

# ROGUE VALLEY ECONOMIC AND WORKFORCE UPDATE

ROGUE VALLEY WORKFORCE INVESTMENT BOARD MEETING

2-6-26

# 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.**

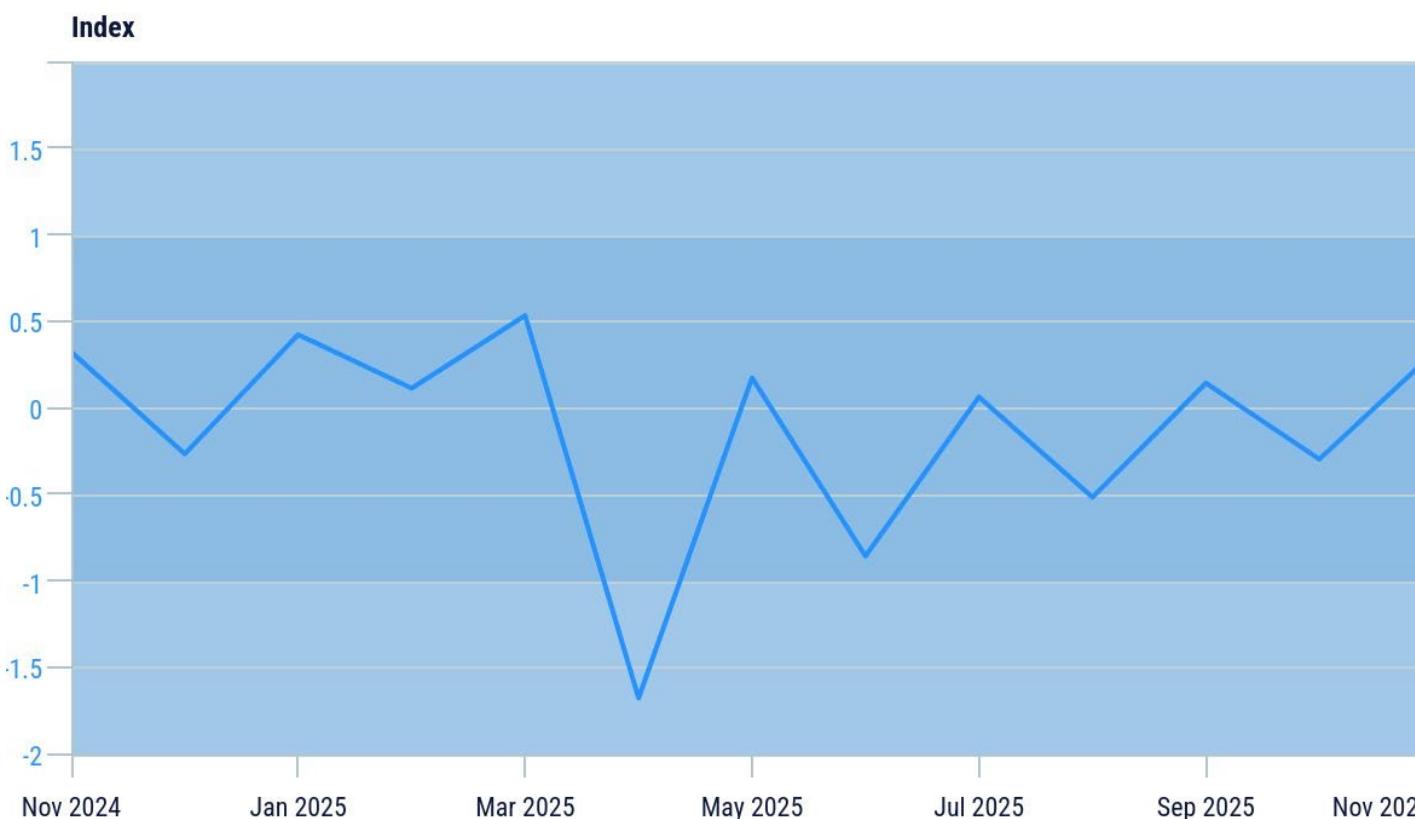
Your confidential responses are protected by federal and state law and strict security policies that prohibit us from releasing any information that could reveal the identity of you or your business without your consent.

**Thank you for helping us track the Oregon economy!**

# CENSUS BUREAU INDEX OF ECONOMIC ACTIVITY

3m 6m YTD **1y** All

From Nov 1, 2024 to Nov 1, 2025

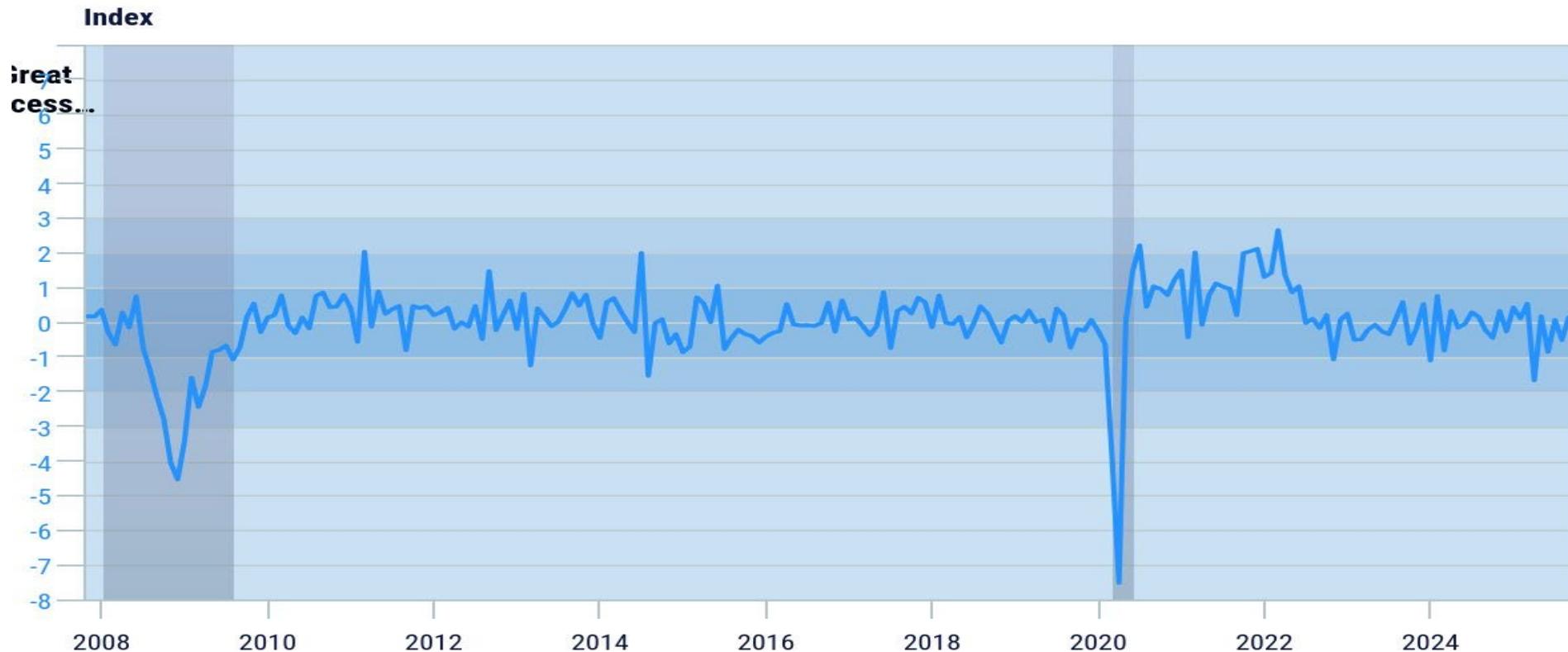


The U.S. Census Bureau Index of Economic Activity (IDEA) is an aggregation of 15 of the Census Bureau's primary economic data series that provides a single time series constructed as a weighted average. - November +0.31

# CENSUS BUREAU INDEX OF ECONOMIC ACTIVITY

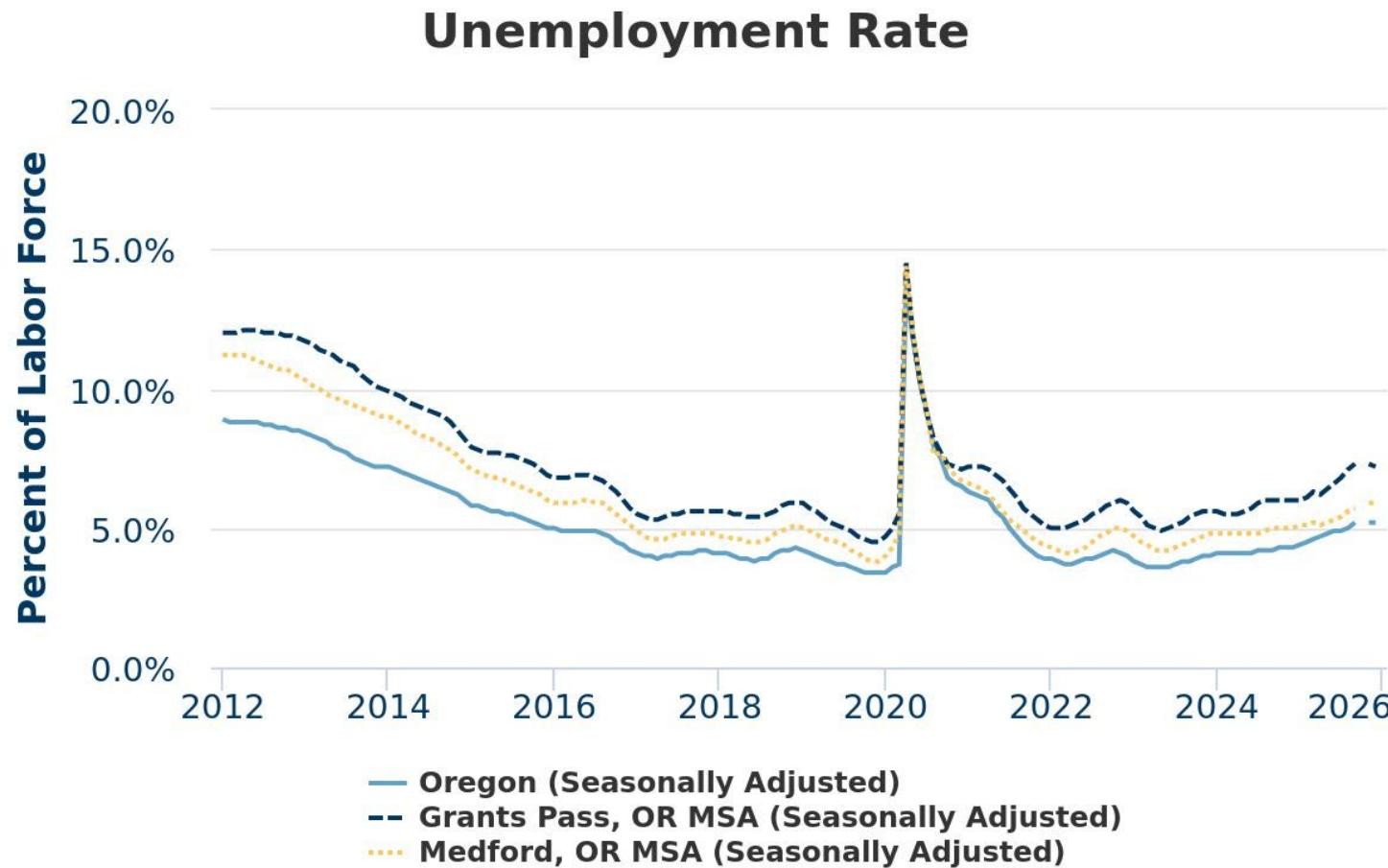
3m 6m YTD 1y All

From Oct 13, 2007 to Nov 1, 2025



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. - November + 0.31

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

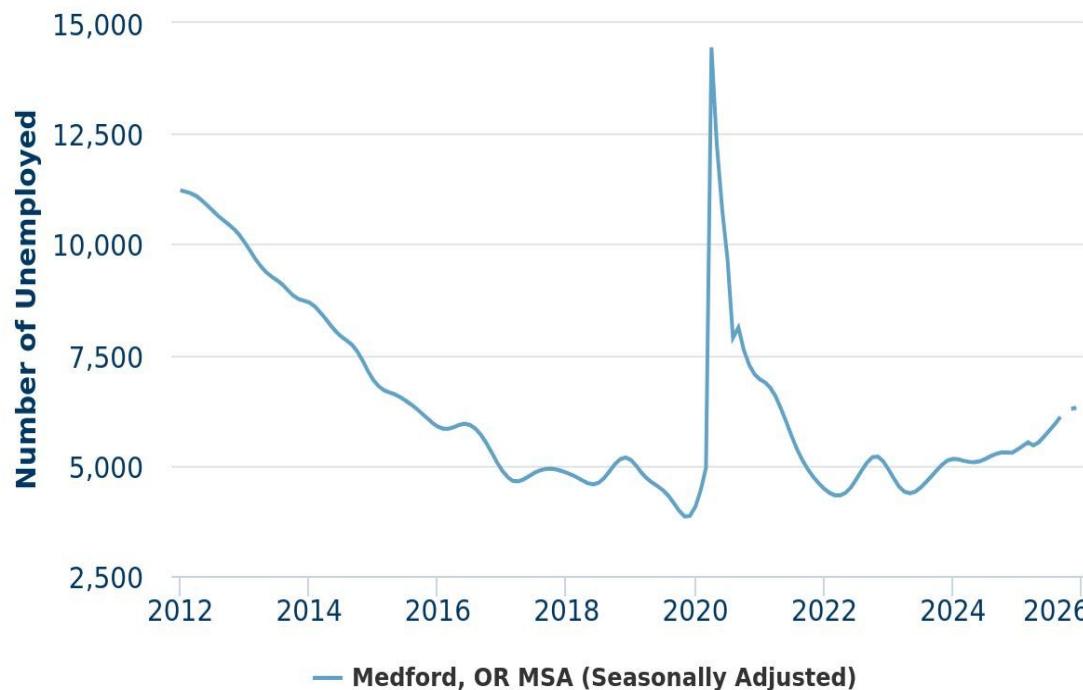


Source: Oregon Employment Department Qualityinfo.org

Jackson 5.0 to 5.9%  
Josephine 6.0 to 7.2%  
Oregon 4.3 to 5.2%  
December 2025

# ROGUE VALLEY SEEING RISING NUMBER OF UNEMPLOYED

## Number of Unemployed



Source: Oregon Employment Department Qualityinfo.org

## Number of Employed

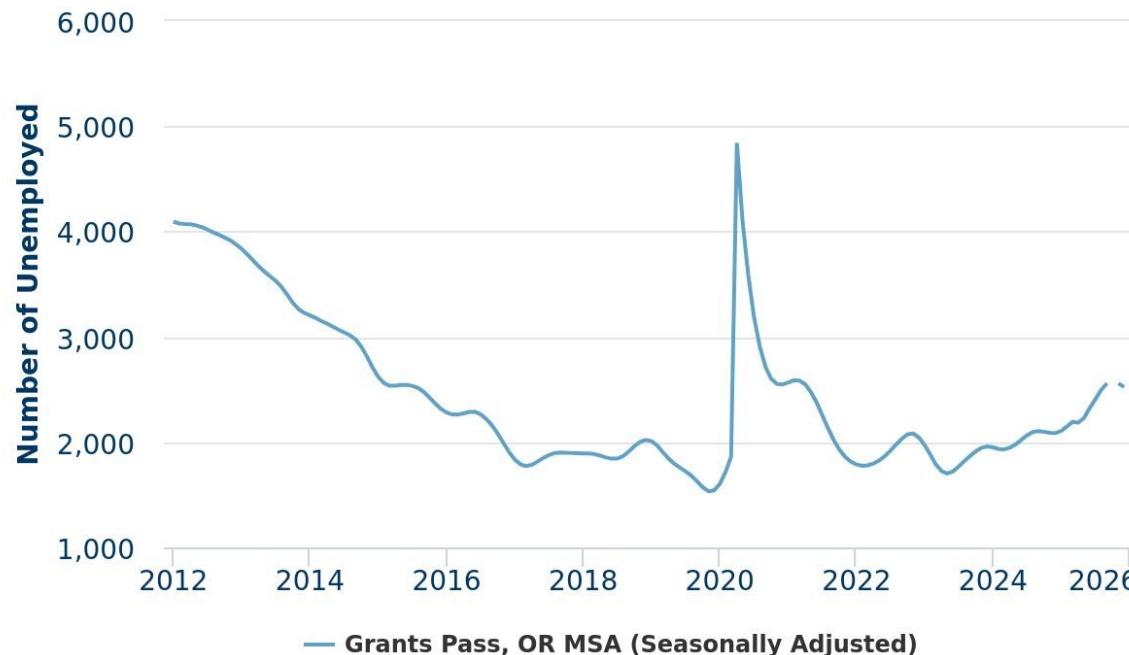


Source: Oregon Employment Department Qualityinfo.org

Jackson County **6,300 Unemployed** in December 2025- up from 5,285 December 2024 (+1,014)  
Jackson County **Employed** down about 100 over the year to 100,465 in December 2025

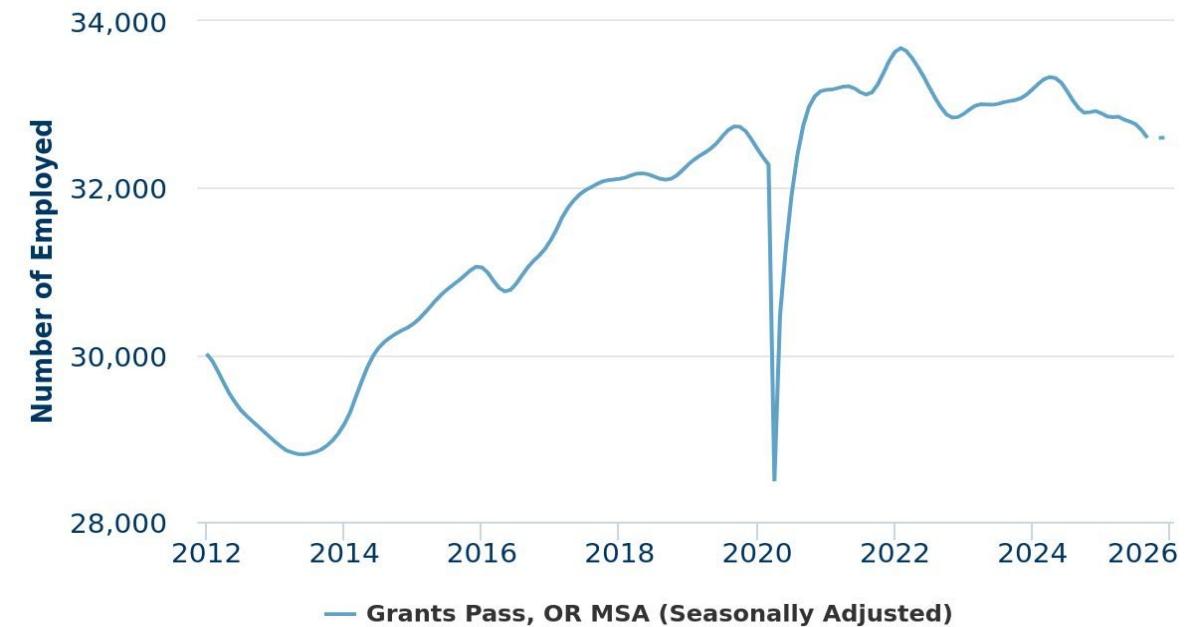
# ROGUE VALLEY SEEING RISING NUMBER OF UNEMPLOYED

## Number of Unemployed



Source: Oregon Employment Department Qualityinfo.org

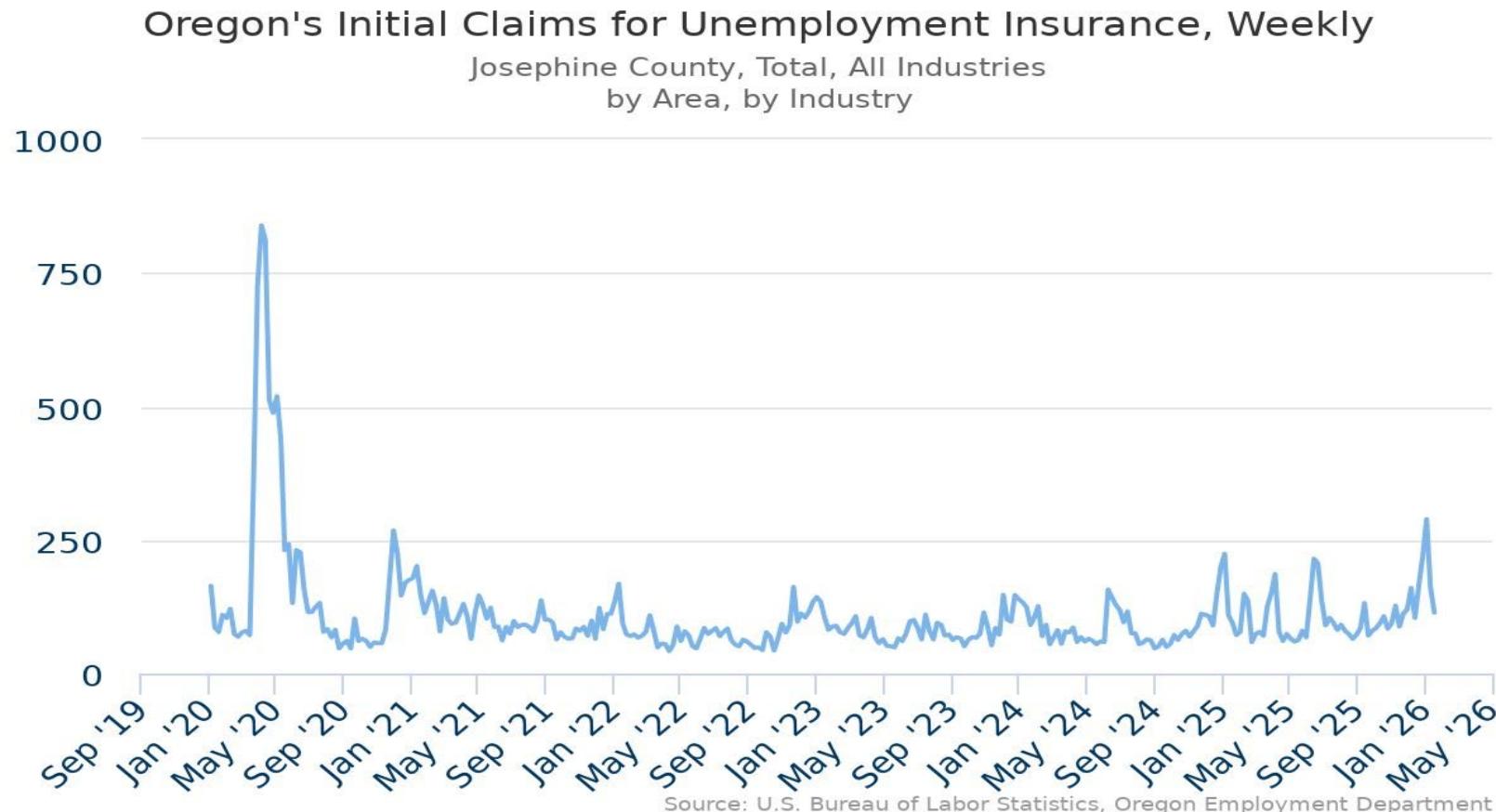
## Number of Employed



Source: Oregon Employment Department Qualityinfo.org

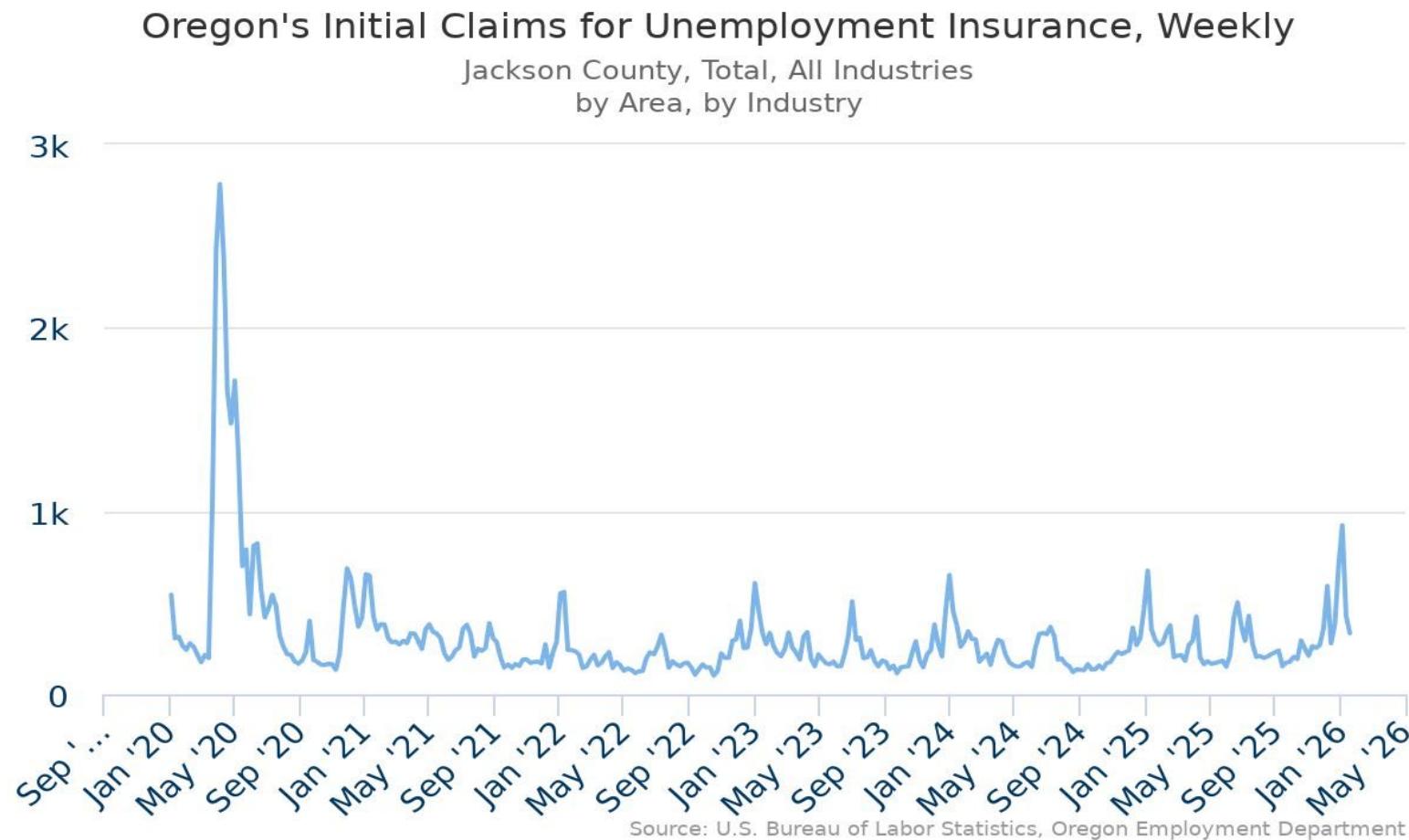
Josephine County 2,523 **Unemployed** in December 2025- up from 2,086 December 2024 (+437)  
Josephine County **Employed** down about 320 over the year to 32,603 in December 2025

# New initial claims for unemployment insurance rising in Josephine County.



783 Initial Claims  
past 4 weeks ending  
January 17, 2026  
up from 627 same  
4 weeks last year  
(+25%)

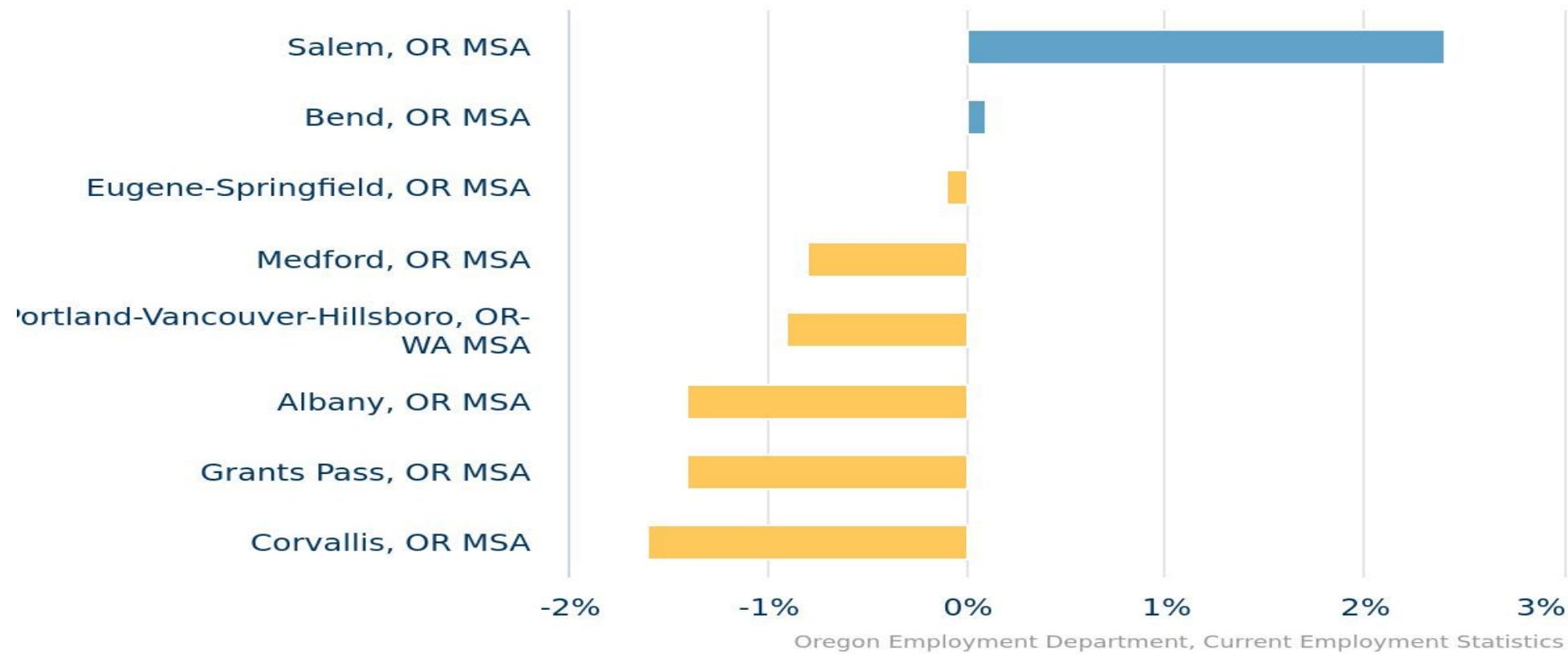
# New initial claims for unemployment insurance rising in Jackson County.



2,386 Initial Claims  
past 4 weeks ending  
January 17, 2026  
up from 1,792 same  
4 weeks last year  
(+33%)

## Employment Change in Oregon's Metro Areas

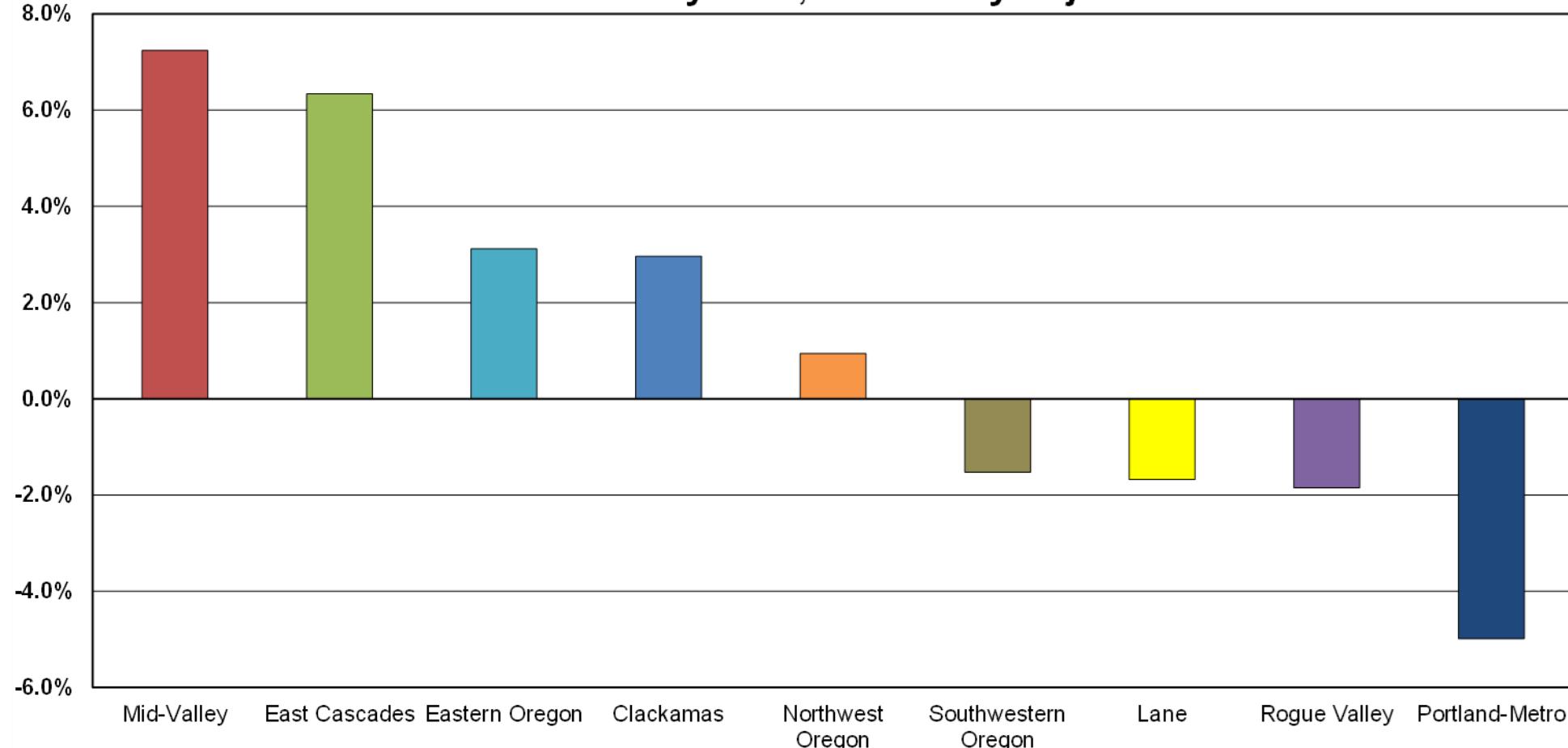
December 2024 to December 2025, Seasonally Adjusted



Jackson County down -0.8%, Josephine down -1.4 % (seasonally adjusted)  
Over the year

## Four of Nine Workforce Areas Have Less Jobs Than Before the Pandemic

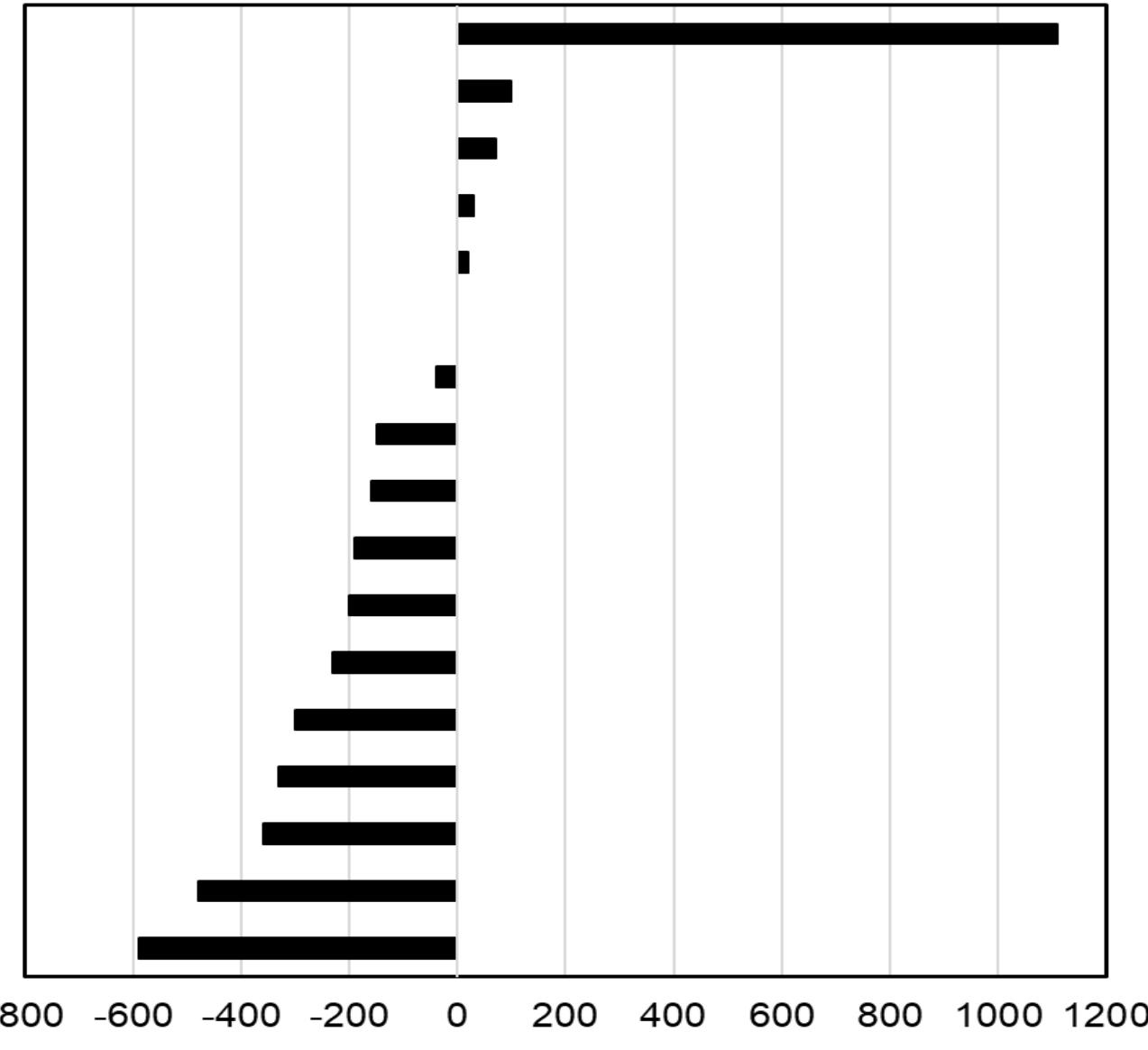
### Job Change Rates by Local Workforce Area as of November 2025 Since February 2020, Seasonally Adjusted



Source: Oregon Employment Department, Current Employment Statistics

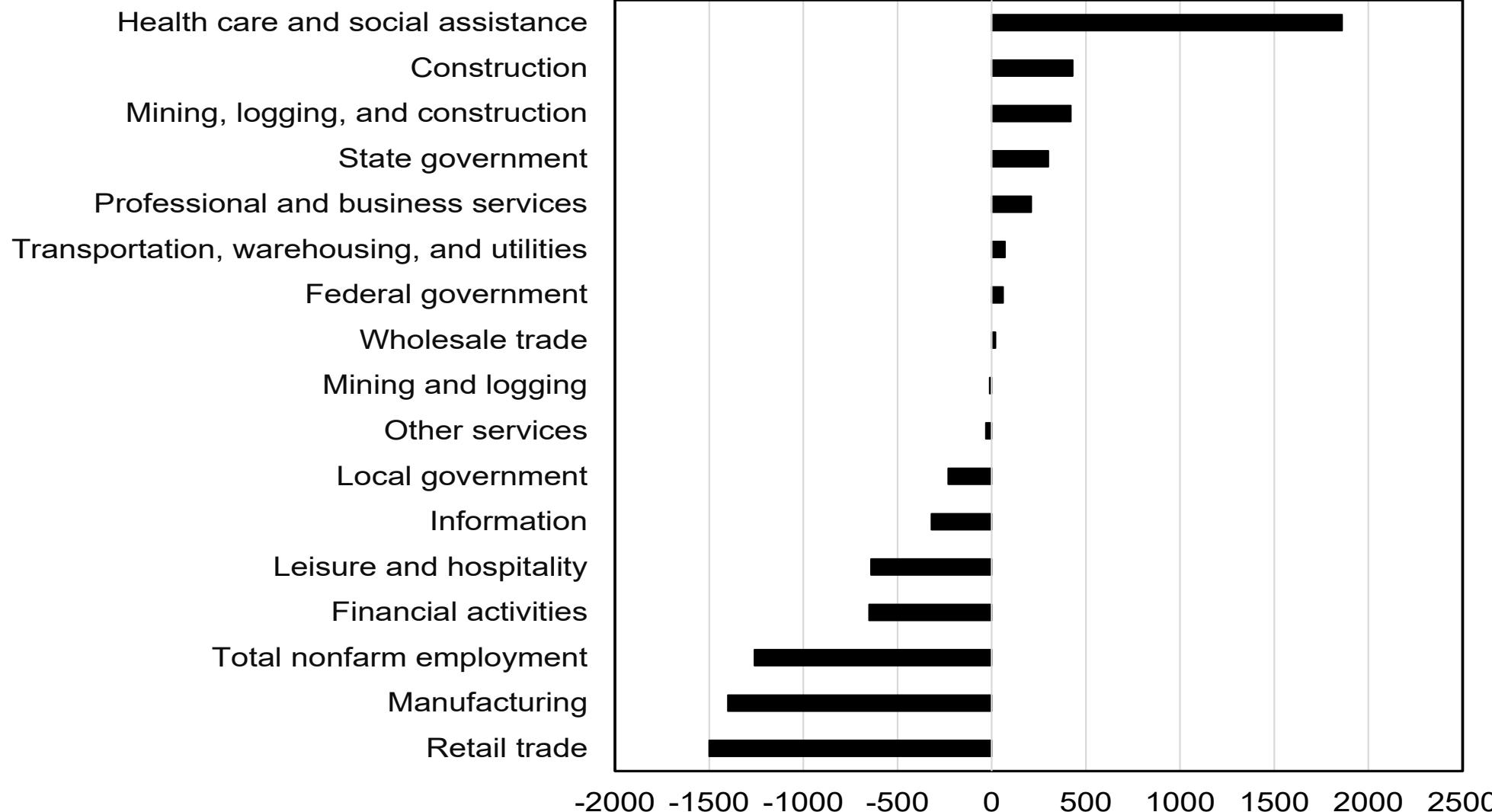
## Josephine County Payroll Employment Change December 2019 to December 2025

Private education and health services  
State government  
Federal government  
Other services  
Transportation, warehousing, and utilities  
Mining, logging, and construction  
Information  
Retail trade  
Government  
Leisure and hospitality  
Financial activities  
Wholesale trade  
Manufacturing  
Local government  
Trade, transportation, and utilities  
Professional and business services  
Total nonfarm employment



Source: Oregon Employment Department Current Employment Statistics

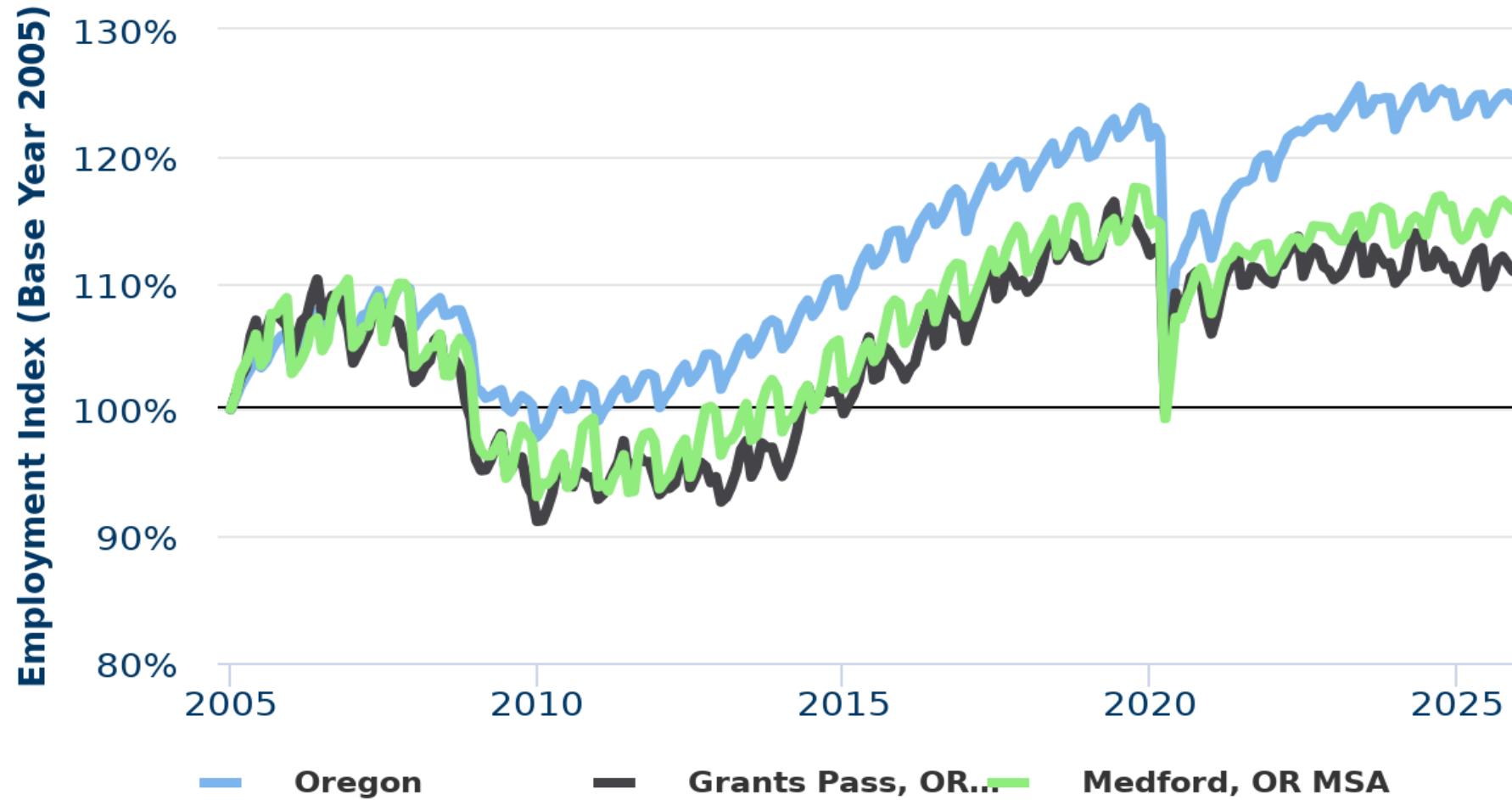
## Jackson County Payroll Employment Change December 2019 to December 2025



Source: Oregon Employment Department Current Employment Statistics

## Total Nonfarm Employment

Indexed to Show Job Growth Over Time, Base Year 2005



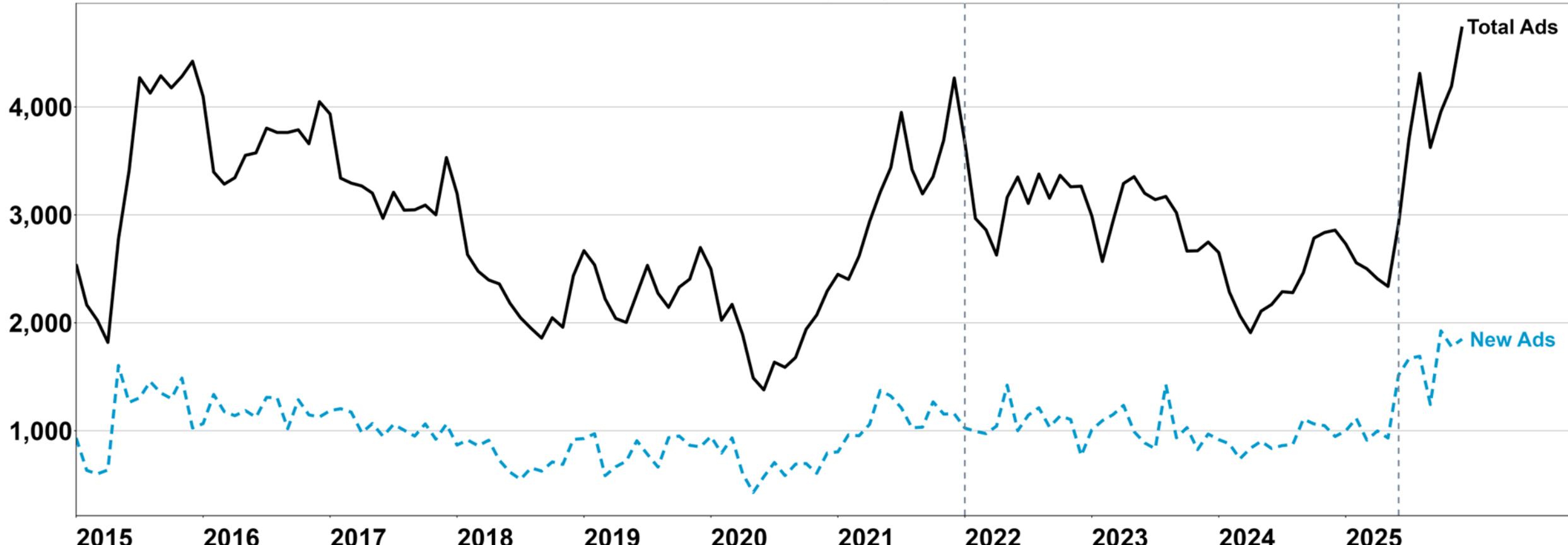
Source: Oregon Employment Department Qualityinfo.org

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 4,700 in December.  
The number of new ads increased by 70 over the month.

Seasonally Adjusted

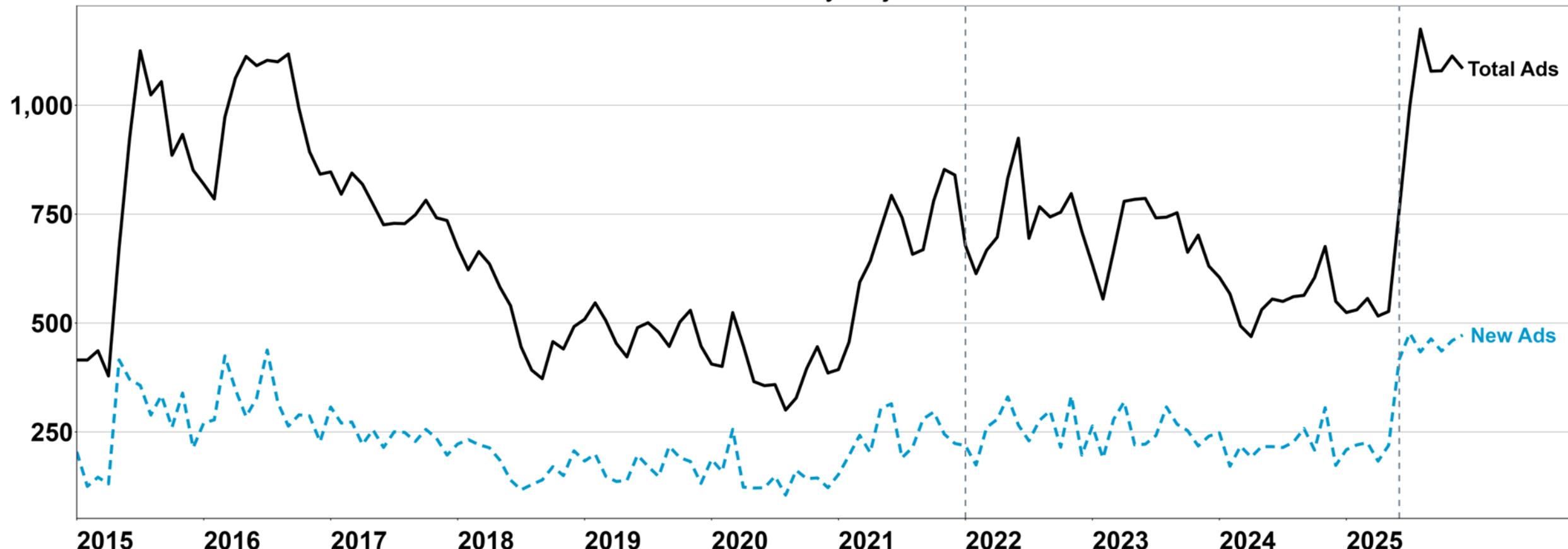


Source: The Conference Board Help Wanted OnLine® (HWOL)

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 1,100 in December.  
The number of new ads increased by 10 over the month.

Seasonally Adjusted

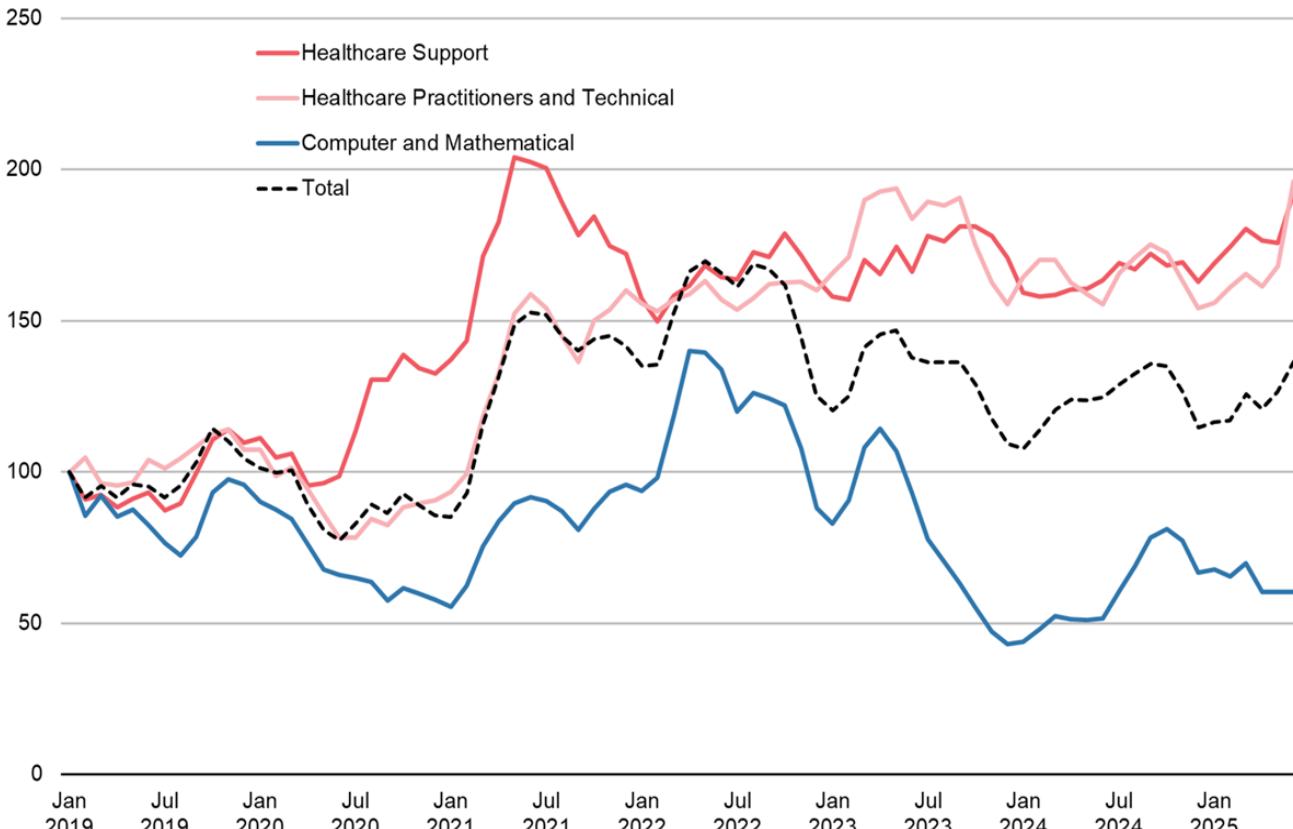


Source: The Conference Board Help Wanted OnLine® (HWOL)

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

## Online Job Postings by Occupation Group in Oregon - QualityInfo - QualityInfo

**Oregon Job Postings Trend, Jan 2019 - Jun 2025**  
(Indexed to Jan 2019 = 100, 3-Month Moving Average)



Source: Oregon Employment Department, Conference Board-Lightcast Help Wanted Online Series

**Top 10 Occupation Groups by New Job Postings in Oregon, January – June 2025**

Occupation Group	Postings	% of Total	LQ*
Healthcare Practitioners and Technical	27,236	11.9%	0.94
Sales and Related	25,812	11.3%	1.01
Management	23,031	10.1%	0.94
Office and Administrative Support	17,028	7.4%	0.96
Transportation and Material Moving	15,422	6.7%	1.11
Food Preparation and Serving Related	13,783	6.0%	1.05
Business and Financial Operations	12,872	5.6%	0.88
Healthcare Support	12,274	5.4%	1.28
Installation, Maintenance, and Repair	11,702	5.1%	1.16
Computer and Mathematical	10,302	4.5%	0.79

\* Location Quotient (LQ): The occupation's share of job postings in Oregon relative to its share nationwide. An LQ greater than 1 indicates an occupation with a higher concentration of job postings in Oregon compared with the U.S.

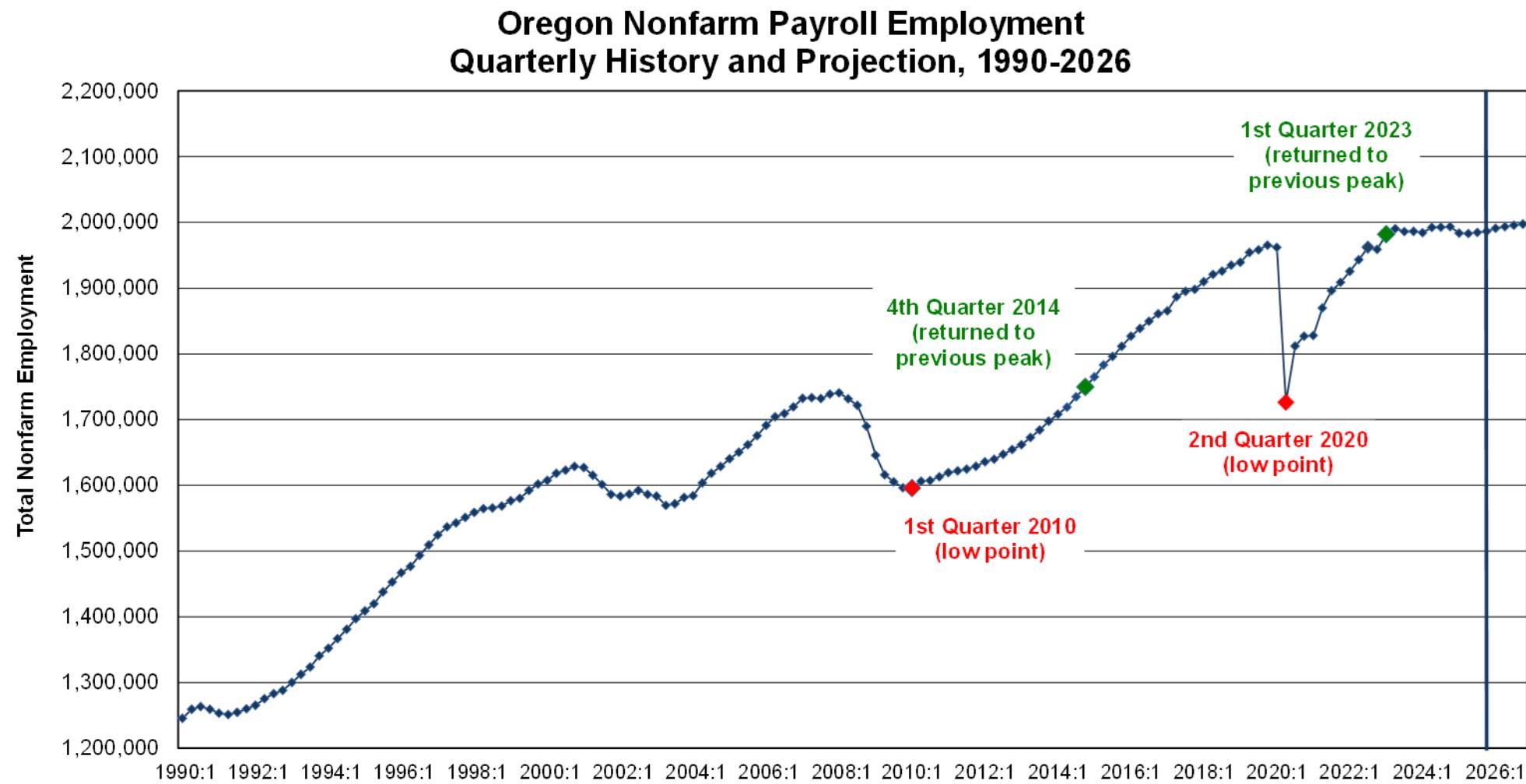
Source: Oregon Employment Department, Conference Board-Lightcast Help Wanted Online Series

# EMPLOYMENT AND WAGES (WESTERN U.S.)

- Several reports mentioned that fewer workers were switching jobs.
- Multiple contacts reported exploring AI implementation primarily for productivity enhancement and potential future workforce management. AI's current impact on employment was limited, with more significant effects anticipated in the coming years rather than immediately.
- Employers looking to hire received more applications for open positions.
- Nonetheless, difficulties persisted in attracting and retaining workers in engineering fields, mid-level management, health care, and the skilled trades.

# ECONOMIC ACTIVITY (OREGON AND REGION)

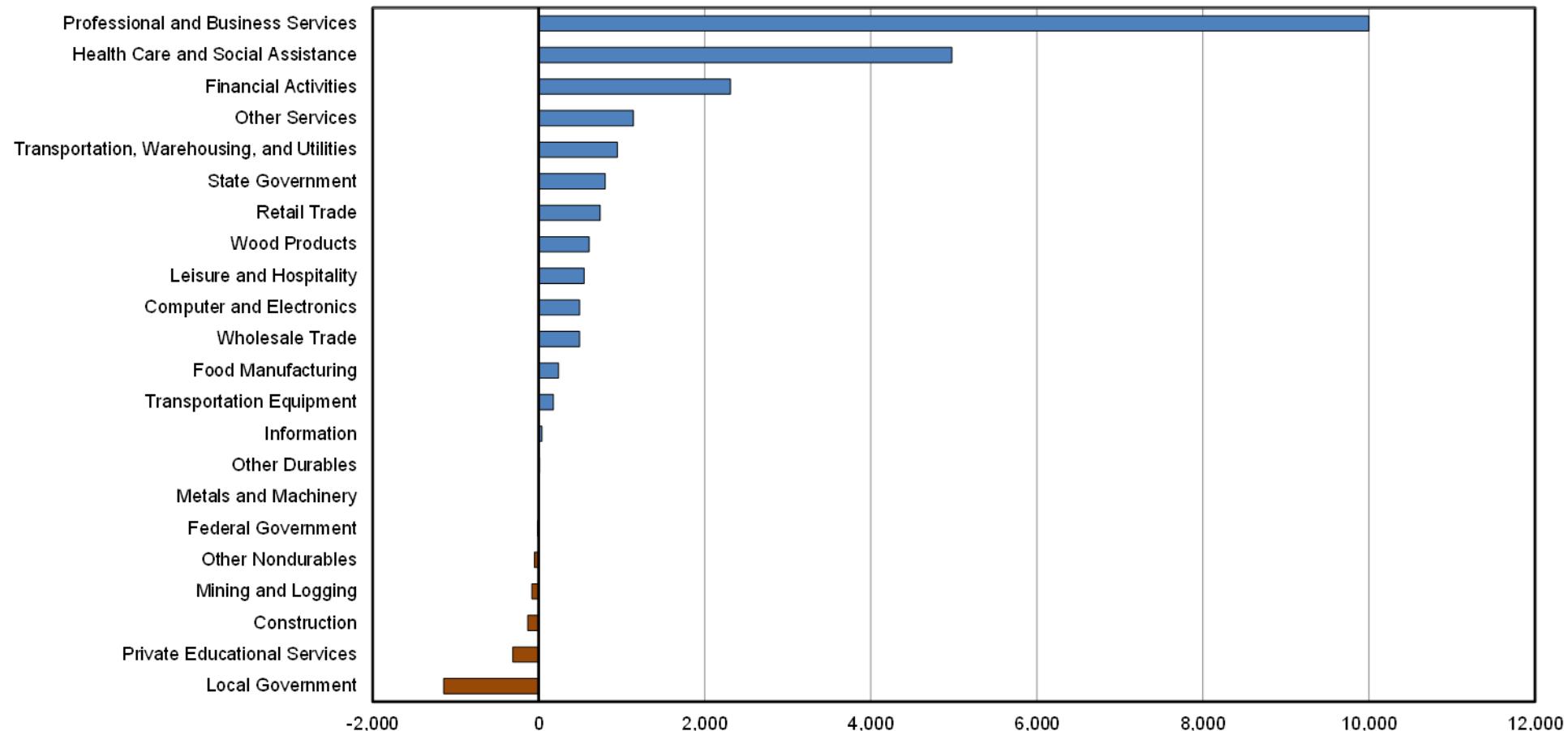
- Economic activity in the Twelfth District (Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah, and Washington) expanded modestly during the mid-November through December reporting period.
- Retail sales grew modestly overall, with muted holiday shopping in November giving way to **stronger-than-expected spending in December, stemming mainly from high-income consumers.**
- Employment levels were largely stable, although some contacts reported recent and planned layoffs.
- Conditions in the services, real estate, agriculture, and resource-related sectors were stable on net, while manufacturing activity softened somewhat.
- Lending activity increased slightly, as borrowing rates fell.
- **Demand for community services, particularly for food assistance and childcare, remained high.**
- Wages grew somewhat, and the rate of price increases intensified in recent weeks from a modest to moderate pace.
- Contacts' economic outlook improved slightly since the previous report.



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

# OEA EXPECTS OREGON TO GAIN ABOUT 11,400 JOBS IN THE NEXT 12 MONTHS.

## Expected Job Changes by Industry Sector Over The Year (4Q2025 - 4Q2026)

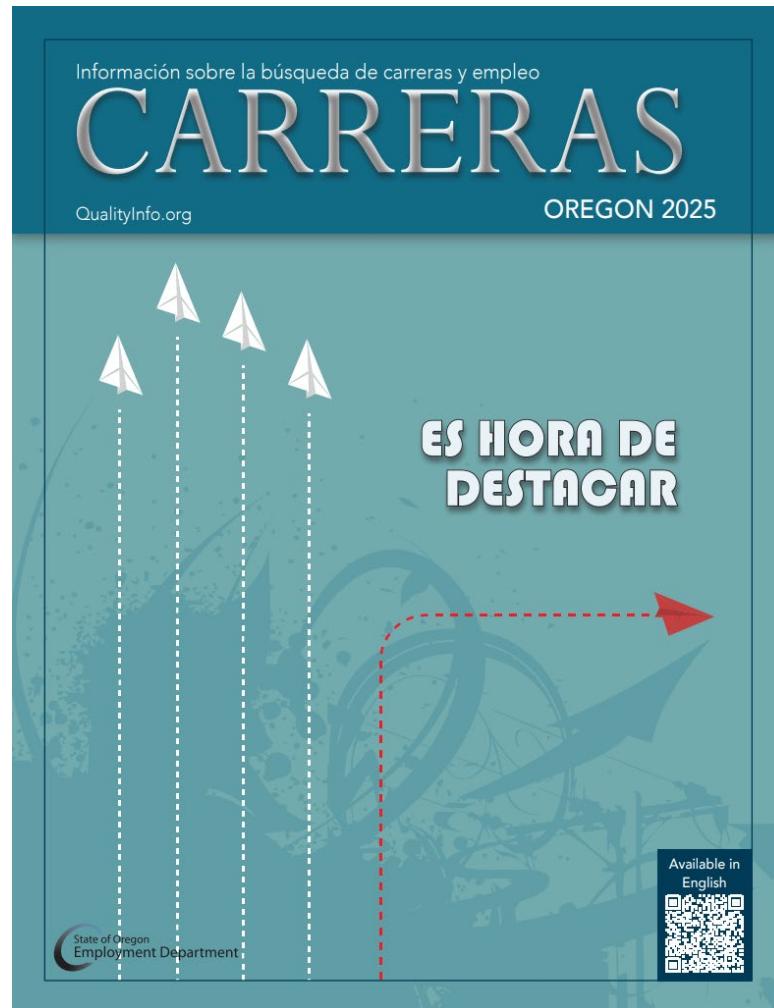
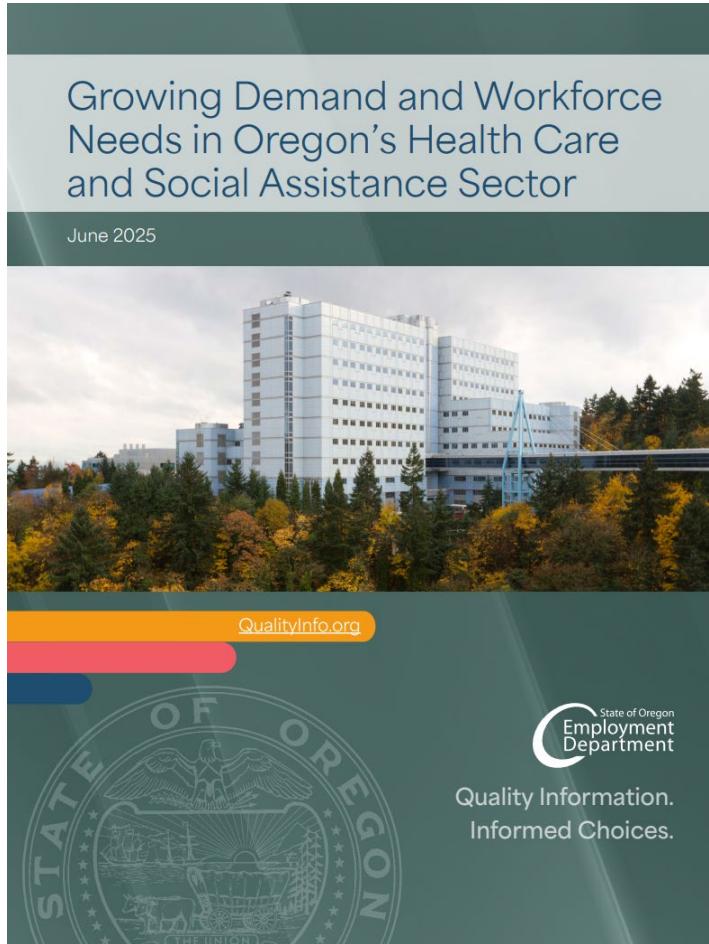


Source: Oregon Employment Department analysis using Oregon Office of Economic Analysis Forecast, December 2025

# OREGON EMPLOYMENT DEPARTMENT PROJECTS OVER 7,000 GROWTH OPENINGS AND 150,000 REPLACEMENT OPENINGS IN THE NEXT DECADE IN THE ROGUE VALLEY

## Industry Employment Projections, 2024-2034 Jackson and Josephine Counties

	2024	2034	Change	% Change
<b>Total employment</b>	<b>128,950</b>	<b>136,060</b>	<b>7,110</b>	<b>6%</b>
Total payroll employment	120,590	127,370	6,780	6%
Natural resources and mining	4,760	4,910	150	3%
Construction	6,370	6,900	530	8%
Manufacturing	9,560	9,670	110	1%
Wholesale trade	3,100	3,210	110	4%
Retail trade	17,590	17,580	-10	0%
Transportation, warehousing, and utilities	3,910	4,180	270	7%
Information	1,080	1,050	-30	-3%
Financial activities	5,320	5,380	60	1%
Professional and business services	9,610	10,510	900	9%
Health care and social assistance	24,570	27,800	3,230	13%
Leisure and hospitality	14,180	15,570	1,390	10%
Other services	3,940	4,150	210	5%
Government	15,300	15,090	-210	-1%
Federal government	2,250	2,070	-180	-8%
State government	1,840	1,910	70	4%
Local government	11,210	11,110	-100	-1%



# Thank You!

*Please scan the QR code for a short survey.*



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