



HEALTH CARE

2016

THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE

Working together to support and develop regional talent.



## **ABOUT THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE**

The Columbia-Willamette Workforce Collaborative (Collaborative) is a partnership between the Clackamas Workforce Partnership, Workforce Southwest Washington (formerly Southwest Washington Workforce Development Council) 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 THIS REPORT**

The Collaborative is focused on aligning and investing resources to support the workforce needs of four sectors: Advanced Manufacturing, Health Care, Software/IT, and Construction. Sectors are chosen based on factors such as their economic significance to the region, current number of openings and job growth projections, average 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 are able to better understand industry trends, identify current and emergent workforce needs, and develop customized solutions for each sector.

## **ACKNOWLEDGEMENTS**

Much of the data in this report was provided by the Oregon Employment Department and the Washington Employment Security Department, key partners in the region's workforce development system. The Collaborative is dedicated to assuring this information is regularly updated and presented in a way that advances the region's capacity to understand and align regional workforce supply with business demand in key industry sectors.

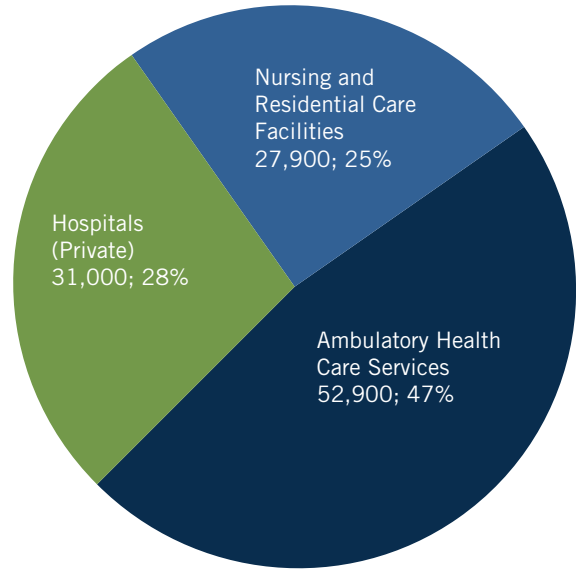
## OVERVIEW

With more than 110,000 jobs and a payroll of \$5.9 billion, Health Care accounts for 12 percent of both the greater Portland region's private-sector employment and payroll.

The Health Care sector contributed approximately \$8.2 billion to the metro area's Gross Domestic Product in 2013; 5.5 percent of all output.

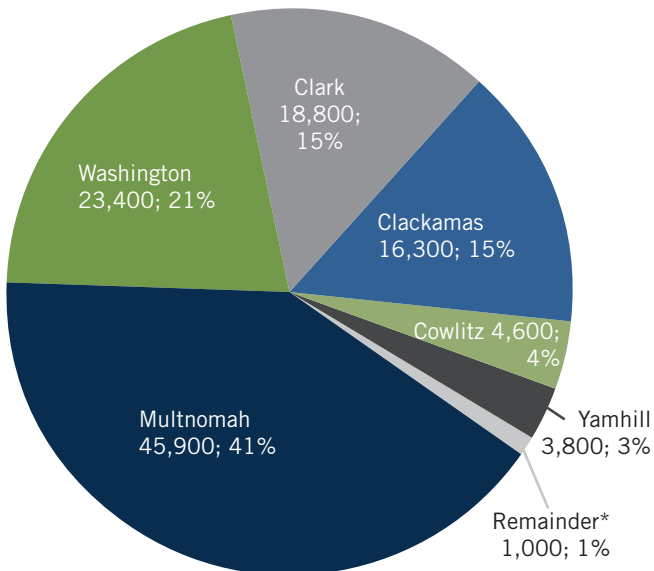
The Health Care sector includes hospitals; offices of physicians, dentists and other health care providers; outpatient health clinics (i.e. ambulatory care); and nursing and residential care facilities.

### HEALTH CARE EMPLOYMENT BY COMPONENT GREATER PORTLAND REGION: 2015



Source: EMSI

### HEALTH CARE JOBS BY COUNTY GREATER PORTLAND REGION: 2015



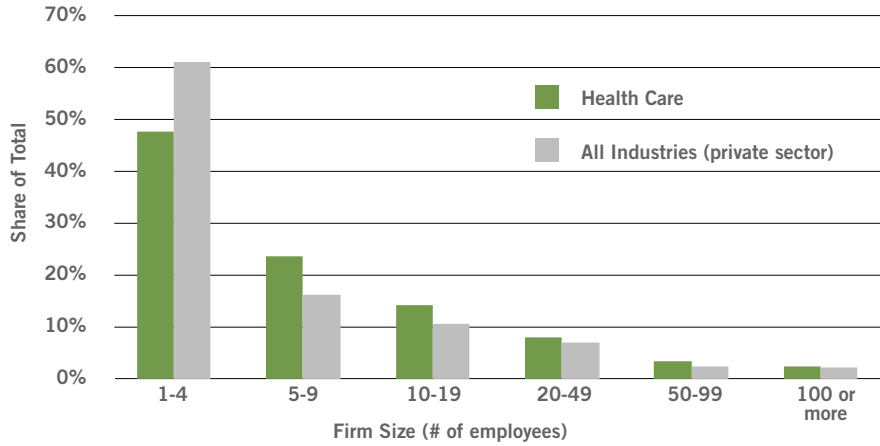
Source: EMSI

\*Columbia, Skamania, Wahkiakum

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

## FIRM CHARACTERISTICS

**FIRMS BY SIZE CLASS: HEALTH CARE  
GREATER PORTLAND REGION: 2015**



Source: Oregon Employment Department, Washington Employment Security Department

There are roughly 5,000 Health Care establishments in the region.

The average size of a Health Care firm is slightly larger than the average for all firms: 14 employees versus 12 overall.

Half of the region's Health Care employment is in establishments employing more than 100 people.

The vast majority of Health Care establishments are smaller offices of health care professionals. However, more than one-quarter of employment is found in the region's major hospitals.

## MAJOR EMPLOYERS

Ambulatory Care
Diabetes and Nutrition Center
Oregon Anesthesiology Center
Oregon Hematology Oncology Assoc.
The Oregon Clinic
Tuality Healthcare
The Vancouver Clinic

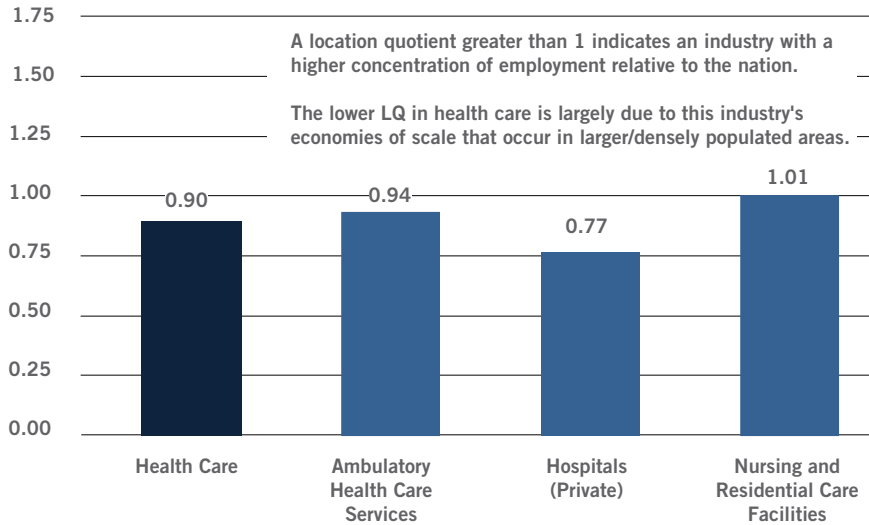
Hospitals
Adventist Health
Kaiser Permanente
Legacy Health
Lower Columbia Mental Health
PeaceHealth
Providence Health & Services

Nursing and Residential Care
CDM Caregiving Services
Marquis Care
Mary's Woods at Marylhurst
Robison Jewish Home
Trillium Family Services
Willamette View Health Center

Source: Equifax (EMSI), The Business Journal, The Oregonian

# CONCENTRATION

## LOCATION QUOTIENTS HEALTH CARE AND COMPONENTS GREATER PORTLAND REGION: 2014



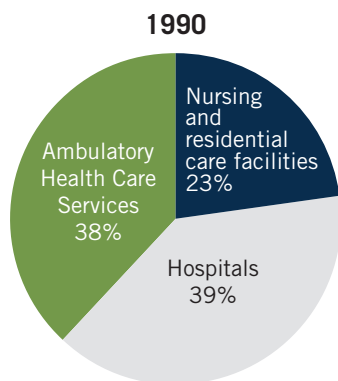
Location quotients are used to measure a sector's employment concentration in an area. A number greater than one indicates a higher concentration of employment relative to the nation.

Health Care employment is slightly less concentrated in the Portland region compared to the nation. This is largely due to economies of scale that occur in densely populated areas.

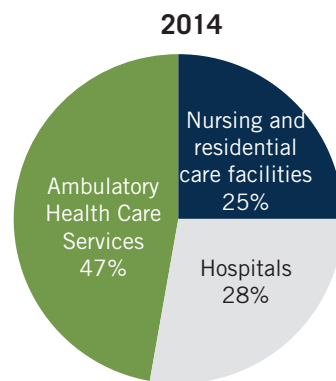
Source: Oregon Employment Dept.; Washington Employment Security Dept., U.S. Bureau of Labor Statistics

# SHIFTS IN HEALTH CARE DELIVERY

The landscape of health care has changed over the past few decades, reflecting a shift in the way services are delivered. Ambulatory health care is growing rapidly, and consequently representing a greater share of employment. More people are turning to doctors' offices and clinics (outpatient services) for health care. This trend will likely continue as a result 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.



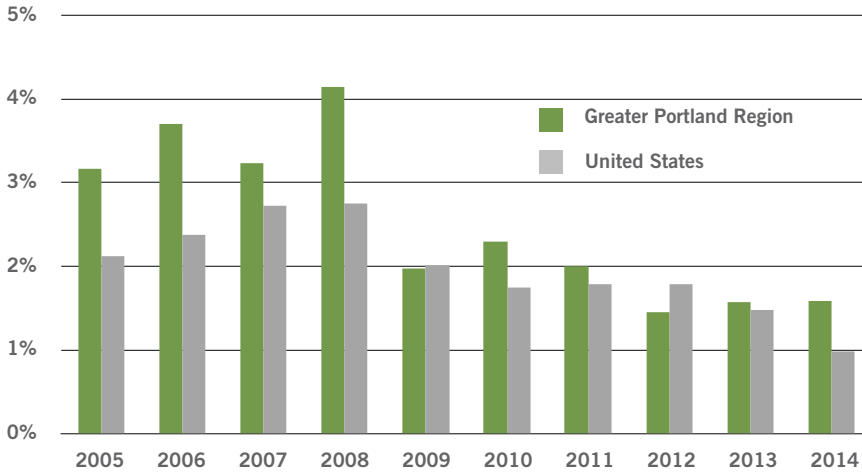
Source: Oregon Employment Dept., Washington Employment Security Department



Source: Oregon Employment Dept., Washington Employment Security Department

## EMPLOYMENT TRENDS

**HEALTH CARE ANNUAL GROWTH RATES  
GREATER PORTLAND REGION VS. UNITED STATES**



Source: EMSI

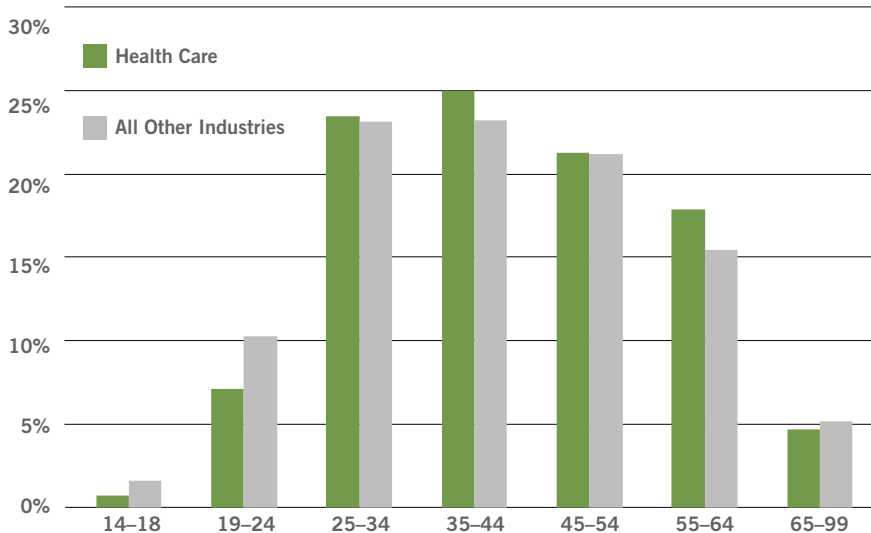
Health Care is a key driver of employment growth at both the national and local level.

Health Care added jobs throughout the recession, nationally and locally; the only major industry to do so.

The Portland region's Health Care sector outperformed national growth between 2004 and 2014. It grew 2.4 times faster than the overall economy between 2004 and 2014, led by the ambulatory care component (e.g. doctors' offices). It also accounted for roughly 11% of employment yet 25% of net growth (2004-2014).

## CHARACTERISTICS OF THE WORKFORCE

**HEALTH CARE EMPLOYMENT BY AGE  
GREATER PORTLAND REGION: 2014**



Source: U.S. Census Bureau; Longitudinal Employer-Household Dynamics

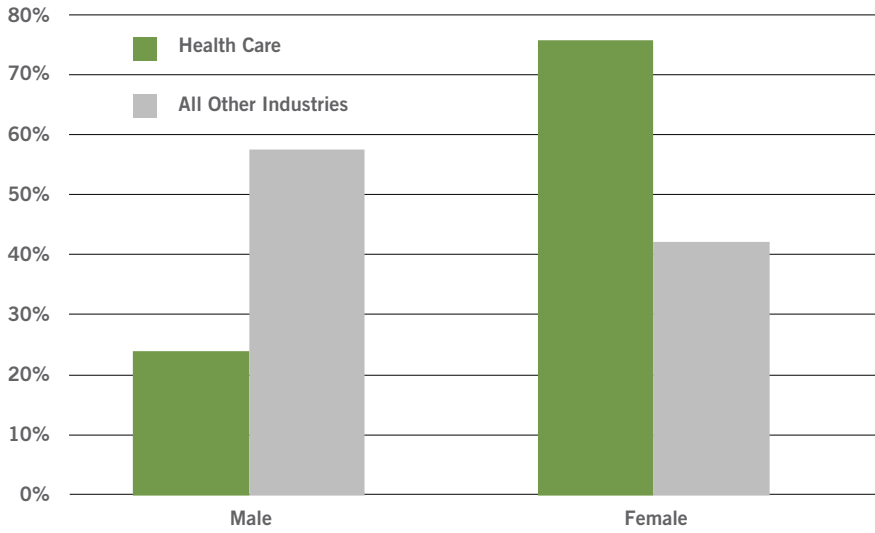
Nearly one-quarter of the region's Health Care workforce is at, or nearing, retirement age.

Due in part to the aging workforce, area employers have identified leadership training as a key industry need.

Nationally, the median age for Registered Nurses is 44.2; about two years older than the median age across all occupations.

Dentists (48.7 years), Respiratory Therapists (48.0), Dietitians and Nutritionists (45.5), and Nurse Practitioners (45.3) also have a relatively older workforce.

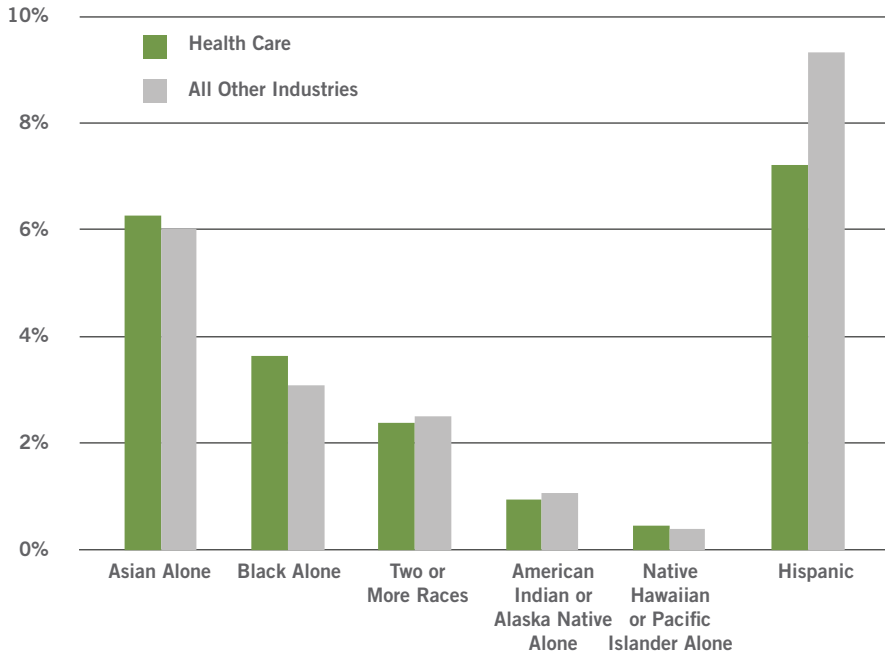
**HEALTH CARE EMPLOYMENT BY GENDER  
GREATER PORTLAND REGION: 2014**



The Health Care workforce is overwhelmingly female: women outnumber men by more than three-to-one.

Source: U.S. Census Bureau; Longitudinal Employer-Household Dynamics

**HEALTH CARE EMPLOYMENT BY RACE (NONWHITE) AND ETHNICITY  
GREATER PORTLAND REGION: 2014**



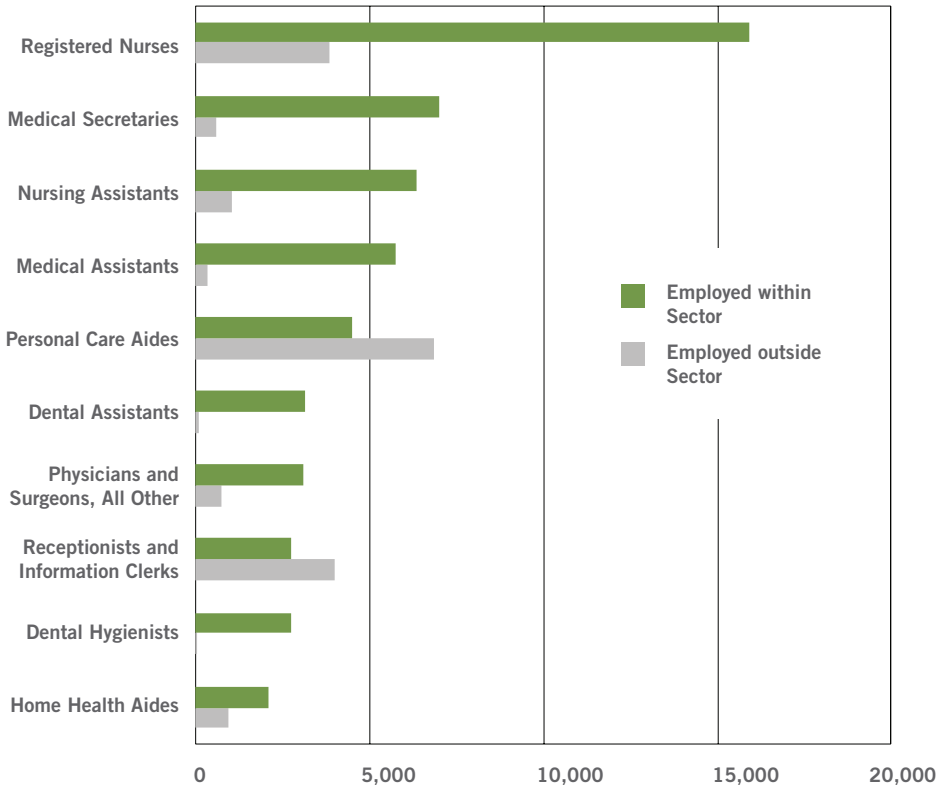
Whites make up the vast majority of the Health Care workforce (86%); about the same as the workforce as a whole.

The workforce has more Blacks and fewer Hispanics than the average across all industries.

Source: U.S. Census Bureau; Longitudinal Employer-Household Dynamics

# OCCUPATIONS

**TOP 10 HEALTH CARE SECTOR OCCUPATIONS  
EMPLOYMENT WITHIN SECTOR VS. OUTSIDE OF SECTOR: 2015**



Source: EMSI

More than 400 occupations are found in the Health Care Sector.

Eight of the 10 largest occupations are unique to the sector and not usually found elsewhere in the economy.

Roughly three out of five workers are directly involved in patient care.

Office and administrative occupations are the third largest group; 17 percent of sector employment.

**TOP HEALTH CARE OCCUPATIONS (ALL INDUSTRIES): GREATER PORTLAND REGION**

Occupation	2014 Employment	2024 Employment	Estimated Annual Openings Due to Growth
Registered Nurses	19,239	22,417	318
Personal Care Aides	10,847	14,814	397
Medical Secretaries	7,381	9,204	182
Nursing Assistants	7,142	8,980	184
Receptionists and Information Clerks	6,558	7,828	127
Medical Assistants	5,889	7,219	133
Dental Assistants	3,168	3,664	50
Physicians and Surgeons, All Other	3,827	4,345	52
Home Health Aides	2,870	4,328	146
Dental Hygienists	2,690	3,212	52

Source: EMSI



## TOP HEALTH CARE OCCUPATIONS (SECTOR): GREATER PORTLAND REGION

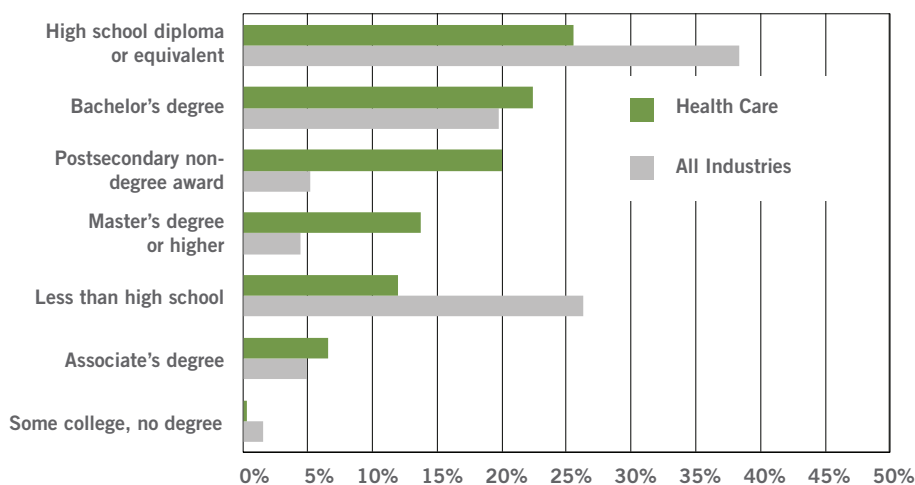
Occupation	2014 Sector Employment*	% of Sector Employment	2014 Median Wage*	% of Median Wage, All Occupations*	Location Quotient*	Typical Entry Level Education
Registered Nurses	15,464	13.8%	\$41.53	220.0%	0.89	Bachelor's degree
Medical Secretaries	6,772	6.1%	\$17.41	92.2%	1.84	High school diploma or equivalent
Nursing Assistants	6,131	5.5%	\$13.45	71.2%	0.58	Postsecondary non-degree award
Medical Assistants	5,550	5.0%	\$16.91	89.6%	1.26	Postsecondary non-degree award
Personal Care Aides	4,332	3.9%	\$10.93	57.9%	0.81	Less than high school
Physicians and Surgeons, All Other	3,068	2.7%	\$96.77	512.6%	1.57	Doctoral or professional degree
Dental Assistants	3,050	2.7%	\$19.71	104.4%	1.21	Postsecondary non-degree award
Receptionists and Information Clerks	2,644	2.4%	\$13.49	71.5%	0.82	High school diploma or equivalent
Dental Hygienists	2,634	2.4%	\$36.16	191.5%	1.70	Associate's degree
Home Health Aides	1,990	1.8%	\$11.11	58.8%	0.39	Less than high school

\*7-county metro area, all industries Source: EMSI; Bureau of Labor Statistics

The top 10 occupations make up nearly half of all employment.

## EDUCATIONAL REQUIREMENTS

### HEALTH CARE EMPLOYMENT BY TYPICAL ENTRY-LEVEL EDUCATION GREATER PORTLAND REGION: 2015



Four out of every 10 jobs in Health Care require an Associate's degree or higher; a significantly greater proportion than for all other industries (29%).

Four of the 10 largest occupations require a high school diploma or less.

Source: EMSI

**TRAINING AND DEGREE GRADUATE COMPLETER DATA FOR HEALTH CARE-RELATED PROGRAMS: GREATER PORTLAND REGION**

Training	2013 Completers	Type of Credential Granted						Doctorate
		Award less than 2 years	Award at least 2 and less than 4	Associate's	Bachelor's	Postbac. Certificate	Master's	
Clinical Nurse Leader	12						12	
Community Health and Preventive Medicine	146				146			
Dental Assisting/Assistant	294	288		6				
Dental Hygiene/Hygienist	152			121	31			
Family Practice Nurse/Nursing	21						21	
General Office Occupations and Clerical Services	154	154						
Geriatric Nurse/Nursing	2							2
Health Information/Medical Records Technology/Technician	47	19		28				
Health Services Administration	5						5	
Health Services/Allied Health/Health Sciences, General	6				6			
Health/Health Care Administration/Management	199			46	66	23	64	
Hospital and Health Care Facilities Administration/Management	6				6			
Licensed Practical/Vocational Nurse Training	267	267						
Medical Administrative/Executive Assistant and Medical Secretary	119	40		79				
Medical Insurance Coding Specialist/Coder	163	163						
Medical Insurance Specialist/Medical Biller	64	26		38				
Medical Office Assistant/Specialist	39	39						
Medical Reception/Receptionist	39	39						
Medical/Clinical Assistant	1,238	976	49	213				
Medicine	118							118
Nursing Assistant/Aide and Patient Care Assistant/Aide	234	234						
Nursing Practice	18							18

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Training	2013 Completers	Award less than 2 years	Award at least 2 and less than 4	Associate's	Bachelor's	Postbac. Certificate	Master's	Post-Masters Cert.	Doctorate
Ophthalmic and Optometric Support Services and Allied Professions, Other	5				5				
Ophthalmic Technician/Technologist	15			15					
Physical Therapy/Therapist	43								43
Practical Nursing, Vocational Nursing and Nursing Assistants, Other	140	140							
Pre-Nursing Studies	1			1					
Psychiatric/Mental Health Nurse/Nursing	14						11	3	
Public Health, General	33					3	30		
Public Health, Other	129				129				
Receptionist	5	5							
Registered Nursing/Registered Nurse	1,381	9		416	951				5

Source: EMSI

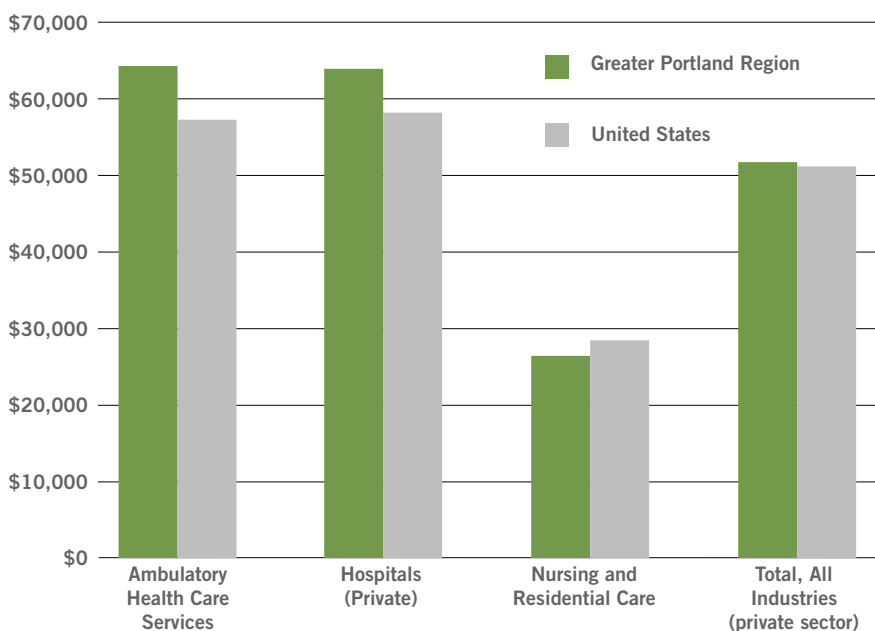
## KNOWLEDGE, SKILLS, AND ABILITIES MOST PREVALENT IN THE TOP 10 HEALTH CARE OCCUPATIONS

Knowledge	Skills	Ability
Customer and Personal Service	Active Listening	Deductive Reasoning
English Language	Critical Thinking	Near Vision
Psychology	Social Perceptiveness	Oral Expression
Medicine and Dentistry	Speaking	Speech Clarity
Education and Training	Service Orientation	Oral Comprehension
Administration and Management	Coordination	Speech Recognition
Computers and Electronics	Monitoring	Written Comprehension
Public Safety and Security	Reading Comprehension	Problem Sensitivity
Therapy and Counseling	Writing	Inductive Reasoning
Biology	Active Learning	Information Ordering

Source: O\*Net, prepared by Oregon Employment Dept.

## WAGES

### ANNUAL AVERAGE WAGES FOR COMPONENTS OF HEALTH CARE, GREATER PORTLAND REGION AND U.S.: 2014



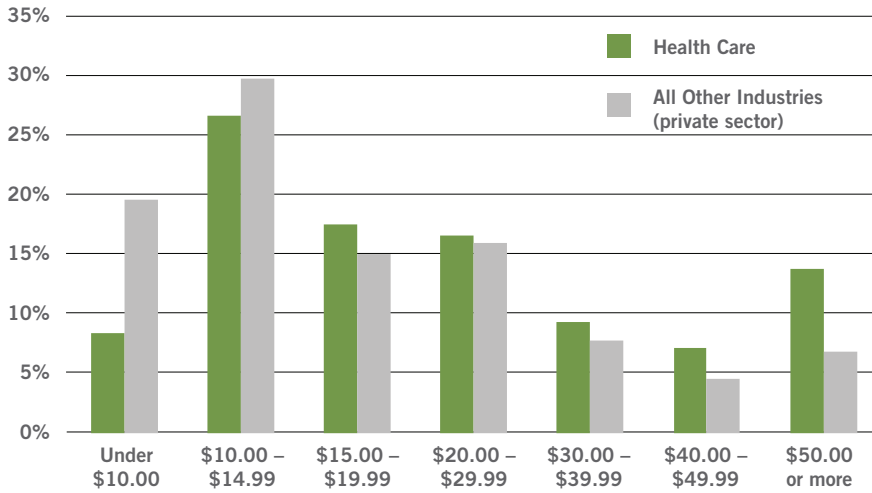
Source: Oregon Employment Department, Washington Employment Security Department

The average annual wage for Health Care is \$54,869 which is 6 percent higher than the average across all industries in the region and 7 percent higher than its national counterpart.

Wages in the nursing and residential care component are lower than average due in part to the prevalence of low-paying occupations: the four largest occupations, which comprise nearly half of total employment, pay under \$14 per hour.

Nationally, this component has more part-time employment than other areas of Health Care and the overall economy, further pulling down average annual wages for this sector.

**HEALTH CARE  
SHARE OF EMPLOYMENT BY HOURLY WAGE  
OREGON: 2014**



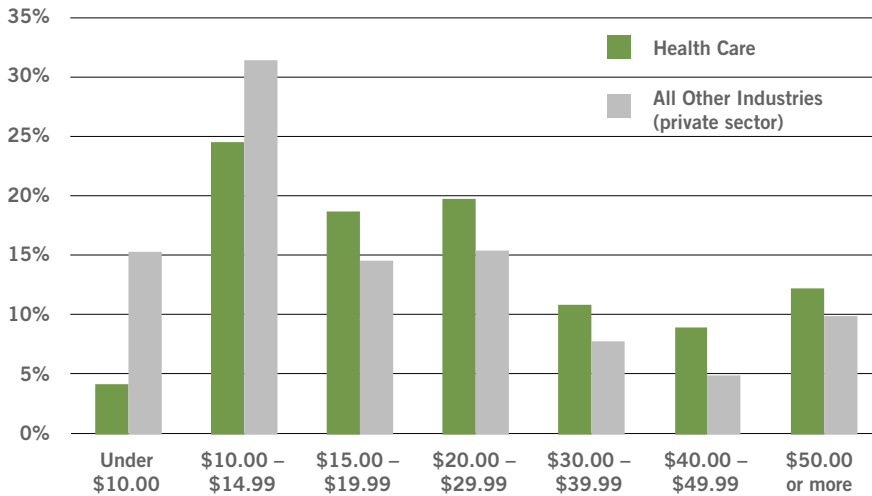
Source: Oregon Employment Department. Unemployment Insurance Wage Records

In Oregon, Health Care’s median hourly wage is \$18.98 (2014); 23 percent higher than that of all industries (\$15.40).

Overall, there are relatively fewer lower-paying jobs and more higher-paying jobs than the rest of the economy.

Nearly half of all jobs pay \$20/ hour or more.

**HEALTH CARE  
SHARE OF EMPLOYMENT BY HOURLY WAGE  
WASHINGTON: 2014**



Source: Washington Employment Security Department

Trends are similar in Washington, with nearly half of the Health Care workforce earning \$20/hour or more. And as with Oregon, higher-paying jobs comprise a greater share of the industry compared to the rest of the economy.

## TURNOVER

### TURNOVER RATE IN HEALTH CARE GREATER PORTLAND REGION: 2014

<b>Total, Health Care</b>	<b>7.3%</b>
<b>Ambulatory Health Care Services</b>	7.3%
<b>Hospitals (Private)</b>	4.2%
<b>Nursing and Residential Care Facilities</b>	11.2%
<b>Total, All Industries (private sector)</b>	<b>9.5%</b>

Source: Oregon Employment Dept. analysis of U.S. Census Bureau (LEHD) data

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

Overall, Health Care has less turnover than the overall economy. The exception is long-term care workers at 11.2 percent, which is significantly higher than economy-wide turnover rate of 9.5 percent. 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.

Hospital workers are more likely to stay at their current jobs, while nursing and residential care workers have a significantly higher rate of turnover.

## VACANCIES

### LARGEST NUMBER OF VACANCIES IN HEALTH CARE-RELATED OCCUPATIONS PORTLAND TRI-COUNTY: 2015

Occupation	2015 Vacancies, All Industries
Personal Care Aides	536
Receptionists and Information Clerks	381
Nursing Assistants	353
Registered Nurses	256
Social and Human Service Assistants	241
Medical Assistants	230
Dental Assistants	227
Food Servers, Nonrestaurant	87
Health Care Support Workers, All Other	78
Nurse Practitioners	64

Tri-County: Clackamas, Multnomah, Washington counties

NOTE: Information not available for SW Washington

Source: Oregon Employment Department, 2015 Job Vacancy Survey

## CURRENT SUPPLY

### REGISTERED JOBSEEKERS HEALTH CARE: PORTLAND METRO AREA (OREGON PORTION): AUGUST 2015

Occupation	Jobseekers <sup>1</sup>
Personal Care Aides	1,386
Nursing Assistants	666
Medical Secretaries	1,246
Medical Records and Health Information Technicians	796
Dental Hygienists	37
Licensed Practical and Licensed Vocational Nurses	79
Registered Nurses	185
Home Health Aides	1,211
Dental Assistants	171
Medical Assistants	643

<sup>1</sup> Data represents jobseekers registered with the Oregon Employment Department, iMatchSkills (active status, August 2015). Data is self-reported. Job seekers can include more than one occupation in their IMS profile, so job seekers might be counted more than once in the data.

Portland Metro Area (Oregon portion): Clackamas, Columbia, Multnomah, Washington, Yamhill counties

NOTE: Information not available for SW Washington

Source: Oregon Employment Department

There are several ways to depict the current supply of workers. Unemployment Insurance (UI) claimants are a subset of jobseekers and does not include those unemployed workers who don't qualify for, or have exhausted, benefits. This data is only available in Washington State. Persons registered with the Oregon Employment Department are both employed and unemployed jobseekers including but not limited to those receiving unemployment benefits. This is a much larger pool of workers than UI claimants.

### UNEMPLOYMENT INSURANCE CLAIMANTS SOUTHWEST WASHINGTON: AUGUST 2015

Occupation	Claimants <sup>1</sup>
Personal and Home Care Aides	79
Nursing Aides, Orderlies, and Attendants	14
Medical Secretaries	17
Medical Records and Health Information Technicians	4
Dental Hygienists	2
Licensed Practical and Licensed Vocational Nurses	1
Registered Nurses	13
Home Health Aides	6
Dental Assistants	7
Medical Assistants	14

<sup>1</sup> Data represents claimants registered with the Washington Employment Security Department (active status, August 2015).

Southwest Washington: Clark, Cowlitz, Wahkiakum, Skamania counties

Source: Washington Employment Security Department

In Southwest Washington, there were 157 unemployed workers claiming unemployment insurance in Health Care's 10 largest occupations (August 2015).

Half of the claimants worked as personal and home care aides.

## CURRENT DEMAND

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### HEALTH CARE-RELATED OCCUPATIONS WITH LARGEST NUMBER OF HELP-WANTED ONLINE (HWOL) LISTINGS GREATER PORTLAND REGION: SUMMER 2015

Occupation	HWOL Ads- All Industries
<b>Registered Nurses</b>	<b>2,212</b>
Registered Nurses	2,007
Critical Care Nurses	154
Advanced Practice Psychiatric Nurses	33
Clinical Nurse Specialists	14
<b>Medical and Health Services Managers</b>	<b>576</b>
<b>Medical Assistants</b>	<b>385</b>
<b>Nursing Assistants</b>	<b>330</b>
<b>Social and Human Service Assistants</b>	<b>784</b>
<b>Personal Care Aides</b>	<b>442</b>
<b>Medical Secretaries</b>	<b>347</b>
<b>Computer Systems Analysts</b>	<b>893</b>
Computer Systems Analysts	865
Informatics Nurse Specialists	29
<b>Network and Computer Systems Administrators</b>	<b>131</b>
<b>Licensed Practical and Licensed Vocational Nurses</b>	<b>211</b>

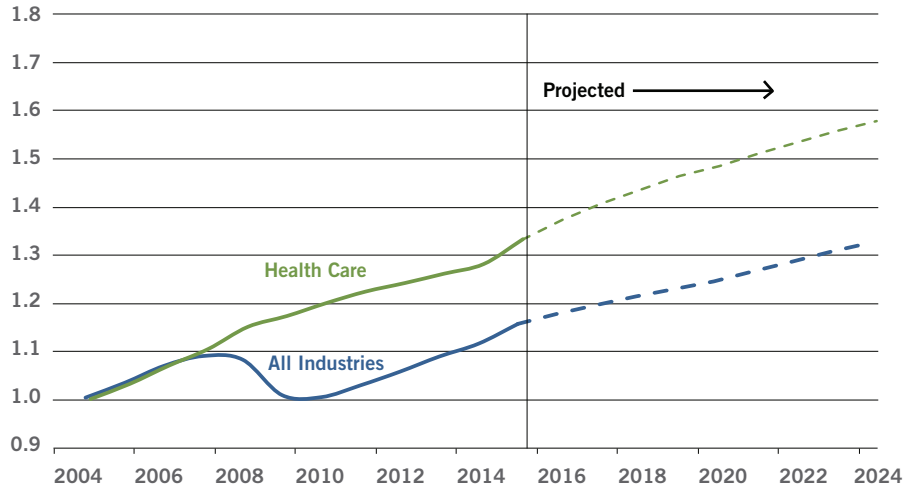
Data includes ads across all industries and from all sources (the firm itself, staffing agency ads, Oregon Employment Department job listings, etc.), and is adjusted for duplications.

*Source: The Conference Board, Help-Wanted OnLine (HWOL) data series*



## LONG-TERM DEMAND

**HISTORICAL AND PROJECTED GROWTH  
GREATER PORTLAND REGION**  
*2004 Indexed to 1*



The Health Care sector is projected to grow 23 percent by 2024 (+25,000 jobs); faster than the overall economy (+19%).

The greatest number of new jobs will be in Multnomah County while Washington County will grow the fastest.

Health Care will account for one-in-seven new jobs across the region between 2014 and 2024.

Growth will be driven by:

- An expanding population: the greater Portland region is expected to add 325,000 new residents between 2015 and 2025 (700,000 by 2040).
- An aging population: the 65+ age group will grow six times faster than the rest of the population between 2015 and 2025 (48% vs. 9%).
- Longer life expectancies and new treatments and technologies.

**HEALTH CARE OCCUPATIONS ADDING THE LARGEST NUMBER OF JOBS  
GREATER PORTLAND REGION**

Occupation	2014	2024	Growth Openings	Percent Growth	Share of Sector Growth	Projected Annual Growth Openings
Registered Nurses	15,464	18,115	2,652	17%	11%	265
Medical Secretaries	6,772	8,467	1,695	25%	7%	170
Nursing Assistants	6,131	7,691	1,560	25%	6%	156
Medical Assistants	5,550	6,831	1,281	23%	5%	128
Personal Care Aides	4,332	5,461	1,129	26%	5%	113
Home Health Aides	1,990	2,844	855	43%	3%	85
Receptionists and Information Clerks	2,644	3,421	778	29%	3%	78
Licensed Practical and Licensed Vocational Nurses	1,471	2,054	583	40%	2%	58
Dental Hygienists	2,634	3,148	514	20%	2%	51
Physicians and Surgeons, All Other	3,068	3,567	499	16%	2%	50
Dental Assistants	3,050	3,532	482	16%	2%	48
Massage Therapists	843	1,302	459	54%	2%	46
Food Servers, Nonrestaurant	962	1,320	358	37%	1%	36
Medical and Health Services Managers	1,773	2,127	354	20%	1%	35
Physical Therapists	1,299	1,646	347	27%	1%	35
<b>Total Sector</b>	<b>107,512</b>	<b>132,505</b>	<b>24,993</b>	<b>23%</b>		<b>2,499</b>

Source: EMSI

- Home health aides will be the fastest-growing large occupation, outpacing the sector nearly two-to-one.
- Registered Nurses will add the largest number of jobs, accounting for 10 percent of the sector's growth.

Much of the growth in these two occupations will be the result of increased demand for health care services as the expanding elderly population requires more care.

## IMPORTING TALENT

The H-1B Visa program allows employers to temporarily employ foreign workers in specialty occupations which include engineering, math and medicine. Jobs filled by H-1B visa workers typically require a Bachelor's degree or higher.

### H-1B VISAS FOR HEALTH CARE-RELATED OCCUPATIONS, GREATER PORTLAND: 2014

Occupation	Multnomah	Clackamas	Washington	Yamhill	Clark	Cowlitz	TOTAL
Physicians and Surgeons	19	0	0	0	4	0	23
Internists, General	1	0	1	0	4	3	9
Physical Therapists	7	0	0	0	1	0	8
Dentists, General	3	0	1	1	1	0	6
Biological Scientists	4	0	0	0	0	0	4
Designers, All Other	4	0	0	0	0	0	4
Family and General Practitioners	1	0	1	0	0	2	4
Health Diagnosing and Treating Practitioners	4	0	0	0	0	0	4
Medical and Clinical Laboratory Technologists	0	0	1	0	2	0	3
Engineering Technician	0	0	2	0	0	0	2
Chiropractor	0	1	0	0	0	0	1
Obstetricians and Gynecologists	1	0	0	0	0	0	1
Occupational Health and Safety Specialists	0	0	1	0	0	0	1
Occupational Therapist	0	0	0	0	1	0	1
Optometrists	0	0	1	0	0	0	1
Registered Nurses	1	0	0	0	0	0	1

Source: Myvisajobs.com

Only two percent of visas issued in the greater Portland region in 2012 were for Health Care-related jobs.

H-1B's are dominated by Oregon Health and Science University, with 31 certified visas in 2014.

## THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE



These programs funded in whole or part through the U.S. Department of Labor. We are equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities.