

Coastal Leisure and Hospitality

Shaun Barrick, Henry Fields, and Jeff McAllister
Workforce Analysts, Oregon Employment
Department

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Your Coastal Dream Team



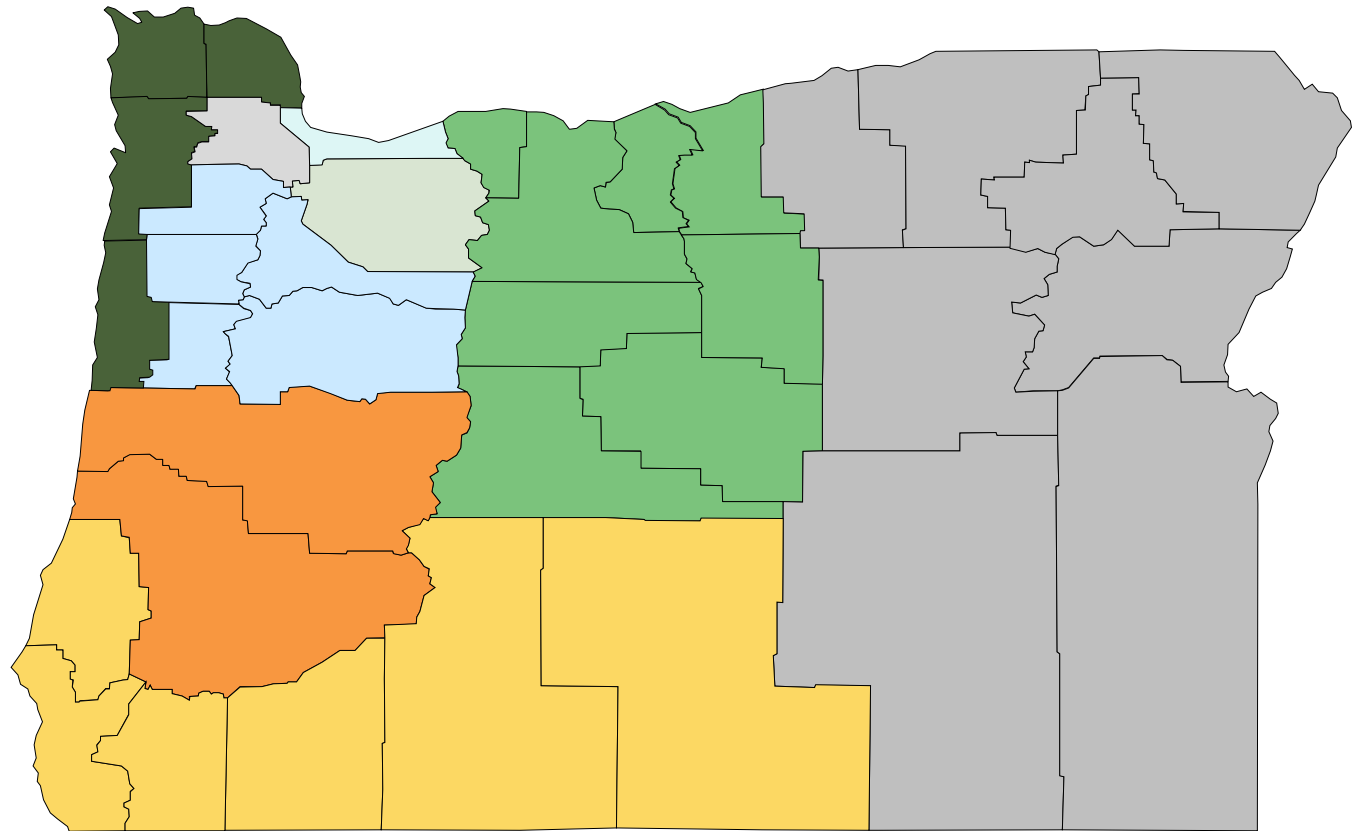
Shaun Barrick
NW OR



Henry Fields
Lane/Douglas



Jeff McAllister;
South & SW OR



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[Our Contact Information](#)

Employment levels vary across the coast

Clatsop
5,249

Tillamook
1,532

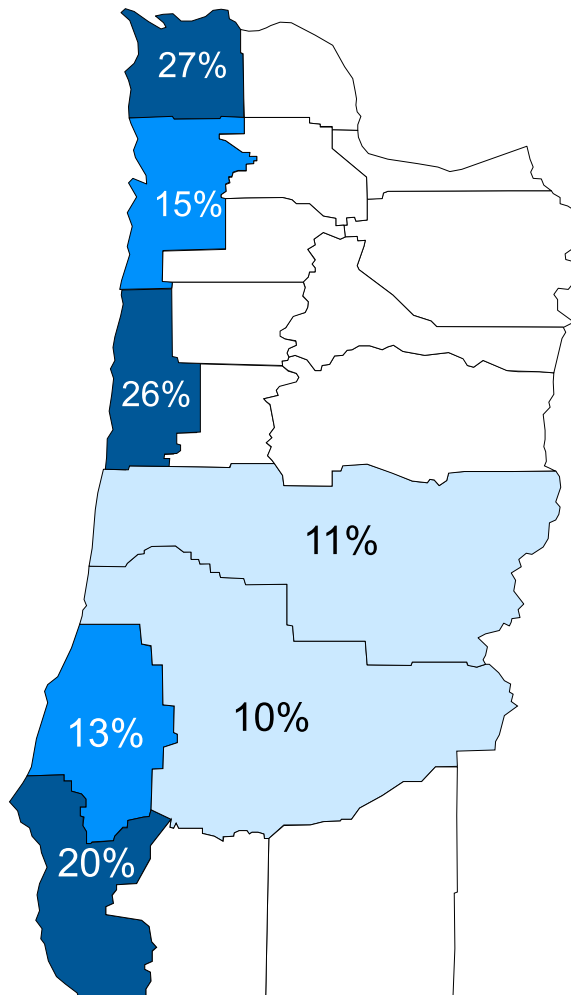
Lincoln
4,888

Lane
18,029

Douglas
3,809

Coos
3,115

Curry
1,331



Average Annual Leisure and Hospitality Employment, 2023

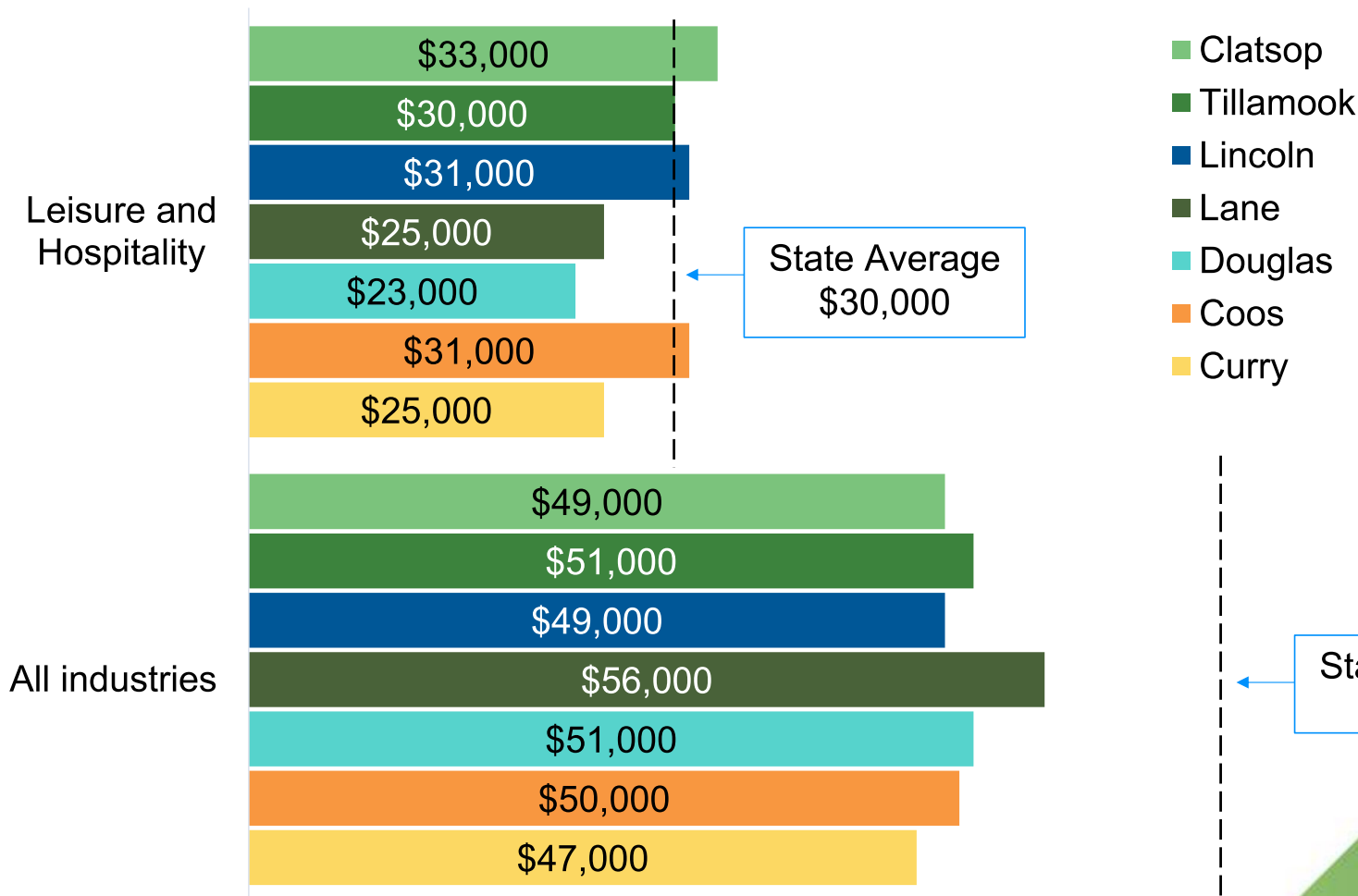
Oregon: 212,154
11% of total employment

Oregon has about the same percentage of L and H jobs as the nation, and slightly higher average wages

[Table of Location Quotients for Oregon Counties](#)

Source: Oregon Employment Department and Bureau of Labor Statistics

On average, industry and area wages are lower



- Clatsop
- Tillamook
- Lincoln
- Lane
- Douglas
- Coos
- Curry

2023 Annual Average Wages – Quarterly Census of Employment and Wages

Source: Oregon Employment Department

Data is available by geography, industry, and occupation



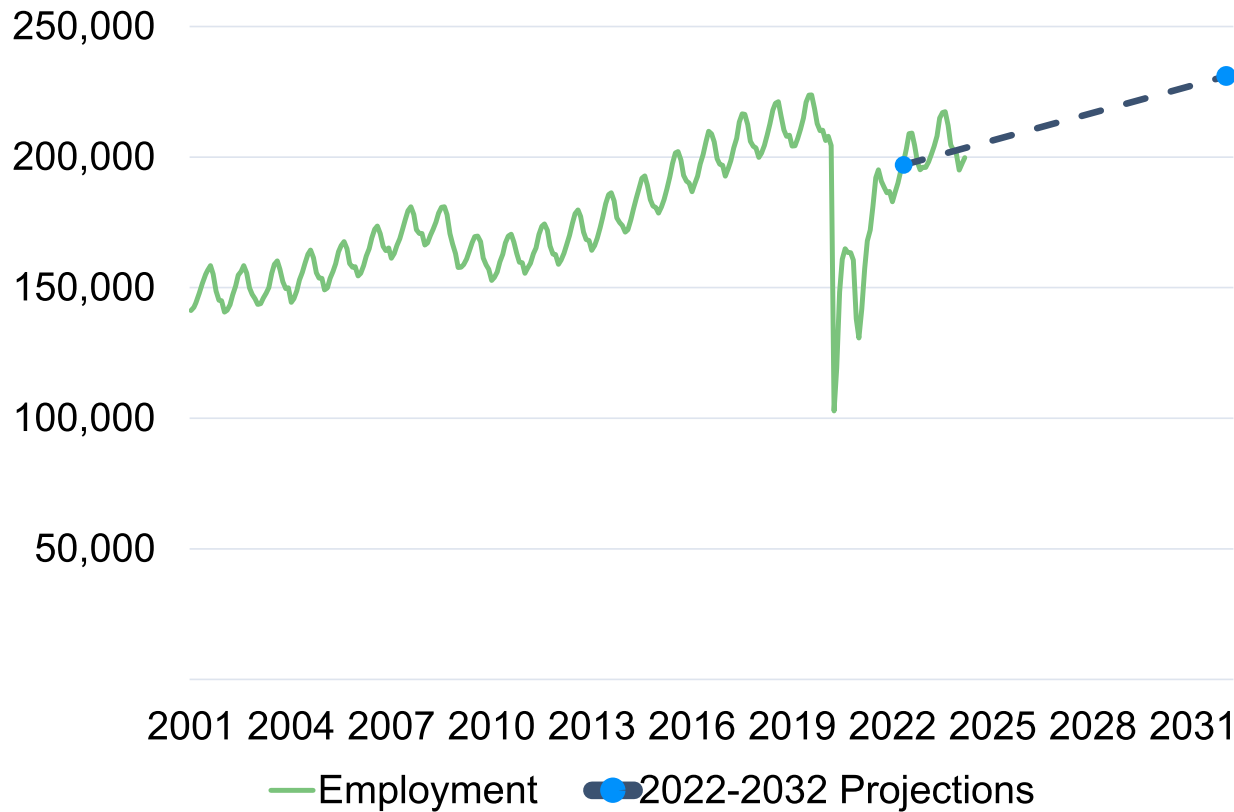
Geocoded Coastal Data (2022)

	All Industries	Leisure and Hospitality	
Establishments	9,649	1,394	14%
Employment	96,001	20,347	21%
Average Workers per Establishment	10	15	
Total Wages	\$4.7 billion	\$639 million	14%
Average Wage per Worker	\$48,713	\$31,391	

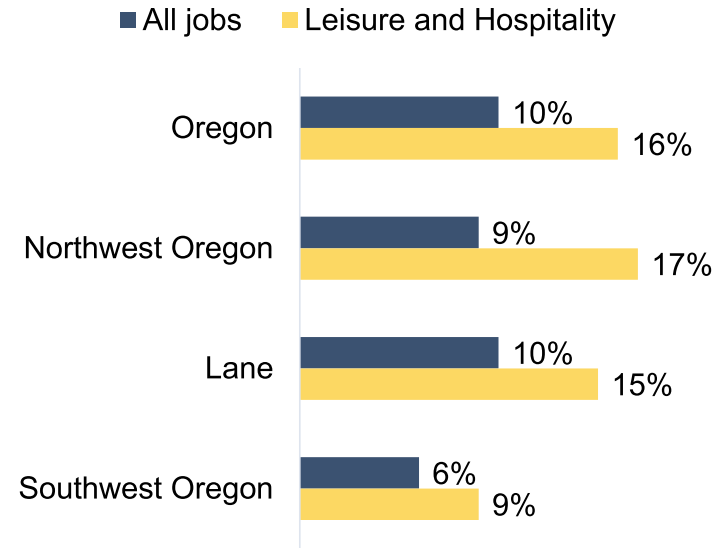
Source: Oregon
Employment
Department

L and H was hit hard in 2020, but is projected to grow quickly

Private Leisure and Hospitality Employment, Oregon



Projected Job Growth, 2022-2032



Source: Oregon Employment Department

Higher wage occupations are concentrated in management

Occupation	Total Employed in Oregon L & H	Average Annual Wage (All Sectors)
Financial Managers	133	\$164,559
Human Resources Managers	59	\$150,137
Marketing Managers	99	\$149,583
Managers, All Other	151	\$123,960
Market Research Analysts and Marketing Specialists	246	\$86,218
Business Operations Specialists, All Other	281	\$77,260
Lodging Managers	877	\$63,878
Food Service Managers	2,943	\$63,098
Meeting, Convention, and Event Planners	377	\$61,879
Chefs and Head Cooks	1,266	\$59,947

Source: Oregon Employment Department, 2024 Occupational Employment Statistics

Mid-wage (\$40-60k) tend to include generalist roles

Occupation	Total Employed	Average Annual in Oregon L & H Wage (All Sectors)
Maintenance and Repair Workers, General	1,676	\$53,103
Bookkeeping, Accounting, and Auditing Clerks	828	\$52,287
Light Truck or Delivery Services Drivers	128	\$50,599
First-Line Supervisors of Housekeeping and Janitorial Workers	421	\$50,072
Shipping, Receiving, and Traffic Clerks	146	\$46,862
Customer Service Representatives	114	\$46,792
First-Line Supervisors of Food Preparation and Serving Workers	11,866	\$46,715
Office Clerks, General	756	\$46,668
Security Guards	438	\$45,041
Landscaping and Groundskeeping Workers	443	\$43,501

Source: Oregon Employment Department, 2024 Occupational Employment Statistics

There's a broad base of lower wage occupations

Occupation	Total Employed in OR L & H	Average Annual Wage (All Sectors)
Cooks, Restaurant	19,014	\$39,174
Cooks, Short Order	1,019	\$37,439
Maids and Housekeeping Cleaners	6,138	\$37,420
Food Servers, Nonrestaurant	545	\$37,349
Food Preparation Workers	1,810	\$37,308
Bartenders	7,258	\$36,031
Cashiers	1,905	\$35,523
Waiters and Waitresses	21,768	\$35,300
Dishwashers	5,734	\$35,300
Dining Room and Cafeteria Attendants and Bartender Helpers	2,561	\$33,044

Source: Oregon Employment Department, 2024 Occupational Employment Statistics

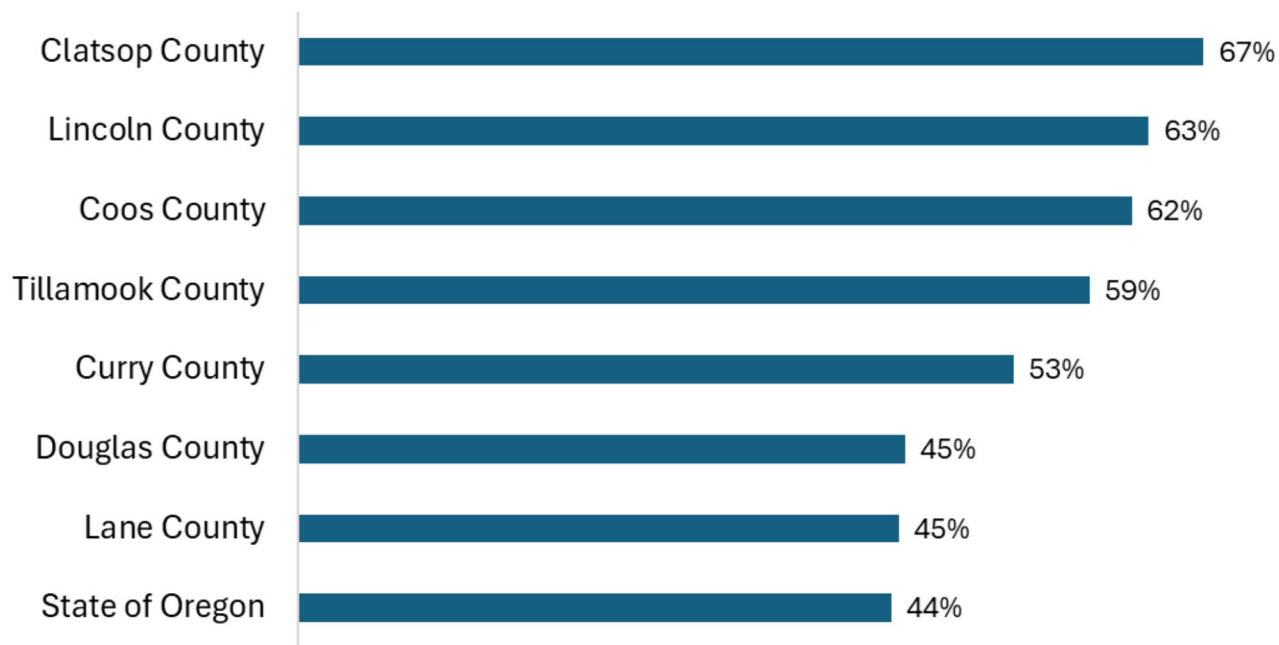
**WHAT CAN WAGES, TRAVEL
SPENDING, AND FIRM
LEVELS TELL US ABOUT THE
RELATIVE IMPORTANCE OF
LEISURE AND HOSPITALITY
ON THE COAST?**

SHAUN BARRICK, WORKFORCE ECONOMIST, NORTHWEST OREGON

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L&H PAID HIGHER WAGES IN AREAS WITH GREATER RELIANCE ON L&H

Leisure and Hospitality Wage as Percent of All Industry Average Wage (2023)



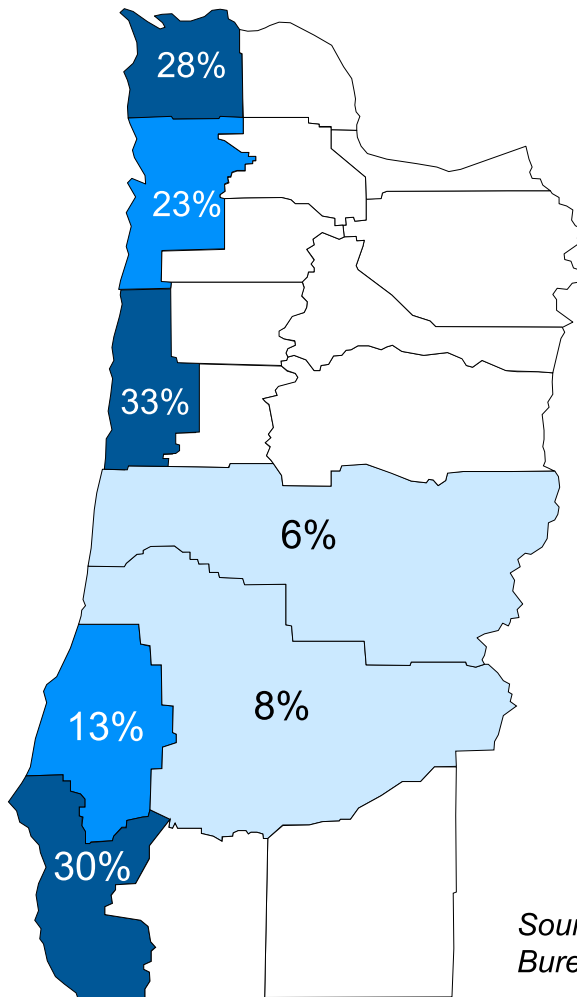
Source: Oregon Employment Department

Counties that have more jobs in L&H have proportionally higher wages in L&H

Put another way, L&H pays 56% less than the average job across the state, but in Clatsop County, L&H only pays 33% less than the average wage across the county

Why? Tourism, proximity to urban centers, but the simple answer is higher demand leads to higher wages

Travel spending disproportionately important to Coast



Travel Spending as a percent of GDP (2022):
In Oregon?

5%

In Lincoln County?

33%

	Total Travel Spending	GDP (2017 dollars)
Clatsop	\$ 561	\$ 1,989
Tillamook	\$ 265	\$ 1,171
Lincoln	\$ 670	\$ 2,014
Lane	\$ 1,000	\$ 17,551
Douglas	\$ 295	\$ 3,823
Coos	\$ 303	\$ 2,407
Curry	\$ 214	\$ 702

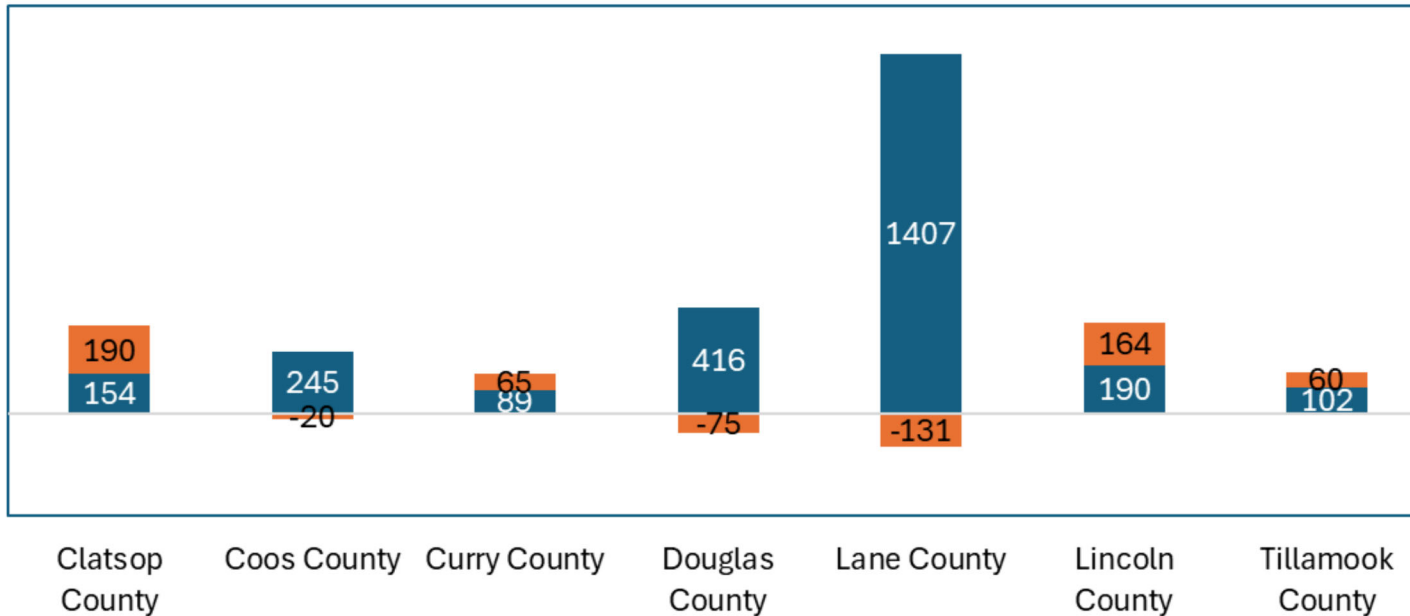
All Figures in Millions of Dollars

Source: Oregon Employment Department, Dean Runyon, U.S. Bureau of Economic Analysis

COUNTIES WITH MOST L&H HAVE MORE FIRMS PER CAPITA

Total L&H Firms Separated by Population Estimate and "Extra" Tourism Amount

■ Estimated Firms ■ "Extra" Firms



Source: Oregon Employment Department, PSU Population Research Center

- At the state level: 1 firm for every 273 people
- Blue Section is the number of firms each county would have in L&H if that ratio held
- Orange Section is the difference between the real number of firms and the population-based estimate (If you add both bars you get the real number of firms)
- One explanation for the orange firms is tourism

PUTTING IT ALL TOGETHER...

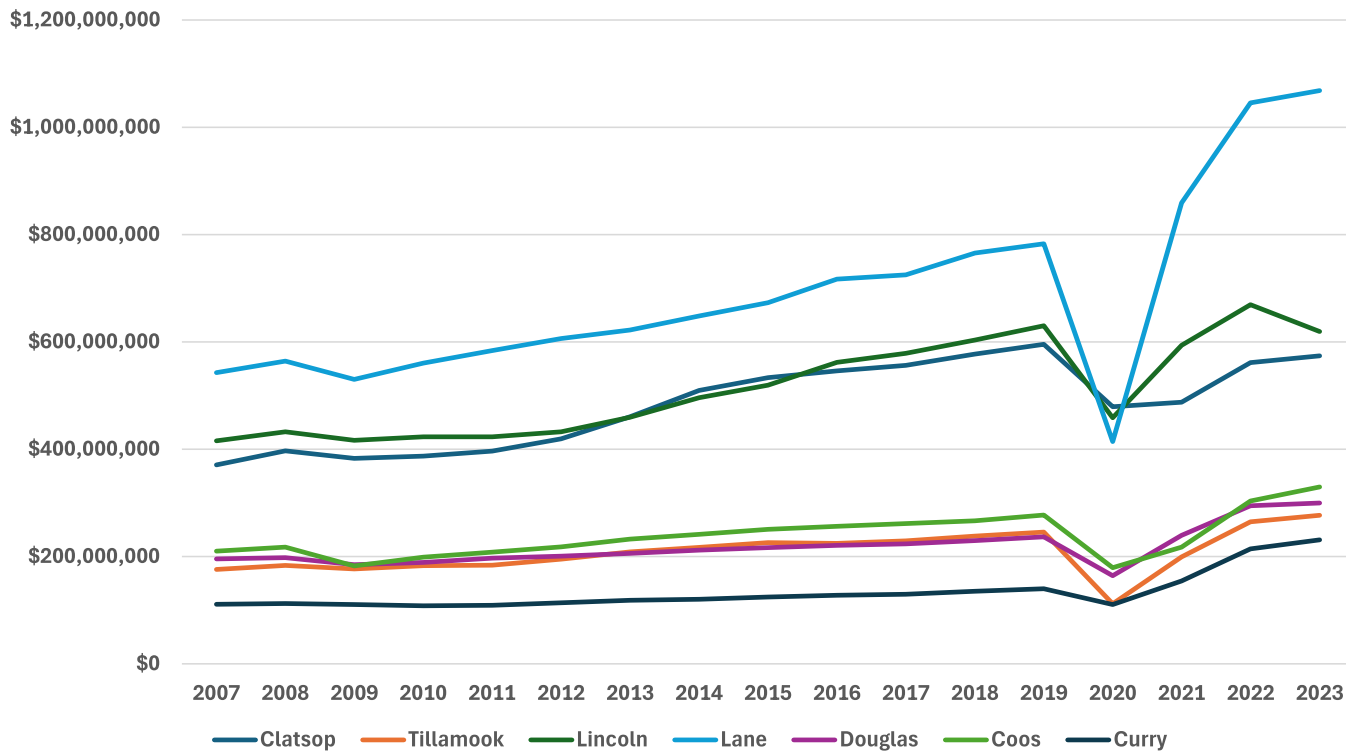
- There are higher relative wages in areas with higher relative travel spending
- There are more firms per capita in areas with higher relative travel spending
- One explanation is more competition = more demand for workers = higher paying jobs

TOURISM IMPACT

Travel Spending & Local Tax Revenue

LINCOLN AND CLATSOP TRADE PLACES WITH DIVERGENCE IN 2020

Total Direct Travel Spending
Destination Spending

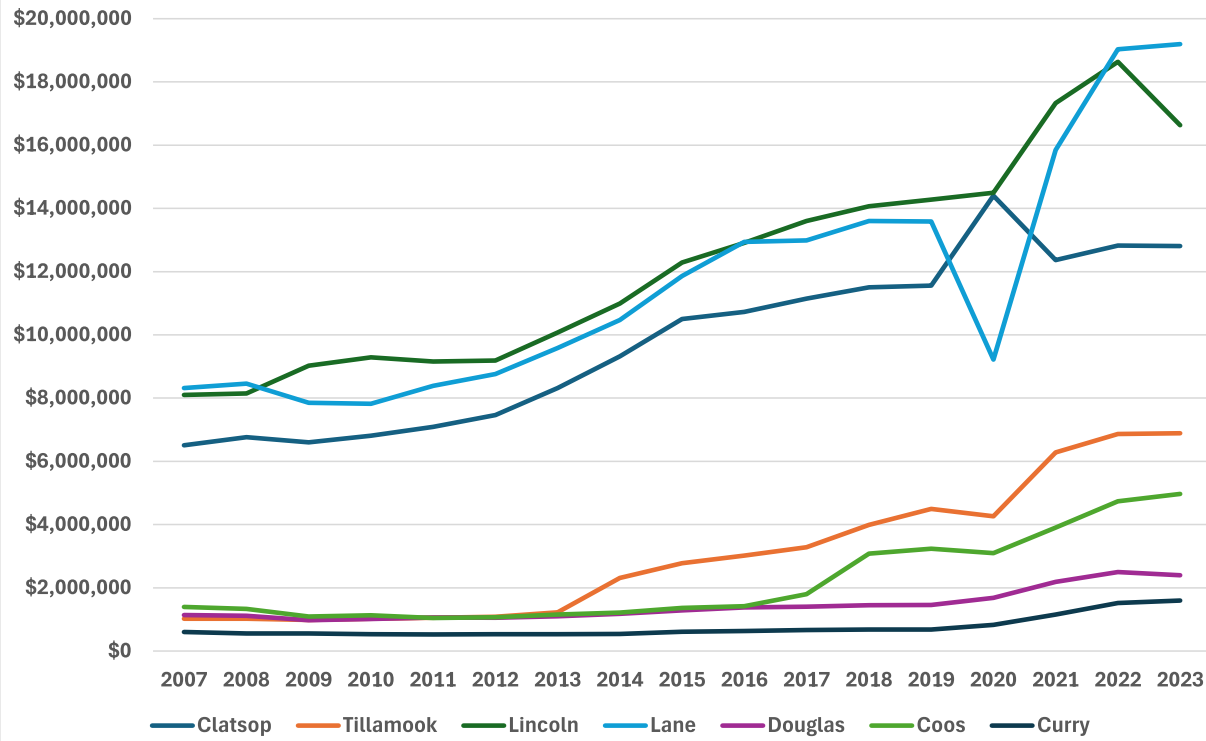


Lane County exceeding projected direct travel spending post-pandemic. Lincoln recovered in by 2022 but has since slipped. Clatsop spending hasn't recovered since the pandemic.

Source: Travel Stats, Dean Runyan Associates

SEVERAL COUNTIES BEGAN TO SEE INCREASES STARTING IN 2013

Local Tax Receipts
Generated by Travel Spending

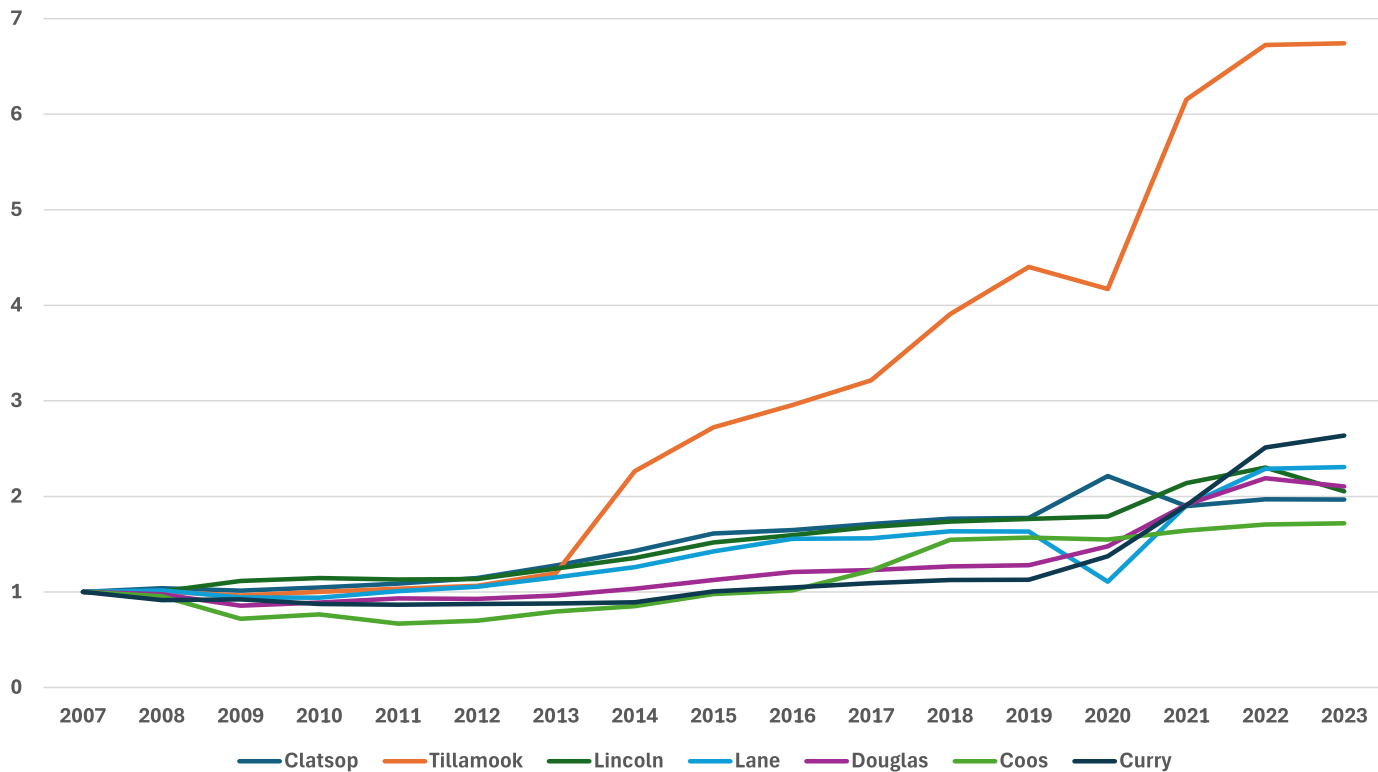


Lincoln tax receipts witnessed a substantial bump in 2020. Lane receipts fell to 2013 levels then rebounded. Clatsop receipts jumped in 2020 then returned to pre-pandemic trajectory.

Source: Travel Stats, Dean Runyan Associates

TILLAMOOK COUNTY LOCAL TAX RECEIPT VELOCITY TAKES OFF IN 2013

Index of Local Tax Receipts

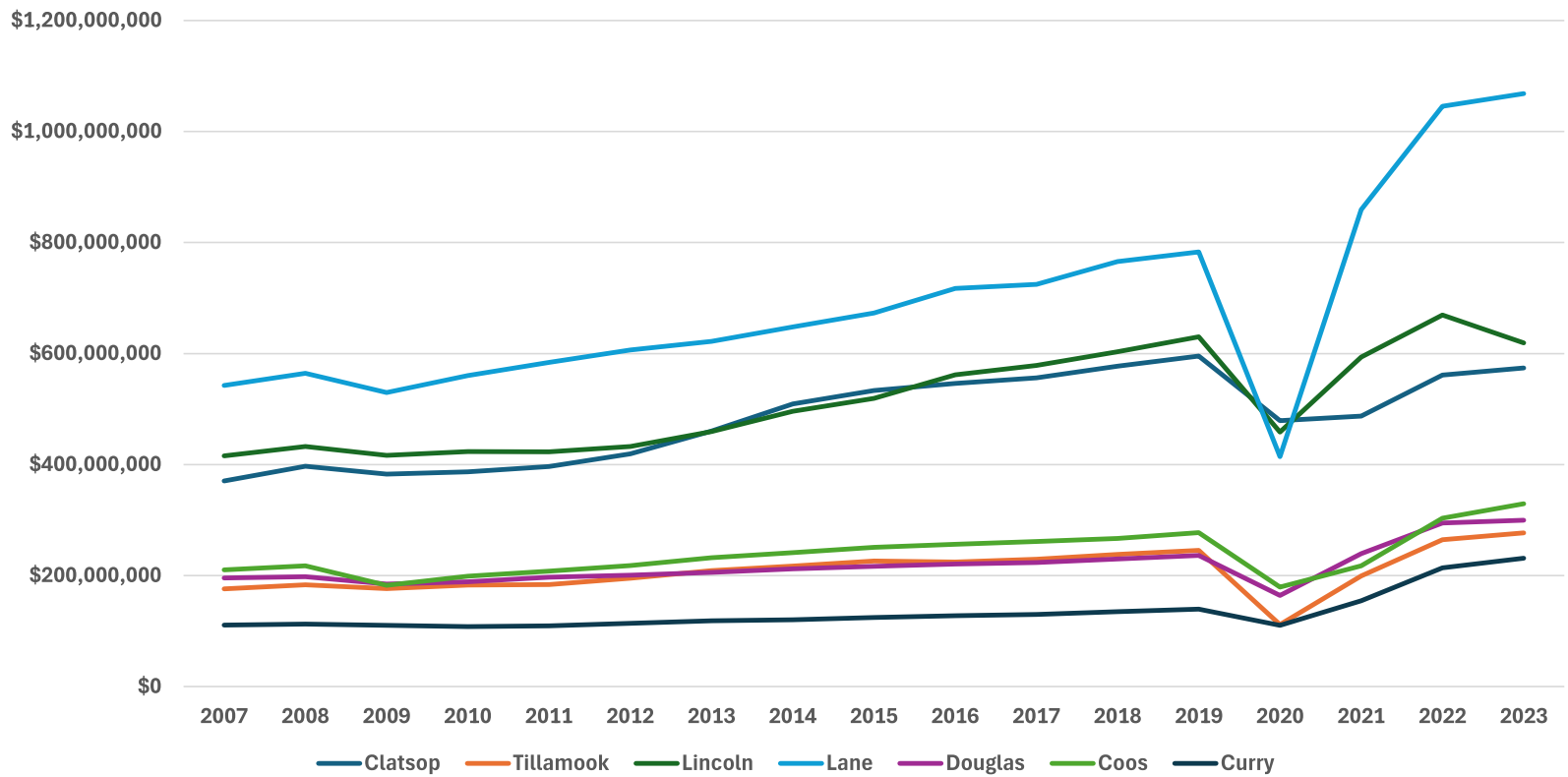


Indexed for 2007 dollars. Tillamook stands out for collecting nearly seven times the amount of tax dollars as in 2007. All other counties hover around twice the amount.

Source: Travel Stats, Dean Runyan Associates

LINCOLN AND CLATSOP OFF TRACK FROM PROJECTED SPENDING PRIOR TO PANDEMIC

Visitor Spending on Commodities

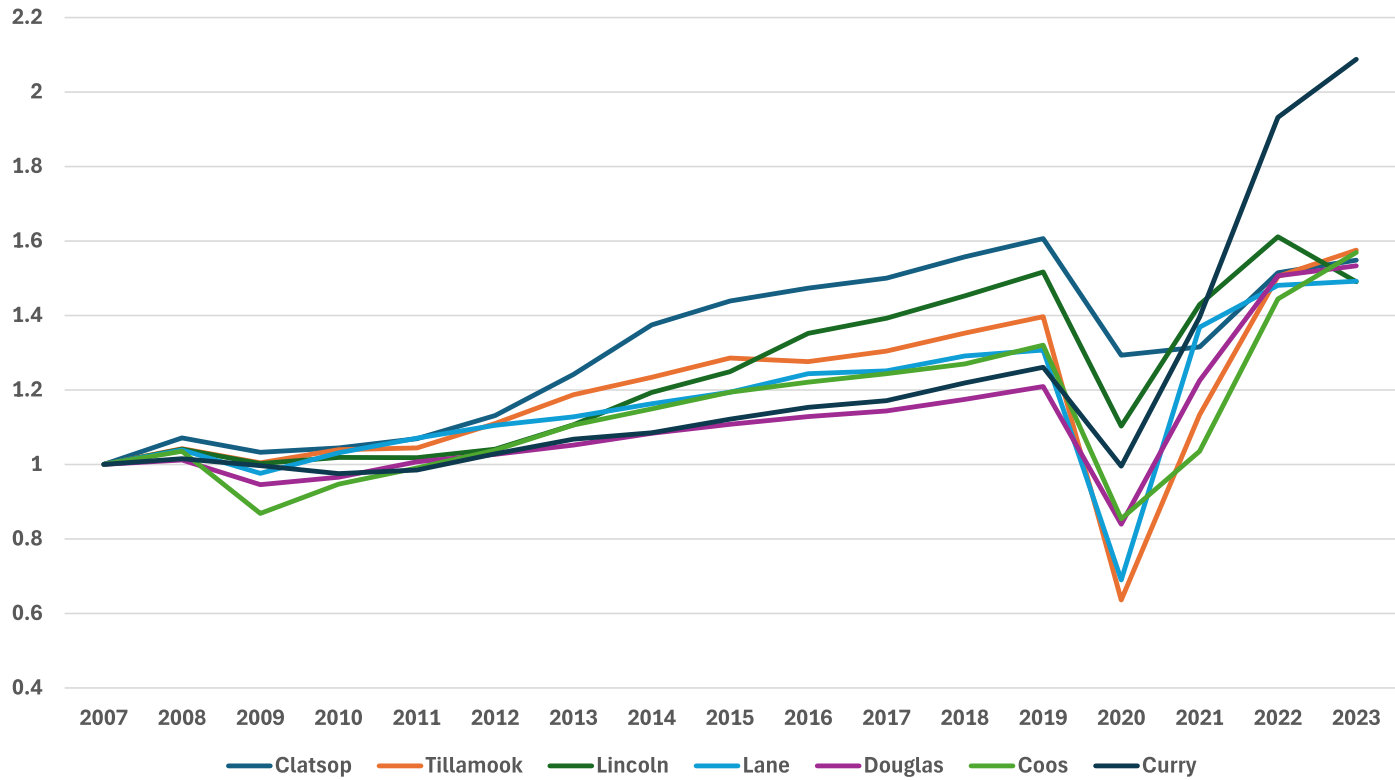


Accommodations and food service account for around 50%-70% of spending depending on the county. After adding arts, entertainment, and recreation this increases to 60%-80%.

Source: Travel Stats, Dean Runyan Associates

CURRY COUNTY COMMODITY SPENDING REBOUNDED AFTER THE PANDEMIC

Index of Visitor Spending on Commodities



Indexed for 2007 dollars. Curry County visitors are spending more than twice what they did in 2007. This index shows how severe the negative impact to spending was for certain counties.

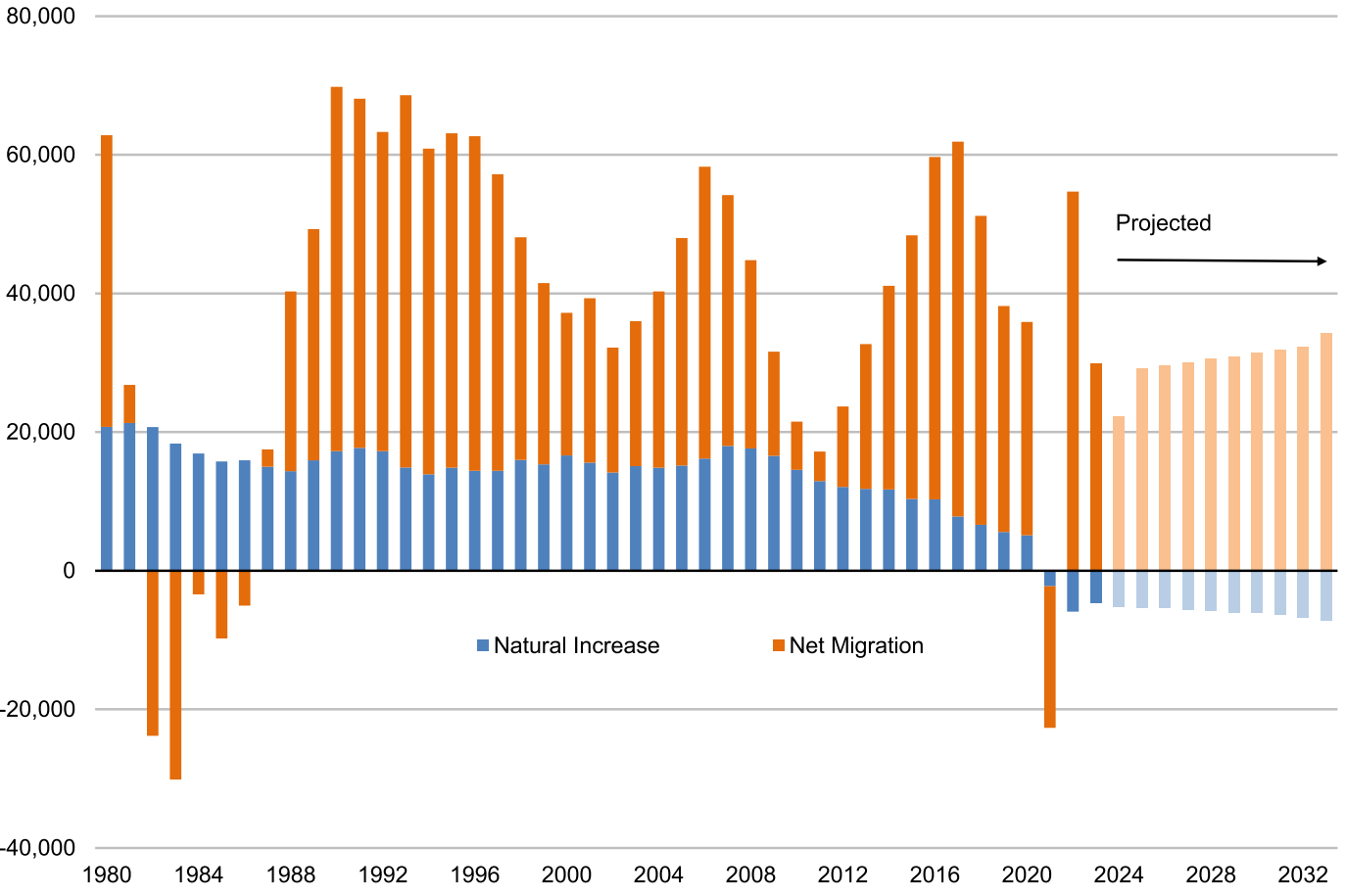
Source: Travel Stats, Dean Runyan Associates

WORKFORCE MIGRATION

State to State, County to County

SLOWING LABOR FORCE GROWTH: SLOWER POPULATION GROWTH

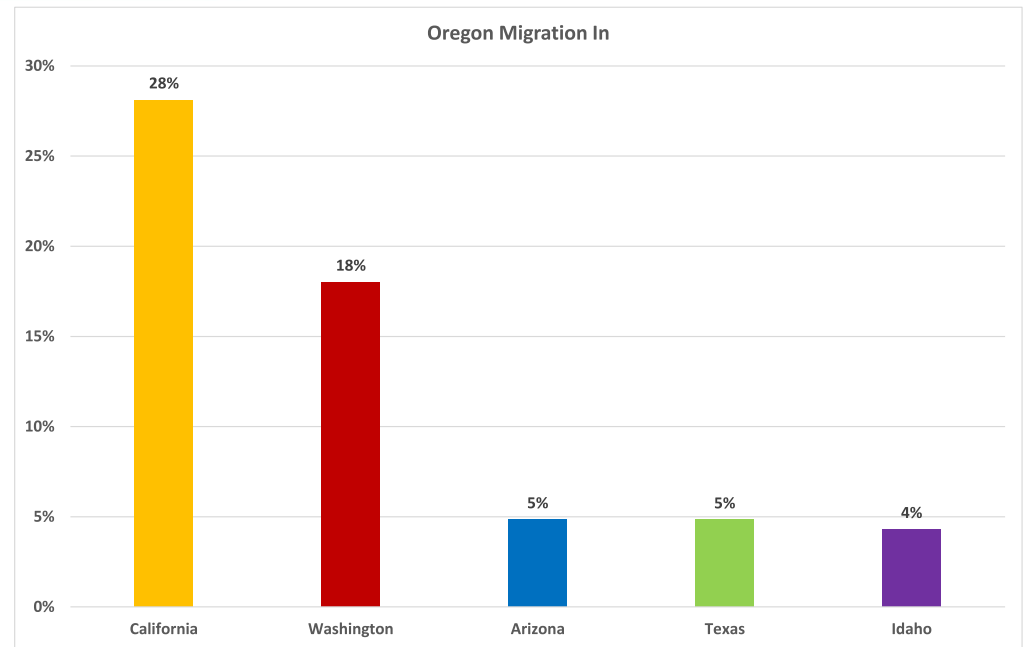
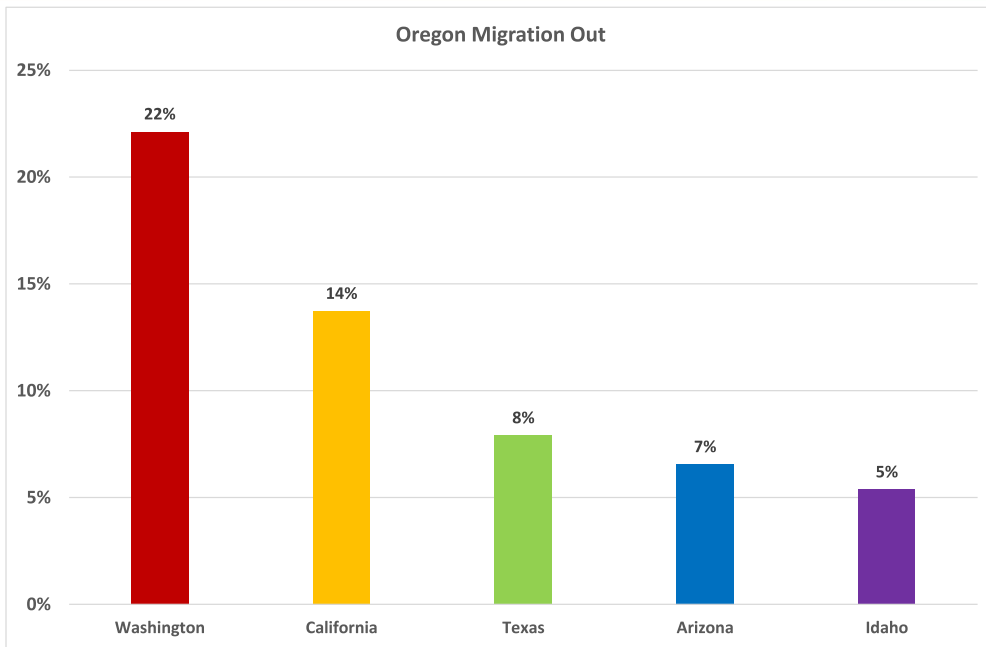
Oregon's Population Components of Change



Source: Oregon Employment Department, Oregon Office of Economic Analysis

Portland State University estimates show a rebound in 2022, but population growth is projected to be slower in the coming years than historical norms.

OREGON MIGRATION 2021-2022



Source: Internal Revenue Service

Oregon trades individuals most with California and Washington with a net gain from California and a net loss to Washington. Oregon loses more individuals than it gains from Texas, Arizona, and Idaho.

COASTAL MIGRATION 2021-2022

Douglas, Coos, and Lincoln drove increases with net gains of 1.4%, 1.1% and 1% respectively. Lane was the only county that experienced a net loss. Clatsop, Tillamook, and Curry witnessed modest gains. Across all seven counties there was a net gain of less than 2,000 individuals with an average increase of 0.6%.

Individual Income Tax Returns: County-to-County Migration Inflow for Selected Income Items, Calendar Years 2021-2022										
County	Non-Migrants		Inflow		Outflow		Net		% Change	
	Returns	Individuals	Returns	Individuals	Returns	Individuals	Returns	Individuals	Returns	Individuals
Clatsop County	15,421	28,950	1,489	2,452	1,480	2,440	9	12	0.1%	0.0%
Tillamook County	10,273	19,722	856	1,453	851	1,417	5	36	0.0%	0.2%
Lincoln County	18,748	34,213	1,947	3,203	1,729	2,872	218	331	1.2%	1.0%
Lane County	144,628	266,186	8,991	13,793	8,977	13,944	14	-151	0.0%	-0.1%
Douglas County	40,103	78,987	2,743	4,825	2,209	3,731	534	1,094	1.3%	1.4%
Coos County	23,491	44,255	1,875	3,182	1,580	2,679	295	503	1.3%	1.1%
Curry County	9,057	16,273	839	1,431	819	1,353	20	78	0.2%	0.5%

Source: Internal Revenue Service

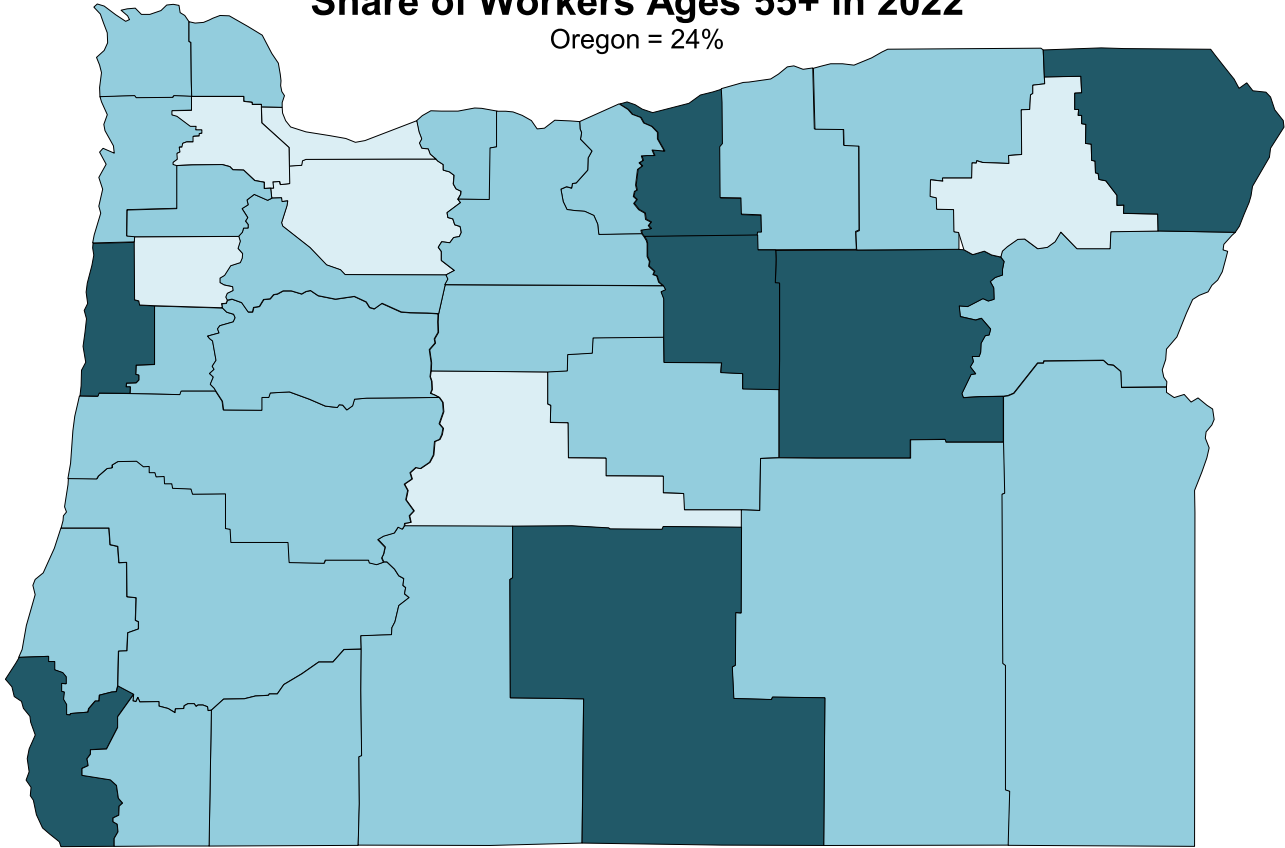
WORKFORCE DEMOGRAPHICS

Implications of an Aging Workforce

THE WORKFORCE CONTINUES AGING, IN OREGON AND ACROSS THE U.S.

Share of Workers Ages 55+ in 2022

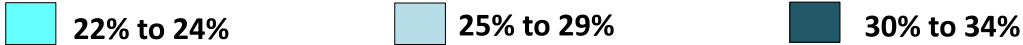
Oregon = 24%



Rural counties tend to have higher shares of workers who may be nearing retirement in the coming years.

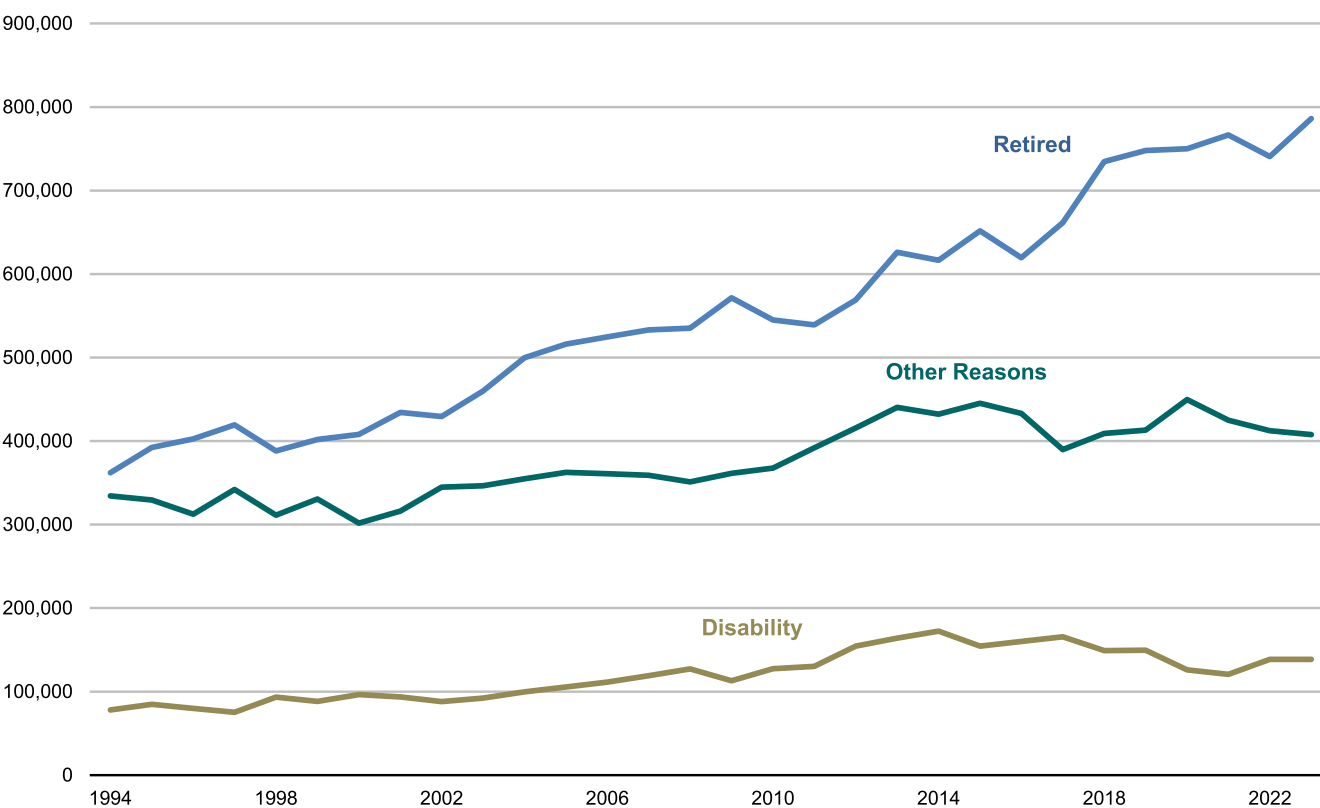
Lincoln and Curry counties have a higher share of workers that are 55+ years old.

Source: Oregon Employment Department



SLOWING LABOR FORCE GROWTH: MORE RETIREMENTS

Reasons Oregonians Ages 16+ are Not in Labor Force Annual Average, 1994-2023



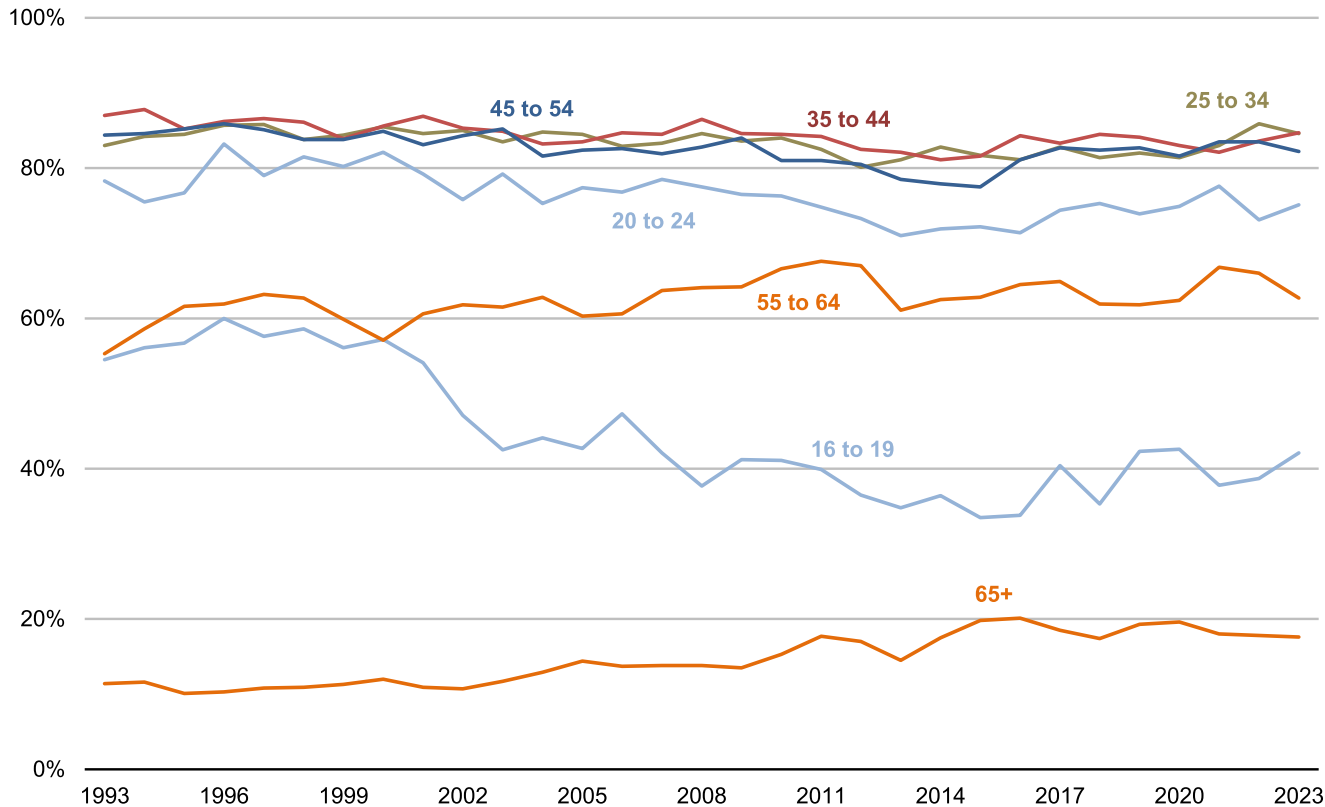
Not in Oregon's labor force due to retirement:

- Up 5% since 2019
- Rose by 26% over the past decade

Source: Oregon Employment Department, Local Area Unemployment Statistics

LABOR FORCE PARTICIPATION RATES VARY WIDELY BY AGE CATEGORY

Oregon Labor Force Participation Rates by Age Category, 1993 - 2023



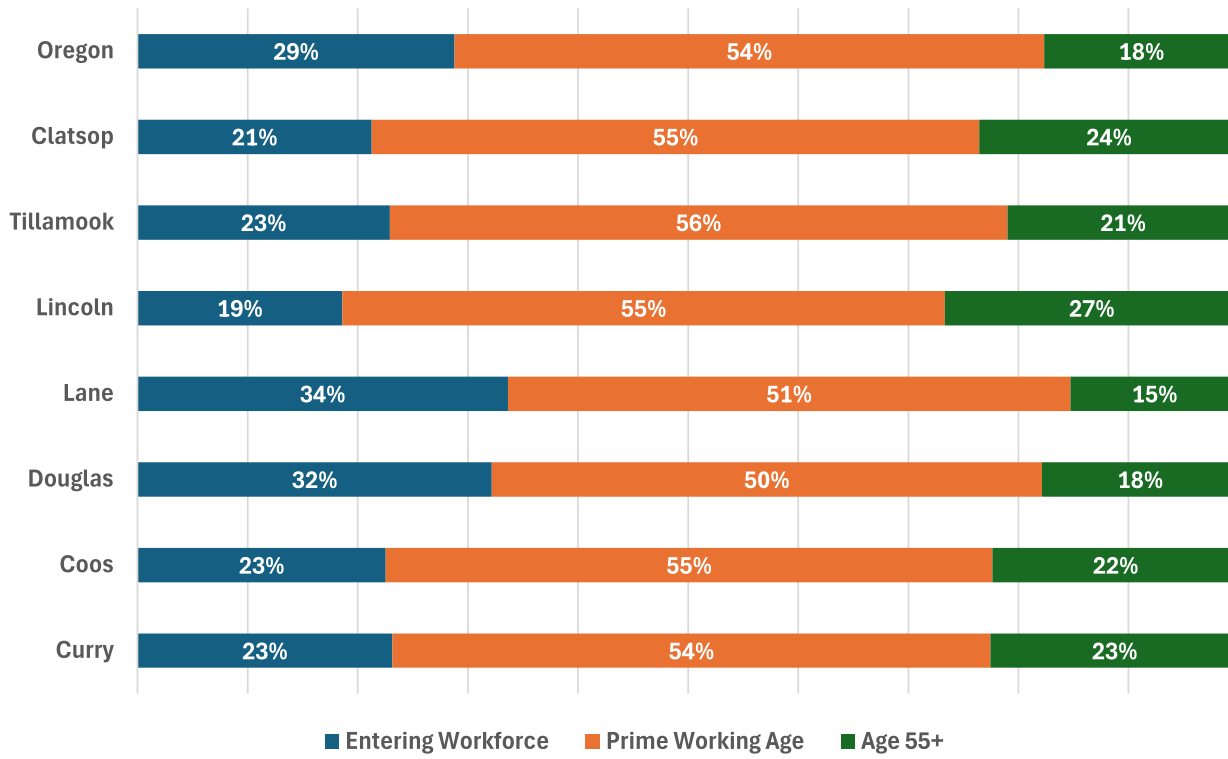
Participation rate rebounding slightly for teens, but well below historic highs.

The rate doubled for those 65 years and older over the past decade.

Source: Oregon Employment Department, Local Area Unemployment Statistics

AGE DEMOGRAPHICS

Leisure & Hospitality Age Demographics



15-27% of the leisure and hospitality workforce could be within 10 years of retirement. Lane and Douglas counties skew slightly younger relative to Oregon and the rest of the coast. Lincoln County skews older. 50% or more of the workforce falls within the prime working age demographic of 25-54 years of age.

Source: U.S. Census Bureau