

ROGUE VALLEY ECONOMIC AND WORKFORCE UPDATE

ROGUE VALLEY WORKFORCE INVESTMENT BOARD MEETING

11-7-25

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

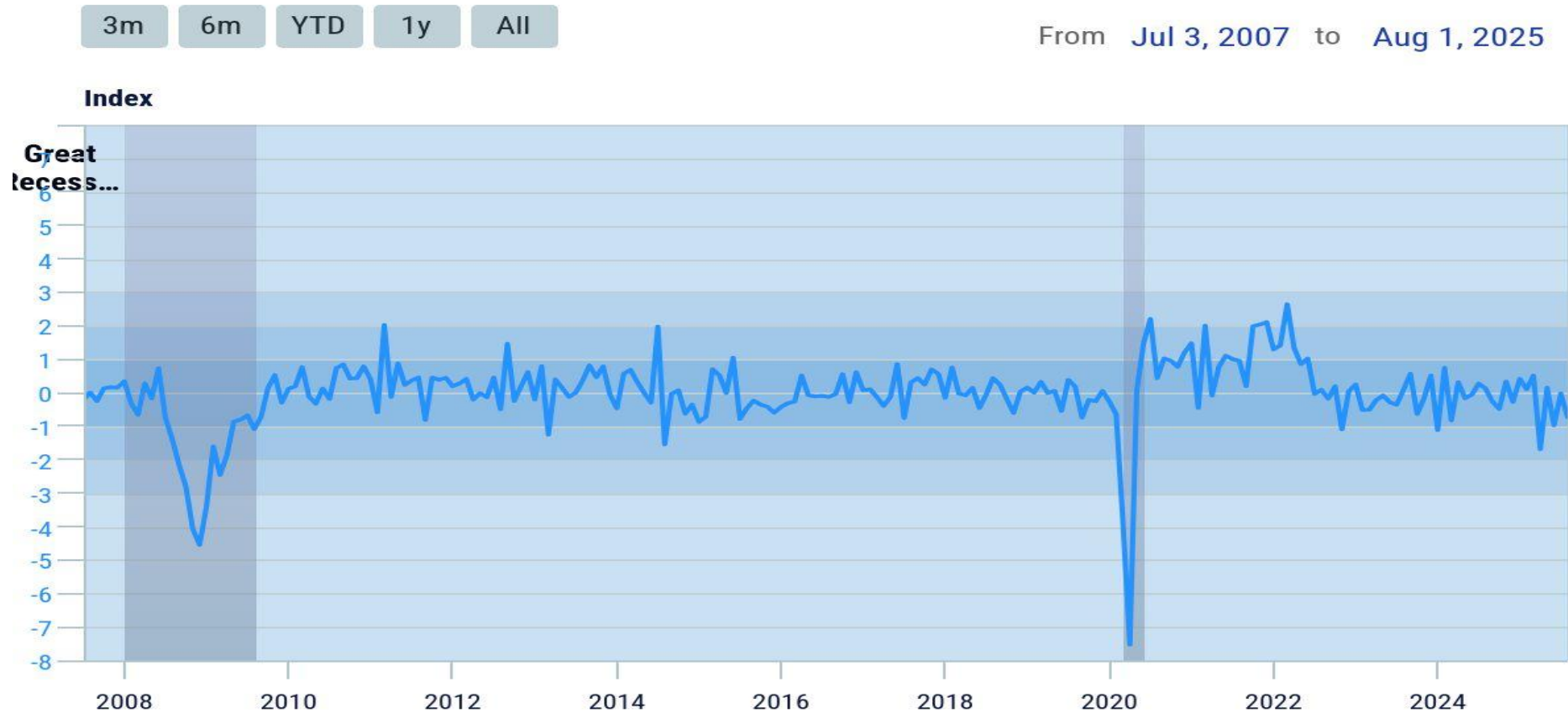
** Collected and produced by Oregon Employment Department*

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.

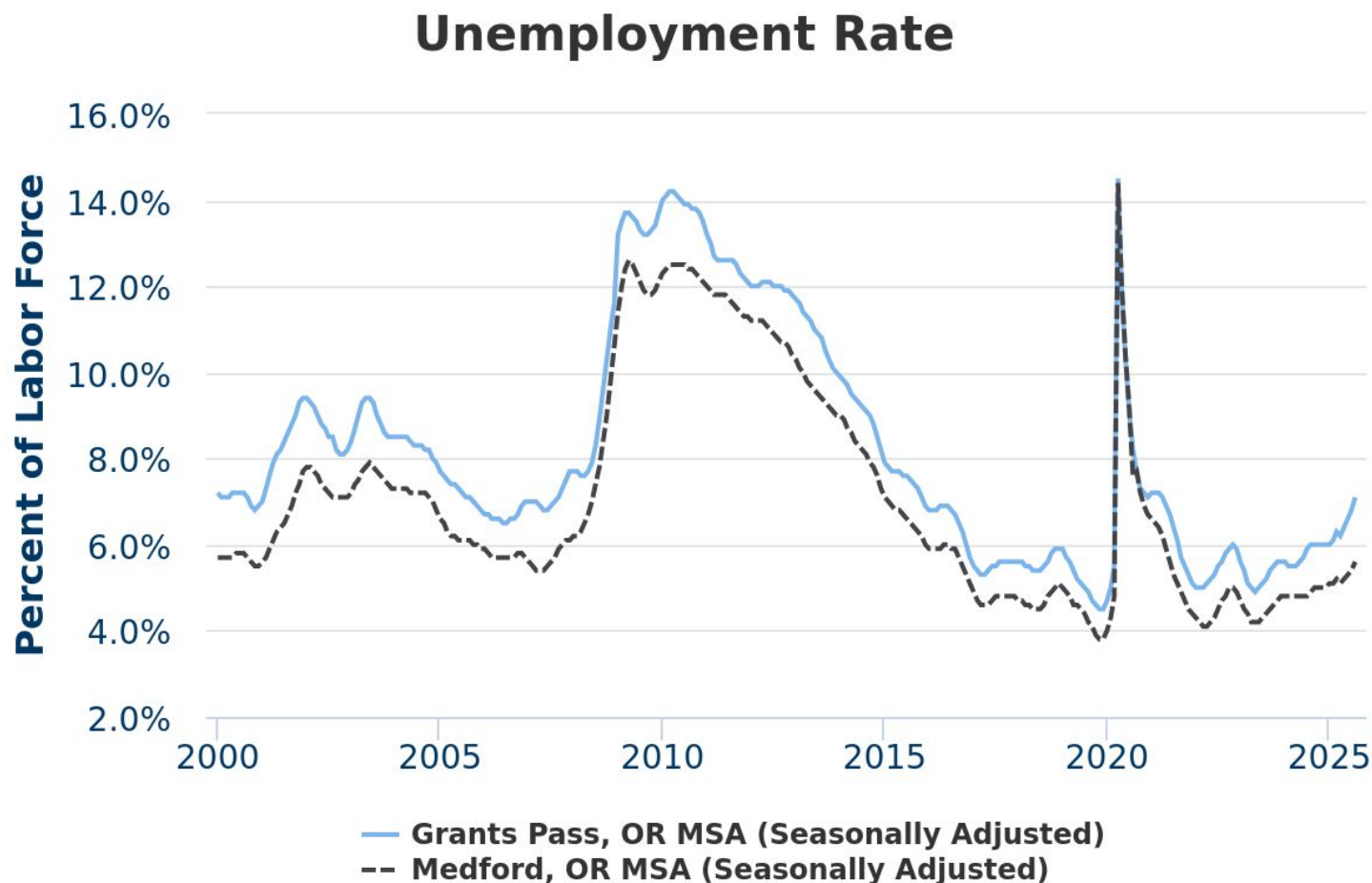
Thank you for helping us track the Oregon economy!

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.- August -0.74

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



Jackson = 5.4%

Josephine = 7.1%

U.S.=4.3%

August 2025

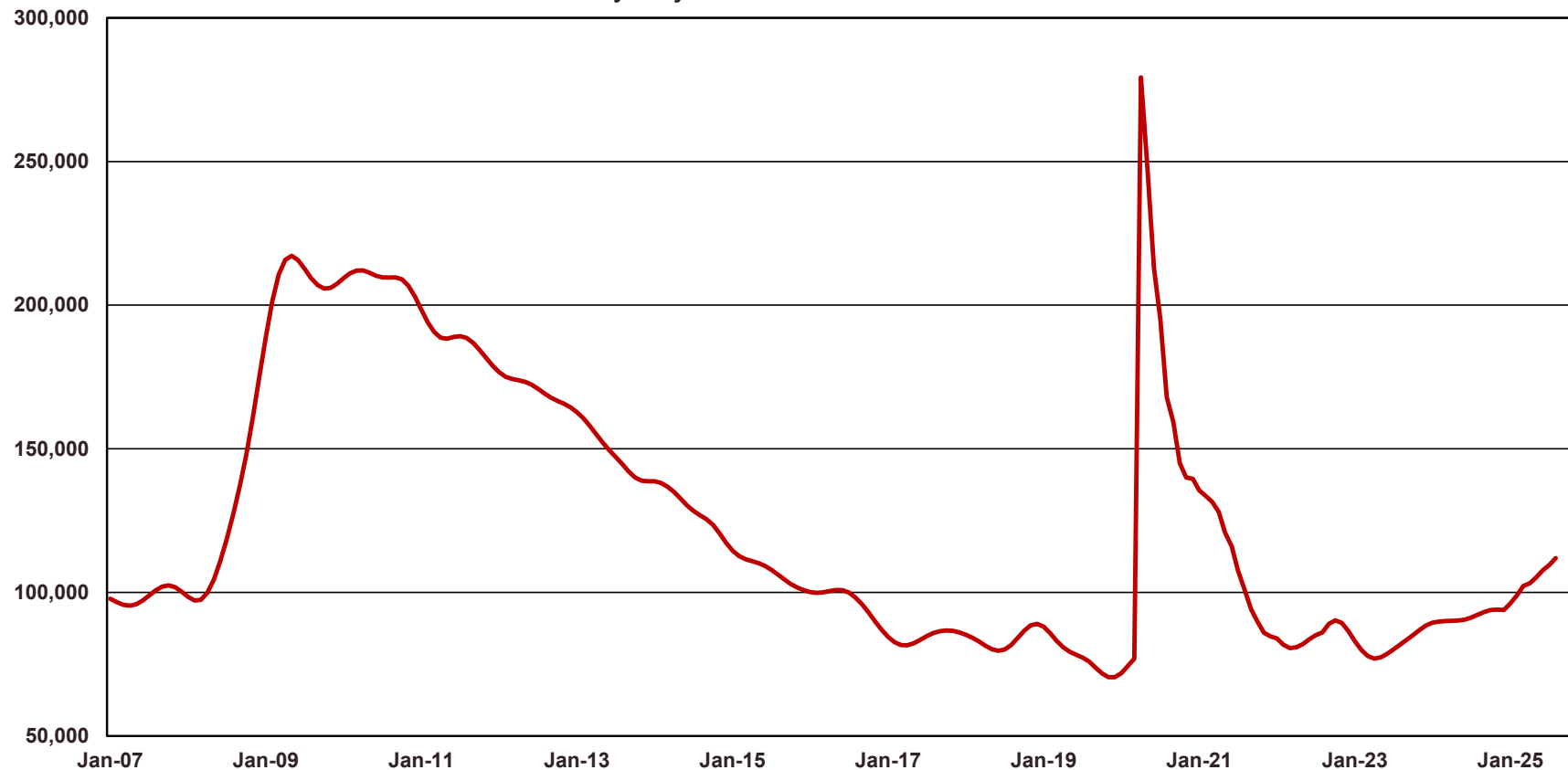
Source: Oregon Employment Department [Qualityinfo.org](https://qualityinfo.org)

KEY FACTS FROM RECENT NEWS RELEASE

The U.S. Bureau of Labor Statistics suspended production of monthly employment and unemployment reports for the nation, states, and metropolitan areas as of Oct. 1, 2025. Other labor market information continues to be available on QualityInfo.org

THE NUMBER OF UNEMPLOYED OREGONIANS INCREASED BY 2,400 IN AUGUST.

Unemployed Persons, Oregon Statewide
Seasonally Adjusted, 2007 to Present



Source: Oregon Employment Department, Local Area Unemployment Statistics

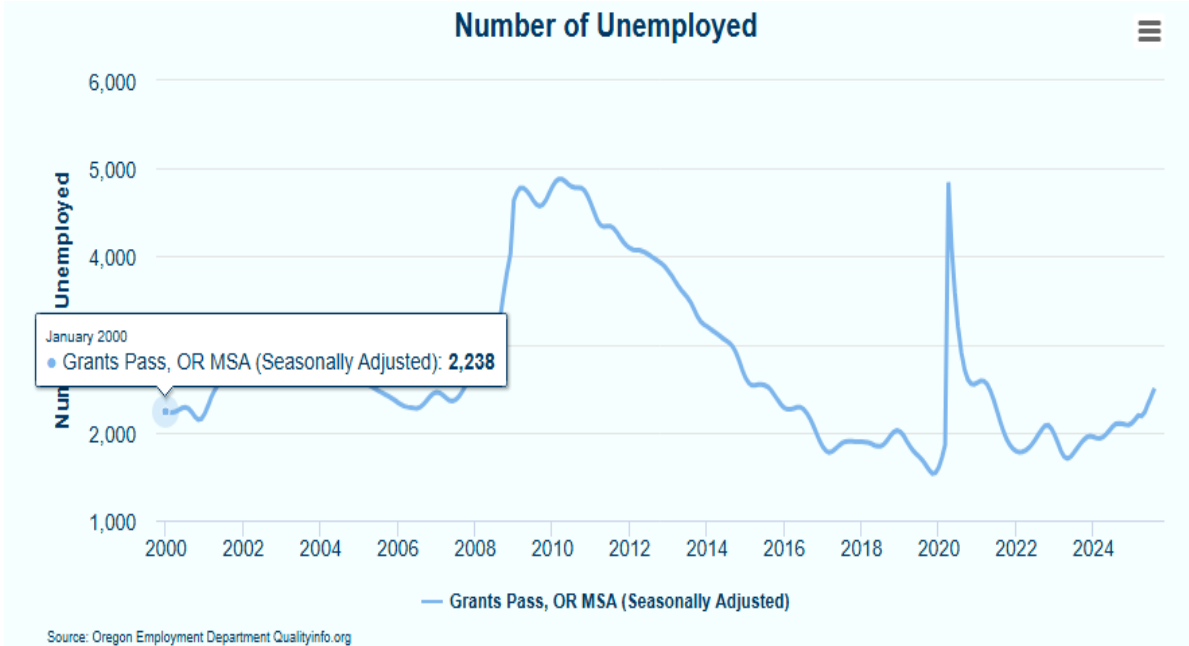
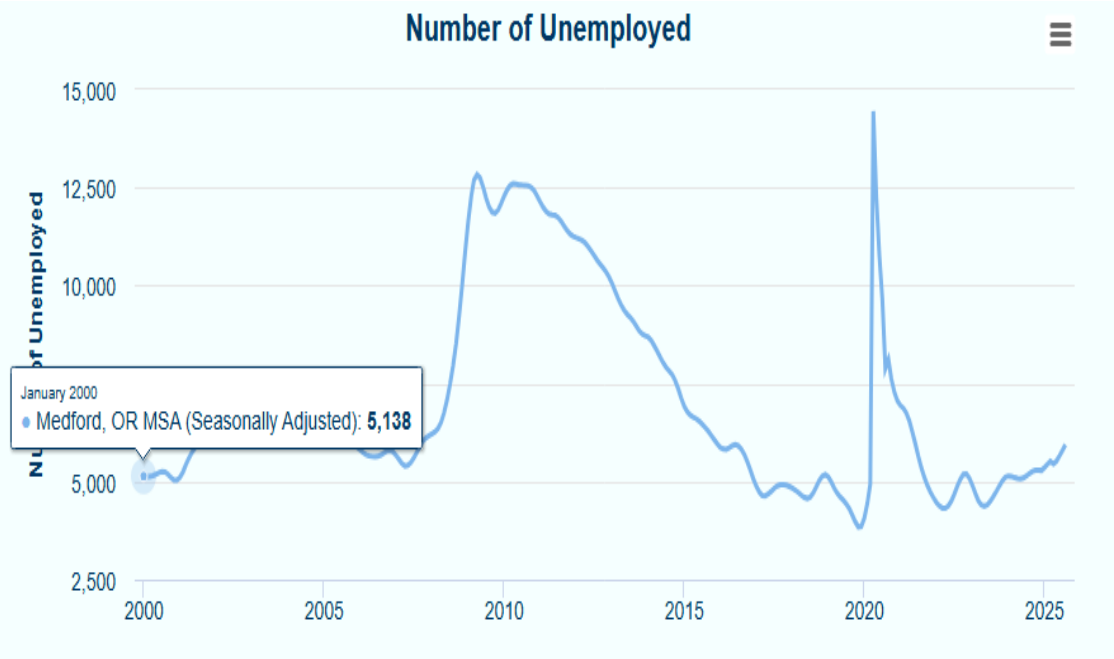
**Seasonally Adjusted
Unemployment:**

Pre-COVID Low
Nov 2019: 70,500

Highest
April 2020: 279,300

Current
August 2025: 111,900

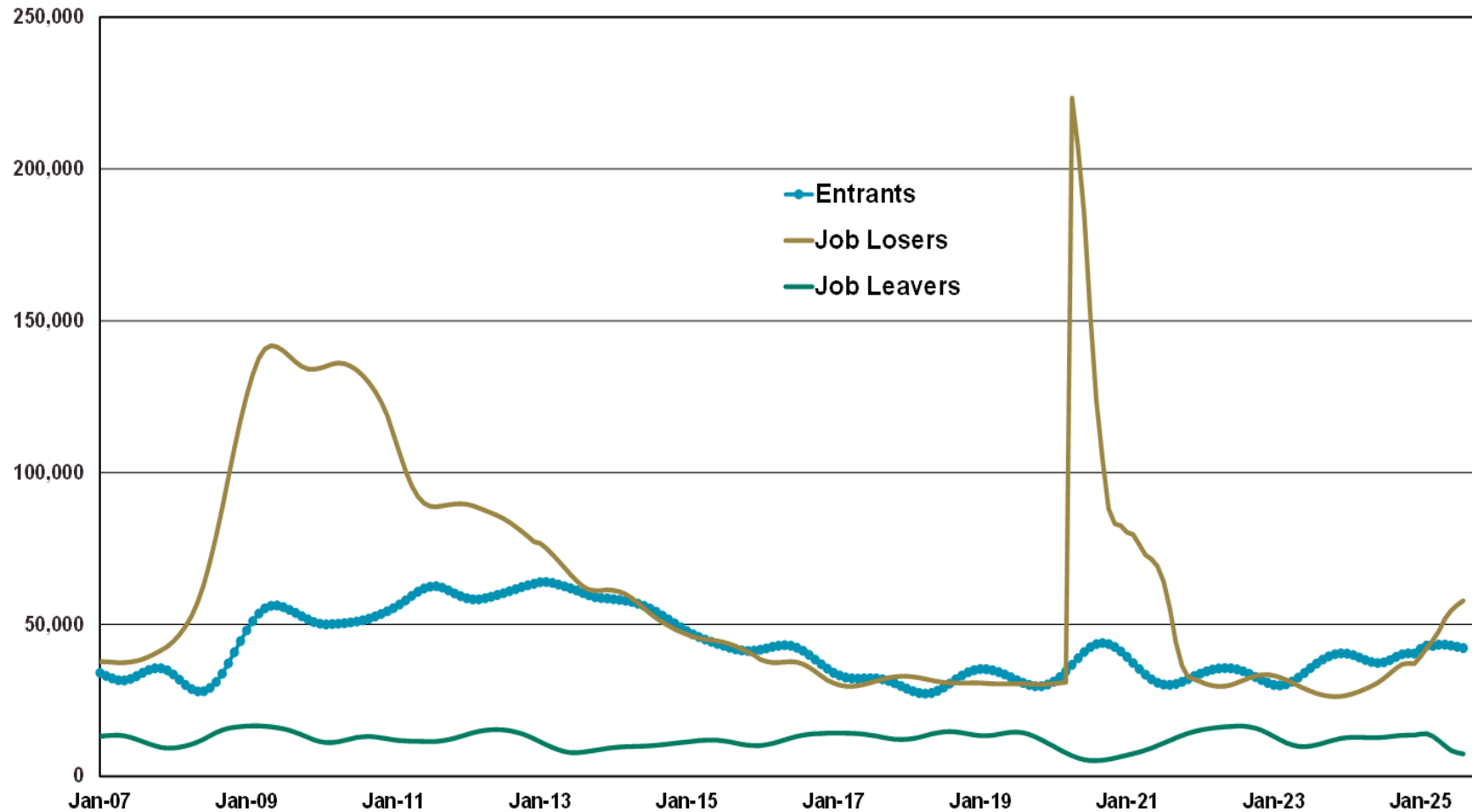
ROGUE VALLEY SEEING RISING NUMBER OF UNEMPLOYED



Jackson County 5,941 Unemployed in August 2025- up from 5,207 one year earlier
Josephine County 2,503 unemployed in August- up from 2,007 in August 2024

WHY ARE OREGONIANS UNEMPLOYED?

Oregon Unemployment by Reason [Trend]



Source: Oregon Employment Department, Current Population Survey

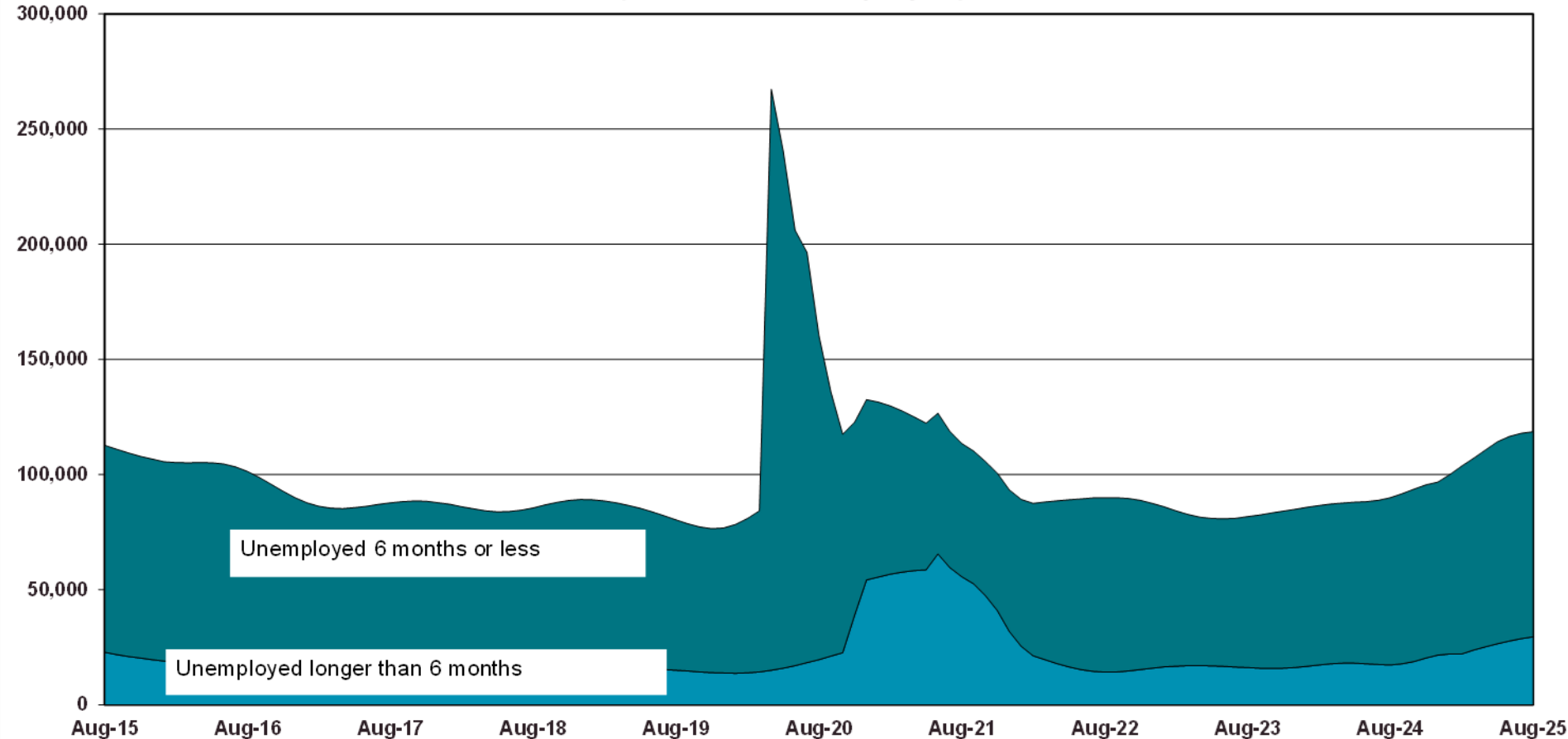
New or returning to the workforce
42,300 (39%)

Lost job
57,500 (54%)

Left job voluntarily
7,300 (7%)

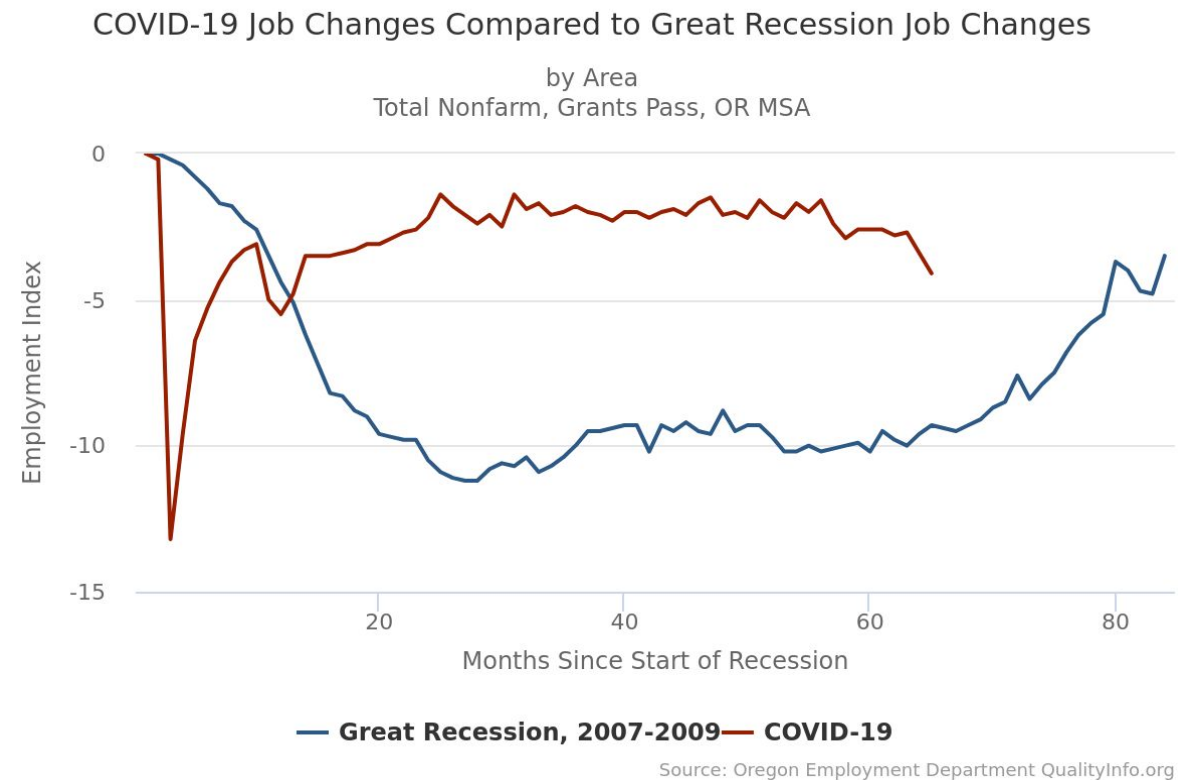
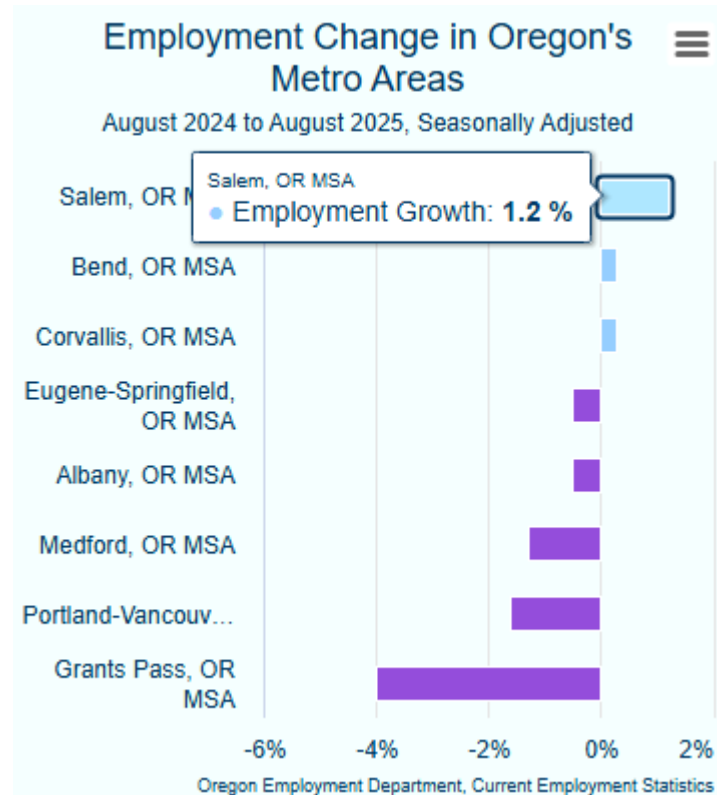
ONE OUT OF FOUR UNEMPLOYED OREGONIANS HAVE BEEN OUT OF WORK FOR AT LEAST SIX MONTHS.

There are 32,500 Long-Term Unemployed Oregonians
(27% of All Unemployed)



Source: Oregon Employment Department, Local Area Unemployment Statistics

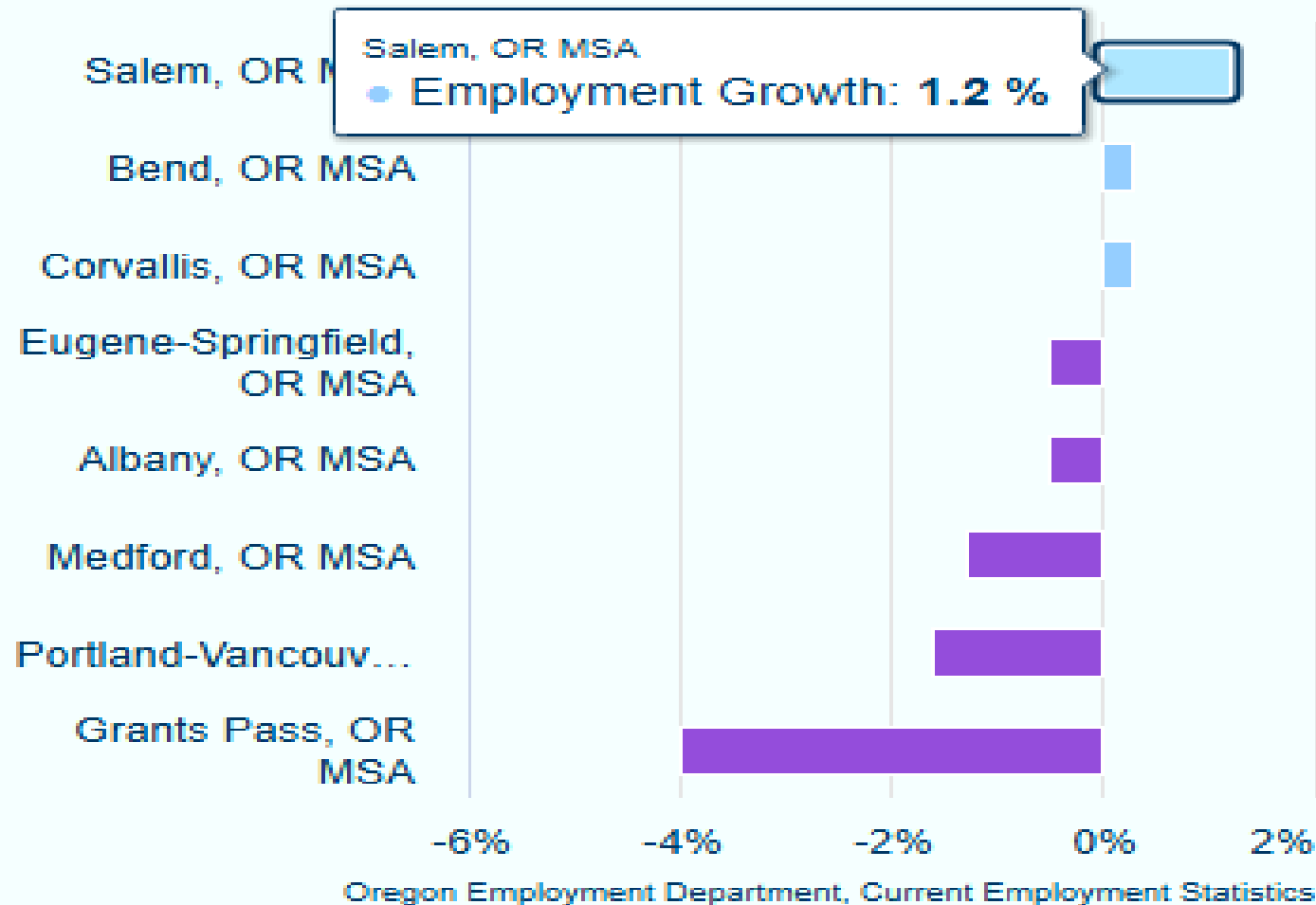
Most jobs back that were lost during the pandemic in the Rogue Valley- still a bit below February 2020 – seasonally adjusted



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

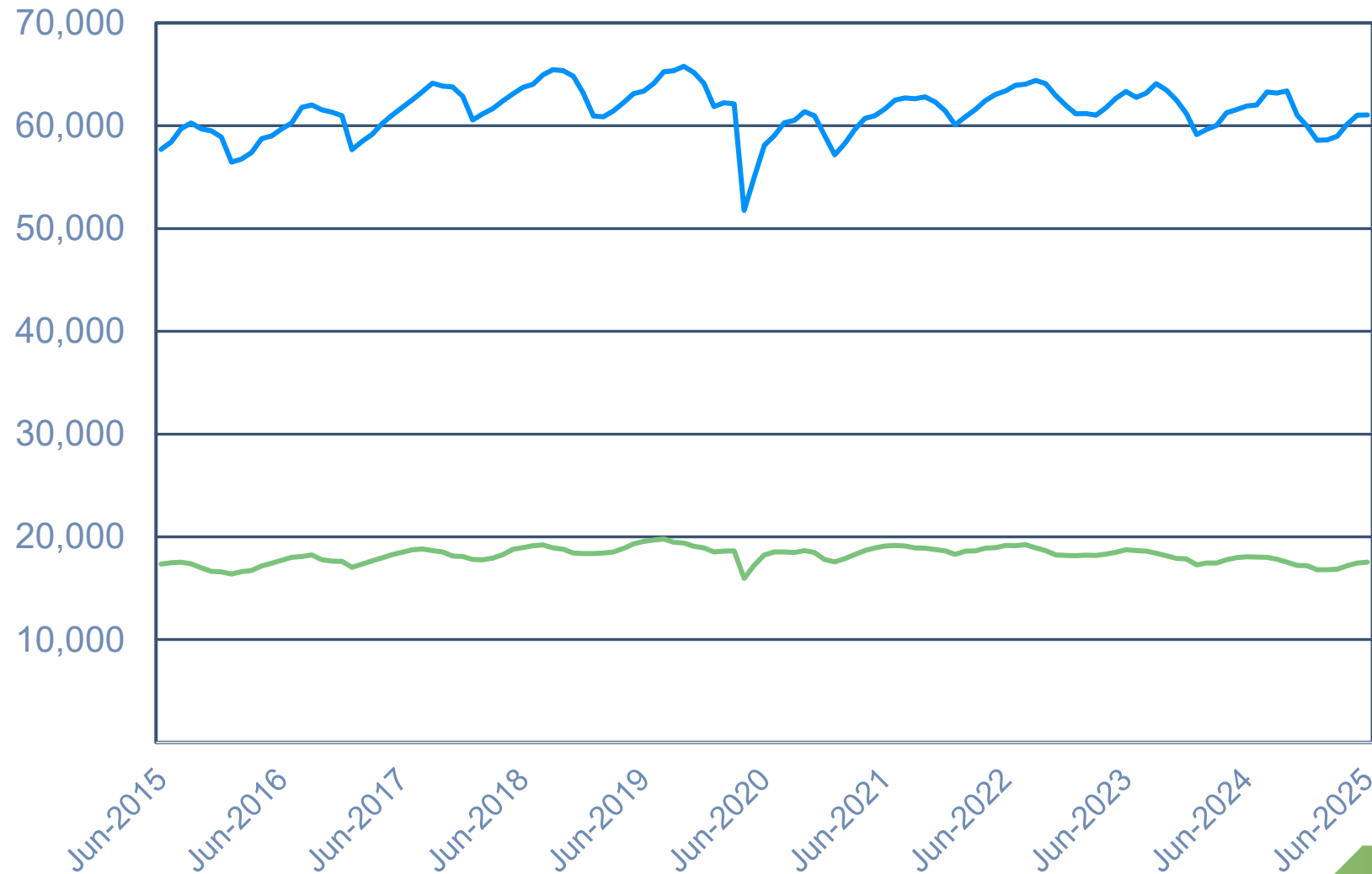
Employment Change in Oregon's Metro Areas

August 2024 to August 2025, Seasonally Adjusted

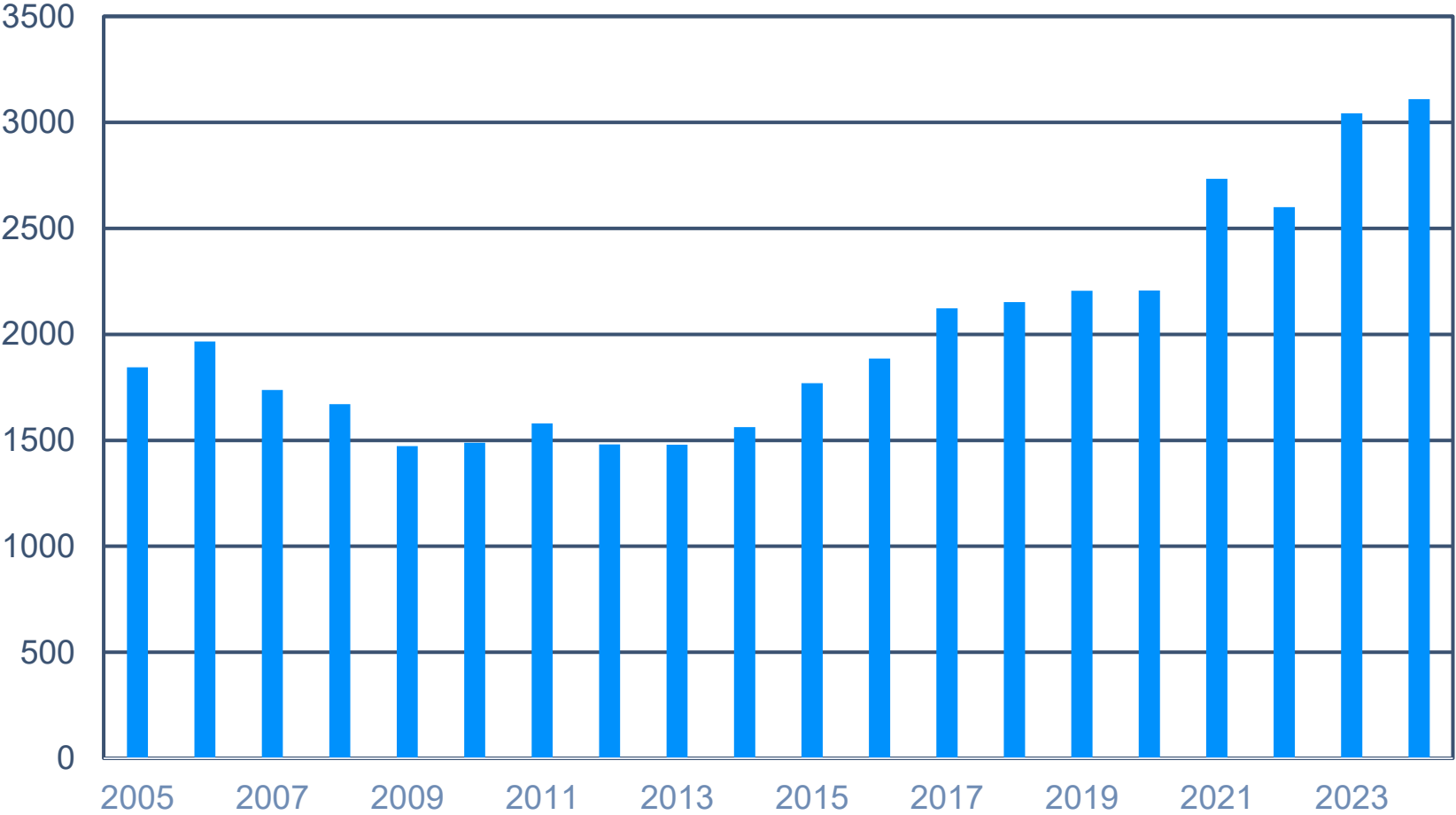


Core Jobs = Private sector payroll employment minus health care

Rogue Valley Core Jobs June 2015 to June 2025



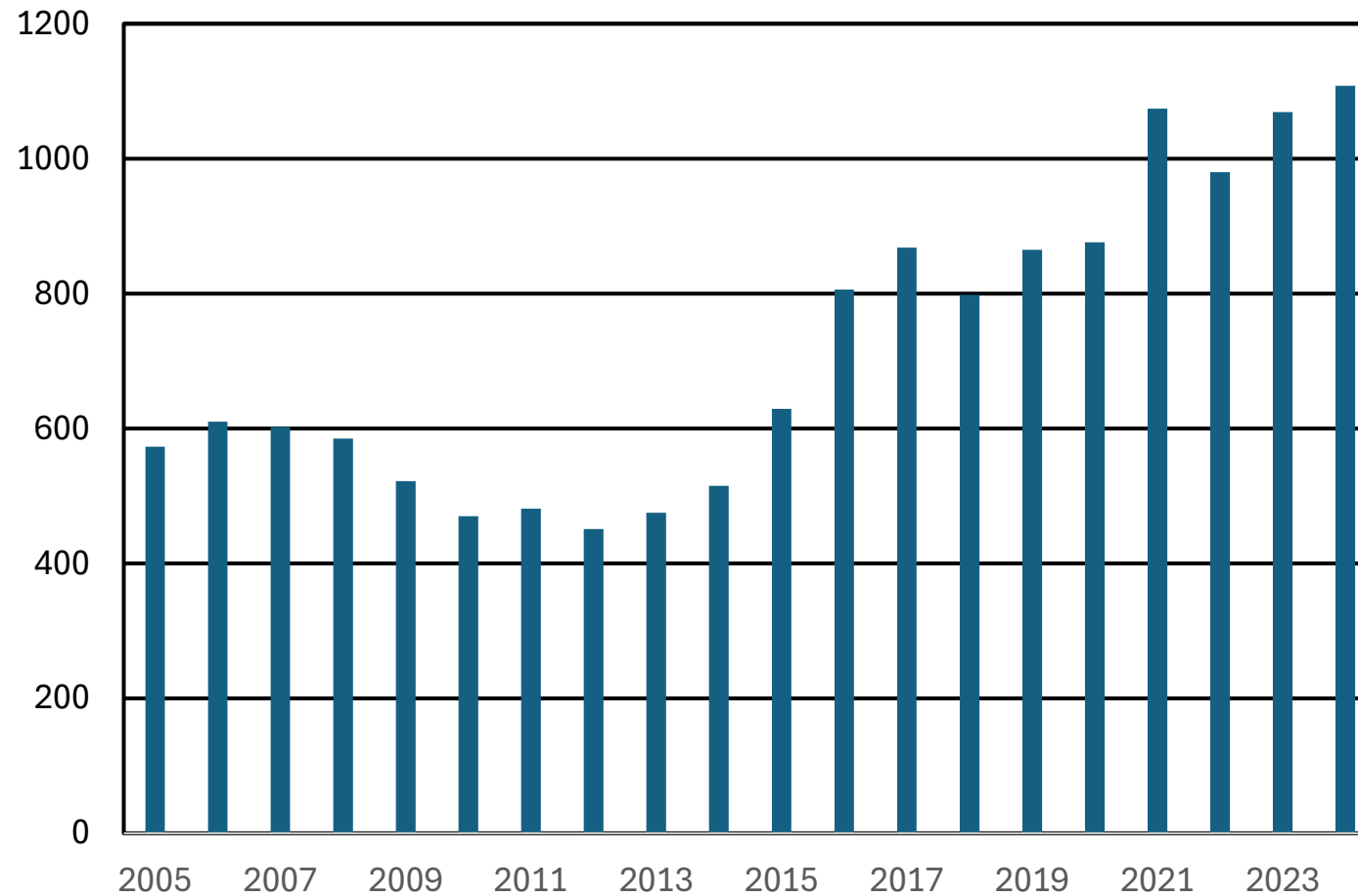
Jackson County Business Applications 2005-2024



Jackson
County
Business
Applications
up 2.2% from
2023-2024

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

Josephine County Business Applications 2005-2024



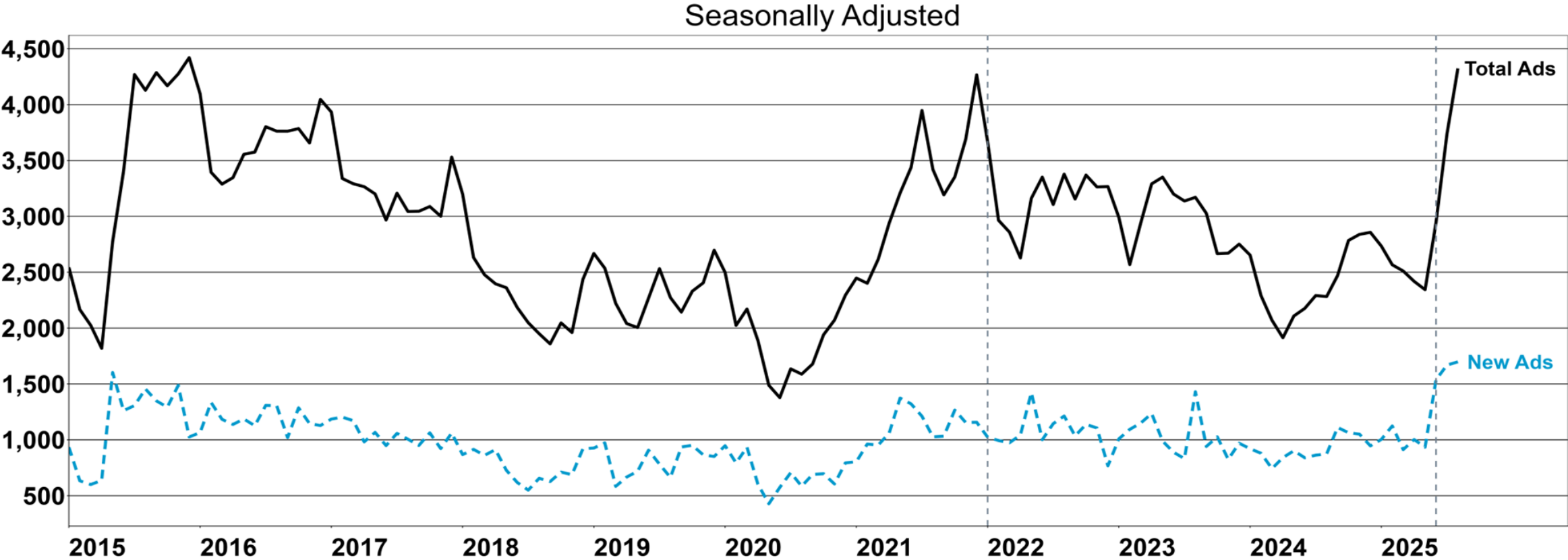
Source: Oregon Employment Department and U.S. Census Bureau Business

Josephine
County
Business
Applications
rose 3.6%
2023 to 2024

In January 2022, the Conference Board instituted system wide changes to their data collection process to better capture when job ads have expired. As part of these changes, there is an increase in the number of ads that expired, and subsequently, a level change in the data series for Available Ads. The HWOL Index and New Ads series remain unaffected by this update.

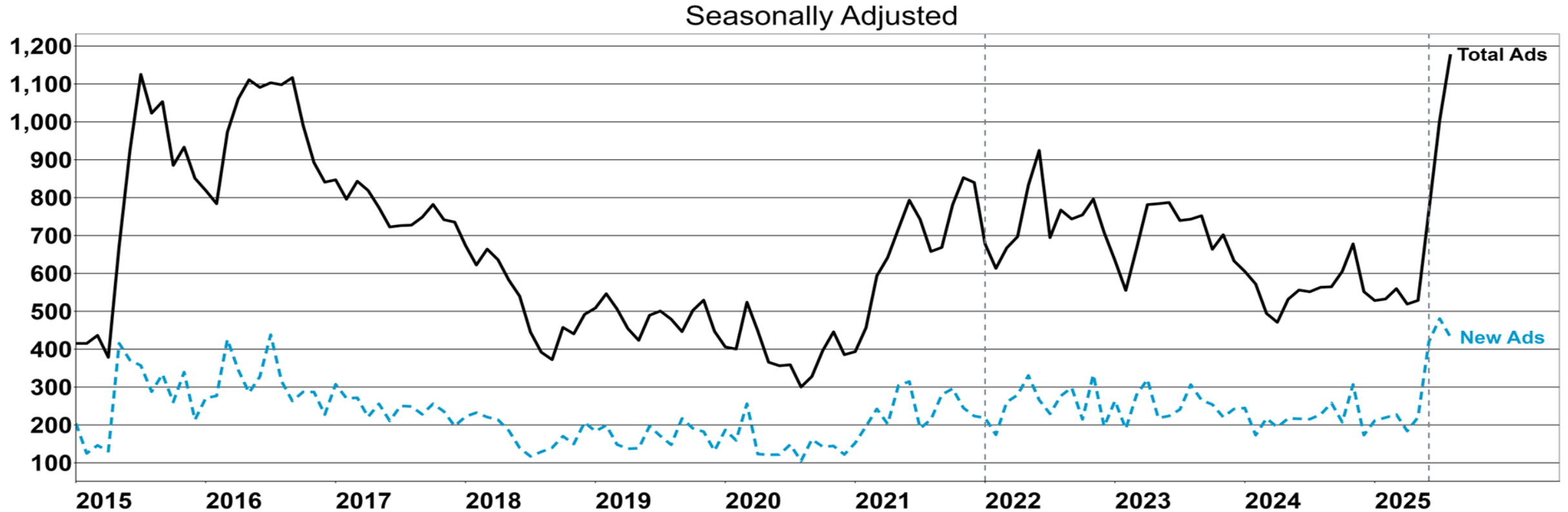
In June 2025, Lightcast and the Conference Board instituted system wide changes to their data collection process to improve coverage of job boards. This could result in level changes in HWOL job posting volume. The HWOL Index remains unaffected by this update.

The number of online ads in the Medford metro area was 4,300 in August.
The number of new ads increased by 30 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 1,200 in August.
The number of new ads **decreased** by **50** 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



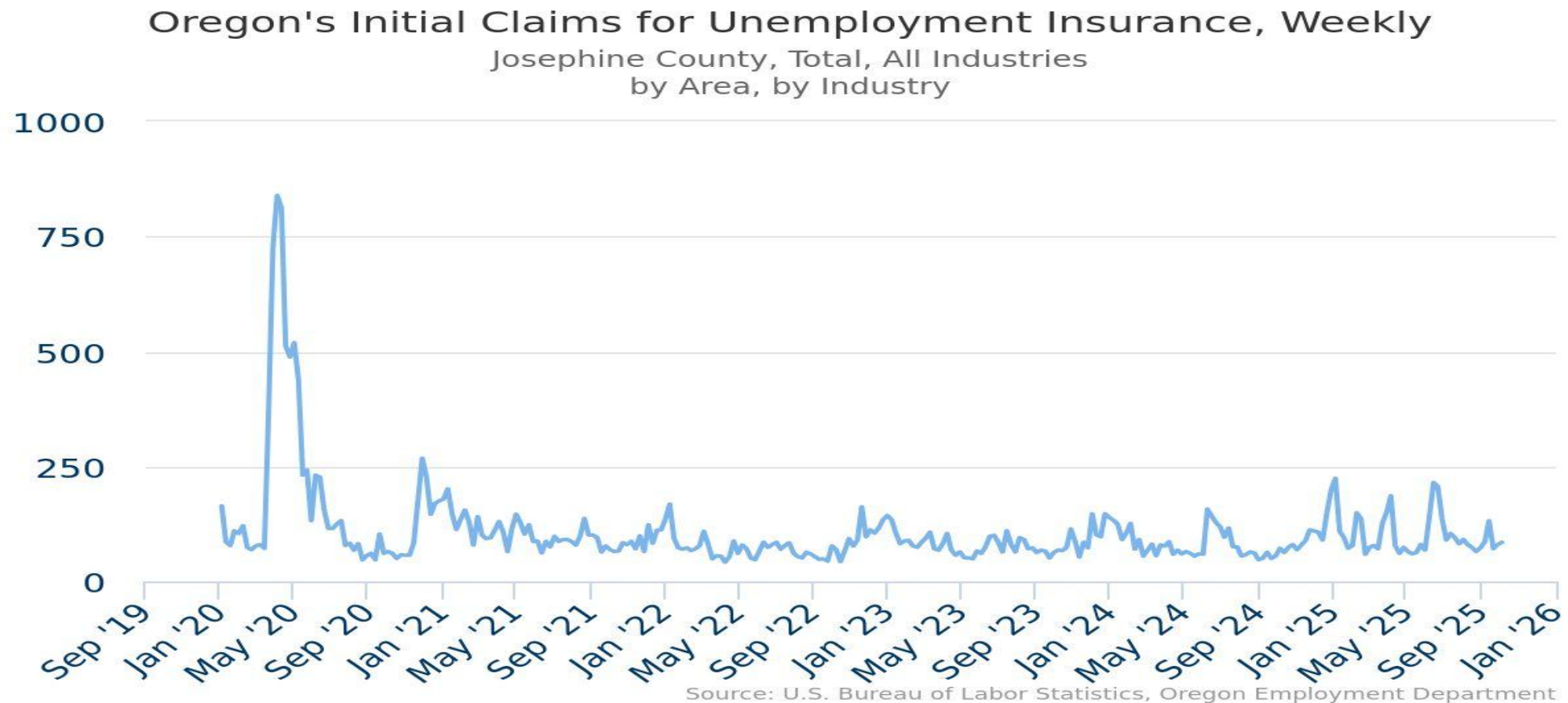
Oregon Private Job Vacancies by Geography, Spring 2025

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

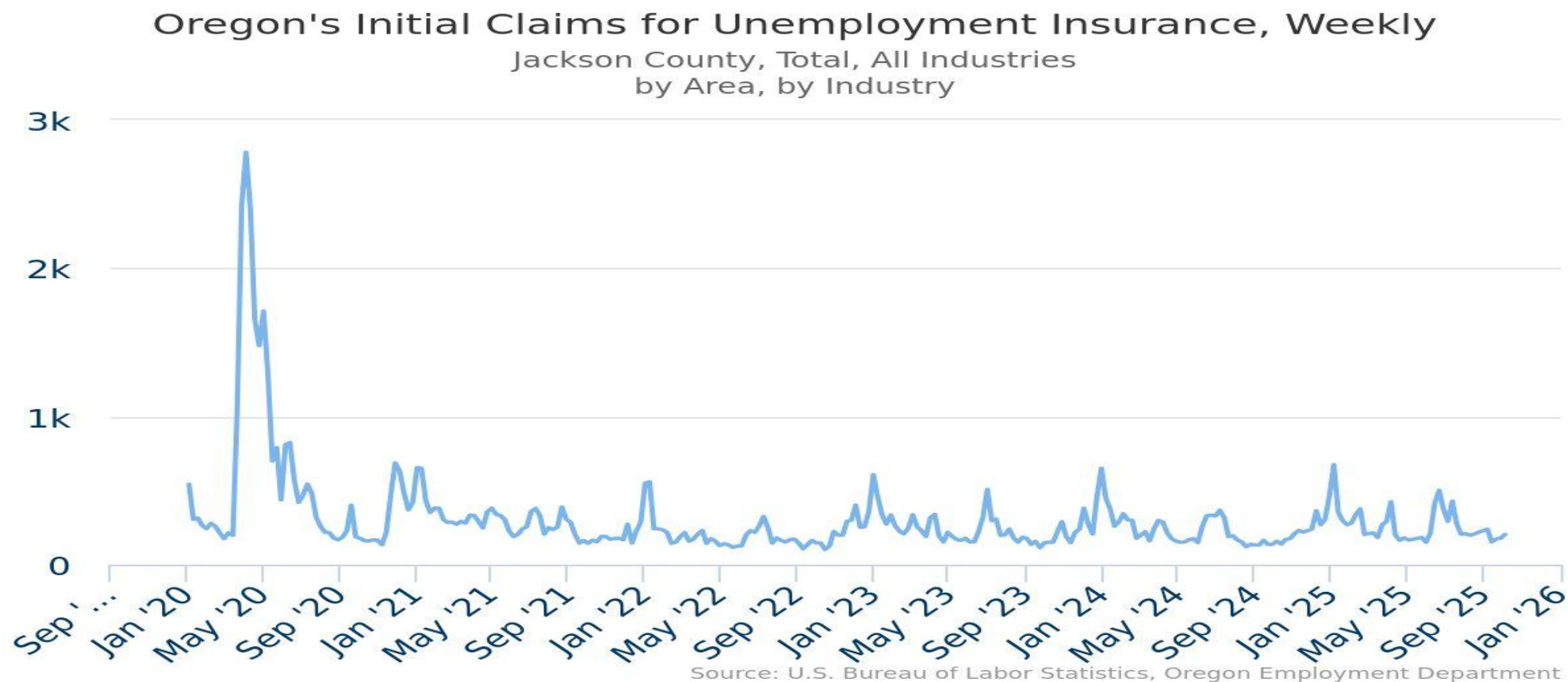
Multi-area or unknown regions excluded

Source: Oregon Employment Department

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



New initial claims for unemployment insurance are slightly above last year in Jackson County



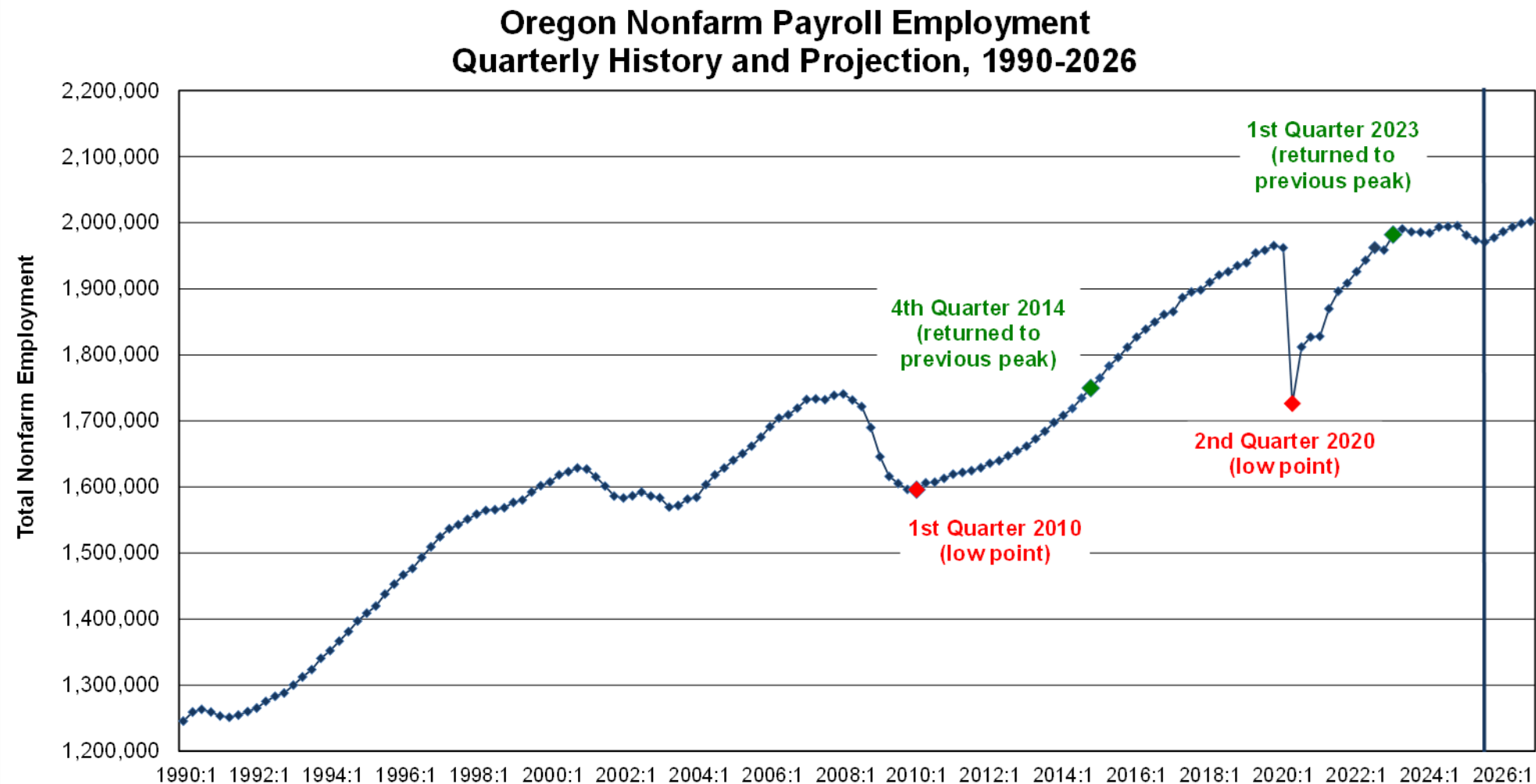
EMPLOYMENT AND WAGES (WESTERN U.S.)

- Employment levels fell slightly in recent weeks.
- Employers lowered head counts through layoffs, hiring freezes, and attrition.
- While some businesses turned to automation technologies to maintain output levels and reduce costs, others curtailed operating times, which reduced employee hours.
- However, several contacts in finance and food services expanded their workforce to staff new locations.
- Labor availability and applicant quality rose as regional pools of workers applying for jobs expanded.
- However, some contacts reported that businesses in agriculture and construction had difficulties filling positions due to constrained labor supplies from changes in immigration policy.
- Wages were up somewhat in recent weeks, as in the prior reporting period. Contacts reported that increases were in line with or below the rate of inflation.

ECONOMIC ACTIVITY (OREGON AND REGION)

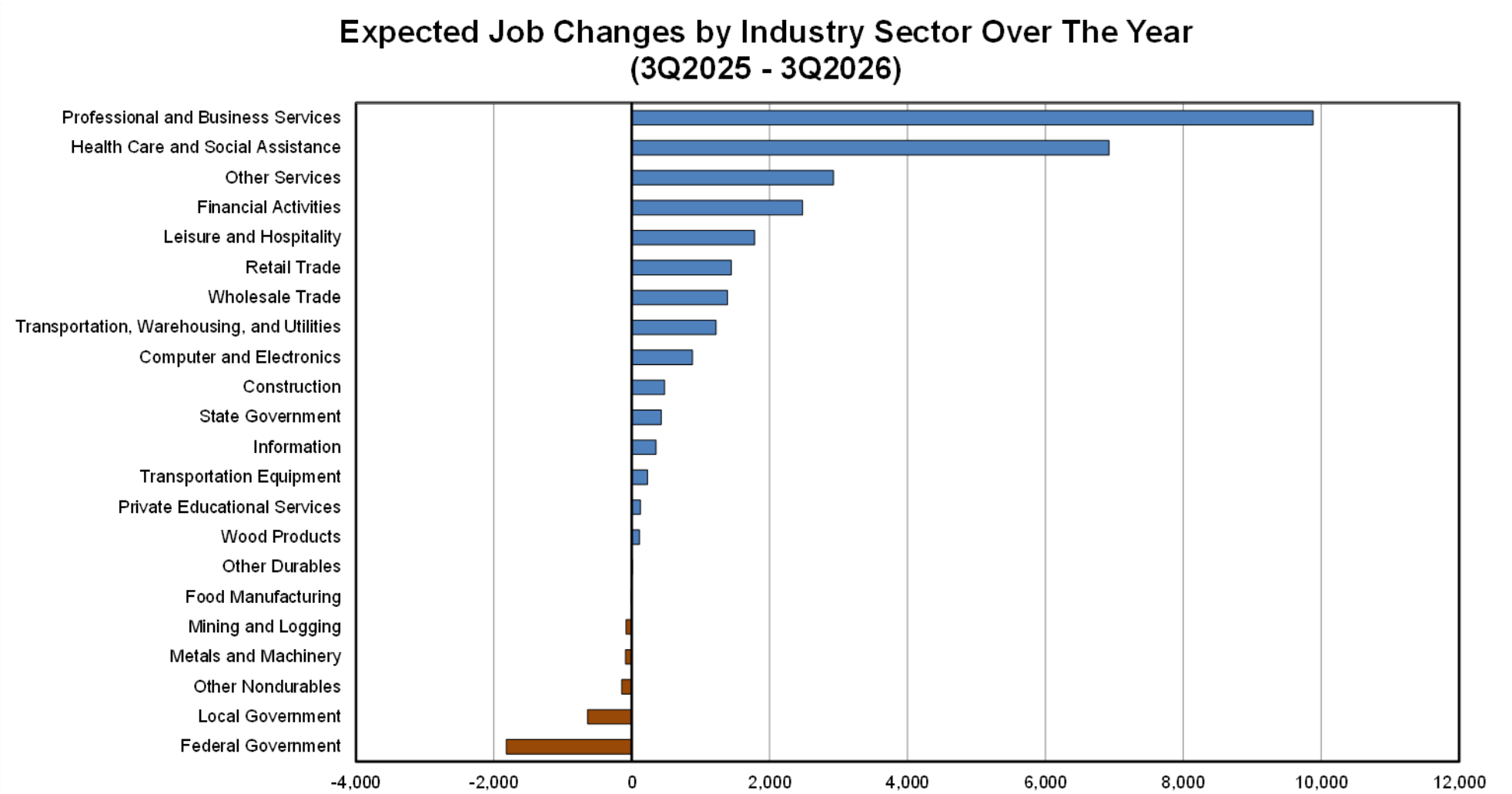
- Economic activity in the Twelfth District (Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah, and Washington) edged down slightly during the July to mid-August reporting period.
- Employment levels were down slightly as employers laid off workers and did not fill vacated positions.
- Wages grew somewhat, and prices rose modestly overall.
- Conditions in retail trade and the consumer and business services sector weakened slightly.
- Manufacturing activity declined modestly, and conditions in agriculture and resource-related sectors were somewhat weaker.
- Financial sector conditions were stable. In both residential and commercial real estate, activity was slow but unchanged.
- Community support organizations struggled to balance the continued demand for services against declines in funding.
- Looking ahead, contacts' economic outlook weakened some relative to the prior reporting period.

Federal Reserve Bank, Beige Book, September 3, 2025



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

OEA EXPECTS OREGON TO GAIN ABOUT 28,100 JOBS IN THE NEXT 12 MONTHS.



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

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

June 2025



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