

Applegate Valley, OR Economic Conditions Assessment



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Final Report

Prepared for
A Greater Applegate
7380 OR-238
Jacksonville, OR 97530

Wellington Wildlands Council
P.O. Box 1137
Jacksonville, OR 97530

Prepared by
The University of Oregon
Institute for Policy Research & Engagement
School of Planning, Public Policy, and Management

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Project Partners

Angelique Stewart, A Greater Applegate

Megan Fehrman, A Greater Applegate

Audrey Eldridge, Wellington Wildlands Council

Jeanette LeTourneux, Wellington Wildlands Council

Liza Crosse, Wellington Wildlands Council

Institute for Policy Research and Engagement Research Team

Melissa Graciosa, Project Director

Josh Bruce, Director for Applied Research

Lauren Van Vliet, Graduate Student Research Associate

About the Institute for Policy Research and Engagement



**School of Planning, Public
Policy and Management
Institute for Policy
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

Table of Contents

Executive Summary	4
Introduction	9
Study Framework and Key Definitions	9
Study Methodology	11
Applegate Valley Background	12
Rogue Valley Economic Context	17
Rogue Valley Industry Employment	17
Rogue Valley Industry Conditions	21
Applegate Valley Economic Profile	29
Applegate Valley Economic Conditions	29
Applegate Valley Business Establishments	39
Summary & Discussion	44
Rogue Valley Regional Economic Trends	44
Applegate Valley Local Economic Trends	45
Future Discussion	48
Appendix A. Detailed Methodology	49
Appendix B.	52
Goods-Producing Industries	52
Service-Providing Industries	53



Executive Summary

A Greater Applegate (AGA) with Wellington Wildlands Council (WWC) partnered with the Institute for Policy Research and Engagement (IPRE) at the University of Oregon (UO) to better understand the current economic base and drivers of the Applegate Valley in Southern Oregon. The applied research project aimed to produce an impartial report of the local economic conditions to support further community conversations.

This study recognizes that the approach to rural economic development, while still focused on job and business development, must also tailor approaches that are aware of rural conditions. As such, the outcomes of this study are discussed in relation to best practices in rural economic vitality. These practices include strategies that emphasize community capacity-building, cultivating deep collaborations and partnerships, aligning with regional efforts, building from widely supported community visions, and pursuing creative, non-traditional economic development strategies.

Rogue Valley Economic Trends

The top industries by percent of jobs in the Rogue Valley (Jackson and Josephine County) are:

1. Healthcare and social assistance;
2. Retail trade;
3. Government;
4. Leisure and hospitality; and
5. Manufacturing.

Both healthcare and social assistance and leisure and hospitality are projected to grow, adding an estimated 5,210 jobs to the regional economy by 2033. Occupations in healthcare and social assistance are typically higher wage jobs, with most occupations requiring post-secondary education. Jobs in leisure and hospitality are also projected to grow and are typically lower wage jobs (average annual wage ~27K).

Retail trade represents a diversity of service-providing sub-sectors such as the sale of building materials, motor vehicles, and food and beverage stores, amongst others. Store retailers include those selling retail in a physical location, selling products through methods such as TV commercials, catalogues, and temporary markets or pop-ups, and ecommerce activities.

The following industries have comparative concentrations of employment for the Rogue Valley in comparison to both state and national-level employment:

1. Agriculture, forestry, fishing, and hunting,
2. Retail trade, and
3. Healthcare and social assistance

The Location Quotient (LQ) is a statistical measure used primarily in economics and regional studies to analyze the concentration of a particular industry, occupation, or activity in a specific region compared to a broader reference area (such as the state or national average). LQs for agriculture, forestry, fishing and hunting identify this industry as regionally significant in generating economic activity across both sectors for the Rogue Valley, even despite trends projecting declines in job growth and historic data reporting decreased income across both the agriculture and timber industries.

Applegate Valley Economic Trends

There are approximately 2,626 jobs in study area for the Applegate Valley, with employment concentrated around Williams, Murphy, and Provolt.

By count of total jobs in 2021, the top industries in the Applegate Valley were:

1. **Agriculture, forestry, fishing and hunting** – total jobs: 485; 18% of all jobs.
2. **Educational services** – total jobs: 406; 15% of all jobs.
3. **Construction** – total jobs: 324; 12% of all jobs.
4. **Manufacturing** – total jobs: 290; 11% of all jobs
5. **Accommodation and Food Services** – total jobs: 200; 8% of all jobs

According to data available from the US Census OnTheMap tool, only 20% of the workforce lives and works in the Applegate Valley. Nearly 80% of workers commute from outside the Applegate Valley. Approximately 5,574 individuals who live in the Applegate Valley commute outside of the valley for work, most often to regional urban centers such as Grants Pass and Medford.

Jobs within the Applegate Valley has increased by 945 jobs since 2014, with some industries growing more rapidly than others. The top five industries by jobs added between 2014 – 2021 include:

1. **Agricultural, Forestry, Fishing, and Hunting** – jobs added: 315; percent growth: 185%
2. **Construction** - jobs added: 183; percent growth: 130%
3. **Accommodation and Food Service** - jobs added: 111; percent growth: 125%.
4. **Manufacturing**- jobs added: 103; percent growth: 55%
5. **Professional, Scientific, and Technical Services** – jobs added: 86; percent growth: 148%
6. **Retail Trade** – jobs added: 77; percent growth: 73%

2022 County Business Patterns report the number of business establishments and business size for ZIP codes that overlap with the Applegate Valley study area. The top five industries by number of business establishment in 2022 include:

1. **Construction** – # of businesses: 168, 18% of total businesses
2. **Healthcare and social assistance** - # of businesses: 118; 12% of total businesses
3. **Retail Trade** - # of businesses:104; 11% of total businesses
4. **Professional, scientific, and technical services** - # of businesses: 93: 10% of total businesses
5. **Accommodation and food services** - # of businesses: 83; 9% of total businesses

Approximately 80% of total business establishments in the Applegate Valley ZIP codes have nine or fewer employees and 62% have less than five employees. The business establishment data also suggests that there are fewer businesses in agriculture, forestry, fishing, and hunting and educational services, but that they employ larger workforces.

The percent of the local workforce engaged in agriculture, forestry, fishing and hunting is higher relative to jobs available in the Rogue Valley and represents a local concentration of these activities, as shown by a LQ value of 9.79. Other industries with significant LQs included: **educational services (11.29), construction (1.99), professional, scientific, technical services (1.56)**. It is likely that these industries support economic activities across all sectors. However, other industries with lower location quotients may also suggest where there are opportunities for business development and local entrepreneurship, especially those with positive regional trends such as retail trade and accommodation and food services.

The following table compares across different data sets for how the top industries in the Applegate Valley are ranked from highest to lowest using numbers 1-10.

Table 1 - Top 10 Industries in the Applegate Valley Summary

rank	# of jobs in 2021	Industry growth (%) 2014-2021*	Jobs added (#) 2014-2021	2022 (#) Business establishments**
1	Agriculture, Forestry, Fishing and Hunting (485)	Agriculture, Forestry, Fishing and Hunting (185%)	Agriculture, Forestry, Fishing and Hunting (+315)	Construction (168)
2	Educational Services (406)	Finance and Insurance (154%)	Construction (+183)	Health care and social assistance (118)
3	Construction (324)	Professional, Scientific, and Technical Services (148%)	Accommodation and Food Services (+111)	Retail Trade (104)
4	Manufacturing (290)	Construction (130%)	Manufacturing (+103)	Professional, Scientific, and Technical Services (93)
5	Accommodation and Food Services (200)	Public Administration (129%)	Professional, Scientific, and Technical Services (+86)	Accommodation and Food Services (83)
6	Retail Trade (183)	Accommodation and Food Services (125%)	Retail Trade (+77)	Other Services (except Public Admin) (70)
7	Professional, Scientific, and Technical Services (144)	Retail Trade (73%)	Finance and Insurance (+54)	Real estate and rental and leasing (59)
8	Administration & Support, Waste Management and Remediation (106)	Manufacturing (55%)	Administration & Support, Waste Management and Remediation (+30)	Administration & Support, Waste Management and Remediation (53)
9	Other Services (except Public Admin) (97)	Information (50%)	Wholesale Trade (+19)	Manufacturing (42)
10	Finance and Insurance (89)	Wholesale trade (42%)	Public Administration (+18)	Finance and Insurance (32)
*Reported for industries with more than 15 total jobs. **Boundaries for business establishment data are by ZIP code and differ from the exact geography used to aggregate employment and industry growth data.				

Next Steps

Our project team recommends the following prompts for further community discussion related to the results of this economic study:

- What strategies can be used to support top industries in the Applegate Valley in ways that align with the community’s environmental and economic goals?

- What types of innovations, access to capital, or other resources would businesses or workers in these industries require to build on the Applegate Valley’s unique strengths and meet the goals of the community vision, such as resilience, sustainability, and economic vitality?
- What opportunities are there to make connections across the region that amplify and maintain the uniqueness and strengths of the Applegate Valley and benefit from resources available in regional urban centers?
- What types of business support or training do current or future businesses need and want that can align with positive regional trends such as the increase in retail trade and accommodation and food services?

Future research expanding on this general assessment of Applegate Valley economic conditions may focus on:

- A study designed to more specifically detail the conditions of the sub-sectors agriculture and forestry.
- Community engagement activities that seek to describe the perspectives and opinions of workers in the Applegate Valley.
- Case studies and community engagement that identifies strategies that support local retail trade and accommodation and food services that align with regional trends that point to growth in these sectors.

Introduction

A Greater Applegate (AGA) with Wellington Wildlands Council (WWC) partnered with the Institute for Policy Research and Engagement (IPRE) at the University of Oregon (UO) to better understand the current economic base and drivers of the Applegate Valley in Southern Oregon.

The applied research project aimed to produce an impartial report of the local economic conditions to support further community conversations on local economic development priorities. Specifically, this study aimed to:

1. Detail industry, employment, and wage data for the Applegate Valley; and
2. Increase the accessibility of economic data for further local conversations about the current benefits and impacts of leading industries and generally supporting strategies that advance rural economic vitality in the Applegate.

Study Framework and Key Definitions

This study defines economic development as the “activities, organizations, and resources that contribute to a **community’s well-being** through factors of **job-creation, business growth, and income growth...** as well as through **improvements to the wider social and natural environment that strengthen the economy.**”¹ This definition recognizes that job and business development are still the primary focus of economic development efforts, while acknowledging broader public interests that impact, influence, and shape local economies, such as social equity or natural resource stewardship. Ultimately, this definition emphasizes that economic development is a tool for contributing to a community’s overall well-being.

This study recognizes that the approach to rural economic development, while still focused on job and business development, must also tailor approaches that are aware of rural conditions. These conditions include smaller populations, unincorporated places, undefined community boundaries, limited access to data that describes local conditions, and historic and culturally significant connections to natural resource industries, amongst others.

As such, the outcomes of this study are discussed in relation to best practices in rural economic vitality. These practices include strategies that emphasize community capacity-building, cultivating deep collaborations and partnerships, aligning with regional efforts, building from widely supported community visions, and taking risks on creative, non-traditional economic

¹ Moore, Meck, and Ebenhoh (2006) Economic Development Toolbox: Strategies and Methods. Planning Advisory Service Report Number 541. American Planning Association.

development strategies.^{2,3}Specifically, our study framework assumes the following components are critical components of rural economic vitality:

- **Community Capacity Building** – strengthen the communities' existing human capital: research indicates that building strong social capital is more effective at sparking development than traditional recruitment. Working from a shared vision created by the community and on-going community engagement can support the long-term success of economic initiatives.
- **Aligning with Regional Efforts** – recognize the connections and opportunities between rural and urban: rural communities are part of a larger regional economy which can reinforce strategies that are mutually beneficial and amplify the unique qualities and opportunities within a region. Rural areas and adjacent urban centers can work together while still tailoring economic strategies that recognize differences in the spatial distribution of economic activity.
- **Building on Unique Strengths** – support what already exists and is unique about the community: move beyond concentrating and perpetuating limitations. Standard approaches may not fit the current conditions, political will, or interests of the community. Building on unique strengths may also look like innovation in historic industries to meet modern contexts and community needs.
- **Self-Development/Local Entrepreneurship** – grow from within: in addition to building general community capacity, support those residents with business ideas that might create job opportunities for the region.

Lastly, this study is intended to build from the goals and strategies detailed in the Applegate Valley Vision focus area: Prosperous and Vital which states, “A prosperous and vital Applegate Valley supports an innovative, locally-based, rural economy and a healthy work environment through the creation of Village Hubs, encouraging conscious, community-based tourism, contributing to a strong Business Network, and facilitating a dynamic art, music and theater scene.”⁴

2 Rick Hundey Management and Planning Services. "Best Practices in Rural & Small-Town Economic Development." Huron Business Development Corporation – Municipal Economic Development Initiative. January 2004. http://www.smallbusinesshuron.ca/publications/edri/best_practices_report_final.PDF

3 Porter, Michael. "Economic Development in Rural Areas: Key Steps for Boosting Rural Economies." <http://www.isc.hbs.edu/competitiveness-economic-development/research-and-applications/Pages/economic-development-in-rural-areas.aspx>

4 A Greater Applegate (2022) Applegate Valley Vision: Community Vision Plan. Retrieved from <https://agreaterapplegate.org/vision-plan/>

Study Methodology

This report draws on economic data for the Applegate Valley available from existing resources at the federal, state, regional, county, and local scale including employment and wage data, worker demographics, business establishment characteristics, and industry trends. We acknowledge that available and accurate economic data for a rural and unincorporated area, such as the Applegate Valley, is an on-going challenge and have sought, when possible, to draw from multiple resources to define localized economic conditions. It is important to note that available datasets may vary by year and by geography and is specified throughout the discussion.

This report reflects data from the following sources:

- 2022 American Community Survey (ACS) 5-year Estimates
- 2022 Regional Economic Accounts from the Bureau of Economic Analysis (BEA)
- 2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics
- 2021 Nonemployer Statistics from the US Census Bureau
- 2023 Local Area Unemployment Statistics (LAUS) from the Bureau of Labor Statistics
- 2022 Census of Agriculture from the National Agricultural Statistics Service
- 2023 - 2033 State of Oregon Employment Department (OED) Industry Employment Projections
- Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) accessed through the online application Census OnTheMap
- 2022 County Business Patterns from the US Census Bureau

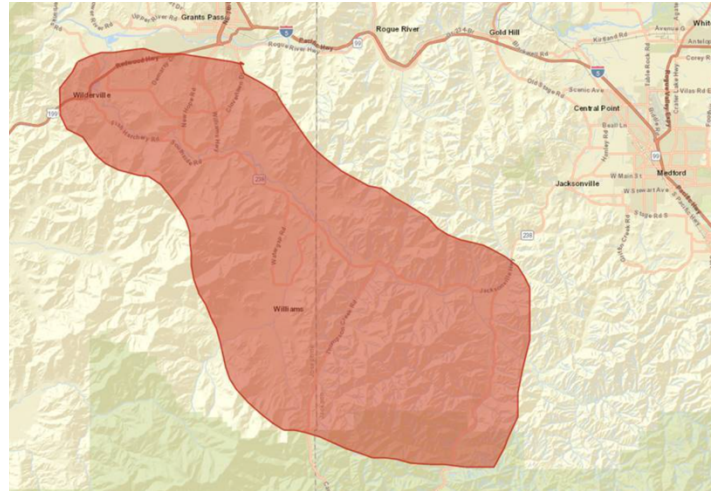
Please see the Appendices A for more specific descriptions and access to sites where data originated. Where relevant, methods are discussed throughout the report.

Applegate Valley Background

The following section provides a high-level overview of community demographics for the Applegate Valley in Jackson and Josephine County. Where possible, we have reported data specifically for the Applegate Valley using the boundary as defined by the Rural Development Initiative (RDI), which represents 428.25 square miles, as shown in Figure 1. Where relevant, we have included information at the county-level.

This section will also briefly describe historic industries within the Applegate Valley and southwestern Oregon. Many of the Applegate Valley's historic industries still contribute to the modern economy and shape the cultural context and identity of the community.

Figure 1 - RDI's Applegate Valley Service Area Boundary



Community Demographics

In 2020, the Applegate Valley had a total population of 17,927 individuals, which had grown by approximately 5% between 2010 and 2020. The population has become increasingly older with a median age of 52 years old, which is older than the median age for both Jackson (42 years old) and Josephine County (47 years old).⁵ Individuals in the Applegate Valley aged 65 or older have increased since 2010; school-aged children (age 10 to 19 years old) and mid- to late-career adults (age 45 to 64) have shrunk. Table 1 provides a detailed breakdown of age changes between 2010 and 2020 for the Applegate Valley.

⁵ Median age for Jackson and Josephine County as reported by the 2022 American Community Survey 5-year estimates. Median age for the Applegate Valley based on 2020 US Census as reported by RDI for the study area.

Table 2 – Applegate Valley, OR Population by Age Between 2010 - 2020

Population by Age	2010		2020		2010 - 2020	
	Count	%	Count	%	# Change	% Change
0 to 4	665	4%	688	4%	23	3%
5 to 9	751	4%	793	4%	42	6%
10 to 14	953	6%	916	5%	-37	-4%
15 to 19	1008	6%	892	5%	-116	-12%
20 - 24	668	4%	708	4%	40	6%
25 - 34	1322	8%	1670	9%	348	26%
35 to 44	1684	10%	1880	10%	196	12%
45 to 54	2738	16%	2088	12%	-650	-24%
55 to 64	3400	20%	2987	17%	-413	-12%
65 to 74	2370	14%	3242	18%	872	37%
75 to 84	1167	7%	1602	9%	435	37%
85+	398	2%	461	3%	63	16%
Total	17124		17927		803	4.7%

Source: 2010 US Census; 2020 US Census as reported by RDI for the study area

The racial and ethnicity demographics for the Applegate Valley have also shifted between 2010 and 2020. However, overall counts of individuals identifying as Black, American Indian, Asian, and Pacific Islander are small, and the data should be interpreted with caution. Individuals identifying as some other race has increased by over 100% between 2010 and 2020 but remains a relatively small proportion of the overall population. Individuals who identify as two or more races grew over 250% and represent approximately 9% of the Applegate Valley. See Table 2 for additional detail.

Table 3 - Applegate Valley, OR Race and Ethnicity Demographic Change Between 2010 - 2020

	2010		2020		2010 - 2020	
	count	%	count	%	% change	By count
White Alone	16129	94%	15547	87%	-4%	-582
Black Alone	44	0%	66	0%	50%	22
American Indian Alone	201	1%	182	1%	-9%	-19
Asian Alone	107	1%	128	1%	20%	21
Pacific Islander Alone	13	0%	18	0%	38%	5
Some other race Alone	170	1%	360	2%	112%	190
Two or more races	458	3%	1625	9%	255%	1167
Hispanic Origin (any race)	772	5%	1151	6%	49%	379

Source: 2010 US Census; 2020 US Census as reported by RDI for the study area

Racial and ethnicity demographic trends for Jackson and Josephine County also closely resemble the trends within the Applegate Valley according to the 2022 American Community 5-year Estimates. In 2022, Jackson County’s population was 89% White Alone and 7.5% Two or More Races; Josephine County’s population was 85% White Alone and 8% Two or More Races. Populations of individuals identifying as Hispanic Origin of any race are higher at the County level with 8% and 14% for Jackson and Josephine County respectively.

Additional shifts for the Applegate Valley include changes to average household size, housing tenure, and income. The tables detail changes between 2010 and 2020. Overall, owner-occupied units have increased, while renter-occupied has decreased. Average household size has slightly increased to 2.5 from 2.4 between 2010 and 2020.

Table 4 – Applegate Valley, OR Changes in Housing Tenure between 2010 – 2020

	2010	2020
Average Household Size	2.44	2.52
Owner Occupied Housing Units	5609	5795
Renter Occupied Housing Units	1385	1292

Source: 2010 US Census; 2020 US Census as reported by RDI for the study area

The 2024 Esri projections show that there is a higher percentage of Applegate Valley households earning \$200,000 or more annually than at the county-level, shifting the median income upward for the valley. The projected median household income for the Applegate Valley is higher than both Jackson and Josephine County. Approximately 46% of the Applegate Valley households are earning between \$50,000 - \$149,000 annually.

Table 5 – Applegate Valley, OR Household Income, 2024

	2024 Esri Projection		2022 AC 5-year Estimates			
	Applegate Valley		Jackson County		Josephine County	
	Count	%	Count	%	Count	%
<\$15,000	660	9%	7765	9%	3724	10%
\$15,000 - \$24,999	547	8%	7179	8%	3968	11%
\$25,000-\$34,999	509	7%	7999	9%	3662	10%
\$35,000-\$49,999	657	9%	11244	13%	5067	14%
\$50,000-\$74,999	1067	15%	15415	17%	6418	18%
\$75,000 - \$99,999	1035	14%	13011	14%	4594	13%
\$100,000- \$149,999	1232	17%	14795	16%	4818	13%
\$150,000-\$199,999	519	7%	6256	7%	1879	5%
\$200,000+	978	14%	6212	7%	2080	6%
Households	7204		89,876		36,210	
Median Household Income	\$78,011		\$67,690		\$56,068	

Source: 2010 US Census; 2020 US Census as reported by RDI for the study area; 2022 ACS 5-year Estimates

Applegate Valley Historic Industries (1850s – 1990s)

The historic roots of the Applegate Valley’s economy revolved around the activities of mining, agriculture, and timber.

In 1850, the promise of gold brought the mining industry to the Applegate Valley. Prospectors in southwestern Oregon discovered gold on Josephine Creek, the Illinois River, and in creeks near Jacksonville.⁶ Media publicity of the discovery brought miners and their families to the Applegate Valley to stake their own claims.⁷ With some exceptions, the initial gold boom in southwestern Oregon ended by the late 1860s and left behind an immensely altered landscape. In the 1880s, the placer mining industry in the Applegate Valley boomed again with the increased use of hydraulic mining operations. These operations pulled vast volumes of water from the Applegate River and further impacted the natural hydrology with use of piping and ditch systems to divert water.⁸ While there are still some smaller-scale mining operations in the Applegate Valley today, gold mining went bust by the 1890s in conjunction with a national economic depression.⁹

In tandem with the boom of the gold mining industry, US Congress passed the Donation Land Claim Act in 1850 and Euro-American settlers came to southwestern Oregon in pursuit of free, farmable land.¹⁰ Early agriculture in the Applegate Valley included ranching, fruit orchards, hops, wine grapes, and other general farming.¹¹ The Swiss immigrant Peter Britt, also referred to as the “father of the Southern Oregon fruit industry”, planted a variety of fruit crops, including wine grapes, and opened Oregon’s first winery, Valley View Winery, in 1873.¹² In 1900, after the completion of the railroad, local land promoters began to endorse the large-scale development of pears, apples, and other fruits. Prohibition-era policies inhibited the further growth of the wine industry. Post-WWII, the production of pears was Jackson County’s leading industry with nearly 12,000 acres of orchards.¹³ Agriculture continued to be an important industry within the Applegate Valley as continued by a resurgence in the 1960s and 1970s as part of the

6 Atwood, Kay & Gray, Dennis J. (2014) As Long as the World Goes On: The Land and People of Southwest Oregon. Oregon History Project. Retrieved from <https://www.oregonhistoryproject.org/narratives/as-long-as-the-world-goes-on-the-land-and-people-of-southwest-oregon/new-names-on-the-land/gold>

7 A Greater Applegate (2025) Waves of Wanderers. Retrieved from <https://wanderapplegate.com/history/>

8 LaLande, Jeff (2022) Applegate River. Oregon Encyclopedia. Retrieved from https://www.oregonencyclopedia.org/articles/applegate_river/

9 Atwood, Kay & Gray, Dennis J. (2014)

10 Atwood, Kay & Gray, Dennis J. (2014)

11 Josephine County (1981; 2005) Josephine County Comprehensive Plan. Agriculture. Retrieved from <https://cms9files.revize.com/josephinecounty/or/Comprehensive%20Plan%20-%20Complete%20Book.pdf>

12 Oregon Wine Board (N.D.) Applegate Valley AVA. Retrieved from <https://www.oregonwine.org/regions/rogue-valley/applegate-valley-ava/>

13 Jackson County (1994) Jackson County Comprehensive Plan. Agricultural Element. Retrieved from <https://jacksoncounty.or.gov/Document%20Center/Departments/Development%20Services/Planning/Comprehensive%20Plan/08%20-%20AGRICULTURE%20LAND.pdf>

counterculture “Back to the Land” movement where individuals sought to escape cities and return to agrarian lifeways.

Other initial settlers in the 1850s turned to the timber industry. Initial demands for timber were fed by the needs of early mining operations, an increasing population, and the construction of the railroad. By the 1930s, the national demand for lumber to support WWII efforts positioned timber as a pillar of the southwestern Oregon’s economy. Large lumber companies such as Georgia-Pacific, Roseburg Lumber, U.S. Lumber, and Weyerhaeuser gained control of most of the region’s timber production. Local logging and sawmill operations grew in number and the size of workforce to meet the market demands. By the 1990s, the timber industry began to decline across the state as advances in technology, the passage of federal regulations, and environmental interests came to a head in what some colloquially refer to as the “Timber Wars”.^{14,15}

14 Atwood, Kay & Gray, Dennis J. (2014) Claiming the Land.

15 OPB (2020) Timber Wars. Retrieved from <https://www.opb.org/show/timberwars/>

Rogue Valley Economic Context

The following section provides context of the current economic conditions within Jackson and Josephine Counties, also referred to as the Rogue Valley, and which includes the smaller regional area of the Applegate Valley. It is important to note that in this context, the Rogue Valley is being used only in reference to the two-county region and their municipal boundaries. The following data is pulled from the US Census, US Bureau of Labor Statistics, US Bureau of Economic Analysis, and USDA National Agriculture Statistics Service and reported by Headwater Economics Profile System. Data may differ in year reported.

Rogue Valley Industry Employment

Table 5 shows the top three industries in the Rogue Valley by percent of total jobs. The following sections provide more detailed information related to projected employment trends, comparative concentration of employment, and industry-specific trends for agriculture, timber, and tourism.

Table 6 - Top 3 Industries by Job Count in the Rogue Valley, 2022; 2023

#	Jackson County (2022)	Josephine County (2023)
1	Healthcare and Social Assistance (15%)	Healthcare and Social Assistance (20%)
2	Retail Trade (14%)	Retail Trade (13%)
3	Government (9%)	Accommodation and food services (8%)

2022, 2023 Bureau of Economic Analysis, Regional Economic Accounts

Rogue Valley Employment Trends

The State of Oregon Employment Department (OED) projects industry employment trends annually for 10-year time horizons. The following table shows projections for the Rogue Valley from 2023 through 2033. OED projects the **largest increase** by both number of jobs and percent growth in industry employment **for private educational and health services and leisure and hospitality, which includes accommodations and food services**. Projected industry employment in mining and logging is estimated to decline by 10 jobs in the same period.

Table 7 – OED Industry Employment Projections for the Rogue Valley, OR, 2023 - 2033

	Employment (by #) 2023	Projected Employment (by #) 2033	Projected Change (#) (2023-2033)	Projected Percent Change (2023-2033)
Total Employment	131,920	140,990	9,070	7%
Private educational and health services	27,980	31,520	3,540	13%
Retail trade	17,650	17,710	60	0%
Government	14,920	15,050	130	1%
Leisure and hospitality	14,160	15,830	1,670	12%
Manufacturing	9,990	10,350	360	4%
Professional and business services	9,850	10,820	970	10%
Self-employment	8,540	8,950	410	5%
Construction	6,590	7,280	690	10%
Financial activities	5,480	5,580	100	2%
Natural Resource - agriculture, fishing, hunting, other	4,040	4,250	210	5%
Other services	4,030	4,280	250	6%
Transportation, warehousing, and utilities	3,970	4,420	450	11%
Wholesale trade	3,190	3,390	200	6%
Information	1,000	1,040	40	4%
Mining and Logging	530	520	-10	-2%
2022- 2032 State of Oregon Employment Department (OED) Industry Employment Projections				

Rogue Valley Location Quotient

The Location Quotient (LQ) is a statistical measure used primarily in economics and regional studies to analyze the concentration of a particular industry, occupation, or activity in a specific region compared to a broader reference area (such as the state or national average). It allows researchers to understand whether a region has a high or low concentration in a certain area relative to a larger region, helping to identify regional economic specializations and strengths.¹⁶ The following table provides a high-level description of how to interpret LQ values.¹⁷

¹⁶ American Planning Association. "Understanding the Location Quotient."

¹⁷ State of New York (2017) Location Quotient: A Statewide and Regional Analysis. Division of Research and Statistics. Retrieved from <https://dol.ny.gov/system/files/documents/2021/03/location-quotients-a-statewide-and-regional-analysis.pdf>

Table 8 - Interpreting Location Quotient Values

Value of Location Quotient	Interpretation
LQ > 1.00	Industry is producing more than is locally consumed. LQs greater than 1.25 typically represent significant export industries.
LQ = 1.00	Local production is meeting local demand
LQ < 1.00	Industry is producing less than is locally consumed. LQs less than 1.00 rely on services and goods from outside the region and may represent opportunities for business development to meet local demand.

LQ analysis was initially developed by economist, Robert Haig, to evaluate basic and non-basic sectors under Haig’s Economic Base Theory (EBT). EBT is widely used in economic analysis today and assumes that the regional economy grows by selling goods and services. Firms that produce more than is locally consumed are considered “basic sectors”. The income produced by basic sectors through exporting goods and services is then magnified through being re-circulated through the local economy. “Non-basic sectors” are those that largely sell to local residents. Income produced by basic sectors work to positively impact across both the basic and non-basic sectors of the regional economy through generating increased demand.

The following tables describe Jackson and Josephine County’s concentration of employment by industry using 2022 County Business Pattern data from the US Census. Table 8 shows relative concentration of employment for Jackson and Josephine County as compared to the state of Oregon. LQ Values greater than 1.25 are highlighted in green to show significant export industries for the region.

Table 9 - Location Quotient of Jackson and Josephine County Compared to State Employment Levels, 2022

	Jackson County	Josephine County
Accommodation and food services	1.07	1.45
Administrative and support and waste management and remediation services	0.63	0.96
Agriculture, forestry, fishing and hunting	2.49	1.47
Arts, entertainment, and recreation	1.17	0.82
Construction	0.97	0.74
Educational services	0.71	0.51
Finance and insurance	0.82	0.79
Health care and social assistance	1.26	1.32
Industries not classified	1.13	0.00
Information	0.89	0.38
Management of companies and enterprises	1.08	0.29
Manufacturing	0.84	0.98
Mining, quarrying, and oil and gas extraction	1.74	0.00
Other services (except public administration)	0.92	0.83
Professional, scientific, and technical services	0.55	0.54
Real estate and rental and leasing	0.78	1.26
Retail trade	1.29	1.47
Transportation and warehousing	1.14	0.43
Utilities	0.61	0.46
Wholesale trade	0.71	0.48

At the state-level, both Jackson and Josephine County have comparative concentrations (LQ values greater than 1.25) of employment in agriculture, forestry, fishing, and hunting, health care and social assistance, and retail trade. These industries represent basic sectors for the Rogue Valley regardless of projected declines in employment levels from OED. Mining, quarrying, and oil and gas extraction have a comparative advantage for the local economy in Jackson County relative to the state, however overall employment in this industry is low (124 in Jackson County, 1530 in Oregon). Accommodation and food services and real estate and rental and leasing in Josephine County have higher comparative concentrations than the rest of the state.

Table 9 shows the LQ for Jackson and Josephine County as compared to national employment. Trends for agriculture, forestry, fishing, and hunting, health care and social assistance, and retail trade are consistent in Jackson and Josephine County at both the state- and national-level. However, LQ values of 17.02 and 10.03 for agriculture, forestry, fishing and hunting in Jackson and Josephine County respectively underlines the significance of this historic industry as part of the basic sector of the local economy.

Table 10 - Location Quotient for Jackson and Josephine County Compared to National Employment Levels, 2022

	Jackson County	Josephine County
Accommodation and food services	1.12	1.52
Administrative and support and waste management and remediation services	0.42	0.65
Agriculture, forestry, fishing and hunting	17.02	10.03
Arts, entertainment, and recreation	1.12	0.78
Construction	1.23	0.93
Educational services	0.54	0.39
Finance and insurance	0.63	0.60
Health care and social assistance	1.32	1.39
Industries not classified	0.89	0.00
Information	0.75	0.32
Management of companies and enterprises	1.29	0.35
Manufacturing	0.98	1.15
Mining, quarrying, and oil and gas extraction	0.43	0.00
Other services (except public administration)	0.94	0.84
Professional, scientific, and technical services	0.48	0.47
Real estate and rental and leasing	0.89	1.44
Retail trade	1.42	1.62
Transportation and warehousing	1.08	0.41
Utilities	0.63	0.48
Wholesale trade	0.72	0.48

Rogue Valley Industry Conditions

Rogue Valley Agriculture

Agriculture accounts for 1.8% of total employment (2022) in Jackson County and 2% of total employment (2023) in Josephine County. Increasingly, farm proprietors make up larger percentages of total workers engaged in agricultural activities in the Rogue Valley. Employment levels across county have varied. Farm employment between 1970 and 2022 has **decreased by 38 jobs (-1.6%) in Jackson County** and **increased by 334 jobs (+65%) in Josephine County**. See Table 6 for additional detail.

Farm earnings and net income, including corporate farms, have also decreased since the 1970s. In Jackson County, farm earnings have decreased by 79% from \$40.7M in 1970 to \$8.4M in 2022. In the same timeframe, net income, including corporate farms, has also decreased from \$1.28M to ~\$38K. In Josephine County, farm earnings decreased by 91% from \$11.9 M in 1970 to \$1M in 2022. Similarly, net income in the same timeframe decreased from \$6.3M to \$6.7K.

Table 11 - Total Farm Employment in the Rogue Valley, 2022

	Jackson County	Josephine County
Total Employment	130,009	43,365
Farm Employment	2,368	847
<i>Farm Proprietor Employment</i>	1,722	632
Non-farm employment	127,641	42,518
2023 Bureau of Economic Analysis, Regional Economic Accounts		

Table 7 shows the average employee wage. Since 2001, average annual wages in both crop (~\$31.6K to ~\$42.6K) and animal production (~\$33.5K to ~\$43.4K) have increased in Jackson County. In Josephine County, average annual wage in crop production increased from ~\$33.7K to ~\$35.4K and average annual wage in animal production decreased from ~\$35K to ~\$21K.

Table 12 - Average Annual Wage in Agriculture in the Rogue Valley, 2023

	Jackson County	Josephine County
Total private and public (2023)	\$55,855	\$47,702
Total private	\$54,526	\$46,176
Farm	\$42,660	\$34,567
<i>Crop production</i>	\$42,603	\$35,372
<i>Animal production</i>	\$43,371	\$21,151
Non-farm	\$54,696	\$46,379
2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics		

Table 8 shows farms by size and type in Jackson and Josephine County. Table 9 shows a further breakdown of farms by number and production type.

Table 13 - Farms by size and type in the Rogue Valley, 2022

	Jackson County	Josephine County
Number of farms (2022)	2396	605
Land in Farms (Acres)	202,864	30,563
<i>Cropland</i>	44,474	10,636
<i>Woodland</i>	62,482	9,107
<i>Land in farmsteads and buildings</i>	17,902	2,344
<i>Permanent pasture and rangeland</i>	78,004	8,476
Average farm size (acres)	85	51
Approx % of land in farms	11.4%	3%
2022 Census of Agriculture from the National Agricultural Statistics Service		

Table 14 - Farm by Crop or Animal Production Type in the Rogue Valley, 2022

	Jackson County		Josephine County	
	#	%	#	%
Number of farms (2022)	2396		605	
<i>Oilseed and grain</i>	4	0%	0	7%
<i>Vegetable and melon</i>	98	4%	40	9%
<i>Fruit and nut tree</i>	228	10%	56	9%
<i>Greenhouse, nursery, floriculture</i>	104	4%	57	26%
<i>Other crop</i>	627	26%	160	22%
<i>Beef cattle ranch and farm</i>	621	26%	132	0%
<i>Cattle feedlots</i>	9	0%	0	1%
<i>Dairy cattle and milk production</i>	17	1%	4	0%
<i>Hog and pig</i>	23	1%	0	5%
<i>Poultry and egg</i>	140	6%	30	4%
<i>Sheep and goat</i>	161	7%	24	17%
<i>Animal aquaculture and other animal production</i>	364	15%	102	0%

2022 Census of Agriculture from the National Agricultural Statistics Service

The category of “Other crop”, as shown in Table 8, accounts for all other crops not disaggregated into their own group or farms growing a combination of crops with no one crop accounting for one-half or more of production. Examples include tobacco, cotton, sugarcane, hay, herbs, spices, and grass seed, amongst others. Marijuana grown in an open field would be accounted for under “Other Crop”, excluding marijuana cultivated under cover, which would fall into “Greenhouse, nursery, and floriculture”.

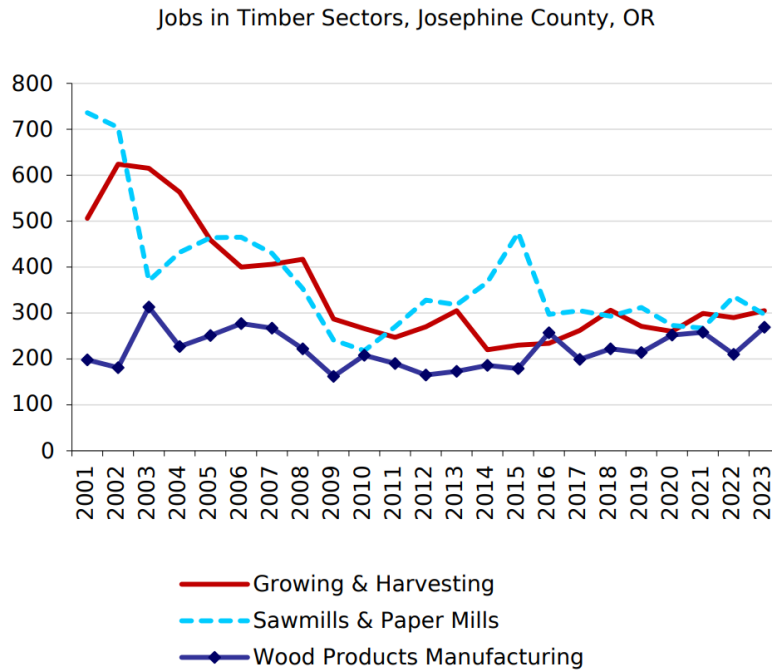
Marijuana harvest, price, and sales data is available by county and month from the [Oregon Liquor and Cannabis Commission \(OLCC\)](#). OLCC data shows October as peak harvesting season. More than 5.7M pounds of marijuana were harvested in October 2024. Since legalization in Oregon, marijuana sales account for approximately \$7.2B (between 10/2016 and 12/2024). In November of 2024, more than \$3.4M of marijuana was sold in Jackson County and more than \$1.3M of marijuana was sold in Josephine County.

Rogue Valley Timber and Wood Products

In 2023, timber accounted for 4.8% of total jobs in Jackson County and 2.8% of total jobs in Josephine County. **Timber employment in Jackson County has grown by 58 jobs since 2001** but decreased in total percentage (-1%) of county employment. Jobs categorized under harvesting grew, while mill and timber manufacturing jobs shrank. **In Josephine County, timber employment has decreased by 569 jobs** in the same time frame. However, the share of timber manufacturing jobs grew, while harvesting and mill jobs decreased. See Table 10 for additional detail. Additionally, Figures 2 and 3 show the trend of jobs within timber changing from 2001 to

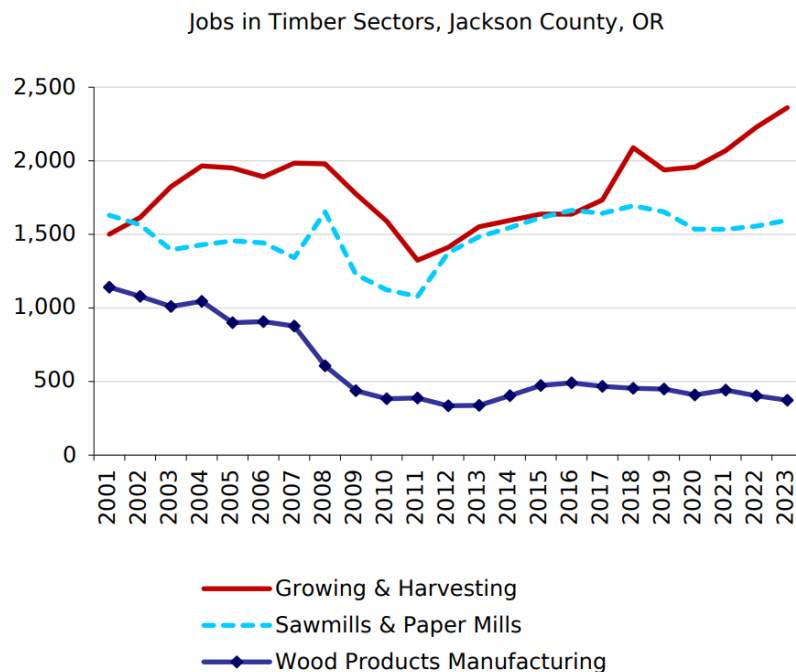
2023. Note that these two figures **do not offer a comparison across Jackson and Josephine Counties** given that they are at different scales along the y-axis.

Figure 3 - Trends in Timber Jobs by Sector in Josephine County, OR from 2001 - 2023



2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics

Figure 2 - Trends in Timber Jobs by Sectors in Jackson County, OR from 2001-2023



2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics

Table 15 - Timber Employment in the Rogue Valley, 2023

	Jackson County	Josephine
Total Employment	91,045	31,018
Timber	(4,330)	(871)
Growing and Harvesting	2,361	306
<i>Forestry and Logging</i>	511	127
<i>Support Activities for Forestry</i>	1,850	178
Sawmills and Papermills	1,596	(297)
Wood Products Manufacturing	373	(269)
Non-timber	86,715	30,147
2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics		

Self-employed timber proprietors, as shown in Table 11 account for smaller percentages of total timber employment. However, self-employed timber proprietors in Jackson County have decreased since 1998, from 138 to 99, and grown in Josephine County from 90 to 104.

Table 16 – Count of Self-Employed Timber Proprietors in the Rogue Valley, 2021

	Jackson County	Josephine County
Total proprietors (all sectors)	17,932	6,350
Timber	99	104
<i>Forestry and Logging</i>	65	78
<i>Wood Products Manufacturing</i>	34	26
<i>Paper manufacturing</i>	(na)	(na)
Non-Timber	17,833	6,246
2021 Nonemployer Statistics from the US Census Bureau		

While timber may account for smaller shares of overall Rogue Valley employment, **timber jobs are typically higher paying than other private industry**, as shown in Table 12.

Table 17 - Timber Sector Wages in the Rogue Valley, OR, 2023

	Jackson County	Josephine County
All sectors	\$55,855	\$47,702
Private	\$54,526	\$46,176
Timber	\$65,045	\$69,991
<i>Forestry and Logging</i>	\$66,732	\$65,746
<i>Wood Products Manufacturing</i>	\$64,703	\$70,359
<i>Paper manufacturing</i>	\$78,663	(na)
Non-Timber	\$54,214	\$45,636
Public	\$65,491	\$60,290
2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics		

From 2001 to 2023, average wages in forestry and logging in Jackson County decreased from ~\$71.8K to ~\$66.K and average wages in wood products manufacturing grew from ~\$56.5 K to ~\$64.7K. In the same time frame in Josephine County, wages in both forestry and logging (~\$48.8K to ~\$65.7K) and manufacturing (~\$50K to ~\$70.3K) grew.

Rogue Valley Travel and Tourism

In 2023, travel and tourism account for 17% of total employment in Jackson County and 14% of total employment in Josephine County. Table 13 provides a detailed breakdown of industries included under travel and tourism.

Table 18 – Travel and Tourism Industries by Job Count in the Rogue Valley, OR, 2023

2023	Jackson County	Josephine County
Total Employment	91,045	31,018
Travel & Tourism Related	(15,870)	(4,416)
Retail Trade	4,814	862
<i>Gasoline Stations</i>	716	361
<i>Clothing and Accessory Stores</i>	515	116
<i>Misc. Retailers</i>	3,583	385
Passenger Transportation	181	(27)
Arts, Entertainment, and Recreation	(1,680)	(375)
<i>Performing Arts and Spectator Sports</i>	(553)	14
<i>Museums, Parks, and Historic Sites</i>	(194)	(84)
<i>Amusement, Gambling, Rec</i>	933	277
Accommodation and Food	9,195	3,152
<i>Accommodation</i>	1,307	392
<i>Food Services and Drinking Places</i>	7,888	2,760
Non-travel and tourism	75,175	26,602
2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics		

Travel and tourism in the Rogue Valley have grown. Since 2001, employment has grown by 5,032 jobs in Jackson County and 1,441 jobs in Josephine County. Increase across sub-sectors across the valley has consistently grown. In Jackson County, travel and tourism-related jobs grew by 46% between 2001 and 2023; In Josephine County, travel and tourism-related jobs grew by 48% in the same period. Table 18 shows a detailed break-down of sub-sector growth between 2001 and 2023 by County.

Table 19 - Travel and Tourism by Job Growth in the Rogue Valley, OR, 2001 – 2023

2023	Jackson County			Josephine County		
	2001	2023	Change	2001	2023	Change
Travel & Tourism Related	10,838	15,870	46%	2,975	4,416	48%
<i>Retail Trade</i>	2,214	4,814	117%	609	862	42%
<i>Passenger Transportation</i>	71	181	155%	17	27	59%
<i>Arts, Entertainment, and Recreation</i>	1,372	1,680	22%	265	375	42%
<i>Accommodation and Food</i>	7,181	9,195	28%	2,084	3,152	51%

2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics

Figures 4 and 5 show the seasonality of unemployment in Jackson and Josephine County. Across the Rogue Valley, unemployment typically declines in April and September and increases mid-summer and throughout winter months.

Figure 5 - Seasonality of Unemployment in Jackson County, OR, 2023

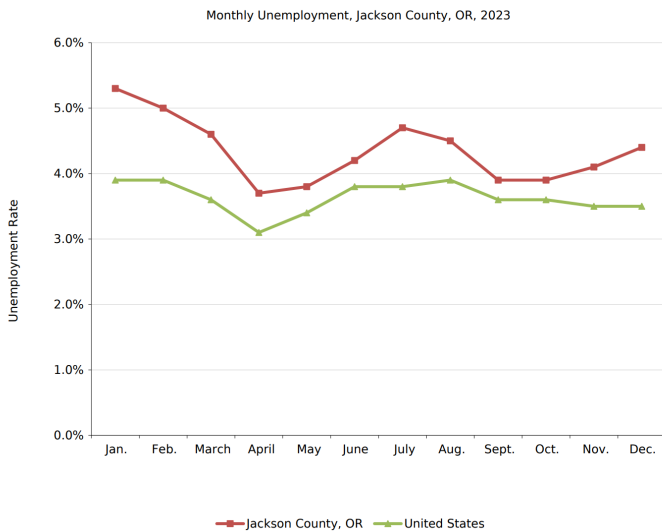
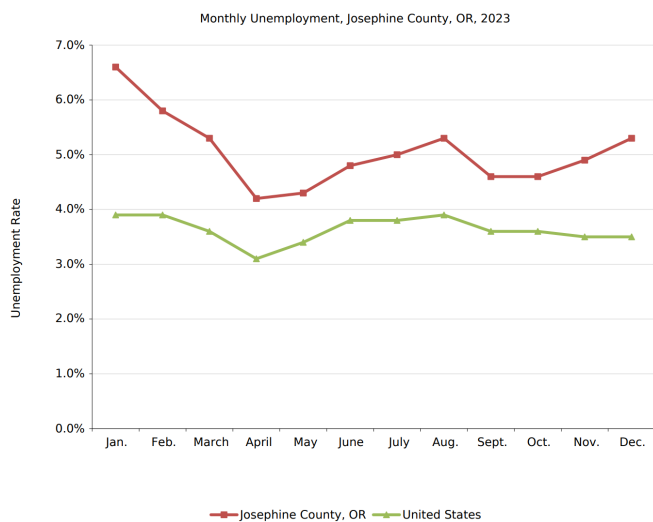


Figure 5 - Seasonality of Unemployment in Josephine County, OR, 2023



Source: 2023 Local Area Unemployment Statistics (LAUS) from the Bureau of Labor Statistics

In 2023, wages in travel and tourism were generally lower than the average wage across all sectors, excluding passenger transportation. Table 15 provides a detailed breakdown of average wage by travel and tourism sector and sub-sector.

Table 20 - Wages in Travel and Tourism in Rogue Valley, OR, 2023

2023	Jackson County	Josephine County
All Sectors	\$55,855	\$47,702
Travel & Tourism Related	\$30,029	(25,308)
Retail Trade	\$37,389	\$29,229
<i>Gasoline Stations</i>	\$32,889	\$31,003
<i>Clothing and Accessory Stores</i>	\$22,815	\$26,523
<i>Misc. Retailers</i>	\$40,383	\$28,382
Passenger Transportation	\$69,054	(\$52,597)
Arts, Entertainment, and Recreation	\$30,943	\$29,533
<i>Performing Arts and Spectator Sports</i>	\$44,862	\$106,794
<i>Museums, Parks, and Historic Sites</i>	\$32,225	\$25,373
<i>Amusement, Gambling, Rec</i>	\$23,313	\$25,733
Accommodation and Food	\$25,255	\$23,602
<i>Accommodation</i>	\$26,405	\$25,681
<i>Food Services and Drinking Places</i>	\$25,065	\$23,307
Non-travel and tourism	\$60,515	(\$50,058)
2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics		

Applegate Valley Economic Profile

The following sections will explore the Applegate Valley's current economic profile using the following data accessed through the US Census OnTheMap tool and US Census 2022 County Business Pattern data. Given the challenging of obtaining existing valid and accurate data for a network of rural and unincorporated communities, our project team cautions that data should be interpreted in context to regional economic conditions. A supplementary document details the results of a business survey distributed locally as a companion to this study, which represents a non-representative sample of business owners in the Applegate Valley.

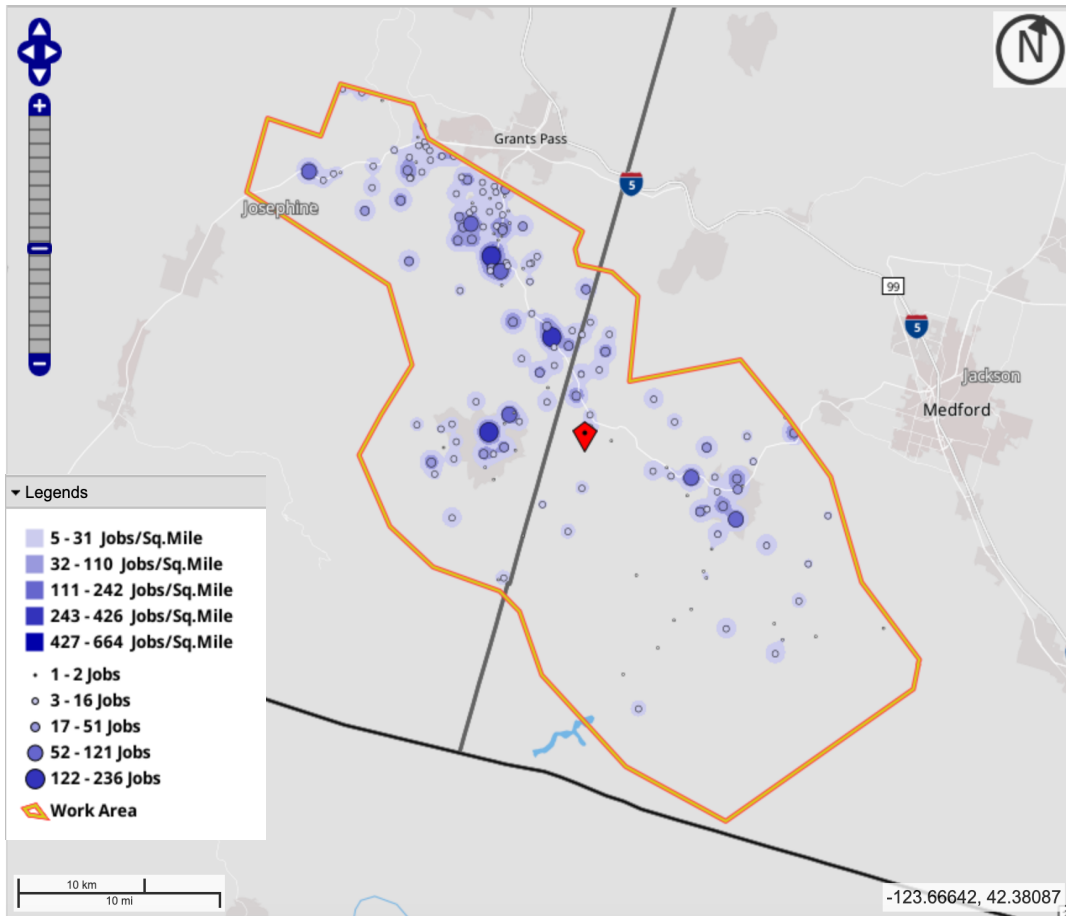
Applegate Valley Economic Conditions

The follow sections report economic data by job characteristics and flow of workers in and out of the Applegate Valley for 2021 using the US Census OnTheMap tool which reports data from Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES), Unemployment Insurance (UI) Wage Records, and Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics. See [Appendix A](#). for further discussion of methods and geographies used.

Applegate Valley Jobs, By Number and Concentration

In 2021, there were a total of 2,626 jobs in the study area representing the Applegate Valley. The following graphic shows job concentration in shades of purple, with the darkest shades representing the highest concentrations and the lighter shades showing lower concentration. The highest concentration of jobs, shown in dark purple, were in Williams, Murphy, and Provolt and their surrounding area. The second highest concentration of jobs are in the areas surrounding Ruch in Jackson County and Wilderville in Josephine County.

Figure 6 - Job Concentration in the Applegate Valley, OR, 2021



Source: US Census OnTheMap

Jobs, by Worker Demographics

The following tables provide a more detailed breakdown of 2021 worker characteristics including worker age, sex, race, ethnicity, earnings, and educational attainment.

Jobs by Worker Age. About 53% of the workforce is between the ages of 30 and 54.

Table 21- Jobs by Worker Age in the Applegate Valley, 2021

	Count	Percentage
Age 29 or Younger	574	22%
Age 30 to 54	1386	53%
Age 55 or Older	666	25%

Jobs by Worker Sex. There are more workers who reported their sex as male, than female. Note that the US Census does not currently collect information on gender, nor include other categories beyond male or female to report sex.

Table 22 - Jobs by Worker Sex in the Applegate Valley, 2021

	Count	Percentage
Male	1,468	56%
Female	1,158	44%

Jobs by Worker Race. The majority (93%) of workers in the study area reported their race as White.

Table 23- Jobs by Worker Race in the Applegate Valley, 2021

	Count	Percentage
White	2433	93%
Black or African American	35	1%
American Indian or Alaska Native	33	1%
Asian	45	2%
Native Hawaiian or Other Pacific Islander	3	0.1%
Two or More Race Groups	77	3%

Jobs by Worker Ethnicity. About 9% of workers identified their ethnicity as Hispanic or Latino origin.

Table 24 - Jobs by Worker Ethnicity in the Applegate Valley, 2021

	Count	Percentage
Not Hispanic or Latino	2382	91%
Hispanic or Latino	244	9%

Jobs by Educational Attainment. Approximately half of the workforce in the study area have a high school degree or some college.

Table 25 - Jobs by Educational Attainment in the Applegate Valley, 2021

	Count	Percentage
Less than High School	262	10%
High School Equivalent, no college	633	24%
Some College or Associate’s Degree	681	26%
Bachelor's Degree or Advanced Degree	476	18%
Data not Available (workers aged 29 or younger)	571	22%

Jobs, by Earnings and Industry

The following tables provide a breakdown of jobs by amount earned and jobs by sector. Industry categories are determined by the North American Industry Classification System (NAICS) and referred to as NAICS codes. This standard is used by federal statistical agencies to classify business establishments. The following data was reported by two-digit NAICS codes, which are the broadest code for aggregating industry types. The NAICS code system includes 2 – 6-digit numbers. See Appendix X. for a more detailed breakdown.

Jobs by Earning. Nearly 60% of the workforce earns \$3,333/month or less. Approximately 23% of the workforce earns \$1,250/month or less. Note that this dataset reflects earning by job and not by individual; individuals may have one or multiple jobs. This dataset also does not reflect full-time equivalency, hourly work, or salaried positions.

Table 26 - Jobs by Worker Earning in the Applegate Valley, 2021

	Count	Percentage
\$1,250/month or less	615	23%
\$1,251 to \$3,333/month	950	36%
More than \$3,333/month	1061	40%

Jobs by Sector. By share of jobs, the top industry in the study area is agriculture, forestry, fishing and hunting, followed by educational services, construction, and manufacturing.

Table 27 - Jobs by Sector in the Applegate Valley, 2021

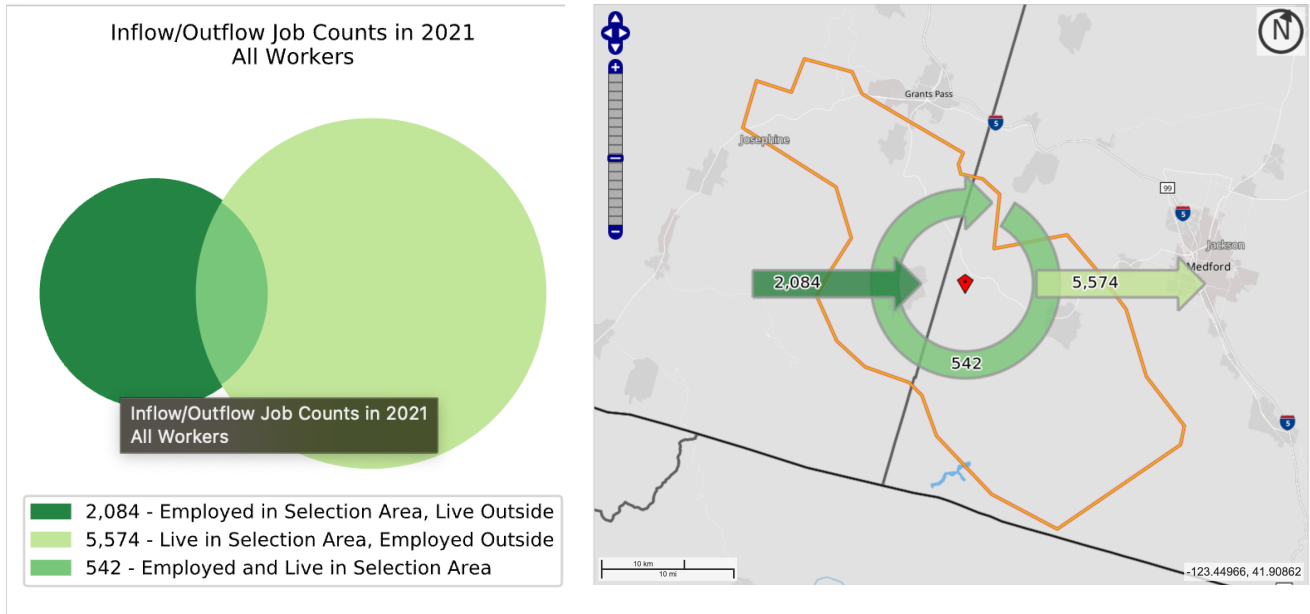
		Count	Percentage
1	Agriculture, Forestry, Fishing and Hunting	485	18%
2	Educational Services	406	15%
3	Construction	324	12%
4	Manufacturing	290	11%
5	Accommodation and Food Services	200	8%
6	Retail Trade	183	7%
7	Professional, Scientific, and Technical Services	144	5%
8	Administration & Support, Waste Management and Remediation	106	4%
9	Other Services (excluding Public Admin)	97	4%
10	Finance and Insurance	89	3%
11	Health Care and Social Assistance	72	3%
12	Wholesale Trade	64	2%
13	Information	42	2%
14	Real Estate and Rental and Leasing	36	1%
15	Public Administration	32	1%
16	Transportation and Warehousing	27	1%
17	Arts, Entertainment, and Recreation	26	1%
18	Management of Companies and Enterprises	2	0%
19	Mining, Quarrying, and Oil and Gas Extraction	1	0%
20	Utilities	0	0%
	Total	2626	100%

Workforce Inflow/Outflow

The following tables and graphics detail the flow of workers in and out of the study area representing the Applegate Valley. Only 20% of the Applegate Valley workforce both lives and works within the Applegate Valley; Approximately 80% of the workforce commutes from areas outside of the Applegate.

There is not a significant trend in the flow of workers in or out of the study area based on age or earnings. There are some variations in worker flow based on industry class. For example, there are **more workers flowing into the valley for jobs within the goods producing industry class**, than are flowing out. This aligns with the 2021 table for jobs by industry showing some of the top industries being agricultural, forestry, fishing, and hunting, construction, and manufacturing.

Figure 7 - Workforce Inflow/Outflow in the Applegate Valley, 2021



There are more workers commuting outside of the valley for jobs in trade, transportation, and utilities as well as other services (ex. repair and maintenance, religious, grantmaking, civic, or professional organizations, personal care, pet care, laundry service, etc.).

Table 28 - Inflow by Worker Income, Age, and Sector in the Applegate Valley, 2021

	Inflow, by count	Inflow, by %	Outflow, by count	Outflow, by %
# of Jobs Filled by Workers	2084	100%	5574	100%
Age 29 or Younger	479	23%	1093	20%
Age 30 to 54	1118	54%	2733	49%
Age 55 or Older	487	23%	1748	31%
\$1,250/month or less	456	22%	1057	19%
\$1,251 to \$3,333/month	754	36%	2027	36%
More than \$3,333/month	874	42%	2490	45%
Workers in "Goods Producing" Industry Class	862	41%	1044	19%
Workers in "Trade, Transportation, Utilities" Industry Class	203	10%	1200	22%
Workers in "Other Services" Industry Class	1019	49%	3330	60%

Most workers travelling from their home to work, travelled to the north, the northeast, or easternly to urban centers such as Grants Pass or Medford, as shown by Figure 8.

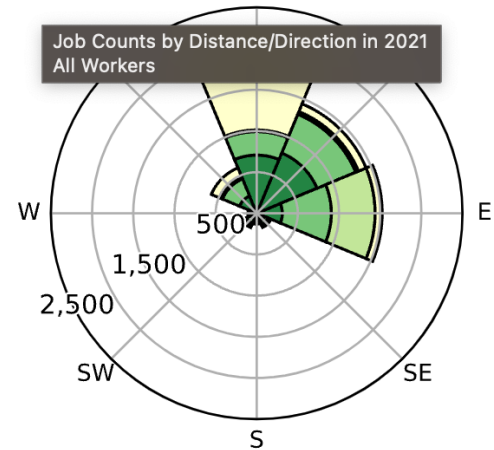
Nearly 38% of workers commuting travelled less than 10 miles. Figure 9 shows a breakdown of distance travelled from home census block to work census block.

Figure 8 - Number of Jobs by Distance Travelled by Workers who Live in the Applegate Valley, 2021

Figure 9 - Jobs by Distance Travelled Between Home and Work for Workers in the Applegate Valley, 2021

Jobs by Distance - Home Census Block to Work Census Block		
2021		
	Count	Share
Total All Jobs	6,116	100.0%
Less than 10 miles	2,317	37.9%
10 to 24 miles	1,785	29.2%
25 to 50 miles	667	10.9%
Greater than 50 miles	1,347	22.0%

Job Counts by Distance/Direction in 2021 All Workers



2014 – 2021 Change in Jobs

By Earnings

The following table shows change in earnings by total jobs in the study area between 2014 and 2021. **There are approximately 945 more jobs in 2021 than there was in 2014.** This growth outpaces overall population growth in the valley. Overall, workers with jobs inside the study area are earning more monthly than they did seven years ago.

Table 29 - Jobs by Earnings in the Applegate Valley, 2014 - 2021

#	2014		2018		2021	
	Count	% total	Count	% total	Count	% total
\$1,250/month or less	568	34%	719	29%	615	23%
\$1,251 to \$3,333/month	744	44%	1041	42%	950	36%
More than \$3,333/month	369	22%	739	30%	1061	40%
(Total Jobs)	1681		2499		2626	

By Industry

Table 29 shows a change in jobs by industry from 2014 – 2021. The top fastest growing industries (percent change over 100% for industries with more than 20 total jobs) since 2014 have been:

1. Agricultural, Forestry, Fishing, and Hunting (185%)
2. Finance and Insurance (154%)
3. Professional, Scientific, and Technical Services (148%)
4. Construction (130%)
5. Public Administration (129%)
6. Accommodation and Food Services (125%)

The top industries by number of jobs added between 2014 and 2021 are:

1. Agricultural, Forestry, Fishing, and Hunting (315)
2. Construction (183)
3. Accommodation and Food Services (111)
4. Manufacturing (103)
5. Professional, Scientific, and Technical Services (86)
6. Retail Trade (77)

Table 30 - Change in Jobs by Industry in the Applegate Valley, 2014 - 2021

	2014	2018	2021	Change # Jobs	% Change Jobs
Agriculture, Forestry, Fishing and Hunting	170	372	485	315	185%
Mining, Quarrying, and Oil and Gas Extraction	0	1	1	1	-
Utilities	2	1	0	-2	-
Construction	141	264	324	183	130%
Manufacturing	187	286	290	103	55%
Wholesale Trade	45	47	64	19	42%
Retail Trade	106	169	183	77	73%
Transportation and Warehousing	21	19	27	6	29%
Information	28	41	42	14	50%
Finance and Insurance	35	37	89	54	154%
Real Estate and Rental and Leasing	40	37	36	-4	-10%
Professional, Scientific, and Technical Services	58	91	144	86	148%
Management of Companies and Enterprises	3	3	2	-1	-
Administration & Support, Waste Management and Remediation	76	118	106	30	39%
Educational Services	416	457	406	-10	-2%
Health Care and Social Assistance	60	38	72	12	20%
Arts, Entertainment, and Recreation	32	35	26	-6	-19%
Accommodation and Food Services	89	261	200	111	125%
Other Services (excluding Public Admin)	158	203	97	-61	-39%
Public Administration	14	19	32	18	129%
Total	1681	2499	2626	945	56%

Industries that lost jobs from 2014 – 2021 were (1) Other Services (-61); and (2) Educational Services (-10). Other industries lost ten or fewer jobs and represent smaller sectors in the Applegate Valley to begin with.

Changes by Inflow/Outflow

The following table details changes in worker flow by job count since 2014. Overall, flow in and out of the Applegate Valley has been very consistent.

Table 31 - Change in Worker Flow by Count of Jobs in the Applegate Valley, 2014 -2021

In-area labor force efficiency	2014		2018		2021	
	Count	%	Count	%	Count	%
Workforce living in the selection area	5629		6147		6116	
Living and employed in the selection area	433	8%	518	8%	542	9%
Living in the selection area, but employed outside	5196	92%	5629	92%	5574	91%

Applegate Valley Location Quotient

The following table shows the location quotient of data available for the Applegate Valley in comparison to the Rogue Valley overall. Some industries have been omitted from both data sets to account for differences in industry labels. Industries likely to be supporting general economic activity across the Applegate Valley include agriculture, forestry, fishing and hunting, educational services, construction, and professional, scientific, and technical services.

Table 32 - Location Quotient for Applegate Valley Industries in Comparison to Employment Levels for Rogue Valley, 2021, 2023

Industry Sector	LQ
Accommodation and Food Services	0.62
Administration & Support, Waste Management and Remediation	0.85
Agriculture, Forestry, Fishing and Hunting	9.79
Arts, Entertainment, and Recreation	0.57
Construction	1.99
Educational Services	11.29
Finance and Insurance	1.10
Health Care and Social Assistance	0.13
Information	0.93
Management of Companies and Enterprises	0.03
Manufacturing	1.22
Mining, Quarrying, and Oil and Gas Extraction	0.32
Other Services (excluding Public Admin)	1.01
Professional, Scientific, and Technical Services	1.56
Real Estate and Rental and Leasing	0.79
Retail Trade	0.41
Transportation and Warehousing	0.25
Utilities	0.00
Wholesale Trade	0.82

Applegate Valley Business Establishments

The following data set represents County Business Pattern data for the ZIP codes 97527 (Grants Pass), 97543 (Wilderville), 97544 (Williams), and 97530 (Jacksonville). The place names associated with each ZIP code refer to locations of post offices and the areas they serve and do not necessarily correspond to municipal boundaries. For example, 97527 (Grants Pass) is one of three ZIP codes that serve the greater Grants Pass area and largely includes the rural area surrounding the city.

Figure 10 shows the ZIP code boundaries representing the following data. Note that these do not perfectly align with the working boundary used for the Applegate Valley data retrieved through the Census OnTheMap Tool. ZIP codes 97527 (Grants Pass) and 97530 (Jacksonville) also cross county boundaries.

Figure 10 - Applegate Valley ZIP Code Boundaries

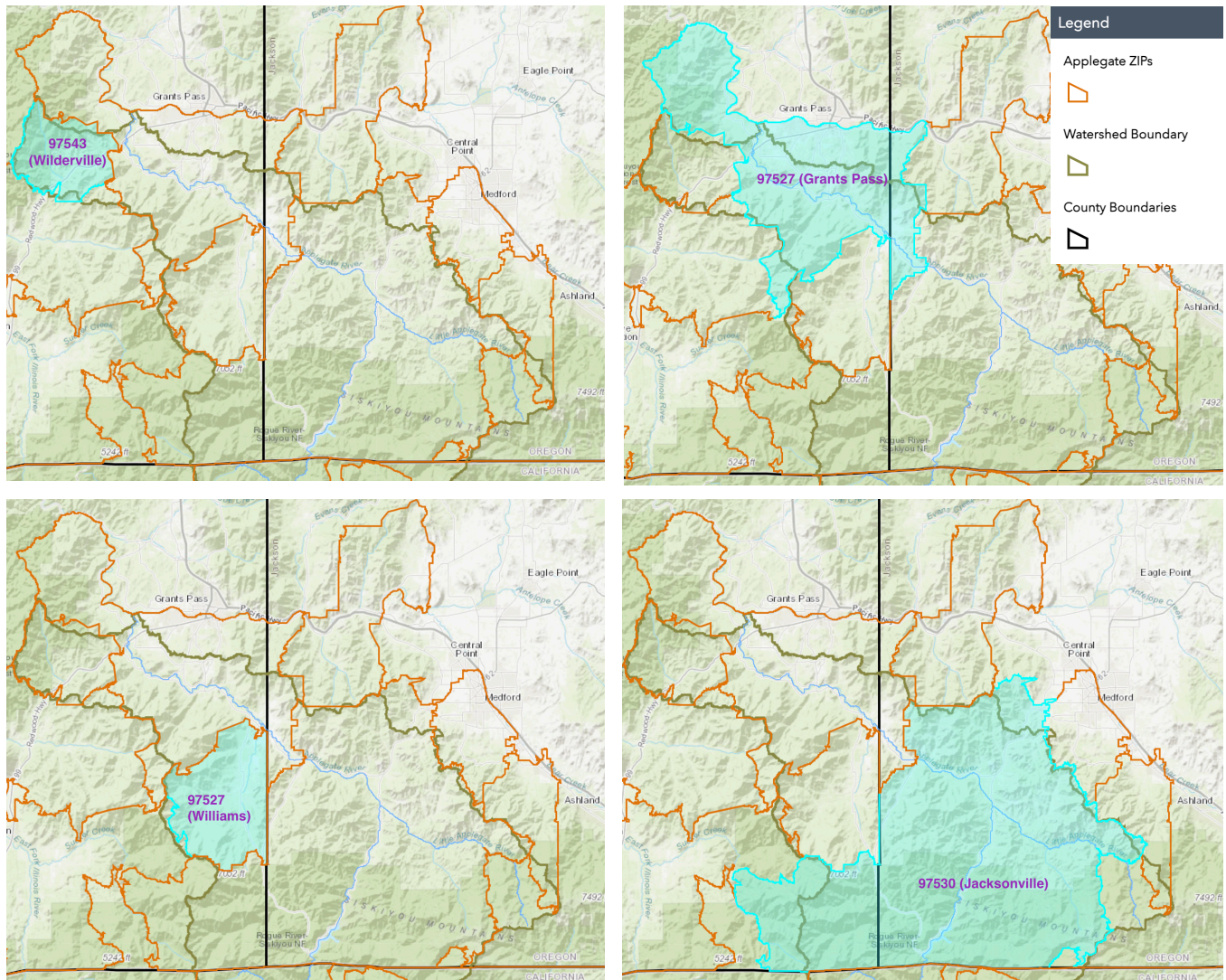


Table 32 gives details number of businesses, the number of employees, and average annual employee wage in the Applegate Valley by ZIP codes. Overall, the Applegate Valley has an estimated total of 947 business establishments, 8,101 employees, and an average annual employee wage of \$48,672. It is likely that population density in and around the Cities of Grants Pass and Jacksonville included within the ZIP code boundaries account for the difference of nearly 2,000 employees in comparison to the Census OnTheMap tool for the Applegate Valley.

Table 33 - 2022 Business Establishment Data for all Applegate Valley ZIP codes

All Zip Codes (97544, 97530, 97527)			
Total for All Sectors	Number of Establishments	Number of Employees	Average Annual Employee Wage
ZIP 97527 (Grants Pass, OR)	663	6,486	\$50,523
ZIP 97543 (Wilderville, OR)	8	161	\$49,385
ZIP 97544 (Williams, OR)	37	341	\$44,358
ZIP 97530 (Jacksonville, OR)	239	1,113	\$39,104
Total	947	8101	
Average			\$48,672
Source: 2022 County Business Patterns, US Census, Table CB2200CBP by ZIP code			

Table 33 shows that the top industries by number of business establishments for the aggregate of Applegate Valley ZIP codes where data was available. Approximately 3% of businesses counted as part of “all establishments” did not have industry specific data available and are noted by dashed lines in Table 33 and summed as “NAICS Code unavailable”.

The top five industries for this geography by number of businesses are:

1. Construction
2. Health Care and social assistance
3. Retail Trade
4. Professional, scientific, and technical services
5. Accommodation and food services

Table 34 - Top Industries in the Applegate Valley by Number of Business Establishments, 2022

NAICS CODE	Sector	97527 Gnts	97543 Wildrv	97544 William s	97530 Jckson	Total #	% of total*
00	All Establishments	663	8	37	239	947	100%
23	Construction	130	3	6	29	168	18%
62	Health care and social assistance	102	-	-	16	118	12%
44-45	Retail trade	84	-	5	15	104	11%
54	Professional, scientific, and technical services	51	-	4	38	93	10%
72	Accommodation and food services	58	-	-	25	83	9%
81	Other services (except public administration)	51	-	4	15	70	7%
53	Real estate and rental and leasing	39	-	-	20	59	6%
56	Administrative and support and waste management and remediation services	35	-	5	13	53	6%
31-33	Manufacturing	29	-	3	10	42	4%
52	Finance and insurance	19	-	-	13	32	3%
42	Wholesale trade	8	-	-	15	23	2%
48-49	Transportation and warehousing	18	-	-	-	18	2%
11	Agriculture, forestry, fishing and hunting	12	-	-	5	17	2%
51	Information	9	-	-	7	16	2%
71	Arts, entertainment, and recreation	8	-	-	4	12	1%
61	Educational services	5	-	-	-	5	1%
22	Utilities	3	-	-	-	3	0%
	(NAICS Code unavailable)	2	5	10	14	31	3%

Source: 2022 County Business Patterns, US Census, Table CB2200CBP by ZIP code

The following table shows a breakdown of 2022 business establishments by number of employees. Approximately 80% of business establishments have nine or fewer employees; **Sixty-two percent of business establishments have four or fewer employees.**

Table 35 - 2022 Business Establishments in Applegate Valley ZIP Codes by Number of Employees

	Number of Employees						Total
	Less than 5	5 to 9	10 to 19	20 to 49	50 to 99	100 to 250	
97527 (Grants Pass)	388	122	89	45	15	3	663
97543 (Wilderville)	5						8
97544 (Williams)	24	6	4				37
97530 (Jacksonville)	171	42	15	9			239
Total	588	170	108	54	15	3	947
Percent of Total	62%	18%	11%	6%	2%	0%	

In contrast to the top industries by count of job, business establishment data shows that there may be fewer businesses with more employees in industries such as agriculture, forestry, fishing, and hunting and educational services as reported from the US Census OnTheMap tool for the Applegate Valley study area.

Summary & Discussion

The following sections summarize the key take-aways from both regional and local economic trends for the Applegate Valley. This section will conclude with recommendations for future discussion and future research.

Rogue Valley Regional Economic Trends

In summary, the top industries by percent of jobs in the Rogue Valley (Jackson and Josephine County) are:

- Healthcare and social assistance;
- Retail trade;
- Government;
- Leisure and hospitality; and
- Manufacturing.

Both healthcare and social assistance and leisure and hospitality are projected to grow, adding an estimated 5,210 jobs to the regional economy by 2033. Occupations in healthcare and social assistance are typically higher wage jobs, with most occupations requiring post-secondary levels of education or higher for entry-level positions. Jobs in leisure and hospitality, particularly for accommodation and food services are projected to grow but are typically lower wage jobs with an average annual wage of ~27K. However, average annual wages for occupations related to passenger transportation (~61K) and performing arts and spectator sports (~76K) are higher than other occupations within the sector.

Retail trade represents a diversity of service-providing sub-sectors such as the sale of building materials, motor vehicles, food and beverage stores, electronics, furniture, healthcare retailers, gas stations, clothing, sports goods, and bookstores, amongst others. Store retailers include those selling retail in a physical location, selling products through methods such as TV commercials, catalogues, vending in temporary markets or pop-ups, amongst others, and ecommerce activities. Ecommerce has had a significant impact on the growth of the retail trade sector in the last two decades across the US broadly, creating demand for building regional fulfillment centers. However, one study from the National Bureau of Economic Analysis has claimed that ecommerce fulfillment centers reduce retail employment growth in the surrounding area by nearly 1,000 jobs per quarter.¹⁸ The same study has also reported that the opening of an ecommerce fulfillment center also coincides with a 3% increase in the annual likelihood of a brick-and-mortar retailer closing. The same study also shows that jobs lost to

¹⁸ Page, Lucy E. (2022) The Effect of E-Commerce Expansion on Local Retail. Summary of Working Paper 30077. The Digest. Retrieved from <https://www.nber.org/digest/202208/effect-e-commerce-expansion-local-retail>

competition with ecommerce are only partially off-set by increased jobs in transportation and warehousing.

The following industries have comparative concentrations of employment for the Rogue Valley in comparison to both state and national-level employment:

4. Agriculture, forestry, fishing, and hunting,
5. Retail trade, and
6. Healthcare and social assistance

Location quotients for these industries identify them as regionally significant (>1.25) in generating economic activity across both basic and non-basic sectors for the Rogue Valley, even despite trends projecting declines in job growth and historic data reporting decreased income across both the agriculture and timber industries.

Agriculture and agriculture-related occupations accounted for approximately 2% of total employment in the Rogue Valley in 2022. In 2022, farm earnings and net income generated through agricultural activity, including corporate farms, totaled \$8.4 M in Jackson County, which represents a 79% decrease since the 1970s. In Josephine County, farm earnings and net income has decreased by 91% in the same period, totaling \$1M in 2022.

Timber and timber-related occupations accounted for 4.8% of total employment in Jackson County and 2.8% of total employment in Josephine County in 2023. Just over half (51%) of timber jobs in the Rogue Valley are related to growing and harvesting timber. While fewer in total number of available jobs, timber-related occupations have wages above the area median income (~67.5K) and require fewer educational requirements (high school or equivalent) for both entry-level and advanced positions.

Applegate Valley Local Economic Trends

There are approximately 2,626 jobs in study area for the Applegate Valley, with employment concentrated around Williams, Murphy, and Provolt. Most of the workforce (53%) is between the ages of 30 and 54. Nearly a quarter of the workforce is 55 or older. Both near-term and long-term strategies should consider potential strain on available and trained workforce once older individuals begin to retire. Approximately half of workforce (50%) has a high school equivalent or some post-secondary training. Eighteen percent of working individuals have a bachelor's degree or higher.

By count of total jobs in 2021, the top industries in the Applegate Valley were:

- **Agriculture, forestry, fishing and hunting** – total jobs: 485; 18% of all jobs.
- **Educational services** – total jobs: 406; 15% of all jobs.
- **Construction** – total jobs: 324; 12% of all jobs.
- **Manufacturing** – total jobs: 290; 11% of all jobs
- **Accommodation and Food Services** – total jobs: 200; 8% of all jobs

According to data available from the US Census OnTheMap tool, only 20% of the workforce lives and works in the Applegate Valley. Nearly 80% of workers commute from outside the Applegate Valley. Approximately 5,574 individuals who live in the Applegate Valley commute outside of the valley for work, most often to urban centers such as Grants Pass and Medford. Sixty percent of Individuals who live in the Applegate Valley and commute out of the valley are workers in “other services” than trade, transportation, or utilities. Other services may include jobs in finance and insurance, professional, scientific, and technical services, accommodation and food services, repair and maintenance services, and public administration, amongst others. The pattern of flow in and out of the Applegate Valley by workers has been fairly consistent since 2014.

Jobs within the Applegate Valley has increased by 945 jobs since 2014, with some industries growing more rapidly, as shown by percent growth of jobs between 2014 and 2021. The top five industries who have added the most jobs since 2014 include:

- **Agricultural, Forestry, Fishing, and Hunting** – jobs added: 315; percent growth: 185%
- **Construction** - jobs added: 183; percent growth: 130%
- **Accommodation and Food Service** - jobs added: 111; percent growth: 125%.
- **Manufacturing**- jobs added: 103; percent growth: 55%
- **Professional, Scientific, and Technical Services** – jobs added: 86; percent growth: 148%
- **Retail Trade** – jobs added: 77; percent growth: 73%

There has also been local growth in industries such as finance and insurance (154%) and public administration (129%). Public administration added a small number of jobs in total since 2014 (18) but more than doubled between 2014 and 2021.

2022 County Business Patterns report the number of business establishments and business size for ZIP codes that overlap with the Applegate Valley study area. Note that these boundaries do not perfectly align, and placenames associated with the ZIP code refer to postal service areas and not necessarily community boundaries. The top five industries by number of business establishment in 2022 include:

- **Construction** – # of businesses: 168, 18% of total businesses
- **Healthcare and social assistance** - # of businesses: 118; 12% of total businesses
- **Retail Trade** - # of businesses:104; 11% of total businesses
- **Professional, scientific, and technical services** - # of businesses: 93: 10% of total businesses
- **Accommodation and food services** - # of businesses: 83; 9% of total businesses

Approximately 80% of total business establishments in the Applegate Valley ZIP codes have nine or fewer employees and 62% have less than five employees. The business establishment data also suggests that there are fewer businesses in agriculture, forestry, fishing, and hunting and educational services, but that they employ larger workforces.

The percent of the local workforce engaged in agriculture, forestry, fishing and hunting is higher relative to jobs available in the Rogue Valley and represents a local concentration of these activities, as shown by location quotients in Table 30. Other industries with a location quotient

higher than 1.25 included: educational services, construction, professional, scientific, technical services. It is likely that these industries support economic activities across all sectors. However, other industries with lower location quotients may also suggest where there are opportunities for business development and local entrepreneurship, especially those with positive regional trends such as retail trade and accommodation and food services.

The following table compares across different data sets for how the top industries in the Applegate Valley are ranked from highest to lowest using numbers 1-10.

Table 36 - Top 10 Industries in the Applegate Valley Summary

rank	# of jobs in 2021	Industry growth (%) 2014-2021*	Jobs added (#) 2014-2021	2022 (#) Business establishments**
1	Agriculture, Forestry, Fishing and Hunting (485)	Agriculture, Forestry, Fishing and Hunting (185%)	Agriculture, Forestry, Fishing and Hunting (+315)	Construction (168)
2	Educational Services (406)	Finance and Insurance (154%)	Construction (+183)	Health care and social assistance (118)
3	Construction (324)	Professional, Scientific, and Technical Services (148%)	Accommodation and Food Services (+111)	Retail Trade (104)
4	Manufacturing (290)	Construction (130%)	Manufacturing (+103)	Professional, Scientific, and Technical Services (93)
5	Accommodation and Food Services (200)	Public Administration (129%)	Professional, Scientific, and Technical Services (+86)	Accommodation and Food Services (83)
6	Retail Trade (183)	Accommodation and Food Services (125%)	Retail Trade (+77)	Other Services (except Public Admin) (70)
7	Professional, Scientific, and Technical Services (144)	Retail Trade (73%)	Finance and Insurance (+54)	Real estate and rental and leasing (59)
8	Administration & Support, Waste Management and Remediation (106)	Manufacturing (55%)	Administration & Support, Waste Management and Remediation (+30)	Administration & Support, Waste Management and Remediation (53)
9	Other Services (except Public Admin) (97)	Information (50%)	Wholesale Trade (+19)	Manufacturing (42)
10	Finance and Insurance (89)	Wholesale trade (42%)	Public Administration (+18)	Finance and Insurance (32)

*Reported for industries with more than 15 total jobs. **Boundaries for business establishment data are by ZIP code and differ from the exact geography used to aggregate employment and industry growth data.

Future Discussion

Our project team recommends the following prompts for further community discussion related to the results of this economic study:

- What strategies can be used to support top industries in the Applegate Valley in ways that align with the community’s environmental and economic goals?
- What types of innovations, access to capital, or other resources would businesses or workers in these industries require to build on the Applegate Valley’s unique strengths and meet the goals of the community vision, such as resilience, sustainability, and economic vitality?
- What opportunities are there to make connections across the region that amplify and maintain the uniqueness and strengths of the Applegate Valley and benefit from resources available in regional urban centers?
- What types of business support or training do current or future businesses need and want that can align with positive regional trends such as the increase in retail trade and accommodation and food services?

Further Research

Agriculture, forestry, fishing and hunting is a regionally and locally significant industry for the Applegate Valley. This industry employs the largest share of workers and has seen recent growth (2014 - 2021) despite trends of decline in the Rogue Valley. Additionally, this industry sector has historic and culturally significant ties to the region. However, most of this data available at the geography for the Applegate Valley is aggregated. Future research may focus on a study designed to more specifically detail the conditions of sub-sectors such as agriculture and forestry.

Further research may also seek to describe the perspectives and opinions of workers in the Applegate Valley. With over 5,500 individuals travelling outside of the Applegate Valley for work, there may be opportunities for leveraging an existing (and skilled) workforce through creating similar job opportunities or entrepreneurial activity locally.

Lastly, while total job counts and industry growth in the Applegate Valley are lower than the Rogue Valley as a whole, strategies that support retail trade and accommodation and food services may be opportunities to leverage positive regional trends that point to growth in these sectors. Specific strategies aimed at these industry sectors may also align with local entrepreneurship and business creation.

Appendix A. Detailed Methodology

This report draws on economic data for the Applegate Valley available from existing resources at the federal, state, regional, county, and local scale. We acknowledge that available and accurate economic data for a rural and unincorporated area, such as the Applegate Valley, is an on-going challenge and have sought, when possible, to draw from multiple resources to define localized economic conditions. It is important to note that available datasets may vary by year and by geography and is specified throughout the discussion.

The following describes data that this study utilized and, when relevant, the methods we used to interpret it.

Rural Development Initiative (RDI) Updated Applegate Valley Profile. Partners from RDI provided a demographic profile for A Greater Applegate during the planning process of the 2022 Applegate Valley Vision. RDI subscribes to an ESRI service that aggregates and reports data available from the US Census. ESRI subscription users can pull Census data for available boundaries, such as cities or counties, as well as draw organic boundaries, such as an unincorporated community boundary. This service operates similarly to the Census On the Map webtool by aggregating data from census block groups that intersect or fall within the study boundary provided.

This ESRI service also provides population projections based on available data. RDI provided an updated Applegate Valley Demographic Profile for the purposes of this report. Note that any discrepancies between the Applegate Valley Community Demographics in this report and the 2022 Applegate Valley Vision is due to updates in available data which may have shifted projections. The boundary drawn for the original data report is the same boundary used for this report. See Appendix A. for the updated raw data report.

2022 American Community Survey (ACS) 5-year Estimates. The American Community Survey (ACS) is an annual survey facilitated by the US Census that collects detailed socioeconomic data available at multiple levels of geography. The ACS has largely replaced the decennial census long form which was used through the 1990s. ACS 5-year estimates aggregate annual data from the year reported and the four previous years. For example, 2022 5-year estimates include annual data reported in 2018 – 2022. The 2022 ACS 5-year estimates report demographic and economic data reported for Jackson and Josephine County as described in the [Applegate Valley Background](#) and [Rogue Valley Economic Context](#).

Headwaters Economics' Economic Profile System (EPS). Headwaters Economics provides a free online tool that builds tailored socioeconomic reports at the national, state, regional, and county-level. The reports generated by EPS can be used to compare or aggregate across different geographies. The EPS tool utilizes published data from federal agencies such as the US

Census Bureau, the Bureau of Economic Analysis, and the Bureau of Labor Statistics. When relevant, the EPS system aggregates other published available sources such as from the Bureau of Land Management, the Forest Service, or the US Department of Agriculture, amongst others. This report utilizes data reported by EPS to describe county and industry trends in Jackson and Josephine County within the section [Rogue Valley Economic Context](#). The following sources were accessed through EPS:

2022 Regional Economic Accounts from the Bureau of Economic Analysis (BEA) provide economic statistics at the county-level that describe the distribution of economic activity and growth in the US. The original source of this data can be verified at <http://www.bea.gov/regional>.

2023 Quarterly Census of Employment and Wages (CEW) from the Bureau of Labor Statistics publishes a quarterly count of employment and wages as reported by employers. CEW data covers approximately 95% of jobs nationally and is reported by industry at the national, state, county, Metropolitan Statistical Area (MSA) geographies. The original source of this data can be verified at <http://www.bls.gov/cew/>.

2021 Nonemployer Statistics from the US Census Bureau reports data annually by industry for US businesses for no paid employees and which are subject to federal income tax. The majority of nonemployers are self-employed individuals operating a sole proprietorship, also referred to as an unincorporated business, which may or may not be the source of the individual's primary income. While most business establishments in the US are nonemployers, these businesses account for less than 4% of sales and receipts across the US and are typically excluded from other US Census business statistics. The original source of this data can be verified at <http://www.census.gov/programs-surveys/nonemployer-statistics.html>.

Local Area Unemployment Statistics (LAUS) from the Bureau of Labor Statistics under the US Department of Labor publishes monthly and annual reports on employment, unemployment, and labor force data for US Census Regions. The original source of this data can be verified at <http://www.bls.gov/lau/>.

2022 Census of Agriculture from the National Agricultural Statistics Service under the US Department of Agriculture reports a complete count of US farms and ranches, including the individuals who operate them. The Census of Agriculture is taken every five years and includes both rural and urban farms that produce, or would typically produce, \$1K of agricultural products raised or sold. The original source of this data can be verified at <http://www.nass.usda.gov/AgCensus>

2023 State of Oregon Employment Department (OED) Industry Employment Projections are published annually and compiled by the OED Workforce and Economic Research Division to project industry employment trends across the state of Oregon and its regions. This data set details 2023 industry employment and projects through 2033. This data set is described in [Rogue Valley Industry Employment Projections](#). The original source of this data can be found at <https://qualityinfo.org/web/guest/data>.

US Census OnTheMap is a free online tool and reporting application hosted by the US Census Bureau and utilizes Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES). OnTheMap reports LODES data on where workers are employed and where they live, as well as companion reports on age, earnings, industry distributions, race/ethnicity, educational attainment, and sex. Employment data used in this webtool also derive from Unemployment Insurance (UI) Wage Records reported by employers and maintained at the state level, data on federal employees and jobs from the Office of Personnel Management, and the QCEW from the Bureau of Labor Statistics. Age, earnings, and industry profiles aggregated by this tool may also be supplemented with other US Census data.

The OnTheMap tool allows web-users to use existing municipal boundaries, import geographies from KML, shapefile, or GPS, or use drawing tools to create geographies in which to generate reports. OnTheMap uses 2020 census block groups as the base geography for aggregating data. For drawn boundaries, the tool aggregates Census block groups that intersect or are within the boundary.

The working boundary used in the OnTheMap tool was based off the American Viticultural Area (AVA) boundary for the Applegate Valley. AVA boundaries, described and regulated at the federal level, are used for delimiting grape-growing regions with shared geographic and climatic features. As such, the Applegate Valley AVA boundary also closely resembles the watershed boundary. The AVA shapefile was edited within the OnTheMap tool to more closely match the geographic area used in 2022 Applegate Valley Vision, which extended the southeast edge of boundary to include populated areas north of Applegate Lake.

Data compiled by the OnTheMap tool is discussed within the [Applegate Valley Economic Profile](#), with some additions from County Business Pattern data available by ZIP Code.

2022 County Business Patterns, provides annual statistics for businesses detailed by industry at the county and ZIP code level. This data set includes available information for number of establishments, employment, first quarter payroll, and average employee wage. County Business Patterns extracts data from the Business Register, which is a database of all known businesses maintained and updated by the US Census Bureau. County Business Patterns are typically available 18 months after each reference year, with data available at the ZIP Code level published shortly afterwards. The original source of this data can be found at <http://www.census.gov/programs-sureys/cbp.html>.

Appendix B.

The following NAICS codes are based off 2022 NAICS updates, except for Public Administration which is not included in the economic census. The economic census does not cover government-owned establishments, instead these are accounting for under Census of Government. The 2012 NAICS codes for Public Administration have been included to provide a sense what falls under this category.

Goods-Producing Industries

NAICS #	Sector	Sub-Sectors
11	Agriculture, Forestry, Fishing and Hunting	<ul style="list-style-type: none"> • Crop Production (111) • Animal Production (112) • Forestry and Logging (113) • Fishing, Hunting, and Trapping (114) • Support Activities for Agriculture and Forestry (115)
23	Construction	<ul style="list-style-type: none"> • Construction of Buildings (236) • Heavy and Civil Engineering Construction (237) • Specialty Trade Construction (238)
31 – 33	Manufacturing	<ul style="list-style-type: none"> • Food Manufacturing (311) – <i>includes animal products, grain milling, sugar, fruit and vegetable preserving, dairy products, animal processing, bread and bakeries, snacks, coffee, tea, spices, and others.</i> • Beverage and Tobacco Product Manufacturing (312) – <i>includes wineries, breweries, and distilleries</i> • Textile Mills (313) – <i>includes fiber, yarn, fabrics</i> • Apparel Manufacturing (315) • Wood Product Manufacturing (321) • Paper Manufacturing (322) • Printing and Related Support Activities (323) • Petroleum and Coal Products Manufacturing (324) • Chemical Manufacturing (325) – <i>includes petrochemicals, pigments, plastics, fertilizers, and medicinal/botanical manufacturing, and others</i> • Plastics and Rubber Product Manufacturing (326) • Nonmetallic Mineral Product Manufacturing (327) – <i>includes pottery, ceramics, blown glass, cement, lime and other products</i> • Primary Metal Manufacturing (331) • Fabricated Metal Product Manufacturing (332) • Machinery Manufacturing (333)

		<ul style="list-style-type: none"> • Computer and Electronic Product Manufacturing (334) • Electrical Equipment, Appliance, and Component Manufacturing (335) • Transportation Equipment Manufacturing (336) • Furniture and Related Product Manufacturing (337) • Miscellaneous Manufacturing (339) – <i>includes medical supplies, jewelry, sports equipment, toys, office supplies, musical instruments, and others</i>
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Service-Providing Industries

NAICS #	Sector	Sub-Sectors
42	Wholesale Trade	<ul style="list-style-type: none"> • Merchant Wholesalers, Durable Goods (423) • Merchant Wholesalers, Nondurable Goods (424) • Wholesale Electronic Markets and Agents and Brokers (425)
44-45	Retail Trade	<ul style="list-style-type: none"> • Motor Vehicle and Parts Dealers (441) • Building Material and Garden Equipment and Supplies Dealers (444) • Food and Beverage Stores (445) – <i>includes groceries, convenience stores, fruit and vegetable retailers, meat retailers, bakeries, beer and wine retailers, and others</i> • Furniture, Home Furnishings, Electronics, and Appliance Retailers (449) • General Merchandise Retailers (455) • Health Care and Personal Care Retailers (456) – <i>includes pharmacy retailers, beauty supplies, and others</i> • Gasoline Stations and Fuel Dealers (457) • Clothing, Clothing Accessories, Shoe, and Jewelry Retailers (458) • Sporting Goods, Hobby, Musical Instruments, Book, and Miscellaneous Retailers (459) – <i>includes florists, office supplies, gifts, novelty, or souvenir retailers, used merchandise, pet supplies, art dealers, manufactured (mobile) home dealers, e-cigarette retailers, and others.</i>
52	Finance and Insurance	<ul style="list-style-type: none"> • Monetary Authorities - Central Bank (521) • Credit Intermediation and Related Activities (522) • Securities, Commodity Contracts, and Other Financial Investments and Related Activities (523) • Insurance Carriers and Related Activities (524) • Funds, Trusts, and Other Financial Vehicles (525)
54	Professional, Scientific, and Technical Services	<ul style="list-style-type: none"> • Professional, Scientific, and Technical Services (541) – <i>includes lawyers, notaries, accounting, architectural or</i>

		engineering services, surveying or mapping services, lab testing, graphic design, computer systems, marketing services, environmental consulting services, scientific research, advertising, photography, veterinary services, interpretation or translation, and others.
72	Accommodation and Food Services	<ul style="list-style-type: none"> • Accommodation (721) • Food and Drinking Places (722)
81	Other Services (except Public Administration)	<ul style="list-style-type: none"> • Repair and Maintenance (811) • Personal and Laundry Services (812) • Religious, Grantmaking, Civic, Professional, and Similar Organizations (813) – includes nonprofit organizations
92	Public Administration	<ul style="list-style-type: none"> • Executive, Legislative, and Other General Government Support (921) • Justice, Public Order, and Safety Activities (922) • Administration of Human Resource Programs (923) • Administration of Environmental Quality Programs (924) • Administration of Housing Programs, Urban Planning, and Community Development (925) • Administration of Economic Programs (926)