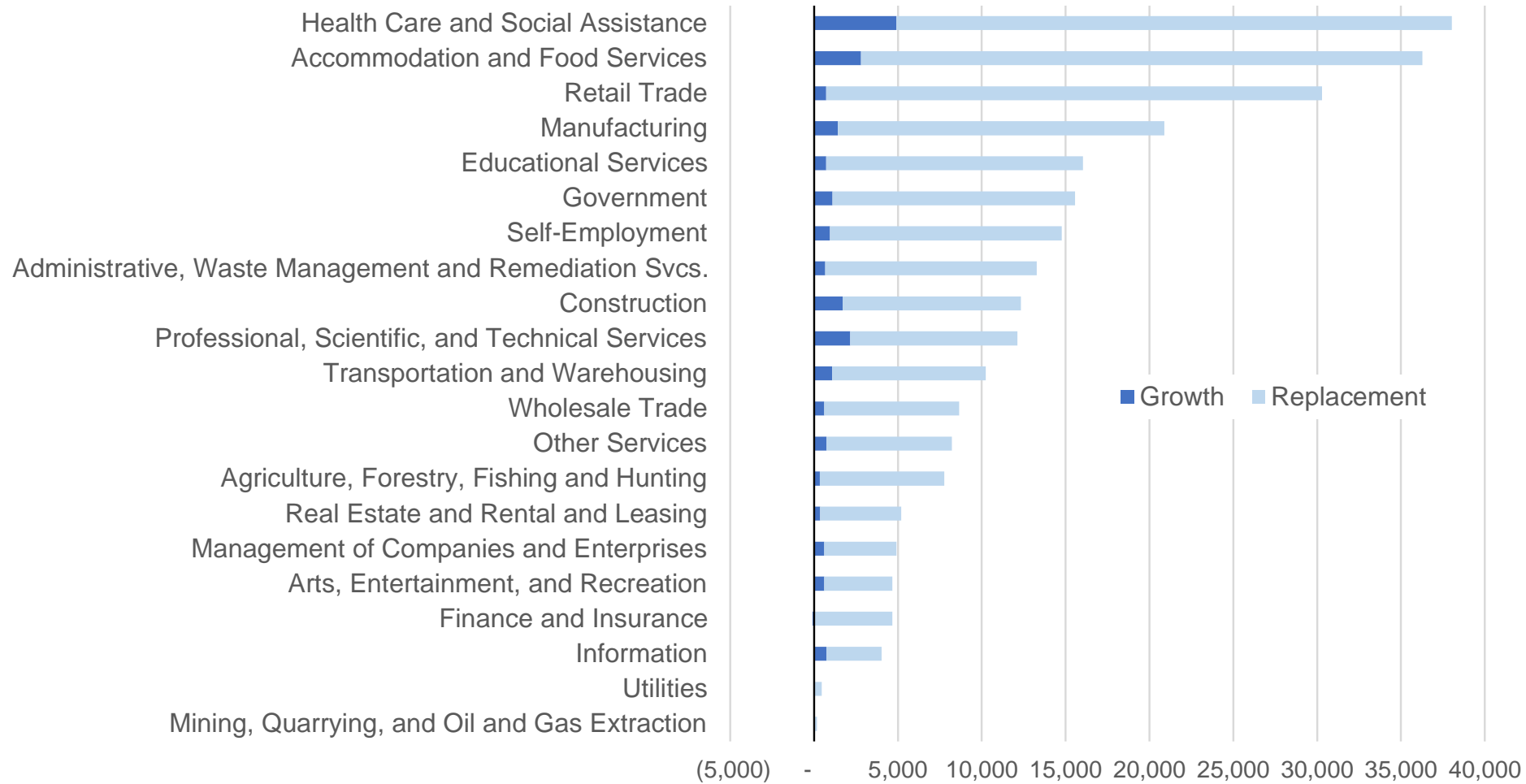
## Top Occupations in Oregon With the Highest Number of Vacancies Reported as Difficult to Fill, 2023

Occupation	Vacancies	Difficult to Fill	Share of Total
<b>All Occupations</b>	<b>72,815</b>	<b>44,232</b>	<b>61%</b>
Personal Care Aides	2,700	1,662	62%
Registered Nurses	1,643	1,382	84%
Nursing Assistants	1,731	1,005	58%
Medical Assistants	933	674	72%
Dental Assistants	608	581	96%
Mental Health Counselors	925	488	53%
Dental Hygienists	416	416	100%
Social and Human Service Assistants	1,200	353	29%
Physical Therapists	292	292	100%
Rehabilitation Counselors	321	289	90%
Nurse Practitioners	248	248	100%
Medical and Health Services Managers	403	248	62%
Family Medicine Physicians	206	206	100%

Source: Oregon Employment Department

# HEALTH CARE PROJECTED TO ADD THE MOST JOBS BY 2032

## 2022-2032 Projected Annual Openings by Industry in Oregon



# FACTORS THAT COULD AFFECT FUTURE TRENDS: AGING WORKFORCE

## Workers Ages 55+ Likely Within a Decade of Retirement

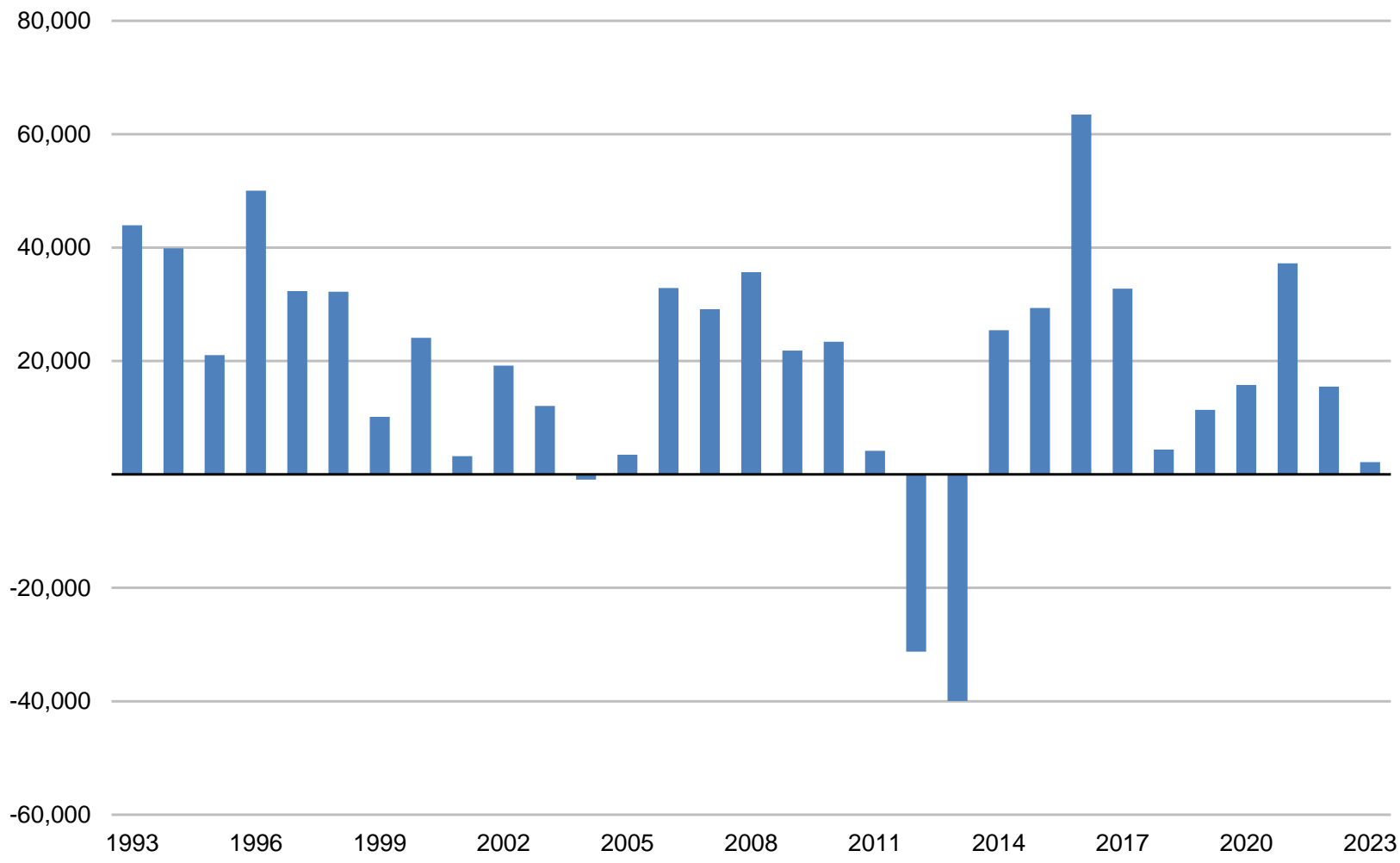
Oregon Jobs in 2022	All Workers	Age 55+	% Age 55+
<b>All Sectors</b>	<b>1,908,164</b>	<b>455,792</b>	<b>24%</b>
Agriculture, Forestry, Fishing and Hunting	52,269	17,026	33%
Mining, Quarrying, and Oil and Gas Extraction	1,787	574	32%
Real Estate and Rental and Leasing	30,756	8,795	29%
Utilities	8,025	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%

About one in four jobs in Oregon is held by a worker at least 55 years old.

Health care and social assistance has the largest number of workers ages 55+, who may be looking towards retirement in the coming decade.

# OEА EXPECTS OREGON TO GAIN ABOUT 22,100 JOBS IN THE NEXT 12 MONTHS.

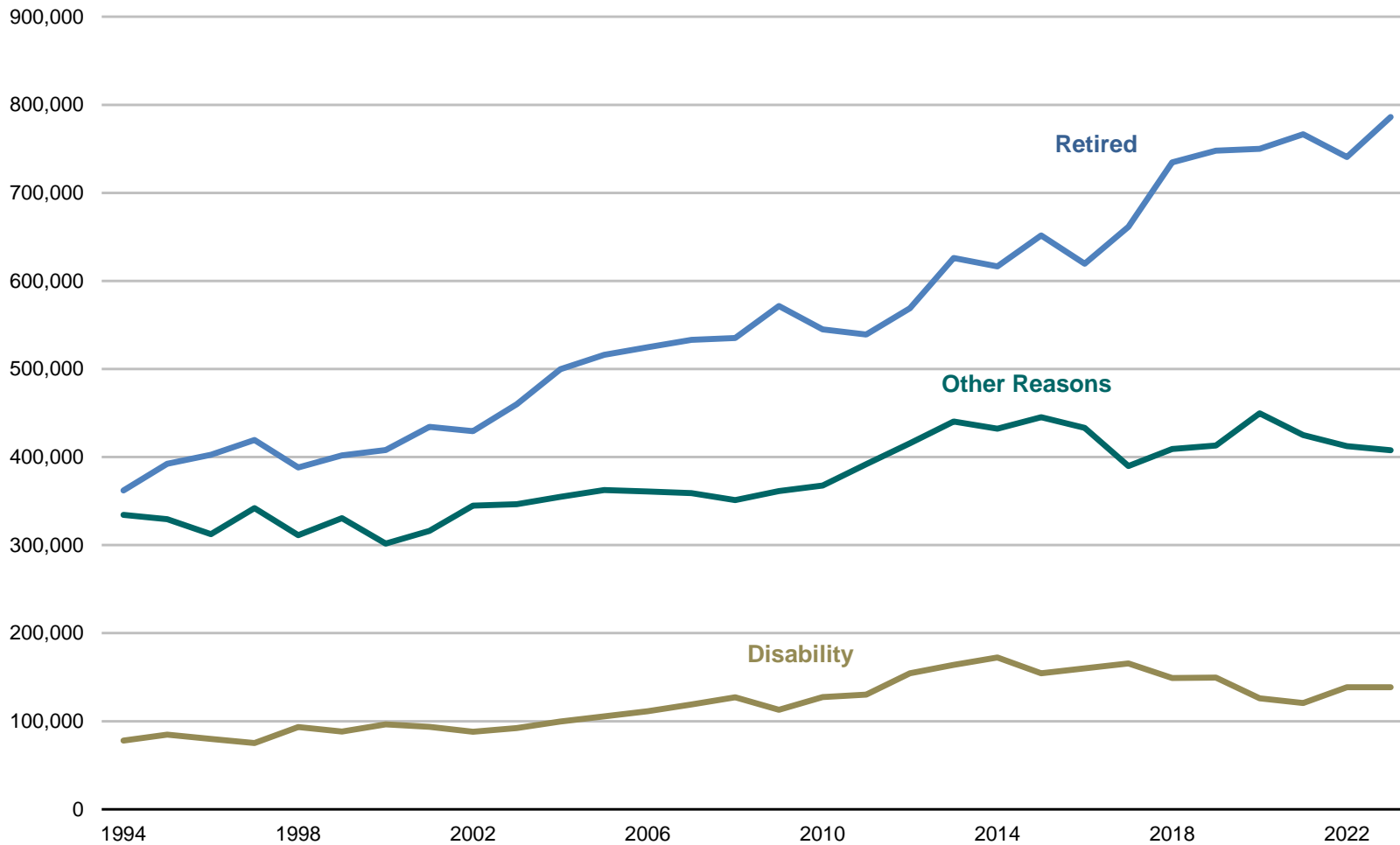
## Annual Labor Force Change in Oregon, 1993 - 2023



Source: Oregon Employment Department, Local Area Unemployment Statistics

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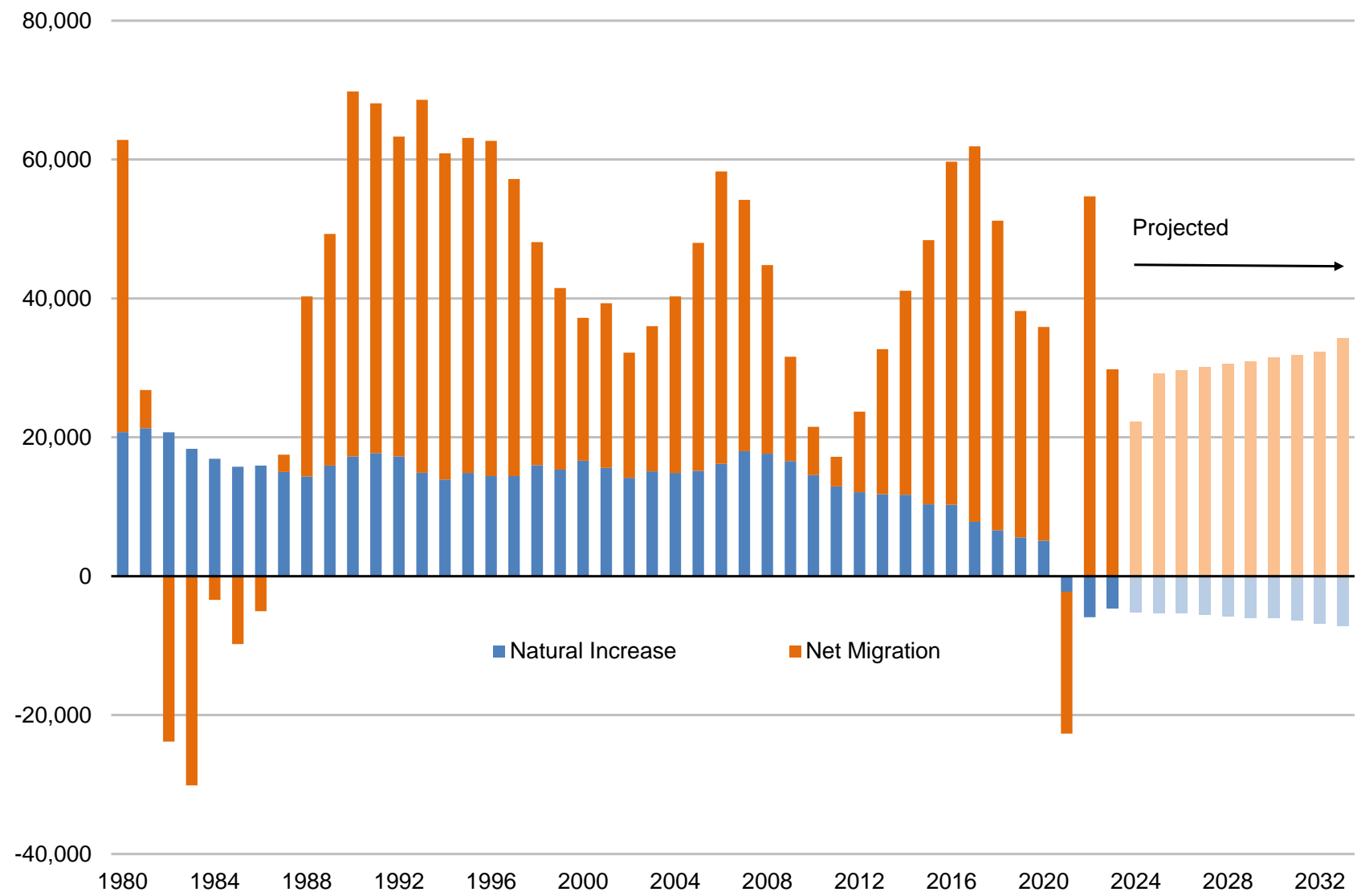
## Reasons Oregonians Ages 16+ are Not in Labor Force Annual Average, 1994-2023



Source: Oregon Employment Department, Local Area Unemployment Statistics

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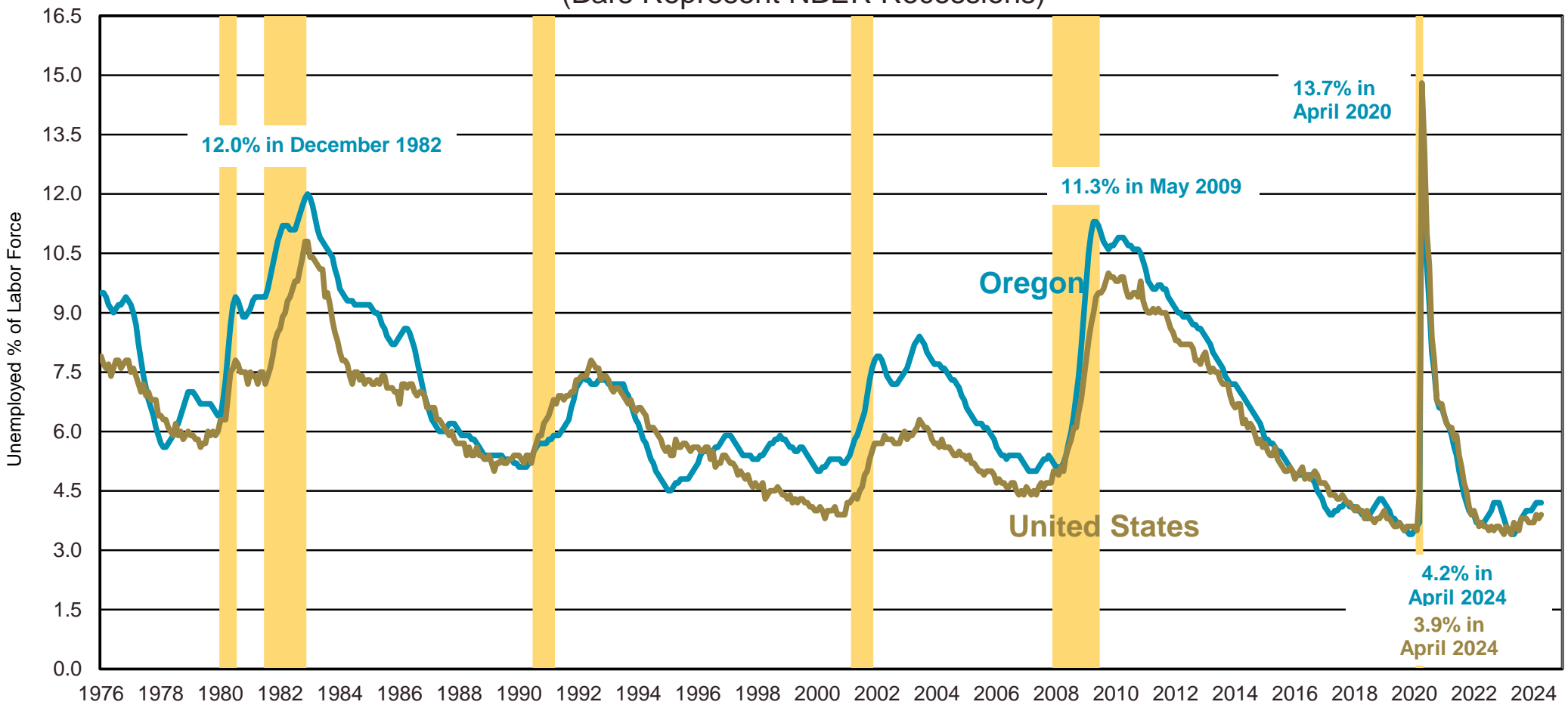
## Oregon's Population Components of Change



Source: Oregon Employment Department, Oregon Office of Economic Analysis

# OREGON'S UNEMPLOYMENT RATE WAS 4.2% IN APRIL.

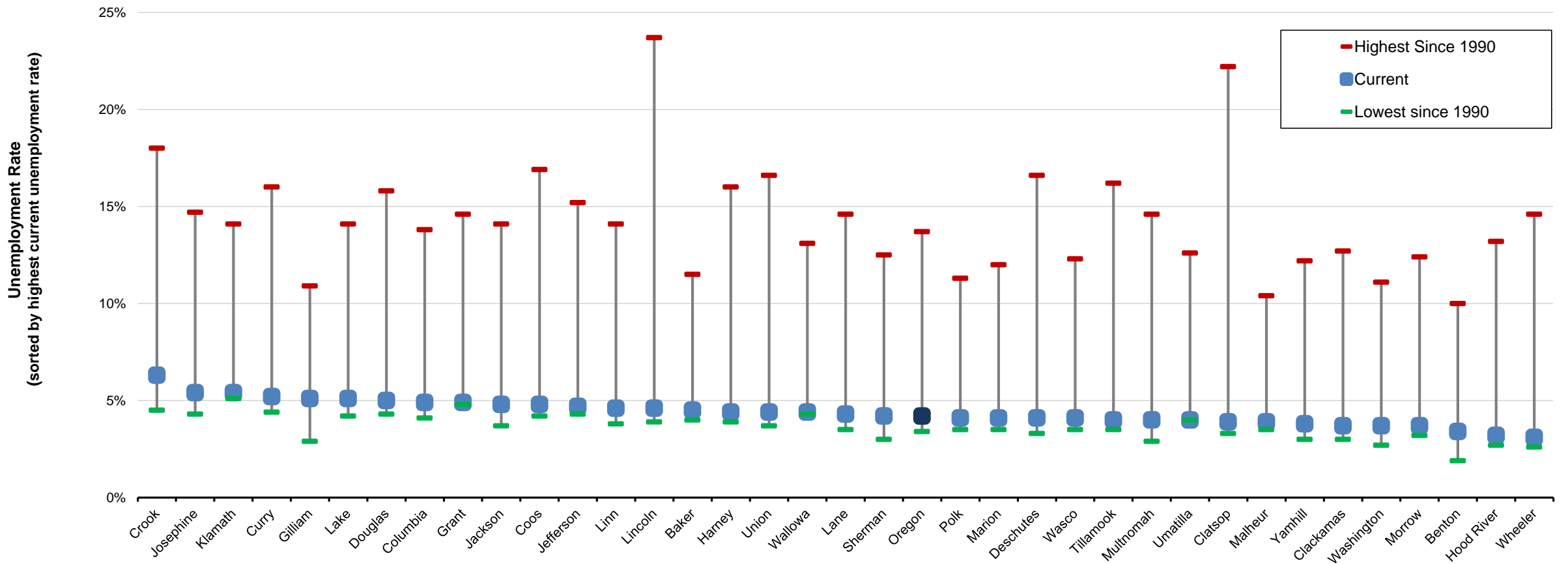
## Oregon's Unemployment Rate Was 4.2% in April 2024 (Bars Represent NBER Recessions)



Source: Oregon Employment Department and National Bureau of Economic Research

## Unemployment Rates in Oregon Counties

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

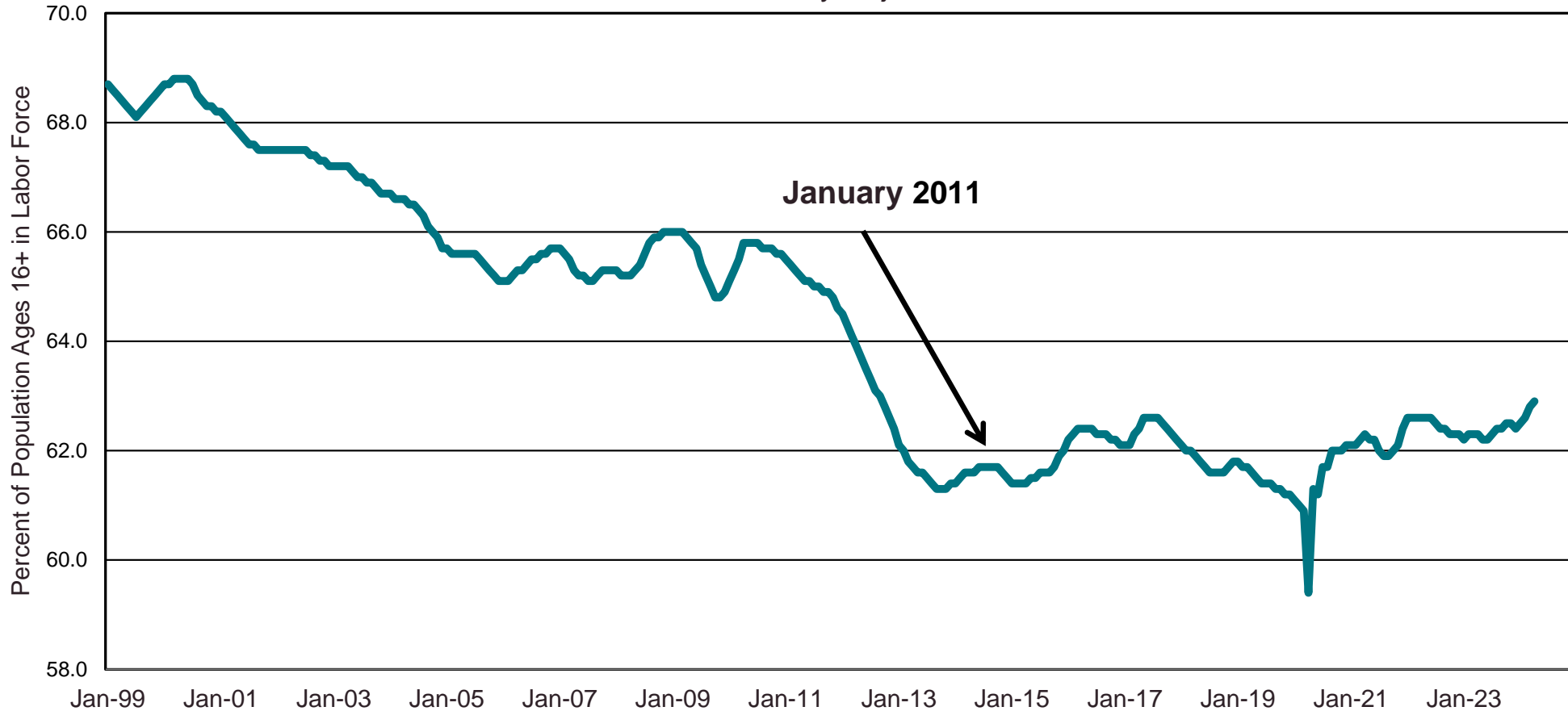


Source: Oregon Employment Department, Local Area Unemployment Statistics



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

## Oregon's Labor Force Participation Rate Seasonally Adjusted

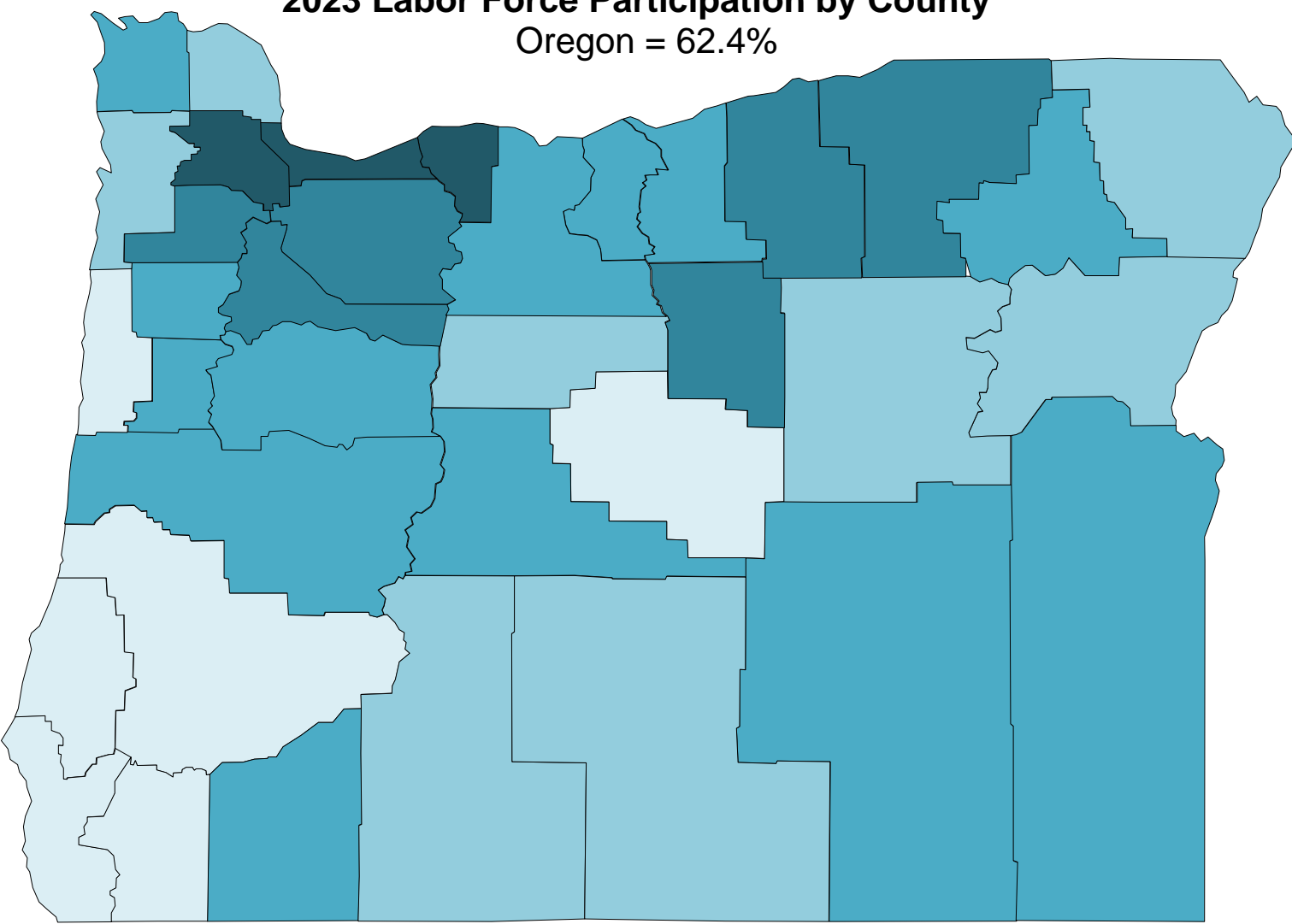


Source: Oregon Employment Department, Local Area Unemployment Statistics

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

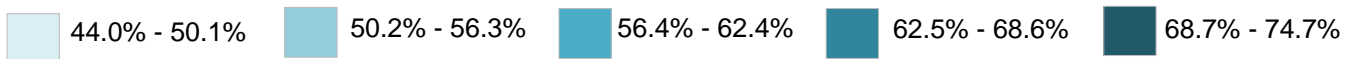
## 2023 Labor Force Participation by County

Oregon = 62.4%



**High**  
Hood River County  
74.7%

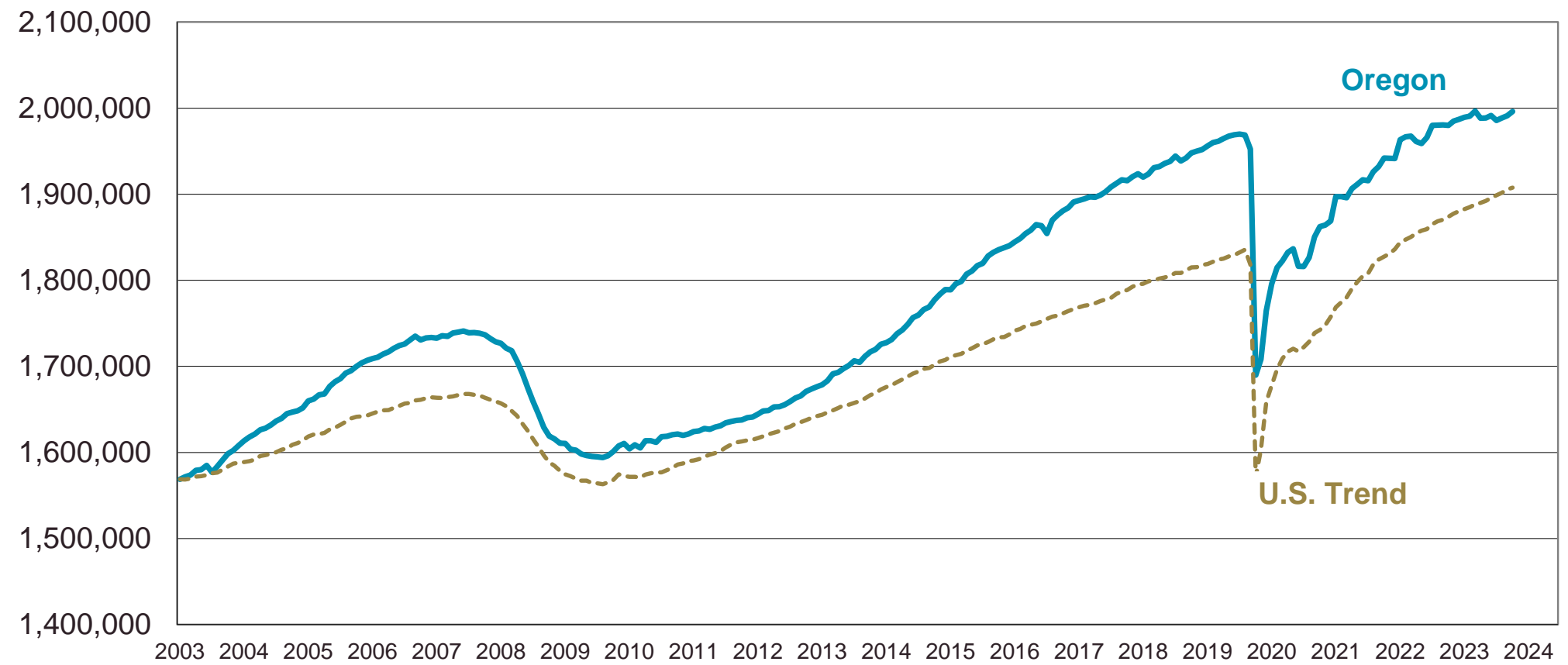
**Low**  
Curry County  
44.0%



Source: Oregon Employment Department

WE'VE TENDED TO GROW FASTER THAN THE U.S. DURING GOOD ECONOMIC TIMES...

### Oregon and U.S. Employment Trends\* 2003 to Current: U.S. Trend Indexed to July 2003

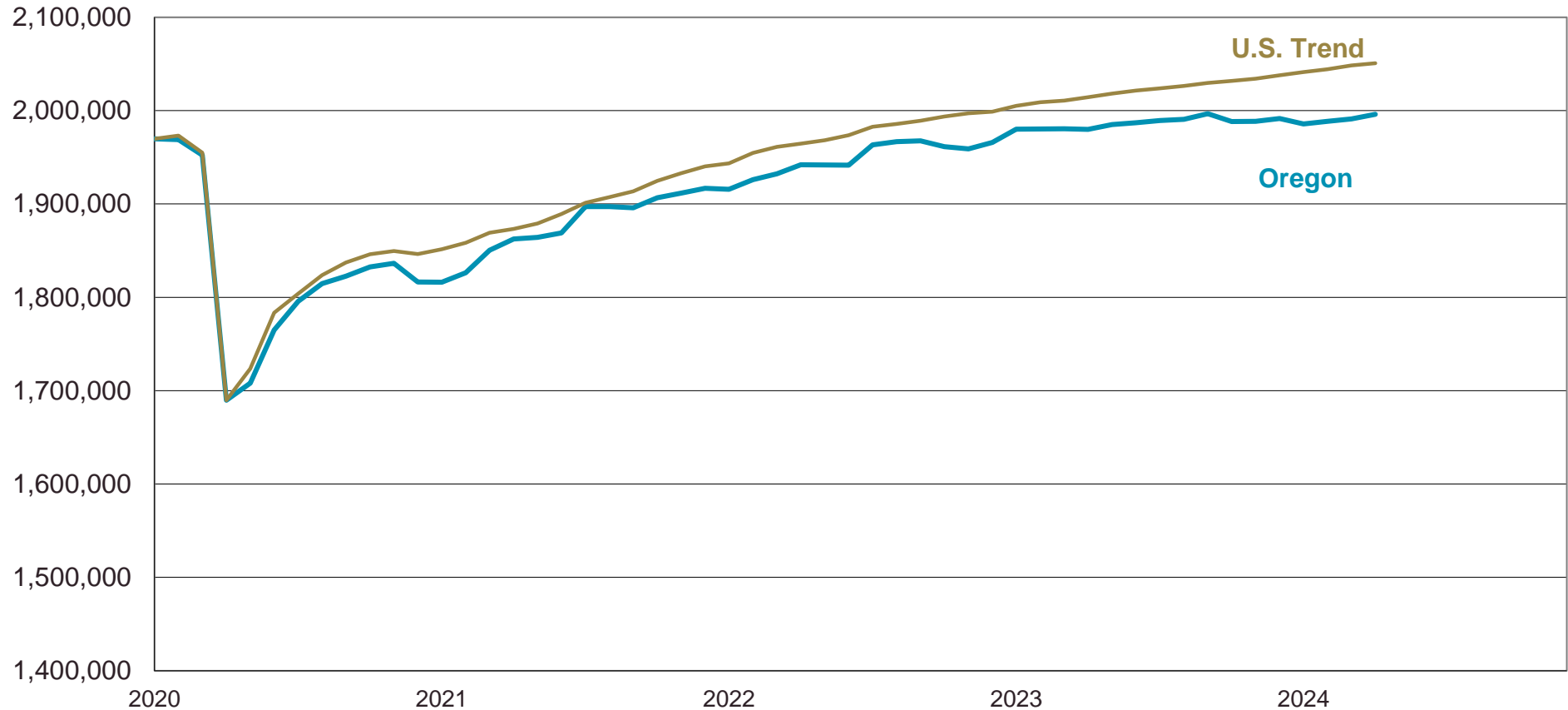


Source: Oregon Employment Department, Current Employment Statistics

\* Seasonally Adjusted

# THE U.S. AND OREGON HAVE MORE JOBS NOW THAN BEFORE THE PANDEMIC RECESSION.

## Oregon and U.S. Employment Trends\* January 2020 to Current: U.S. Trend Indexed to January 2020



Source: Oregon Employment Department, Current Employment Statistics

\* Seasonally Adjusted

# OVER 2.6 MILLION JOB OPENINGS PROJECTED IN OREGON

BETWEEN  
**2022 and 2032**

**221,000**

JOB OPENINGS FROM  
INDUSTRY GROWTH

**2,470,000**

JOB OPENINGS FROM  
REPLACEMENT OPENINGS

Occupational employment projections give us a chance to see what type of careers will be in demand over the next decade.

# CHANGES IN TECHNOLOGY AND PATIENT CARING DRIVING FASTEST GROWING OCCUPATIONS.

## Oregon Employment Projected to Grow 10.4% between 2022 and 2032

### Fastest Growing Health Care Practitioner and Health Care Support Occupations

Occupation Title	Employment 2022	Projected Employment 2032	Employment Change	Percent Change
Nurse Practitioners	2,244	3,424	1,180	52.6%
Physical Therapist Assistants	836	1,155	319	38.2%
Physician Assistants	1,419	1,934	515	36.3%
Veterinary Assistants and Laboratory Animal Caretakers	2,745	3,620	875	31.9%
Veterinarians	1,898	2,485	587	30.9%
Veterinary Technologists and Technicians	1,451	1,897	446	30.7%
Speech-Language Pathologists	1,959	2,492	533	27.2%
Orthotists and Prosthetists	135	169	34	25.2%
Home Health and Personal Care Aides	36,897	46,165	9,268	25.1%
Physical Therapists	3,106	3,847	741	23.9%
Nurse Anesthetists	384	473	89	23.2%
Massage Therapists	2,282	2,800	518	22.7%
Medical Assistants	11,955	14,523	2,568	21.5%

Changes in the delivery of services, and who provides those services are projected to increase the demand for careers like nurse practitioners.

# EMPLOYMENT IN SOCIAL SERVICE AND BEHAVIORAL HEALTH CAREERS EXPECTED TO GROW OVER THE DECADE.

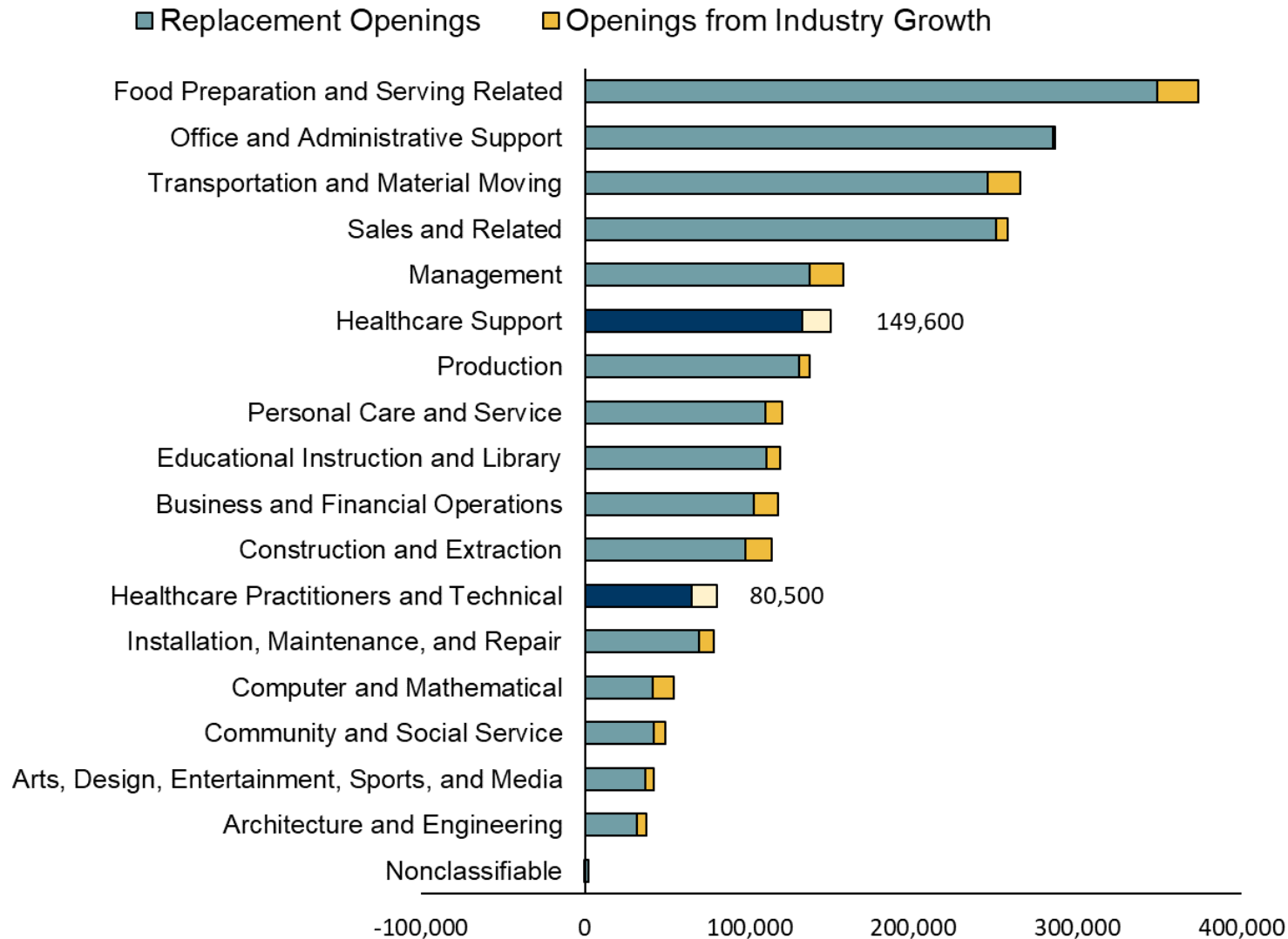
## Oregon Employment Projected to Grow 10.4% between 2022 and 2032

### Social Service and Behavioral Health Occupations Growing Faster Than Statewide Average

Occupation Title	Employment 2022	Projected Employment 2032	Employment Change	Percent Change
Community and Social Service Occupations	46,174	53,344	7,170	15.5%
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	7,487	9,541	2,054	27.4%
Community Health Workers	996	1,188	192	19.3%
Rehabilitation Counselors	3,998	4,754	756	18.9%
Mental Health and Substance Abuse Social Workers	2,103	2,436	333	15.8%
Community and Social Service Specialists, All Other	2,065	2,376	311	15.1%
Health Education Specialists	749	856	107	14.3%
Healthcare Social Workers	1,984	2,261	277	14.0%
Social Workers, All Other	3,071	3,469	398	13.0%
Social and Human Service Assistants	6,611	7,469	858	13.0%
Child, Family, and School Social Workers	5,190	5,853	663	12.8%
Probation Officers and Correctional Treatment Specialists	2,230	2,476	246	11.0%
Educational, Guidance, and Career Counselors and Advisors	2,688	2,878	190	7.1%

# INDUSTRY GROWTH IS ONLY A SMALL PART OF FUTURE WORKFORCE DEMAND.

## Job Openings Projected in Every Major Occupation Group



Industry growth only accounts for a small portion of projected job openings.

We must account for openings that arise when people retire and exit the workforce. We also have to account for workers who change careers and transfer to other occupations.

**230,000+**

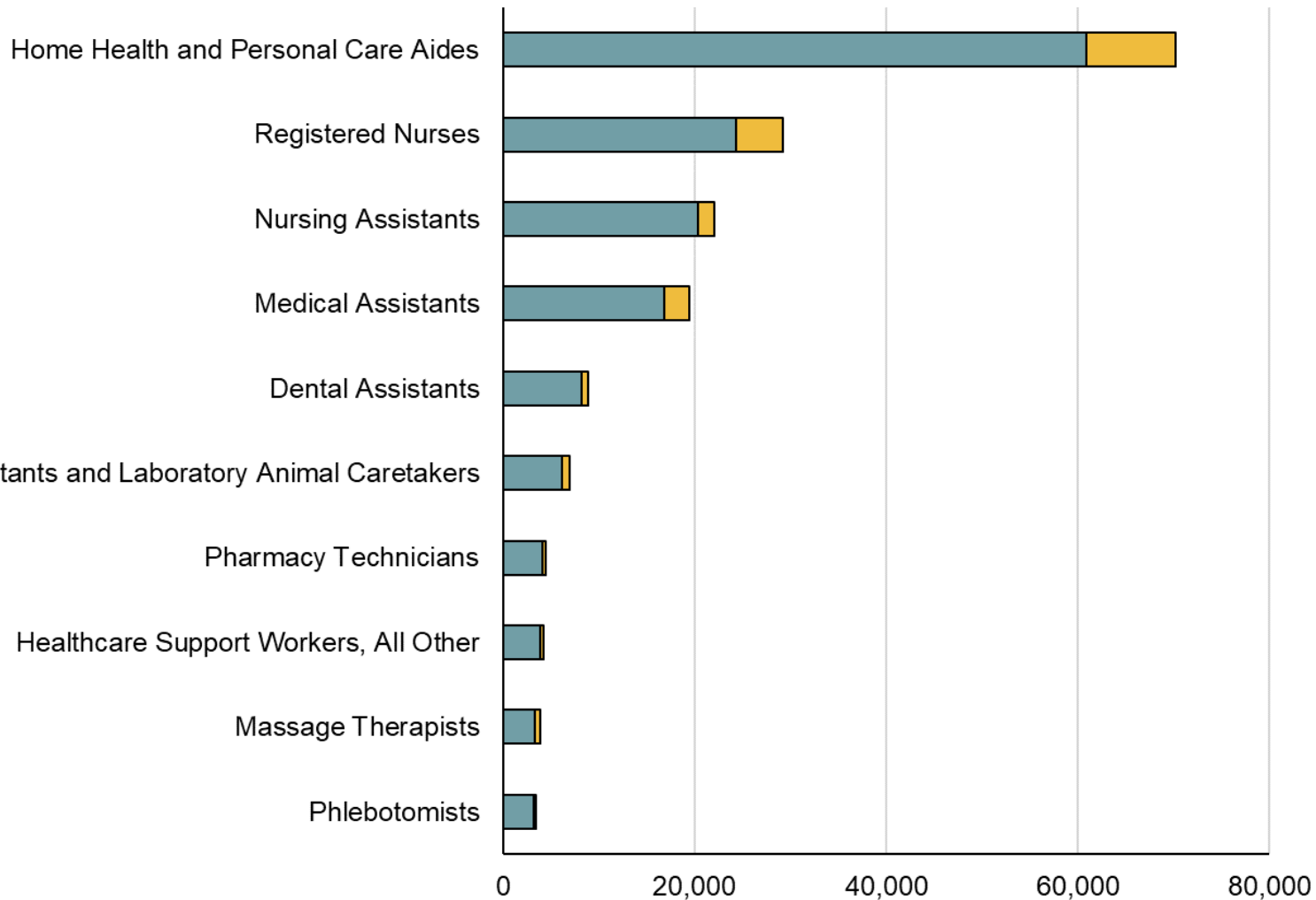
Projected job openings in health care practitioner and support occupations.



# MANY OPENINGS PROJECTED FOR CAREERS IN HOME HEALTH AND NURSING.

## Healthcare Occupations With Most Openings

■ Replacement Openings ■ Employment Change

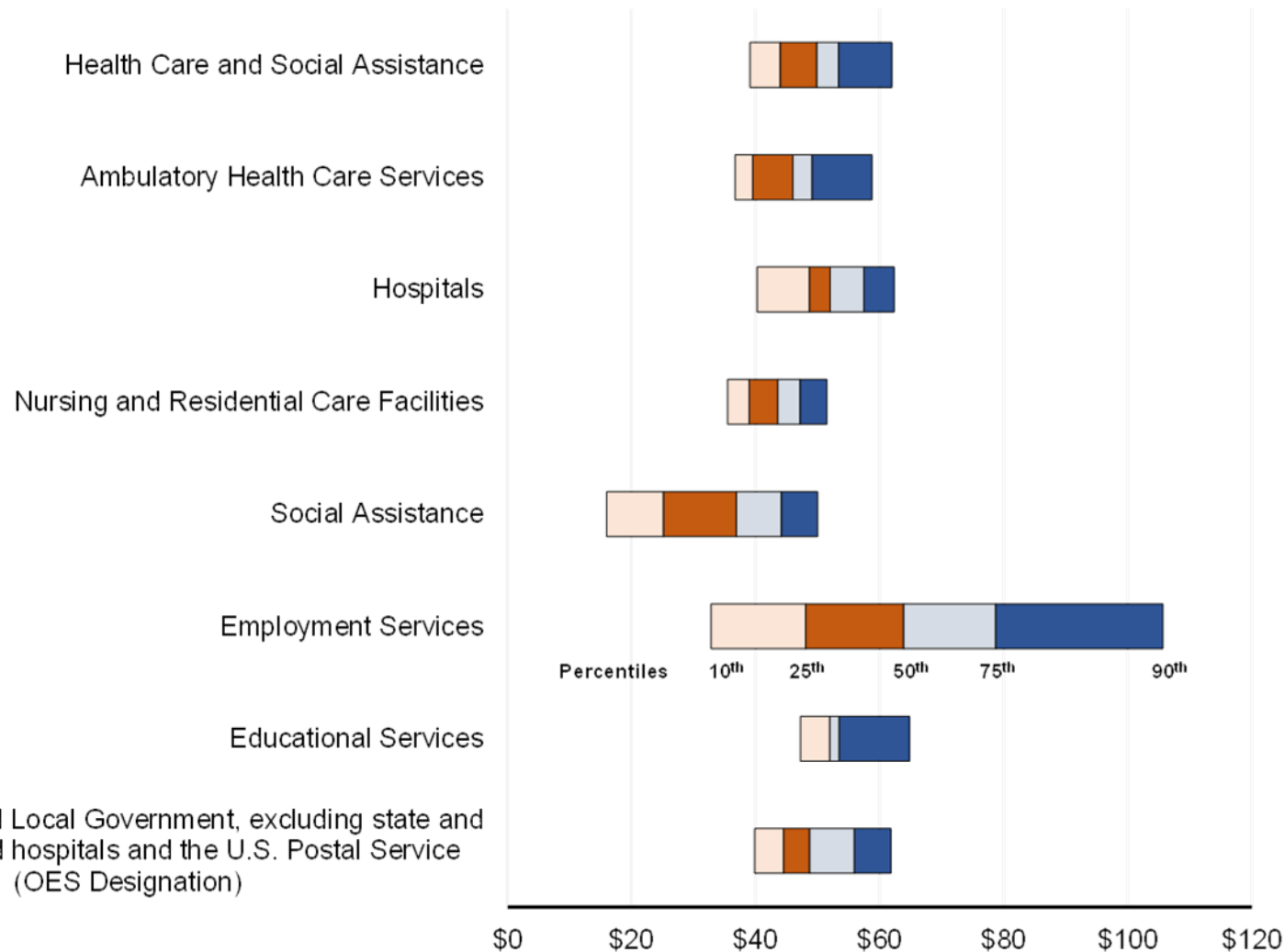


Home health aides and personal care providers are projected to have the most openings among health care occupations (70,200). This is in part due these type of jobs typically see a higher turnover rate than other health care occupations.

Registered nurses are projected to have over 29,000 job openings between 2022 and 2032.

# HEALTH CARE OCCUPATIONS CAN VARY IN SPECIALIZATION AND SETTING.

## DIFFERENT SECTORS ARE PAYING REGISTERED NURSES VERY DIFFERENT WAGES



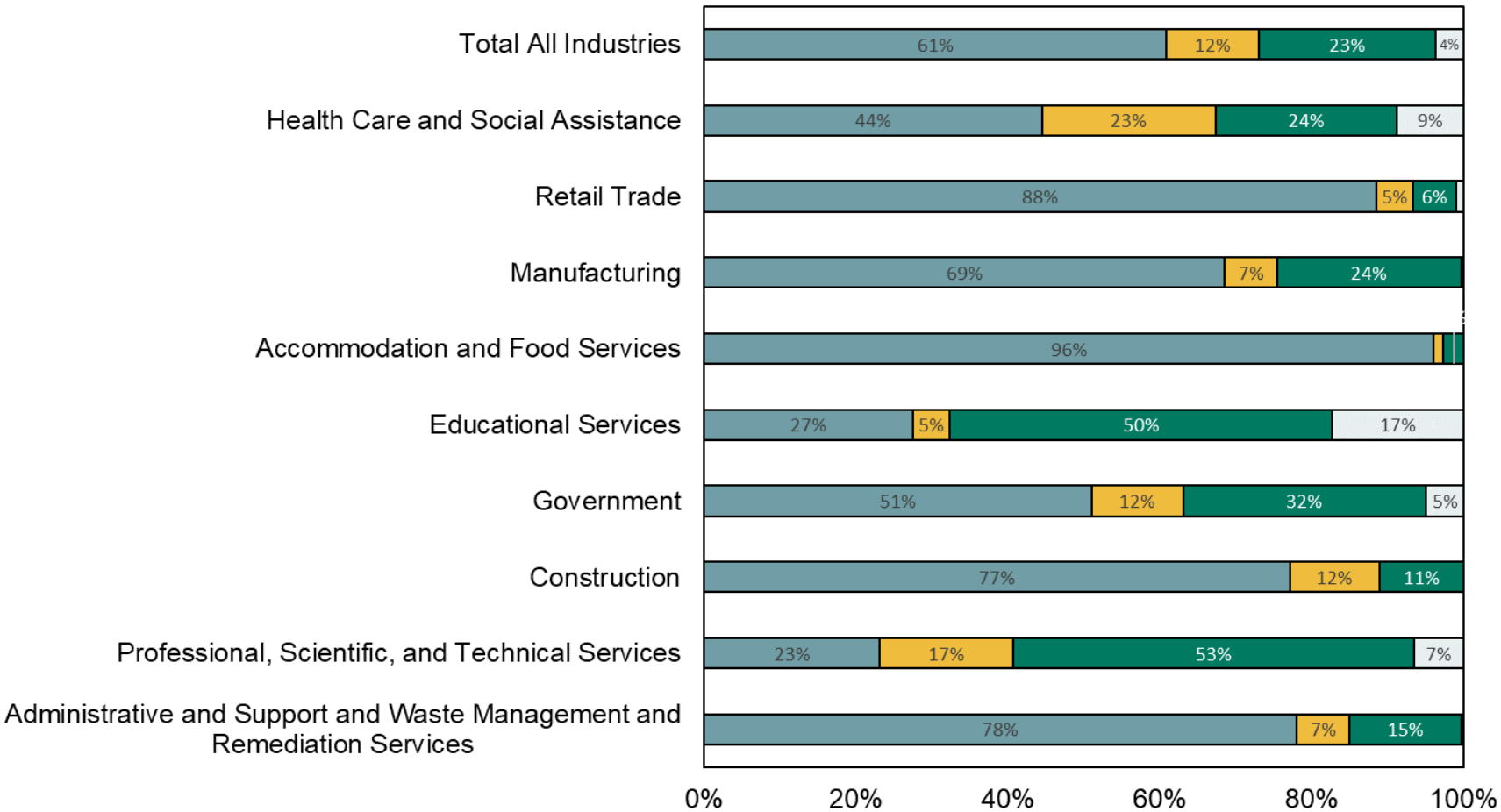
Occupations are not singular monoliths that are all employed by the same provider or perform the exact type of care.

Differences in the work requirements and pay between settings can contribute the success or challenges in hiring and retaining talented workers.

# HEALTH CARE SECTOR REQUIRES A HIGHLY EDUCATED WORKFORCE.

## Health Care Relies on a Highly Education and Skilled Workforce

■ High School or Less 
 ■ Postsecondary or Associate's Degree 
 ■ Bachelor's degree 
 ■ Advanced Degree



The health care sector needs a highly skilled, talented workforce. A higher share of jobs in health care require postsecondary education (56%) than what we generally see for all industries in Oregon (40%).

# HEALTH CARE HAS A VERY EDUCATED WORKFORCE.

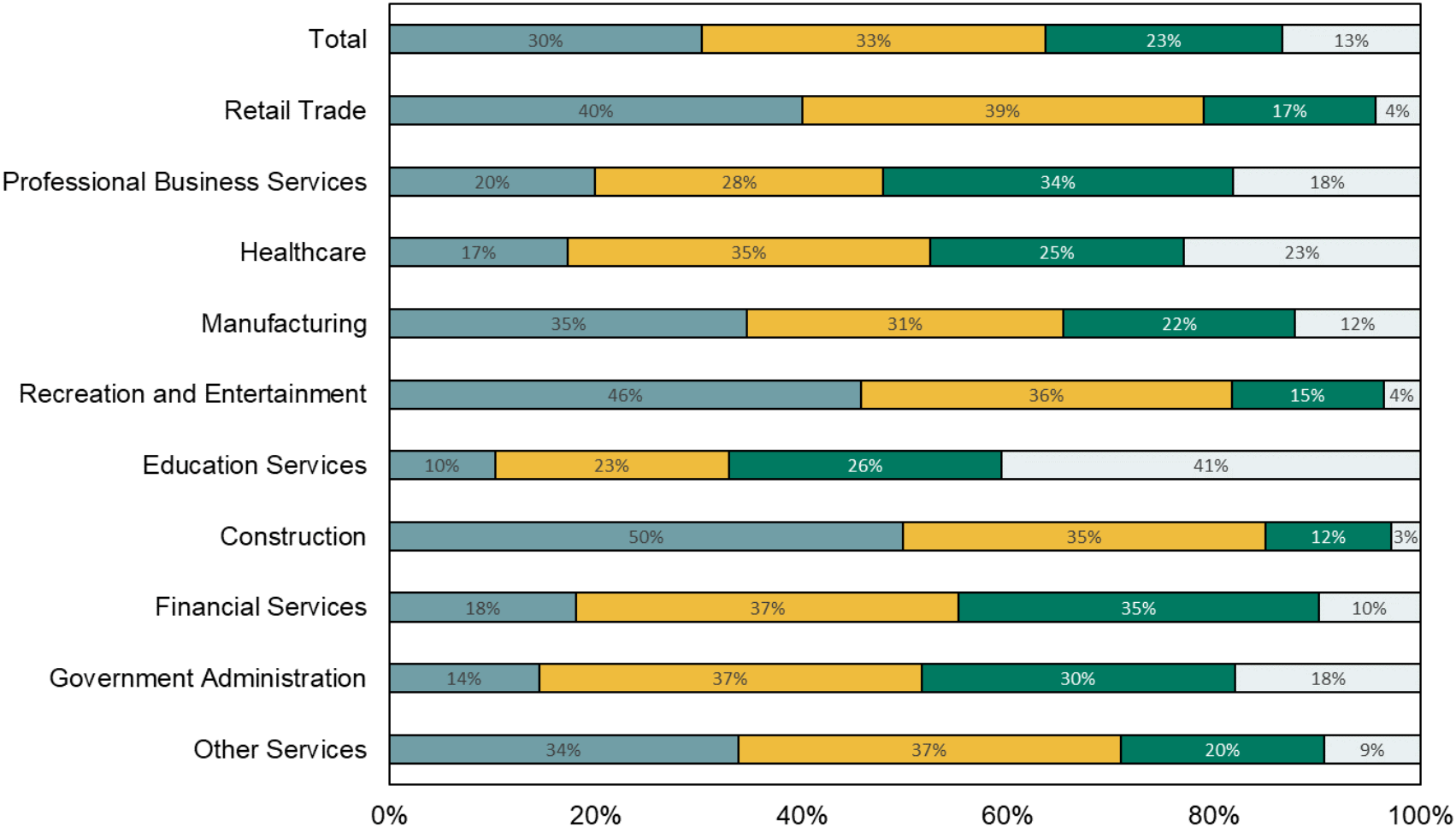
Worker Education Attainment Typically Exceed Industry Education Requirements

- High School or Less
- Postsecondary or Associate's Degree
- Bachelor's Degree
- Advanced Degree

Our workforce typically has a higher education attainment level than what would be minimum to apply for all the jobs in Oregon.

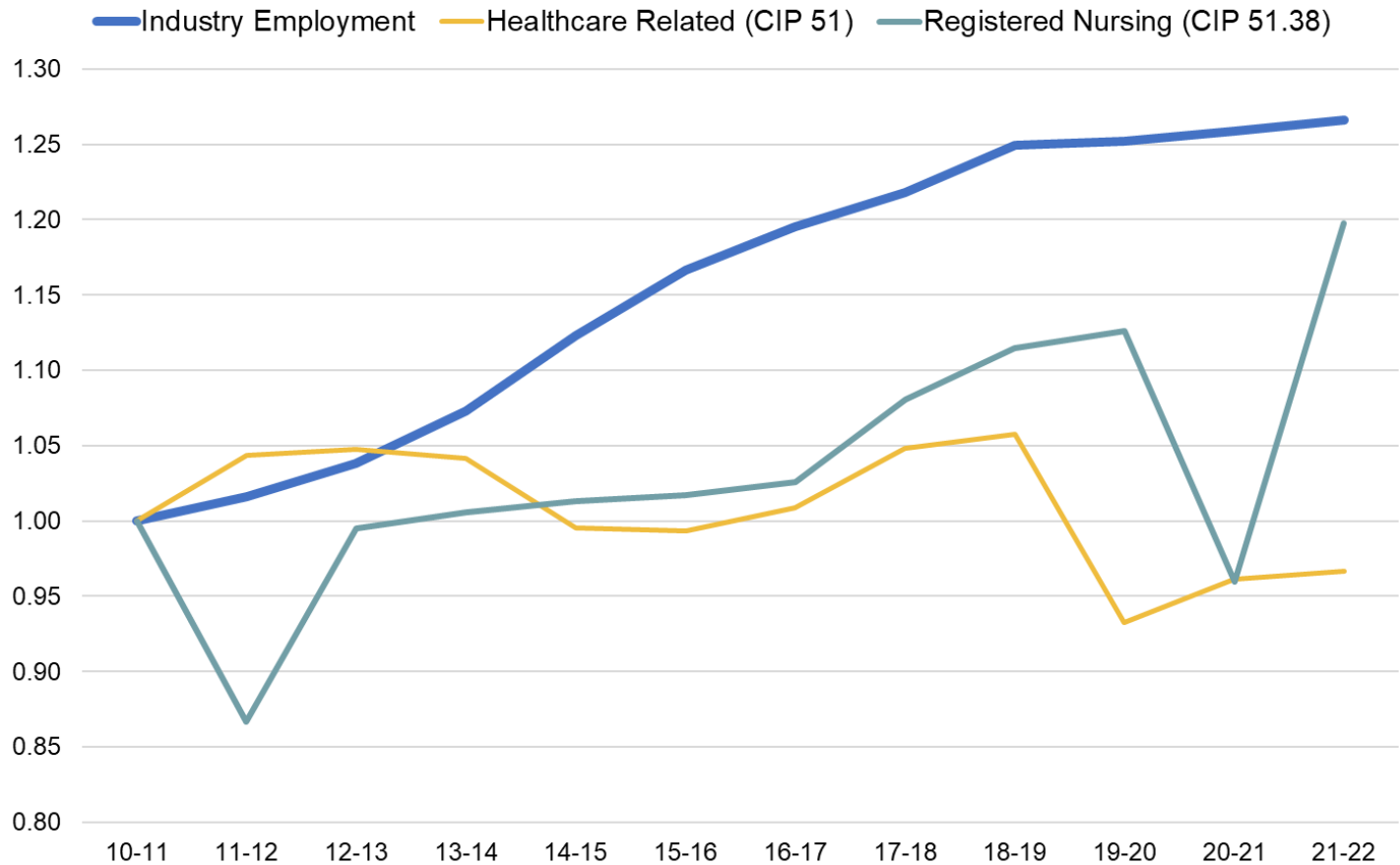
Over 80 percent of workers in health care have some form of postsecondary education.

With such a highly educated workforce, the health care sector can be vulnerable to any bottlenecks that occur in the education pipeline.



# FILLING THESE PROJECTED OPENINGS WILL RELY ON THE EDUCATION PIPELINE AND DRAWING IN WORKERS.

Healthcare Sector is Growing Faster than Oregon Completion Rates



Any sector that relies on a highly educated workforce can be vulnerable to bottlenecks in the education pipeline. That is one way of framing what happened during the pandemic.

What is clear is for careers like registered nursing Oregon relies on nurses coming into the state to fill the gap between openings and the number of Oregon completers.

Source: U.S. Department of Education, National Center for Education Statistics (Index base year = 2010-2011). Oregon Employment Department, Quarterly Census of Employment and Wages (Index base year = 2011).

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