

Oregon's Tourism & Creative Services Cluster

Oregon's Tourism & Creative Services sectors are relatively smaller than in the rest of the U.S. and grew less than most other sectors. Accommodations and Food Services sector in Oregon is not particularly different from that in the U.S. It pays low wages and grew at a slower pace. Arts, Recreation, and Entertainment sector in Oregon has been and continues to be smaller than in the rest of the U.S., though it has grown at a similar pace. Design and Media sector lags behind the national average and is shrinking.

Tourism & Creative Services Cluster Performance Metrics

Oregon's industry cluster performance relative to the United States

Tourism & Creative Services	Oregon		U.S.		Competitiveness Relative to U.S.
	2019	Annual Growth since 2007	2019	Annual Growth since 2007	
Employment	261,302	1.3%	20,988,355	0.9%	Higher
Establishments	18,367	1.2%	1,183,110	1.0%	Higher
Average Wage	\$29,141	2.4%	\$35,103	1.8%	Higher
R&D (in Millions, annual) ¹	\$126	30.1%	\$29,878	20.7%	Higher
Patents (estimated, annual) ²	126	13.7%	5,662	11.7%	Higher
Location Quotient	0.96				
Projected 10-Year Employment Growth	11.8%				

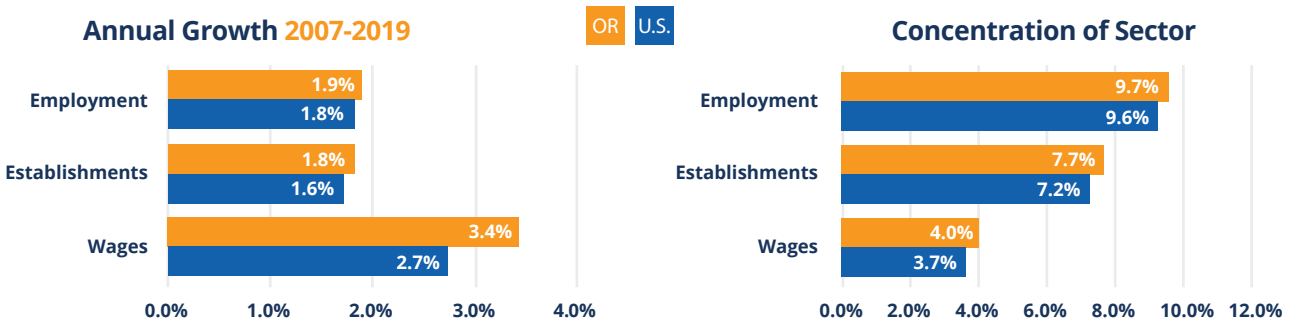
¹ Research and development paid for and performed by companies in 2017 and growth since 2011.

² Estimate of patents granted in 2017 based on 2007 to 2015 data and growth since 2007.

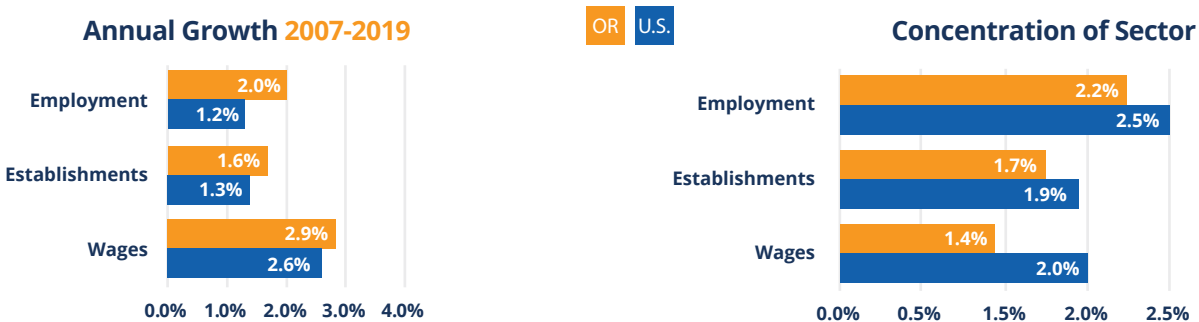
Note: A Location quotient (LQ) measures the concentration or specialization of an industry compared to a larger geography. For these handouts, we compare Oregon's economic clusters and subclusters to the United States. An LQ is calculated by taking the region's share of an economic indicator (jobs, wages, establishments, etc.) relative to the share of that indicator in the larger geography.

Sector Snapshot

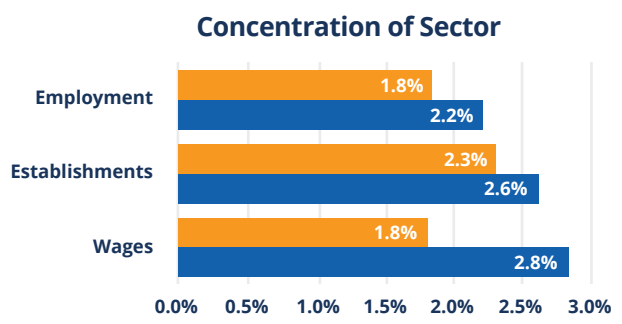
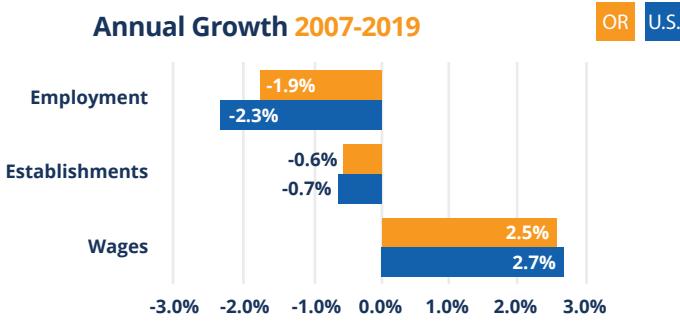
Accommodation & Food Service	Oregon		U.S.		Competitiveness Relative to U.S.
	2019	Annual Growth since 2007	2019	Annual Growth since 2007	
Employment	185,710	1.9%	14,144,424	1.8%	OnPar
Establishments	12,063	1.8%	727,609	1.6%	Higher
Average Wage	\$22,783	3.4%	\$22,613	2.7%	Higher
Location Quotient	1.01				
Projected 10-Year Employment Growth	12.7%				



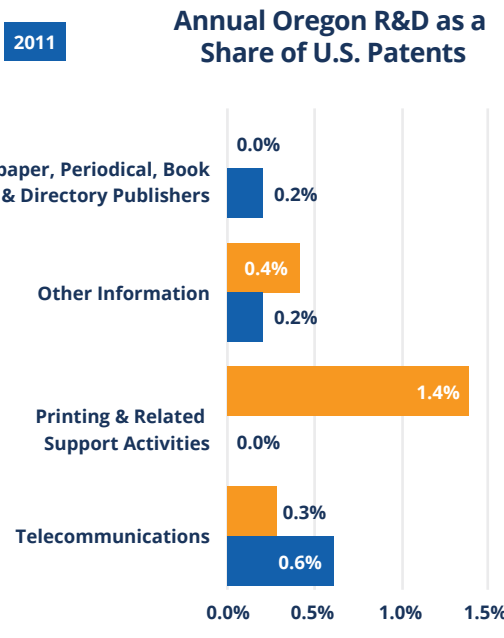
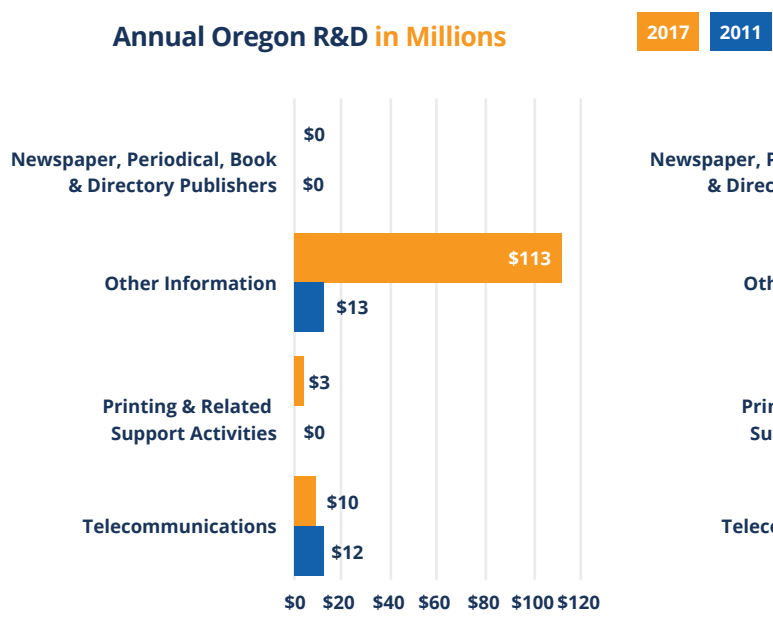
Arts Entertainment & Recreation	Oregon		U.S.		Competitiveness Relative to U.S.
	2019	Annual Growth since 2007	2019	Annual Growth since 2007	
Employment	41,733	2.0%	3,657,005	1.2%	Higher
Establishments	2,712	1.6%	195,316	1.3%	Higher
Average Wage	\$34,854	2.9%	\$47,845	2.6%	Higher
Location Quotient	0.88				
Projected 10-Year Employment Growth	15.7%				



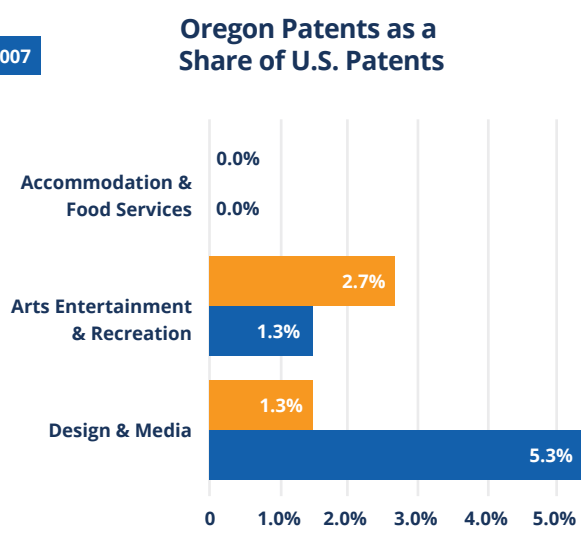
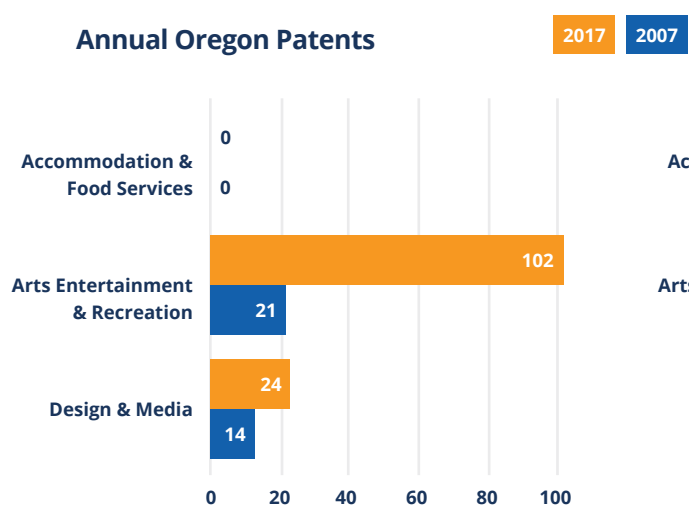
Design & Media	Oregon		U.S.		Competitiveness Relative to U.S.
	2019	Annual Growth since 2007	2019	Annual Growth since 2007	
Employment	33,859	-1.9%	3,186,926	-2.3%	Higher
Establishments	3,592	-0.6%	260,185	-0.7%	On Par
Average Wage	\$56,972	2.5%	\$75,918	2.7%	Lower
Location Quotient	0.82				
Projected 10-Year Employment Growth	-7.8%				



R&D in Design and Media



Patents by Sector



Sources:

U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), 2007 and 2019.
 Oregon Employment Department, Oregon Industry Employment Forecast, 2017-2027.
 National Science Foundation (NSF), Business Enterprise Research and Development Survey (BERD), 2011 and 2017.
 U.S. Patent and Trademark Office, Patent Technology Monitoring Team (PTMT), Patenting by Geographic Region (State and Country), 2007 to 2015.