

JACKSON COUNTY ECONOMIC OVERVIEW

JACKSON COUNTY LIBRARY DISTRICT

JULY 18TH, 2025

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!

AGENDA

- Macroeconomic Outlook
- Demographics
- Migration & Commuting Patterns
- Labor Market Conditions
 - Supply
 - Demand
- Projected Growth

MACROECONOMIC OUTLOOK

ECONOMIC ACTIVITY (OREGON & REGION)

- Economic activity in the Twelfth District (Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah, and Washington) was largely stable over the reporting period.
- Employment levels fell somewhat, and employers across industries and geographies reported recent and planned layoffs.
- Wages grew at a slight pace and prices increased modestly.
- Retail sales expanded modestly, and consumer and business services demand eased amidst elevated economic uncertainty.
- Activity in the manufacturing and residential real estate market weakened somewhat.
- Conditions in agriculture, commercial real estate, and the financial sector were largely unchanged and deteriorated further in the nonprofit sector.
- Looking ahead, contacts reported making contingency plans in response to economic uncertainty and an expected pickup in inflation.

Source: Federal Reserve Bank, Beige Book, July 16, 2025

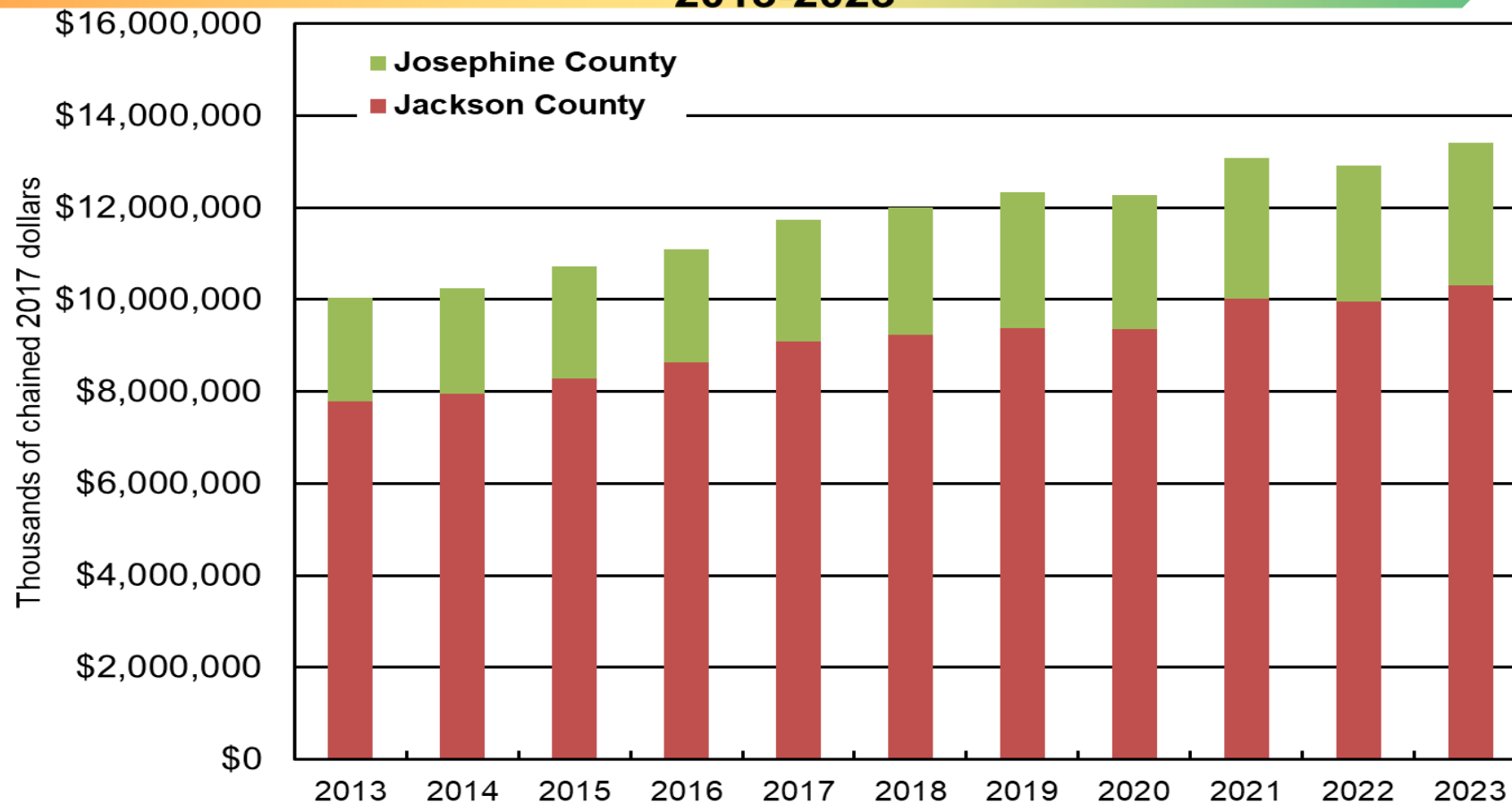
LABOR MARKETS (OREGON & REGION)

- Employment levels were slightly lower on net over the reporting period.
- Employers across many industries and geographies reported instituting a hiring freeze and using attrition to reduce headcounts.
- Critical positions, however, were still being filled, and firms generally reported no problems hiring in recent weeks except for very specialized roles.
- A few contacts in the manufacturing and entertainment sectors reported layoffs due to lower demand.
- Employment growth in retail and food services remained solid, supported by summer seasonal factors.
- Contacts in the service and manufacturing sectors noted additional investment in automation and AI, reducing their demand for workers on net.
- Employee turnover continued to decline.
- Wages grew at a slight pace.
- Firms generally described demand and supply for labor being in better balance, increasing employers' bargaining power.

Source: Federal Reserve Bank, Beige Book, July 16, 2025

IN 2023, ROGUE VALLEY'S GROSS DOMESTIC PRODUCT WAS \$13.6 BILLION, WHICH WAS AN INCREASE OF 3.9% FROM 2022

Rogue Valley Real Gross Domestic Product 2013-2023



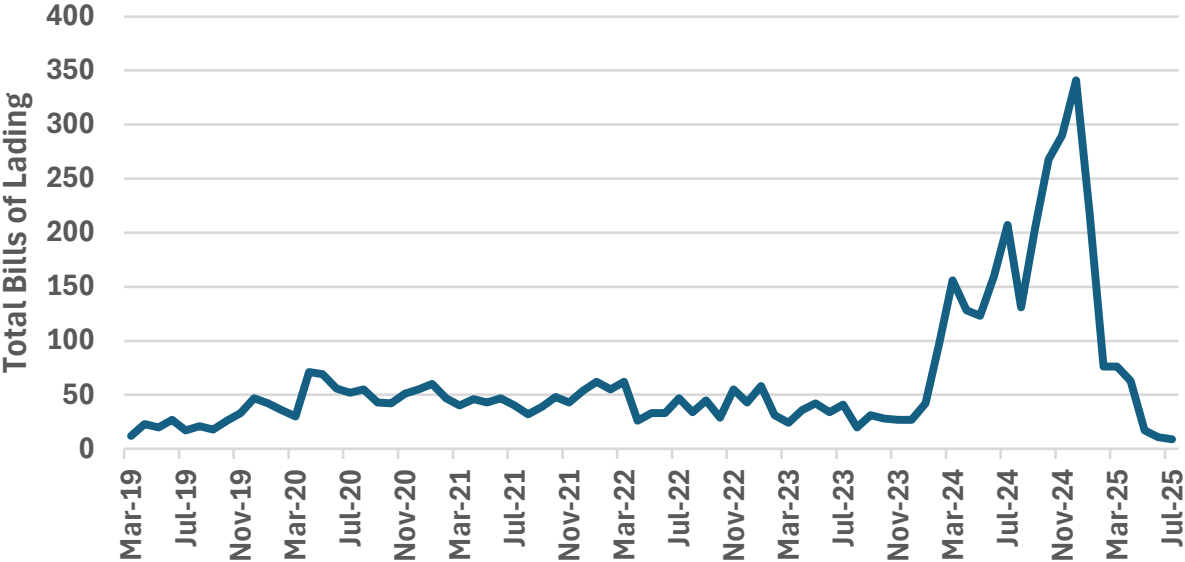
Source: Bureau of Economic Analysis and Oregon Employment Department

In real, or inflation-adjusted dollars, Jackson County total GDP rose from about \$6.6 billion in 2001 to \$10.3 billion in 2023.

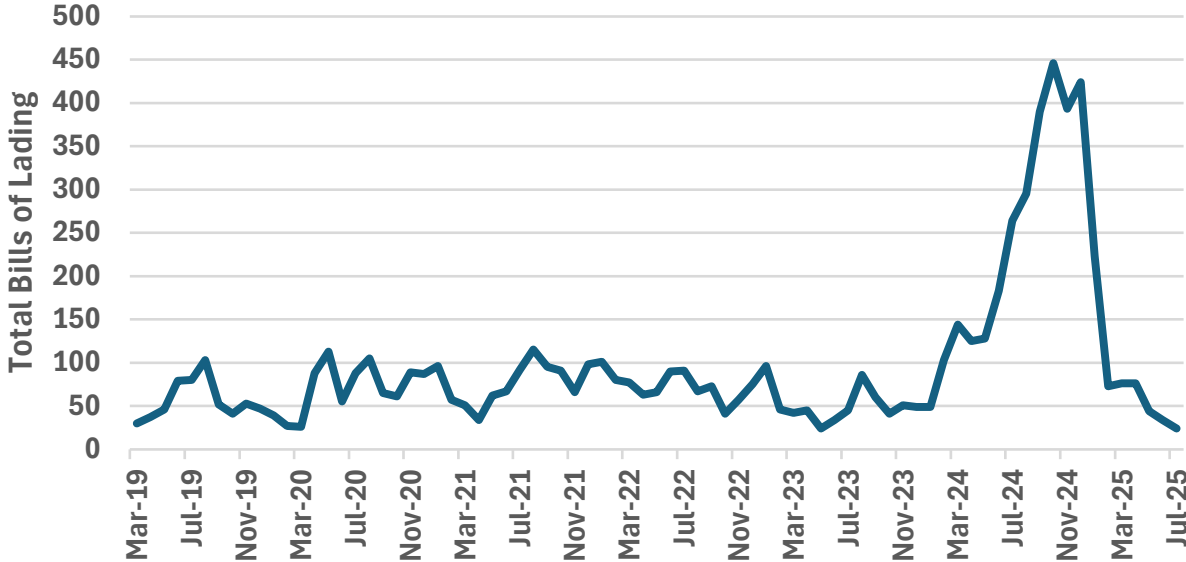
Josephine County real GDP climbed from about \$1.9 billion to \$3.9 billion over that time.

SHIPMENT RECEIPTS INCREASED NOTICEABLY IN 2024 BUT HAS SINCE DECLINED

Grants Pass
Import Activity



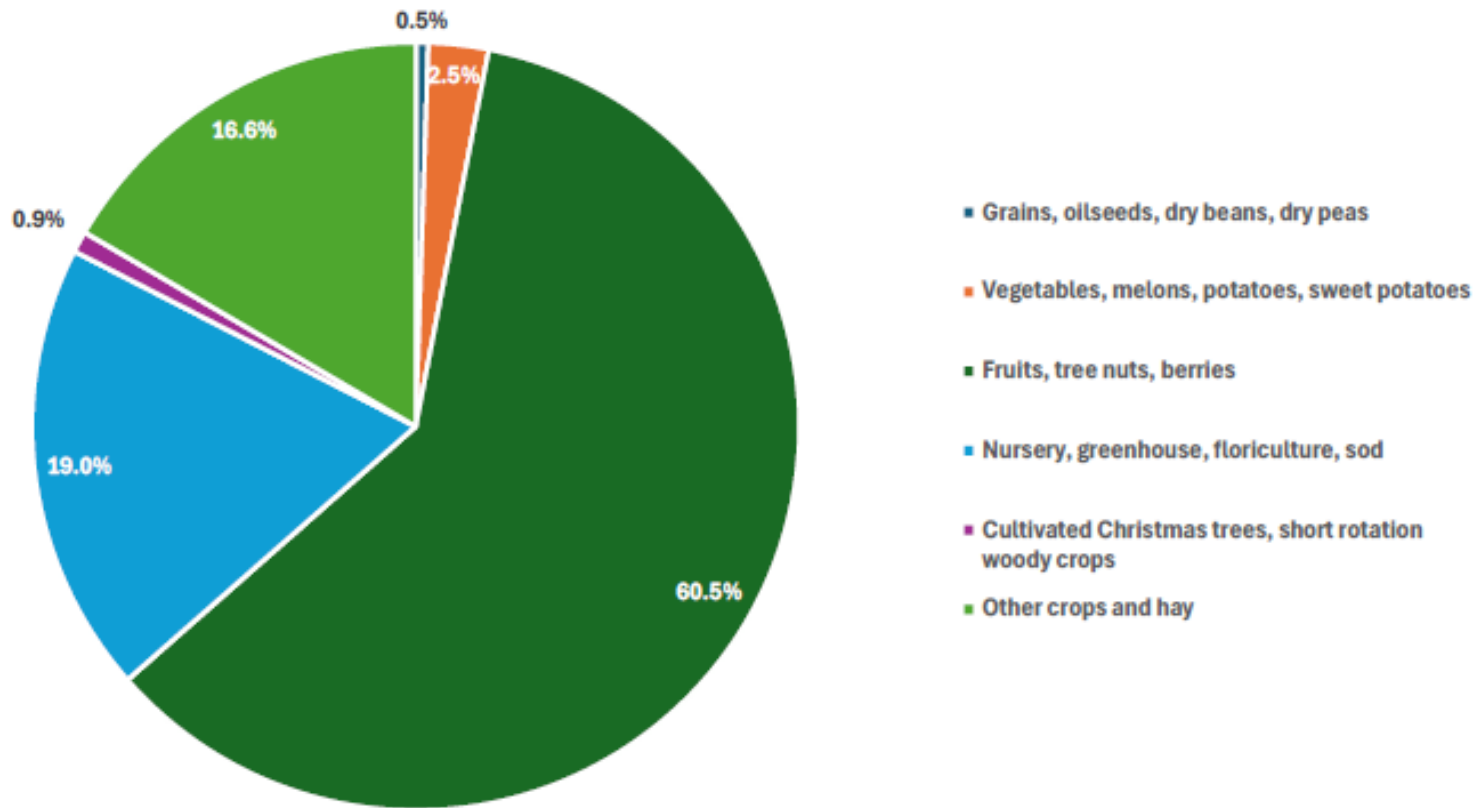
Medford
Import Activity



Source: Import Info, U.S. Customs & Border Protection

AGRICULTURE PLAYS A CRITICAL ROLE IN THE REGION'S ECONOMY...

2022 Crop Sales



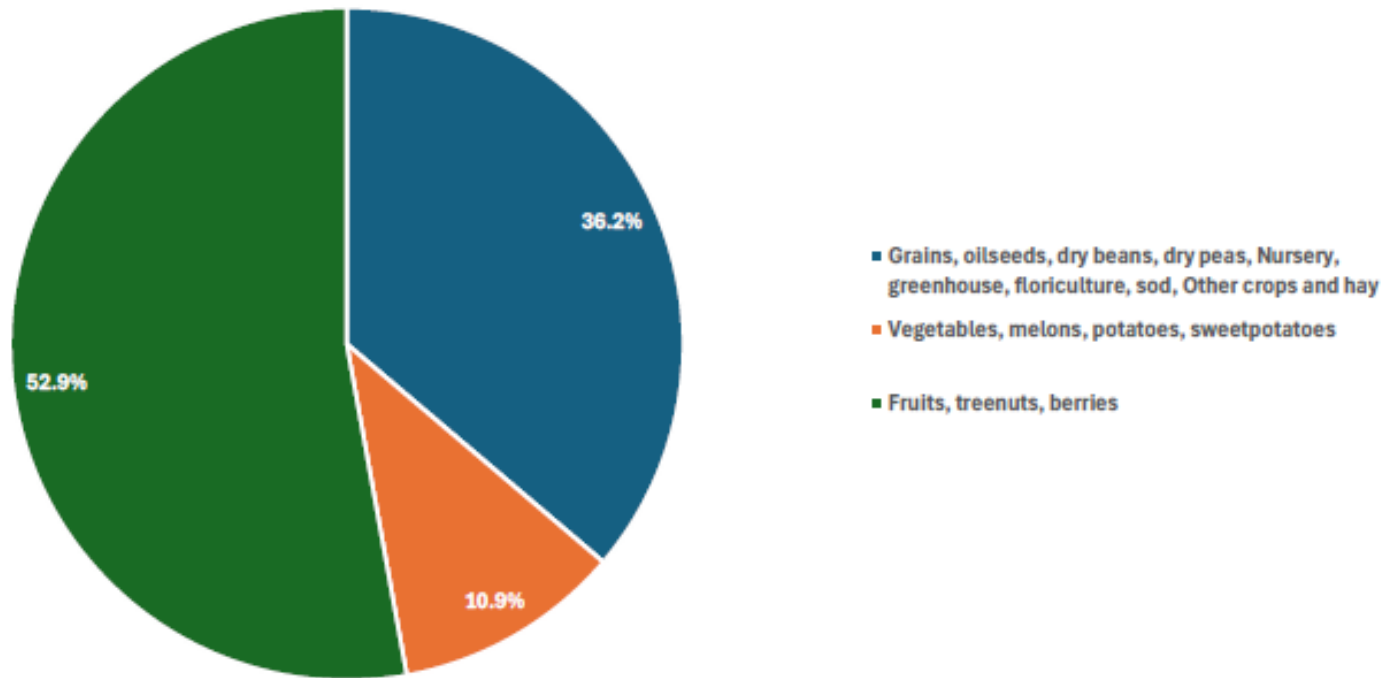
Jackson County sold \$105 million in agricultural products in 2022. Crop sales accounted for 83% of all agricultural sales, generating \$87 million.

Fruits, tree nuts, and berries made up nearly 61% of all crop sales with \$53 million. Nursery, greenhouse, floriculture, and sod was the second highest grossing segment bringing in \$17 million, or 19%. These two categories combined for over 80% of crop sales.

Of particular interest, Jackson County was 8th out of 36 counties for sales of fruits, tree nuts, and berries. This placed the county in the top 3% nationwide. While ranking 7th in the state for other animals and animal products, Jackson was found in top 7% nationally.

...SPECIFICALLY FRUITS, TREENUTS, AND BERRIES.

2022 Crop Sales



Josephine County sold \$38 million in agricultural products in 2022. Crop sales accounted for 64% of all agricultural sales, generating \$25 million.

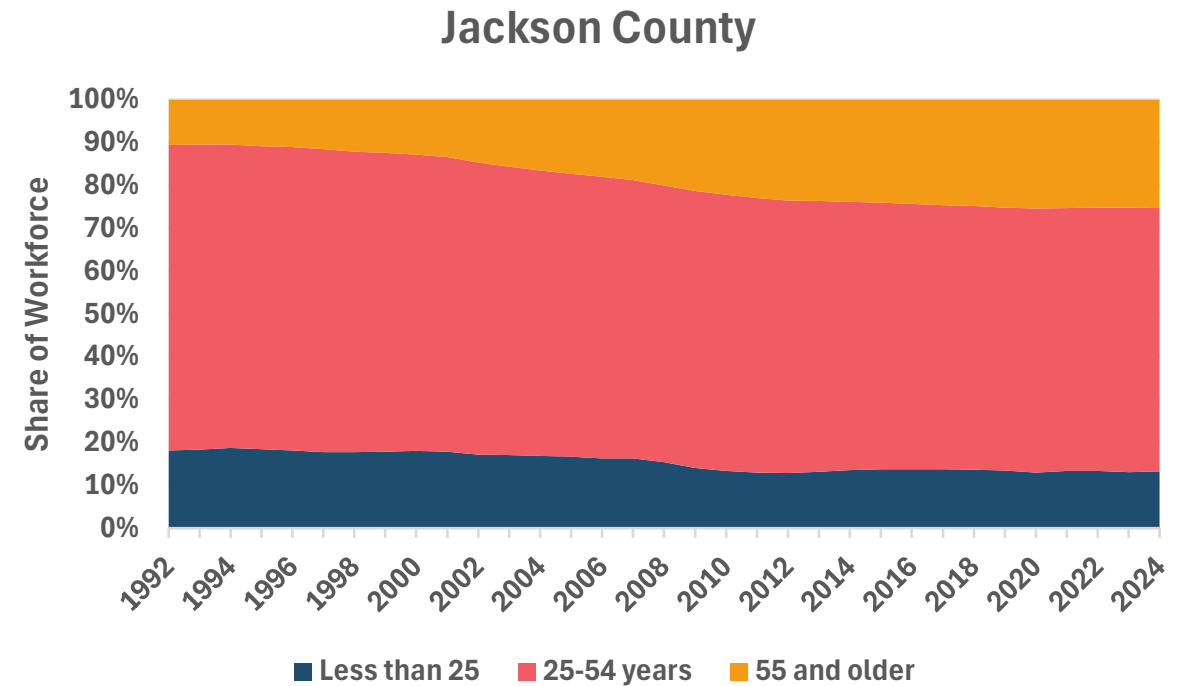
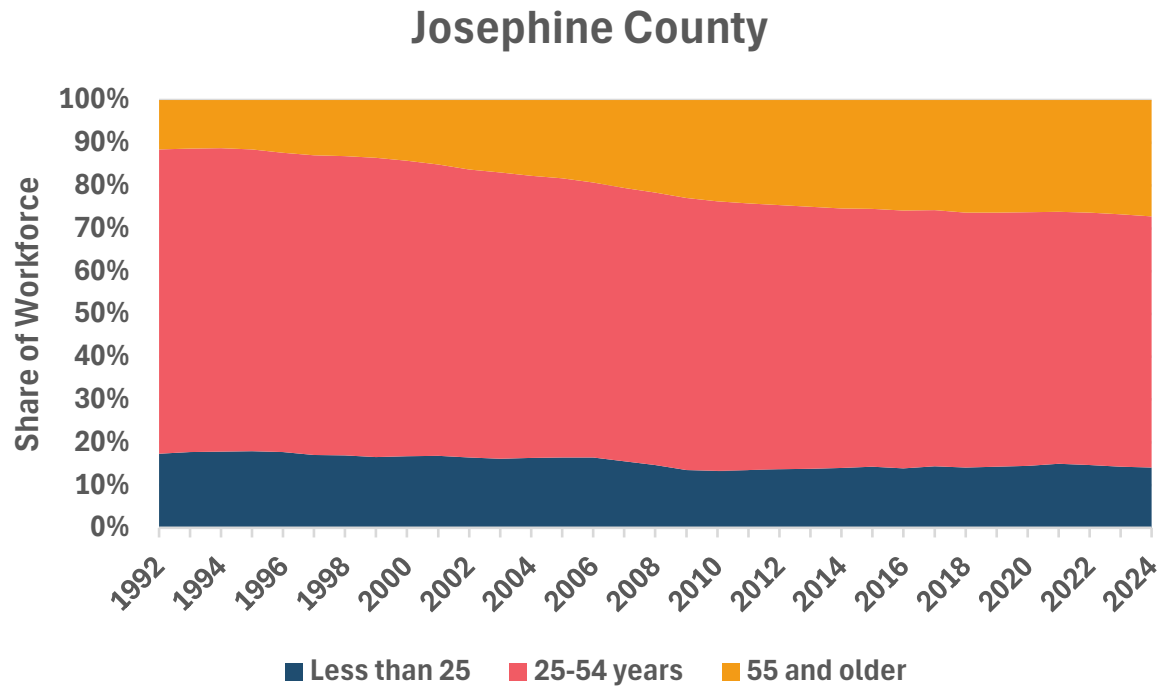
Fruits, tree nuts, and berries made up nearly 53% of all crop sales with \$13 million. Vegetables, melons, potatoes, and sweet potatoes brought in \$3 million, or 11%. These two categories combined for over 63% of crop sales.

Of particular interest Josephine County was 15th out of 33 counties for sales of fruits, tree nuts, and berries. This placed the county in the top 6% nationwide. While ranking 12th in the state for milk from cows, Josephine was found in top 27% nationally.

DEMOGRAPHICS

WORKFORCE AGE DEMOGRAPHICS

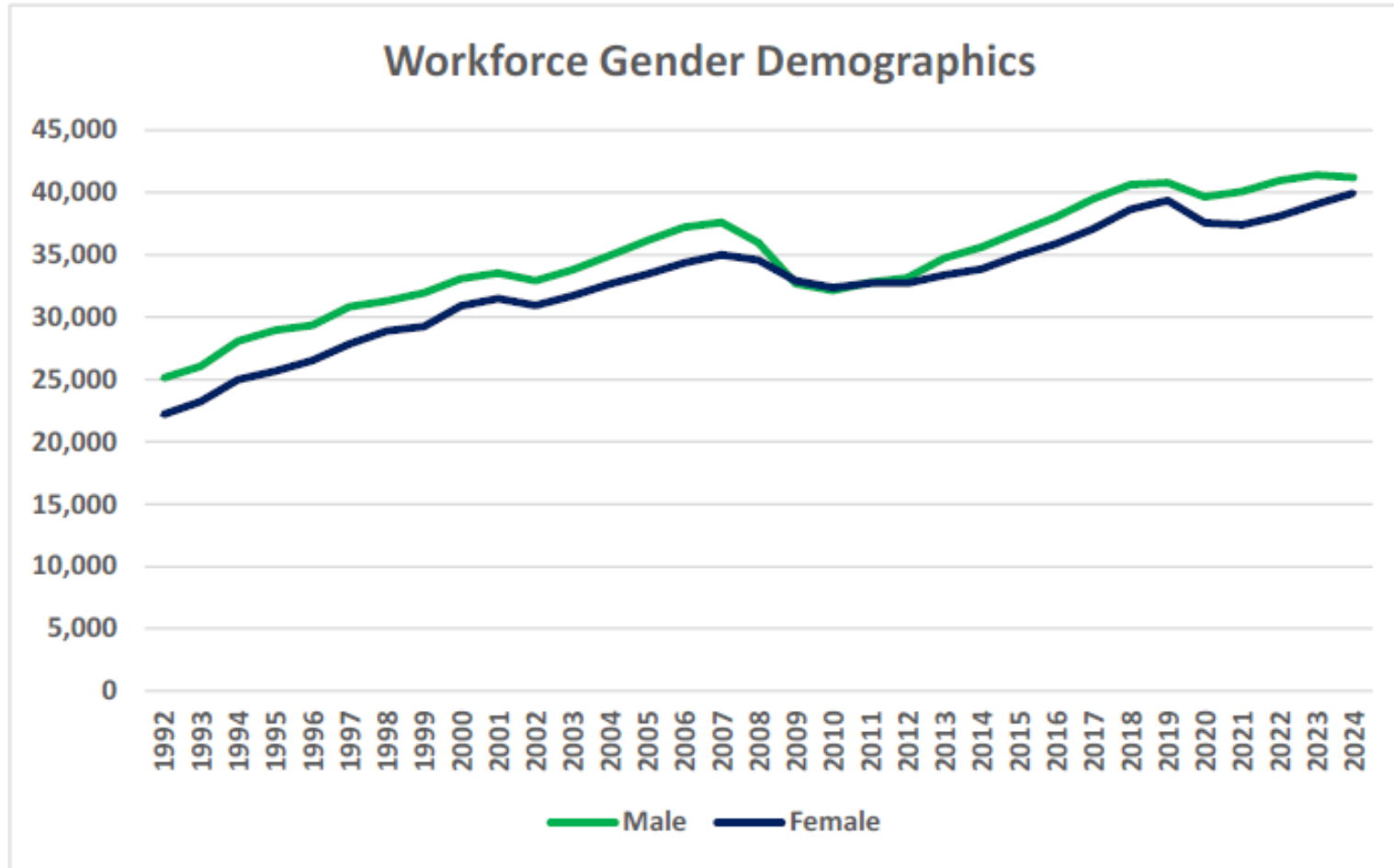
In Josephine County the number of workers age 55 and older quadrupled from 1,647 to 7,341.



In Jackson County the number of workers age 55 and older nearly quadrupled from 4,956 to 19,635.

Source: U.S. Census Bureau, Quarterly Workforce Indicators

WORKFORCE GENDER DISTRIBUTION



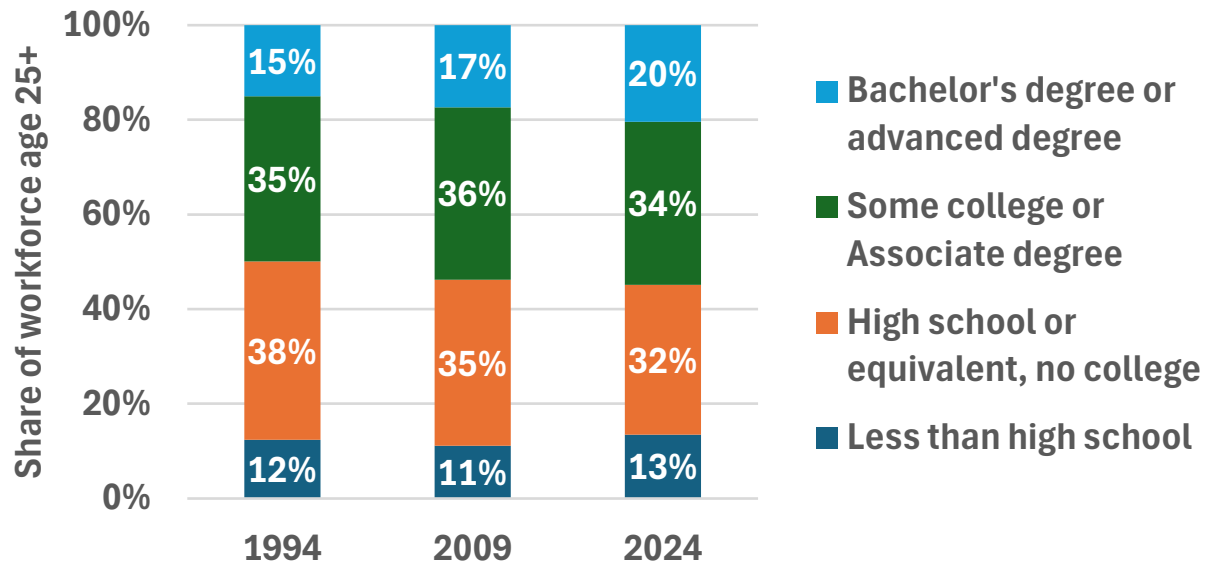
Gender demographics are available from the U.S. Census QWI Explorer for Jackson County beginning in 1992. Female representation in the workforce has ranged from a low of 46% to a high of 50% depending on the year. In 2009 and 2010 women represented approximately 50.2% of the workforce, record highs.

Male representation in the workforce was the highest proportionally in 1992 with 53.1%. After the convergence in 2009-2010 the share of male representation has been greater, though the data indicates the gap has been decreasing the last few years. As of 2024 the male population accounts for 50.8% of the workforce.

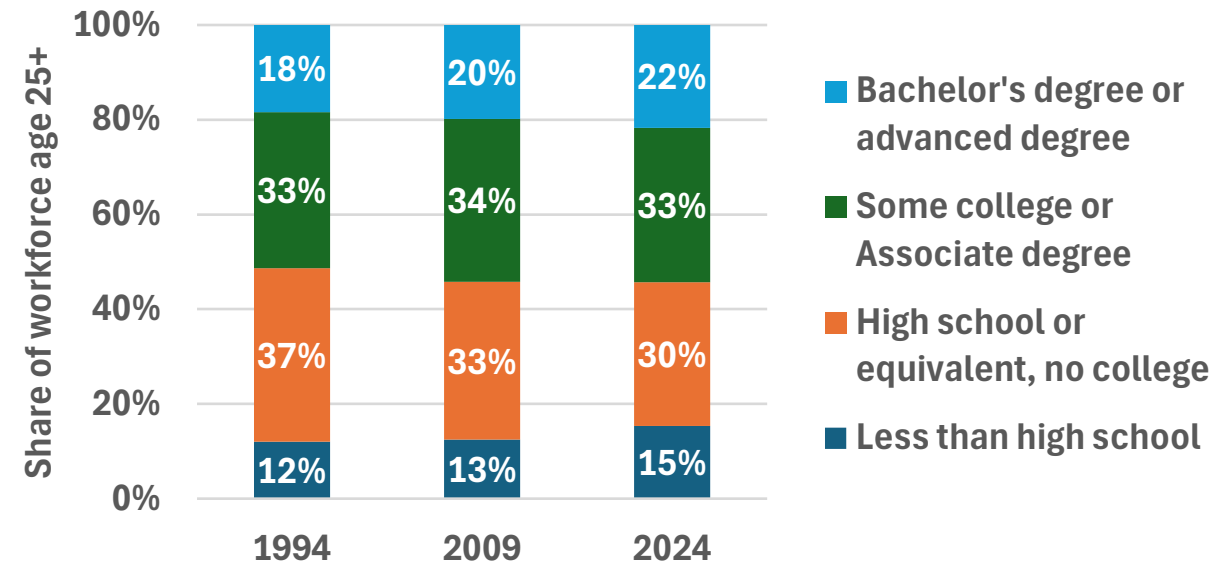
EDUCATIONAL ATTAINMENT

In 1994 over half (51%) of Jackson County's workforce had attended college. Nearly one in five workers held a bachelor's or advanced degree.

Josephine County
Educational Attainment 1994-2024



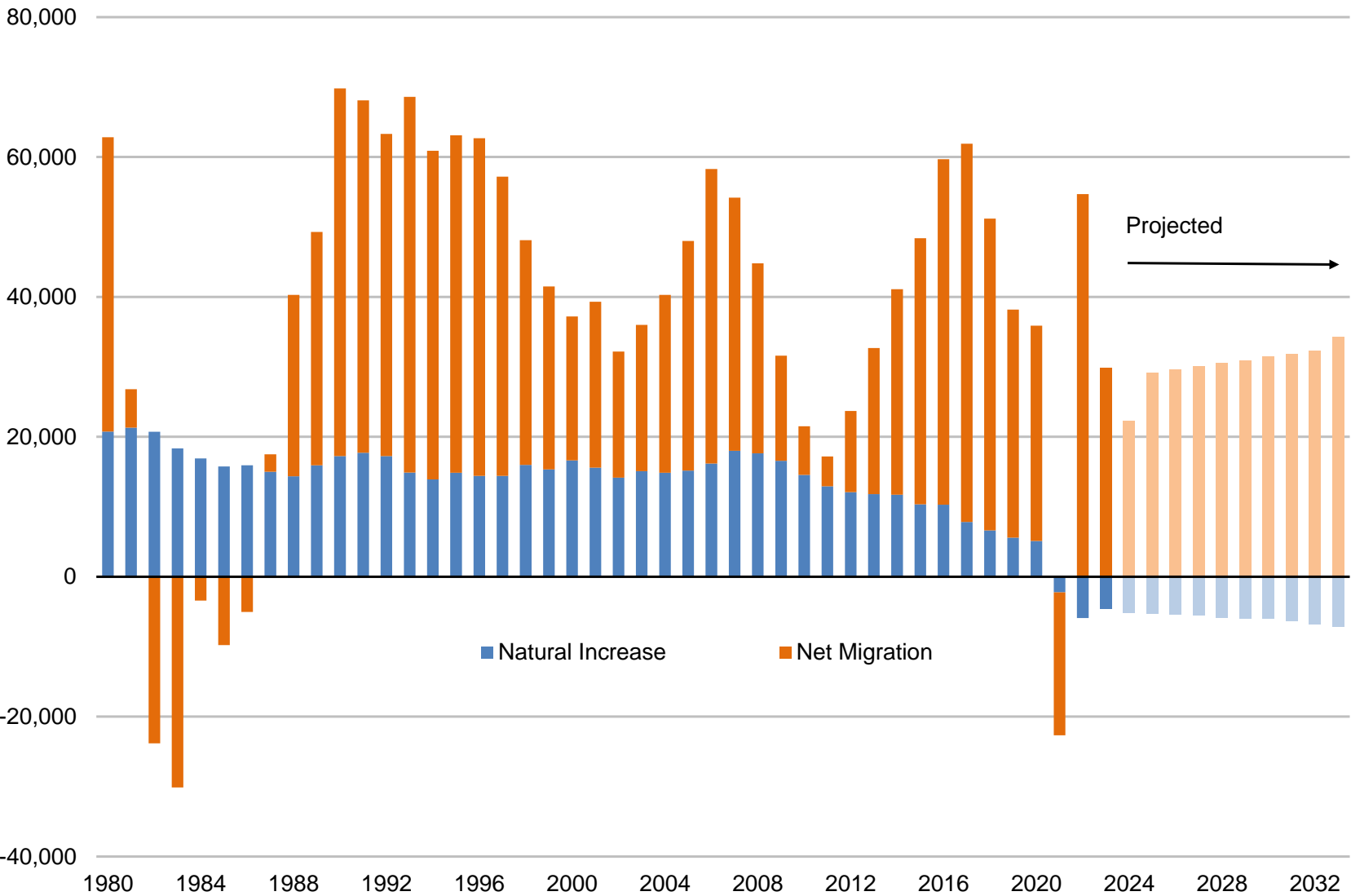
Jackson County
Educational Attainment 1994-2024



In 2024 more than half of Jackson County's workforce (55%) had some college level education. More than one in five workers hold a bachelor's or advanced degree.

SLOWING LABOR FORCE GROWTH: SLOWER POPULATION GROWTH

Oregon's Population Components of Change

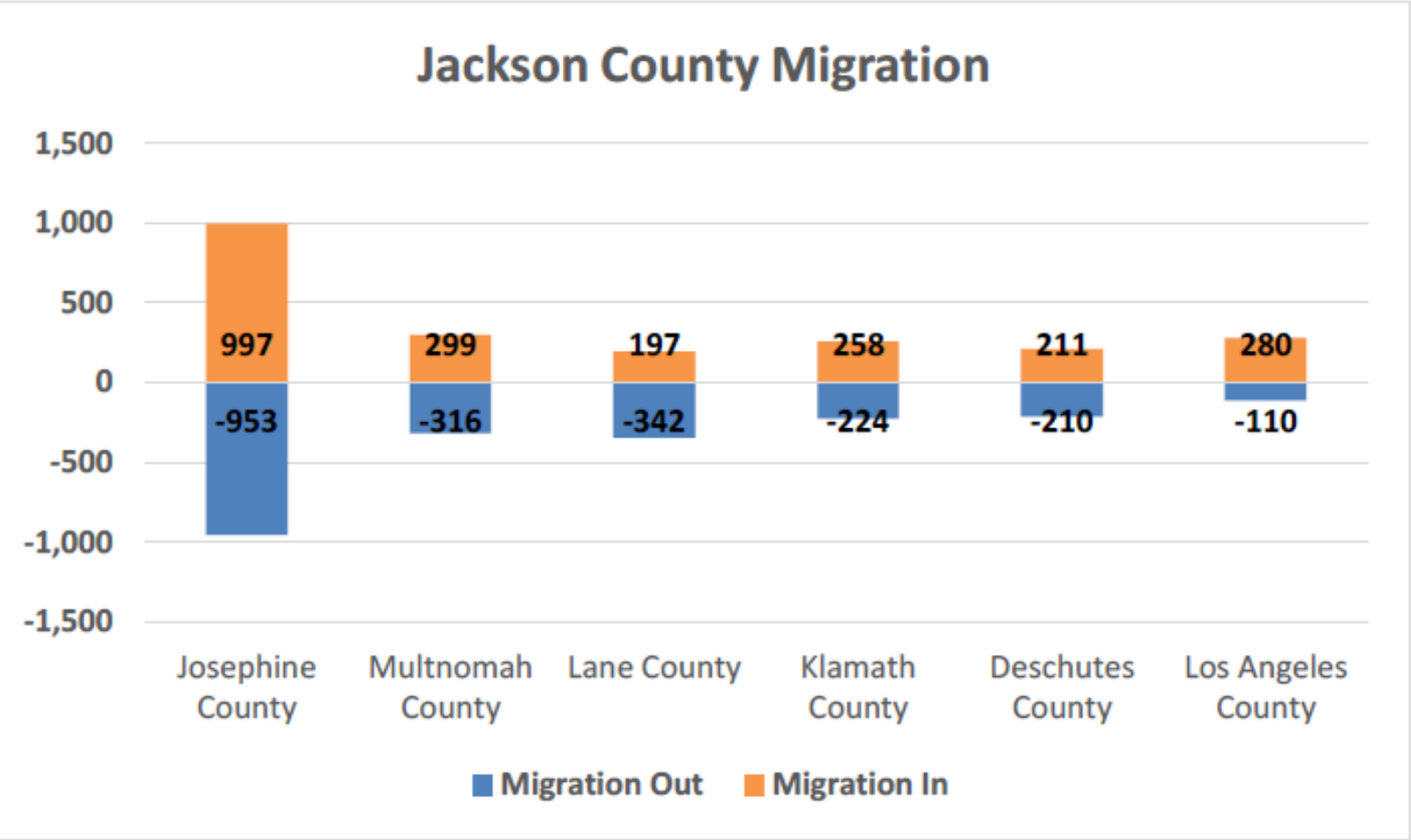


Portland State University estimates show a rebound in 2022, but population growth is projected to be slower in the coming years than historical norms.

Source: Oregon Employment Department, Oregon Office of Economic Analysis

MIGRATION & COMMUTING

Jackson County Migration



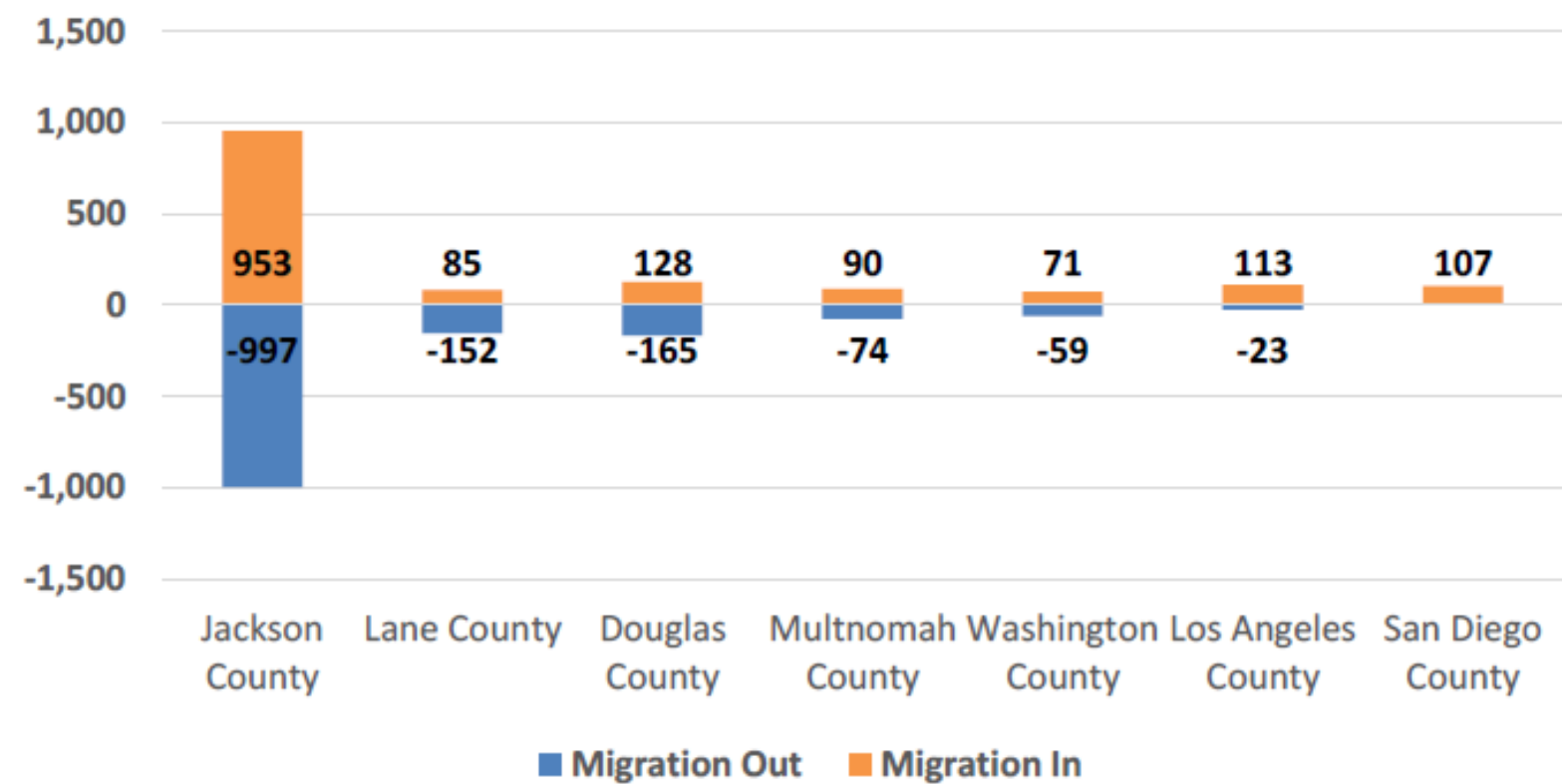
This is a snapshot of the top counties for migration in and out of Jackson County based on Internal Revenue Service data. Jackson experienced a net population gain from Josephine and Klamath counties in Oregon and Los Angeles county, California. A higher proportion of individuals moved out than in to Multnomah, Lane, and Klamath counties.

In terms of total migration, Josephine County accounts for about one out of 10 individuals moving in or out of Jackson County. Lane County represented 4% of total migration out and 2% of migration in. Multnomah, Klamath, and Los Angeles counties contributed about 3% each for migration into the county.

Source: Internal Revenue Service, Migration Data 2021 to 2022

MOST MIGRATION OCCURS WITHIN THE STATE

Josephine County Migration

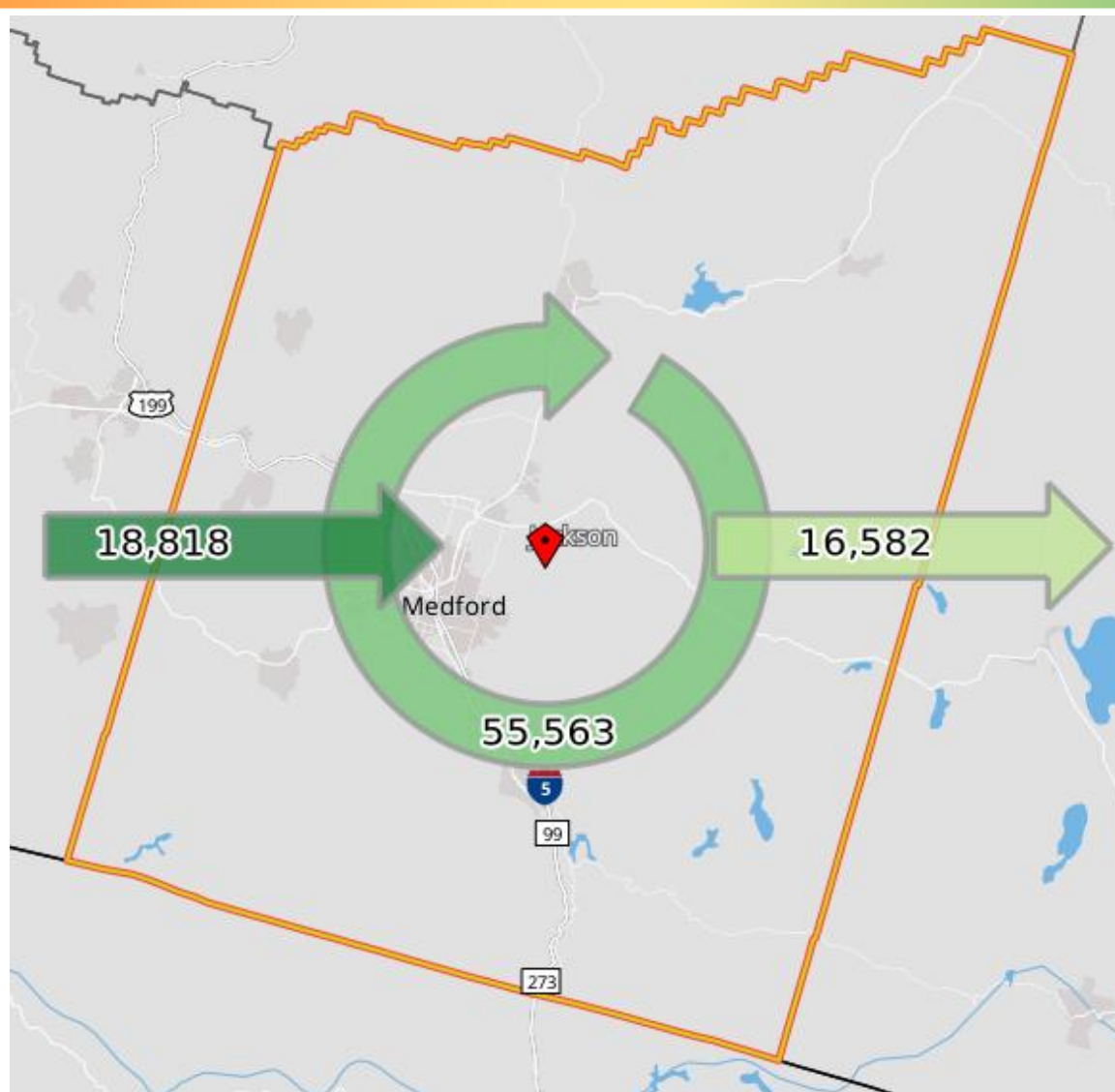


This is a snapshot of the top counties for migration in and out of Josephine County based on Internal Revenue Service data. Josephine experienced a net population gain from Multnomah and Washington counties in Oregon and Los Angeles and San Diego counties in California. A higher proportion of individuals moved out than in to Jackson, Lane, Douglas, and Washington counties.

In terms of total migration, Jackson County accounts for about one out of four individuals moving in or out of Josephine County. Lane County represented 4% of total migration out and 2% of migration in. Los Angeles, San Diego and Douglas counties contributed about 3% each for migration in.

Source: Internal Revenue Service, Migration Data 2021 to 2022

JACKSON COUNTY COMMUTING PATTERNS



In 2022 there were 74,381 individuals employed within Jackson County:

- 18,818 individuals (25.3%) were employed in the county but lived outside it
- 55,563 individuals were both employed and lived in the county (74.7%)
- An additional 16,582 individuals lived in the county but were employed outside it.

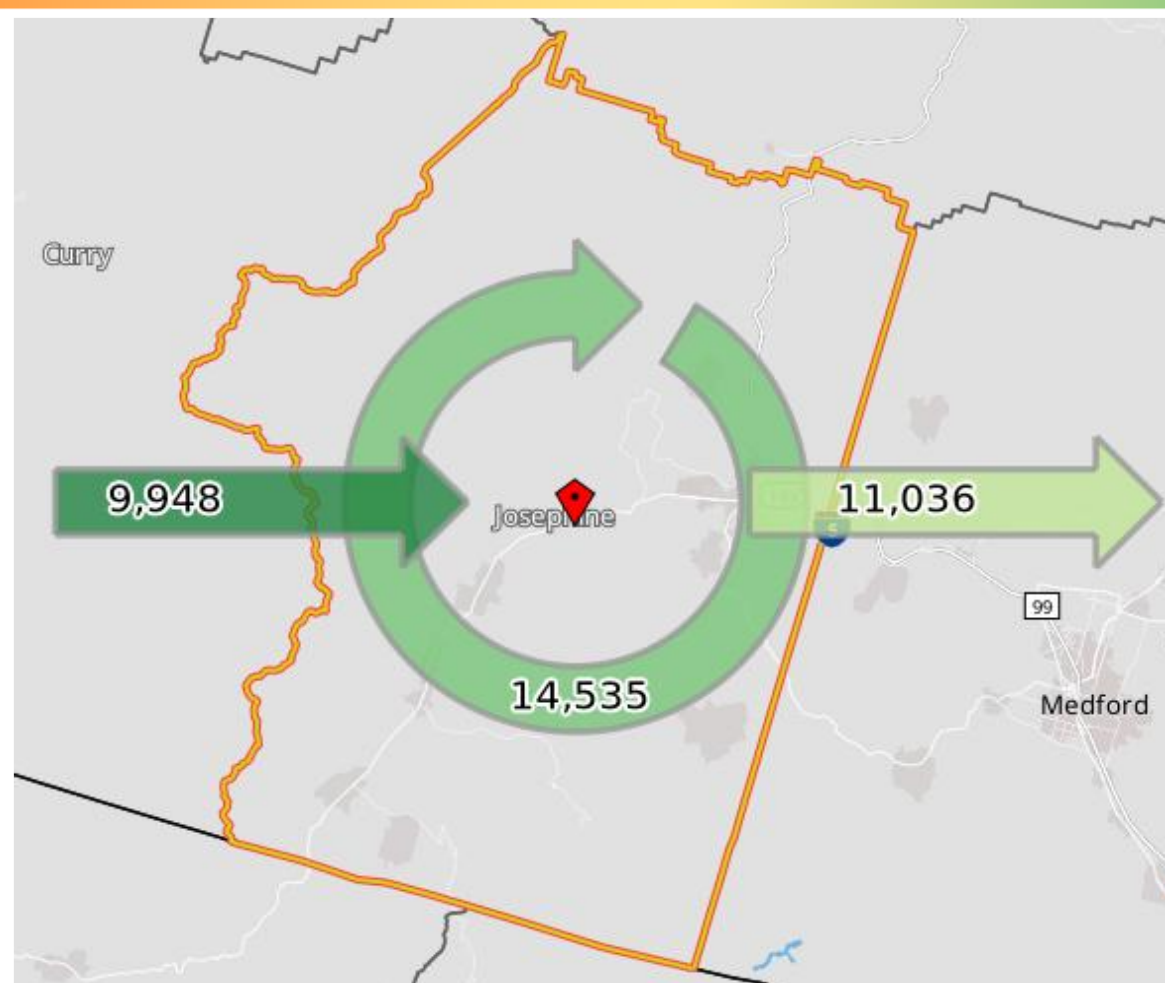
Of those commuting into Jackson County for work:

- Josephine (7.1%)
- Douglas (2.5%)
- Klamath (1.7%)
- Multnomah (1.5%), and
- Lane (1.4%) were the top five destinations comprising 14.2%.

59.5% of individuals commute < 10 miles

17.5% commute farther than 50 miles

JOSEPHINE COUNTY COMMUTING PATTERNS



In 2022 there were 24,083 individuals employed within Josephine County:

- 9,948 individuals (40.6%) were employed in the county but lived outside it
- 14,535 individuals were both employed and lived in the county (59.4%)
- An additional 11,036 individuals lived in the county but were employed outside it.

Of those commuting into Josephine County for work:

- Jackson (18.3%)
- Douglas (4.8%)
- Lane (2.3%)
- Coos (1.9%), and
- Multnomah (1.3%) were the top five destinations comprising 28.6%.

53.7% of individuals commute < 10 miles

20.2% commute farther than 50 miles

LABOR MARKET CONDITIONS SUPPLY

UNEMPLOYMENT RATE HAS BEEN BETWEEN 5.1%-5.2% SINCE JANUARY

Jackson County
May 2025
(Seasonally Adjusted)

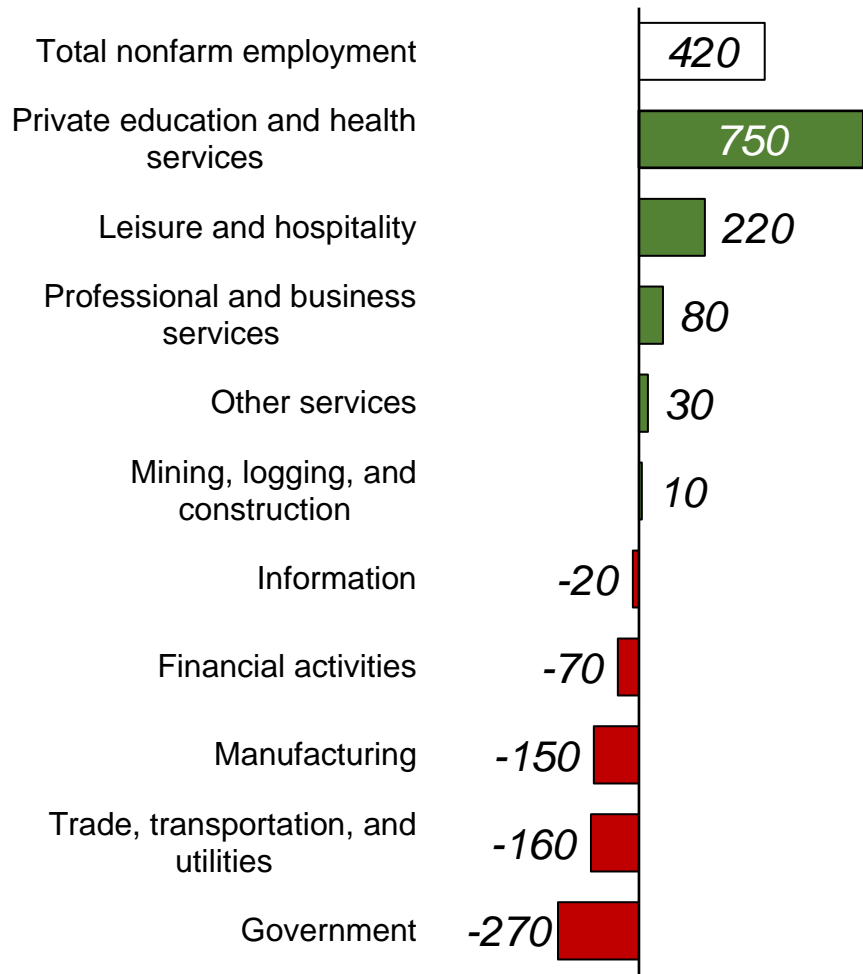
Civilian Labor Force	Unemployment Rate	Number of Employed	Number of Unemployed
106,222	5.2%	100,692	5,530

Unemployment Rate



Source: Oregon Employment Department, Local Area Unemployment Statistics

OVER THE YEAR INDUSTRY EMPLOYMENT CHANGE +0.5% IN MAY



FEATURED PUBLICATIONS



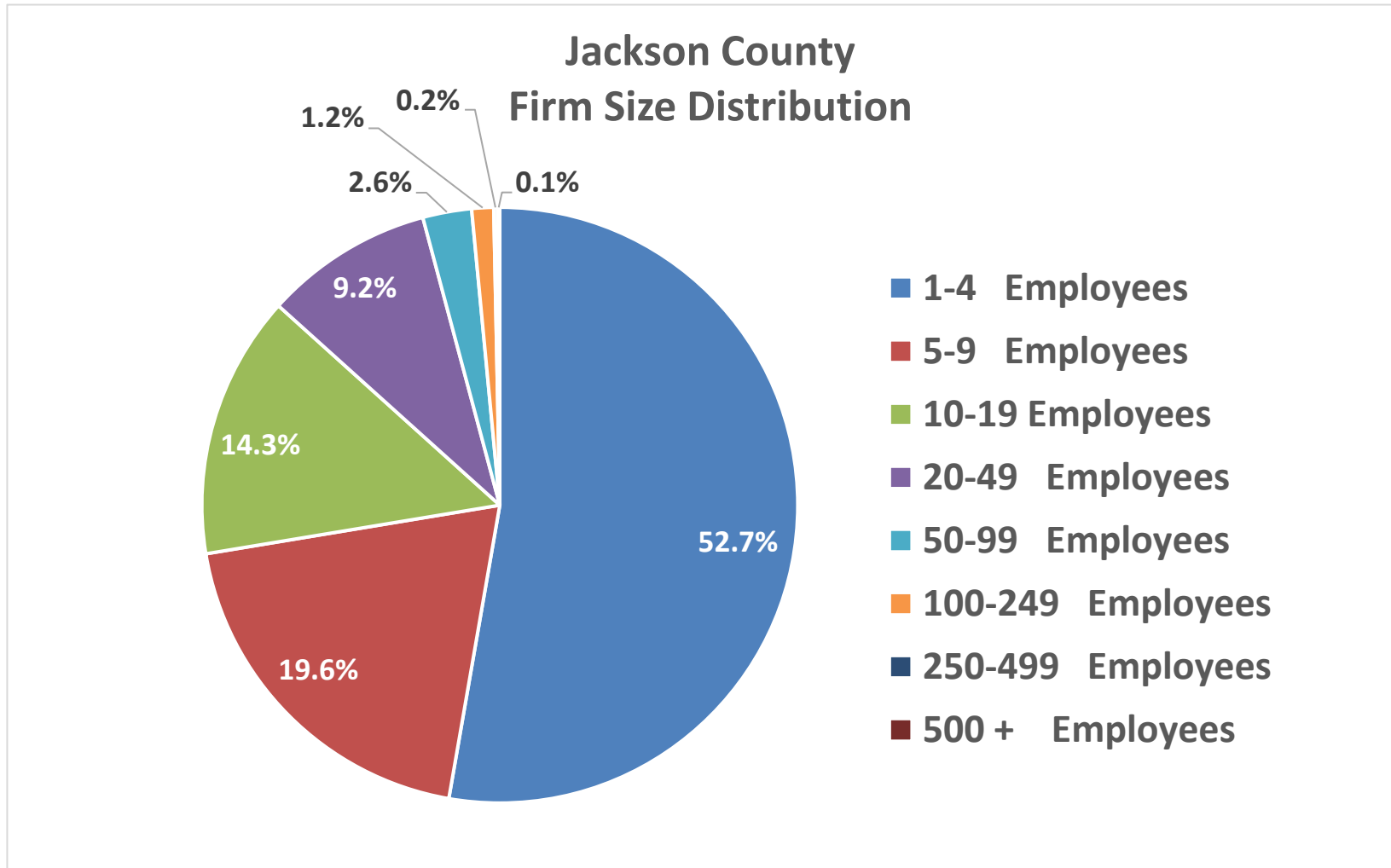
Jul 8, 2025

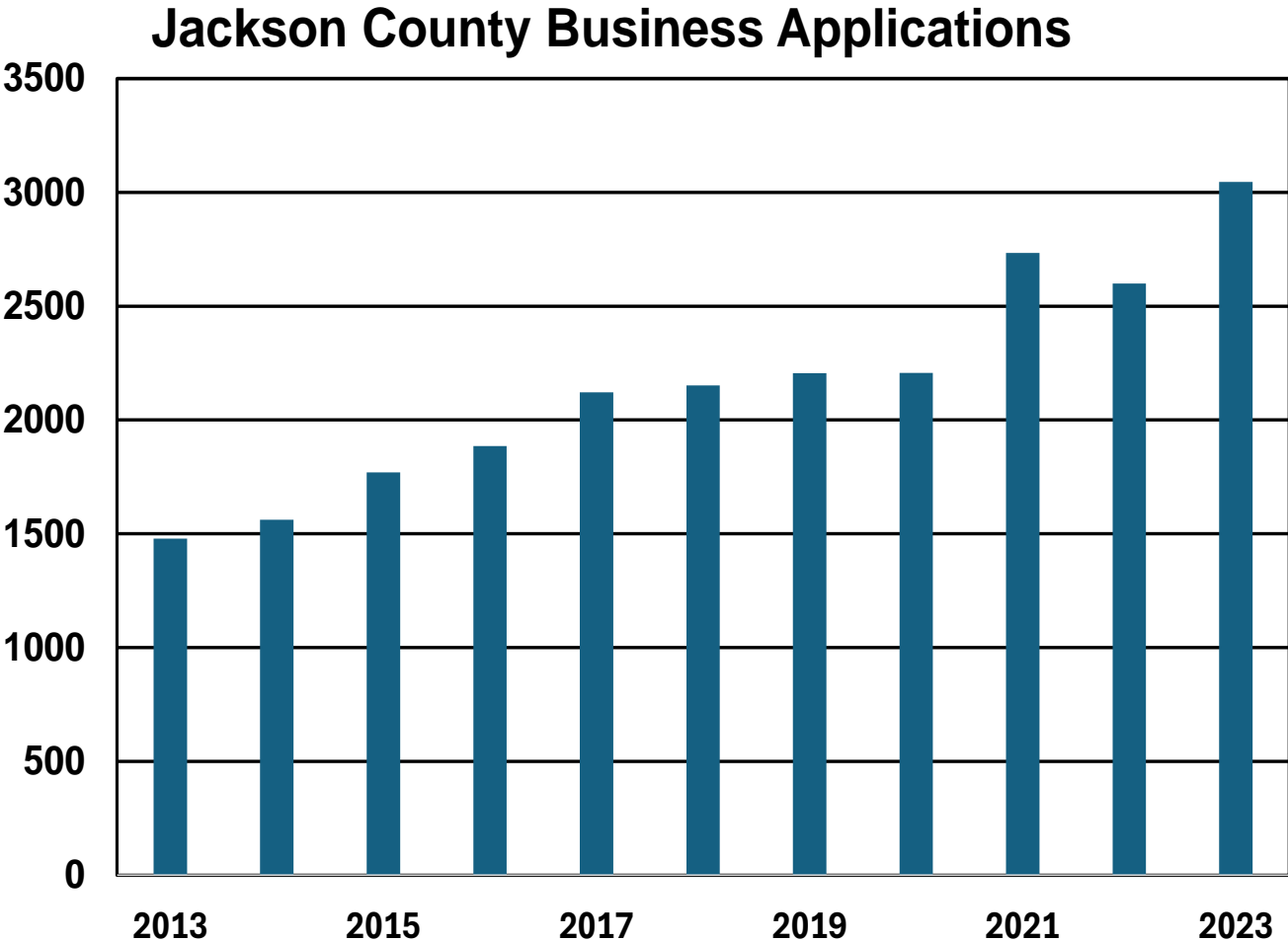
Growing Demand and Workforce Needs in Oregon's Health Care and Social Assistance Sector

Health care and social assistance is a large and steadily growing sector of Oregon's economy. Although overall job growth slowed recently in Oregon, gains have accelerated in the health care and social assistance sector.

FIRM SIZE DISTRIBUTION

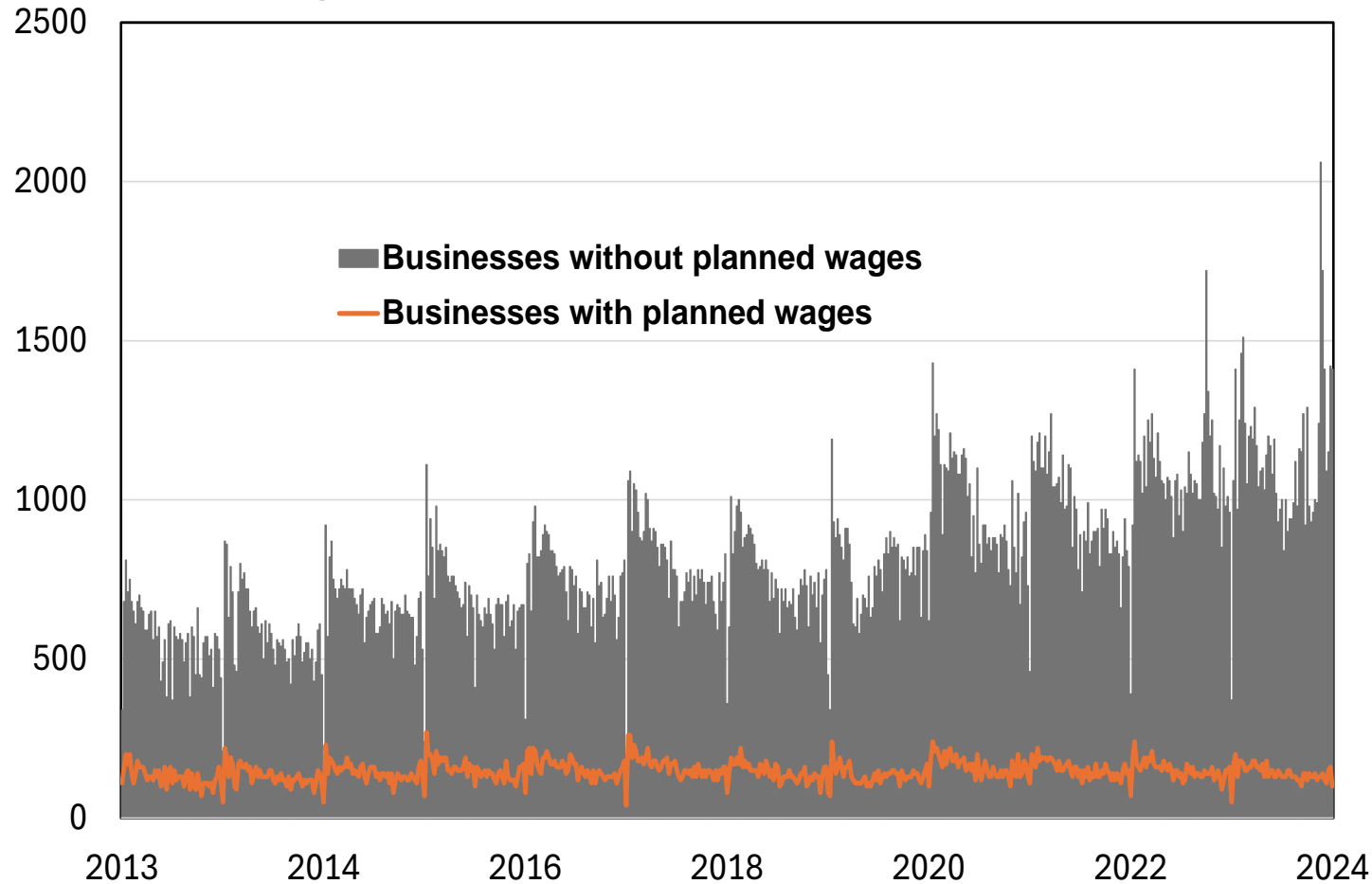
Employers with fewer than 10 employees comprise 72.4% of all businesses in Jackson County.





Source: Oregon Employment Department U.S. Census Bureau Business Formation Statistics

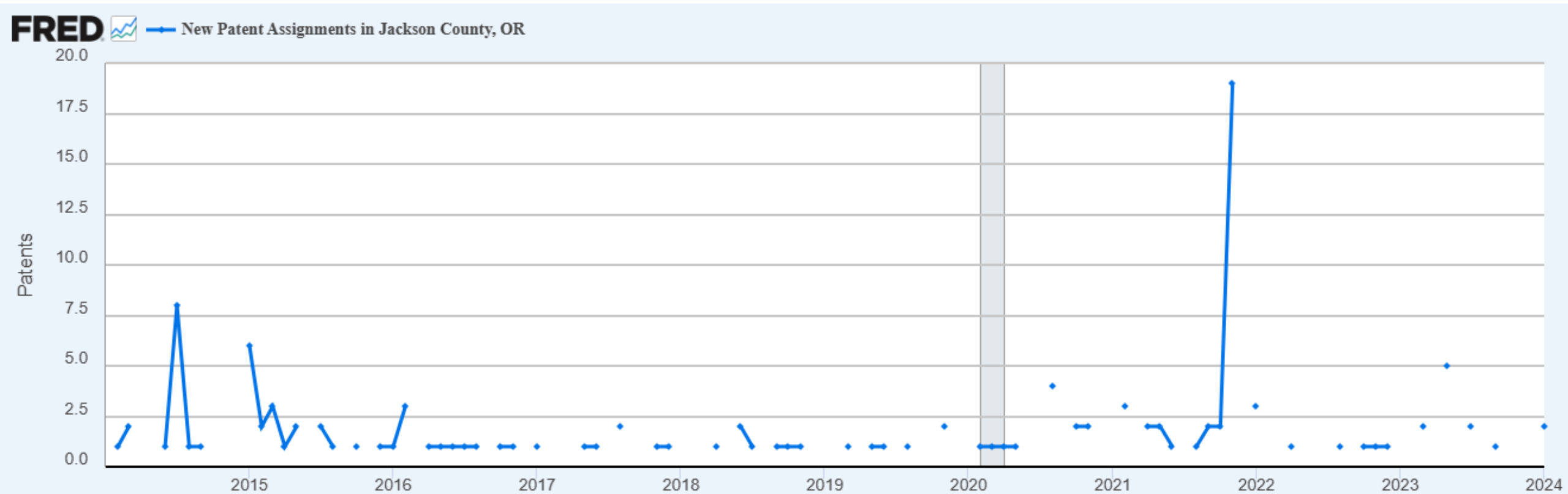
Oregon Business Applications 2013-2024



Source: Oregon Employment Department and U.S. Census Bureau Business Formation Statistics weekly non-seasonally adjusted series

Total business applications with planned wages has remained mostly steady, ranging between about 500 and 700 each month since about 2010. In July 2024, there were 637 Oregon business applications with planned wages and 3,644 without planned wages.

PATENTS SHOW AN UPTICK POST COVID WITH OREGON TRENDING LOWER OVER TIME



Source: U.S. Patent and Trademark Office via FRED®
Shaded areas indicate U.S. recessions.

fred.stlouisfed.org

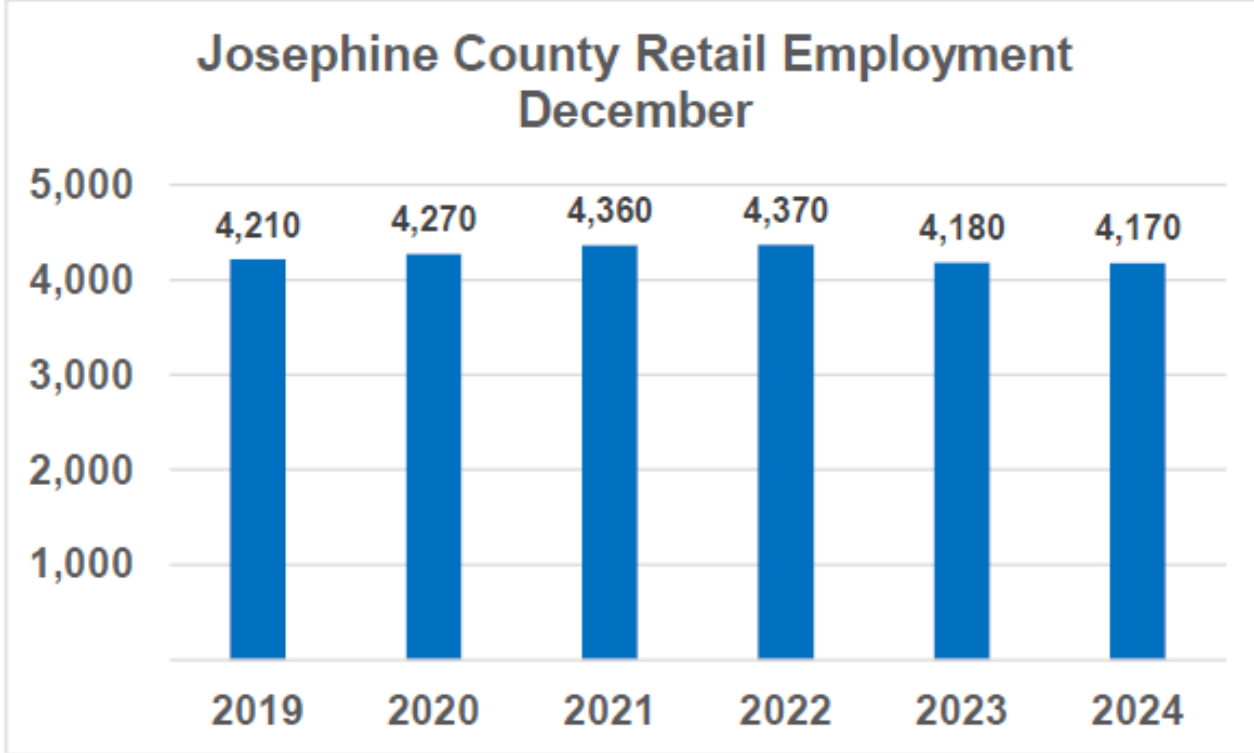
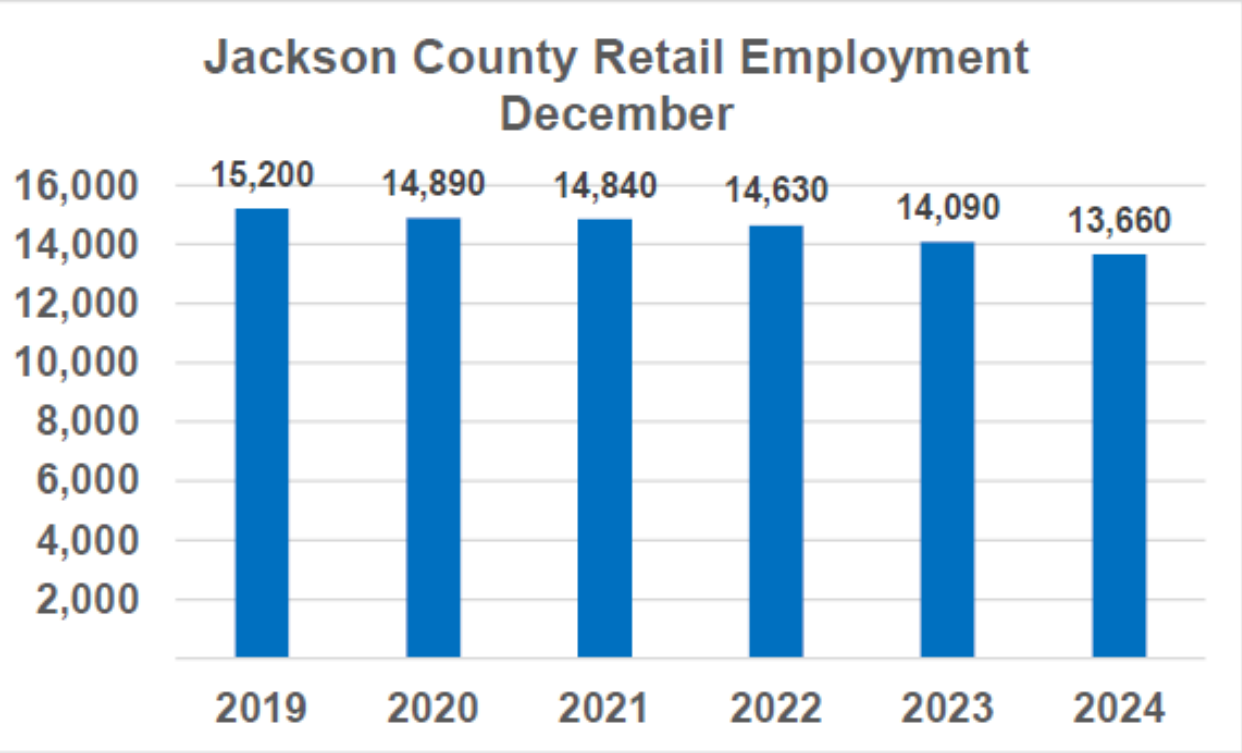
SELF-EMPLOYED ARE ESTIMATED TO BE 1 IN 8 WORKERS IN ROGUE VALLEY IN 2023

Employee of private company workers	61.6%
Self-employed in own incorporated business workers	4.3%
Private not-for-profit wage and salary workers	12.8%
Local government workers	7.1%
State government workers	3.2%
Federal government workers	2.1%
Self-employed in own not incorporated business workers	8.7%
Unpaid family workers	0.2%

Source: U.S. Census Bureau, ACS 5-Year Estimates Detailed Tables, Table B08128, 2023

HOLIDAY RETAIL EMPLOYMENT SPOTLIGHT

December 2024 retail employment decreased by 430 jobs compared to December 2023, a modest loss. At this time the retail sector accounted for 15.1% of all nonfarm employment in Jackson County.



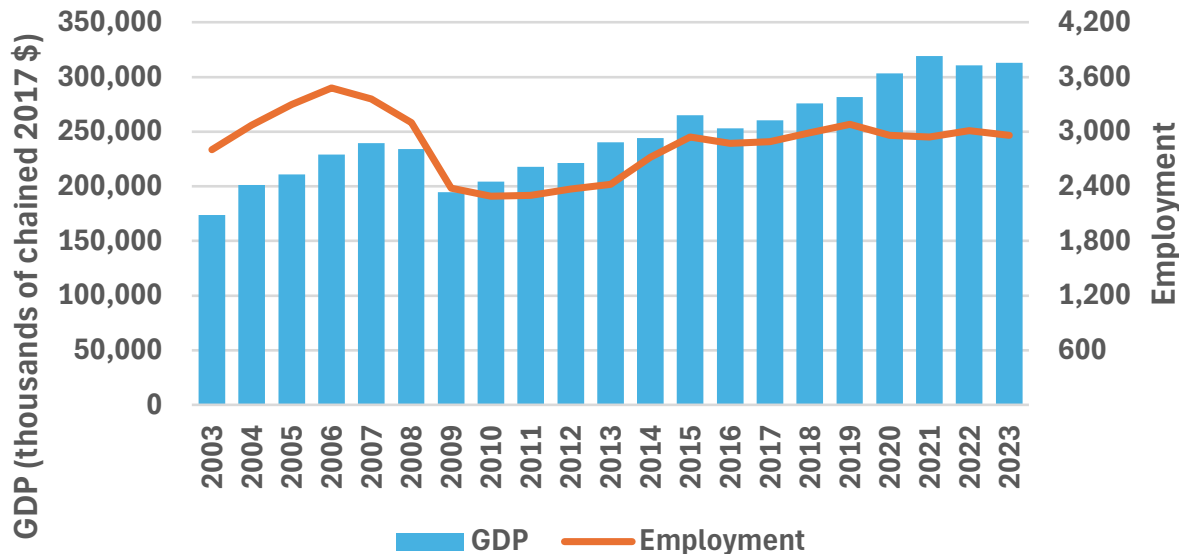
Employment levels in this sector have been declining year over year. Statewide the sector reached a new high in April 2022 but has since been declining.

Source: Oregon Employment Department, Current Employment Statistics

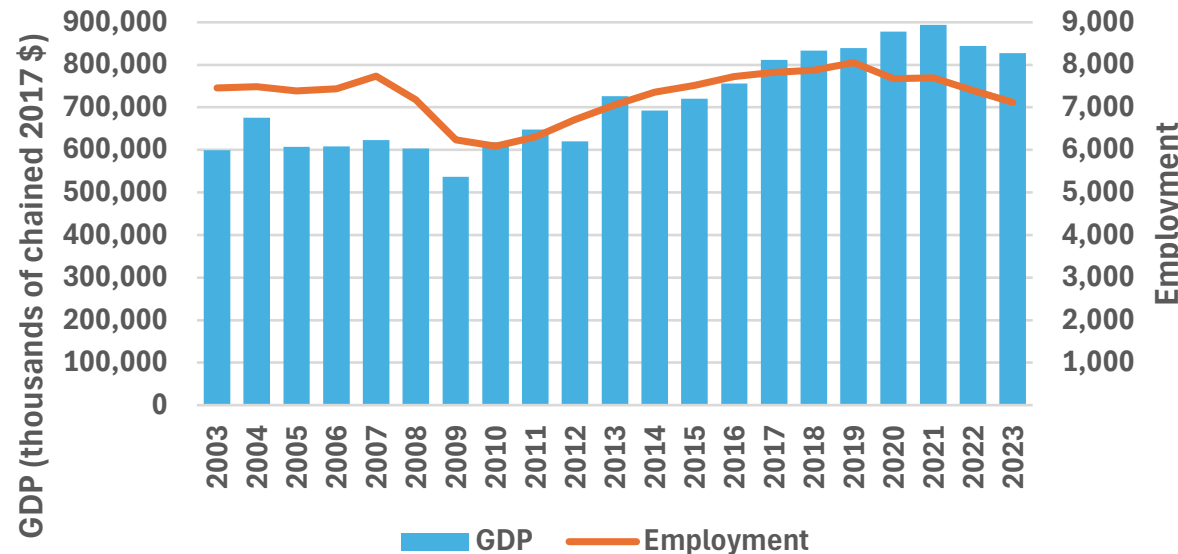
MANUFACTURING SECTOR SPOTLIGHT

From 2014 to 2023 GDP increased by 19% in Jackson County while employment decreased by 3%. As the sector has become more capital intensive it has also become more efficient.

Josephine County
Manufacturing GDP & Employment



Jackson County
Manufacturing GDP & Employment



In 2003 on average every worker in the sector added \$80,000 to GDP. In 2023 this figure was \$116,000, an increase of \$36,000 or 45%. Oregon was a net exporter in 2024.

Source: Bureau of Economic Analysis

LABOR MARKET CONDITIONS DEMAND

THE ROGUE VALLEY HAD ROUGHLY 3,800 JOB VACANCIES AT ANY GIVEN TIME IN 2024

We surveyed 1,700 private employers with two or more employees.

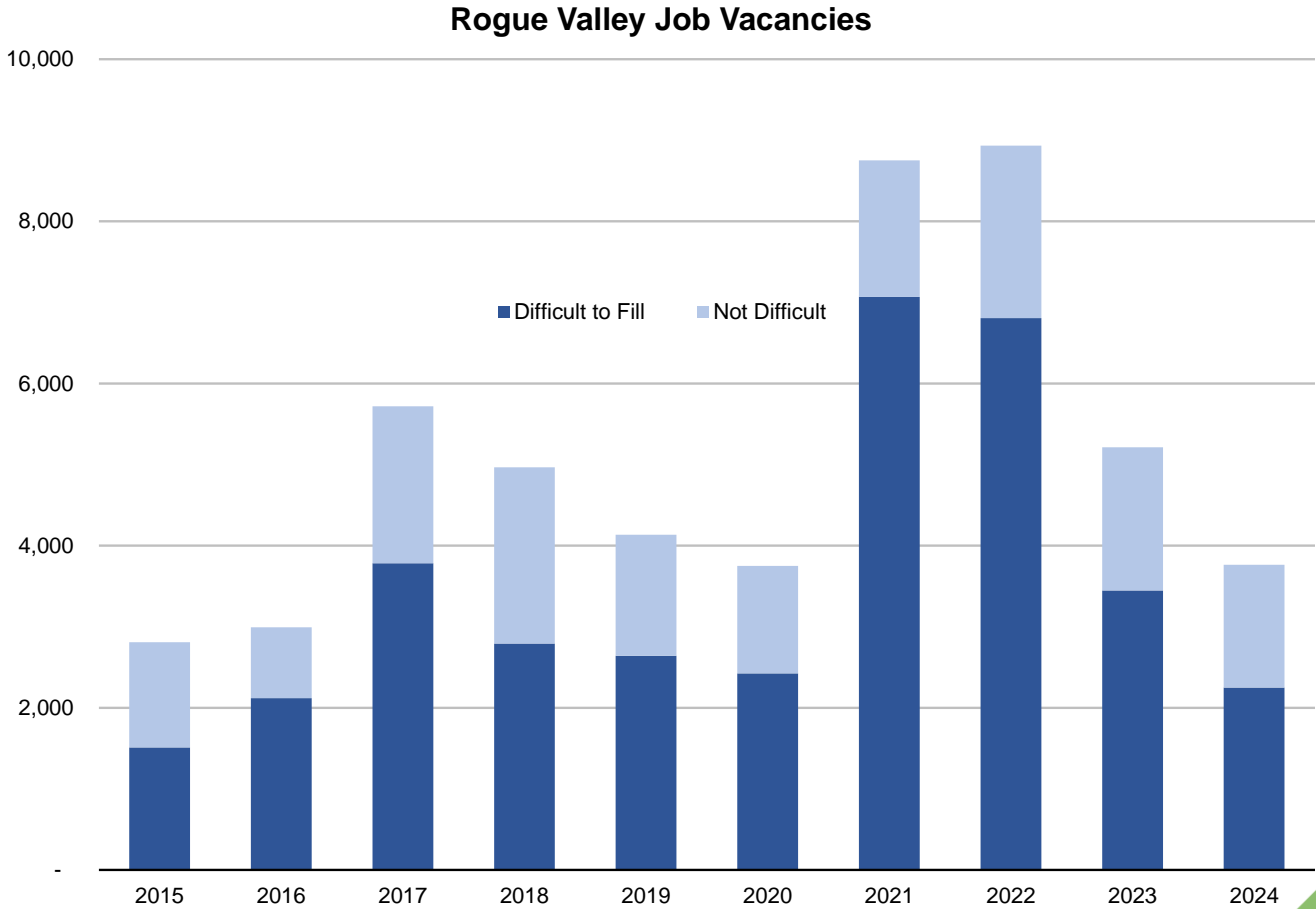
If they were hiring, employers gave details about each vacancy, including:

- 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.

Source: Oregon Employment Department, Job Vacancy Survey

THE NUMBER OF ROGUE VALLEY VACANCIES DROPPED TO PRE-PANDEMIC LEVELS AFTER RECORD HIGHS IN 2021 AND 2022



Source: Oregon Employment Department

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

Rogue Valley Job Vacancies by Industry, 2024

Industry	Vacancies	Average Wage
All Industries	3,763	\$23.82
Health care and social assistance	1,568	\$27.95
Manufacturing	366	\$26.44
Leisure and hospitality	340	\$15.79
Management, administrative, and waste services	308	\$21.67
Transportation, warehousing, and utilities	275	\$21.59
Retail trade	204	\$18.49
Financial activities	184	\$20.04
Professional, scientific, and technical services	134	\$32.42
Other services	127	\$14.56
Construction	75	\$26.67
Information	75	\$20.51
Natural resources and mining	45	\$32.00
Wholesale trade	34	n/a
Private educational services	28	n/a

Source: Oregon Employment Department

AREA BUSINESSES WERE HIRING FOR A VARIETY OF JOBS ACROSS THE ECONOMY IN 2024. THEY REPORTED VACANCIES FOR 148 DIFFERENT OCCUPATIONS

Top Rogue Valley Occupations
With the Highest Number of Job Vacancies, 2024

Occupation	Vacancies
All Occupations	3,763
Personal Care Aides	247
Fast Food and Counter Workers	149
Dental Assistants	134
Physical Therapist Assistants	125
Occupational Therapy Assistants	120
Occupational Therapists	115
Physical Therapists	114
Heavy and Tractor-Trailer Truck Drivers	113
Insurance Sales Agents	99
Light Truck Drivers	85

Source: Oregon Employment Department

EMPLOYERS HAD MORE DIFFICULTY FILLING VACANCIES IN SOME OCCUPATIONS

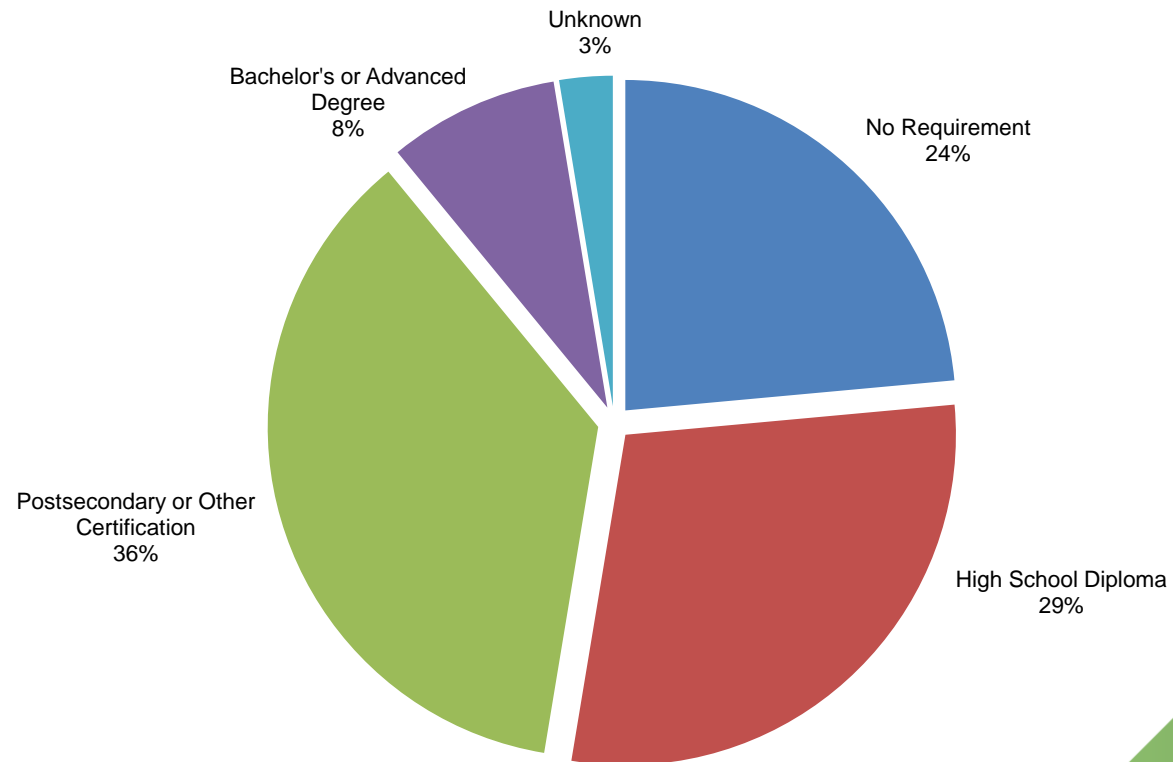
Top Rogue Valley Occupations With the Highest Number of Difficult-to-Fill Job Vacancies, 2024

Occupation	Vacancies
Difficult-to-Fill Vacancies in All Occupations	2,250
Personal Care Aides	163
Dental Assistants	129
Fast Food and Counter Workers	115
Heavy and Tractor-Trailer Truck Drivers	113
Insurance Sales Agents	79
Landscaping and Groundskeeping Workers	65
Cooks, Restaurant	55
Nursing Assistants	50
Dental Hygienists	50
Advertising Sales Agents	45

Source: Oregon Employment Department

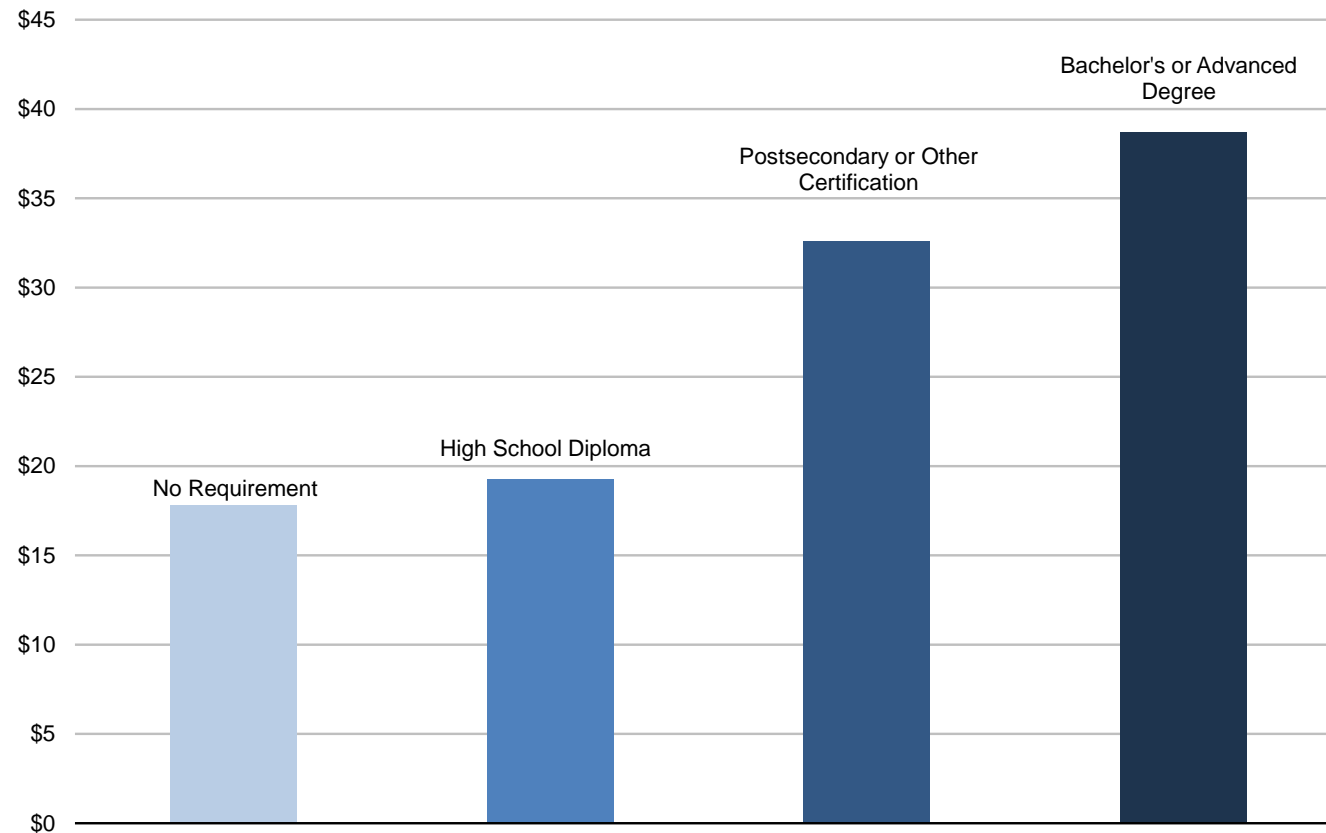
53% OF THE ROGUE VALLEY JOB VACANCIES REQUIRED NO EDUCATION BEYOND HIGH SCHOOL

Rogue Valley Job Vacancies by Education Requirement, 2024



AVERAGE HOURLY WAGES GENERALLY INCREASE ALONG WITH EDUCATION REQUIREMENTS FOR JOB VACANCIES

Average Hourly Wage for Rogue Valley Job Vacancies by Education Requirement, 2024



Source: Oregon Employment Department

PROJECTED GROWTH

Oregon's total employment will grow by 8% between 2023 and 2033.

- Growth reflects structural growth, as total payroll employment had recovered from the pandemic recession by 2023.
- 170,000 new jobs over the decade.
- 265,000 average annual total job openings, mostly to replace workers who leave the labor force or transfer into significantly different occupations.

Health care and social assistance is projected to grow the fastest and add the largest number of jobs.

- Private health care and social assistance accounts for one out of every five new jobs in Oregon by 2033.

Construction is also projected to grow the fastest.

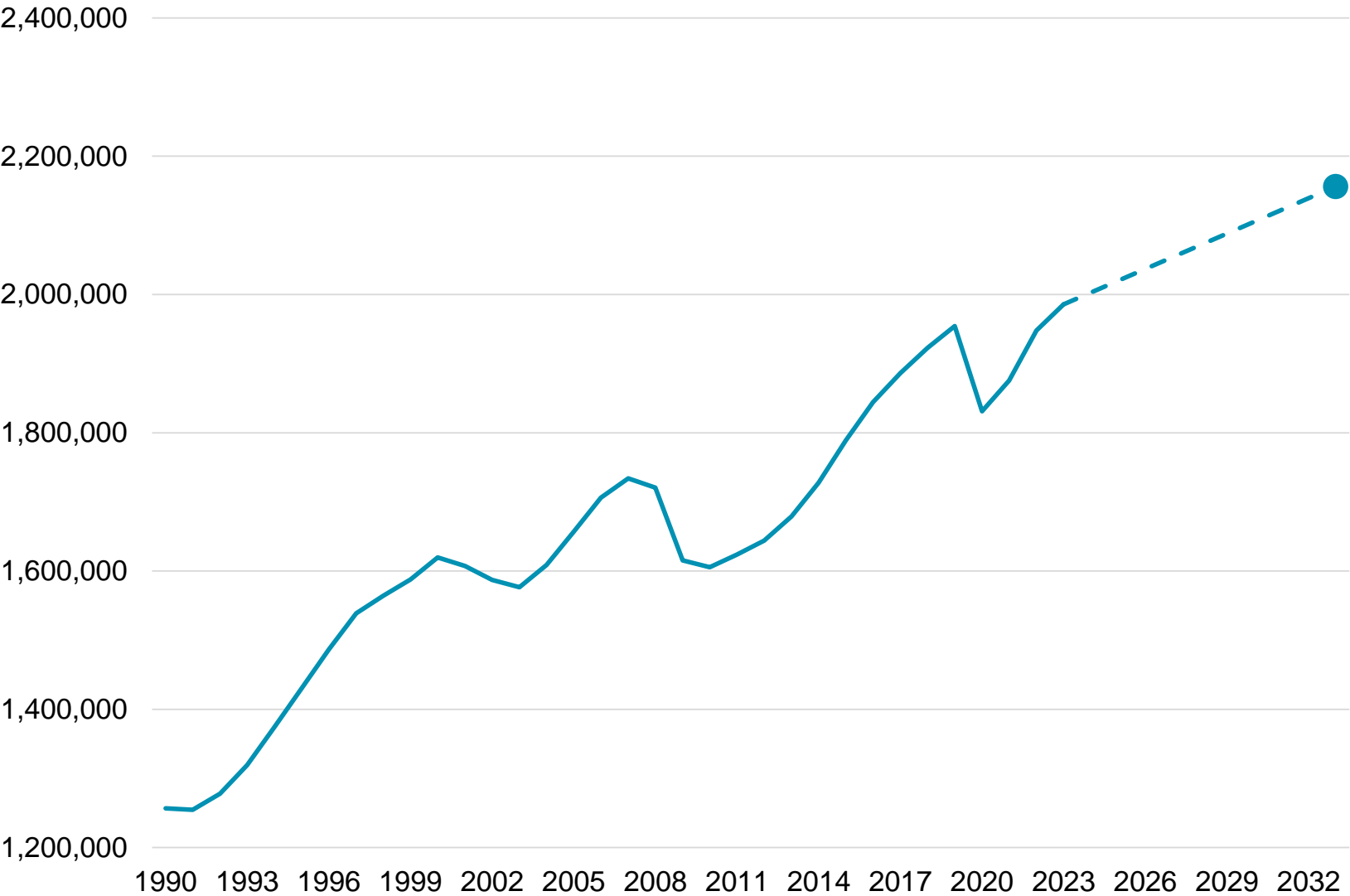
- Growth in construction is driven by strong projected growth in the specialty trades industry.

A broad array of future career opportunities exist across Oregon's economy.

- All sectors statewide and all regions of the state are expected to add jobs except for Federal government, which is projected to decline by 1%.
- Even slower-growing sectors and regions need an abundance of newly trained workers to replace those who retire or otherwise leave the labor force.

OREGON'S TOTAL EMPLOYMENT IS PROJECTED TO GROW BY 8%

Oregon to Add 170,000 New Jobs by 2033



Private-sector growth of 150,500 jobs (9%)

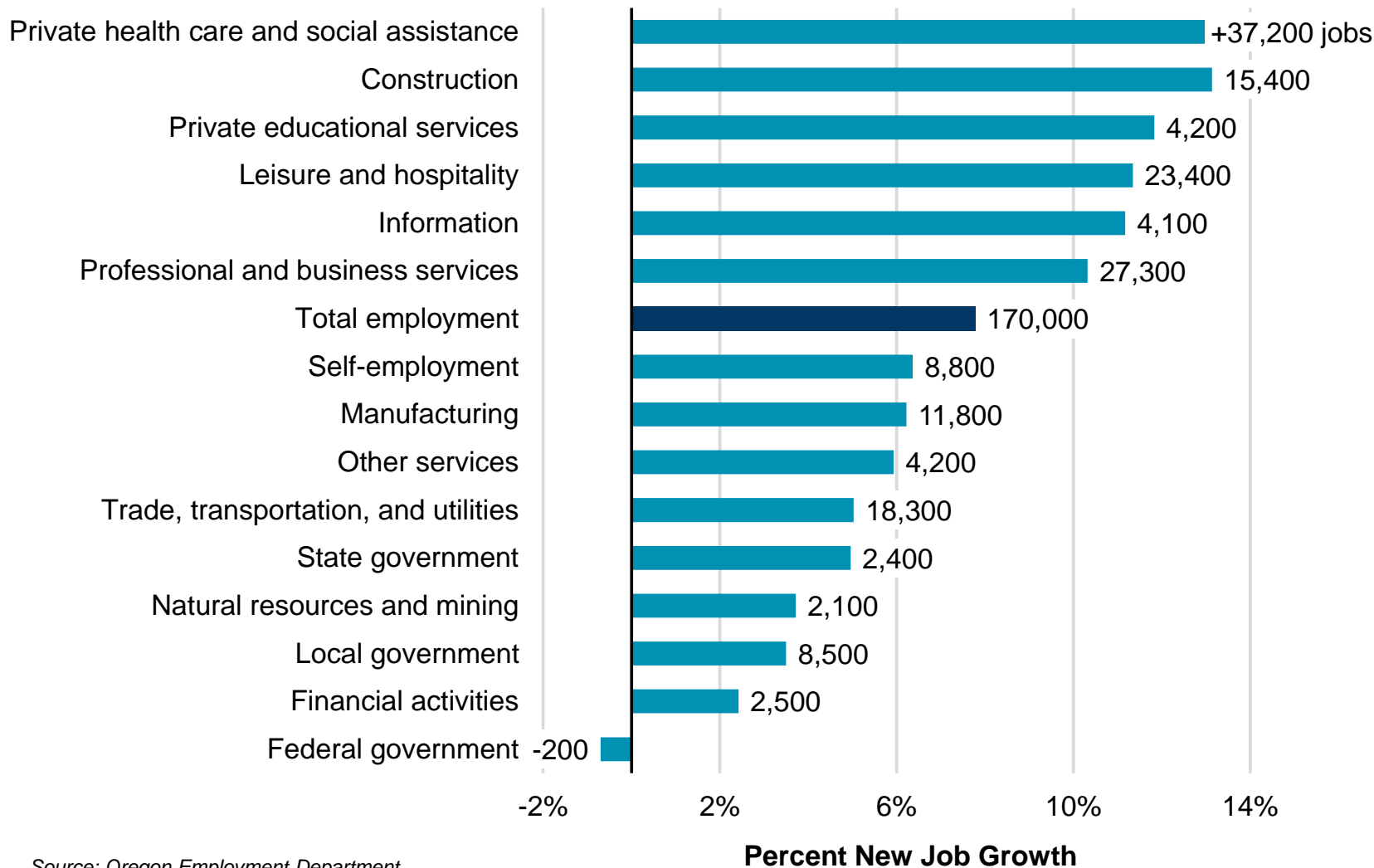
Slower growth in government, adding 10,700 jobs (3%)

Additional 8,800 self-employed Oregonians (6%)

Source: Oregon Employment Department

HEALTH CARE AND SOCIAL ASSISTANCE LEADS LONG-TERM INDUSTRY GROWTH

Health Care and Social Assistance Leads Long-Term Employment Growth
Oregon Industry Projections, 2023-2033



Health care and social assistance and construction are projected to grow the fastest (13% each).

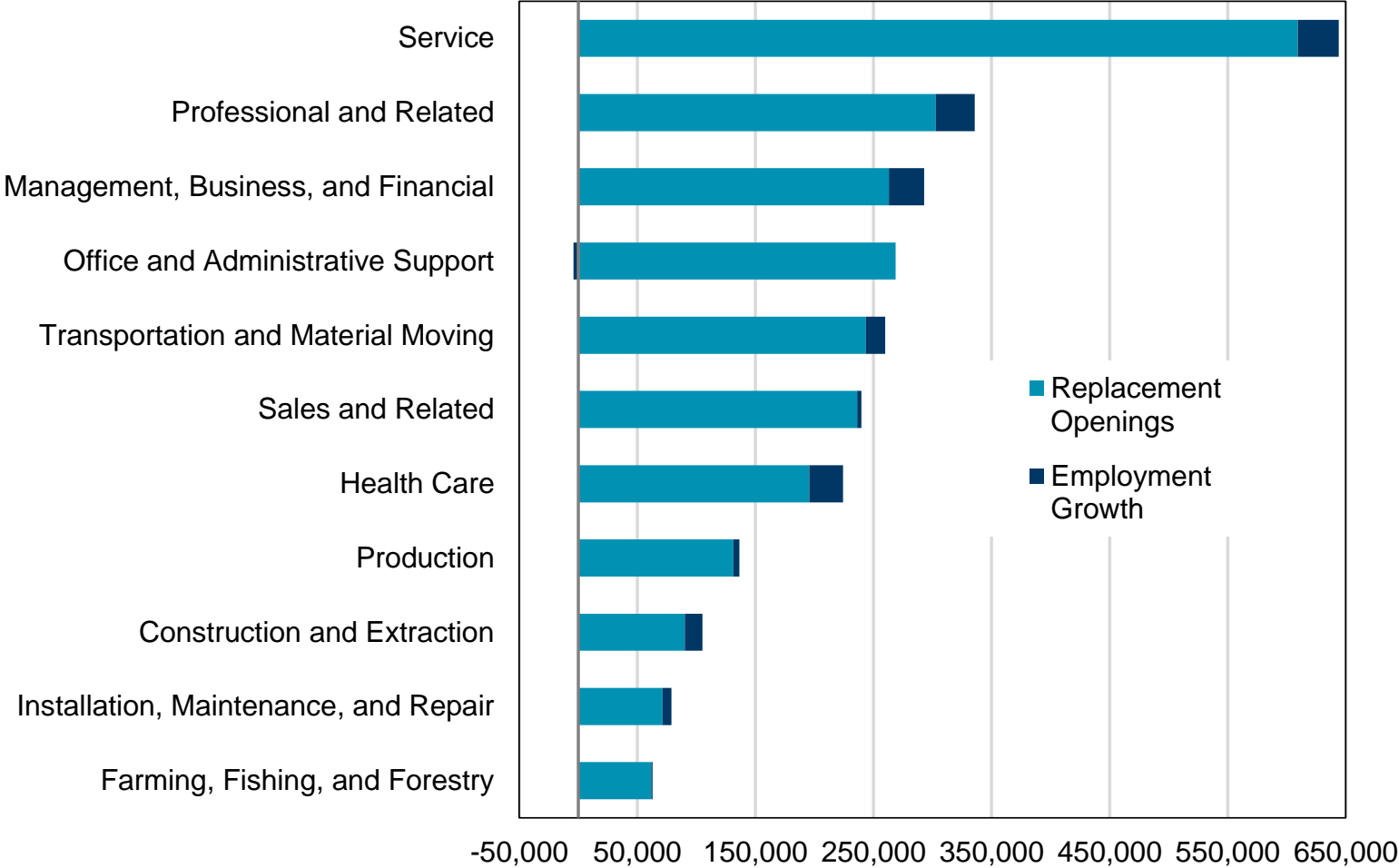
Health care and social assistance is also projected to add the largest number of jobs over the decade.

Growth in leisure and hospitality is driven by recovery from the pandemic.

Source: Oregon Employment Department

NINE OUT OF 10 TOTAL JOB OPENINGS ARE REPLACEMENT OPENINGS

Job Openings by Occupational Group in Oregon, 2023-2033

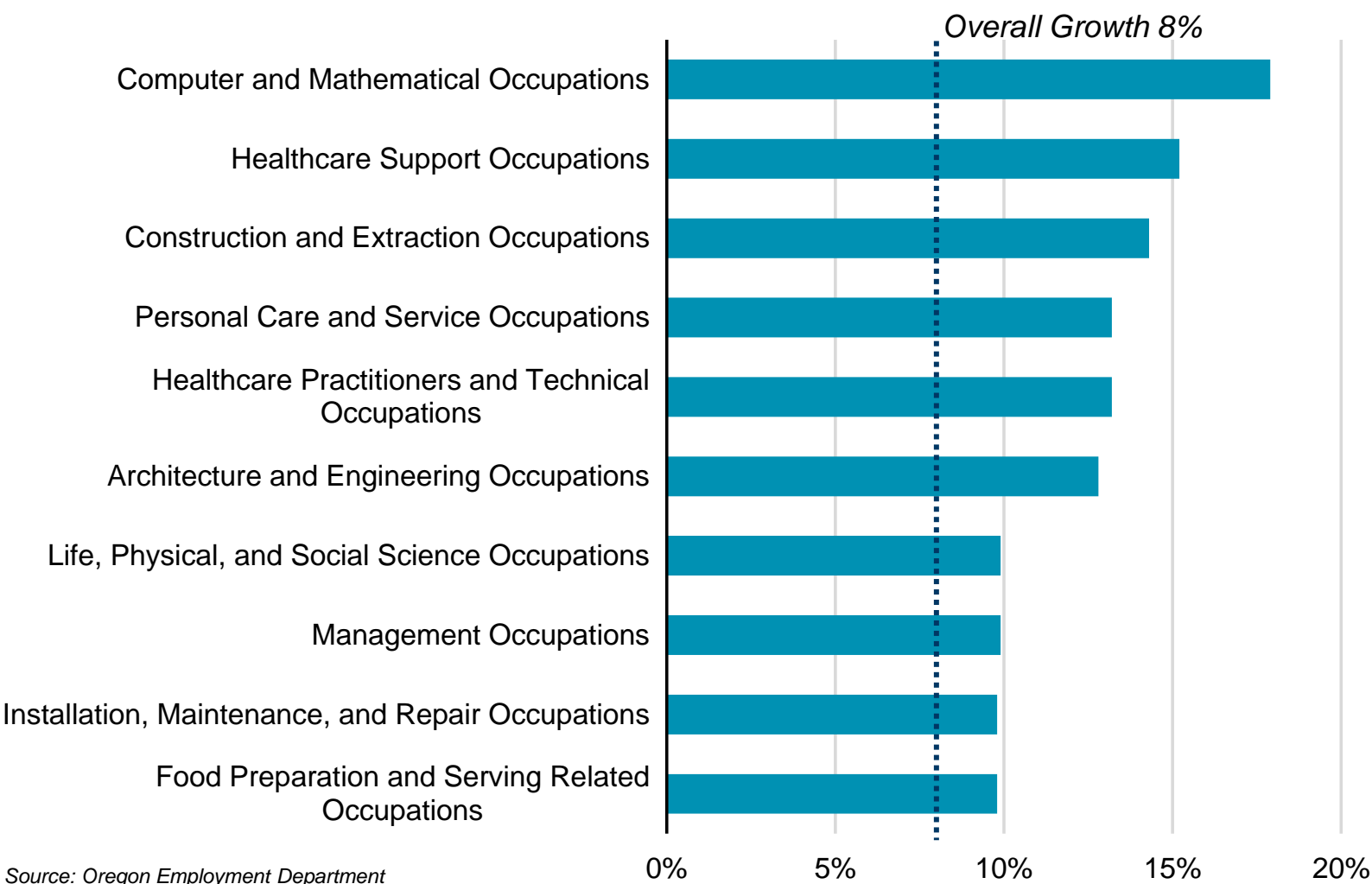


Service occupations (which include food preparation and serving workers, personal appearance workers, protective services, and building and grounds cleaning) rank first in most job openings. The fast growth in service occupations is mainly caused by the job losses incurred in 2020.

Source: Oregon Employment Department

COMPUTER AND MATHEMATICAL OCCUPATIONS LEAD OCCUPATIONAL GROWTH

Fastest-Growing Occupational Groups in Oregon, 2023-2033



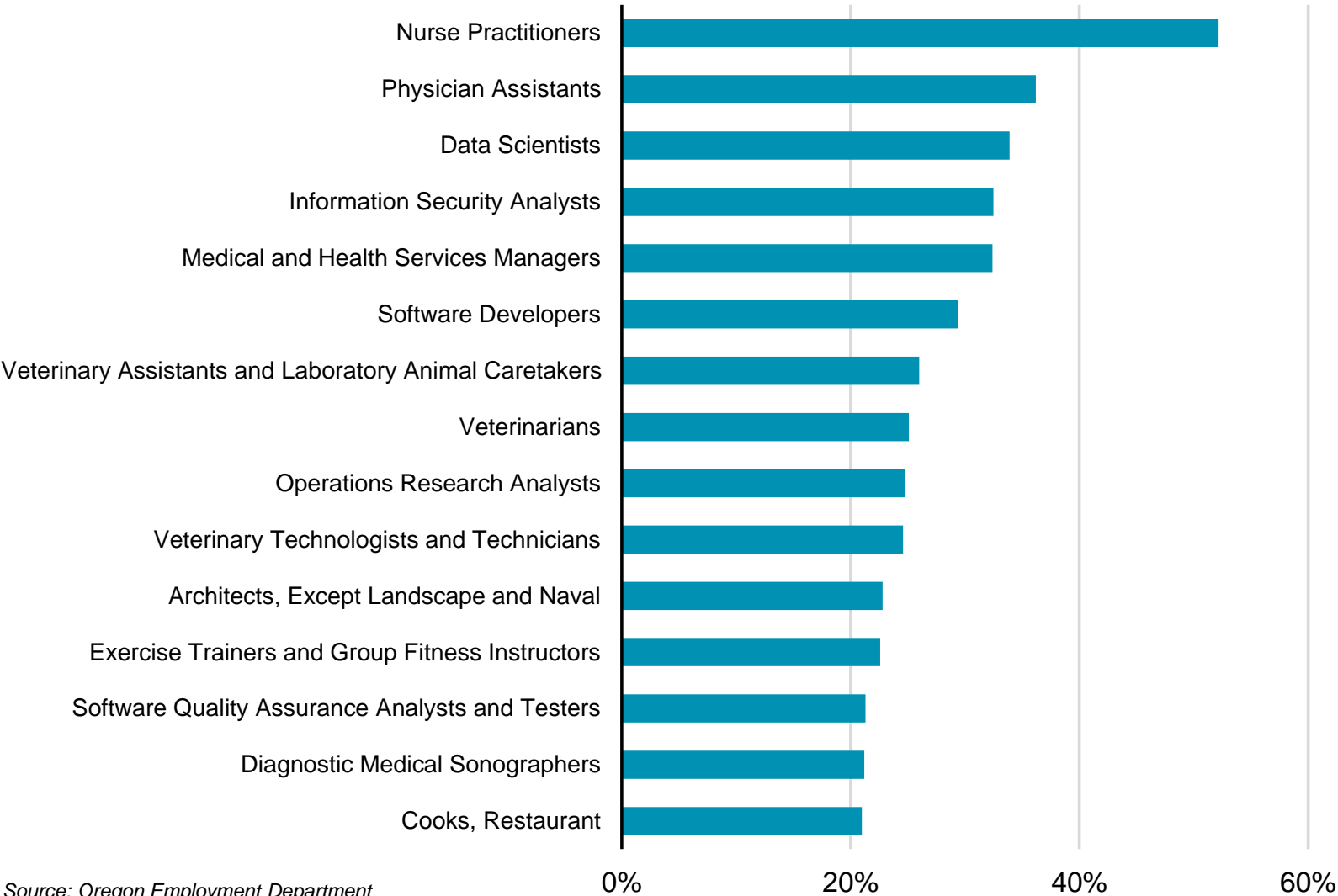
Computer and mathematical occupations are the fastest-growing occupational group at 18%.

The health care support occupational group is projected to grow the second fastest at 15.2%. The growing elderly population, which typically has increased healthcare needs compared to younger groups, will in turn increase demand for caregiving and therapy services.

Source: Oregon Employment Department

FASTEST-GROWING OCCUPATIONS

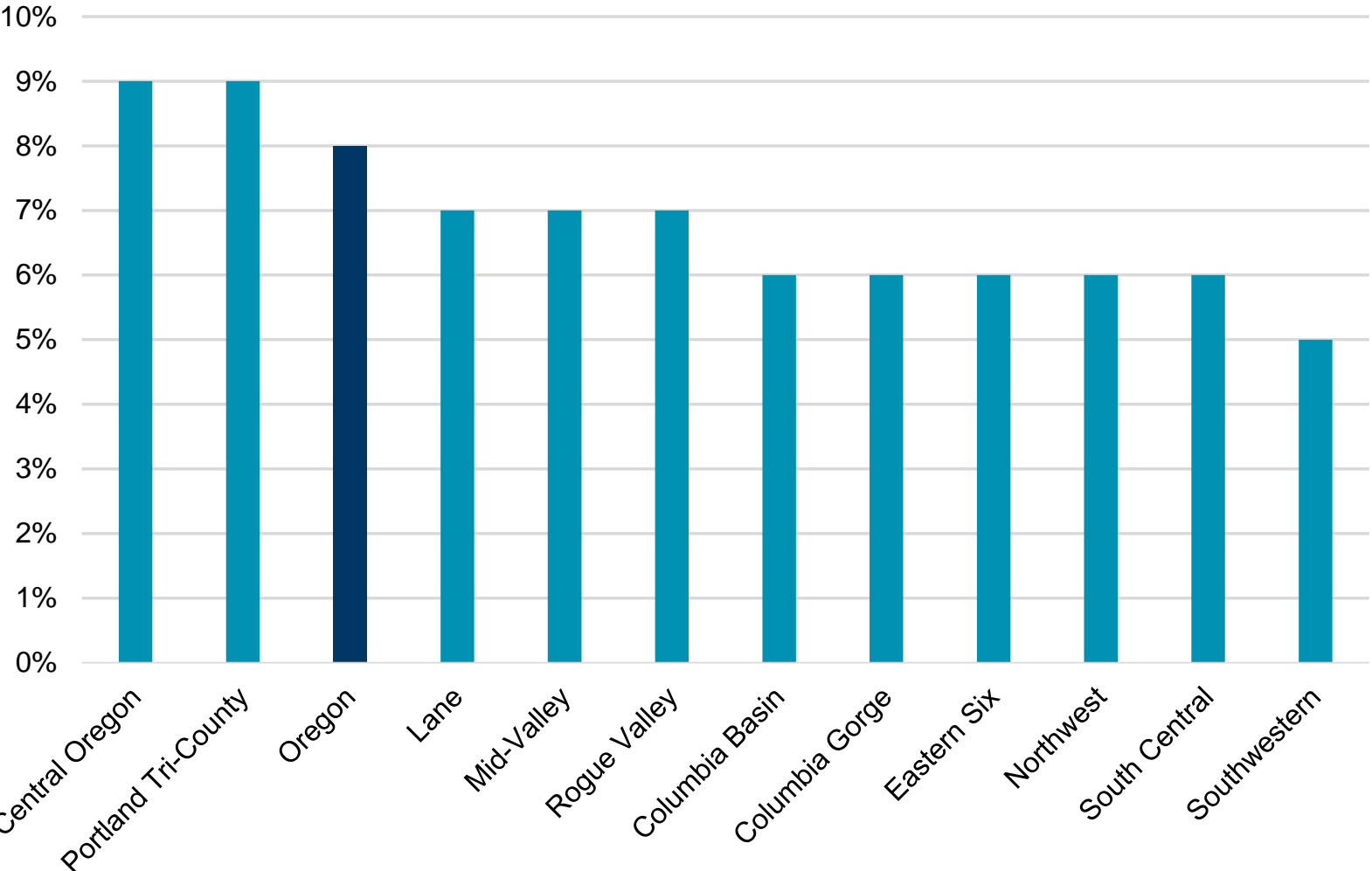
Fastest-Growing Occupations, 2023-2033



Health care occupations and those associated with health care (including mental health and animal health) accounted for seven of the 15 fastest-growing occupations.

Computer and mathematical occupations comprise five of the 15 fastest-growing occupations.

Long-Term Employment Growth Led by Central Oregon and Portland Tri-County Regions



The two areas projected to grow faster than Oregon's rate of 8% are Central Oregon (9%) and the Portland Tri-County region (9%).

Southwestern Oregon (5%) is projected to grow the slowest.

Source: Oregon Employment Department

ADDITIONAL RESOURCES

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



July 2024

DEMOGRAPHIC DROUGHT

The Rising Storm

Building a Future-Ready Workforce to Withstand
the Looming Labor Shortage



Lightcast
Future-Ready Workforce Collection

Career and job search information

CAREERS

QualityInfo.org

OREGON 2025

**TIME TO
STAND OUT**

State of Oregon
Employment Department

Disponible
en Español



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

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