

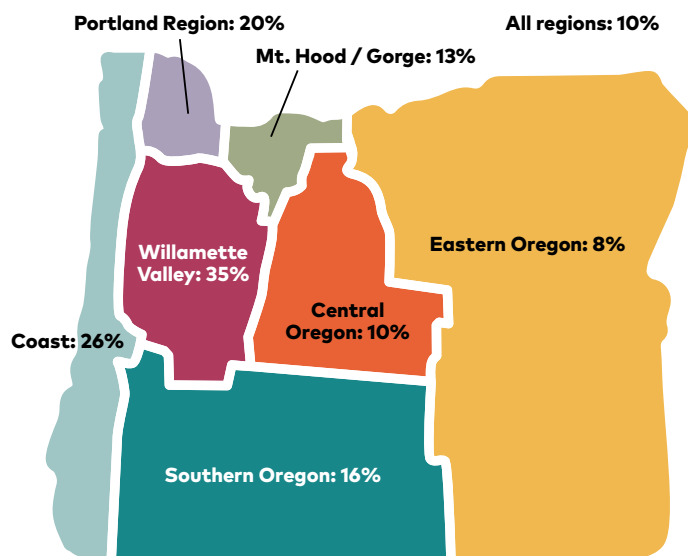
OREGON TOURISM WORKFORCE ASSESSMENT

In 2019, Travel Oregon hired ECONorthwest and Program and Policy Insight to conduct a workforce assessment of Oregon's tourism industry to help gain a better understanding of employment trends, stakeholders' perceptions of, and experiences in, the industry, and ultimately support the needs of the industry workforce. The study was completed in early 2020.

The information collected speaks to conditions in Oregon's travel and tourism industry during good economic times, though we know much has changed. Through this research, there is an opportunity to assess the effects of the social justice movement, increasingly catastrophic wildfire seasons and the COVID-19 pandemic in order to devise ways to support current workforce needs and address persistent issues, work to create a more equitable tourism industry, and help guide economic recovery efforts following the 2020 wildfire season and COVID-19 pandemic.

The survey yielded just over 700 complete or usable responses—about 60% from employers and 40% from employees across tourism sectors and regions of the state.

Industry Survey Responses By Geography



Primary findings from the assessment:

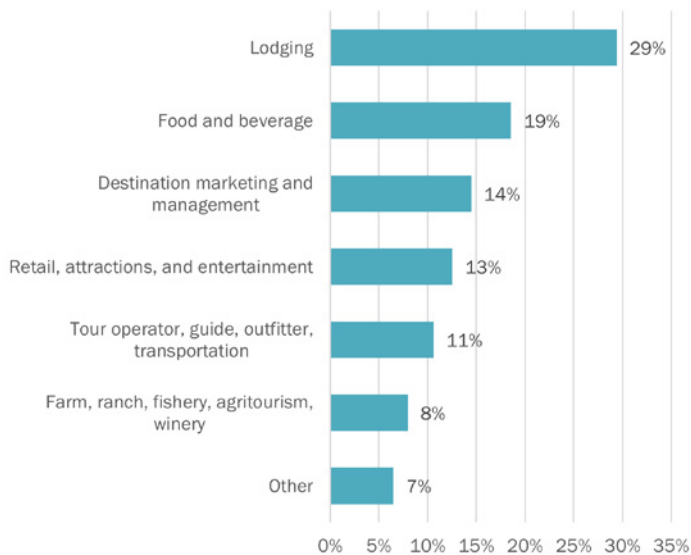
- The employment and wage data analyzed for this study present an industry characterized by significant seasonality in employment and dominated by occupations requiring relatively little formal education and with relatively low wages. These characteristics align with the perceptions of employers and employees in the tourism industry.
 - The Portland Region and neighboring Hood-Gorge and Willamette Valley regions, for example, have much smaller summer-to-winter drops in employment—under 10%—compared to the statewide tourism industry average of 13% and to much higher rates of 15-21% in the other regions.
- Most employers indicated their organization is a seasonal business (74%).
- 62% of employers reduce employee hours and 58% of employers adjust employee numbers during low season.
- The majority of employers believe seasonality affects their ability to find (70%) and retain (63%) qualified employees.
- Word of mouth is the most prevalent means of advertising for and finding jobs.
- Accommodation and food services is the industry with the most tourism employees in Oregon as well as the largest share of employment attributable to tourism (34%).
- Estimated tourism employment in Oregon has increased steadily over time, from 75,170 in 2012 to 89,079 in 2017, representing annual growth of 3.2% per year, consistent with employment growth for all industries combined.
- The tourism industry lacks clear career pipelines, and needs to build and market a more formal way to attract employees.
- Most employers indicated their firm has paid for employee training; employees were less likely to report they received paid training.
- Increasing pay was the top retention strategy identified by employers and employees.

Characteristics of participants in the assessment:

Employers

- 64% worked in private organizations and 87% worked for non-profit organizations.
- Employer respondents tended to work for small organizations. Half of employer organization were 9 employees or less, and 37% were between 10 and 99 employees.
- 94% were white, with 3% each reporting race as multiracial, Asian, or other race. Approximately half reported annual salaries between \$50,000 and \$99,999. 20% earned more than \$100,000 and 9% made less than \$25,000.
- 70% held a bachelor's or graduate degree.
- Age of respondents was varied.
- 67% were female.

Employer Survey Responses By Sector

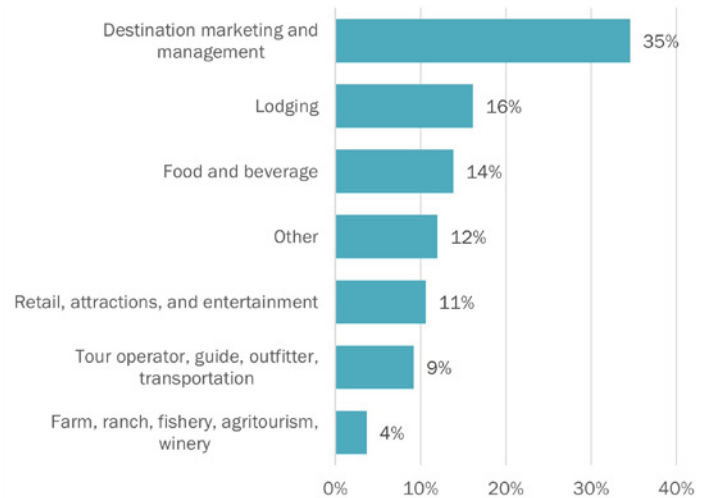


Employees:

- 30% worked in tourism for less than 2 years, or more than 10 years.
- 73% were full-time, year-round employees, 15% worked year-round, part-time, and 11% were seasonal employees.
- 50% reported annual incomes between \$35,000 and \$74,999.
- 9% of employee respondents earning less than \$25,000 — among these respondents, 37% were full-time year-round employees, 10% were full-time seasonal workers, 47% were part-time year-round workers, and 7% were part-time seasonal workers.

- 90% were white, 10% were Latino.
- 2/3 had a bachelor's or graduate degrees.
- 52% were between 30-50 years old, 16% were under 30 and 30% were over 50.
- 75% were female.

Employee Survey Responses By Sector



Read the full Oregon Tourism Workforce Assessment and set of recommendations that has emerged from this assessment at: <https://industry.traveloregon.com/resources/research/2020-oregon-tourism-workforce-assessment>