



PORTLAND
BUSINESS ALLIANCE

VALUE OF JOBS COALITION

Oregon: The State of Sport

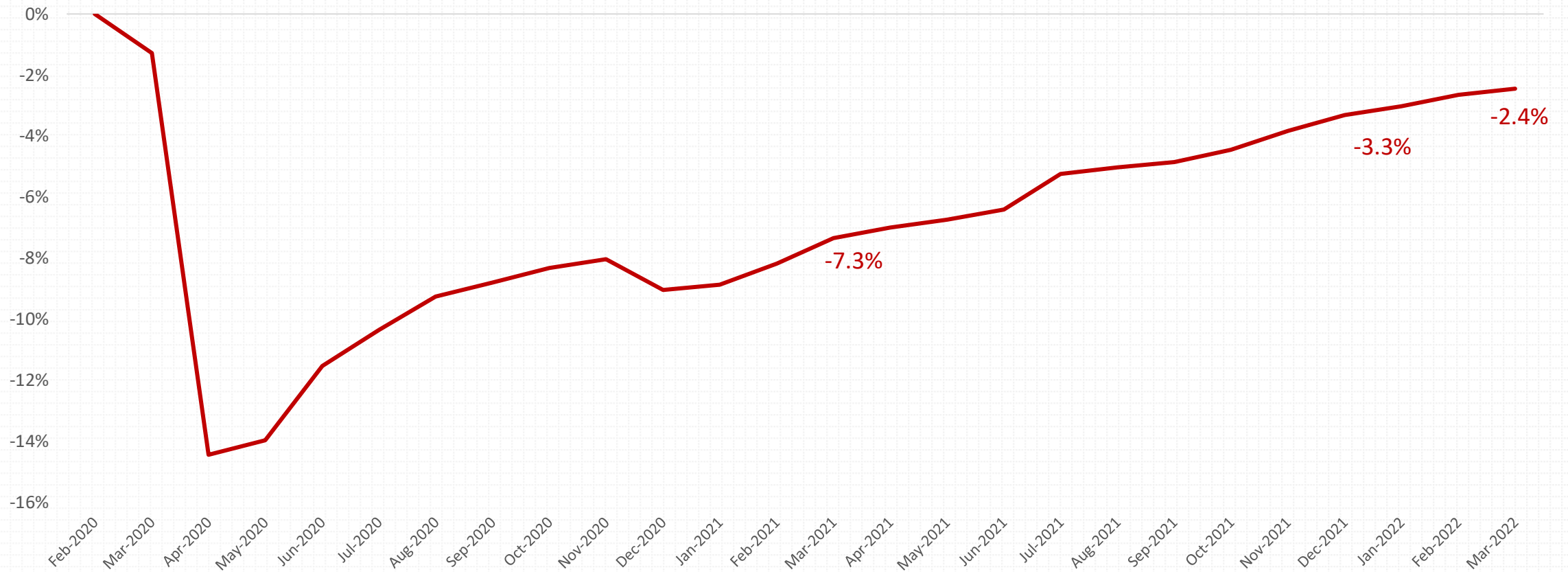
ECONOMIC REPORTS

This coalition has a track record of producing thoughtful economic analyses

- State of the Economy (annual)
 - 2022 State of the Economy
 - Special focus on Cost of Living (2022)
 - Special focus on Household Tax Burden (2021)
 - Special focus on Housing Affordability (2020)
 - Special focus on East Multnomah County (2018)
- Oregon's State of Trade (2019)
- Automation & the Future of Work (2017)

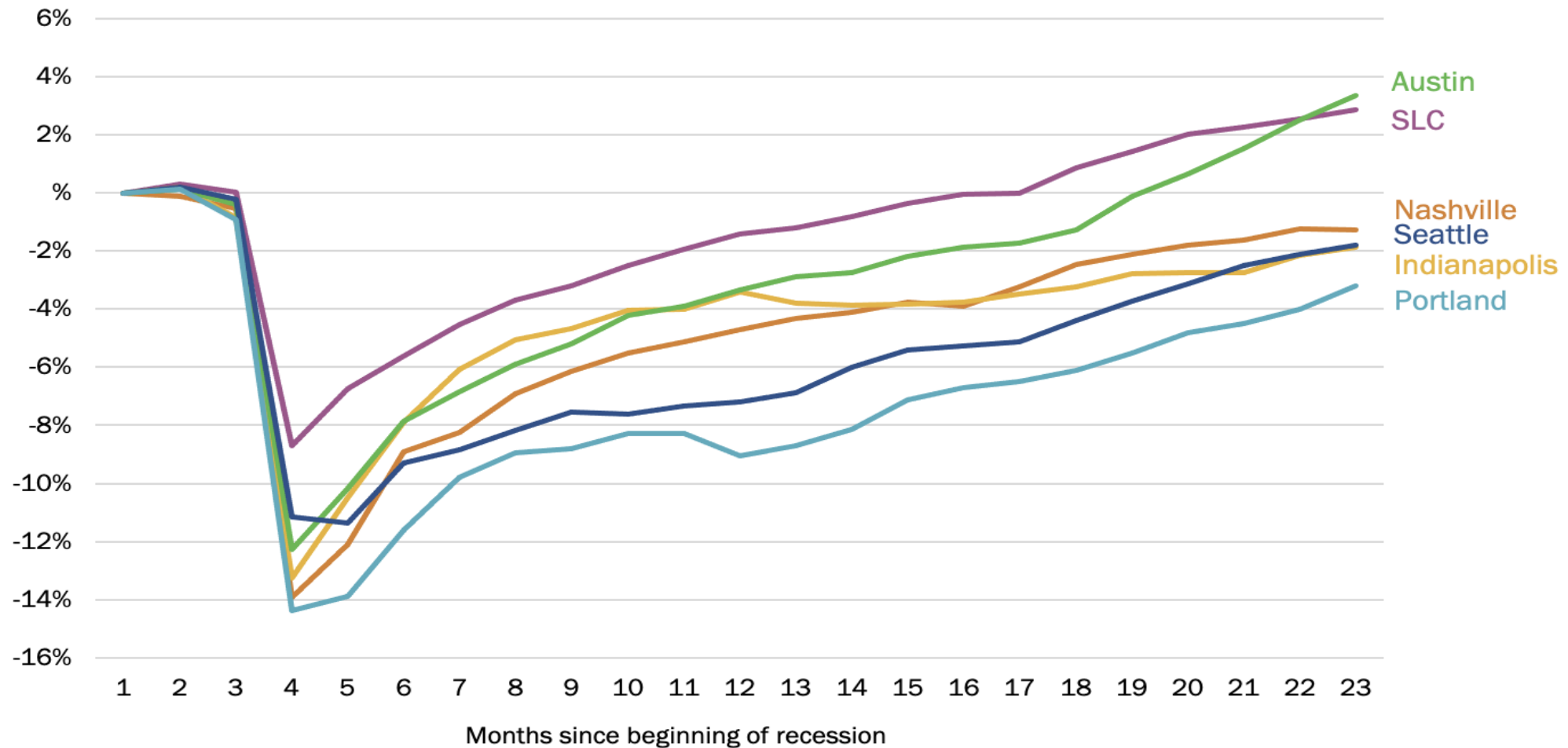
Jobs continue steady gain, expected to recover by early 2023

Portland Metro
Percent Change in Jobs Compared to February 2020



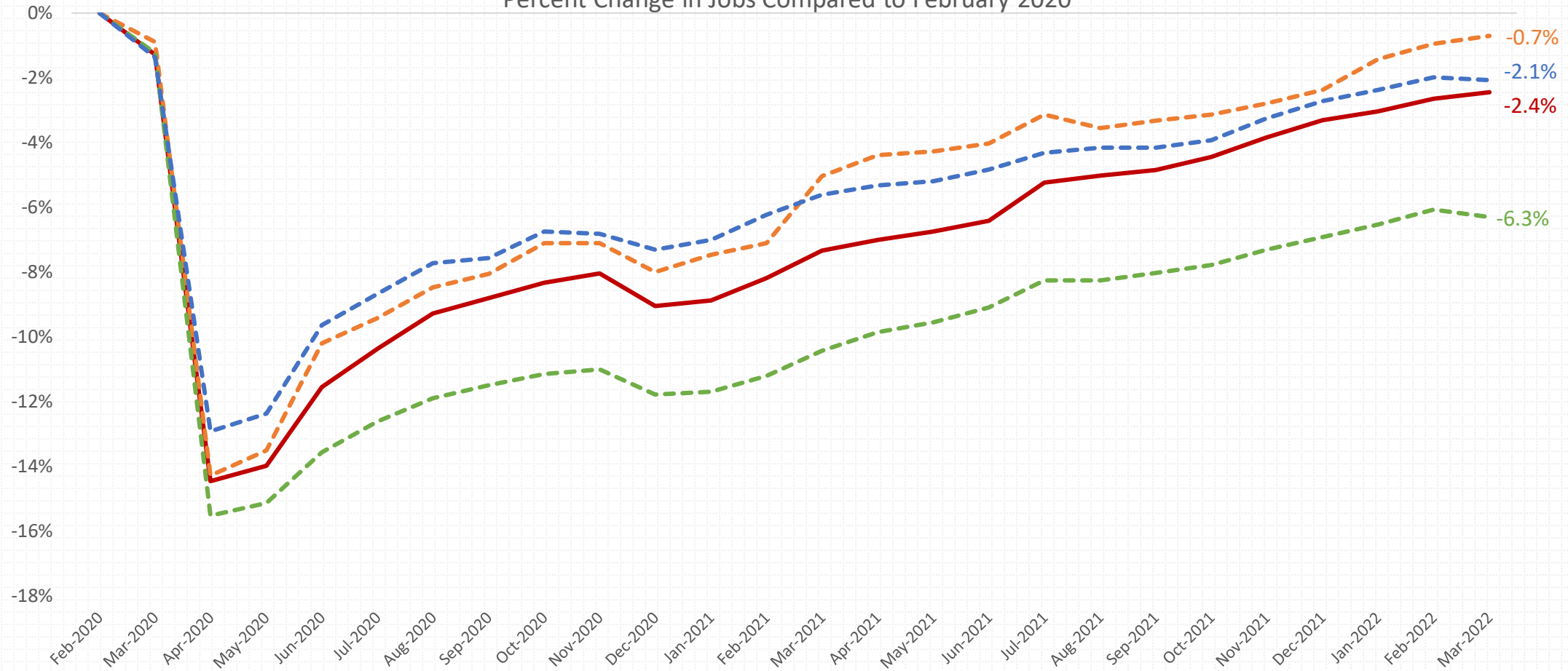
Portland's economy is resilient despite headwinds

Employment Change During the Pandemic – Portland vs. Peer Markets



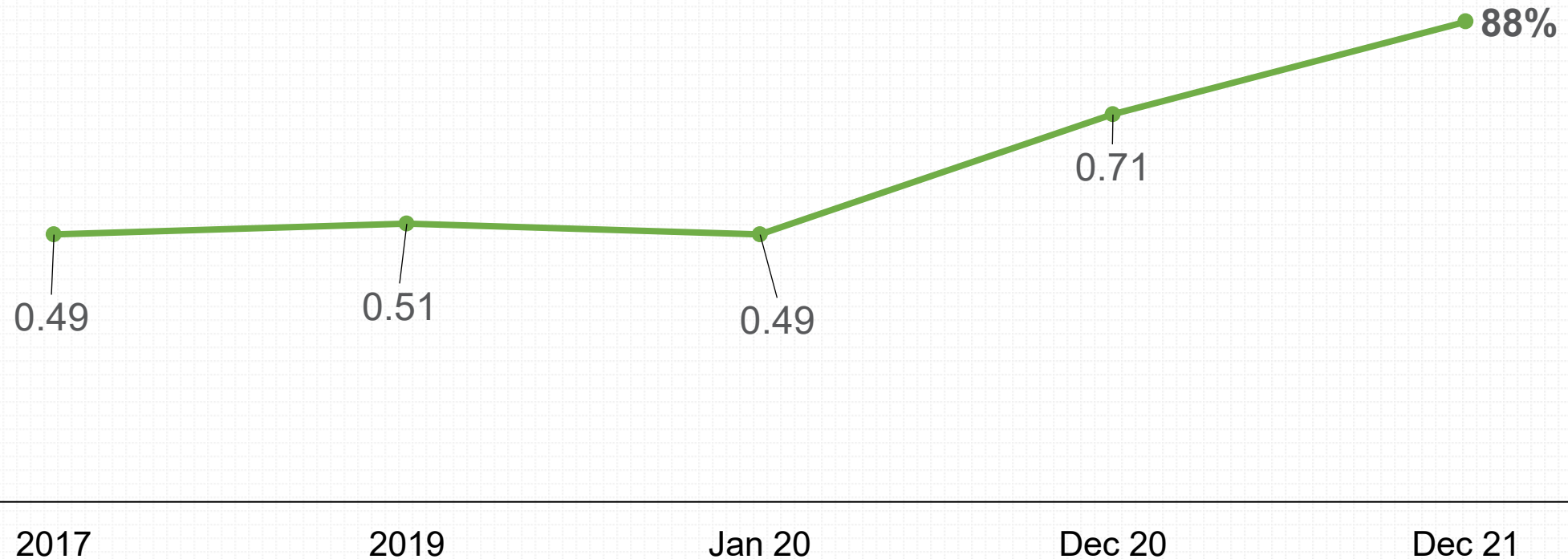
Job losses most heavily concentrated in Multnomah County

Portland Metro vs. Individual Counties
Percent Change in Jobs Compared to February 2020

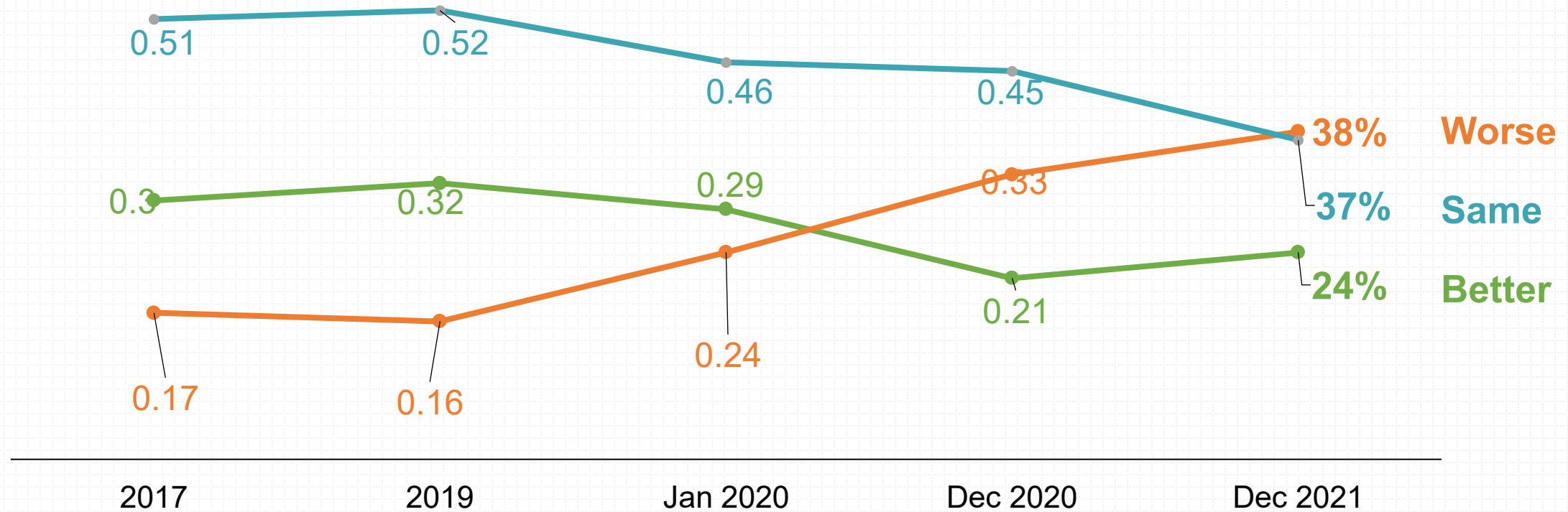


Portland has lost its competitive edge in quality of life and affordability

Most voters in the region say quality of life is getting worse



About four in ten voters say their household is worse off economically and this number has been steadily rising



OREGON:

THE STATE OF SPORT

The Economic Impact of the Athletic,
Outdoor, Team, and Recreation Industries



INTRODUCTION

FIRST-OF-ITS-KIND STUDY FOR GREATER PORTLAND, BEND AND EUGENE:

- What comprises the ATHLETIC, OUTDOOR, TEAM and RECREATION industry ecosystem?
- What is the region's value proposition for the industry?
- What value does the industry generate for the region?

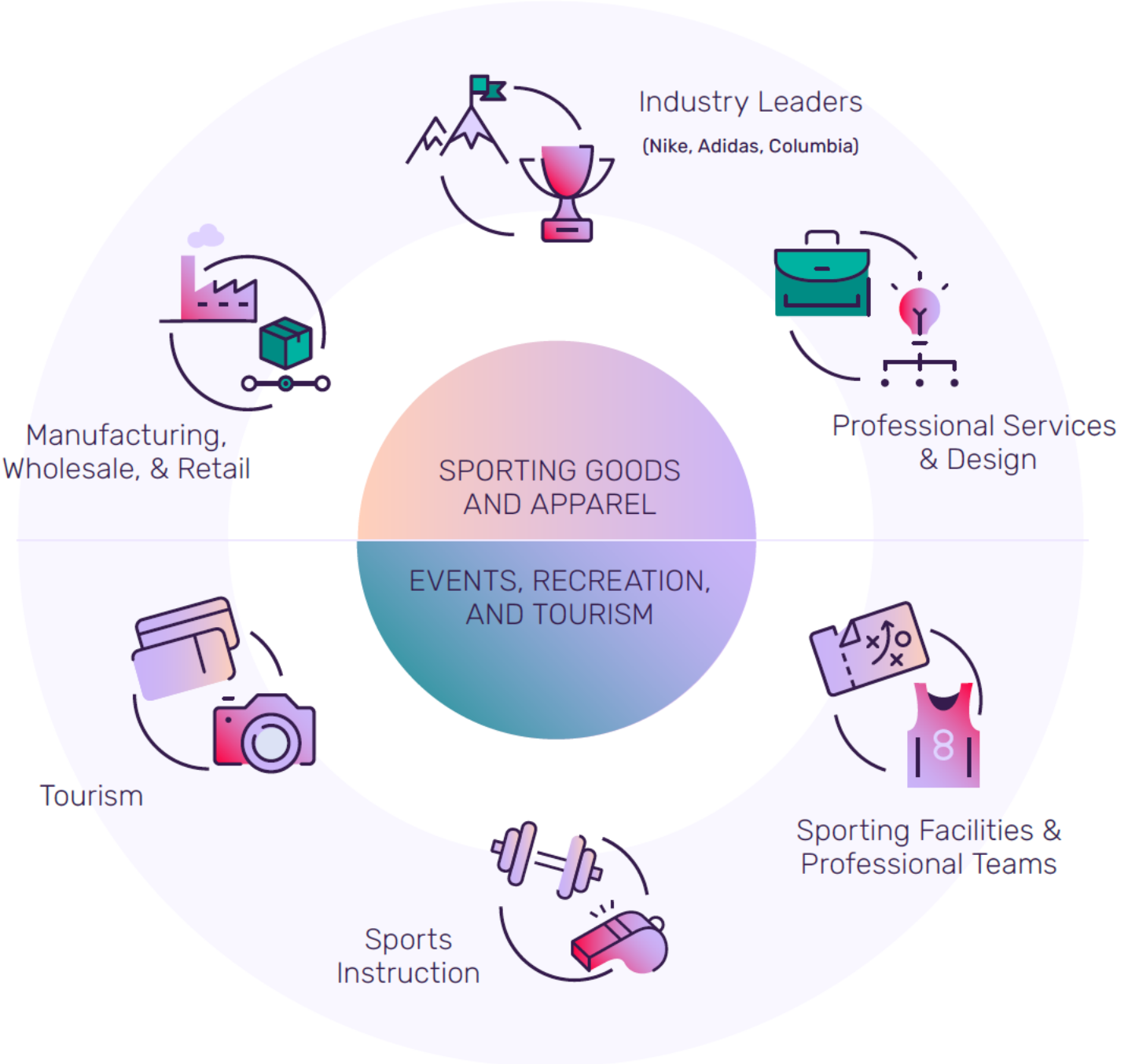
CORE FINDINGS:

- Unparalleled combination of talent, sporting events, outdoor recreation, and athletic culture
- National leader in sports activity and culture, punching far above the region's weight

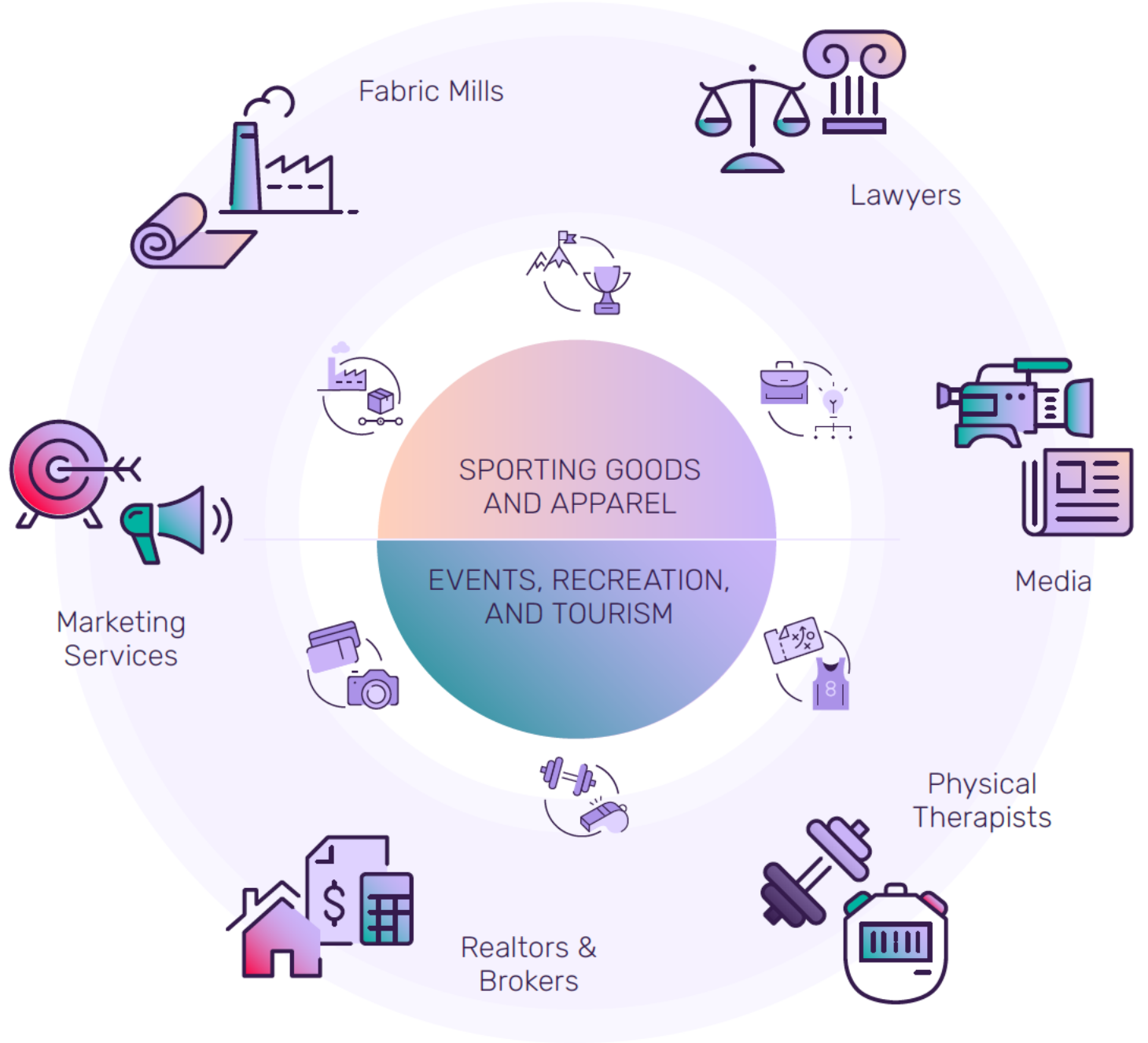


Tanner Springs Park, Cyclist. Credit: Justin Katigbak, Travel Portland

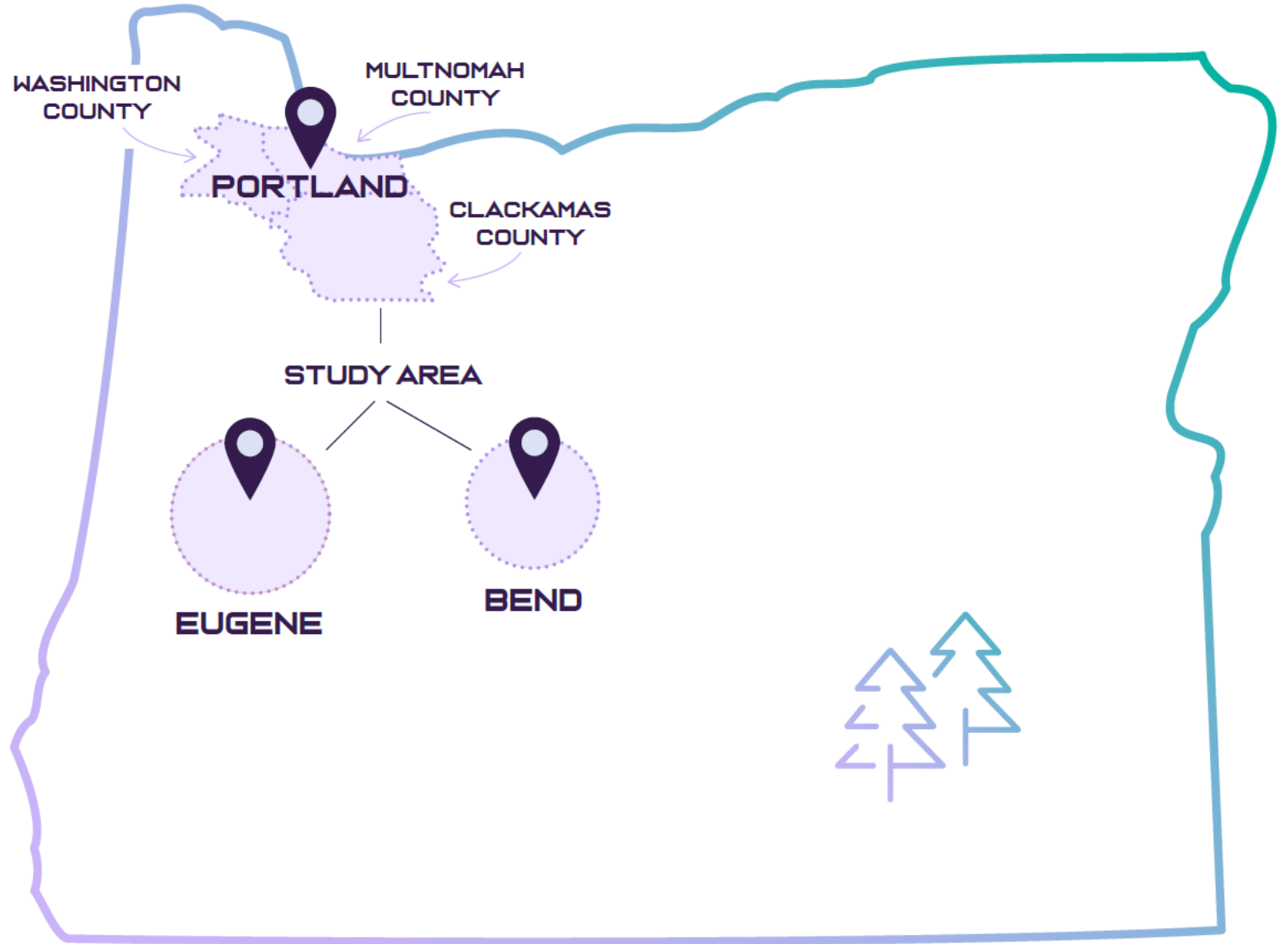
ATHLETIC, OUTDOOR, TEAM, AND RECREATION



SUPPORTIVE SERVICES



STUDY AREA: GREATER PORTLAND, EUGENE, AND BEND



STRONG DRIVER OF EMPLOYMENT AND GROWTH



JOBS IN THE ECOSYSTEM

in the Study Area (2019)

43K in Greater Portland



BUSINESSES IN THE ECOSYSTEM

in the Study Area (2022)

2,200 in Greater Portland



50%

2010-2019 JOB GROWTH IN THE ECOSYSTEM

in the Study Area compared to **21%** overall

56% Job growth in the Ecosystem within Greater Portland

GREATER PORTLAND ECOSYSTEM TRENDS



ECOSYSTEM SECTOR OVERVIEW

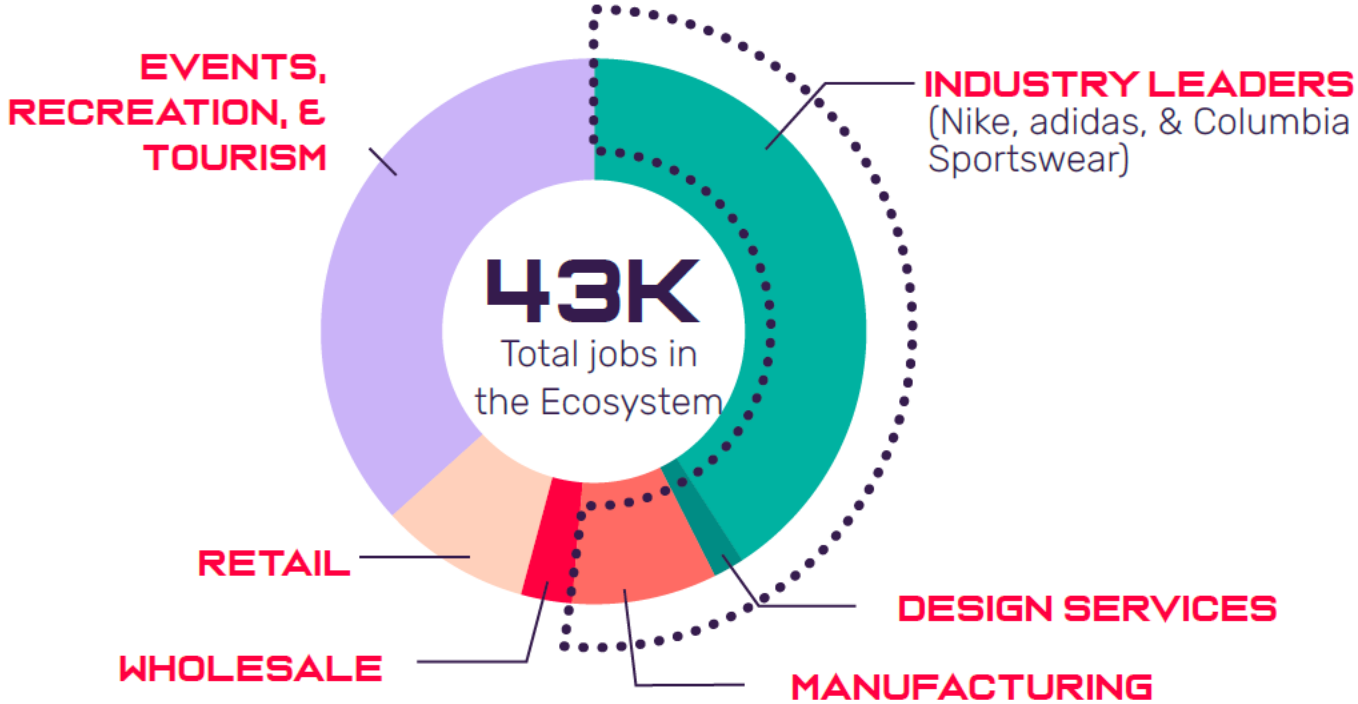
52%

JOBS IN THE ECOSYSTEM

in higher-pay and/or higher-skilled sectors

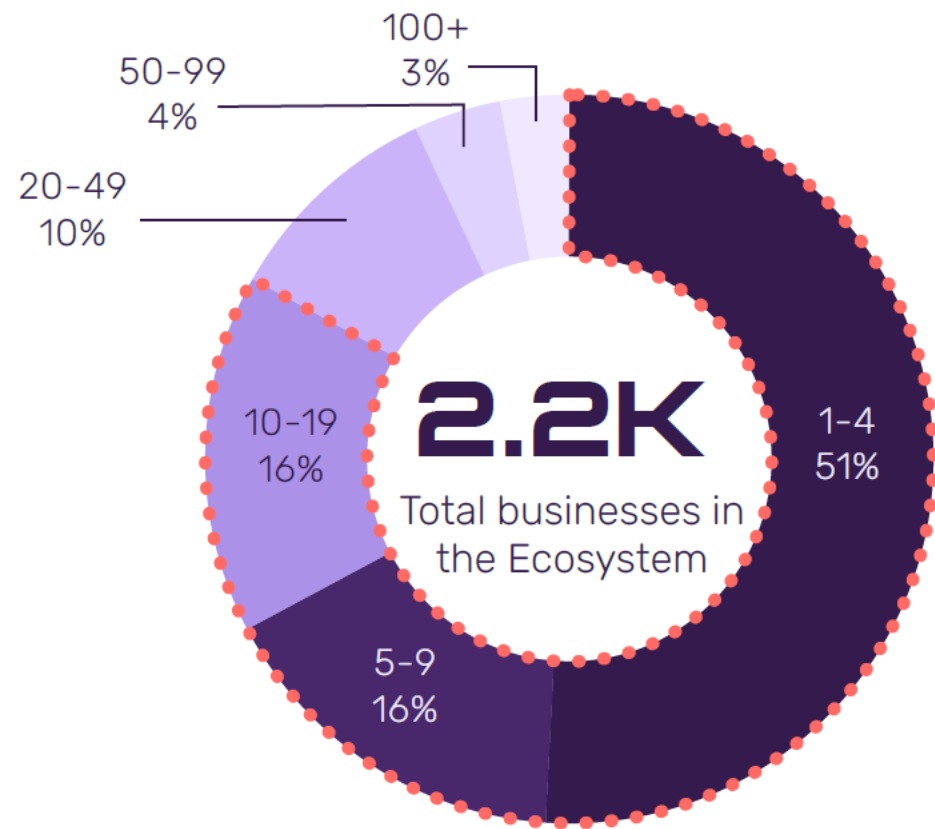


ECOSYSTEM JOBS IN GREATER PORTLAND 2019



SMALL BUSINESSES

DISTRIBUTION OF ECOSYSTEM BUSINESSES in Greater Portland by Employee Count, 2022



83%

BUSINESSES IN THE ECOSYSTEM

with fewer than 20 employees

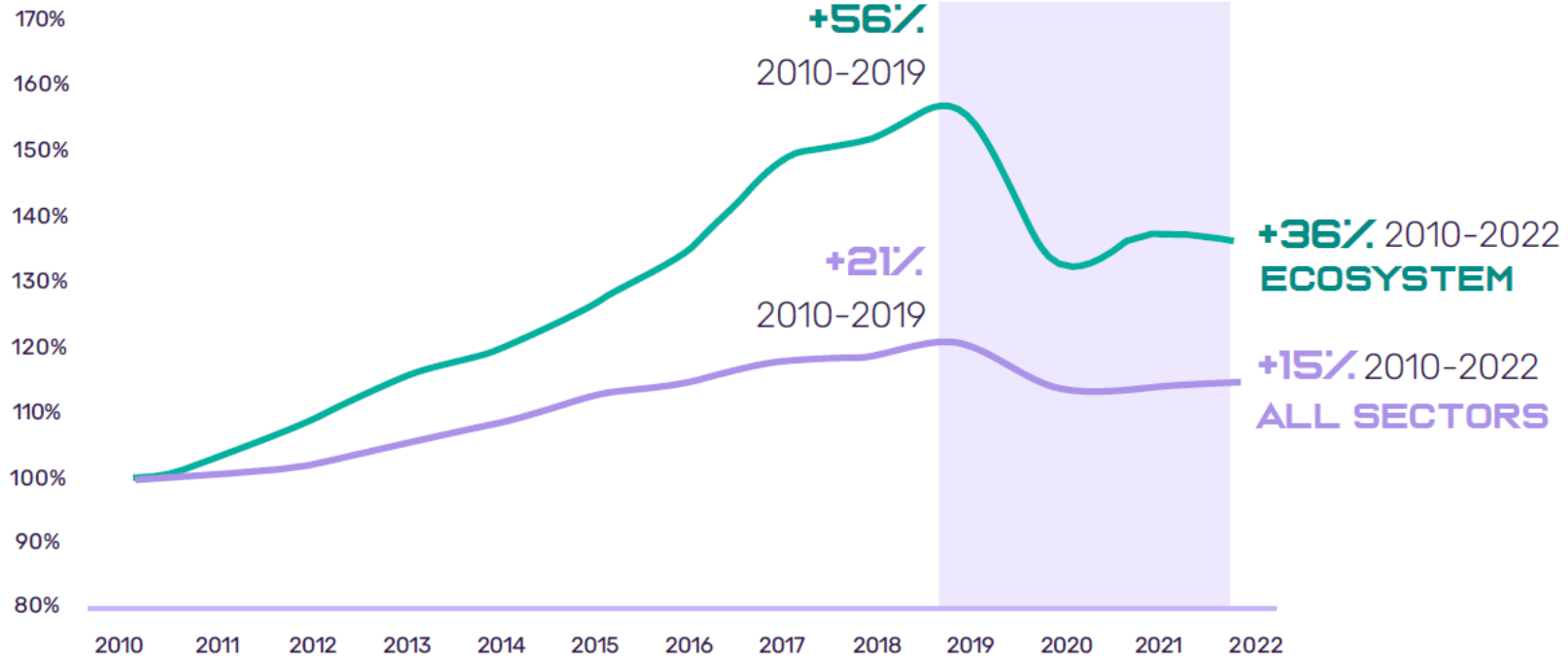


ECOSYSTEM GROWTH

JOB GROWTH IN THE ECOSYSTEM **VS.** **ALL SECTORS IN GREATER PORTLAND**

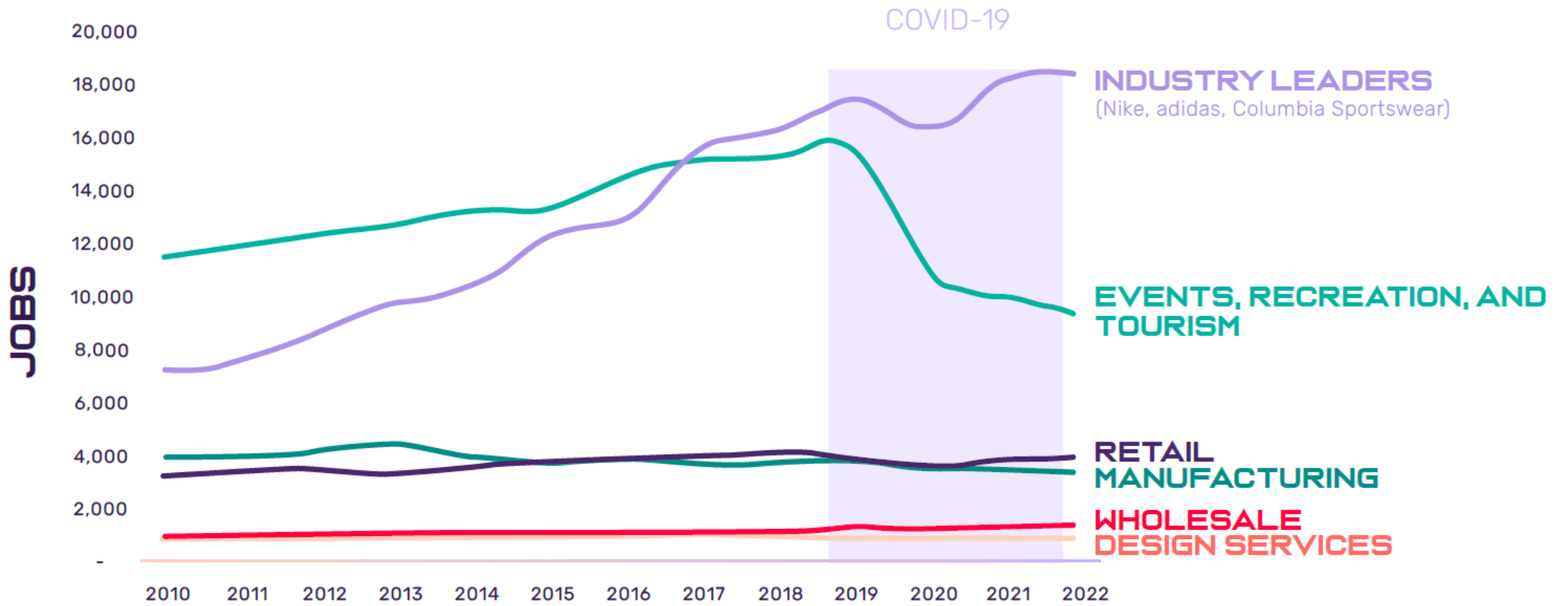
Indexed to 2010

COVID-19



GROWTH BY SECTOR

JOBS IN GREATER PORTLAND'S TOP SECTORS AND EMPLOYERS
2010-2022



ECOSYSTEM BENCHMARKING



COMPARISON REGIONS

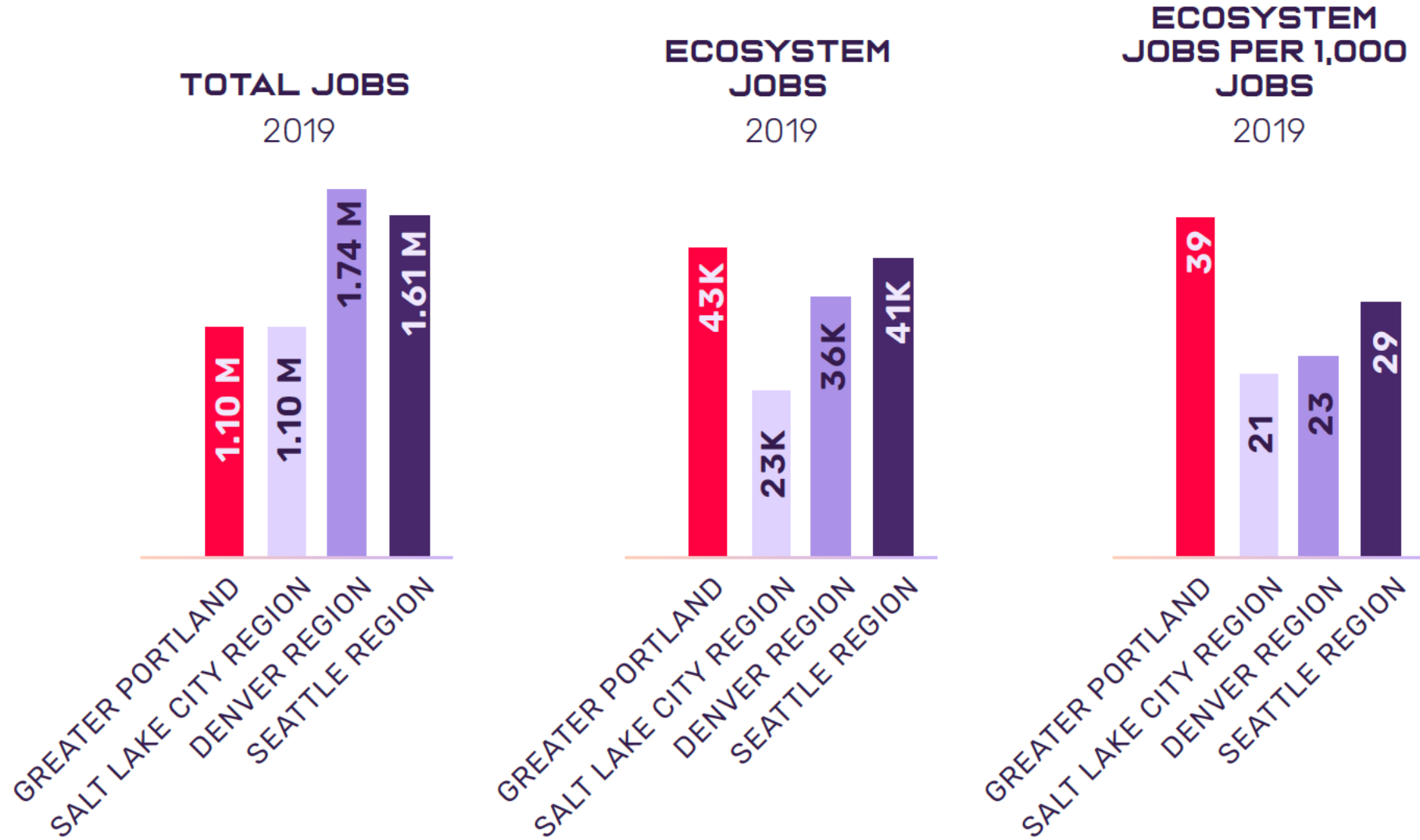


Mt. Tabor Park, Reservoir. Credit: Isaac Lane Koval, Travel Portland

Scappoose Bay, Kayakers and a Stand-Up Paddleboarder. Credit: Andrea Johnson Photography, Travel Portland

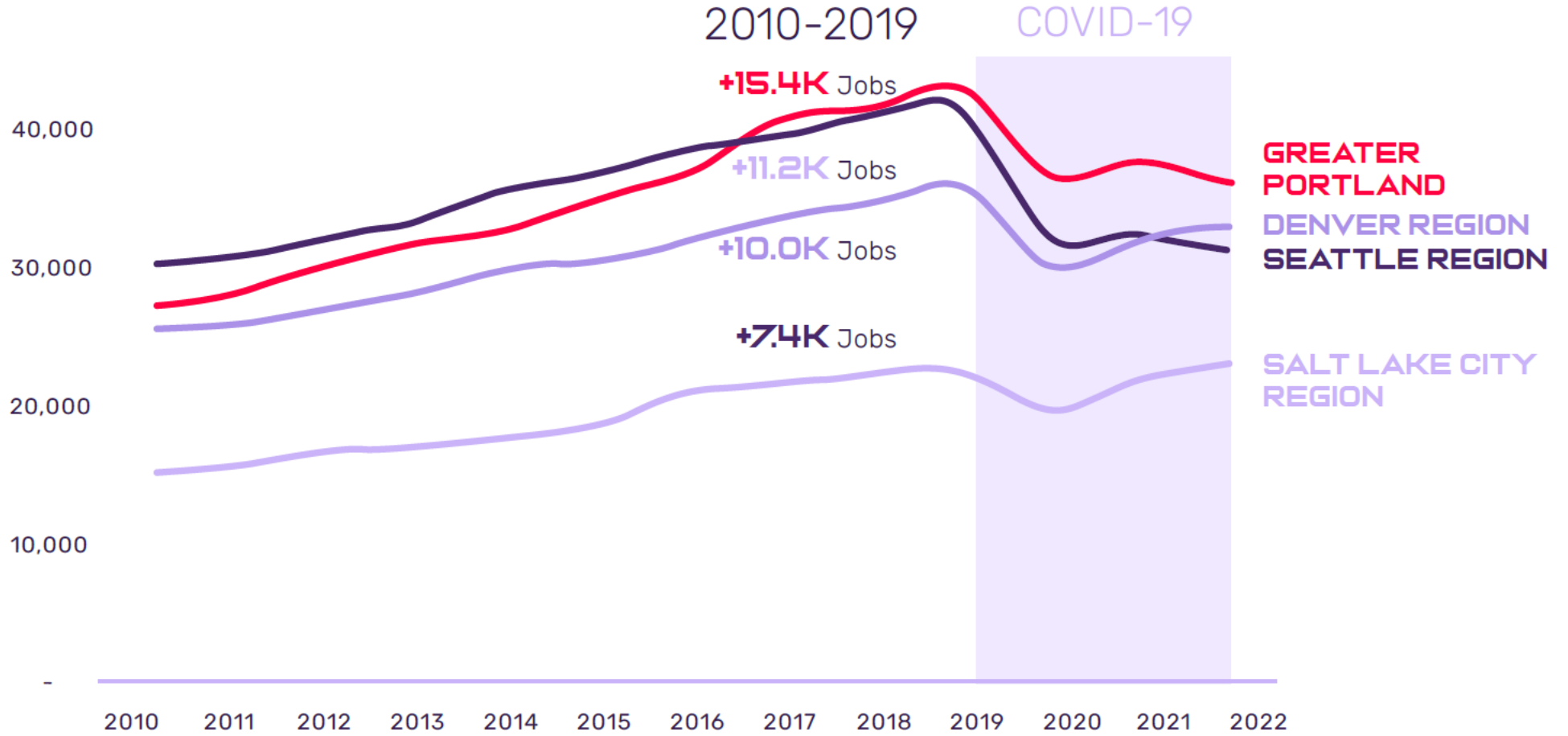


THE GREATER PORTLAND ECOSYSTEM IS LARGEST, DESPITE SMALLER POPULATION AND TOTAL JOBS



ECOSYSTEM GROWTH

CHANGE IN ECOSYSTEM JOBS ACROSS COMPARISON REGIONS



GREATER SECTORAL DIVERSITY AND CONCENTRATION OF HIGH-PAYING/SKILLED JOBS



**WORKERS IN
GREATER PORTLAND**

are in high-paying, highly-skilled jobs **compared to...**

24% WORKERS IN
SALT LAKE CITY

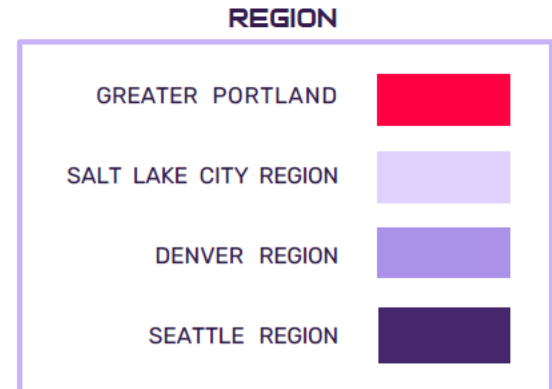
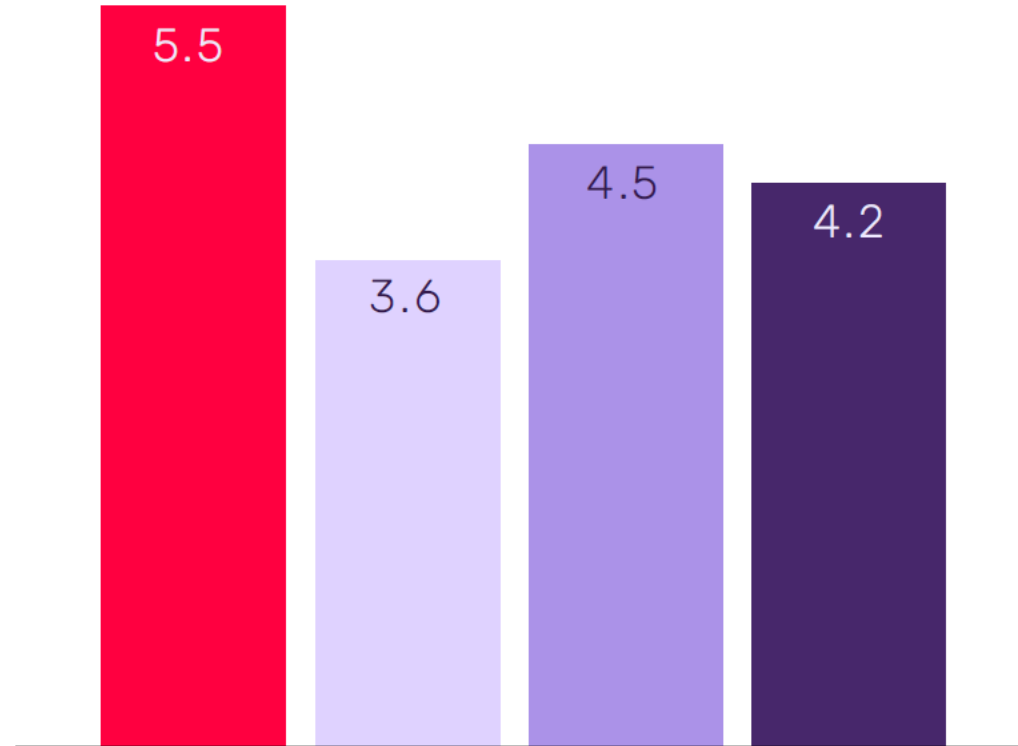
16% WORKERS IN
DENVER

20% WORKERS IN
SEATTLE

HIGH-SKILLED CREATIVE OCCUPATIONS

JOBS IN SELECTED CREATIVE SPORTING GOODS OCCUPATIONS PER 1,000 JOBS

2019



ART DIRECTORS + FASHION, COMMERCIAL, INTERIOR, & OTHER DESIGNERS

60%

CREATIVE OCCUPATION JOB GROWTH

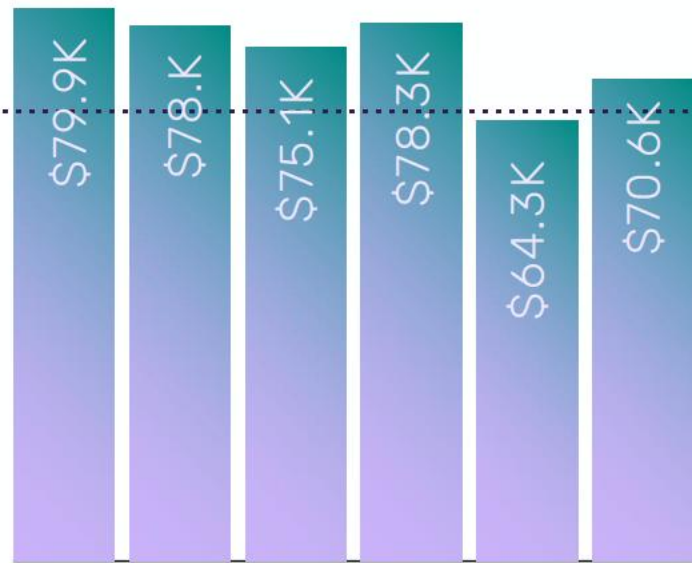
In Greater Portland between 2010 and 2019

THESE CREATIVE OCCUPATIONS ARE HIGHLY SKILLED AND WELL-PAID

AVERAGE WAGES

2019

\$65.7K
ALL SECTORS



6,947

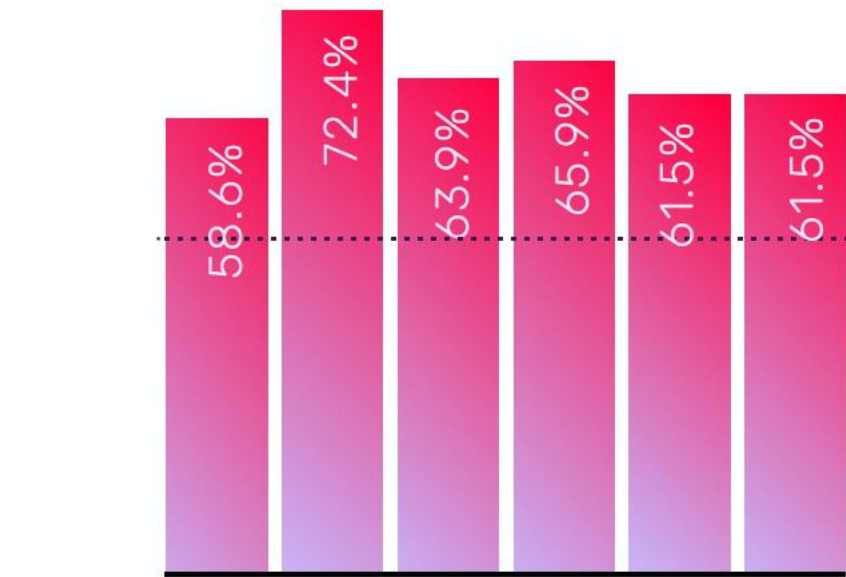
CREATIVE OCCUPATIONS

Art directors + fashion, commercial, interior, & other designers

SHARE OF WORKERS WITH COLLEGE DEGREES

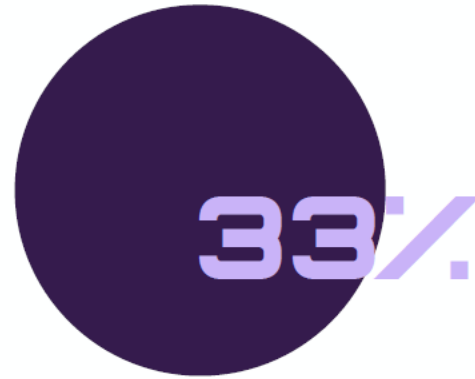
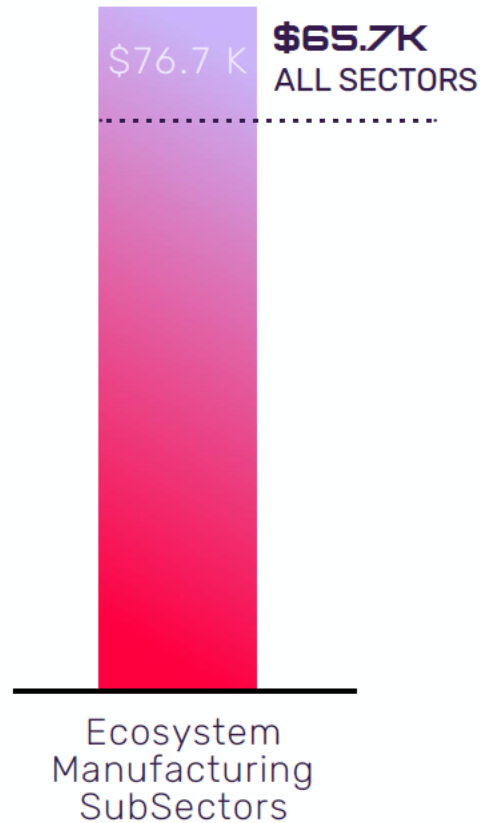
2019

43.3%
ALL SECTORS



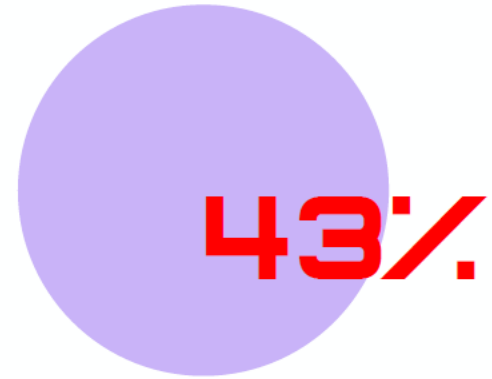
MANUFACTURING SUB-INDUSTRIES OFFER WELL PAYING JOBS TO DIVERSE WORKFORCE AND WORKERS WITHOUT COLLEGE DEGREES

Average Wages
in Selected Manufacturing Sectors in
Greater Portland 2019



WORKER RACE

in Selected Manufacturing Sectors in Greater Portland 2019 compared with **27%** in all sectors



SHARE OF WORKERS WITH A COLLEGE DEGREE

in Selected Manufacturing Sectors in Greater Portland 2019 compared with **15%** in all sectors

GENERATES SIGNIFICANT ECONOMIC ACTIVITY FOR REGION AND STATE OF OREGON



**DIRECT, INDIRECT,
AND INDUCED JOBS**

9% of the Study Area's total jobs



**DIRECT, INDIRECT,
INDUCED ECONOMIC
OUTPUT**



**ANNUAL TAX REVENUE
TO THE STATE OF
OREGON**

WHAT NEXT?

Communicate Oregon's unique value proposition to the U.S. and the world

Enhance Ecosystem's employment diversity through partnerships, education, and workforce development

Strengthen regional competitiveness for Ecosystem growth with strategic investments and policy tools

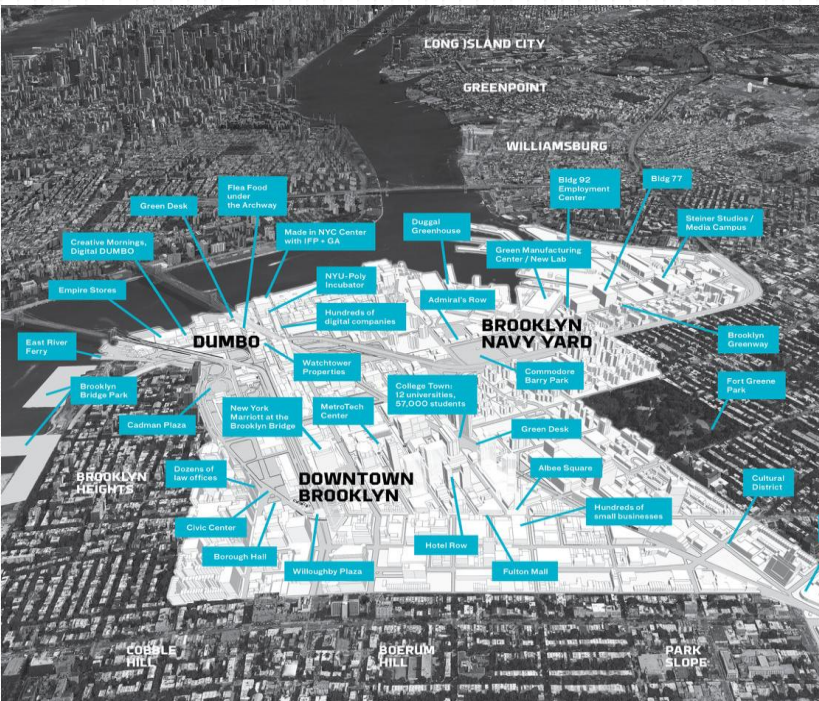
What is our economic brand proposition?

- Highly specialized workforce with unique skills sets and programs for the Athletic Outdoor Recreation and Team economy
- World headquarters of Nike, adidas North America, and thousands more
- World-class major league sports and global competitions
- World-class destination for outdoor adventure

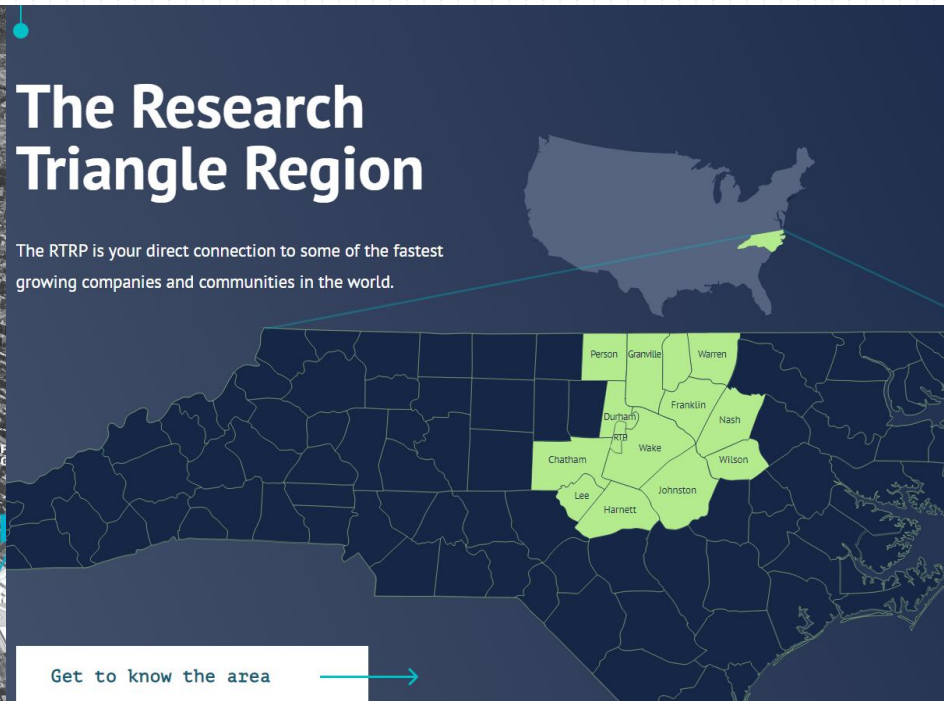


If you name it, they will *know* it...

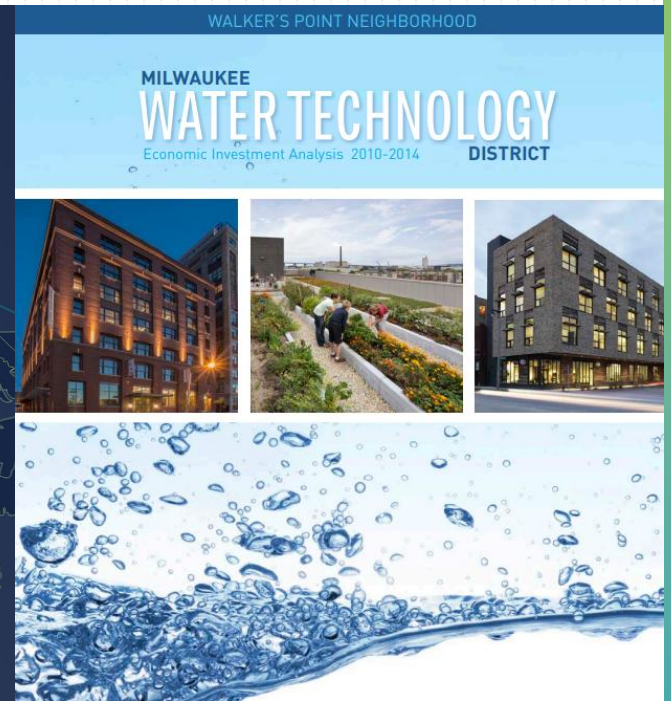
Brooklyn Tech Triangle



North Carolina - The Research Triangle



Milwaukee Water Technology District




ACKNOWLEDGEMENTS

This effort would not have been possible without the broad and sustained support of the following organizations dedicated to promoting Portland and helping the region grow equitably, sustainably, and resiliently.



OREGON: THE STATE OF SPORT

The Economic Impact of the Athletic, Outdoor,
Team, and Recreation Industries.

Download The State of Sport Report 



Welcome to Oregon, the State of Sport.

As you'll read in "Oregon: The State of Sport," we are a global epicenter for the Athletic, Outdoor, Team, and Recreation ecosystem.

DOWNLOAD THE FULL REPORT AT:

OregonStateofSport.com

ACKNOWLEDGEMENTS

Weinstein PR



PRESENTING SPONSOR

Stacey M.L. Dodson, U.S. Bank

SPONSORS

Katy Brooks, Bend Chamber of Commerce

Brittany Quick-Warner, Eugene Area Chamber of Commerce

Angela Wilhelms, Oregon Business & Industry

Duncan Wyse, Oregon Business Council

Jason Brandt, Oregon Restaurant & Lodging Association

Curtis Robinhold, Port of Portland

Andrew Hoan, Portland Business Alliance

Jim Etzel, Sport Oregon

Jeff Miller, Travel Portland

Deanna Palm, Washington County Chamber of Commerce

STAKEHOLDER PARTICIPANTS ACKNOWLEDGEMENT

Colin Sears, Business Oregon

Jon Stark, Economic Development for Central Oregon

Monique Claiborne, Greater Portland Inc

Mari Watanabe, Partners in Diversity

Tamara Kennedy-Hill, Port of Portland

Craig Cheek, Portland Diamond Project

Kimberly Branam, Prosper Portland

Sucheta Bal, Prosper Portland

Andrew Desmond, Oregon Business Council

Ken Henson, Oregon Restaurant & Lodging Association

Lee Davis, Oregon State University

Nathan Nayman, Sport Oregon

Mike Golub, Portland Timbers and Thorns

Amanda Lowthian, Travel Portland

Chris Oxley, Trail Blazers

Carlyn Schreck, University of Oregon

Andrew McGough, Worksystems, Inc.

CONSULTING TEAMS

HR&A ADVISORS

Jill Schmidt Bengochea

Sulin Carling

Kate Collignon

Cary Hirschstein

Juan Pablo Ponce de Leon

WEINSTEIN PR

Julie Beals

Kate Bailey French

Katie Hull

Molly Ishkanian

Chris Ryan

Taylor Siolka

Dennis Vieira

Jeanette Vieira

PORTLAND BUSINESS ALLIANCE

STAFF AND CONSULTANTS

Vanessa Briseño

Benjamin Forstag

Jon Isaacs

Andrew Hoan

Elizabeth Howe

Rebecca McCulloch

Sydney Mead

Katie Mongue

Ashley Odil