



Industry Spotlight

Total - All Industries

Portland-Vancouver-Hillsboro, OR-WA MSA



Greater Portland Inc
greaterportlandinc.com

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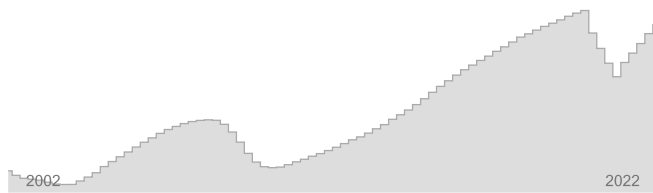
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Spotlight Summary

Total - All Industries

Portland-Vancouver-Hillsboro, OR-WA MSA – 2022Q2

EMPLOYMENT



1,261,629

Regional employment / 158,952,226 in the nation

WAGES

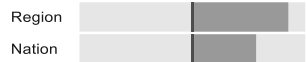


\$72,791

Avg Wages per Worker / \$67,777 in the nation

1.7% ↑

Avg Ann % Change Last 10 Years / +1.2% in the U.S.



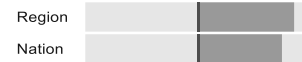
100.0%

% of Total Employment / 100.0% in the U.S.

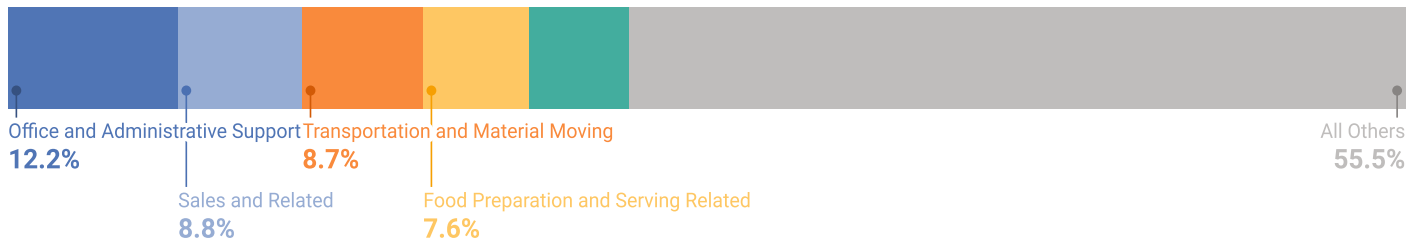


4.1% ↑

Avg Ann % Change Last 10 Years / +3.6% in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

2.2% ↑



Health Care and Social Assistance

0.9% ↑



Manufacturing

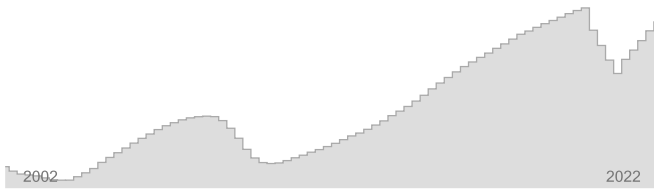
1.1% ↑



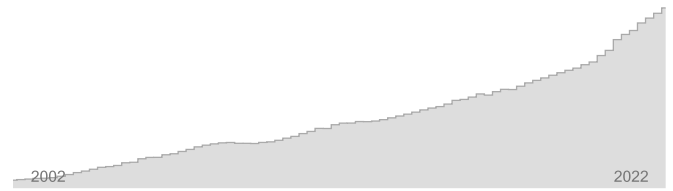
Retail Trade

Industry Snapshot

EMPLOYMENT



WAGES



2-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
Health Care and Social Assistance	170,760	\$63,885	0.94		19,979	2.1%
Manufacturing	126,721	\$94,100	1.24		13,891	0.6%
Retail Trade	120,289	\$39,879	0.94		16,190	0.1%
Educational Services	96,302	\$61,739	0.96		10,282	1.3%
Accommodation and Food Services	95,966	\$29,111	0.91		18,413	2.6%
Professional, Scientific, and Technical Services	95,409	\$99,193	1.04		9,529	1.3%
Construction	86,292	\$75,584	1.15		9,113	1.0%
Administrative and Support and Waste Management and Remediation Services	74,255	\$56,409	0.91		9,595	1.4%
Transportation and Warehousing	61,866	\$59,456	0.99		7,620	1.3%
Wholesale Trade	55,409	\$98,574	1.18		6,217	0.7%
Remaining Component Industries	278,360	\$88,544	1.05		32,015	1.3%
Total - All Industries	1,261,629	\$72,791	1.00		154,041	1.3%

Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

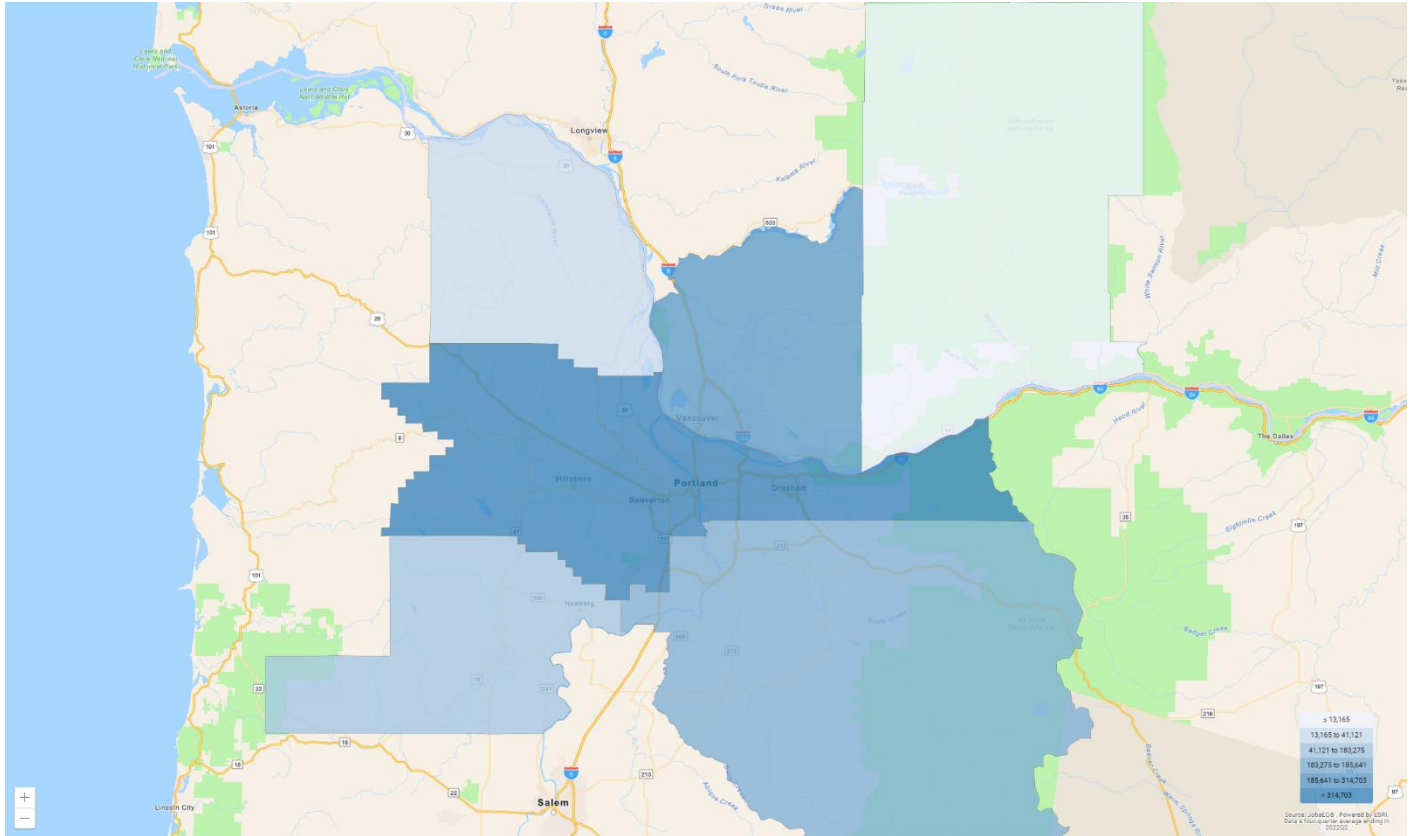
Staffing Pattern



6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Retail Salespersons	30,816	\$35,400	4,547
Fast Food and Counter Workers	30,496	\$31,400	7,406
General and Operations Managers	26,673	\$117,400	2,679
Stockers and Order Fillers	24,250	\$36,100	4,084
Office Clerks, General	23,276	\$42,100	2,755
Cashiers	21,973	\$32,400	3,814
Registered Nurses	20,572	\$101,700	1,402
Personal Care Aides	20,251	\$33,100	3,865
Customer Service Representatives	19,002	\$42,100	2,474
Software Developers	18,092	\$118,800	1,869
Remaining Component Occupations	1,026,227	\$73,300	124,506
Total	1,261,629		

 The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

Geographic Distribution



Region	Empl
Multnomah County, Oregon	521,362
Washington County, Oregon	314,703
Clark County, Washington	185,641
Clackamas County, Oregon	183,276

Region	Empl
Yamhill County, Oregon	41,122
Columbia County, Oregon	13,166
Skamania County, Washington	2,359

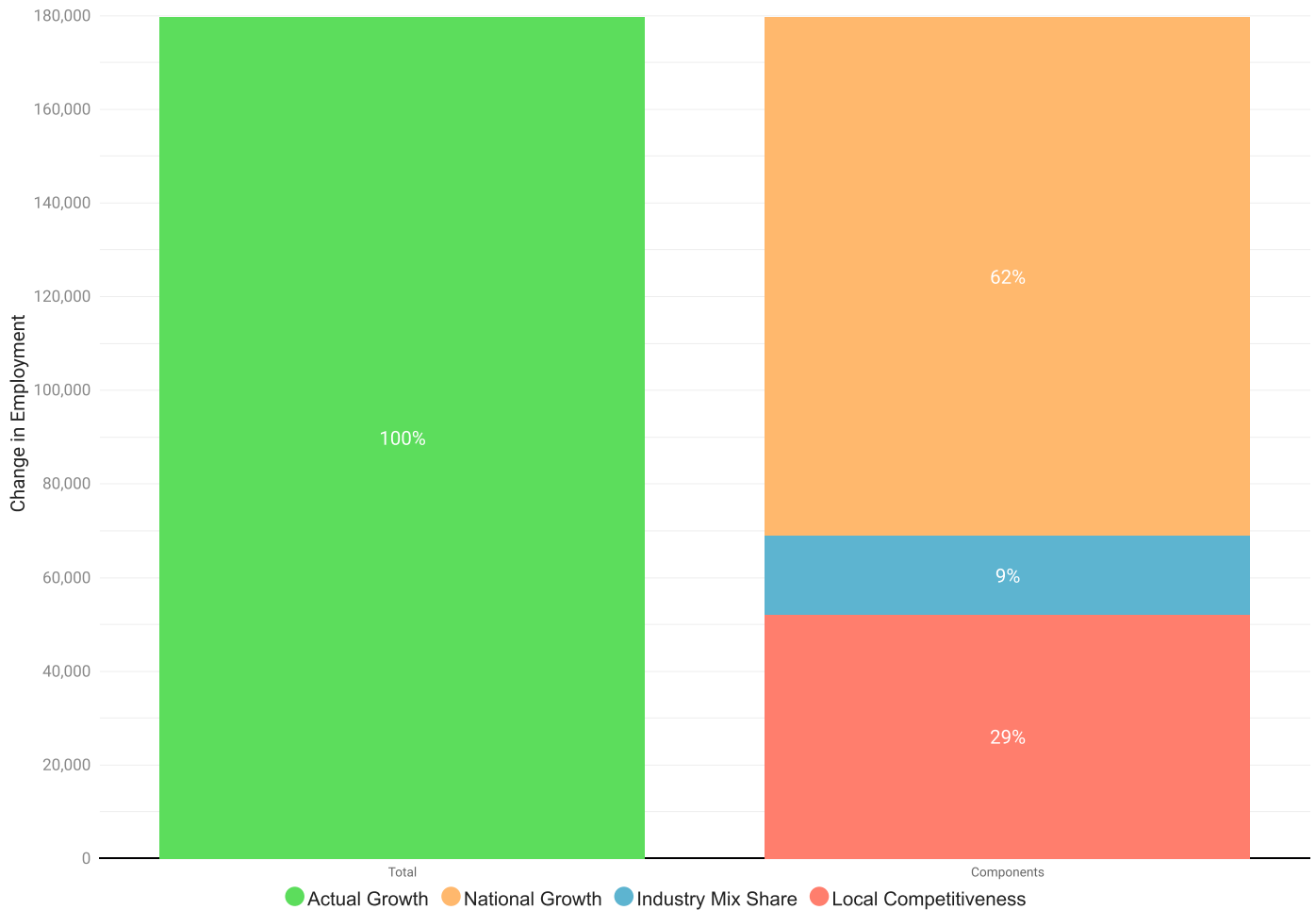
Source: JobsEQ®

 The geographic distribution of industry employment by place of work illustrates the impact on labor force demand and commuting patterns.



Drivers of Employment Growth

Over the ten years ending 2021, employment in Total - All Industries for the Portland-Vancouver-Hillsboro, OR-WA MSA added 179,742 jobs. After adjusting for national growth during this period and industry mix share, the part of this employment change due to local competitiveness was a gain of 52,082 jobs—meaning this industry was more competitive than its national counterpart during this period.

Drivers of Employment Growth for Portland-Vancouver-Hillsboro, OR-WA MSA



Source: JobsEQ®, Data as of 2021Q4

-  Shift-share analysis sheds light on the factors that drive regional employment growth in an industry. A positive change in local competitiveness indicates advantages that may be due to factors such as superior technology, management, and labor pool, etc.
-  National growth is due to the overall growth or contraction in the national economy. Industry mix share is the growth attributable to the specific industries examined (based on national industry growth patterns and the industry mix of the region).

Employment Distribution by Type

The table below shows the employment mix by ownership type for Total - All Industries for the Portland-Vancouver-Hillsboro, OR-WA MSA. Four of these ownership types — federal, state, and local government and the private sector — together constitute “Covered Employment” (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

“Self-Employment” refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



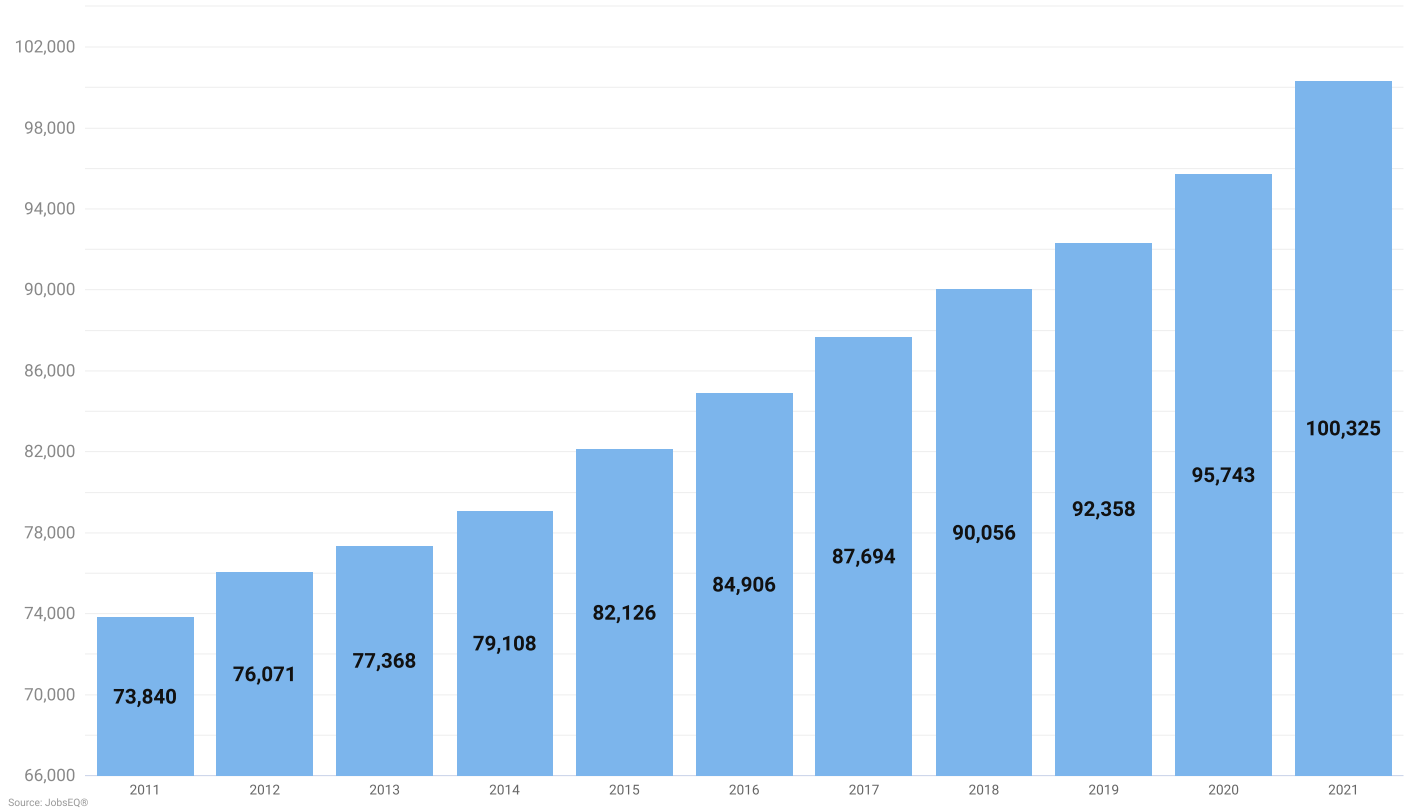
	Empl	%
Private	1,040,973	82.5%
Self-Employment	69,465	5.5%
Local Government	112,730	8.9%
State Government	12,368	1.0%
Federal Government	18,236	1.4%
Other Non-Covered	7,857	0.6%


Source: JobsEQ®

 Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

Establishments

In 2021, there were 100,325 Total - All Industries establishments in the Portland-Vancouver-Hillsboro, OR-WA MSA (per covered employment establishment counts), an increase from 73,840 establishments ten years earlier in 2011.

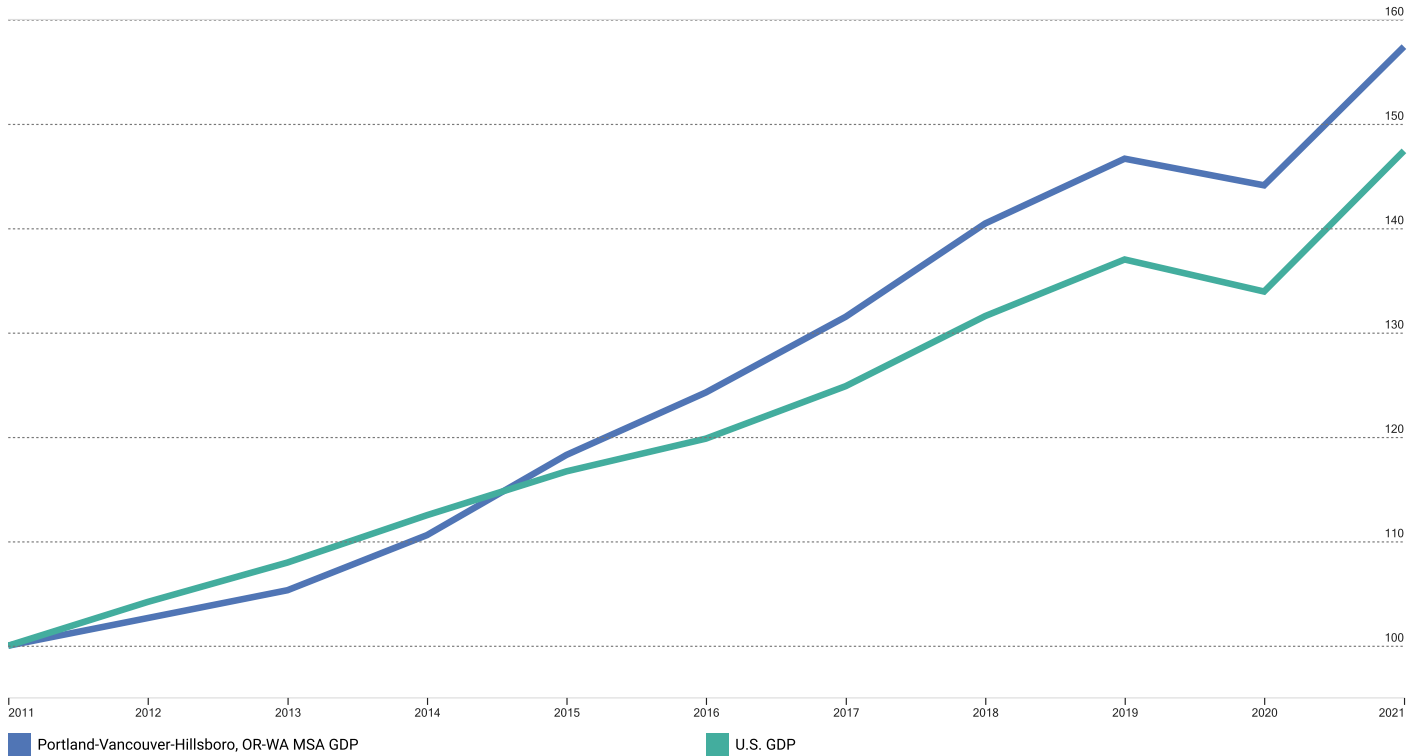


 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

GDP & Productivity

In 2021, Total - All Industries produced \$189 billion in GDP for the Portland-Vancouver-Hillsboro, OR-WA MSA.

GDP: Indexed 2011 = 100



100.0 %

Industry Share of Total GDP /
100.0 % in the nation



4.6 % ↑

Avg Ann % Change Last 10 Yrs /
4.0 % in the nation



\$262k

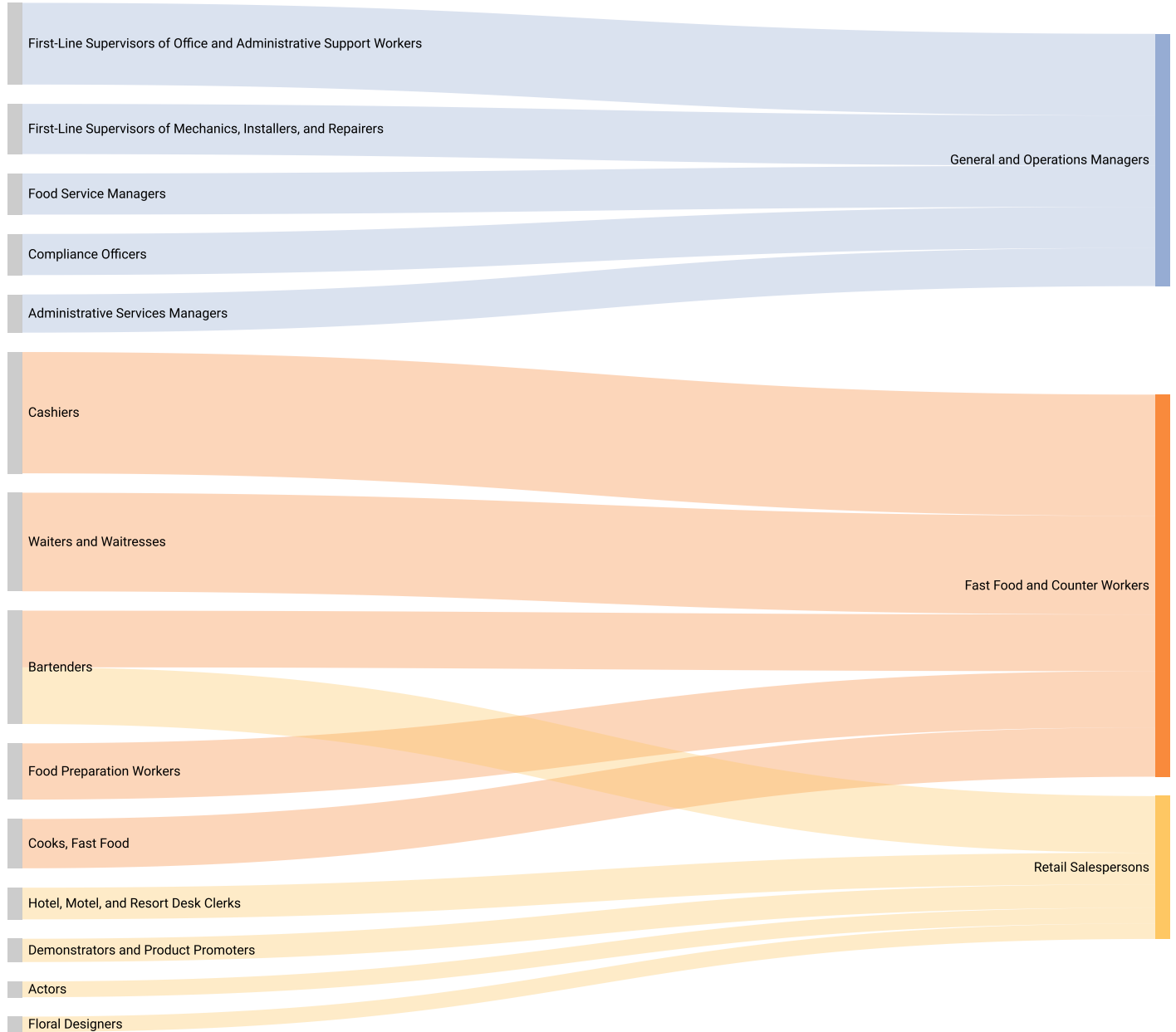
Output per Worker /
\$268k in the nation




💡 Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value-added to a regional economy in the form of labor income, proprietor's income, and business profits, among others. GDP values shown on this page are nominal GDP data.

💡 Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

Sector Strategy Pathways



 The graphics on this page illustrate relationships and potential movement (from left to right) between occupations that share similar skill sets. Developing career pathways as a strategy promotes industry employment growth and workforce engagement.

Postsecondary Programs Linked to Total - All Industries

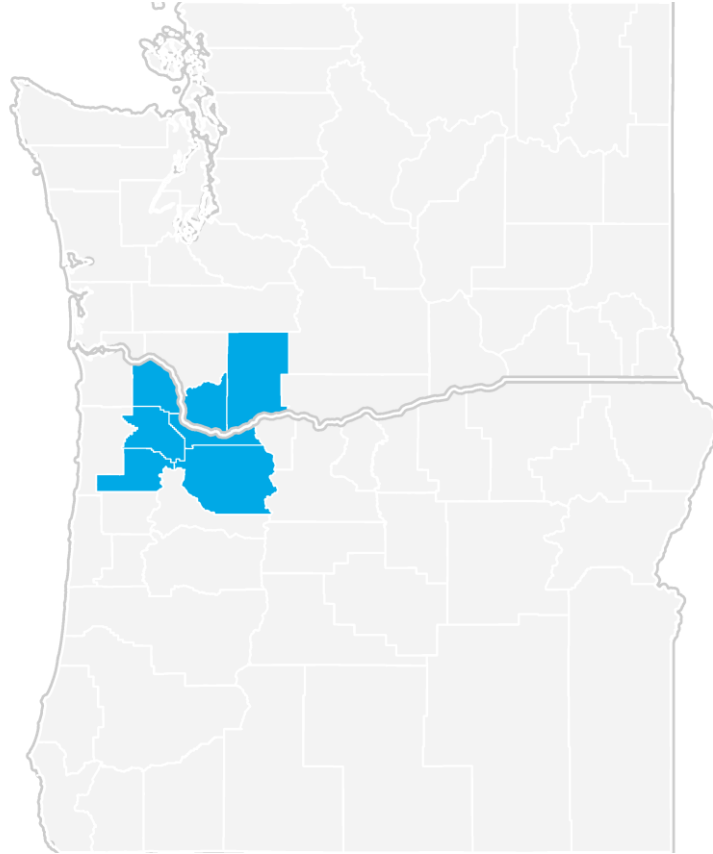
Program	Awards
Charter College	
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	112
Medical/Clinical Assistant	614
International Air and Hospitality Academy	
Mechanical Engineering Related Technologies/Technicians, Other	125
Linfield University-School of Nursing	
Registered Nursing/Registered Nurse	197
Oregon Health & Science University	
Registered Nursing/Registered Nurse	385
Pacific University	
Optometry	88
Portland Community College	
Liberal Arts and Sciences/Liberal Studies	1,642
Portland State University	
Teacher Education and Professional Development, Specific Levels and Methods, Other	381
Sumner College	
Licensed Practical/Vocational Nurse Training	185
University of Western States	
Clinical Nutrition/Nutritionist	148

Source: [JobsEQ®](#)

 The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.

 Among postsecondary programs at schools located in the Portland-Vancouver-Hillsboro, OR-WA MSA, the sampling above identifies those most linked to occupations relevant to Total - All Industries. For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

Portland-Vancouver-Hillsboro, OR-WA MSA Regional Map



Region Definition

Portland-Vancouver-Hillsboro, OR-WA MSA is defined as the following counties:

Clackamas County, Oregon

Columbia County, Oregon

Multnomah County, Oregon

Washington County, Oregon

Yamhill County, Oregon

Clark County, Washington

Skamania County, Washington

Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2022Q2 and are based upon BLS QCEW data, imputed by Chmura where necessary, and supplemented by additional sources including Census ZBP data. Employment forecasts are modeled by Chmura and are consistent with BLS national-level 10-year forecasts.
- Occupation employment is as of 2022Q2 and is based on industry employment and local staffing patterns calculated by Chmura and utilizing BLS OES data. Occupation wages are per the BLS OES data and are as of 2021.
- GDP is derived from BEA data and imputations by Chmura. Productivity (output per worker) is calculated by Chmura using industry employment and wages as well as GDP and BLS output data. Supply chain modeling including purchases by industry are developed by Chmura.
- Postsecondary awards are per the NCES and are for the 2020-2021 academic year.
- Establishment counts are per the BLS QCEW data.
- Figures may not sum due to rounding.

FAQ

What is (LQ) location quotient?

Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is annual demand?

Annual demand is a of the sum of the annual projected growth demand and separation demand. Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. Growth demand is the increase or decrease of jobs expected due to expansion or contraction of the overall number of jobs.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.