SOUTHERN OREGON REGIONAL ECONOMIC DEVELOPMENT

Southern Oregon Economic Conditions Index

2026 INAUGURAL EDITION

An assessment of regional economic sentiment, alongside the data.

Jackson and Josephine counties - published July 2026

SOREDI

Contents

How to read the scores

Every chart reports one score: the share who agree minus the share who disagree, from -100 to +100. The sidebar on page 5 provides more detail.

The index at a glance

Six composite scores gather the whole survey on one page, the baseline every future edition will be measured against. Page 26.

In the region's own words

Respondents wrote candidly, and this report quotes them verbatim throughout: messages to the state, to local leadership, and to the region itself.

Introduction

Southern Oregon has never lacked opinions about its economy. What it has lacked is a measurement the whole regoin shares.

This index is that measurement. In June 2026, 244 of the region's decision-makers, the people who lead its businesses, its local governments, and its community and workforce organizations, answered the same structured questions about the conditions they work in every day. Their answers were scored, screened, and set beside the region's objective economic data. What they agree on, where they divide, and what they want built are now on the record.

The findings are not always comfortable, and they were not meant to be. They were meant to be honest. Where the region is strong, this report says so. Where it is constrained, the report says that too, along with something rarer: how much agreement already exists about what to do next.

The index will return every two years, ahead of legislative planning for the long session, so that the region's evidence is current when decisions are being made. This first edition sets the baseline.

To the 244 people who gave their time and their candor: this report is your voice, organized. Use it.

-Blair Sundell, Executive Director, SOREDI

01

Executive Summary

The Southern Oregon Economic Conditions Index measures how the region's own decision-makers read the economy of Jackson and Josephine counties. This first edition draws on a survey of the people who lead the region's employers and public institutions, fielded in June 2026 and read alongside objective regional data. Roughly three in four respondents set or directly shape strategy for their organizations. The index will publish every two years, timed to inform legislative preparation ahead of each long session.

The region agrees on where it stands. Every respondent group agrees that quality of life supports recruiting and retaining workers, the only question about current conditions where every group lands positive. Respondents also agree on what they want to grow. Healthcare delivery is the single most chosen growth cluster. Manufacturing, taken across its two cluster forms, is the most widely chosen growth theme. Tourism and outdoor recreation follow closely, and Josephine County respondents put outdoor recreation first. Knowing the assets and naming the growth industries is the basis for recognizing regional identity.

The region also agrees on its heaviest constraint. Every respondent group rates workforce housing sharply negative, with no internal disagreement anywhere in the data. When every group reads housing the same way, a regional housing effort starts with agreement instead of an argument.

State policy alignment ranked lowest of anything in the survey. Respondents in every group, government respondents most of all, disagree that the region is heard or understood in state economic policy. The open-ended responses say what they mean with precision: policy calibrated to Portland-scale conditions and applied uniformly, at a size and pace smaller communities cannot absorb.

Beneath the agreement, small and large employers describe two different economies. Firms with fewer than about fifty employees report much harder current conditions than firms above that line. Hiring is harder for them, and quality of life, the region's most agreed-upon asset, does far less to help them attract candidates than it does for large employers. The results points to retention and expansion support for the businesses already here as the region's clearest near-term opening. Business Oregon's draft statewide framework names business retention and expansion as an action area and lists economic development districts among its partners. The regional data supplies the Southern Oregon detail behind that direction.

The 2026 Index in Brief

Four numbers frame this report: who went on the record, the region's heaviest constraint, its bright spots, and when the index returns. The sections that follow carry the full story.

Respondents
244

Business, government, and community leaders surveyed in June 2026; three in four set or shape strategy for their organizations.

Workforce Housing
-80

The survey's strongest agreement: every group rates housing as the region's heaviest constraint.

Broadband Infrastructure
+28

The region's strongest positive, and the one infrastructure item respondents agree already delivers.

The Next Edition
2028

The index returns every two years, in preparation for each legislative long session.

The Region and the Survey

02

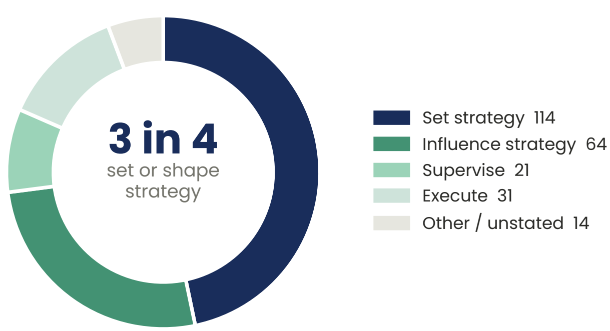
Summary

The index rests on 244 responses gathered in June 2026. Three in four respondents hold senior decision-making authority in their organizations. Private business supplies the largest share of voices, with government and the region's community and workforce organizations well represented, and the sample pairs a local and regional core with a sizeable cross section of statewide and national perspective.

Breakdown of Respondents

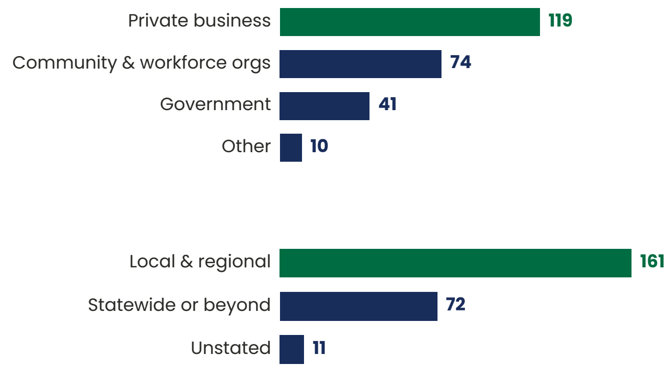
The survey gathered 244 usable responses. Private business and industry account for 119 of them. Community and workforce organizations, a group that spans economic development, education, healthcare, and workforce partners, account for 74. Government respondents account for 41, with 10 respondents outside those groups.

What distinguishes this sample is not its size but its seniority. Of the 236 respondents who described their decision-making scope, 114 set strategy and make final decisions for their organizations, and another 64 directly shape strategy for a department or team. The voices in this report are, for the most part, a broad cross section of the region's decision-makers.



Source: SOECI 2026 survey. Roughly three in four respondents set or directly shape strategy for their organizations.

Respondents described the geography they serve or represent. Most named the region itself, whether a single city, a county, or the two counties together. Alongside that local core sits a sizeable cross section of respondents whose work extends beyond the Jackson and Josephine county lines, adding the statewide and national perspective that proper comparative analysis needs.



Source: SOECI 2026 survey. A local and regional core, and a sizeable cross section of respondents with statewide or national reach.

Index Scoring and Interpretation

Most survey items asked for agreement or disagreement with a statement about regional conditions. Each item is reported as a single score: the share who agree minus the share who disagree. A score of zero means agreement and disagreement balance. A score of -50 means disagreement outweighs agreement by fifty points. The farther from zero, the stronger the reading: broadband, the region's strongest agreement that something works, scores +28, and workforce housing, its strongest agreement that something does not, scores -80. Respondents who answered "I don't know" on an item are set aside for that item.

Two ranking questions asked respondents to pick and order their top five action priorities and their top five growth clusters. Rankings are scored by position, so an item ranked first earns more than an item ranked fifth, and the totals order the lists that appear throughout this report.

Survey Findings Alongside Regional Data

Where an objective indicator exists for something respondents rated, this report presents the two together and names the relationship: the indicator confirms the sentiment, extends it, or diverges from it. The objective layer draws on the SOREDI Regional Economic Data Explorer, a public dashboard built and maintained by Autom Insights, and on published federal and state sources cited where they appear. Sentiment with no objective counterpart is presented as what it is, the considered reading of the region's decision-makers.

03

Where Southern Oregon Stands Strong

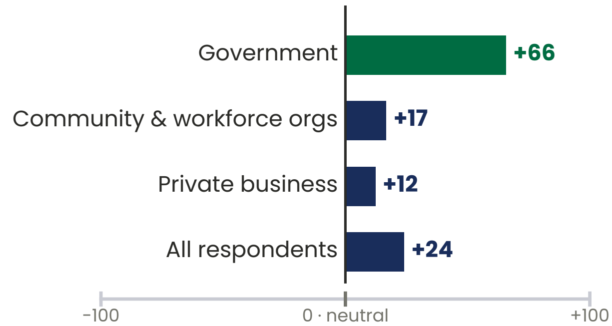
Summary

Quality of life earns a positive rating from every respondent group, the only question about current conditions with that distinction. Broadband stands out as the infrastructure asset. Asked where the region should grow, respondents across every group converge on the same short list: healthcare delivery leads the individual rankings, manufacturing is the most widely chosen theme overall, and tourism and outdoor recreation sit close behind. Organizations describe working relationships that function. These are the assets the rest of this report builds from.

Quality of Life as a Recruiting Asset

Quality of life is Southern Oregon's most agreed-upon economic asset. Every respondent group rates it as a support for recruiting and retaining workers, and no other question about current conditions earned agreement from every group, which makes it the natural opening line for anyone presenting the region to an outside audience. The open-ended responses show what respondents have in mind: *"Our beautiful valley with all the recreational opportunities and the mild four-season climate." "We have a beautiful region with wonderful natural resources and an attractive climate. And, on a national level, we are relatively affordable."*

Larger employers feel that advantage most; for the smallest firms it reads closer to neutral, a divide Section 5 takes up in full. One private business respondent puts the question plainly: *"It's always been 'Lifestyle', outdoor activities and access. Not sure if it's ever been enough to retain talent."*



Source: SOECI 2026. The only current-conditions question that reads positive in every respondent group; government rates it most strongly.

Broadband and Regional Infrastructure

Broadband is the bright spot on the infrastructure list, the one item where respondents clearly agree the region has what it needs. Anyone introducing **Southern Oregon** to an outside audience can put connectivity in the same sentence as quality of life. And while broadband delivery sufficiently meets the needs of the respondent group, download speeds reported through the Explorer still trail the state average, 51 megabits to 70, so the region has room to build on an asset respondents already count as adequate. Water and wastewater sit near neutral, and for infrastructure, no news is good news. Transportation reads modestly negative and barely appears in the open-ended comments. Permitting and land supply score lowest on this list, and Sections 4 and 5 cover them in full.

Industry Growth Clusters

Every group in this survey wants the region to grow the same industries. Healthcare delivery is the single most chosen cluster and finishes in the top three for every respondent group. Manufacturing, offered in two forms, industrial and advanced, is the most widely chosen theme of all: more respondents placed at least one manufacturing cluster in their top five than any single industry. Tourism and outdoor recreation round out the leading picks.

The agreement matters more than the exact order of the list. A Grants Pass government respondent makes the healthcare case in economic terms: healthcare delivery *"has to be in the top mix given average earnings, expanding senior population, quality of life, capacity to spin-off other industries."* That choice extends a position the region already holds, since health care and social assistance is Southern Oregon's largest employment sector. The manufacturing choice looks further ahead, and the energy behind it is easy to hear: *"We're so close to breaking it all open and manufacturing jobs deliver $180k in GDP per role, so the focus should be on adding more as a way to become a beacon for the rest of the state to take notice."*

Source: SOECI 2026. Healthcare delivery leads the individual rankings; manufacturing across its two forms is the most widely chosen theme.

#1 Sector theme: only

+1.2%

projected job growth

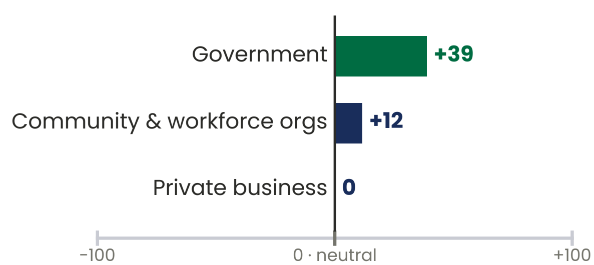
Manufacturing is the most widely chosen growth theme; yet current trends project jobs nearly flat.

Source: Oregon Employment Department

The state's projections back half of the region's picks, and turn the other half into a preparation signal. The Oregon Employment Department projects health services as the region's largest job gain over the next decade, with hospitality second, which puts independent numbers behind the region's top cluster choices. Manufacturing is different: OED projects it nearly flat, about one percent growth in ten years, while respondents made it their most widely chosen growth theme. The demand the region is calling for will need capacity built ahead of the trend, in training, sites, and housing, and that is a signal the region's colleges and workforce partners can act on. Knowing the assets and naming the growth industries is the basis for recognizing regional identity, and on this evidence the region has done both.

Working Relationships Across the Region

The working relationships a regional effort would need are already in place. Government respondents rate collaboration clearly positive, community and workforce organizations modestly positive, and private business lands right at the middle (neutral). The appetite for more shows up throughout the open-ended responses; what respondents want built on top of those relationships, a single regional voice, is taken up in Section 5.



Source: SOECI 2026. Collaboration reads positive to neutral in every group.

> ***"When government works alongside businesses, agencies or nonprofits, things get done. Please make efforts to regularly connect across sectors with partners who can open up additional opportunities."***
>
> **- Illinois Valley community organization respondent**

04

Where the Region Faces Pressure

Summary

Respondents return to four concerns throughout the survey. Workforce housing draws sharp criticism from every respondent group, with no internal division, and it is the region's top-ranked action priority. State policy alignment ranked lowest of anything in the survey, and the open-ended responses spell out exactly what respondents mean. Cost expectations dominate the twelve-month outlook. And the tax concern is specific rather than general. Each of these concerns arrives with something unusual attached: agreement broad enough to act on.

Workforce Housing

Workers can only take jobs where they can afford to live, and survey respondents agree: housing is failing working families. Business says it. Government says it. The organizations serving working families say it strongest of all. No question in the survey produced more agreement: -80 overall, every group affirming that housing availability is constraining the region's ability to attract and retain workers, and first place when respondents ranked their action priorities, in every group and both counties.

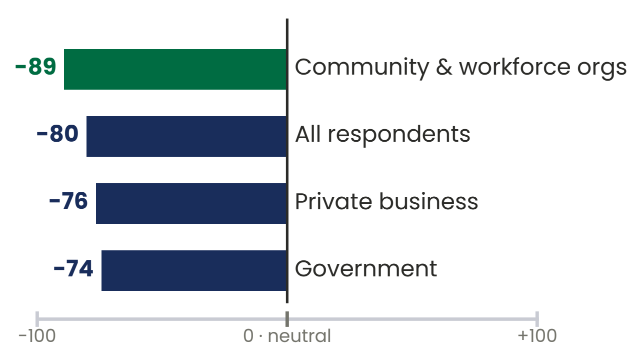
The objective data measures what respondents describe. More than half of the region's renters, 56 percent, spend at least 30 percent of their income on housing, ranking 33rd of Oregon's 36 counties (U.S. Census Bureau ACS via the SOREDI Regional Economic Data Explorer). Home prices run 13.8 percent below the state, but household income runs 17.4 percent below (and output per worker trails by a similar margin), so the region's cheaper homes come with even smaller paychecks. For working people trying to buy in, the gap is two numbers: 80 percent of employees surveyed across seven regional employers can afford no more than $2,000 a month, and the payment on a median-priced home for a new buyer runs about $2,686 at current rates (Annum Workforce Housing Survey, 413 employees, via the Explorer). One statewide-scope respondent draws the full chain: "Housing availability, buildable land, and permitting timelines are the most immediate constraints on economic growth in Southern Oregon."

$2,000
vs
$2,686

is what workers say they can afford to pay each month versus what it costs to own.

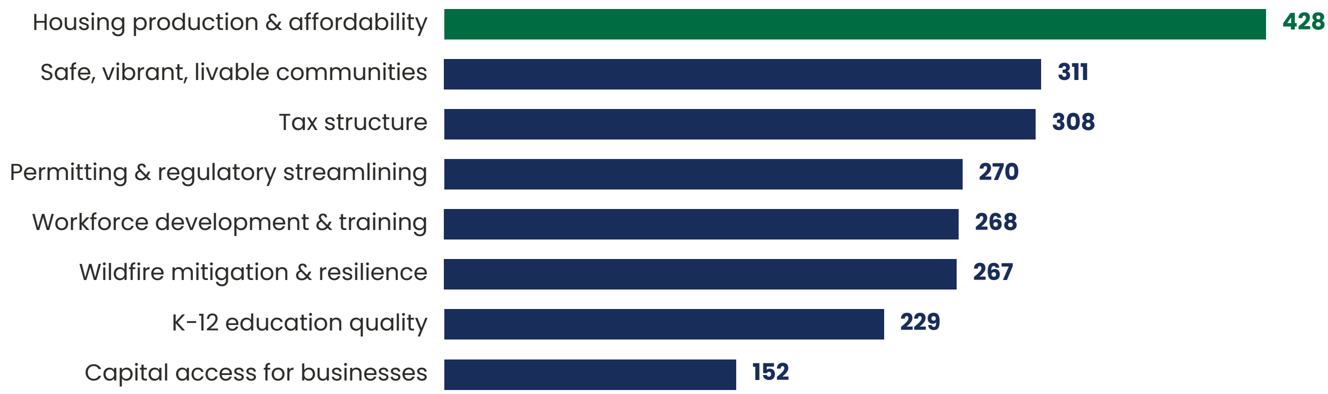
Source: Annum Workforce Housing Survey, via the SOREDI Regional Economic Data Explorer.

Because every group surveyed already agrees on housing, a regional housing effort would start with its leadership aligned. Housing efforts often stall before they reach a single neighborhood meeting, with builders, employers, and governments divided on whether the problem is real; among this region's decision-makers, that argument is already settled, and the harder conversations can start from there.



Source: SOECI 2026. The most agreed-upon constraint in the survey, in every group.

Top-ranked Action Priorities



Source: SOECI 2026. Housing leads the region's action list; the next five priorities sit in a near-tie a full tier below it.

State Policy Alignment

Nothing in this survey scored lower than the five statements about state policy, and on whether the region feels heard; the region's own public officials were the most pessimistic of state policy alignment. Every group reads all five statements the same direction; the chart carries the full set.

What do respondents mean when they say the state does not understand the region? Four specific things, in their own words.

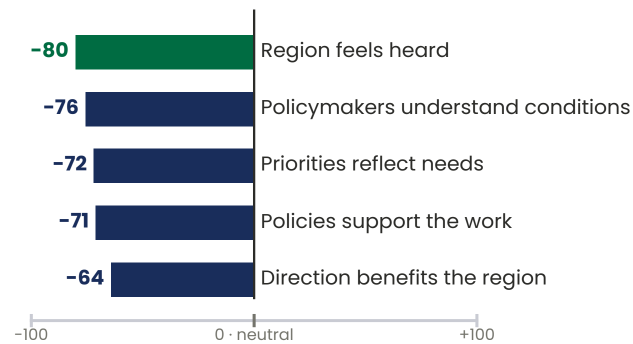
Policy is calibrated to Portland-scale conditions and applied uniformly: *"Policies and funding should not be a one-size-fits-all model based on what works in Portland."*

Programs arrive sized past what smaller communities can absorb. A local government respondent asks for investments that *"match the actual scale, capacity, and realities of smaller Oregon cities..."*

New laws outrun the capacity to adapt: *"Each year more laws are passed and none are repealed."*

Program design leaves little room for regional difference; one government respondent asks the state to *"build-in much more flexibility for how regions use and qualify for State resources."*

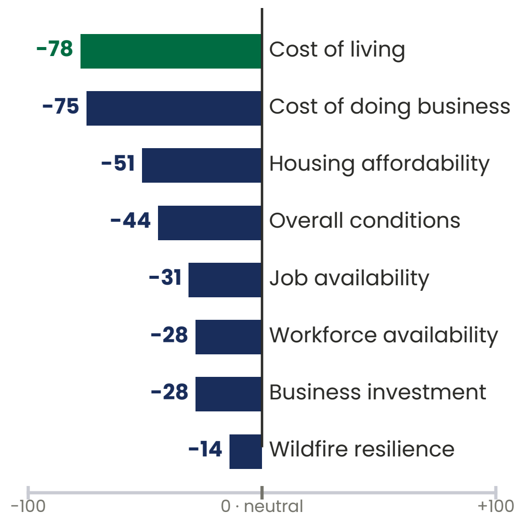
Every group gives the state the same answer, so the region can bring Salem one message backed by all of them. The message is already written in the four threads above, and the region's legislators and its institutions can cite the same evidence.



Source: SOECI 2026. The lowest-rated set of questions in the survey, and the region's public officials rate it lowest of all.

> ***"Policies and funding should not be a one-size-fits-all model based on what works in Portland."***
>
> **- Government respondent**

The Twelve-Month Outlook



Source: SOECI 2026. The concern concentrates on state taxes, and respondents name them without being prompted.

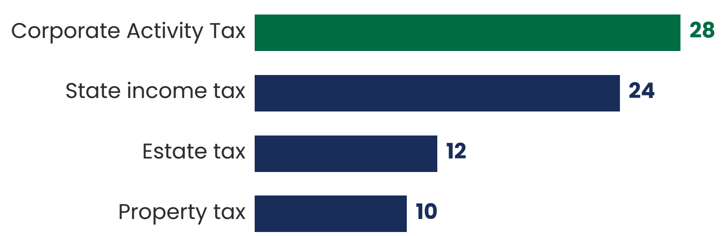
Costs are what the region expects to get worse, and no size of employer expects relief. Cost of doing business and cost of living drew the two most pessimistic twelve-month readings in the survey, and workforce housing affordability follows them. Of the eight items, the common thread among the three major pain points is the expense associated with each of them. The rest of the outlook is milder: respondents are noticeably less worried about business investment, and wildfire resilience comes closest to holding steady of anything they were asked about.

The outlook answers show which problems the region can keep working on itself and which will need to be addressed in Salem. The factors behind the cost concern, tax structure and regulation above all, sit mostly at the state level. However, there are local inputs that factor into the cost of doing business, of which "development fees" and "permitting fees" and "business personal property tax" were mentioned. Wildfire resilience is the one area respondents expect to hold steady, and the next edition of this index can test whether they were right.

Tax Structure and the Taxes Respondents Named

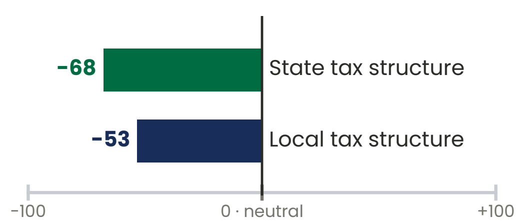
The region's tax concern comes with names attached: the Corporate Activity Tax first, with state income tax close behind. When respondents who ranked tax structure among their action priorities,, they were also asked which taxes they meant, unprompted. Property taxes were mentioned, but were of the least concern when compared to state-level taxes. Estate taxes were named more often. The concern also points at a specific level of government: respondents rate the state tax structure clearly worse than the local one, a fourteen-point gap on paired questions answered by the same people.. One statewide-scope respondent writes: *"Stop creating legislation that makes more hoops for businesses to jump through. Example: CAT Tax, for 'the privilege of doing business in the State of Oregon.' This is not helping our region's economy, only hindering it moving forward."*

The Taxes Respondents Named - Unprompted



Source: SOECI 2026. Asked which taxes they meant, respondents answered with names. Counts are respondents naming each tax in open-ended answers.

State vs. Local Taxes



Source: SOECI 2026. The concern concentrates on state taxes; the same respondents rate the local structure fourteen points less negatively.

Respondents named the exact taxes they want addressed, which gives state leaders a specific starting point instead of a general complaint. The taxes they cite are the same ones now under discussion in Salem, and Section 9 sets the regional evidence beside those conversations.

> ***"The CAT tax is likely the most damaging."***
>
> **- Regional Private Sector Respondent**

Childcare and the Workforce Constraints

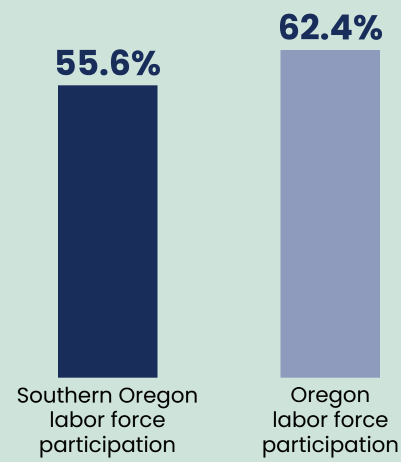
Seven in ten say childcare is holding the workforce back. One in four ranks it as a priority. Even among the respondents who agree childcare is a constraint, most chose other issues when picking their top five priorities. The region sees the problem; few of its leaders have made it a priority yet. And when respondents describe the constraint in their own words, they talk about cost: *"We need to focus on affordability for our families- childcare, housing, etc." "Can't afford childcare and rent."* The priority item respondents ranked carries the same pairing, childcare capacity and affordability.

The backdrop makes the constraint worth taking seriously. Southern Oregon's labor force participation rate is 55.6 percent, against 62.4 percent statewide (U.S. Census Bureau ACS Table S2301; BLS via FRED; accessed through the SOREDI Regional Economic Data Explorer). More than one factor is likely at work, and this report does not single out one cause: the region also runs older than the state, with a median age of 44.1 against 40.6. What the survey adds is which factors the region's decision-makers named when asked what holds participation back: childcare and housing. The institutional side holds up better: postsecondary alignment reads near neutral and job-seeker resources tilt slightly positive. Respondents say the squeeze comes from the cost of living and working here, not from the region's schools and training programs.

Seven in ten agree childcare is a problem and only one in four has made it a priority, which leaves room for someone to lead. The objective record shows the system can improve: both counties moved out of preschool-desert status between 2018 and 2024 (Pratt and Sektnan, Oregon State University, 2025).

70% of survey respondents say childcare is holding back the workforce.

25% rank it as a priority for action.



"Can't afford childcare and rent."

"We need to focus on affordability for our families-childcare, housing, etc."

Southern Oregon's median age is 44.1 years old, compared to 40.6 for Oregon.

05

Where the Voices Diverge

Summary

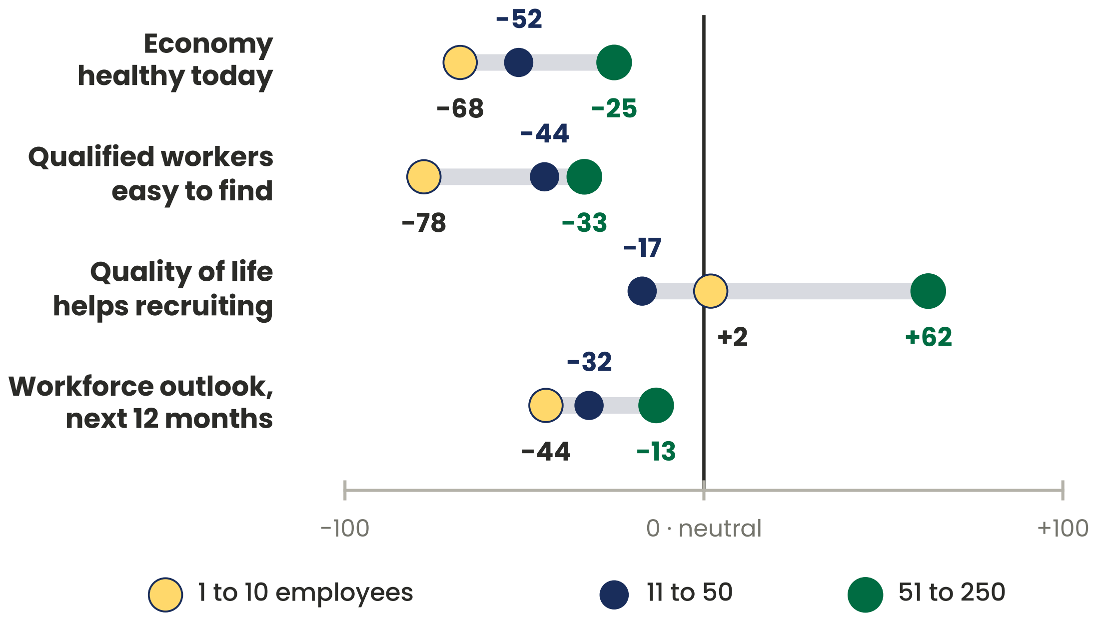
The widest divide in the survey runs through the private sector itself: firms above and below roughly fifty employees describe two different economies. Business and government read local permitting fifty points apart. The three respondent groups share three of the same top priorities but lead with different ones. Jackson and Josephine counties agree on the big constraints and differ in emphasis. And across every group, respondents say organizations work together while holding the belief that the region does not consistently speak with one voice. None of these divides is a contradiction. Each one tells a regional strategy where the work is.

The Fifty-Employee Line

At roughly fifty employees, this survey splits into two different economies. Below the line, respondents describe sharply negative current conditions, a labor market where qualified workers are difficult to find, and quality of life offers little help when they try to attract candidates. Above the line, conditions sit closer to balance, hiring is manageable, and quality of life is a strong recruiting tool. The same survey rates quality of life the region's most agreed-upon asset, and the divide is over whether that asset helps an employer win a hire, which it mostly does for the larger ones. The region's largest employers, those above five hundred, answered in the following manner: most affirm growth, workable hiring, and a positive twelve-month workforce outlook, and every one calls quality of life a recruiting asset.

A likely explanation for the outlook of employers above the 50-employee line could be scale itself: wider recruiting reach, more room in pay, and staff whose job is handling process work, while the smallest firms hire from the local labor pool at local wages. One multi-state respondent states the structural point: *"Structural capacity cannot be imported overnight via a single corporate giant. It must be cultivated from the ground up by reducing friction for all enterprises."*

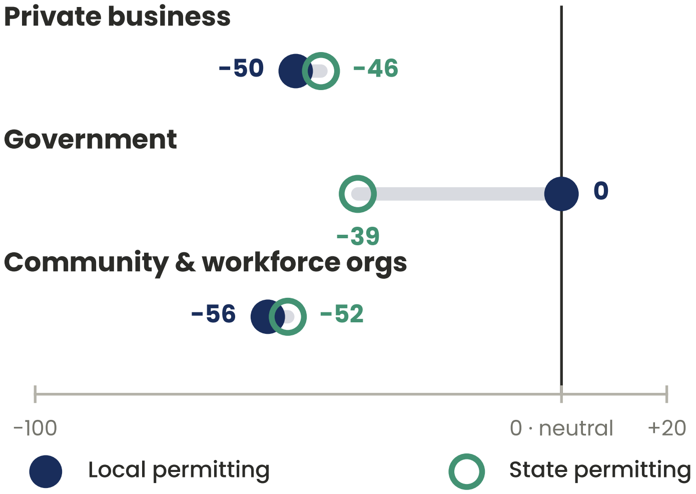
One program built for all businesses will fit either the small firms or the large ones, not both. The conditions that would let smaller firms experience the steadier economy larger firms describe, housing, hiring, permitting, and tax structure, are exactly the priorities respondents ranked highest in Section 4. Section 6 takes this finding to its conclusion.



Source: SOECI 2026. Below roughly fifty employees, respondents describe a different economy than the one above the line. Nine companies with over 250 employees responded, which is below the minimum of n=10 for sub-segment reporting.

The Local Permitting Divide

Business and government are fifty points apart on whether local permitting works. Private business rates it sharply negative, government respondents land at exact balance, and the community and workforce organizations rate it much the way business does. State permitting shows no such split; every group reads it negatively, so the disagreement is specifically about how local processes are experienced by the people moving projects through them. Two details sharpen the picture: local permitting reads worse as firms get larger, likely because larger projects face more layers of review, and in Josephine County permitting climbs into the top three priorities. A Grants Pass respondent: *"Reducing fees and development fees in particular should be addressed. They are prohibitive to new development."*



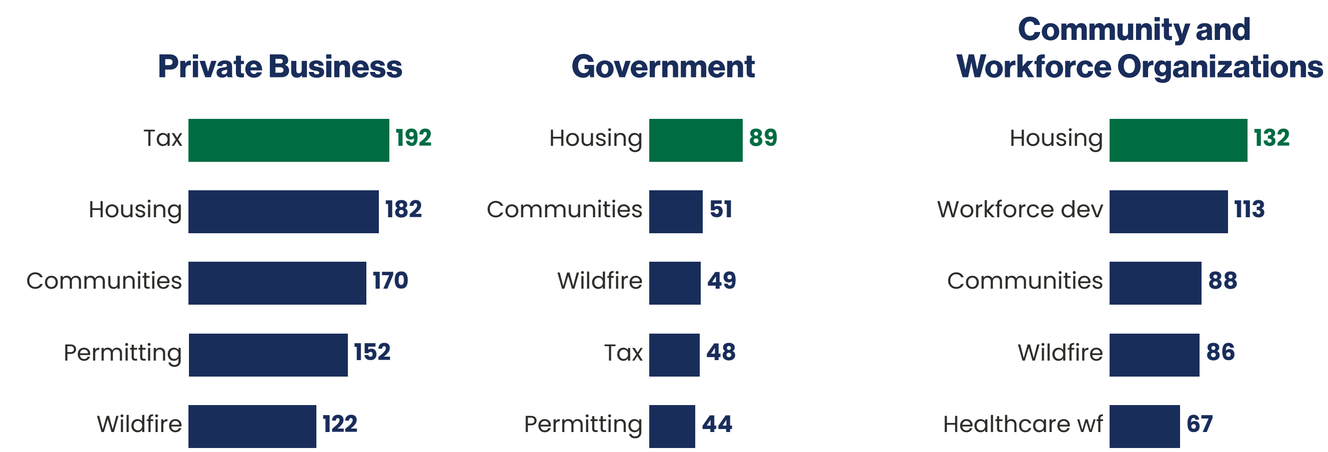
Source: SOECI 2026. The fifty-point local gap disappears at the state level, where every group agrees the process is slow.

Comparing actual permit timelines against what applicants experience would show why business and government describe the same process so differently. One shared picture of how permitting actually performs would serve everyone, and respondents in both counties have already pointed at fees and processing times as good places to start.

Shared Priorities, Different Leads

Housing, livable communities, and wildfire mitigation made every single group's top five. What differs is what each group puts first: private business leads with tax structure, government and the community and workforce organizations lead with housing. The rest of each list reflects each group's daily work, with business and government also placing tax and permitting in their top five while the community and workforce organizations fill those slots with workforce development and healthcare workforce instead.

Anyone speaking for the region can build the message around the three priorities every group shares. The rankings also show which priority to open with for a given audience: housing for government and community audiences, tax structure for private business.



Source: SOECI 2026. Housing, conditions for livable communities, and wildfire mitigation appear in the top five of every respondent group, a level of cross-group agreement no other priorities achieved. The differences are in the lead position: private business opens with tax structure, while government and the community and workforce organizations open with housing. Ranking points reflect how highly respondents placed each item among their top five choices.

Jackson & Josephine Comparison

“Jackson, Josephine and Douglas County make up a unique cross-section of communities that bridge, rural, urban, suburban, and agricultural lives.”
- Statewide education & workforce respondent

“We have massive needs to address wildfire in particular, which requires construction/landscaping companies trained in the art of wildfire risk reduction…”
- Ashland government respondent

“The lack of industrial facilities for small manufacturers, fabricators, etc in Josephine County severely hampers the ability of small businesses to start and expand without leaving the county.”
- Illinois Valley business owner

“We think tourism is a key to better quality of life in Southern Oregon.”
- Grants Pass business owner

Jackson and Josephine

The two counties agree on the fundamentals and differ on what comes next. Housing, tax, and livable communities make both top-five lists, and the questions about state policy read sharply negative in both. The differences are local, and the open-ended responses explain them: Jackson ranks wildfire mitigation second and scores healthcare workforce capacity far more negatively than Josephine. This is consistent with a county that is home to the region’s hospital systems and that lived through the Almeda Fire, while Josephine leads with conditions for safe, livable communities, elevates permitting into its top three, and picks outdoor recreation as its top growth cluster. For Josephine, the small-business and gateway-community perspective shows through.

Jackson and Josephine can pursue different local priorities and still make the same regional case, because they agree on the fundamentals. The county-specific priorities, wildfire and healthcare capacity in Jackson, permitting relief and outdoor recreation in Josephine, are where county-level effort would differ, and both are visible in this data in the counties’ own words.

	Jackson	Josephine
1	Workforce housing	Livable communities
2	Wildfire mitigation	Workforce housing
3	Tax structure	Permitting
4	Livable communities	K-12 education
5	K-12 education	Tax structure

Source: SOECI 2026. Shared fundamentals, different emphases. Both counties rank housing and tax; each adds its own next priority.

Sentiment and Ranked Priorities

Across the private sector, what respondents feel and what they rank do not fully match, and the gaps are informative. Three quarters read housing as a workforce constraint and just over half rank it among their top priorities; the same pattern holds for state tax, and for permitting at slightly lower levels. In each case, roughly a third of the frustrated chose other issues when picking their top five. The ranking question forced a choice among seventeen items, so the lists in Section 4 show where respondents most want energy spent, not simply what frustrates them.

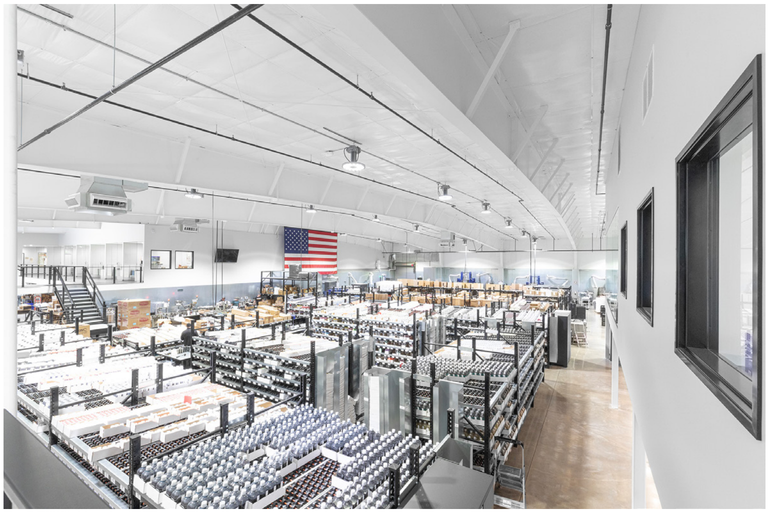


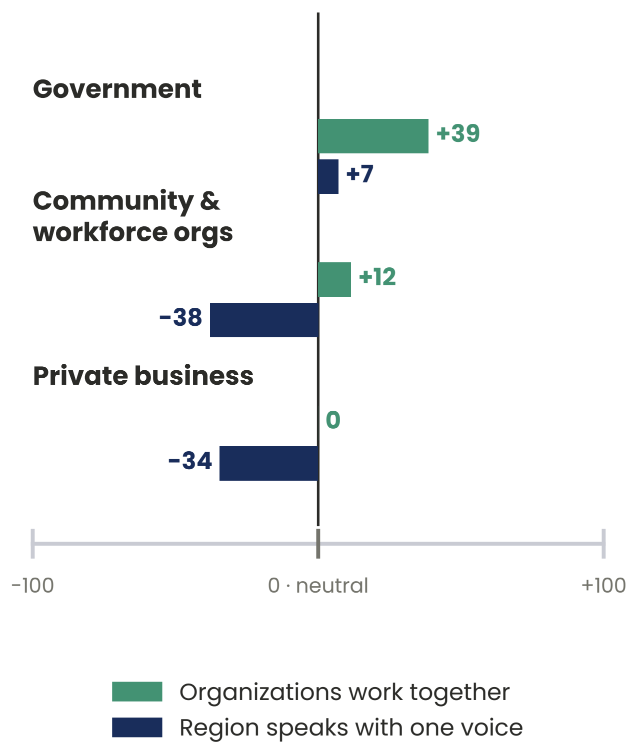
Photo courtesy of NIC Industries, White City, OR.

The Unified Voice Question

The survey asked two related questions: do the region's organizations work together, and does the region speak to the state with one voice? Every group answered the two questions thirty to fifty points apart. Government is the only group that leans, barely, toward a unified voice; private business splits exactly evenly on working together; and the community and workforce organizations, who coordinate for a living, are the most emphatic that the single voice is missing. One statewide-scope respondent puts the request in one line: *"Stop building silos and work to connect the region better."*

The region's organizations get along; what they lack is one shared way to speak to the state together. Building that is a far easier assignment than repairing broken trust, and this survey has already produced the first things it would say: the region's agreement on housing and its agreement on state policy.

> ***"We have tremendous opportunity here in Southern Oregon, let's make it known!"***
>
> **- Multi-state private business respondent**



Source: SOECI 2026.

06

Business Retention and Expansion: The Region's Ask

Summary

The clearest opening in this survey is support for the businesses the region already has. The fifty-employee line from Section 5 shows where that support is needed: the region's smallest firms report the hardest conditions, and the constraints they name, hiring, housing, permitting, and tax structure, are the region's top-ranked priorities. Respondents ask for this focus directly in their own words. And the direction lines up with the state's: the Governor's Prosperity Roadmap makes retaining and growing Oregon businesses one of its three goals, and Business Oregon's draft statewide framework commits to raising business retention and expansion to the same priority as recruitment, with economic development districts named among its partners.

The Case in the Numbers

Regional economies are built mostly from the businesses already in them, and Southern Oregon's respondents say those businesses are the ones that need the help. Most of the region's employers are small firms below the fifty-employee line, and below that line businesses describe a harder economy on nearly every question the survey asked. The constraints they report are the same four items the whole survey ranked highest. Qualified workers are hardest to find for the smallest firms. Housing keeps candidates from saying yes. And permitting reads negative across the private sector at every size.

The Case in the Region's Words

Respondents make the retention argument themselves, unprompted. A multi-state private business owner: *"Small business is the backbone of America. It grows into larger business and highly supports the economy. Support all forms of business, but small business and start-ups should be given incentives to locate here."* A regional government respondent describes what retention takes on the ground: *"We have to fight uphill for every single job retained and created here, and work with every single business on a multitude of issues and red tape and barriers to keep just one living-wage job on the payroll here."* A Talent respondent in the education and workforce field: *"We need greater support/funding in all ways to educate and train, successful small business people. They create stronger connected communities."*

The theme repeats across the open-ended responses to every audience: put more energy into the businesses that are already committed to the region.

The Direction the State Has Already Named

The regional findings and the state's own strategy point the same way. The Governor's Prosperity Roadmap sets "Retain and Grow Oregon Businesses" as one of its three strategic goals. Business Oregon's draft framework for the statewide economic development strategy goes further, naming business retention and expansion as one of its eight action areas with a stated goal to "elevate Business Retention and Expansion to the same level of priority as business recruitment," and it lists regional economic development organizations and economic development districts among the partners for that work.

The framework describes itself as a starting point and invites exactly this kind of regional detail, and that is what this survey supplies. The fifty-employee line says which businesses need the support. The priorities ranking says what the support should address: hiring, housing, permitting, and operating costs, the same four priorities the region ranked highest. When the state builds out its retention and expansion strategy, Southern Oregon is a region where the need is documented, the partners are named in the framework itself.

What the Region is Asking Help With

Constraint	The Evidence
Hiring	Qualified workers score -78 for firms of 1 to 10 employees and -44 at 11 to 50, against -33 at 51 to 250. The smallest firms report the hardest labor market in the survey (Section 5).
Housing	The survey's strongest agreement: -80 overall, with every group affirming that housing constrains hiring, and the community and workforce organizations most emphatic at -89. First-ranked priority in every group and both counties (Section 4).
Permitting	Private business rates local permitting -50 while government sits at exact balance, a fifty-point divide over the same process, and the problem worsens as firms grow (Section 5).
Tax Structure	Named taxes, not general complaint: the Corporate Activity Tax cited, unprompted, by 28 respondents, state income tax by 24, and the state structure rated fourteen points worse than the local one by the same respondents (Section 4).
Operating Costs	The two most pessimistic twelve-month readings in the survey: cost of doing business at -75 and cost of living at -78, with no size of employer expecting relief (Section 4).
Childcare	Seven in ten agree childcare is holding the workforce back; one in four has made it a priority. The constraint is acknowledged and largely unaddressed (Section 4).
Talent Recruitment	Quality of life helps the largest employers win hires (+62 at 51 to 250) and barely helps the smallest (+2 at 1 to 10). The region's best asset is working for only part of its economy (Section 5).

Source: SOECI 2026. The support existing businesses need is spelled out by the region's own top priorities.

Photo courtesy of NIC Industries, White City, OR.

07 The Healthcare Workforce Spotlight

Summary

The region chose healthcare delivery as its top growth cluster, and the same survey says the region is not staffing the sector it chose. Two in five respondents made healthcare a top-five priority. Two thirds said conditions do not support attracting and retaining the doctors, nurses, and healthcare workers the region needs. The healthcare executives in the sample confirmed what the rest of the survey said. This section covers that gap: the region wants to grow healthcare and reports that it cannot staff it.

The Concern from Every Direction

Two in five respondents who ranked priorities made healthcare one of them. The survey offered two healthcare priorities among its seventeen choices, one about workforce and infrastructure, the other about attracting and retaining healthcare workers, and respondents in every group placed at least one of the two in their top five, community and workforce organizations most of all.

Two thirds say the region cannot attract and keep the healthcare workers it needs. That is the answer respondents gave when asked directly whether regional and state conditions support attracting and retaining the doctors, nurses, and healthcare workers Southern Oregon needs. The question asked broadly, about regional and state conditions together, rather than about any single cause, and the written comments say which conditions respondents have in mind: pay that runs low *("Southern Oregon is always on the low end of salary ranges for almost all sectors")*, regulatory burden, federal reimbursement changes arriving on short timelines, and the housing constraint that runs through the entire survey.

Four in ten sit in the hardest position the survey could record: healthcare access matters for attracting workers, and the region is not attracting the healthcare workforce itself. The survey asked those two questions separately. Set each respondent's answers side by side and the region's decision-makers sort into nine positions; the largest by far is that one. Healthcare is not one sector's staffing problem here. Respondents treat it as part of what the region can offer any worker it tries to recruit.

	Access matters	Neutral	Access does not matter
Region cannot attract them	71	27	21
Neutral	19	11	6
Region can attract them	14	4	4

Source: SOECI 2026. 40% of respondents land in the hardest cell: healthcare matters for attracting workers, and the region cannot attract the healthcare workforce itself.

The View from Inside the Sector

The healthcare executives in the sample said what everyone else said. Six respondents lead healthcare organizations: two at hospital or health system scale, two at community health centers, two at independent medical practices. All six hold decision-making authority, three setting strategy for their organizations and three shaping it for their departments, and three lead organizations of more than five hundred employees. Five of the six rated the support question; the sixth answered "I don't know." Unanimously, the healthcare leaders who rated it disagreed that conditions support attracting and retaining healthcare workers. There is

no gap between how the sector's leaders see this and how the region sees it.

Their written comments describe financial strain inside the region's largest institutions, consolidation pressure on independent practices, and federal policy changes arriving faster than providers can adapt. One healthcare executive writes: *"Federal policy in HR1, and Oregon's forced implementation of it with a shorter than expected timeframe will impact all healthcare providers and health insurance plans dramatically. Our region is bracing for significant losses..."* Another asks simply: *"Help reduce regulatory burdens on businesses and health care."*

The sector under strain is the region's largest employer, and the one the state projects to grow most. Health care and social assistance, the federal statistical sector that spans hospitals and clinics through childcare and family services, includes roughly 28,000 jobs, one of every five in the region and a larger share of regional employment than the sector holds statewide, and the Oregon Employment Department projects it to add more jobs over the coming decade than any other regional industry. Whether that projection lands is a staffing question, which is exactly the question this survey says the region has not answered. A Jackson County community respondent draws the line directly: *"Health care capacity and wildfire resiliency should be top concerns for this region to grow and thrive."*

Healthcare came out of this survey as both a top priority and the top industry to grow, with the sector's own leaders in agreement about the workforce problem. Few regional challenges arrive with that much agreement already in place. The concern is strongest in Jackson County, where the region's largest health systems operate; the next edition will track whether that gap moves.

27,982

jobs in health care and social assistance, the region's largest employment sector: one in five regional jobs versus 15 percent statewide.

The region's top-ranked growth cluster, chosen by every respondent group.

Sources: U.S. Census Bureau ACS via NERDE, Argonne National Laboratory, accessed through the SOREDI Regional Economic Data Explorer; SOECI 2026.

Methodology note: Of the 216 respondents who ranked priorities, 84 placed at least one of the two healthcare items in their top five. Of the 183 who rated whether conditions support attracting and retaining healthcare workers, 123 disagreed. Of the 177 who answered both paired questions, 71 sit in the cell where healthcare access matters for attracting workers and the region is not attracting the healthcare workforce. Six respondents lead healthcare organizations; figures for this group are reported as raw counts because the base sits near the five-respondent disclosure floor this survey applies (UK Office for National Statistics disclosure guidance, 2018). All six work from Jackson County or serve the region as a whole; the inaugural sample includes no Josephine-based healthcare providers, an outreach priority for the next edition.

08

The Region in Its Own Words

Summary

The survey closed by asking respondents what they would say directly to three audiences: state policymakers, city and county leadership, and the region's economic development organizations. Some themes appear in the messages to all three, housing and small-business support above all. Each audience also gets a message of its own. Respondents tell the state that one-size-fits-all policies do not work. They show local leadership what doing business here actually costs. And they hand the region's economic development organizations practical requests about where to spend their energy next.

To State Policymakers

The message to the state is that its policies don't work for all parts of the state. The comments carry the four threads Section 4 laid out, in the voices that make them concrete. On fit: *"Our region is important, and our needs are different than those in Eugene, Bend or Portland. Listen to us."* On uniform policy, a Medford government respondent: *"Make decisions that benefit the whole; Don't make laws based on one bad story or decision one community made."* And on what the region asks for instead, a statewide-scope respondent lays out the full case: *"Our region has the workforce, industry base, and quality of life to grow, but housing constraints, workforce participation challenges, and infrastructure limitations are holding us back. State policies need to better reflect the realities of rural regions and support coordinated solutions to these issues."*

To Local Leadership

The messages to city and county leadership get practical fast. Fees and permitting lead, and a Grants Pass business owner compresses that agenda into one line: *"eliminate business personal property tax (county) and reduce permitting fees for business startup and expansion (city)."* Housing supply follows, with respondents pointing at specific tools: *"Relaxing zoning in developed areas to allow construction of multifamily housing would be a huge economic relief for families here."*

A second local theme runs through the messages: the condition of downtowns, public safety, and the experience of visitors. The respondents who raise it connect it to tourism and business attraction in the same comments, which is what makes it an economic message rather than only a civic one.

To the Region's Economic Development Organizations

The requests to the region's economic development organizations are practical and pointed forward. Respondents ask for presence on the ground: *"Get out of your office and walk the streets of our communities and find out face-to-face how you can help."* They ask for focus on the businesses already here, the same theme Section 6 carries in the region's own words. And the recurring strategic request is to keep coordinating a regional voice on state-level priorities, the piece Section 5 identifies as missing.

Read together, the three sets of messages say the region knows what it wants from each level: fit and flexibility from the state, lower friction from local government, and coordination from its regional organizations.

> *"Not all communities fit into the same box."*
>
> **-Applegate Valley community organization respondent**

Where Southern Oregon Meets the State's Frameworks

09

Summary

Oregon produced three statewide economic documents in the seven months before this survey closed: the Prosperity Council's recommendations on June 25, 2026, the Governor's Prosperity Roadmap in December 2025, and Business Oregon's draft framework for a statewide economic development strategy alongside it. This survey gathered its evidence in the same month the Council reported, and the results line up with all three. The regional data independently supports four of the Council's priority recommendations, confirms the conditions the Roadmap responded to, and adds the regional detail the draft framework says it needs.

Dec 2025	Dec 2025	Jun 2026	Jun 25, 2026
Governor's Prosperity Roadmap	Business Oregon draft framework	SOECI survey fielded	Prosperity Council recommendations

The Prosperity Council Recommendations

Southern Oregon's survey independently supports four of the Council's ten priority recommendations. The Council recommends reforming the Corporate Activity Tax; the CAT is the tax this region names most, and the Council's companion recommendation to update the estate tax also appears in the regional data, named unprompted by a dozen respondents. The Council recommends enforceable statewide permitting timelines; permitting is a top-five regional priority and the survey's widest business-versus-government divide. The Council recommends a statewide talent alignment strategy; workforce constraints run through every part of the regional data. And the Council recommends dedicated site readiness investment; land supply scored lowest of the region's infrastructure items, and industrial site readiness sits just outside the region's top priorities.

The Council's site readiness recommendation carries its largest single number: a dedicated and recurring fund of $250 million per biennium, deployed through the Industrial Site Loan Fund. The Council's reasoning is blunt, that *"Oregon cannot compete for jobs or build enough housing without a reliable supply of development-ready land,"* and the number matches what competing states have already committed: Pennsylvania has put $400 million into its PA SITES program, Ohio's All Ohio Future Fund carries $750 million, and Virginia has committed more than $150 million to its Business Ready Sites Program since 2022 (figures as published by each state's development agency, 2022 to 2026). Southern Oregon's respondents named the same gap in their own words: land supply is where their infrastructure ratings bottom out.

On some of the Council's recommendations, this survey is silent because its questionnaire was locked before the Council reported. The survey did not ask about state agency structure, emissions policy, a tax reform working group, modernization of land use statutes, or higher education funding levels. Some items carried common themes, which have been noted accordingly.

Prosperity Council Recommendation	Southern Oregon Viewpoint
Transform Business Oregon into the Oregon Commerce Authority	Not measured by the SOECI survey
Strengthen competitiveness with more pragmatic tax policies, including CAT and estate tax reform	The CAT is the tax the region names most, unprompted (28 respondents); the estate tax is named by a dozen
Convene a nonpartisan tax reform working group	Not measured by the SOECI survey
Establish enforceable statewide permitting timelines (a "shot clock")	Permitting is a top-five regional priority and the survey's widest business-government divide, fifty points
Reduce regulatory and administrative burdens 20% by 2029	The target itself was not tested. However, permitting reads negative across the private sector at every firm size
Adopt a market-based Cap and Invest program	Not measured by the SOECI survey
Establish a $250 million per biennium site readiness and infrastructure fund	Land supply scored lowest of the region's infrastructure items
Modernize statutes governing industrial and business land	Not measured by the SOECI survey
Establish a Governor's Cabinet of Economic & Talent Development and a statewide Talent Alignment Strategy	Workforce constraints run through every part of the regional data
Strategically align higher education funding with West Coast states	While not directly tested, education runs through the responses: K-12 education quality makes the region's top eight action priorities and both counties' top five, and fourteen respondents raise higher education unprompted, many asking the state to better support the region's university and community colleges.

Sources: Oregon Prosperity Council (June 2026); SOECI 2026.

The Governor's Prosperity Roadmap

The conditions that prompted the Roadmap are the same ones Southern Oregon's decision-makers are dealing with. The Roadmap opens from three concerns in the state's economic forecast: slowing job creation, elevated unemployment, and weak population growth. The regional survey shows how those statewide numbers feel on the ground: hiring reads as the hardest current condition for the region's small employers, respondents expect costs to outrun relief, and housing constrains who can move here and stay.

The Roadmap's third goal, retaining and growing Oregon businesses, is the goal this survey speaks to most directly. The survey shows which businesses need that support and what the support should address. The fifty-employee line in Section 5 identifies the firms facing the most difficult conditions, and the region's own top priorities, housing, tax, permitting, and workforce, are the constraints those firms name. A statewide retain-and-grow strategy that reaches firms below fifty employees will reach most of Southern Oregon's employers.

The Business Oregon Framework

Business Oregon's draft framework calls itself a starting point and asks for regional input; this survey is that input for Southern Oregon, gathered before the framework is final. The framework organizes the statewide strategy into eight action areas. Southern Oregon has something to add to each.

Action area	Southern Oregon's Answer
Business Climate	The framework names a "growing perception that policymakers, state and local governments, and elected officials are not aligned with or supportive of the business community." In Southern Oregon that perception is measured: the five statements about state policy scored lower than anything else in the survey, in every respondent group, and the Corporate Activity Tax is the tax respondents name most, unprompted.
Regulation	The framework's goal is streamlined, predictable permitting. The regional layer says where to look: business and government are fifty points apart on local permitting while agreeing that state permitting is slow, larger firms rate local permitting worse than smaller ones, and Josephine County elevates permitting into its top three priorities.
Workforce Development	The regional survey adds one design requirement: a workforce program that treats all employers alike will fit either the small firms or the large ones, not both. It also surfaces the two constraints employers name behind the hiring problem, housing and childcare, and the healthcare workforce gap that Section 7 documents.
Innovation, Entrepreneurship, and Capital Access	Capital access drew the mildest negative response in its question set and ranked eighth among action priorities. What the survey adds instead arrives unprompted, in the open-ended answers: "More funding support for ecosystem building and for new businesses," startup help that checks back after launch, and experienced advisors for the smallest firms. The objective data adds one flag worth carrying: the region ranks 16th of Oregon's 36 counties on a composite of local financial capacity (FDIC, NCUA, and SBA data via the SOREDI Regional Economic Data Explorer).
Sector Alignment	The framework asks which clusters each region should build around, and Southern Oregon has already answered: healthcare delivery first among individual clusters, manufacturing the most widely chosen theme, tourism and outdoor recreation close behind, with outdoor recreation leading in Josephine County. Every respondent group gave similar answers.
Business Retention and Expansion	The framework commits to "elevate Business Retention and Expansion to the same level of priority as business recruitment" and names economic development districts among the partners for that work. Section 6 of this report makes Southern Oregon's case for exactly that direction: which firms need retention support, what the support should address, and the region's own voices asking for it.
Business Recruitment	What respondents provided here is the regional half of a recruitment strategy: the assets a pitch can be built on, and the gaps that have to close for a recruited employer to land. The assets are verified: quality of life is the region's most agreed-upon strength, it does its best work on the larger employers recruitment targets, and broadband is the one infrastructure item respondents agree already delivers. The targets come with regional backing built in: every group picked healthcare delivery, manufacturing, and tourism and outdoor recreation as the clusters to grow, so recruitment aligned with those industries starts with the region already behind it. And the gaps are named and ranked: development-ready land scored lowest of the infrastructure items, and recruited employers bring workers who need housing they can afford. That is the regional detail a draft statewide strategy needs, supplied here for Southern Oregon.
Infrastructure	The regional ledger is specific. Broadband is affirmed, the one infrastructure item respondents agree meets the region's needs. Water and wastewater sit near neutral. Transportation reads modestly negative and draws little comment. Land supply scores lowest, which connects directly to the framework's development-ready land goal and to the Council's $250 million site readiness recommendation above.

Sources: Business Oregon draft framework (December 2025); SOECI 2026.

10

From Evidence to Possibility

Summary

This report does not make recommendations. It documents agreements, and agreements are what regional action is built from. The survey found four of them ready to use: the region agrees on housing, agrees on what to say to the state, agrees on which industries to grow, and agrees on its quality of life. It also found the places where a willing leader would meet the least resistance, childcare and housing first among them. And because this index returns every two years, everything measured here becomes a baseline.

The Agreements Are Ready to Use

Whoever takes up housing in this region starts with every group already in agreement. Business, government, and the community and workforce organizations rate the shortage the same way and rank it as the region's top priority. The consensus-building that usually comes first has already happened here. It is in this report.

Whoever speaks to the state for the region can carry one message with every group behind it. The five state policy questions drew the survey's strongest agreement, and the open-ended responses supply the specifics: policy calibrated to Portland-scale conditions, programs sized past smaller communities' capacity, law arriving faster than small organizations can adapt, and little flexibility in how regions qualify for state resources. Any of the region's legislators, cities, counties, or organizations can cite the same evidence, because all of their peers are in it.

Whoever builds on the region's growth identity is building on agreement, not argument. Healthcare delivery, manufacturing, tourism, and outdoor recreation came out of every respondent group's rankings, and the quality of life that anchors them is the region's most agreed-upon asset. The question people here ask, what does Southern Oregon want to be, has a first answer in this data, given by the region's own decision-makers.

The Open Lanes

Childcare is the clearest unclaimed opening in the survey. Seven in ten decision-makers agree it holds the workforce back; one in four has made it a priority. The record shows the system can improve, since both counties climbed out of preschool-desert status between 2018 and 2024. A workforce board, an employer coalition, or a provider network that leads on childcare starts with the agreement already gathered.

1. **Housing**
   The survey's strongest agreement (-80); first-ranked priority in every group and both counties
2. **One message to the state**
   The lowest-scored questions in the survey, read the same direction by every group
3. **A growth identity**
   Healthcare delivery, manufacturing, tourism and outdoor recreation, chosen by every group
4. **Quality of life**
   The region's most agreed-upon asset

Source: SOECI 2026.

Healthcare has the agreement and the anchor institutions; Section 7 documents both. A regional healthcare workforce effort would begin with two in five respondents already treating it as a priority and the sector's own leaders confirming the problem.

Business retention has the evidence and, now, the state direction. Section 6 lays out which firms need support and what the support should address, and Business Oregon's draft framework names retention and expansion as a statewide action area with economic development districts among its partners.

Permitting shows the widest distance in this survey between a process as designed and a process as experienced. Respondents rated the state and local processes separately and read both as falling short, the local one slightly less so; yet business and government still describe that same local process fifty points apart. At both levels, the gap sits between what the rules intend and what applicants encounter. Reform is already in motion where the state controls the process: House Bill 4084, passed this year at the Governor's request, created the Joint Permitting Council and a fast-track program for the largest investments. Continuing to pursue processes to streamline permitting at the state and local level is what respondents are asking for throughout the survey.

The Baseline This Report Sets

Every number in this report becomes more valuable the day the next edition publishes. This index returns every two years, timed to the preparation ahead of each legislative long session, and the second edition will answer questions the first can only pose.

The region's decision-makers went on the record in June 2026. The record is now the region's to use, and two years from now, the region will know what it did with it.

What the 2028 edition will answer

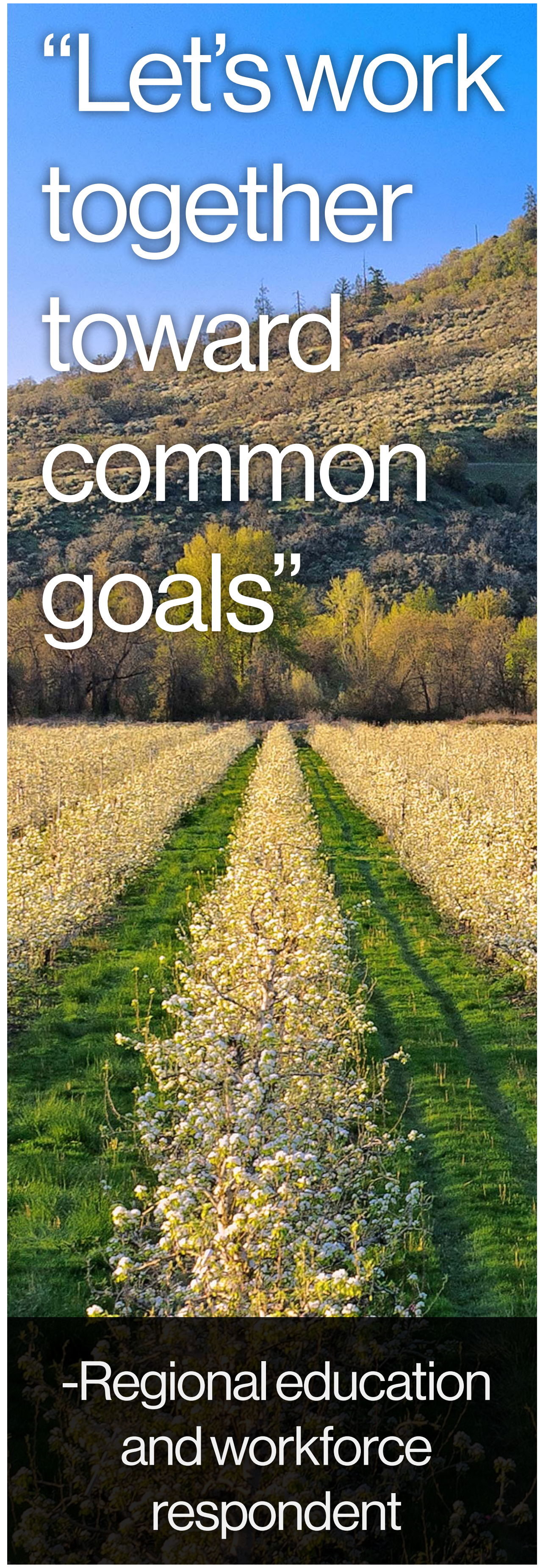
Did the fifty-employee line move, or did the two economies pull further apart?

Did the healthcare workforce gap narrow as the region grew its chosen cluster?

Did wildfire resilience hold steady the way respondents expect?

Did the region's reading of state policy move at all?

Southern Oregon
Economic Conditions Index



The Index at a Glance

Economic Conditions

-26.4

Current conditions read negative on all five items, from whether the economy is healthy today (-44) to whether the region competes for new business (-20). Even the mildest reading, business growth and expansion (-9), tilts negative.

−100 0 +100

Regional Capacity

-29.5

Infrastructure & permitting -20.8 · Workforce, capital & operating -38.3. Broadband (+28) and quality of life (+24) are the block's only positives; workforce housing (-80) and the state tax structure (-68) drag the operating side down.

−100 0 +100

Workforce

-36.9

Employers report qualified workers are hard to find, and the housing and childcare constraints weigh heaviest. Job-seeker resources tilt slightly positive, and the healthcare workforce carries its own spotlight in Section 7.

−100 0 +100

Forward Outlook

-43.8

Twelve-month expectations, read as direction rather than level. Costs dominate: cost of living (-78) and cost of doing business (-75) are the survey's two most pessimistic readings, and wildfire resilience (-14) is the most neutral.

−100 0 +100

Policy Alignment

-72.7

The lowest index in the survey. All five statements about state policy score between -64 and -80, in every respondent group, and the region's own public officials are most negative on whether the region feels heard.

−100 0 +100

Regional Collaboration

-8.3

The index closest to balance, and the most double-edged: respondents affirm that organizations work together (+9) while denying the region speaks with one voice (-30). The gap is the region's clearest coordination finding.

−100 0 +100

Methodology Reference

Method and Sources

The Southern Oregon Economic Conditions Index is a structured survey of the region's business, government, and community leadership, fielded in June 2026 and closed on June 30. It gathered 244 usable responses: complete submissions, together with partial submissions that progressed past the survey's substantive questions. Every response passed a documented multi-signal plausibility screen before analysis, and one response was excluded.

Survey items asked for agreement or disagreement with plain statements about regional conditions on a five-point scale with an explicit "I don't know" option. Each item is reported as a single diffusion score, the share who agree minus the share who disagree, on a scale from -100 to +100, adapting the regional-survey convention of the Federal Reserve Banks. Neutral answers count toward the base; "I don't know" answers are set aside for that item. Negatively worded items are reverse-coded so every score reads the same direction. The six composite indices are unweighted averages of their items' scores. Two ranking questions asked respondents to choose and order their top five action priorities and top five growth clusters; rankings are scored by position, five points for a first-place ranking down to one point for fifth, and those totals order the lists in this report.

Reporting thresholds are fixed and were set before fielding. Sub-groups are reported stand-alone at ten or more respondents, as raw counts near the five-respondent disclosure floor, and not at all below it. Quotations print verbatim and are attributed by role and place, never by name. Where an objective indicator exists for something respondents rated, the report presents the two together and names the relationship, drawing on the SOREDI Regional Economic Data Explorer and the primary federal and state sources behind it, cited where they appear. Every figure printed in this report was recomputed independently in a validation workbook of live formulas and reconciled against the screened response file before publication.

Review

The methodology was reviewed and approved before publication by an independent three-member panel, and the survey was pretested before fielding by regional professionals spanning business leadership, economic development, workforce, tourism, housing, education, and government. The survey was offered in English and Spanish throughout the field period.

The Complete Record

The complete methodology, including questionnaire design, screening rules, scoring construction, disclosure thresholds, bilingual administration, sources, and the role of analytical tools in the project, is documented in *SOREDI Methodology, Sources, and Standards*, available on request from SOREDI.

Acknowledgments

Methodology Review

The three reviewers below examined this index's methodology: its question design, its screening rules, its scoring construction, its disclosure thresholds. They challenged assumptions, sharpened definitions, and approved the approach.

Marta Tarantsey, Regional Development Officer

Marta Tarantsey is a Regional Development Officer with Business Oregon serving Jackson, Josephine, Klamath, and Lake counties, connecting businesses and communities with resources to thrive in Oregon. She holds an MBA from Willamette University and is an Oregon Certified Economic Developer. Her personal focus within the economic development discipline is innovation-based and creative business ecosystem building and poverty elimination via economic empowerment.

Guy Tauer, Regional Economist

Guy Tauer is the employment economist with the Oregon Employment Department covering the Rogue Valley and the South Coast, with the department since 1999. A native Oregonian with an economics degree from Southern Oregon University, he concentrates on labor force, economic, and demographic data, with recent published research on housing and construction trends.

Haylee Ulrey, Founder and CEO

Haylee Ulrey is the founder and CEO of Autom Insights, where she builds AI-powered community intelligence platforms that turn complex data into clear insights for better decisions. She works with partners across sectors on data architecture, dashboards, and scalable solutions that strengthen communities, and speaks frequently on AI, data strategy, and data-informed decision-making.

The pretest group

Before fielding, the survey was pretested by regional professionals spanning business leadership, economic development, workforce, tourism, housing, education, and government, including outside readers in Salem. Their feedback shaped the questionnaire respondents saw.

Acknowledgments

Spanish Translation Review

Offering the survey in Spanish was a decision about hearing more voices in the region. Two reviewers gave that decision its integrity, reviewing the Spanish questionnaire so respondents could answer in their native language.

Bob Kaplan, Ashland City Councilor

Bob Kaplan serves on the Ashland City Council after a three-decade career in international development, including executive roles at the Inter-American Development Bank and seven years as president and CEO of the Inter-American Foundation. He is a former Peace Corps volunteer in Paraguay and, until his election to the council in 2022, co-taught a Spanish-language class with Únete, the Center for Farm Worker and Immigrant Advocacy, preparing participants for the civics section of the US citizenship exam.

Rocio Solis, Residential Loan Officer

Rocio Solis has spent her career in banking and today helps families and business owners at Banner Bank in Medford, providing mortgage guidance and financial education in both English and Spanish. She serves on the board of Consumer Credit Counseling Service, with a focus on homeownership, access to capital for small businesses, and support for the region's Spanish-speaking community.

Editorial responsibility

This report was researched, written, and published on the authority of the principal investigator. The methodology, sources, and the tools used in research and drafting are disclosed in SOREDI Methodology, Sources, and Standards.

Publication Underwriter
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Southern Oregon Economic Conditions Index

2026 Inaugural Edition - Publication No. 01

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Medford, Oregon. The index publishes every two years, timed to inform legislative preparation ahead of each long session. The second edition is planned for 2028.

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Notes

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