



2025

HEALTHCARE & SOCIAL ASSISTANCE SECTOR REPORT

THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE
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INTRODUCTION

The **Healthcare and Social Assistance Industry** has long been a cornerstone of our regional economy. Currently, healthcare makes up approximately 13% of the region's private sector employment and 12% of payroll and is projected to grow by 15% over the next ten years. During the past three years, the healthcare and social assistance sector in the Portland-Vancouver Metro Area (PVMA) has experienced worker shortages, mergers, and an increased demand for peer support and early childhood education workers.

In 2023, the **Columbia-Willamette Workforce Collaborative (CWWC)** expanded the Healthcare Target Sector to include Social Assistance. This was spurred by a need for greater access to early childhood education, mental health, and substance abuse resources across the region. Local investments, most notably Multnomah County's Preschool for All, are providing more and better opportunities for workers in this sector.

Healthcare and Social Assistance has many high-paying job opportunities, with 70% of the jobs in the industry paying \$22 or more an hour. Due to the 24-7 demand, hours are flexible and can accommodate employees' personal schedules. While 37% of jobs in this sector require a 4-year degree or higher education, many jobs require just a short vocational training for entry-level positions with unlimited

opportunity for career advancement. With the increase in an aging population, retirements, and the number of people needing access to healthcare, the industry is hard at work to meet its capacity. Additionally, as the population in the region becomes more diverse, the number of diverse employees will also need to increase to reflect the demographics of the changing population.

In 2015, the CWWC published its first Healthcare Workforce Plan for the PVMA. Recognizing that long-term care was a growing and indispensable industry within our communities, the CWWC focused on long-term care in the 2015–2017 workforce plan.

The 2025–2027 Healthcare Workforce Plan identifies three goals: Connect youth and job seekers to education, training, and apprenticeships to occupations in healthcare, Advance diversity, equity, and inclusion within the Healthcare Industry, and Retail Healthcare Professionals. The CWWC will collaborate with employers, training providers, industry experts, and job seekers from diverse communities and backgrounds to work toward these goals.

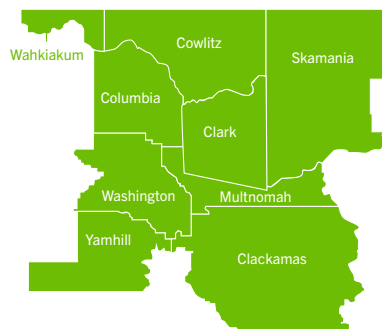
The CWWC is committed to supporting the needs of the industry by ensuring that a skilled labor pool is ready to fill open positions now and in the future.



ABOUT THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE

The **Columbia-Willamette Workforce Collaborative (CWWC)** is a partnership between Clackamas Workforce Partnership, Workforce Southwest Washington and Worksystems: the three Workforce Development Boards covering the Portland-Vancouver Metropolitan Area. The Collaborative delivers a unified approach to serving industry, supporting economic development, and guiding public workforce training investments to better address the needs of our combined labor shed. We know that people are willing to travel throughout the region for the best opportunities and that employers need the most qualified workers regardless of where they live. By working together, we can cultivate our regional talent pool and build the foundation for a strong economy.

ABOUT THE GEOGRAPHIES



Throughout this report, data is often provided for all nine counties found on the map at left. These nine counties, when combined, are referred to as the **Portland-Vancouver Metro Area (PVMA)**. The PVMA is a combination of the seven-county Portland-Vancouver-Hillsboro Metro Statistical Area (MSA) and two additional counties served by the CWWC—Cowlitz and Wahkiakum counties in Southwest Washington.

Columbia, Yamhill, and Skamania counties are not a part of the CWWC's geography, however, remain an important part of this report as they are included with the Portland MSA. In instances where data is not available for the nine-county region combined; data instead is provided for the seven-county MSA.

ABOUT THIS REPORT

The CWWC is focused on aligning and investing resources to support the workforce needs of four sectors: Advanced Manufacturing, Healthcare and Social Assistance, Clean Energy, and Construction. Sectors are chosen based on factors such as their economic significance to the region, current number of openings and job growth projections, wages that support self-sufficiency, and career ladder opportunities across the skill continuum. By examining labor market intelligence (such as the data contained in this report) and vetting the information with business partners, we can better understand industry trends, identify current and emergent workforce needs, and develop customized solutions for each sector.

OVERVIEW OF THE HEALTHCARE AND SOCIAL ASSISTANCE SECTOR

With more than 187,800 jobs and a payroll over \$15.5B, healthcare and social assistance accounts for 13% of the PVMA's private-sector employment and 12% of payroll.

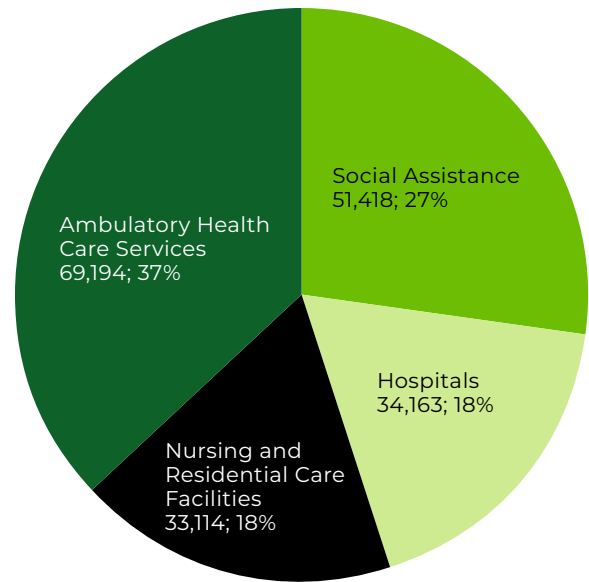
The healthcare sector contributed approximately \$18.9B to the metro area's Gross Domestic Product in 2024; 9% of all output.

The healthcare sector includes hospitals, offices of physicians, dentists, and other healthcare providers, such as outpatient health clinics (ambulatory care), and nursing and residential facilities.

The social assistance subsector provides a wide variety of services direct to clients. It includes four subsectors: individual and family services, community food and housing, and emergency and other relief services, vocational rehabilitation services, and childcare services.

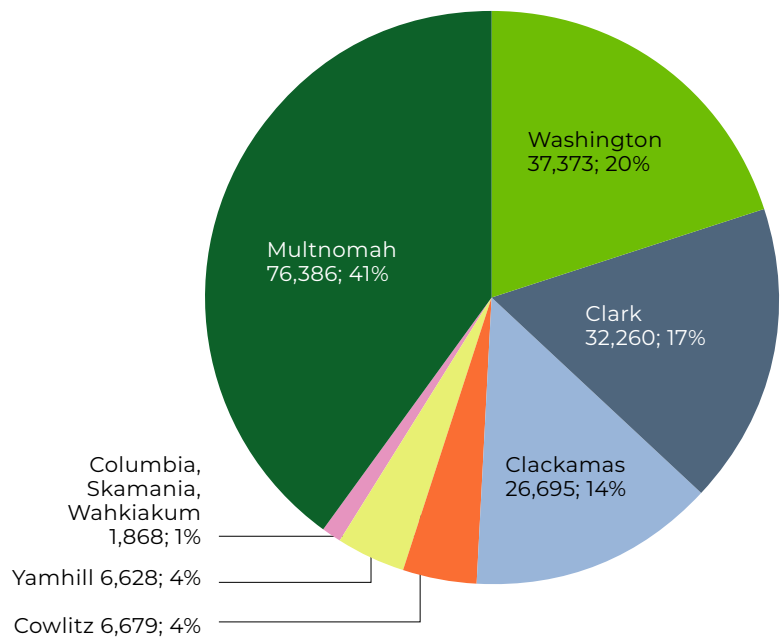
Healthcare and social assistance employment is proportionately distributed across the region, each county's share of the region's sector employment roughly matches its share of total employment.

FIGURE 1: HEALTHCARE AND SOCIAL ASSISTANCE EMPLOYMENT BY COMPONENT, PVMA, 2024



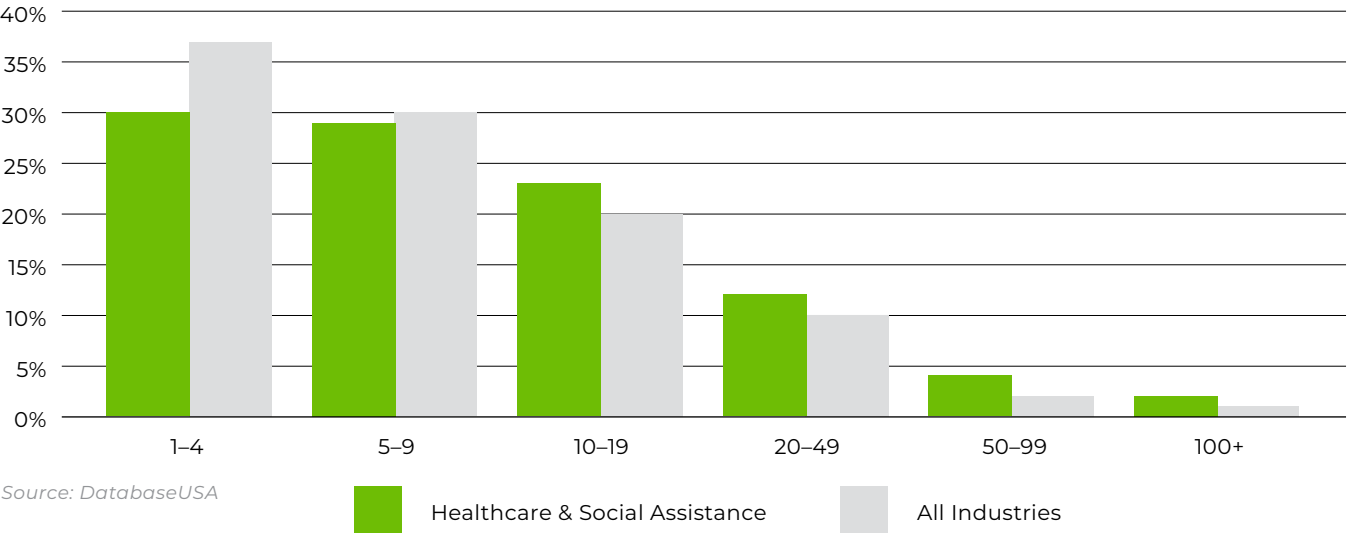
Source: Lightcast

FIGURE 2: HEALTHCARE AND SOCIAL ASSISTANCE JOBS BY COUNTY, PVMA, 2024



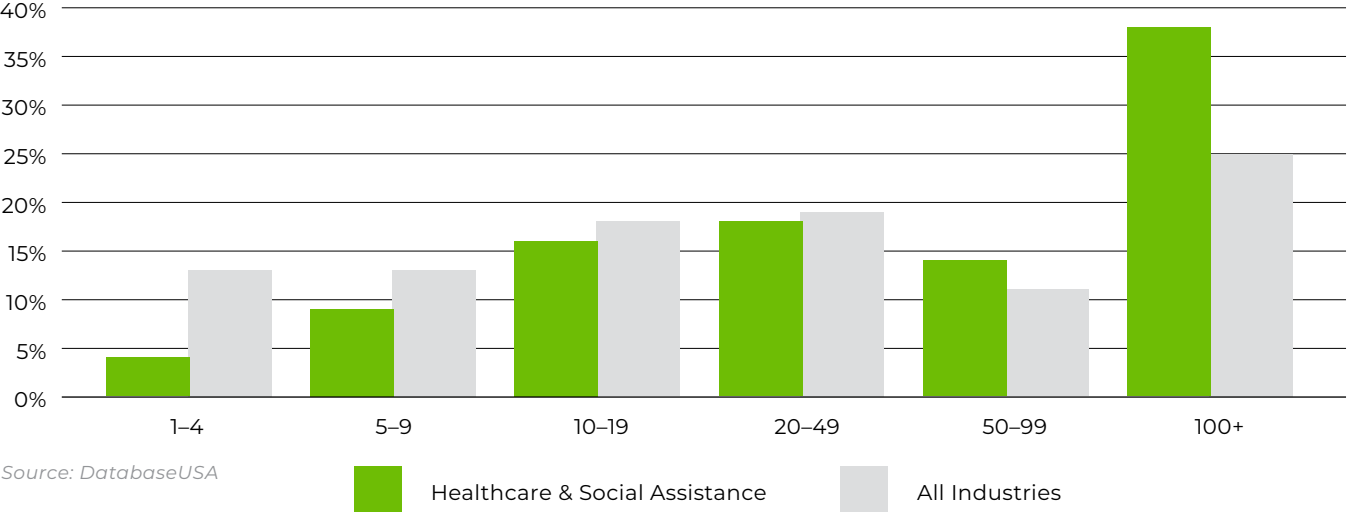
Source: Lightcast

FIGURE 3A: FIRMS BY SIZE CLASS, HEALTHCARE, PVMA, 2024



There are roughly 16,400 healthcare and social assistance establishments in the region. Healthcare and social assistance firms skewed larger; 18% had 20 or more employees compared to 13% across all industries.

FIGURE 3B: EMPLOYMENT BY SIZE CLASS, HEALTHCARE AND SOCIAL ASSISTANCE, PVMA, 2024



More than half of the region’s healthcare and social assistance employment is in establishments employing more than 100 people. The vast majority of healthcare establishments are smaller offices of healthcare professionals. However, more than one-quarter of employment is found in the region’s major hospitals.

FIGURE 5A: 2004

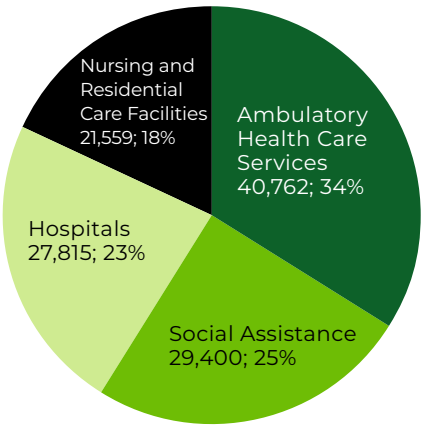


FIGURE 5B: 2014

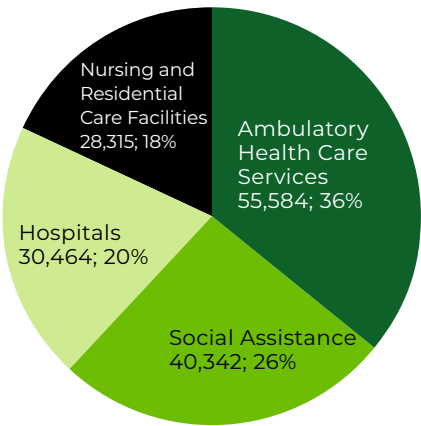
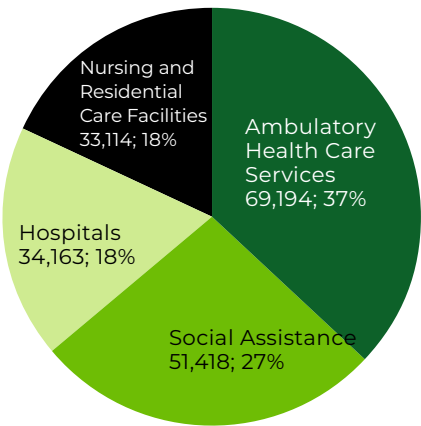


FIGURE 5C: 2024



Source: Lightcast

The landscape of healthcare has changed over the past few decades, reflecting a shift in the way services are delivered. Ambulatory healthcare (i.e. outpatient care) is growing rapidly, and consequently representing a greater share of employment. From 2004 to 2014, ambulatory healthcare added more than 28,400 new workers, an increase of 70%. During this time, ambulatory care services has increased as a percentage of the total industry.

This trend primarily grew in recent years because of the Affordable Care Act, as more people attach to primary care practitioners. Also, as health reform shifts practitioners' focus from treatment to prevention, there will likely be shifts in delivery that result in workforce changes—such as an increased need for community health workers.

Employment at the other industry subsectors also increased during this period. Employment at regional hospitals increased by 23% while employment at nursing and residential care facilities increased by more than half.

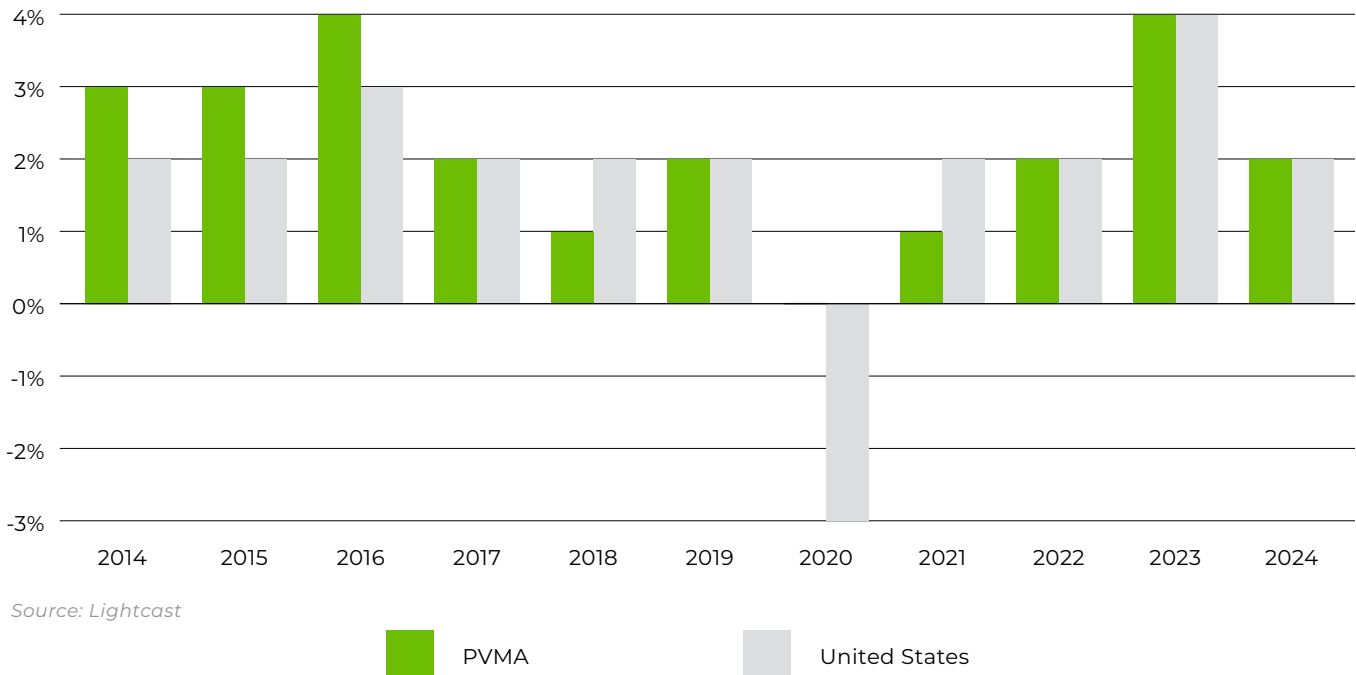
Employment in social assistance had the highest rate of increase, adding more than 22,000 new jobs.



PRIORITY AREA #1

CONNECT YOUTH AND JOB SEEKERS TO EDUCATION, TRAINING, AND APPRENTICESHIPS TO OCCUPATIONS IN HEALTHCARE.

FIGURE 6: HEALTHCARE ANNUAL GROWTH RATES, PVMA VS. UNITED STATES, 2014–2024



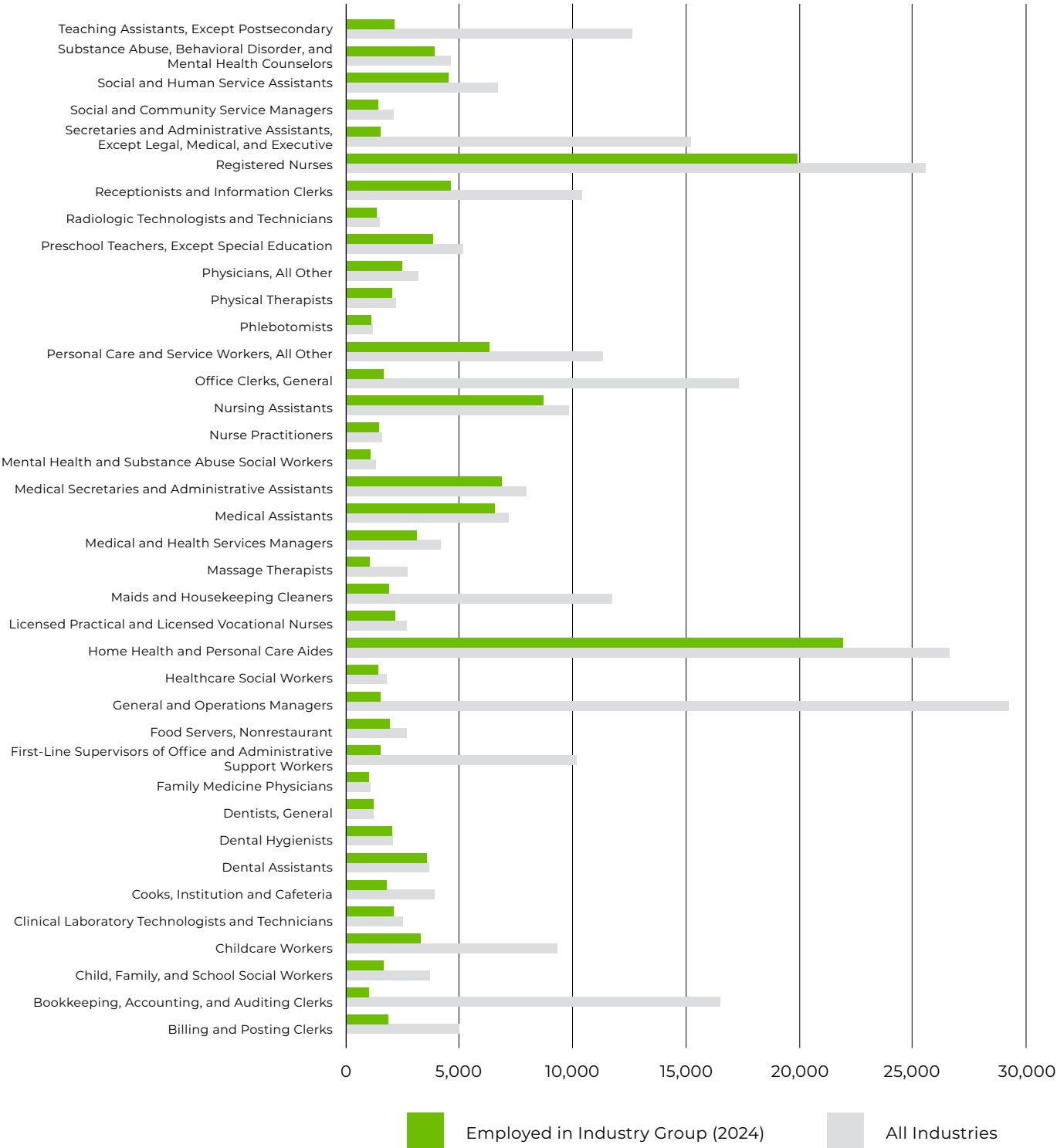
Healthcare and social assistance is a key driver of employment growth at both the national and local level.

Between 2014 and 2024, 2020 was the only year the industry did not add jobs.

After the losses in 2020, the sector rebounded both regionally and nationally. During the past two years, growth has been slightly stronger regionally.



FIGURE 7: TOP 10 HEALTHCARE AND SOCIAL ASSISTANCE SECTOR OCCUPATIONS, EMPLOYMENT WITHIN SECTOR VS. OUTSIDE OF SECTOR, PVMA, 2024



More than 400 occupations are found in the healthcare and social assistance sector.

Eight of the ten largest occupations are unique to the sector and not usually found elsewhere in the economy.

Fifty-five percent of workers are directly involved in patient care.

The two largest occupations, registered nurses and home health and personal care aides, account for 24% of all healthcare and social assistance employment.

TABLE 2: TOP HEALTHCARE AND SOCIAL ASSISTANCE OCCUPATIONS (ALL INDUSTRIES), PVMA, 2024–2034

DESCRIPTION	2024 JOBS	2034 JOBS	PROJECTED ANNUAL GROWTH OPENINGS
Home Health and Personal Care Aides	21,912	30,679	4,653
Personal Care and Service Workers, All Other	6,329	7,369	2,156
Childcare Workers	3,271	2,714	1,527
Teaching Assistants, Except Postsecondary	2,126	2,297	1,519
Nursing Assistants	8,699	9,992	1,498
Registered Nurses	19,907	21,779	1,448
Receptionists and Information Clerks	4,624	5,197	1,438
Medical Assistants	6,546	7,705	991
Medical Secretaries and Administrative Assistants	6,849	7,473	869
Social and Human Service Assistants	4,500	5,232	729
Preschool Teachers, Except Special Education	3,813	4,336	581
Dental Assistants	3,547	3,867	523
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	3,911	4,902	427
Medical and Health Services Managers	3,106	3,999	331
Licensed Practical and Licensed Vocational Nurses	2,167	2,576	221
Clinical Laboratory Technologists and Technicians	2,083	2,323	167
Dental Hygienists	2,012	2,191	140
Physical Therapists	2,019	2,354	91
Physicians, All Other	2,467	2,678	86

Source: Lightcast

During the next ten years, nearly 20,000 job openings are projected in top healthcare and social assistance occupation each year. Nearly a quarter of those openings will be for home health and personal care aids. Home healthcare aides are the largest occupation in the sector. It is also a job that tends to have lower wages and high turnover.

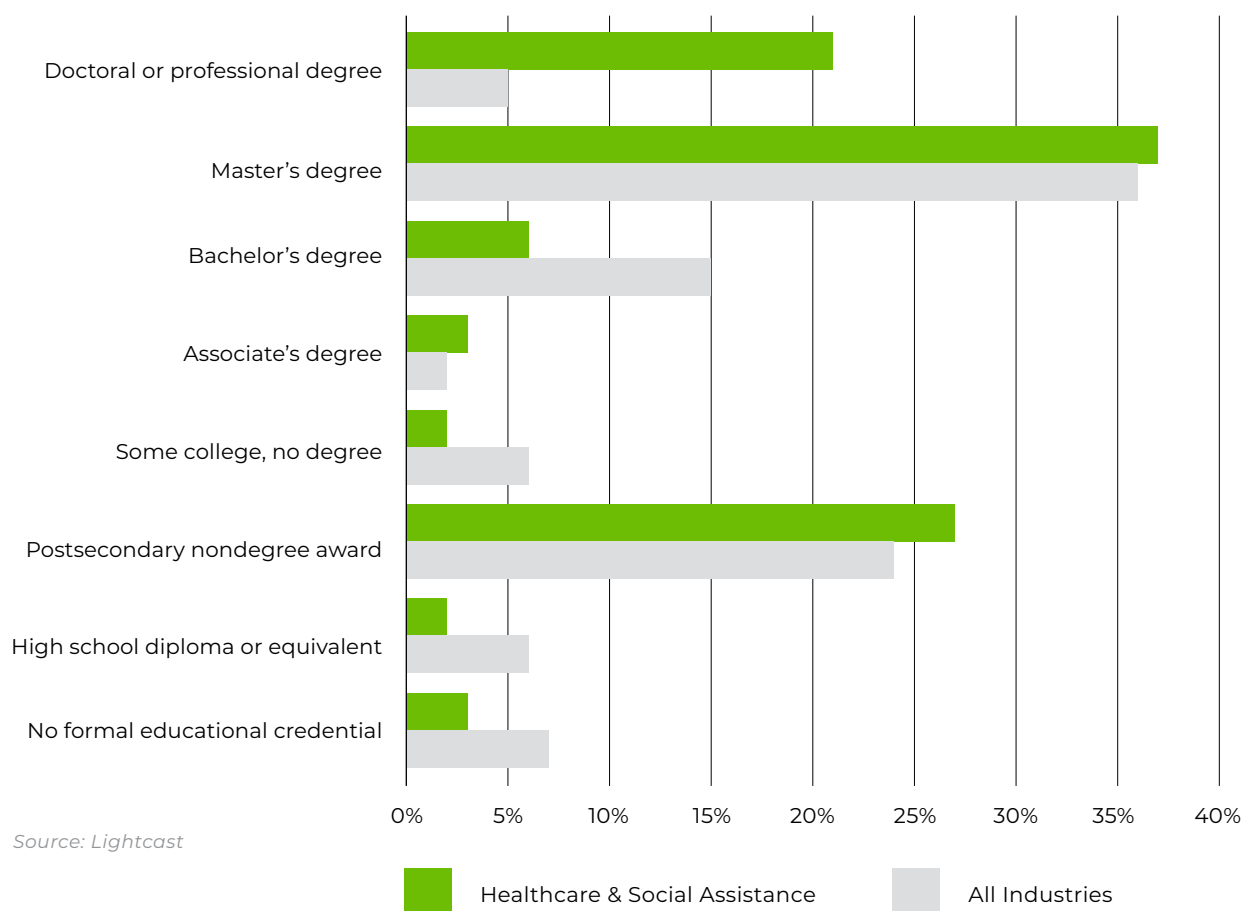
TABLE 3: : TOP HEALTHCARE AND SOCIAL ASSISTANCE OCCUPATIONS (ALL INDUSTRIES), PVMA, 2024

DESCRIPTION	EMPLOYED IN INDUSTRY (2024)	% OF TOTAL JOBS IN INDUSTRY (2024)	MEDIAN HOURLY EARNINGS	% OF MEDIAN WAGE, ALL OCCUPATIONS	LOCATION QUOTIENT	TYPICAL ENTRY LEVEL EDUCATION
Childcare Workers	3,271	1.7%	\$17.03	60%	0.89	High school diploma or equivalent
Clinical Laboratory Technologists and Technicians	2,083	1.1%	\$38.38	135%	0.87	Bachelor's degree
Dental Assistants	3,547	1.9%	\$27.27	96%	1.15	Postsecondary nondegree award
Dental Hygienists	2,012	1.1%	\$56.51	199%	1.14	Associate's degree
Home Health and Personal Care Aides	21,912	11.7%	\$19.44	68%	0.74	High school diploma or equivalent
Licensed Practical and Licensed Vocational Nurses	2,167	1.2%	\$35.74	126%	0.48	Postsecondary nondegree award
Medical and Health Services Managers	3,106	1.7%	\$66.94	236%	0.90	Bachelor's degree
Medical Assistants	6,546	3.5%	\$24.49	86%	1.08	Postsecondary nondegree award
Medical Secretaries and Administrative Assistants	6,849	3.6%	\$23.88	84%	1.25	High school diploma or equivalent
Nursing Assistants	8,699	4.6%	\$22.74	80%	0.82	Postsecondary nondegree award
Personal Care and Service Workers, All Other	6,329	3.4%	\$18.00	63%	11.72	High school diploma or equivalent
Physical Therapists	2,019	1.1%	\$48.80	172%	1.01	Doctoral or professional degree
Physicians, All Other	2,467	1.3%	\$139.64	492%	1.11	Doctoral or professional degree
Preschool Teachers, Except Special Education	3,813	2.0%	\$18.65	66%	1.18	Associate's degree
Receptionists and Information Clerks	4,624	2.5%	\$18.85	66%	1.19	High school diploma or equivalent
Registered Nurses	19,907	10.6%	\$56.40	199%	0.93	Bachelor's degree
Social and Human Service Assistants	4,500	2.4%	\$22.56	79%	1.83	High school diploma or equivalent
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	3,911	2.1%	\$30.35	107%	1.22	Bachelor's degree
Teaching Assistants, Except Postsecondary	2,126	1.1%	\$20.67	73%	1.12	Some college, no degree

Source: Lightcast

The 10 largest occupations make up 57% of all healthcare and social assistance employment.

FIGURE 8: HEALTHCARE AND SOCIAL ASSISTANCE EMPLOYMENT BY TYPICAL ENTRY-LEVEL EDUCATION, PVMA, 2024



Nearly all jobs in healthcare and social assistance require an educational credential. Just 5% of healthcare and social assistance jobs are available to workers who do not have a formal educational credential. This is significantly lower than the 21% of all jobs across the region with the same requirement.

Forty-three percent of jobs in healthcare and social assistance require an associate degree or higher compared to just 34% of all jobs.



TABLE 4: TRAINING AND DEGREE GRADUATE COMPLETER DATA FOR HEALTHCARE AND SOCIAL SCIENCE RELATED PROGRAMS, PVMA, 2019–2023

	2019	2020	2021	2022	2023
Audiology/Audiologist and Speech-Language Pathology/Pathologist	28	24	24	25	26
Child Care Provider/Assistant	0	0	0	0	0
Chiropractic	154	163	158	154	154
Clinical Nutrition/Nutritionist	173	159	189	183	184
Community Health and Preventive Medicine	121	108	97	105	87
Dental Assisting/Assistant	0	0	0	0	0
Dental Hygiene/Hygienist	93	31	133	91	88
Dentistry	72	70	75	67	74
Health Information/Medical Records Technology/Technician	44	32	26	25	15
Health Services/Allied Health/Health Sciences, General	0	101	172	183	168
Human Services, General	10	20	13	27	35
Medical Administrative/Executive Assistant and Medical Secretary	21	15	19	12	8
Medical Insurance Coding Specialist/Coder	30	19	18	11	8
Medical Insurance Specialist/Medical Biller	3	4	8	13	7
Medical Office Management/Administration	0	0	0	0	0
Medical Radiologic Technology/Science - Radiation Therapist	39	66	15	38	34
Medical/Clinical Assistant	60	39	23	20	25
Medicine	126	151	158	149	166
Mental Health Counseling/Counselor	74	83	64	91	88
Ophthalmic Technician/Technologist	19	0	23	31	22
Optometry	89	91	88	85	91
Pharmacy	106	100	92	96	77
Pharmacy Technician/Assistant	21	5	8	2	2
Physical Therapy Assistant	23	18	24	24	22
Physical Therapy/Therapist	86	82	94	91	97
Physician Assistant	99	98	101	100	118
Public Health, General	76	60	89	85	133
Registered Nursing/Registered Nurse	1,387	1,388	1,197	1,518	1,419
Respiratory Care Therapy/Therapist	42	45	40	58	49
Social Work	480	504	478	493	515
Social Work, Other	0	0	0	0	0
Substance Abuse/Addiction Counseling	25	17	25	23	21
Surgical Technology/Technologist	58	41	22	51	48

Source: Lightcast

Schools in the PVMA offer training and education programs for more than 30 healthcare and social assistance occupations. Over the past five years, more than 18,000 people have completed such programs.

The program with the largest number of completions each year is registered nursing. Between 2019 and 2023, nearly 7,000 people completed registered nursing programs. The second largest program is social work.

TABLE 5: TRAINING AND DEGREE GRADUATES, HEALTHCARE-RELATED PROGRAMS, PVMA, BY SCHOOL, 2019–2023

	2019	2020	2021	2022	2023
Clackamas Community College	32	48	38	45	29
Clark College	186	146	181	126	142
Concorde Career College-Portland	68	51	43	60	63
George Fox University	159	244	164	170	174
Lewis & Clark College	51	57	51	64	53
Linfield University	274	267	264	247	301
Lower Columbia College	131	127	136	134	131
Mt Hood Community College	169	150	162	186	158
National University of Natural Medicine	71	67	53	50	59
Oregon Health & Science University	658	678	711	691	707
Pacific University	417	401	388	432	444
Portland Community College	184	139	128	152	136
Portland State University	456	597	644	656	652
Sumner College	23	72	70	102	81
University of Portland	223	222	70	378	259
University of Western States	263	264	301	304	303
Warner Pacific University	11	20	59	61	73

Source: Lightcast

Seventeen schools in the PVMA offer training and education programs for healthcare and social assistance occupations. Over the past five years, more than 18,000 people have completed such programs.

The schools with the largest number of students completing programs in healthcare and social assistance are Oregon Health and Science University (OHSU) and Portland State University (PSU). Together, they account for 36% of all graduates.

TABLE 6: HEALTHCARE AND SOCIAL ASSISTANCE OCCUPATIONS WITH LARGEST NUMBER OF ONLINE JOB POSTINGS, PVMA, 2024

OCCUPATION	UNIQUE POSTINGS FROM JAN 2024-DEC 2024	AVG. POSTING INTENSITY (JAN 2024-DEC 2024)	MEDIAN HOURLY ADVERTISED SALARY	AVG. UNIQUE (JAN 2024-DEC 2024)	ONLINE PROFILES
Registered Nurses	7,774	5 : 1	\$56.49	648	8,620
Home Health and Personal Care Aides	2,766	3 : 1	\$19.94	231	1,423
Medical and Health Services Managers	2,083	3 : 1	\$39.75	174	3,332
Medical Assistants	1,715	5 : 1	\$25.23	143	2,201
Nursing Assistants	1,523	4 : 1	\$22.89	127	1,202
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	1,307	4 : 1	\$31.69	109	1,134
Licensed Practical and Licensed Vocational Nurses	1,207	4 : 1	\$35.57	101	467
Unclassified Occupation	1,201	3 : 1	\$25.48	100	3,972
Health Technologists and Technicians, All Other	1,190	5 : 1	\$24.00	99	1,653
Dental Assistants	1,183	3 : 1	\$26.46	99	656
Nurse Practitioners	889	3 : 1	\$69.66	74	613
Physical Therapists	829	3 : 1	\$48.12	69	867
Preschool Teachers, Except Special Education	781	4 : 1	\$19.26	65	791
Counselors, All Other	744	4 : 1	\$21.91	62	158
Child, Family, and School Social Workers	652	4 : 1	\$31.88	54	1,009
Medical Secretaries and Administrative Assistants	576	4 : 1	\$20.80	48	296
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	521	3 : 1	\$23.20	43	2,014
Community and Social Service Specialists, All Other	511	3 : 1	\$23.38	43	1,366
Receptionists and Information Clerks	489	3 : 1	\$19.14	41	621
Magnetic Resonance Imaging Technologists	469	4 : 1	\$53.29	39	140
Teaching Assistants, Except Postsecondary	451	3 : 1	\$18.52	38	461
Physical Therapist Assistants	442	3 : 1	\$30.15	37	264
Dietitians and Nutritionists	440	4 : 1	\$38.03	37	454
Radiologic Technologists and Technicians	425	3 : 1	\$44.68	35	300
Mental Health and Substance Abuse Social Workers	402	4 : 1	\$31.26	34	336
Occupational Therapists	401	3 : 1	\$50.09	33	353

Source: Lightcast

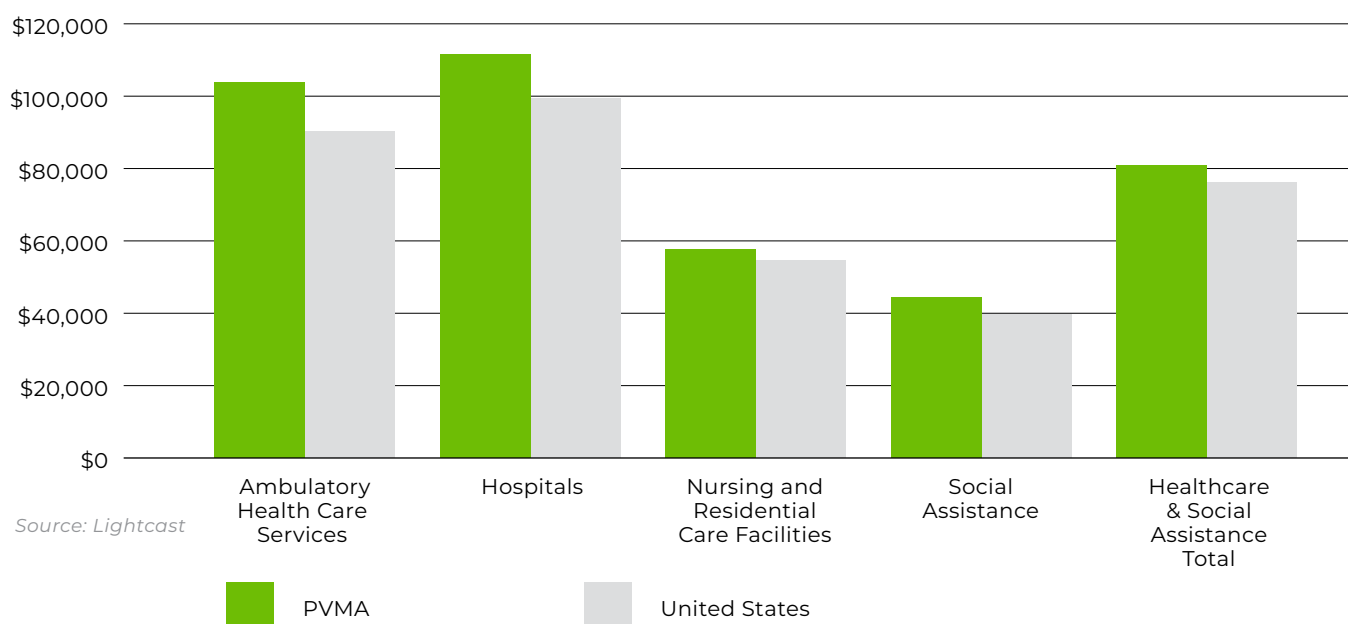
Unique job postings denote the number of unique job advertisements listed by different companies on career sites and job boards.

Registered nurse was the most in demand of all occupations in all sectors in the PVMA in 2024. It was the top postings every month. Between January and December 2024, the hourly median advertised salary for registered nurses increased 42% (\$40.25 to \$57.48).

The demand for workers is also driving up the

advertised salary for home health and personal care aides. In 2020, the median advertised starting salary for this position was just under \$15/hour. By December 2024, it had risen 38% to \$20.68/hour.

FIGURE 9: ANNUAL AVERAGE WAGES FOR COMPONENTS OF HEALTHCARE, AND SOCIAL ASSISTANCE, PVMA AND US, 2024



The average annual wage for Healthcare and Social Assistance in the region is \$81,879, which is 10% lower than the average across all industries and 6% higher than its national counterpart.

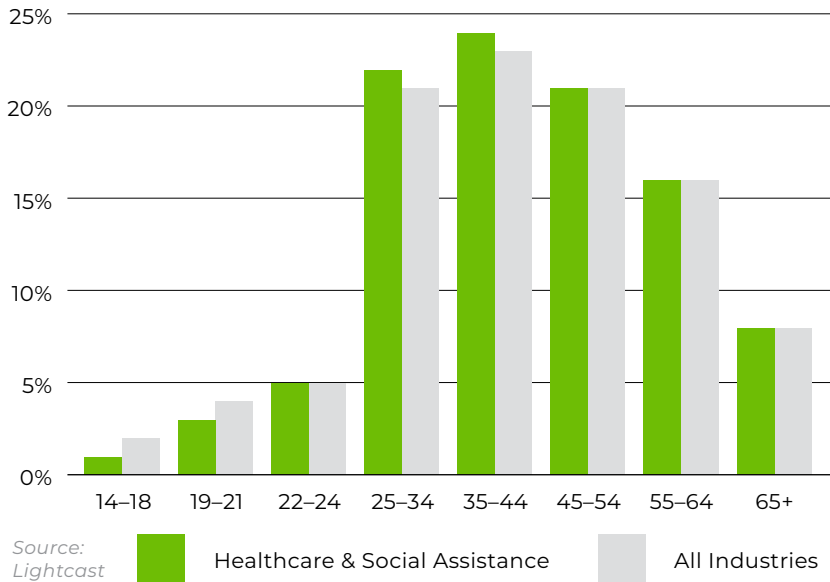
There is a large wage gap between the four sub-sectors within Healthcare and Social Assistance. Wages in the nursing and residential care component are lower than average due in part to the prevalence of low-paying occupations: four of the five largest occupations, which comprise slightly more than half of total employment, pay a median wage below \$24/hr. Two of the occupations pay a median wage below \$19/hr. Registered nurses are the only exception in this component with median hourly earnings of nearly \$62/hour. The six largest occupations within Social Assistance pay a median wage of less than \$24/hr.

The average annual wage for workers in Ambulatory Health Care Services and Hospitals is more than twice as high as the median wage in Social Assistance.

PRIORITY AREA #2

ADVANCE DIVERSITY, EQUITY, AND INCLUSION WITHIN THE HEALTHCARE AND SOCIAL ASSISTANCE INDUSTRY.

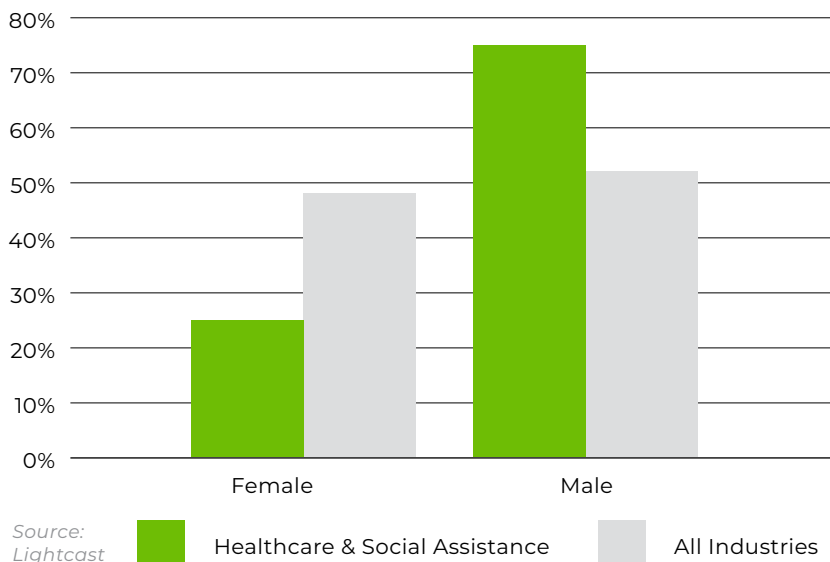
FIGURE 10: HEALTHCARE AND SOCIAL ASSISTANCE EMPLOYMENT BY AGE, PVMA, 2024



Twenty-four percent of the region's Healthcare and Social Assistance workforce is at, or nearing, retirement age.

The sector's two largest occupations, Home Health and Personal Care Aides and Registered Nurses have higher older-than-average workforce. One fifth of registered nurses and 32% of Home Health Aides, the two most in-demand occupations across all sectors, is near retirement age.

FIGURE 11: HEALTHCARE AND SOCIAL ASSISTANCE EMPLOYMENT BY GENDER, PVMA, 2024

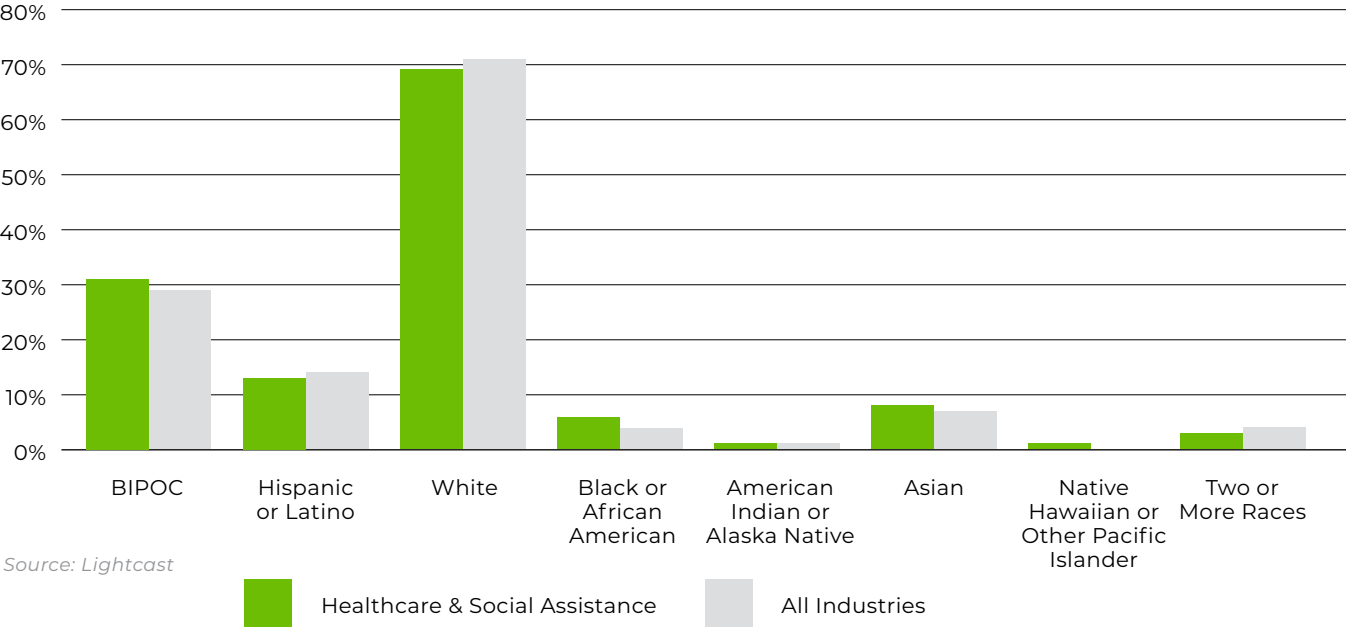


The healthcare workforce is overwhelmingly female: women outnumber men by three-to-one.

Although workers identifying as male are underrepresented in healthcare occupations overall, they are overrepresented in the healthcare occupations with the highest median wages. Workers identifying as male are 54% of workers in occupations with median wage of \$70/hour or more.

The disparity is even greater in the highest paying occupations. Sixty-four percent of workers in the nine healthcare occupations with median wages above \$100/hour identify as male.

FIGURE 12: HEALTHCARE AND SOCIAL ASSISTANCE EMPLOYMENT BY RACE (NONWHITE) AND ETHNICITY, PVMA, 2024



People who identify as white make up the vast majority of the healthcare workforce (69%), about the same as the workforce as a whole. There are more workers who identify as Asian or Black or African American and fewer that identify as Hispanic in healthcare than the average across all industries.



PRIORITY AREA #3

RETAIN HEALTHCARE PROFESSIONALS.

TABLE 7: TURNOVER RATE IN HEALTHCARE AND SOCIAL ASSISTANCE, PVMA, 2024

	TURNOVER
TOTAL, HEALTHCARE & SOCIAL ASSISTANCE	52%
Ambulatory Health Care Services	49%
Hospitals	31%
Nursing and Residential Care Facilities	80%
Social Assistance	60%
TOTAL, ALL INDUSTRIES	61%

Source: Lightcast

Note: A separation is recorded when an individual's Social Security number that appeared on a company's payroll is no longer present.

By comparing separations to the total number of jobs in an occupation, we can benchmark the level of movement taking place in that occupation.

Turnover refers to the change in the workforce due to employee separations and hiring.

Overall, healthcare has less turnover than the overall economy. The exception is long-term care workers at 80%, which is significantly higher than economywide turnover rate of 61%. According to the National Commission for Quality Long-Term Care, this is attributed to low job satisfaction, poor pay and benefits, and the emotional and physical toll of providing long-term care.

TABLE 8: HEALTHCARE AND SOCIAL ASSISTANCE OCCUPATIONS ADDING THE LARGEST NUMBER OF JOBS, PVMA, 2024–2034

DESCRIPTION	2024 JOBS	2034 JOBS	GROWTH	PERCENT GROWTH	SHARE OF SECTOR GROWTH	ANNUAL REPLACEMENT JOBS
Home Health and Personal Care Aides	26,615	36,399	9,783	37%	36%	4,653
Registered Nurses	25,553	27,957	2,403	9%	9%	1,448
Nursing Assistants	9,829	11,212	1,382	14%	5%	1,498
Medical Assistants	7,157	8,389	1,232	17%	5%	991
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	4,629	5,691	1,062	23%	4%	427
Social and Human Service Assistants	6,681	7,634	953	14%	4%	729
Nurse Practitioners	1,597	2,279	681	43%	3%	85
Child, Family, and School Social Workers	3,695	4,191	497	13%	2%	301
Massage Therapists	2,711	3,181	470	17%	2%	394
Licensed Practical and Licensed Vocational Nurses	2,670	3,119	449	17%	2%	221
Veterinary Assistants and Laboratory Animal Caretakers	1,733	2,161	428	25%	2%	377

Source: Lightcast

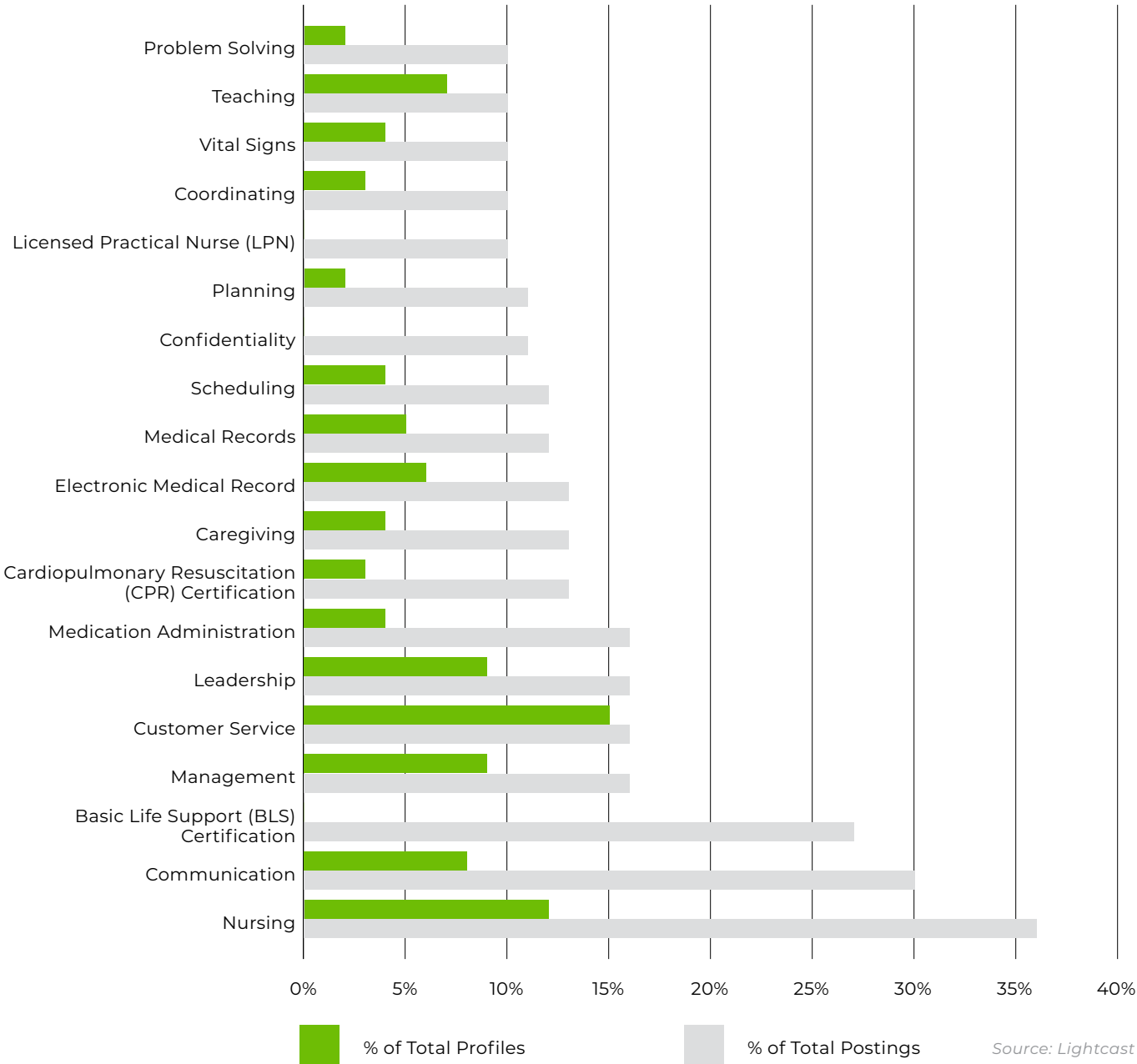
Home health and personal care aides is the fastest growing occupation, expected to add nearly 9,800 new jobs during the next decade for a growth rate of 37%.

The anticipated increase in home health and personal care aides, which large, represents a

significant decrease from the projected growth just a few years ago. In 2021, the anticipated growth rate over ten years for this profession was 74%.

The smaller growth projections are consistent across the sector's fastest growing occupations.

FIGURE 13: HEALTHCARE AND SOCIAL ASSISTANCE TOP OCCUPATIONS, HARD SKILLS, FREQUENCY IN POSTINGS VS. WORKFORCE PROFILES, PVMA, 2024

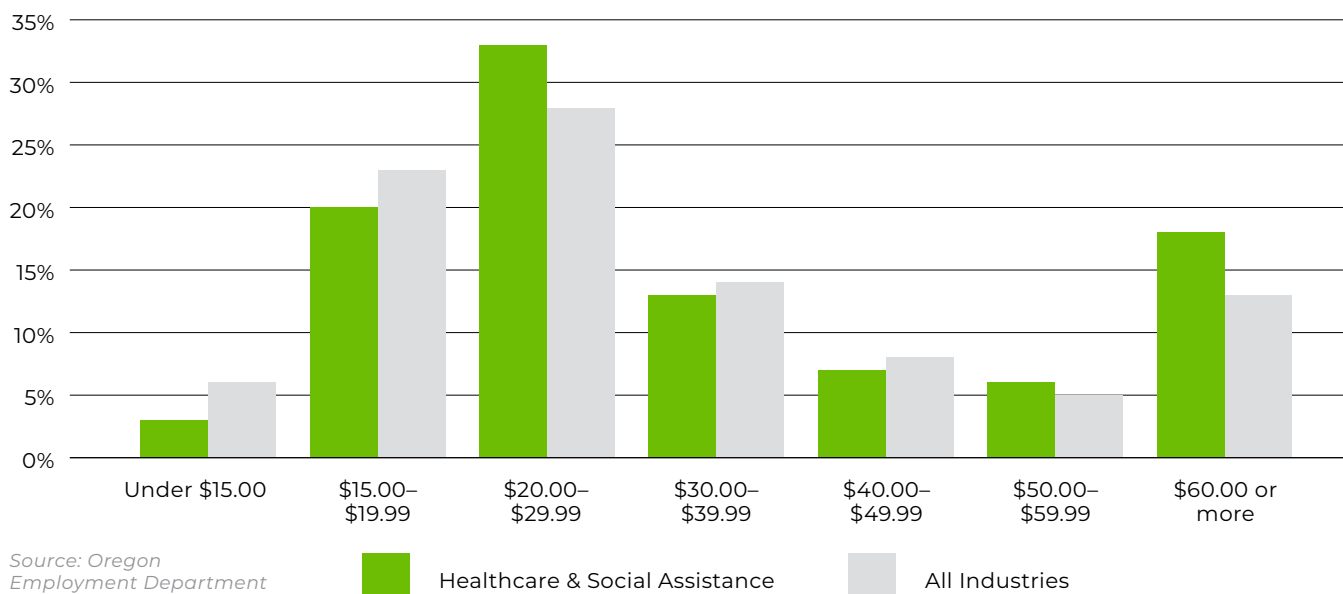


Aggregate data from online job postings can provide insights to hiring trends in the region. There appears to be a mismatch between in-demand hard skills and the availability of these skills in workforce profiles. For example, over 36% of healthcare-related online postings in the region mention nursing as a skill, however, just 12% of the regional workforce has this skill listed in their profile.

Mismatches also exist in common skills such as management and problem solving.

Job posting data is a valuable source of information about employers' needs. Training providers and job training programs can use them to inform education and training programs. They can also help future workers and career coaches identify skills and experiences to highlight in resumes and job seeker profiles.

FIGURE 14: HEALTHCARE AND SOCIAL ASSISTANCE SHARE OF EMPLOYMENT BY HOURLY WAGE, OREGON, 2023



In Oregon, there are relatively fewer lower-paying healthcare and social assistance jobs and higher-paying jobs than the rest of the economy.

Just 23% of jobs in this sector have a wage of less than \$20/hr. compared to 29% of all jobs.

Seventy-seven percent of Oregon healthcare and social assistance jobs pay \$20/hour or more.



EARLY CHILDHOOD EDUCATION

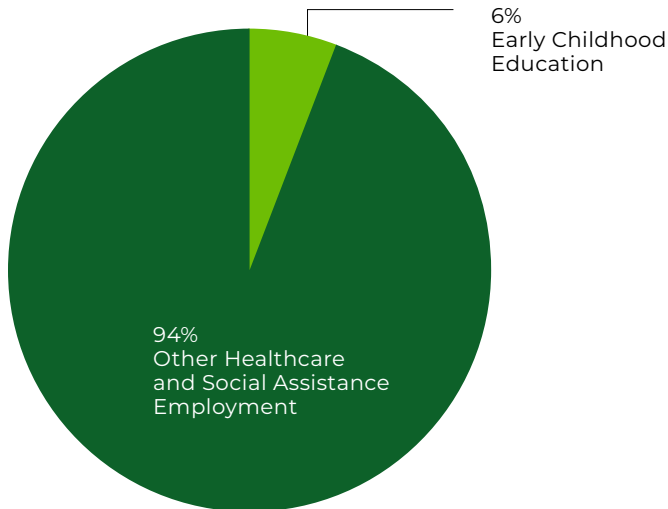
Although it is a small subset of the Healthcare and Social Assistance sector, Early Childhood Education plays a significant role in the regional economy. The availability of high quality childcare allows adults to participate in the labor force while giving kids the tools they need to succeed in school.

Recognizing the importance of Early Childhood Education, Multnomah County is investing in it's labor force. Preschool for All is expanding access to childcare for 3 and 4 year old's. The program is designed to support the industry's small workforce, offering higher wages, professional development opportunities, and integration with developmental supports.

Over the next five years, thousands of additional staff, including teachers, aides, administrators, food service workers, councilors, and custodians, will join the Early Childhood Education Sector. Worksystems' Early Learning Works program connects job seekers to careers in early childhood education, supporting the workforce needs of Preschool for All.

This section of the Healthcare and Social Assistance Sector Report shines a spotlight on the current landscape of Early Childhood Education in the PVMA.

FIGURE 15: EARLY CHILDHOOD EDUCATION EMPLOYMENT, PVMA, 2024

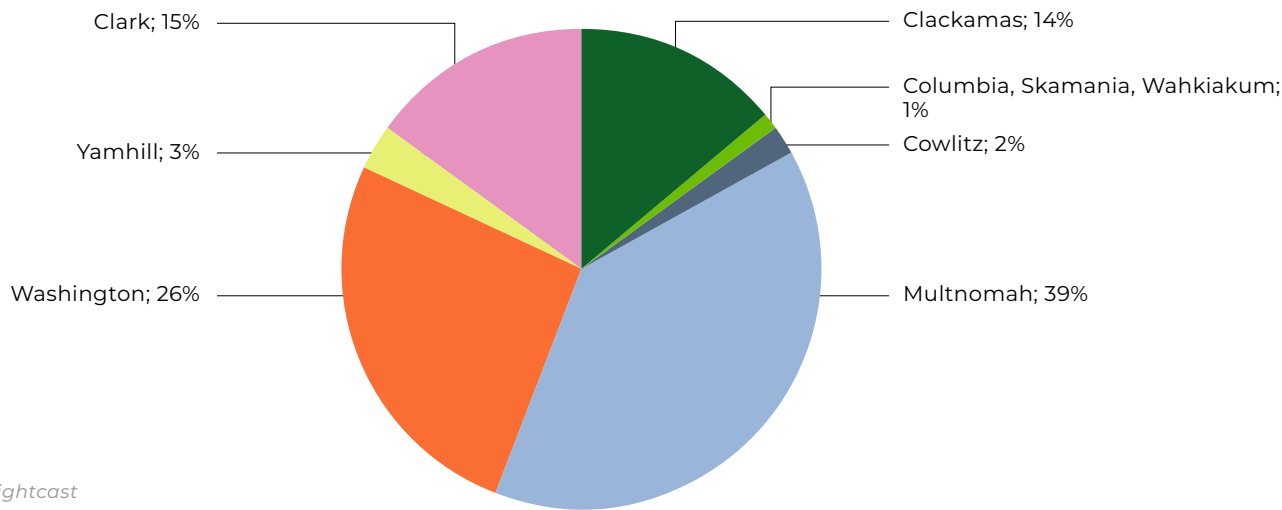


Source: Lightcast

With more than 11,600 jobs and a payroll over \$491M, healthcare and social assistance accounts for 6% of the PVMA's Healthcare and Social Assistance employment.

The healthcare sector contributed approximately \$506.7M to the metro area's Gross Domestic Product in 2024; 3% of all output from the Healthcare and Social Assistance sector.

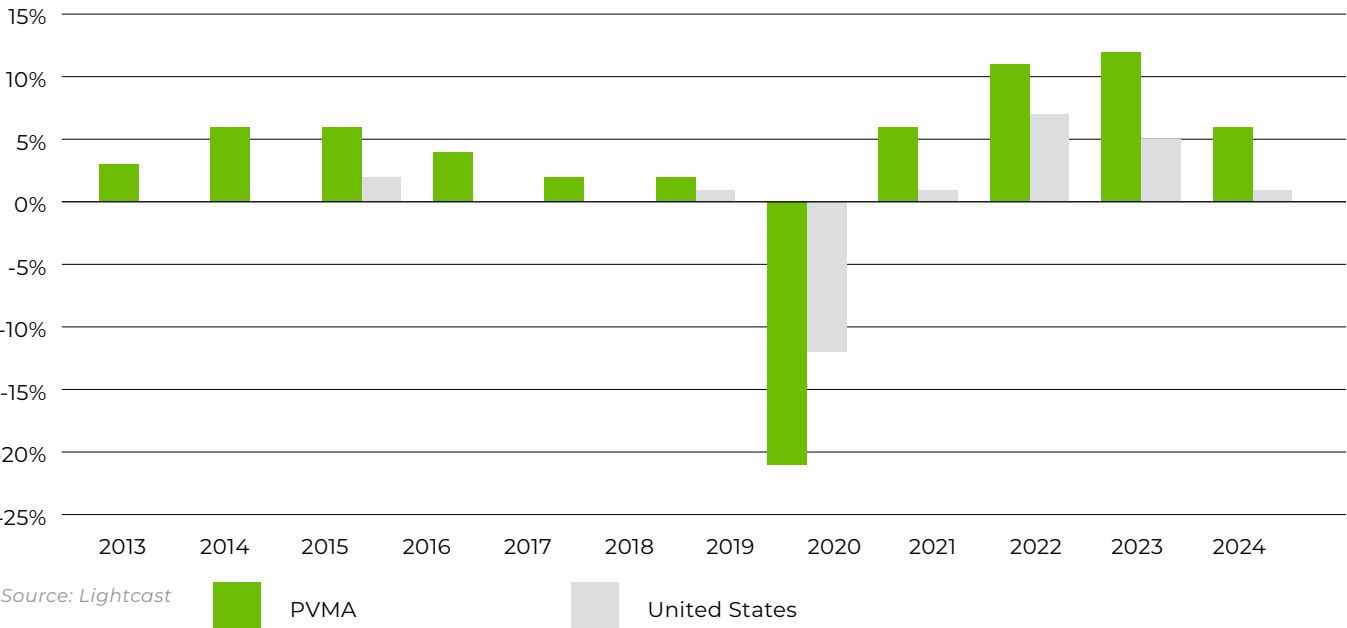
FIGURE 16: EARLY CHILDHOOD EDUCATION JOBS BY COUNTY, PVMA, 2024



Source: Lightcast

Early Childhood Education employment is proportionately distributed across the region; each county's share of the region's sector employment roughly matches its share of total employment.

FIGURE 17: EARLY CHILDHOOD EEDUCATION ANNUAL GROWTH RATES, PVMA VS. UNITED STATES, 2014–2024



Source: Lightcast

Early Childhood Education was hit hard by the COVID-19 pandemic. Between 2019 and 2020, the industry lost nearly 2,000 jobs, a decrease of 21%. The decline was much higher than the nation drop of 12%.

After the losses in 2020, the sector rebounded both regionally and nationally. By 2023, the sector had regained all lost jobs and added an additional 264 jobs. Over the following year, it added another 565 jobs.

TABLE 9: TOP HEALTHCARE AND SOCIAL ASSISTANCE OCCUPATIONS (ALL INDUSTRIES), PVMA, 2024

DESCRIPTION	EMPLOYED IN INDUSTRY (2024)	% OF TOTAL JOBS IN INDUSTRY (2024)	MEDIAN HOURLY EARNINGS	% OF MEDIAN WAGE, ALL OCCUPATIONS	TURNOVER RATE (2024)	TYPICAL ENTRY LEVEL EDUCATION
Education and Childcare Administrators, Preschool and Daycare	895	7.7%	\$27.68	98%	39%	Bachelor's degree
Child, Family, and School Social Workers	129	1.1%	\$31.48	111%	40%	Bachelor's degree
Self-Enrichment Teachers	47	0.4%	\$22.26	78%	40%	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	98	0.8%	\$25.66	90%	42%	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	54	0.5%	\$25.46	90%	42%	Some college, no degree
Instructional Coordinators	55	0.5%	\$39.57	139%	44%	Master's degree
Substitute Teachers, Short-Term	87	0.8%	\$27.14	96%	45%	Bachelor's degree
General and Operations Managers	116	1.0%	\$54.17	191%	46%	Bachelor's degree
First-Line Supervisors of Personal Service Workers	197	1.7%	\$25.47	90%	47%	High school diploma or equivalent
Teaching Assistants, Except Postsecondary	2,016	17.4%	\$19.43	68%	50%	Some college, no degree
Social and Human Service Assistants	83	0.7%	\$23.78	84%	54%	High school diploma or equivalent
Office Clerks, General	106	0.9%	\$23.11	81%	55%	High school diploma or equivalent
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	64	0.6%	\$18.90	67%	59%	No formal educational credential
Preschool Teachers, Except Special Education	3,529	30.4%	\$20.19	71%	64%	Associate's degree
Childcare Workers	3,008	25.9%	\$17.54	62%	68%	High school diploma or equivalent
Home Health and Personal Care Aides	66	0.6%	\$21.10	74%	70%	High school diploma or equivalent
Cooks, Institution and Cafeteria	216	1.9%	\$21.34	75%	80%	No formal educational credential

Source: Lightcast

Note: A separation is recorded when an individual's Social Security number that appeared on a company's payroll is no longer present. By comparing separations to the total number of jobs in an occupation, we can benchmark the level of movement taking place in that occupation.

Early Childhood Education employment is concentrated in three occupations: Preschool Teachers, Childcare Workers, and Teaching Assistants. Together, these occupations account for 74% of all jobs within the sector.

Turnover refers to the change in the workforce due to employee separations and hiring.

Overall, early childhood education has less turnover than the overall economy (56%). Six of the sector's largest occupations do have a higher turnover rate. The occupations with the highest turnover rate is Cooks, Institution and Cafeteria (80%) and Home Health and Personal Care Aides (70%).



TABLE 10: TRAINING AND GRADUATES, EARLY CHILDHOOD EDUCATION RELATED PROGRAMS, PVMA, BY SCHOOL, 2019–2023

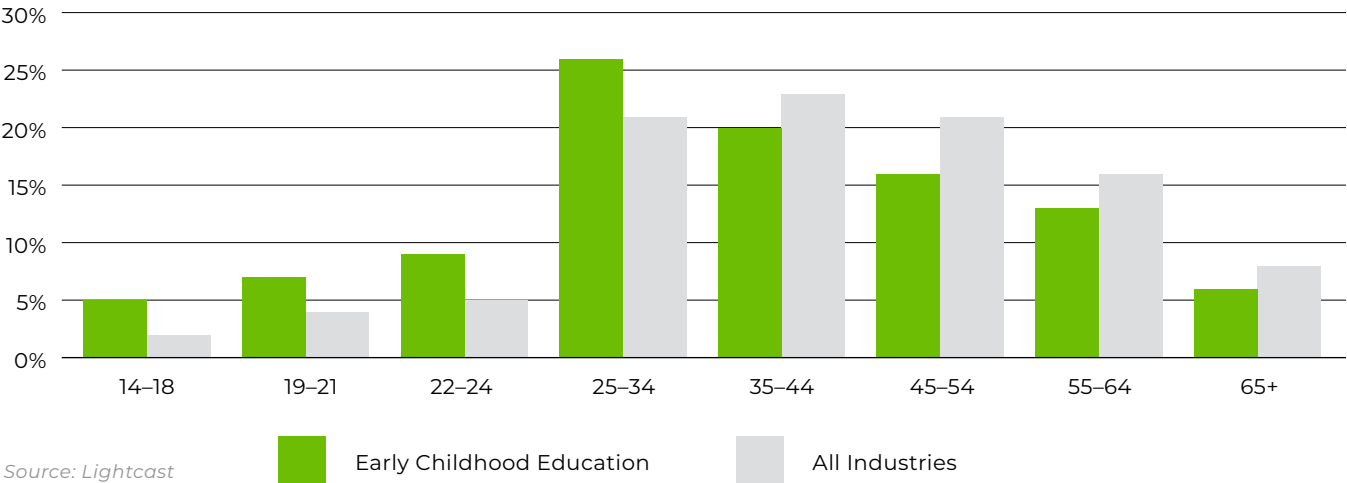
DESCRIPTION	2019	2020	2021	2022	2023
Clark College	19	11	15	11	10
Lower Columbia College	8	6	24	23	58
Mt Hood Community College	12	15	9	18	5
Portland Community College	14	17	9	10	14
Portland State University	26	39	26	27	34
	92	88	83	89	121

Source: Lightcast

Five schools in the PVMA offer training and education programs for early childhood education occupations. Over the past five years, more than 473 people have completed such programs.

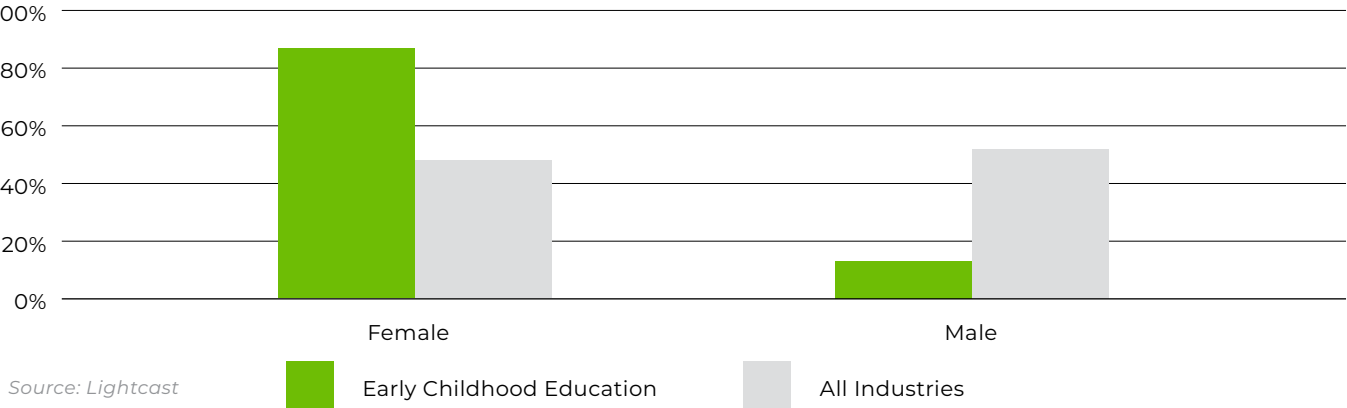
The schools with the largest number of students completing programs in early childhood education is Portland State University.

FIGURE 18: EARLY CHILDHOOD EDUCATION EMPLOYMENT BY AGE, PVMA, 2024



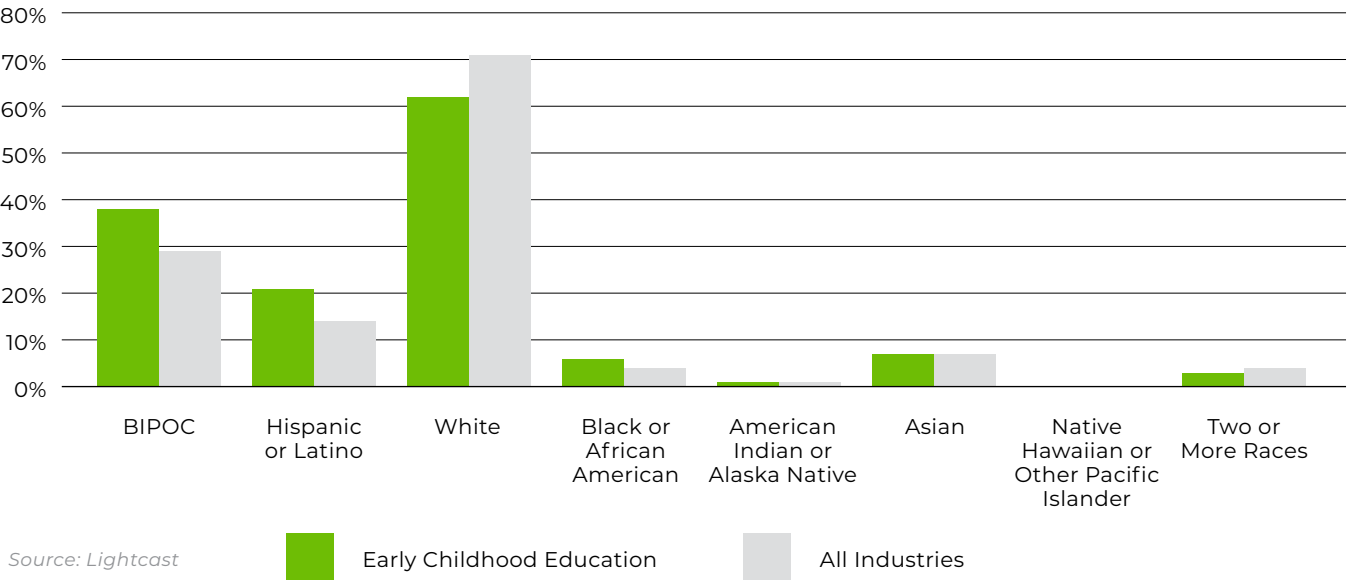
The Early Childhood Education workforce is younger than the overall workforce. In 2024, 46% of early childhood education workers were aged 34 or younger compared to 32% of workers across all industries.

FIGURE 19: EARLY CHILDHOOD EDUCATION EMPLOYMENT BY GENDER, PVMA, 2024



The early childhood education workforce is overwhelmingly female: women outnumber men by three-to-one.

FIGURE 20: EARLY CHILDHOOD EDUCATION EMPLOYMENT BY RACE AND ETHNICITY, PVMA, 2024



There are fewer workers who identify as white employed in the early childhood education workforce (63%), when compared to the total labor force (71%). There are more workers who identify as Hispanic or Latino in early childhood education than the average across all industries.



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