

ROGUE VALLEY ECONOMIC AND WORKFORCE UPDATE

ROGUE VALLEY WORKFORCE INVESTMENT BOARD MEETING

8-1-25

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

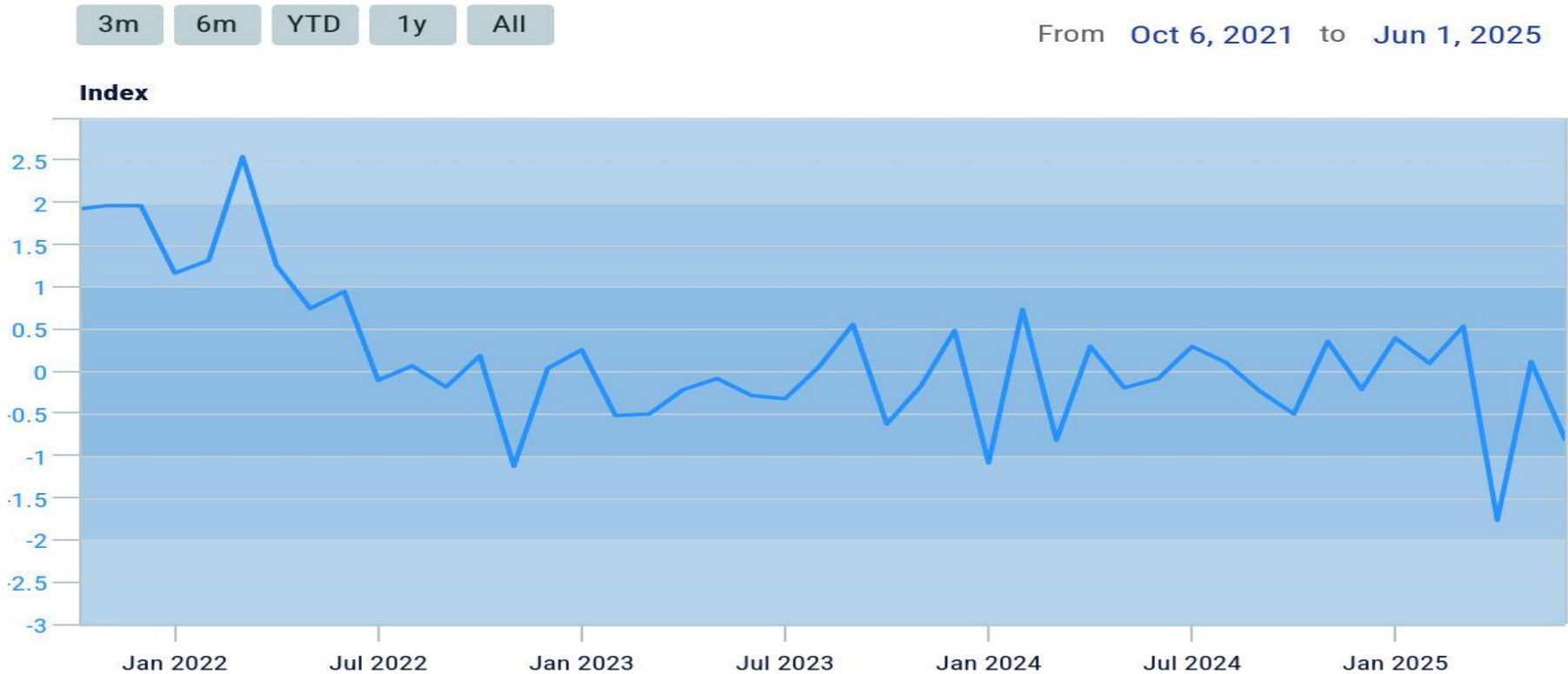
** Collected and produced by Oregon Employment Department*

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!

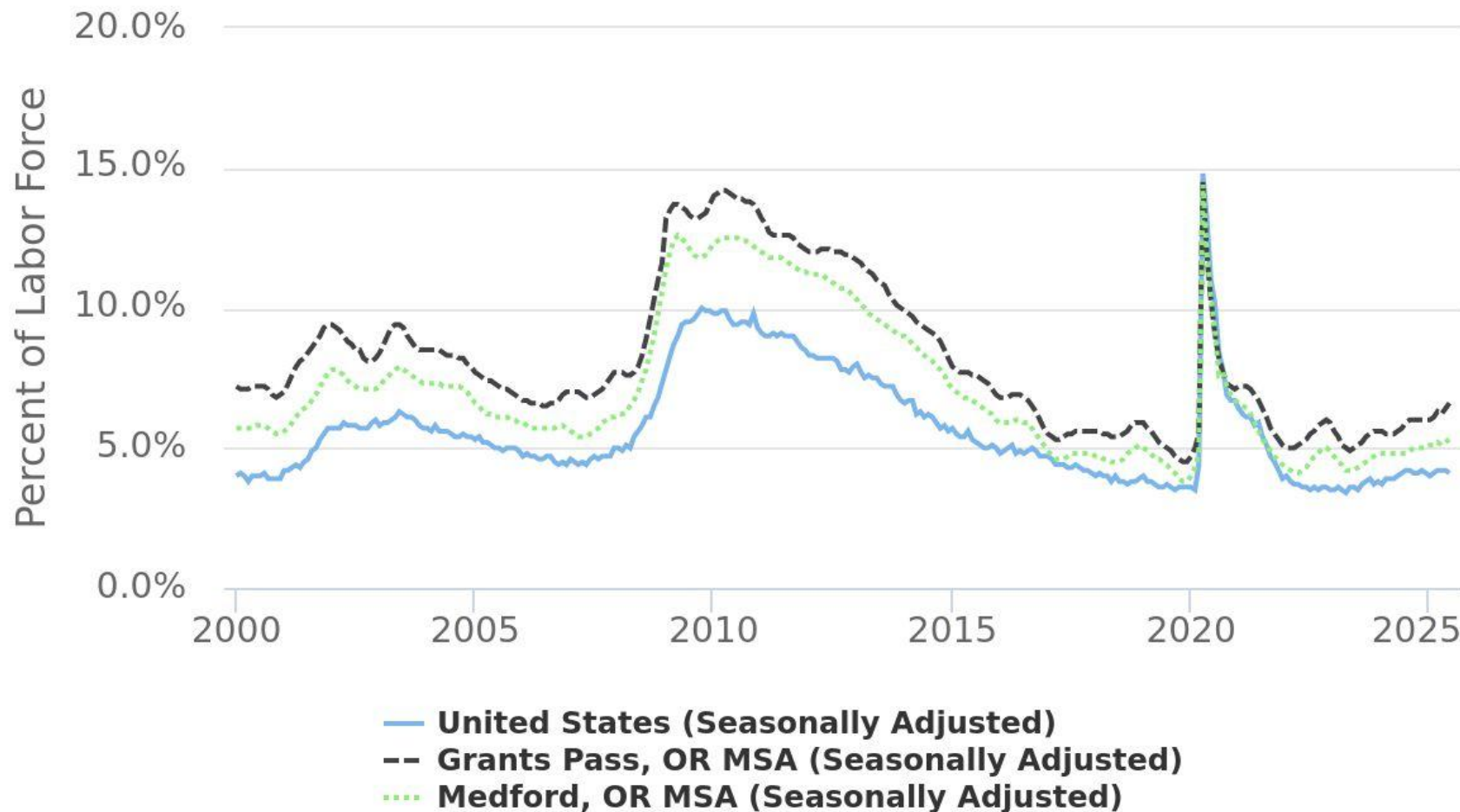
CENSUS BUREAU INDEX OF ECONOMIC ACTIVITY



The U.S. Census Bureau Index of Economic Activity (IDEA) is an aggregation of 15 of the Census Bureau's primary economic data series that provides a single time series constructed as a weighted average.

Unemployment rates are rising slightly over the year in the Rogue Valley-

Unemployment Rate



Jackson = 5.3%

Josephine = 6.6%

U.S.=4.1%

June 2025

KEY FACTS FROM RECENT NEWS RELEASE

Oregon's unemployment rate was 4.9% in June.

- That was 1.3 percentage points higher than the recent low of 3.6% in spring 2023.
- That was also higher than the U.S. unemployment rate of 4.1% in June.

Oregon nonfarm payroll employment declined by 4,300 jobs in June.

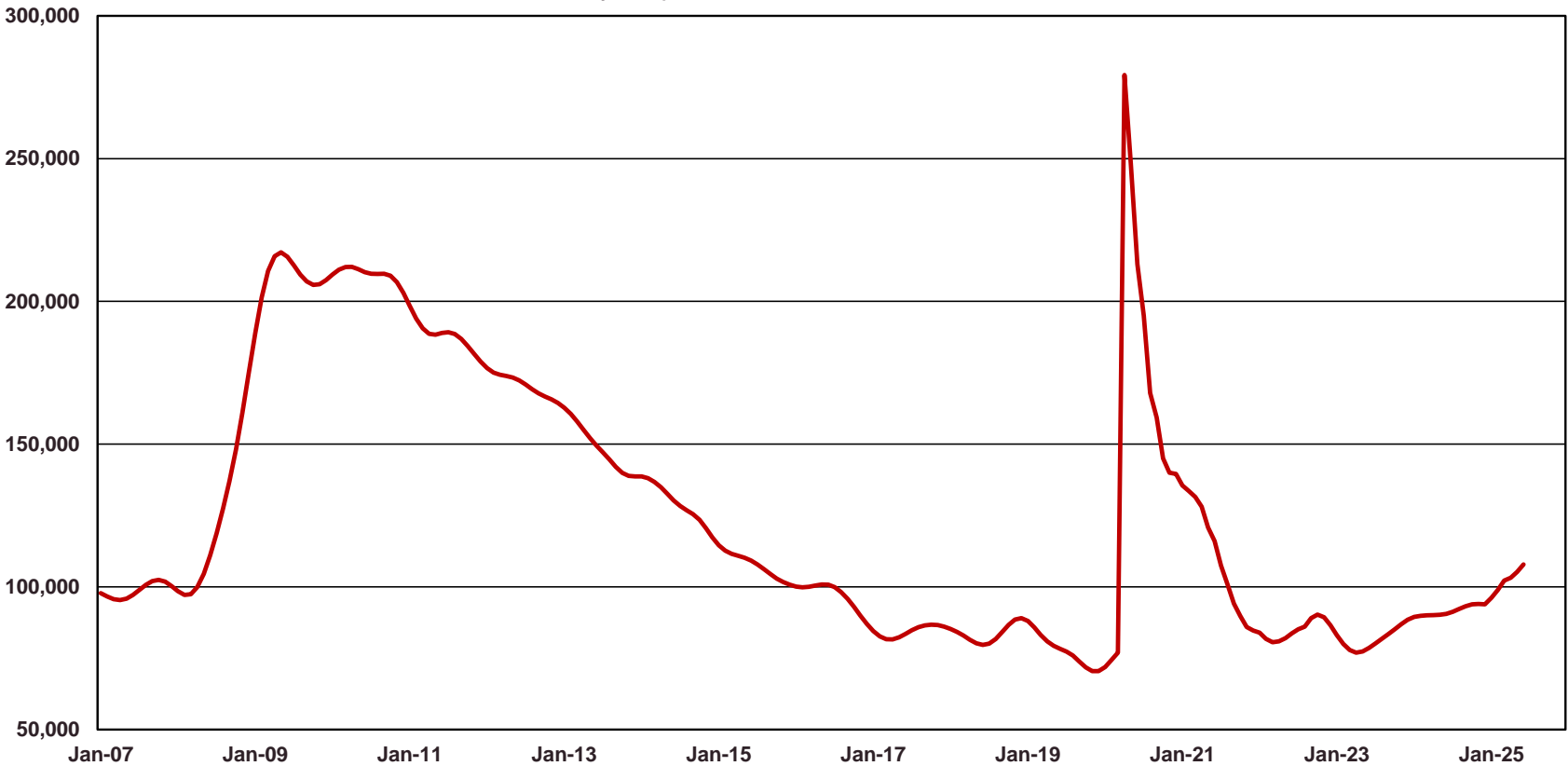
- June's losses were largest in other services (-1,400 jobs); manufacturing (-1,200); and leisure and hospitality (-1,000 jobs).
- Health care and social assistance added 900 jobs.

Employers added 8,700 nonfarm payroll jobs over the past year, a gain of 0.4%.

- Job gains were strongest in health care and social assistance (+15,800 jobs, or 5.3%).
- Meanwhile, manufacturing lost 7,700 jobs over the year, construction dropped 5,200 jobs, and financial activities declined by 2,900 jobs.

THE NUMBER OF UNEMPLOYED OREGONIANS INCREASED BY 2,600 IN JUNE.

Unemployed Persons, Oregon Statewide
Seasonally Adjusted, 2007 to Present



Seasonally Adjusted
Unemployment:

Pre-COVID Low
Nov 2019: 70,500

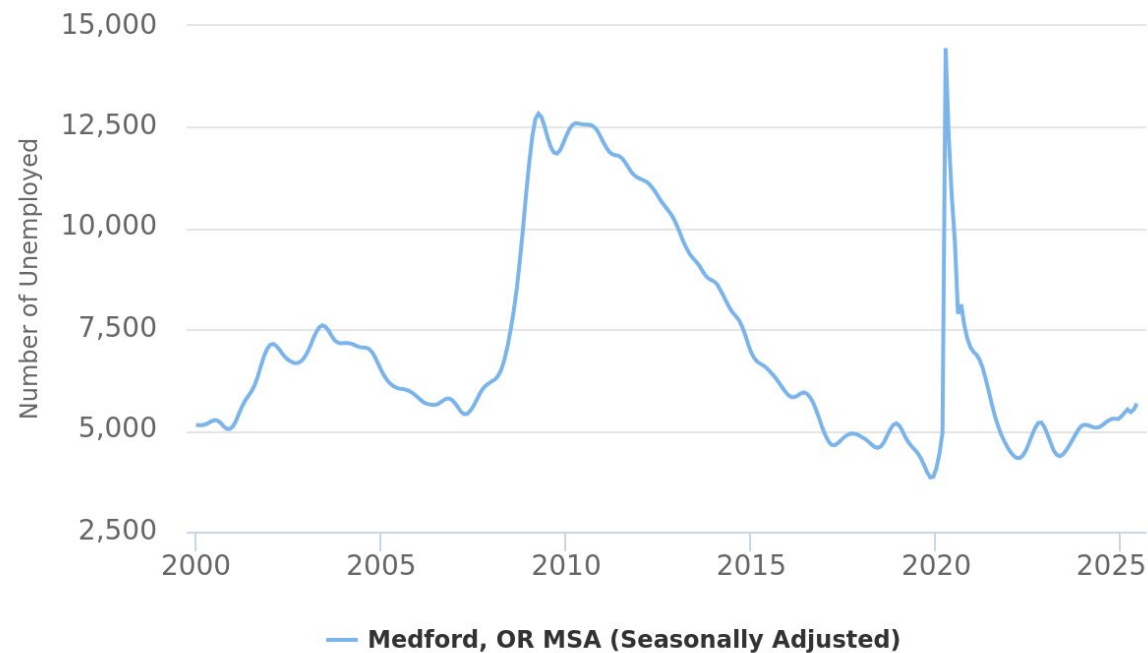
Highest
April 2020: 279,300

Current
June 2025: 107,800

Source: Oregon Employment Department, Local Area Unemployment Statistics

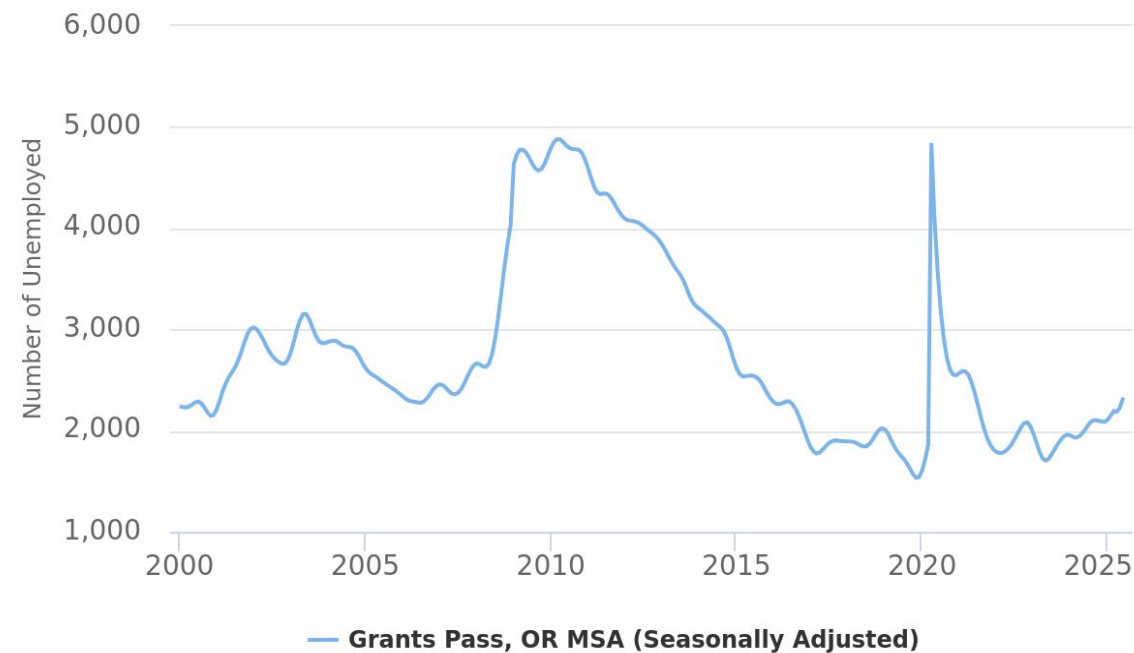
ROGUE VALLEY SEEN RISING NUMBER OF UNEMPLOYED

Number of Unemployed



Source: Oregon Employment Department Qualityinfo.org

Number of Unemployed

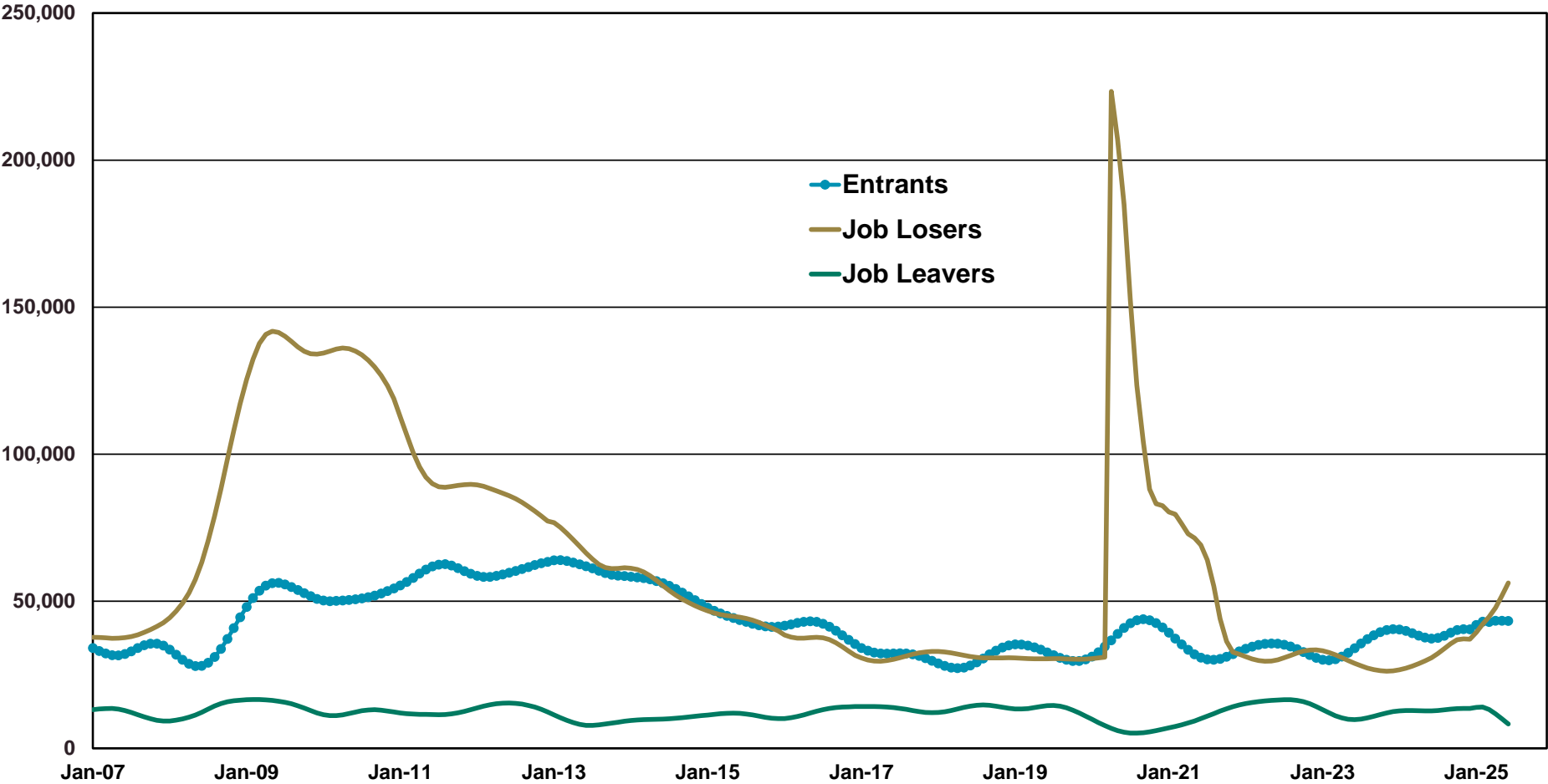


Source: Oregon Employment Department Qualityinfo.org

Jackson County 5,666 Unemployed in June 2025- up from 5,093 one year earlier
Josephine County 2,327 unemployed in June- up from 2,023 in June 2024

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



New or returning to the workforce
43,300 (40%)

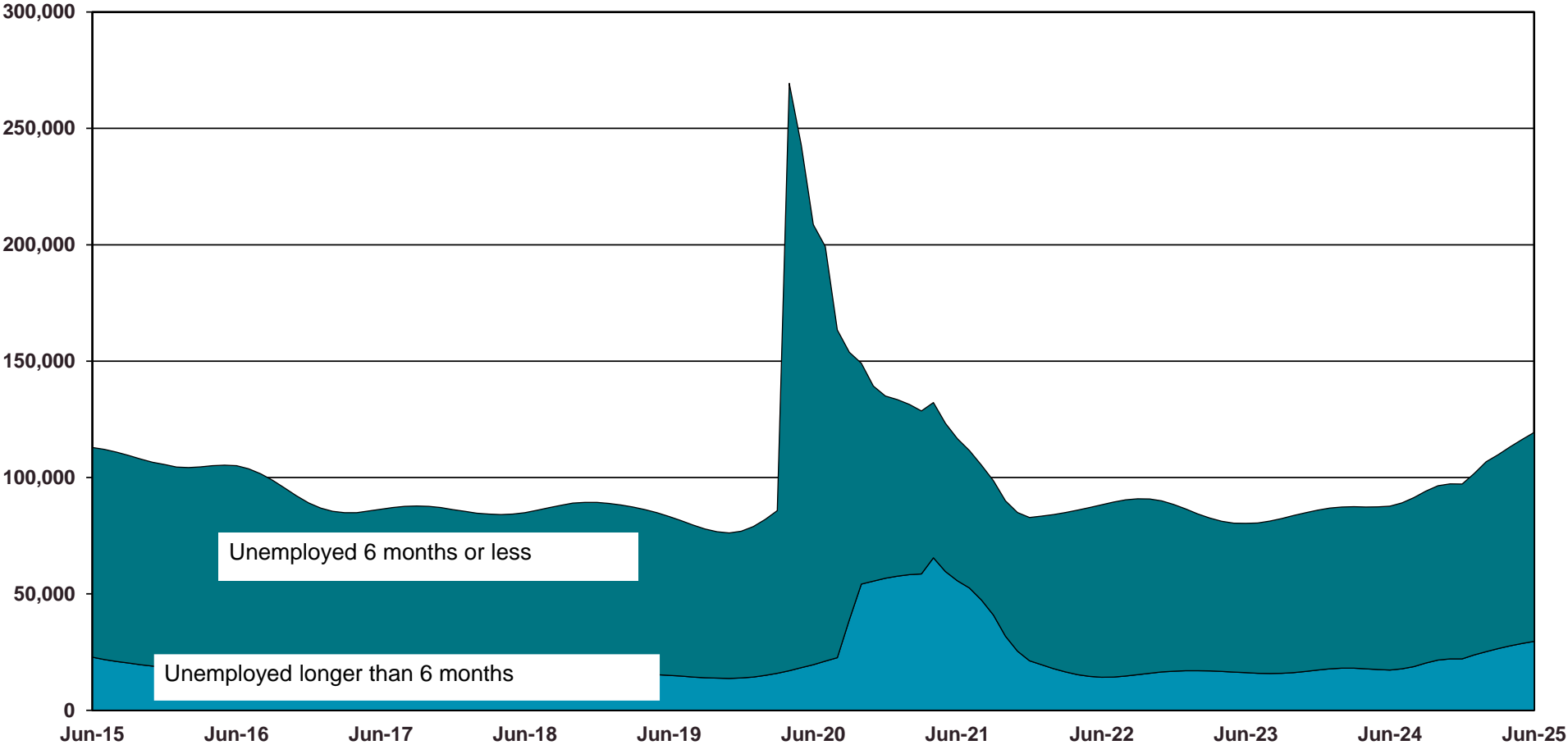
Lost job
56,200 (52%)

Left job voluntarily
8,300 (8%)

Source: Oregon Employment Department, Current Population Survey

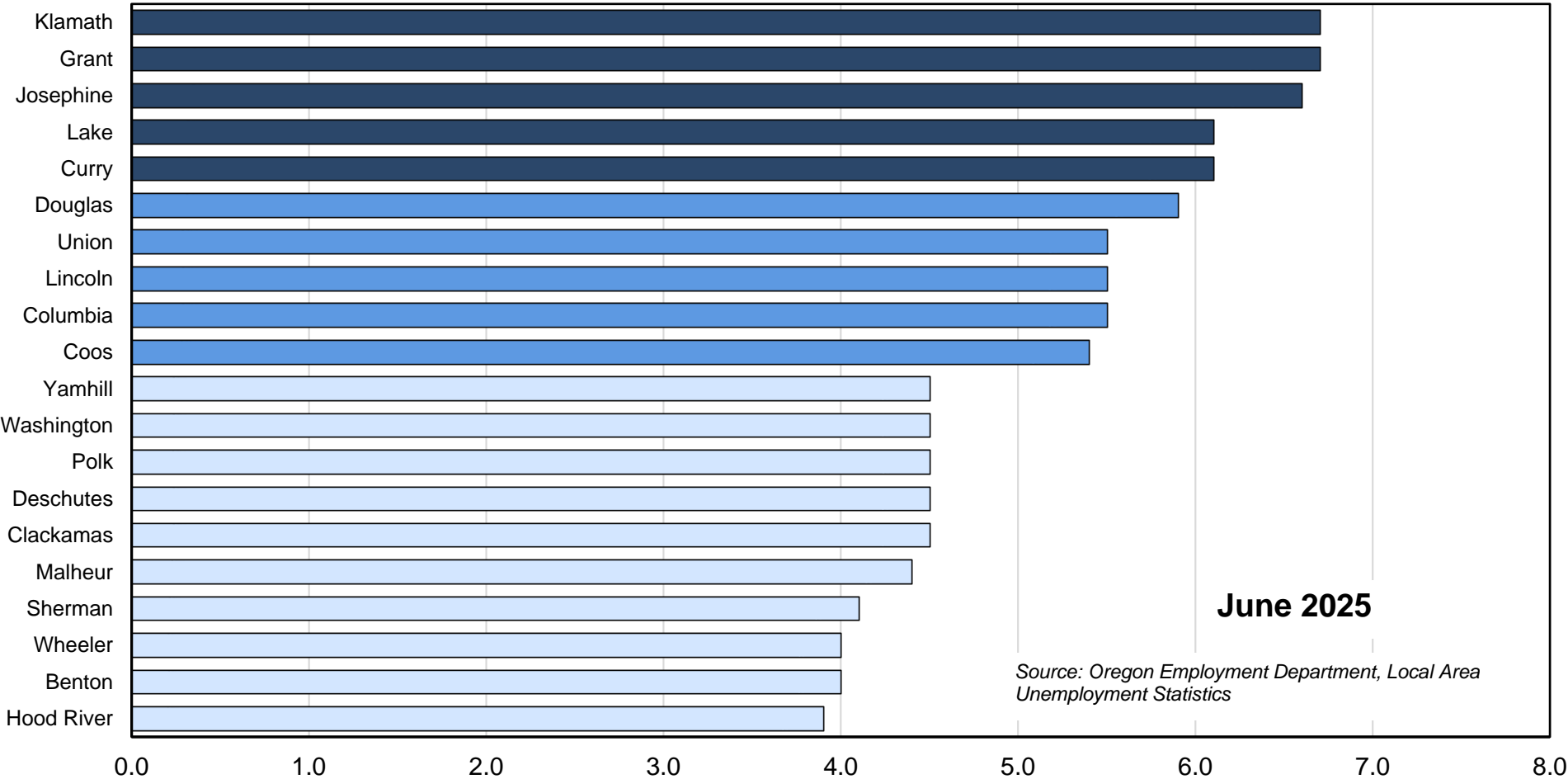
ONE OUT OF FOUR UNEMPLOYED OREGONIANS HAVE BEEN OUT OF WORK FOR AT LEAST SIX MONTHS.

There are 29,600 Long-Term Unemployed Oregonians
(25% of All Unemployed)



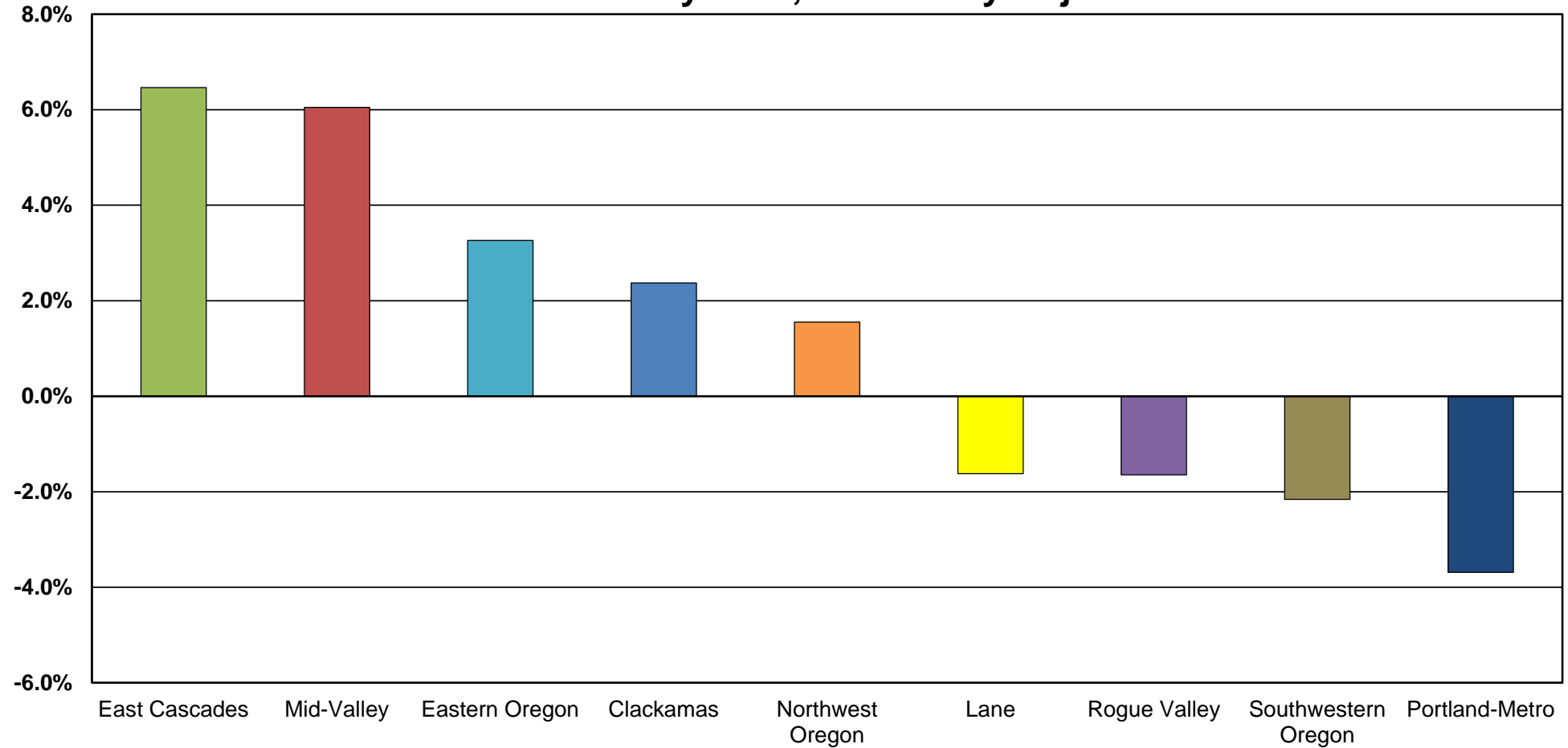
Source: Oregon Employment Department, Local Area Unemployment Statistics

Oregon Unemployment: Ten Highest / Lowest County Rates



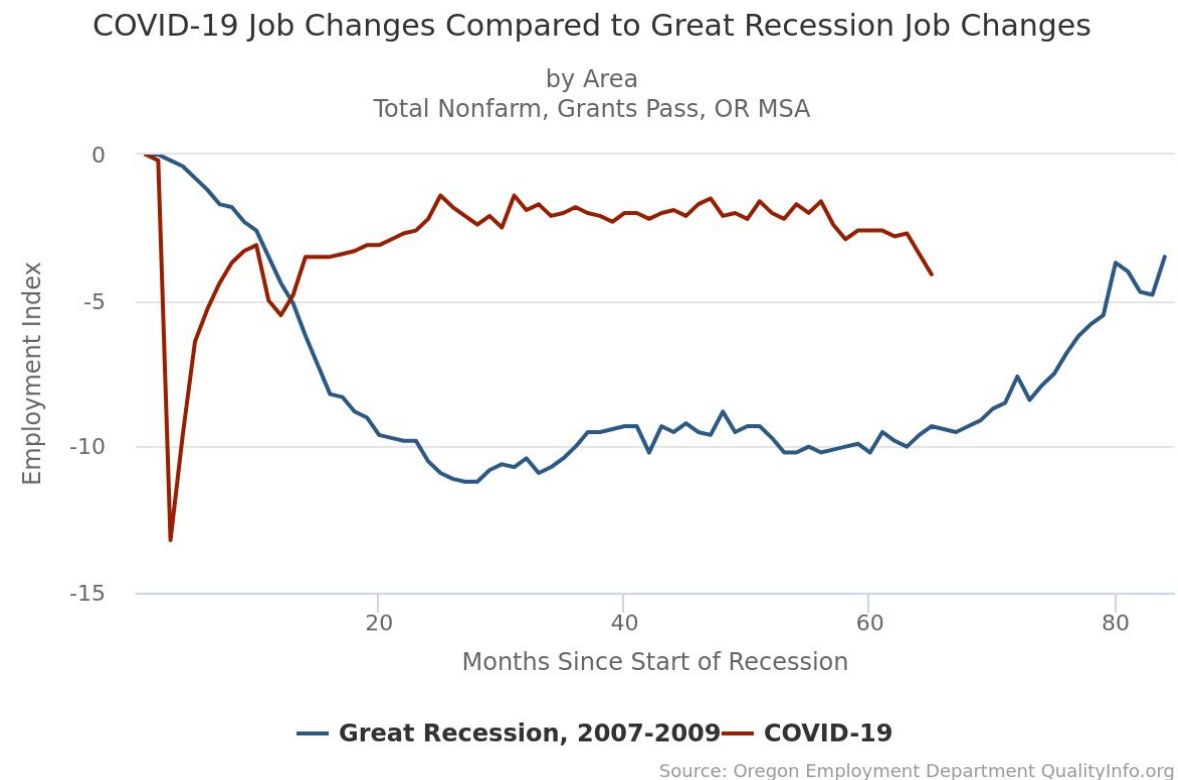
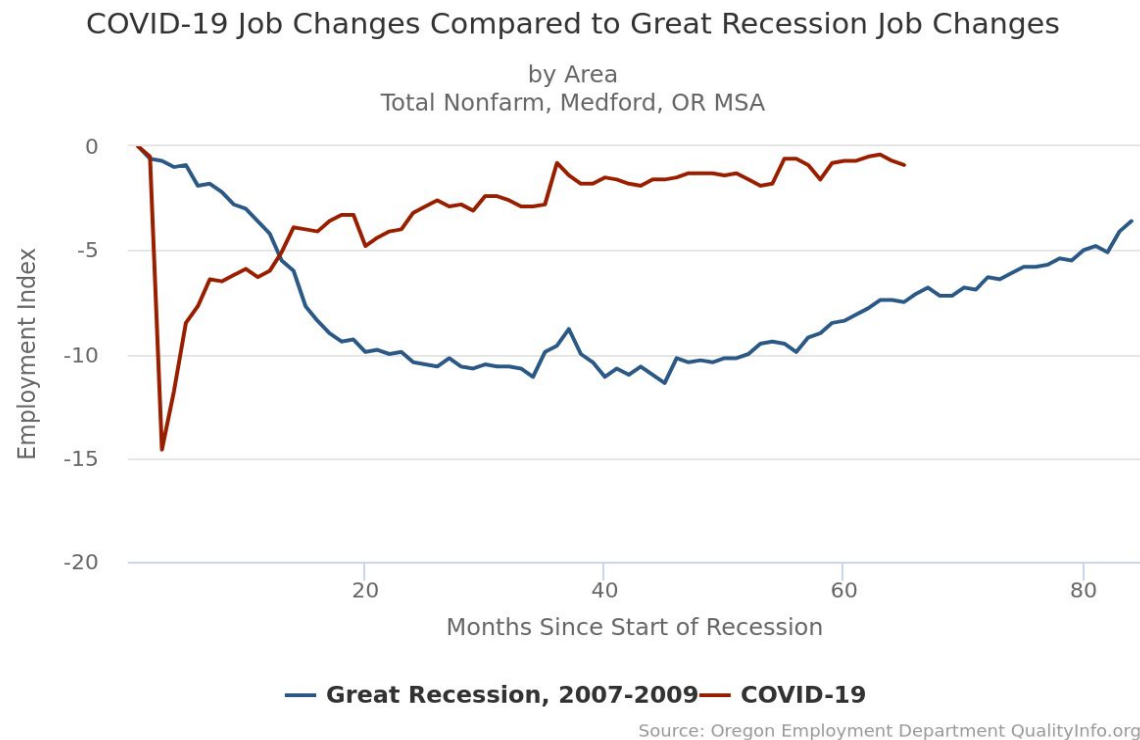
FIVE OF NINE WORKFORCE AREAS HAVE MORE JOBS NOW THAN IN FEBRUARY 2020.

**Job Change Rates by Local Workforce Area as of June 2025
Since February 2020, Seasonally Adjusted**



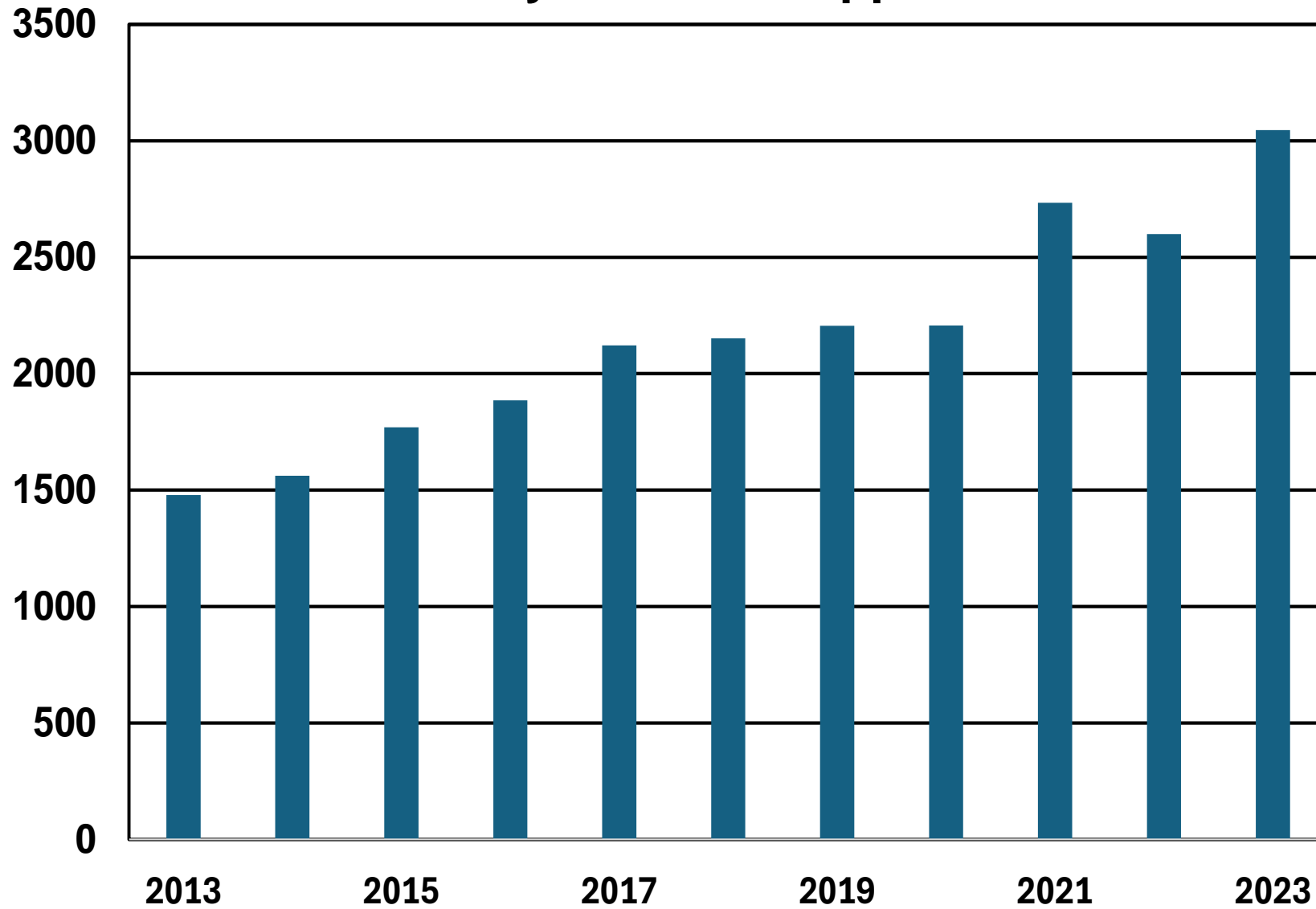
Source: Oregon Employment Department, Current Employment Statistics

Most jobs back that were lost during the pandemic in the Rogue Valley- still a bit below February 2020 – seasonally adjusted



Jackson County down -0.9%, Josephine down -4.1 % (seasonally adjusted)

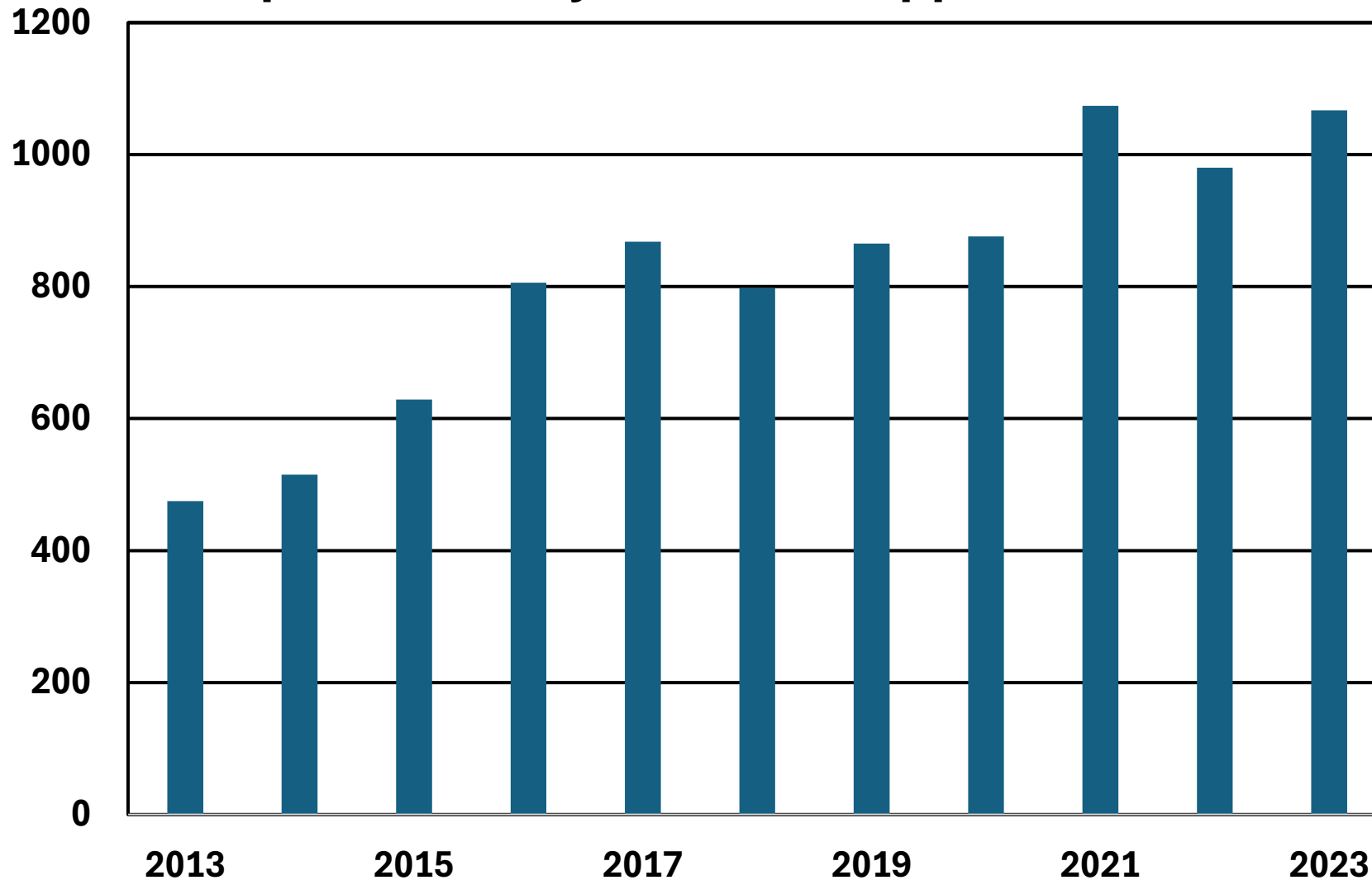
Jackson County Business Applications



Jackson
County
Business
Applications
up 17.2%
from 2022-
2023

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

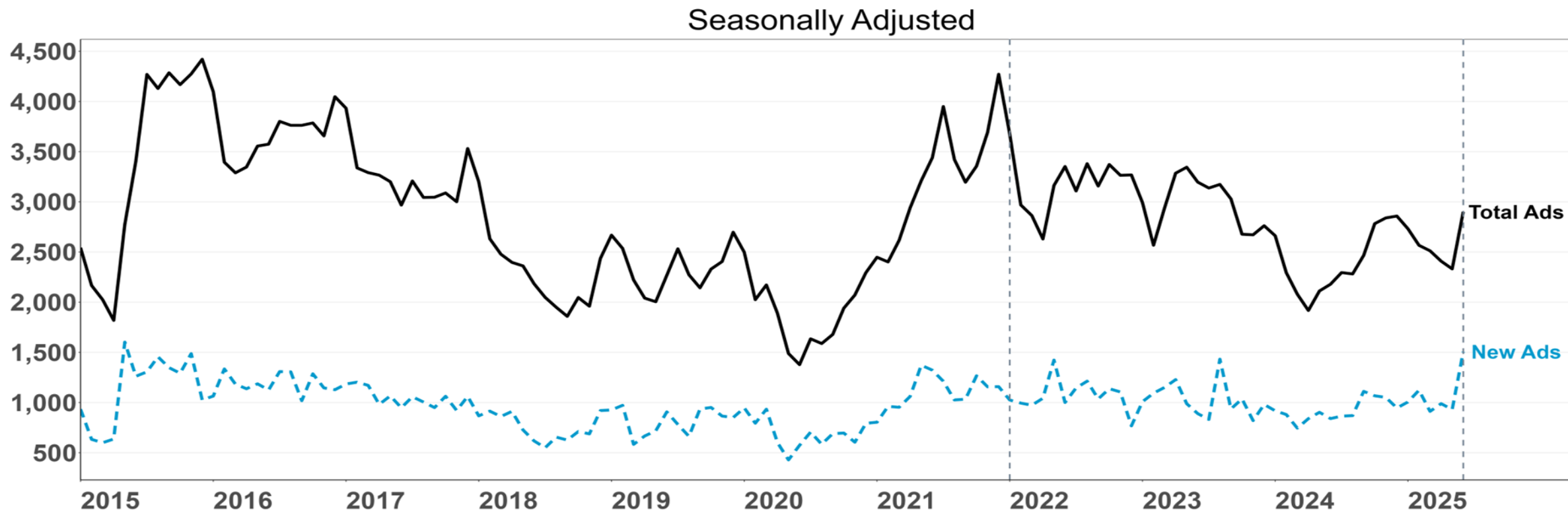
Josephine County Business Applications



Josephine
County
Business
Applications
rose 8.9%
2022 to 2023

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

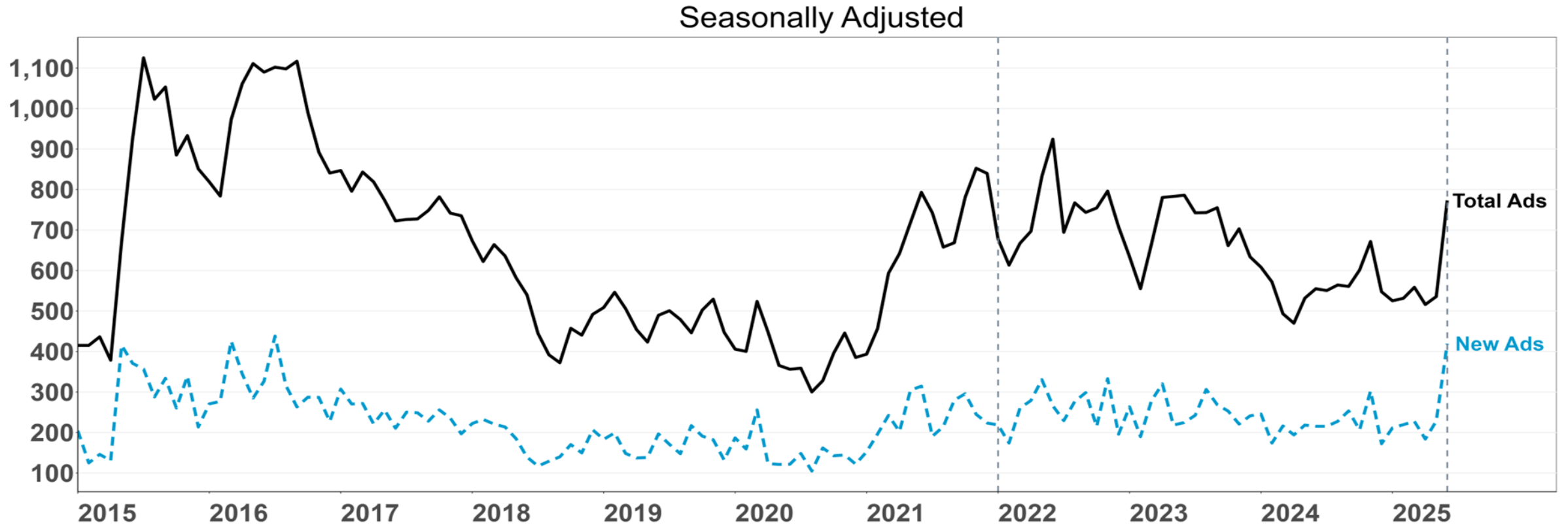
**The number of online ads in the Medford metro area was 2,900 in June.
The number of new ads increased by 580 over the month.**



Source: The Conference Board Help Wanted OnLine® (HWOL)

Note: Dotted lines indicate methodological changes occurring in January 2022 and June 2025

**The number of online ads in the Grants Pass metro area was 770 in June.
The number of new ads increased by 190 over the month.**



Source: The Conference Board Help Wanted OnLine® (HWOL)

Note: Dotted lines indicate methodological changes occurring in January 2022 and June 2025

JOB VACANCIES HAVE DECREASED SINCE 2023 IN ALL AREAS OF THE STATE.

Oregon Job Vacancies by Geography, 2019-2024

Geography	2019	2020	2021	2022	2023	2024	Change from 2023
Oregon Statewide	57,241	44,408	96,887	103,977	72,815	57,767	-21%
Portland Metro	21,218	13,429	28,014	30,991	21,685	16,941	-22%
Mid-Valley	7,091	6,995	12,681	15,083	9,190	8,382	-9%
East Cascades	5,673	4,402	10,771	10,697	9,024	5,941	-34%
Clackamas	5,795	3,921	10,088	11,934	7,481	6,695	-11%
Lane	5,414	4,029	8,857	10,003	7,704	6,396	-17%
Rogue Valley	4,134	3,749	8,752	8,934	5,214	3,763	-28%
Northwest Oregon	3,357	2,255	7,311	6,624	4,684	3,346	-29%
Southwestern Oregon	1,745	2,195	4,801	4,298	3,301	2,476	-25%
Eastern Oregon	2,147	2,527	4,199	4,399	3,035	2,583	-15%
Multi-area or unknown	667	906	1,413	1,014	1,497	1,244	-17%

Source: Oregon Employment Department

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



Oregon Private Job Vacancies by Geography, Spring 2025

Geography	Vacancies
Oregon Statewide	51,048
Portland Metro	19,219
Mid-Valley	5,728
Clackamas	4,862
East Cascades	4,667
Lane	3,592
Northwest Oregon	3,484
Rogue Valley	3,265
Southwestern Oregon	2,868
Eastern Oregon	2,408

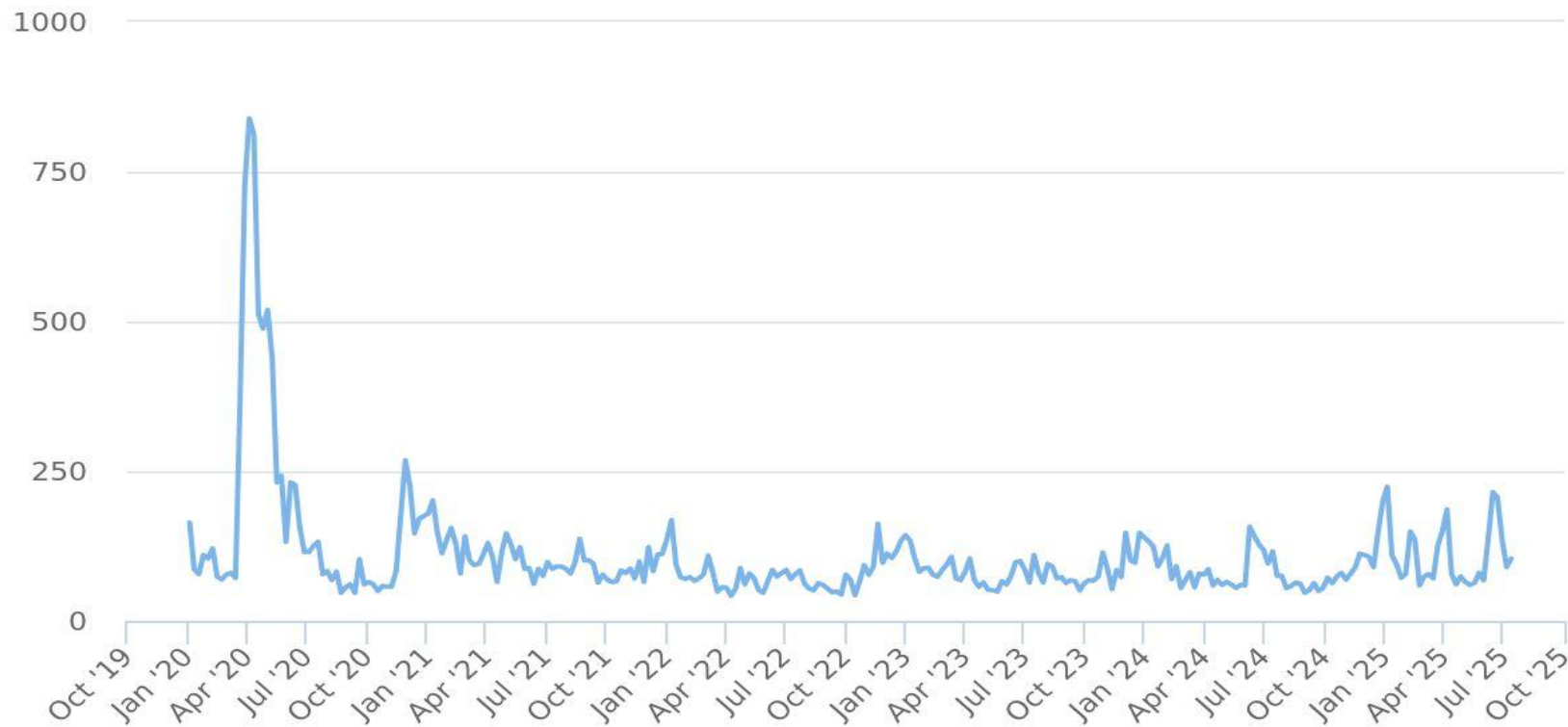
Multi-area or unknown regions excluded

Source: Oregon Employment Department

New initial claims for unemployment insurance rising a bit in Josephine County.

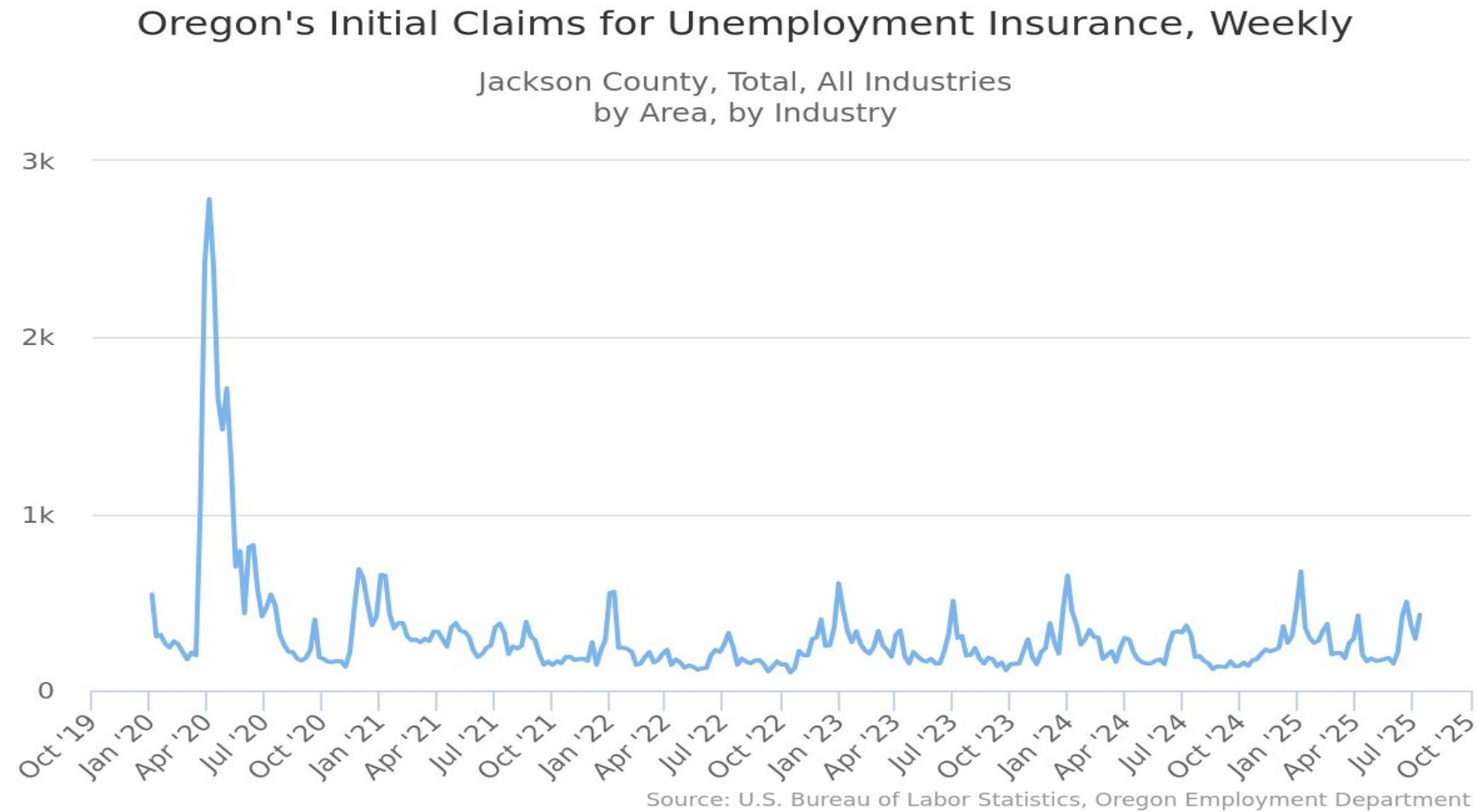
Oregon's Initial Claims for Unemployment Insurance, Weekly

Josephine County, Total, All Industries
by Area, by Industry



Source: U.S. Bureau of Labor Statistics, Oregon Employment Department

New initial claims for unemployment insurance have returned to remain low in Jackson County



MOST JACKSON COUNTY INDUSTRIES LITTLE CHANGED OR LOSING JOBS

	June 2025	May 2025	June 2024	--Change From--	
				May 2025	June 2024
Nonfarm Payroll Employment					
Total nonfarm employment	90,380	90,690	90,020	-310	360
Total private	78,360	78,590	77,890	-230	470
Mining, logging, and construction	5,840	5,800	5,980	40	-140
Mining and logging	460	450	490	10	-30
Construction	5,380	5,350	5,490	30	-110
Manufacturing	6,700	6,680	6,840	20	-140
Trade, transportation, and utilities	19,020	18,920	18,930	100	90
Wholesale trade	2,520	2,490	2,590	30	-70
Retail trade	13,100	13,010	12,940	90	160
Transportation, warehousing, and utilities	3,400	3,420	3,400	-20	0
Information	890	880	920	10	-30
Financial activities	3,640	3,660	3,660	-20	-20
Professional and business services	8,300	8,390	8,200	-90	100
Private education and health services	19,980	20,440	19,570	-460	410
Health care and social assistance	19,530	19,700	18,510	-170	1,020
Leisure and hospitality	11,310	11,090	11,110	220	200
Accommodation and food services	9,520	9,390	9,390	130	130
Other services	2,680	2,730	2,680	-50	0
Government	12,020	12,100	12,130	-80	-110
Federal government	1,940	1,930	1,980	10	-40
State government	1,360	1,340	1,250	20	110
State education	0	0	0	0	0
Local government	8,720	8,830	8,900	-110	-180
Local education	5,440	5,540	5,620	-100	-180

MOST JOSEPHINE COUNTY PRIVATE SECTOR INDUSTRIES DOWN OVER THE YEAR

	--Change From--				
	June 2025	May 2025	June 2024	May 2025	June 2024
Nonfarm Payroll Employment					
Total nonfarm employment	26,860	26,960	27,640	-100	-780
Total private	23,250	23,330	23,980	-80	-730
Mining, logging, and construction	1,220	1,210	1,280	10	-60
Mining and logging	100	100	90	0	10
Construction	1,120	1,110	1,190	10	-70
Manufacturing	2,810	2,800	2,810	10	0
Wood product manufacturing	540	550	480	-10	60
Trade, transportation, and utilities	5,090	5,090	5,290	0	-200
Wholesale trade	570	560	600	10	-30
Retail trade	4,000	4,010	4,130	-10	-130
Transportation, warehousing, and utilities	520	520	560	0	-40
Information	260	250	250	10	10
Financial activities	1,510	1,510	1,640	0	-130
Professional and business services	1,810	1,830	1,810	-20	0
Private education and health services	6,120	6,260	6,280	-140	-160
Leisure and hospitality	3,450	3,380	3,630	70	-180
Other services	980	1,000	990	-20	-10
Government	3,610	3,630	3,660	-20	-50
Federal government	300	300	330	0	-30
State government	530	520	460	10	70
Local government	2,780	2,810	2,870	-30	-90
Local education	1,920	1,970	1,960	-50	-40
Local government excluding educational services	860	840	910	20	-50

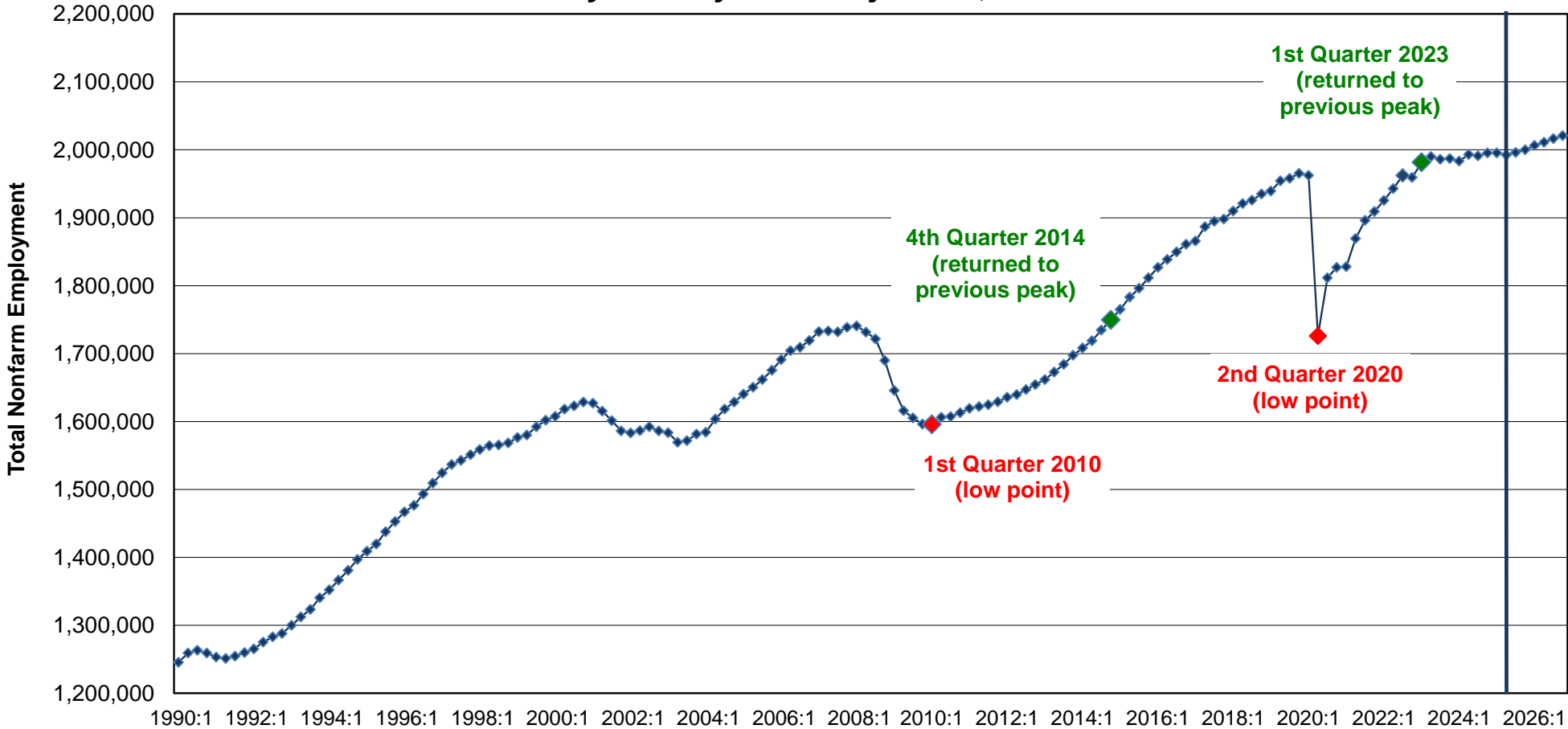
EMPLOYMENT AND WAGES (WESTERN U.S.)

- 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. Nonetheless, 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 continued to grow at a slight pace. Firms generally described demand and supply for labor being in better balance, increasing employers' bargaining power.

ECONOMIC ACTIVITY (OREGON AND REGION)

- Economic activity in the Twelfth District (Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah, and Washington) was **somewhat subdued but largely stable during the mid-May to June reporting period.**
- **Employment levels were slightly lower on net with more firms under a hiring freeze and using attrition and layoffs to reduce headcount.**
- Wages continued to grow at a slight pace, and prices rose modestly.
- Retail sales expanded modestly, and activity in consumer and business services eased.
- **Activity in manufacturing and the 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.**

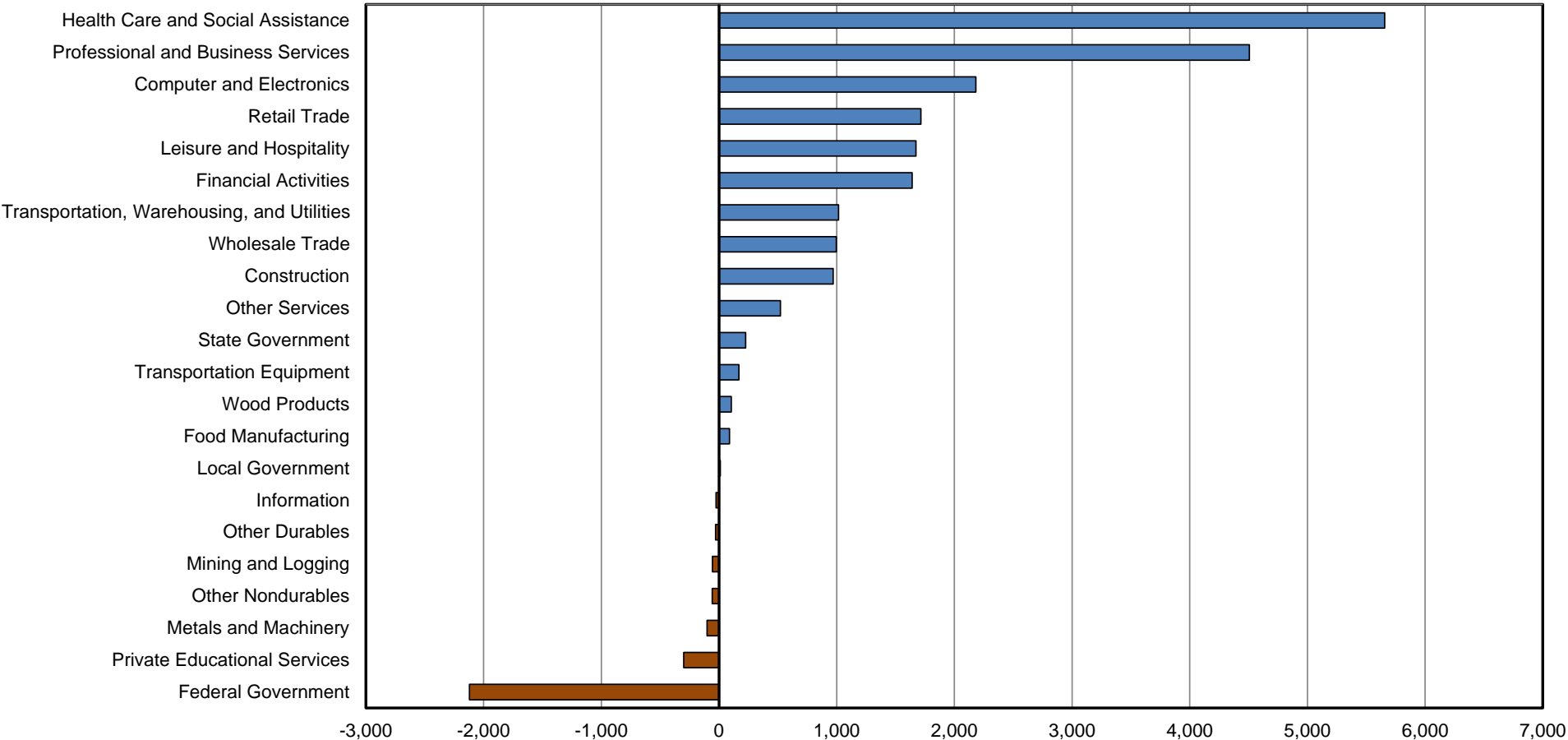
Oregon Nonfarm Payroll Employment
Quarterly History and Projection, 1990-2026



Source: Office of Economic Analysis, Department of Administrative Services, May 2025

OEA EXPECTS OREGON TO GAIN ABOUT 18,800 JOBS IN THE NEXT 12 MONTHS.

Expected Job Changes by Industry Sector Over The Year
(2Q2025 - 2Q2026)



Source: Oregon Employment Department analysis using Oregon Office of Economic Analysis Forecast, May 2025

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

June 2025



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