

ROGUE VALLEY HEALTHCARE SECTOR WORKFORCE OVERVIEW

RWP HEALTHCARE PARTNERSHIP SECTOR MEETING
NOVEMBER 14TH, 2024

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!

WORKFORCE DEMOGRAPHICS

Implications of an Aging Workforce

Oregon's Labor Force: What Slower Population Growth and Increasing Retirements Mean for the Workforce



July 2024

NEARLY A QUARTER OF HEALTHCARE WORKERS MAY RETIRE BY 2032

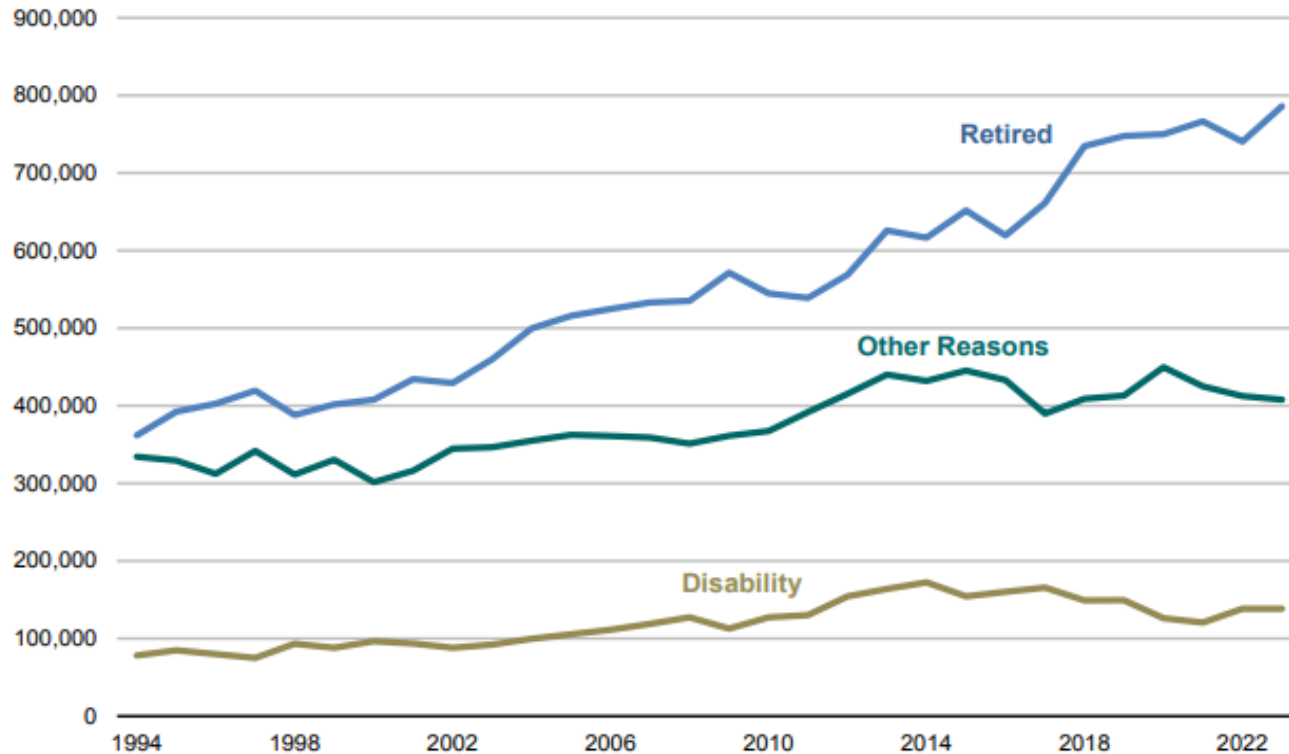
Workers Ages 55+ Could Be Within a Decade of Retirement

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%

Source: Oregon Employment Department and U.S. Census Bureau, Quarterly Workforce Indicators

NOT IN LABOR FORCE DUE TO RETIREMENT UP 5% SINCE 2019

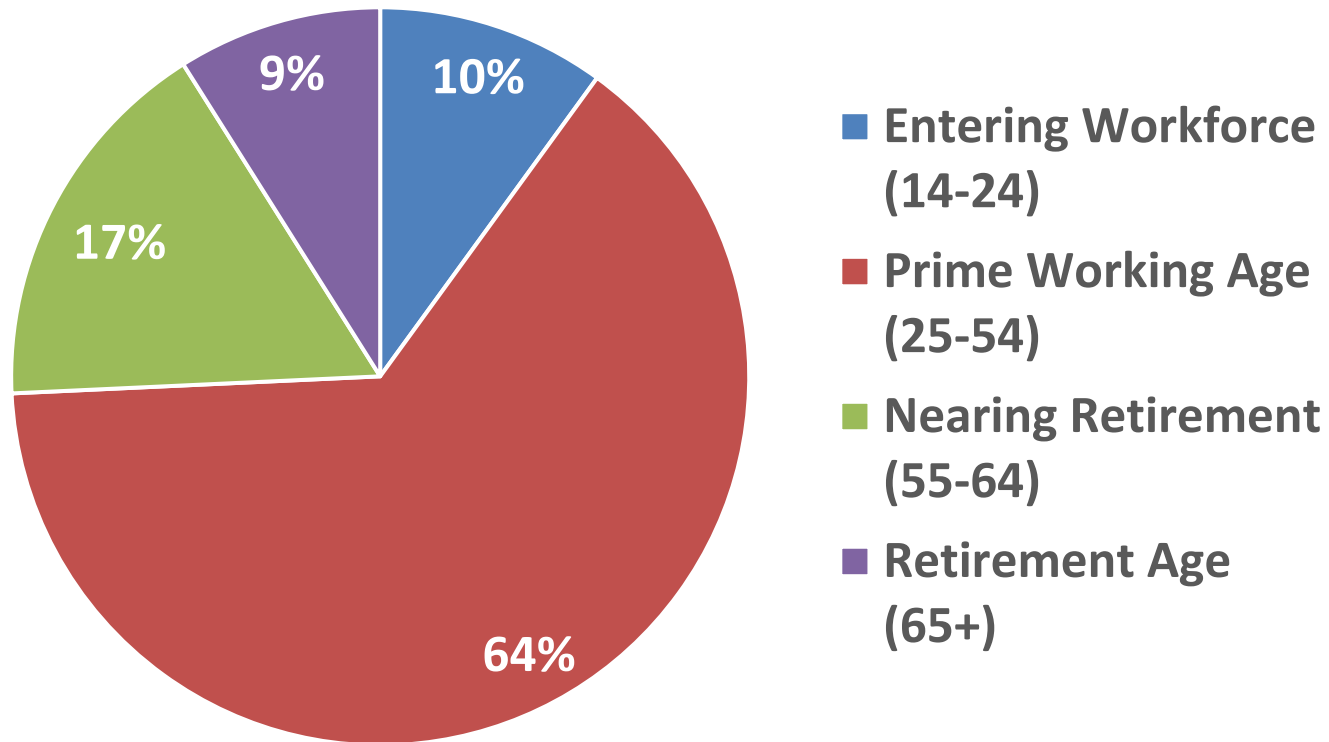
Reasons Oregonians Ages 16+ are Not in Labor Force Annual Average, 1994-2023



Source: Oregon Employment Department, Local Area Unemployment Statistics

Even in slower growing industries, many vacancies will need to be filled due to retirements, migration, and occupation changes. These “replacement” openings account for a majority of expected job openings.

Healthcare Sector Age Demographics Q1 2024



Prime working age employees in the 25-54 age range account for about two out of every three healthcare employees in the Rogue Valley.

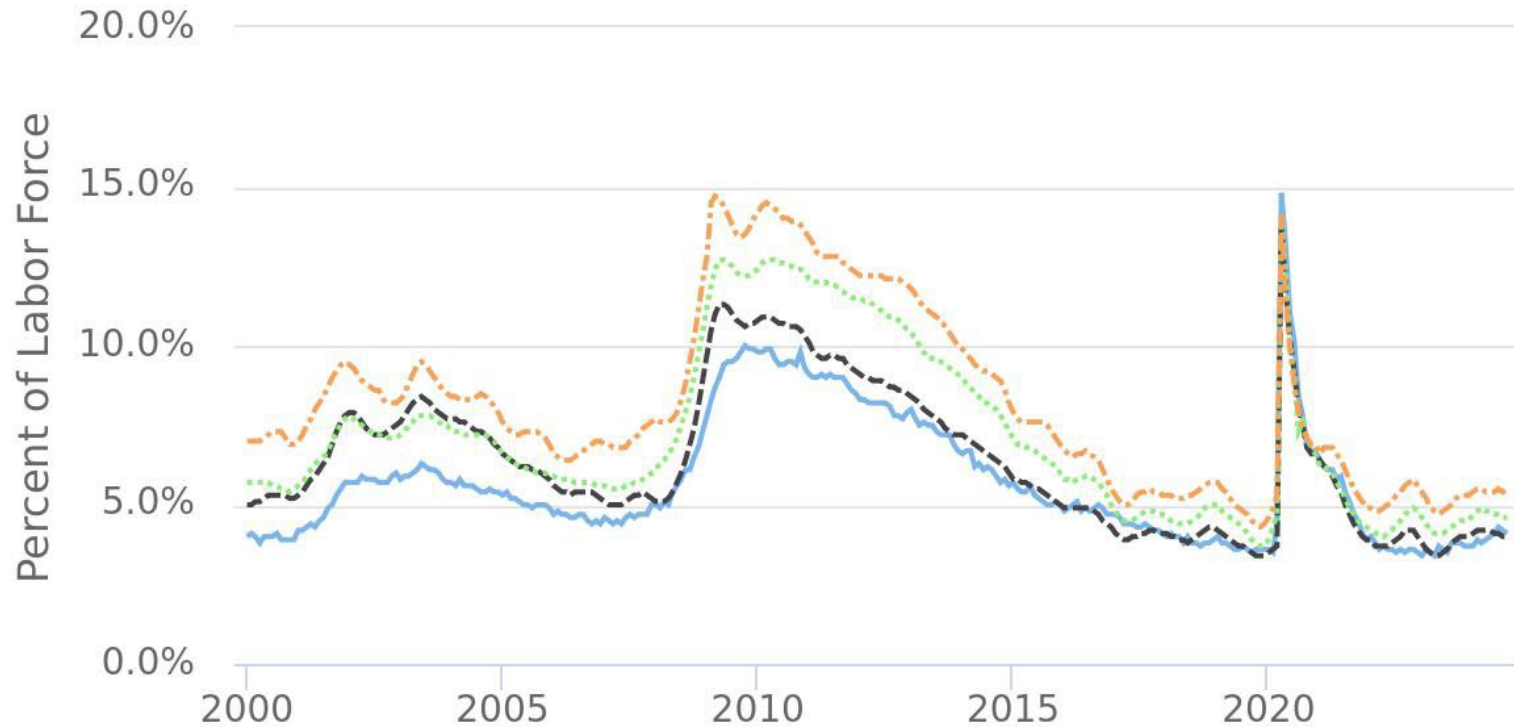
Source: U.S. Census Bureau Quarterly Workforce Indicators

EMPLOYMENT OVERVIEW

Trends and Industry Profiles

UNEMPLOYMENT RATE SLIGHTLY ABOVE HISTORICALLY LOW LEVELS

Unemployment Rate

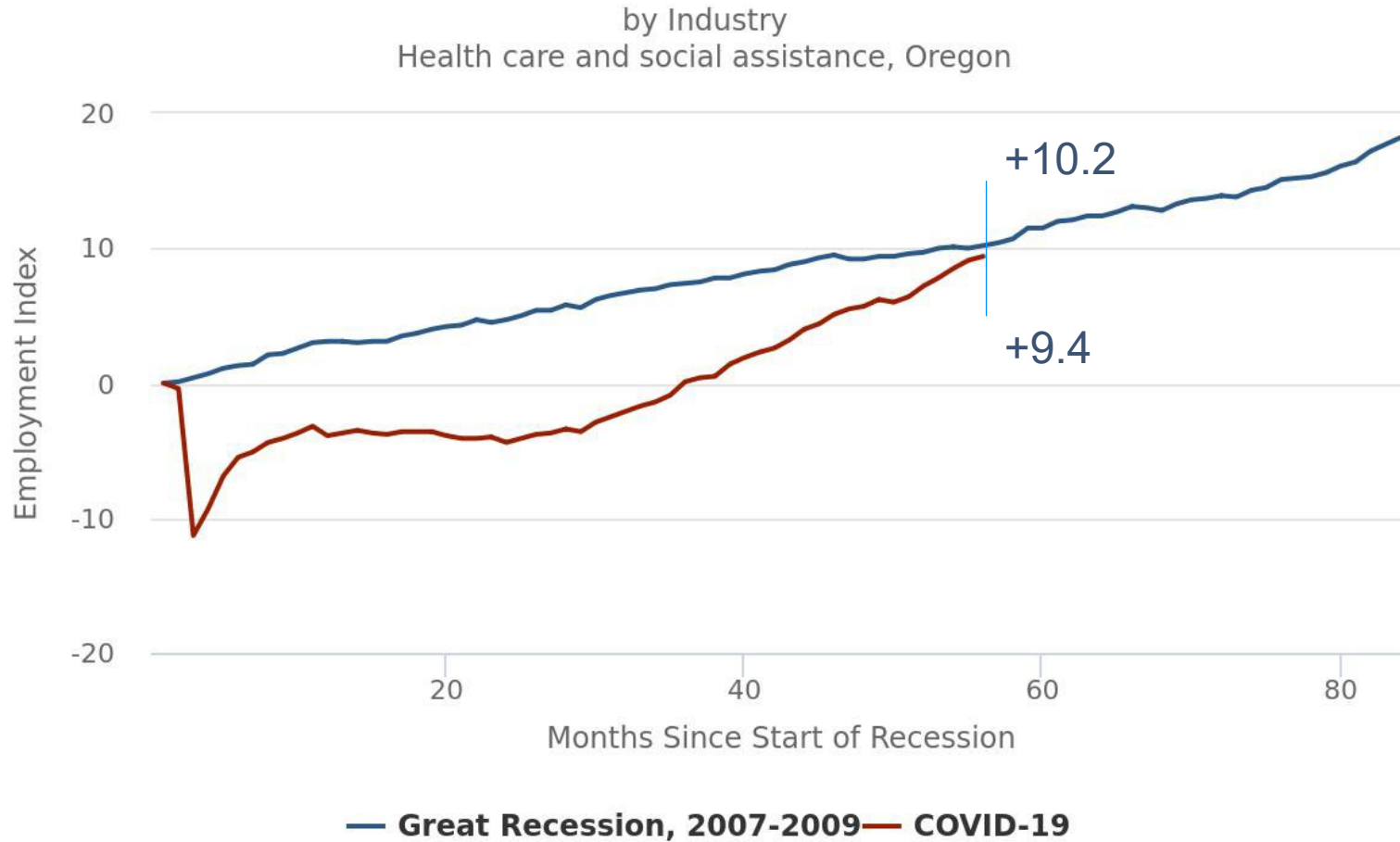


Area	Unemployment Rate
United States	4.1%
Oregon	4.0%
Jackson County	4.6%
Josephine County	5.5%

— United States (Seasonally Adjusted) -- Oregon (Seasonally Adjusted)
 Jackson County (Seasonally Adjusted) -.- Josephine County (Seasonally Adjusted)

Source: Oregon Employment Department Qualityinfo.org

COVID-19 Job Changes Compared to Great Recession Job Changes

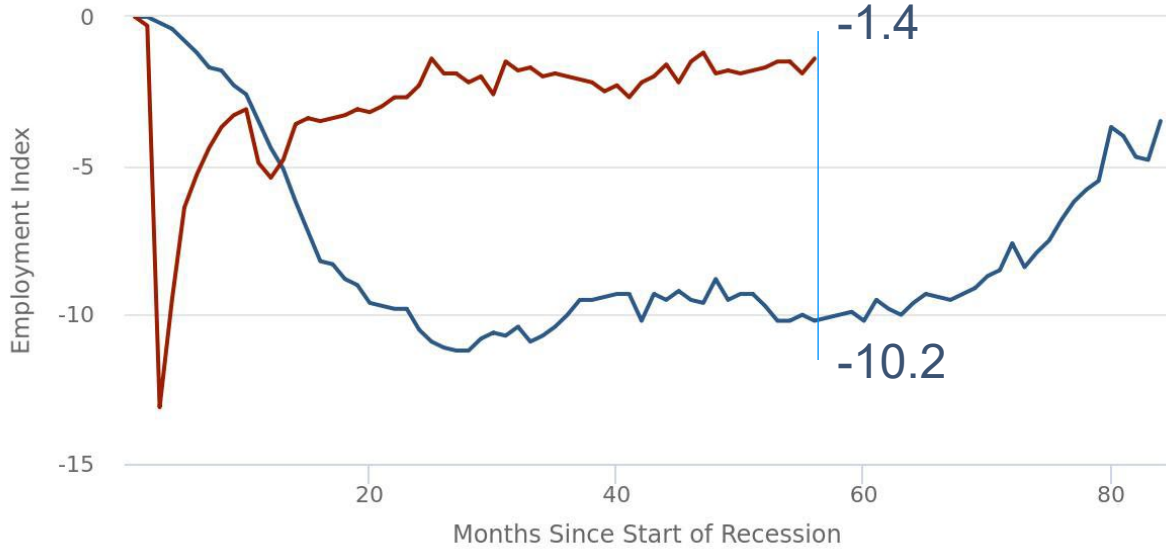


Source: Oregon Employment Department QualityInfo.org

JACKSON COUNTY FARING SLIGHTLY BETTER RECOVERING FROM THE PANDEMIC

COVID-19 Job Changes Compared to Great Recession Job Changes

by Area
Total Nonfarm, Grants Pass, OR MSA

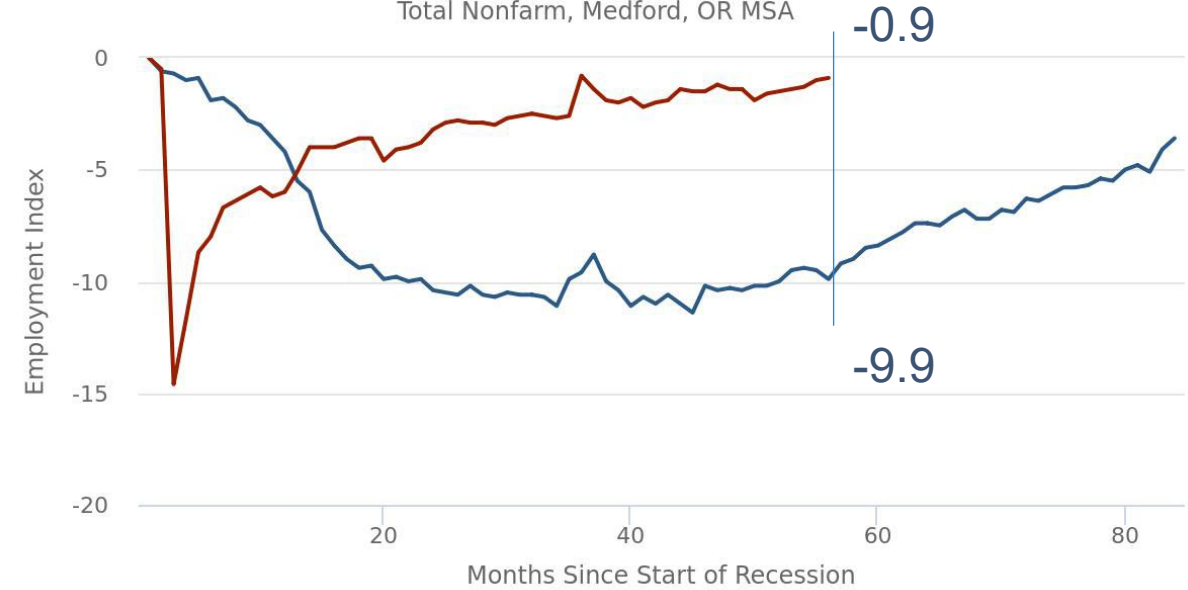


— Great Recession, 2007-2009 — COVID-19

Source: Oregon Employment Department QualityInfo.org

COVID-19 Job Changes Compared to Great Recession Job Changes

by Area
Total Nonfarm, Medford, OR MSA



— Great Recession, 2007-2009 — COVID-19

Source: Oregon Employment Department QualityInfo.org

Medford MSA job losses -0.9 compared to -1.4 for Grants Pass MSA 56 months after the beginning of the pandemic.

JOSEPHINE COUNTY HAS ADDED 1,400 JOBS (27%) SINCE APRIL 2020

Josephine County Private education and health services

(not seasonally adjusted)
Official Oregon Series



Source: Oregon Employment Department QualityInfo.org

JACKSON COUNTY HAS ADDED 3,500 JOBS (21%) SINCE APRIL 2020

Jackson County Private education and health services

(not seasonally adjusted)
Official Oregon Series



Source: Oregon Employment Department QualityInfo.org

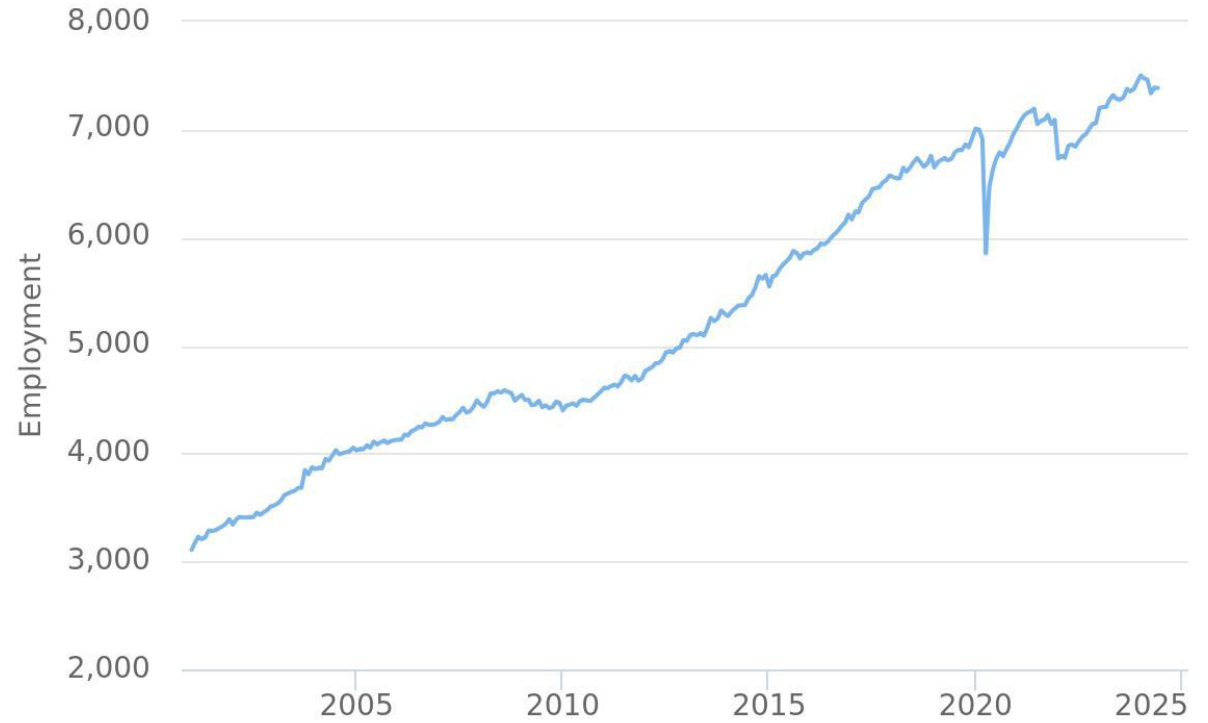
JOSEPHINE COUNTY ADDED 504 JOBS, JACKSON ADDED 1,981

621 Ambulatory Health Care Services, Private



Source: Oregon Employment Department Qualityinfo.org

621 Ambulatory Health Care Services, Private



Source: Oregon Employment Department Qualityinfo.org

622 Hospitals, Private



Source: Oregon Employment Department Qualityinfo.org

JOSEPHINE HAD LOST JOBS BY YEARS END, JACKSON RECOVERED NOVEMBER 2023

623 Nursing and Residential Care Facilities, Private



Source: Oregon Employment Department Qualityinfo.org

623 Nursing and Residential Care Facilities, Private



Source: Oregon Employment Department Qualityinfo.org

JOSEPHINE ADDED 227 BUSINESS UNITS WITH CODE CHANGE, JACKSON ADDDED 697 JOBS

624 Social Assistance, Private



Source: Oregon Employment Department Qualityinfo.org

624 Social Assistance, Private



Source: Oregon Employment Department Qualityinfo.org

HELP WANTED IN OREGON AND THE ROGUE VALLEY

Results from the Job Vacancy Survey

BUSINESSES REPORTED HIRING IN VARIOUS INDUSTRIES

Oregon Job Vacancies by Industry, Summer 2024

Industry	Vacancies
All Industries	61,013
Health care and social assistance	25,397
Retail trade	7,038
Manufacturing	4,929
Wholesale trade	4,375
Leisure and hospitality	3,513
Construction	3,166
Management, administrative, and waste services	2,863
Professional, scientific, and technical services	2,756
Other services	2,435
Financial activities	2,280
Private educational services	1,155
Transportation, warehousing, and utilities	550
Natural resources and mining	403
Information	153

Source: Oregon Employment Department

Health care and social assistance represented 42% of all vacancies, with 25,400.

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

THE ROGUE VALLEY HAD ROUGHLY 5,200 JOB VACANCIES AT ANY GIVEN TIME IN 2023.

We surveyed 1,800 private employers with two or more employees.

If they were hiring, employers gave details about each vacancy, including:

- Job title
- Full- or part-time status
- Permanent or temporary status
- Starting wage or salary
- Educational and experience requirements

Businesses also identified if their vacancies were difficult to fill, and if so, they wrote in the primary reason they faced hiring challenges.

ACROSS OREGON, BUSINESSES REPORTED ROUGHLY 72,800 VACANCIES AT ANY GIVEN TIME IN 2023.

Oregon Job Vacancies

	2019	2020	2021	2022	2023
Vacancies	57,241	44,408	96,887	103,977	72,815
Average Hourly Wage	\$18.81	\$18.05	\$19.69	\$21.66	\$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%

The number of Oregon job vacancies declined from 2022 to 2023, as the recovery from the 2020 pandemic recession slowed. Employers reported about six out of 10 openings were difficult to fill in 2023.

Characteristics Oregon employers are looking for didn't change much during the pandemic recession and recovery. A typical job vacancy tends to be for a full-time, permanent position. 39% require education beyond high school and 58% require previous experience.

Source: Oregon Employment Department

THE ROGUE VALLEY IS WITNESSING AN INCREASE IN VACANCIES DESPITE INCREASED WAGES

Rogue Valley Job Vacancies					
Health Care and Social Assistance Industry					
	2019	2020	2021	2022	2023
Vacancies	551	807	1,517	1,861	1,976
Average Hourly Wage	\$20.37	\$17.09	\$18.40	\$20.79	\$26.61
Full-time Positions	63%	68%	74%	80%	81%
Permanent Positions	97%	99%	98%	100%	97%
Requiring Education Beyond High School	50%	42%	31%	44%	57%
Requiring Previous Experience	74%	71%	45%	42%	60%
Difficult to Fill	52%	64%	78%	73%	69%

Source: Oregon Employment Department, Oregon Job Vacancy Survey of Private Employers

PRIVATE HEALTH CARE AND SOCIAL ASSISTANCE REPORTED THE MOST VACANCIES OF ANY INDUSTRY

Rogue Valley Job Vacancies by Industry, 2023

Industry	Vacancies	Average Wage
All Industries	5,214	\$22.87
Health care and social assistance	1,976	\$26.61
Leisure and hospitality	468	\$16.12
Retail trade	445	\$15.47
Construction	435	\$26.19
Manufacturing	403	\$25.74
Management, administrative, and waste services	328	\$18.61
Other services	266	\$21.29
Natural resources and mining	232	\$19.44
Professional, scientific, and technical services	208	\$23.88
Wholesale trade	158	\$23.97
Transportation, warehousing, and utilities	144	\$23.06
Financial activities	80	\$16.63
Information	40	n/a
Private educational services	31	n/a

Health care and social assistance accounted for nearly 38% of job vacancies despite having the highest annual average wage out of all industries.

Source: Oregon Employment Department

HEALTH CARE OCCUPATIONS REPRESENTED THE GROUPS WITH THE MOST VACANCIES

Rogue Valley Job Vacancies by Occupation Group, 2023

Occupation Group	Vacancies	Average Wage
All Occupations	5,214	\$22.87
Health Care Support	778	\$20.21
Health Care Practitioners and Technical	582	\$43.01
Sales and Related	426	\$15.50
Office and Administrative Support	385	\$17.60
Installation, Maintenance, and Repair	364	\$26.29
Construction and Extraction	337	\$27.80
Community and Social Service	328	\$20.91
Food Preparation and Serving Related	290	\$15.72
Transportation and Material Moving	289	\$18.56
Education, Training, and Library	245	\$18.87
Protective Service	223	\$19.15
Production	204	\$17.97
Business and Financial Operations	183	\$27.94
Management	168	\$28.19
Personal Care and Service	102	\$17.19
Arts, Design, Entertainment, Sports, and Media	101	\$20.93
Farming, Fishing, and Forestry	100	\$16.96

Source: Oregon Employment Department

These four occupational groups represent 1,790 vacancies, or roughly 34% of all vacancies with a wage gap of \$25.82/hour between the highest and lowest paid positions.

AREA BUSINESSES WERE HIRING FOR A VARIETY OF JOBS ACROSS THE ECONOMY IN 2023. THEY REPORTED VACANCIES FOR 153 DIFFERENT OCCUPATIONS

Top Rogue Valley Occupations With the Highest Number of Job Vacancies, 2023

Occupation	Vacancies
All Occupations	5,214
Nursing Assistants	362
Personal Care Aides	263
Retail Salespersons	233
Registered Nurses	190
Teaching Assistants, Preschool, Elementary, Middle, and Secondary School, Except Special Education	179
Electricians	144
Customer Service Representatives	117
Bus and Truck Mechanics and Diesel Engine Specialists	111
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	100
Firefighters	100
Construction Laborers	95
Automotive Service Technicians and Mechanics	92
Receptionists and Information Clerks	88
Licensed Practical and Licensed Vocational Nurses	82
Food Preparation Workers	77

Source: Oregon Employment Department

These four occupations represent 897 vacancies, or roughly 17% of all vacancies.

EMPLOYERS HAD MORE DIFFICULTY FILLING VACANCIES IN SOME OCCUPATIONS

Top Rogue Valley Occupations With the Highest Number of Difficult-to-Fill Job Vacancies, 2023

Occupation	Vacancies
Difficult-to-Fill Vacancies in All Occupations	3,447
Nursing Assistants	270
Registered Nurses	185
Teaching Assistants, Preschool, Elementary, Middle, and Secondary School, Except Special Education	179
Retail Salespersons	163
Electricians	124
Bus and Truck Mechanics and Diesel Engine Specialists	86
Licensed Practical and Licensed Vocational Nurses	82
Automotive Service Technicians and Mechanics	81
Construction Laborers	79
Child, Family, and School Social Workers	77
Food Preparation Workers	77
Security Guards	71
Therapists, All Other	66
Cashiers	64
Personal Care Aides	63

Nursing assistants and registered nurses were the top two difficult to fill positions with vacancies accounting for 13% of all vacancies.

Source: Oregon Employment Department

JEFF MCALLISTER, WORKFORCE ANALYST
JEFF.S.MCALLISTER@EMPLOY.OREGON.GOV

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