

PROSPER PORTLAND

Business Advancement Team



INCLUSIVE
JOB CREATION



BUSINESS
COMPETITIVENESS



EQUITABLE ECONOMIC
GROWTH

Athletic & Outdoor
Technology & Media
Metals & Machinery
Green Cities
Portland Means Progress
Enterprise Zone
International Trade

APPAREL & OUTDOOR: GLOBAL TRENDS

- **Growing direct-to-consumer (DTC) and E-commerce presence**
 - Apparel and outdoor brands comprise more than 40% of all DTC sales
- **Retail bouncing back post-COVID**
 - 2022 sales expected to surpass pre-COVID levels
- **ReCommerce gaining traction**
 - Renting, reselling, or thrifting previously owned apparel; industry is projected to rise from \$7BN to \$36BN by 2024
- **Increasing role of digitalization in retail**
 - From AR/VR dressing rooms to big data to customizable, AI-powered fashion assistants

APPAREL & OUTDOOR: PORTLAND REGION ASSETS

- Portland MSA has highest concentration of A&O employees in the country.
- 6 Higher Education Programs, including industry specific ones at PSU and U of O.
- Several VC funding opportunities
- Large, established companies (Nike, Adidas, Columbia, Leatherman, etc.)

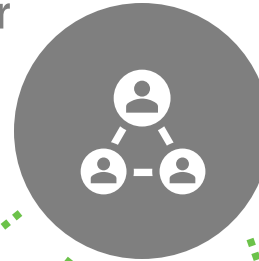
Apparel & Outdoor	Portland MSA
Establishments	511
Employment	7,404
Location Quotient (LQ)	1.3
Industry Output	\$612,660,000
Average Wage	\$82,700

Business Competitiveness

A&O company wants to expand or access resources



Connects with Prosper Cluster Liaison



Site Selection Assistance



Enterprise Zone



Loans



Introduction to New Markets/Export



Inspiring Diversity Grant

RESOURCES / INITIATIVES



- Domestic/International Trade Shows (Portland Supply)
- Prosper Business Loans and Working Capital
- Industry Specific Events and Programs



- Industry website (AOPortland.com)
- Relationship Management/Building
- Newsletter/Community Features
- A&O Professionals (education and networking for industry talent)



- Inspiring Diversity Grant
- Greet and Grow B2B Program
- Portland Means Progress



COMPANIES AND PARTNERS ENGAGED:

KEEN, CASTELLI & SPORTFUL, COLUMBIA SPORTSWEAR, SNEAKER WEEK, BUILT OREGON, BUSINESS OREGON, GPI, NIKE, MAPLE XO, HOUSE DOGGE, HIFI SOUND CYCLING COMPONENTS, MERCATUS, OMORPHO, BIKETOWN, UNLESS COLLECTIVE, NO END OF CLOTHING, SUSTAINABLE FASHION FORUM, AND MORE.



PORTLAND
BUSINESS ALLIANCE

VALUE OF JOBS COALITION

Oregon: The State of Sport

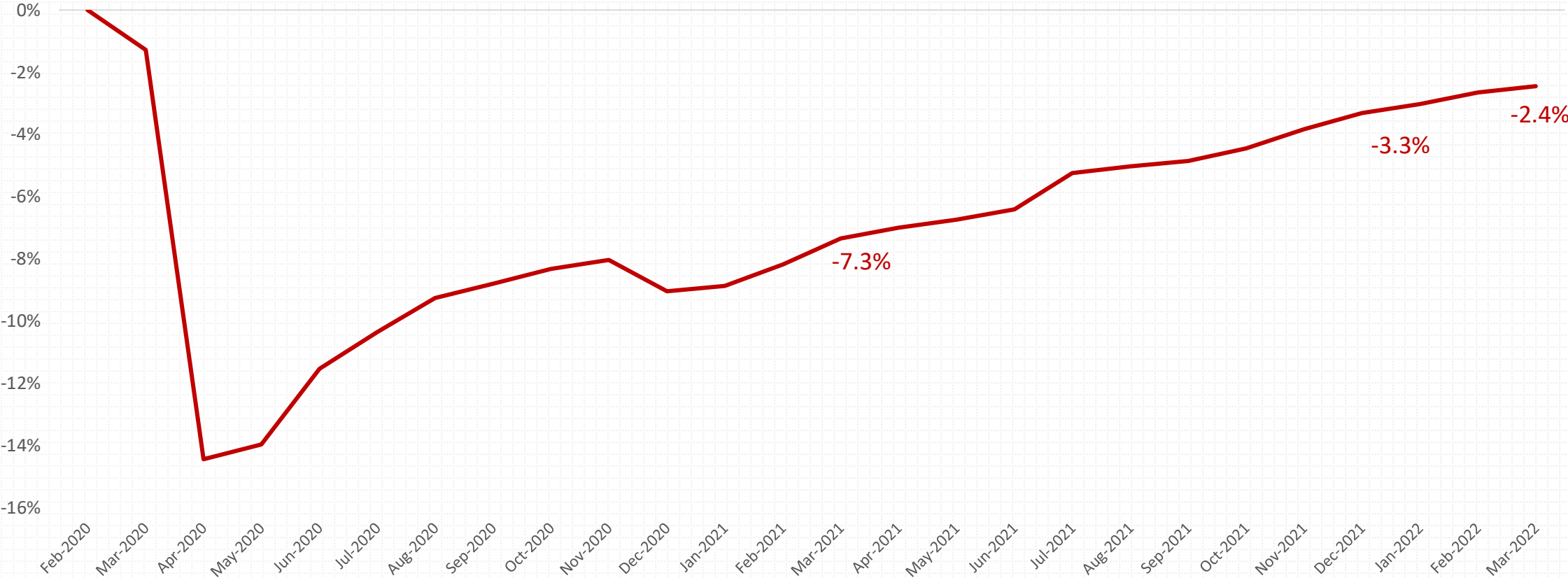
ECONOMIC REPORTS

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)

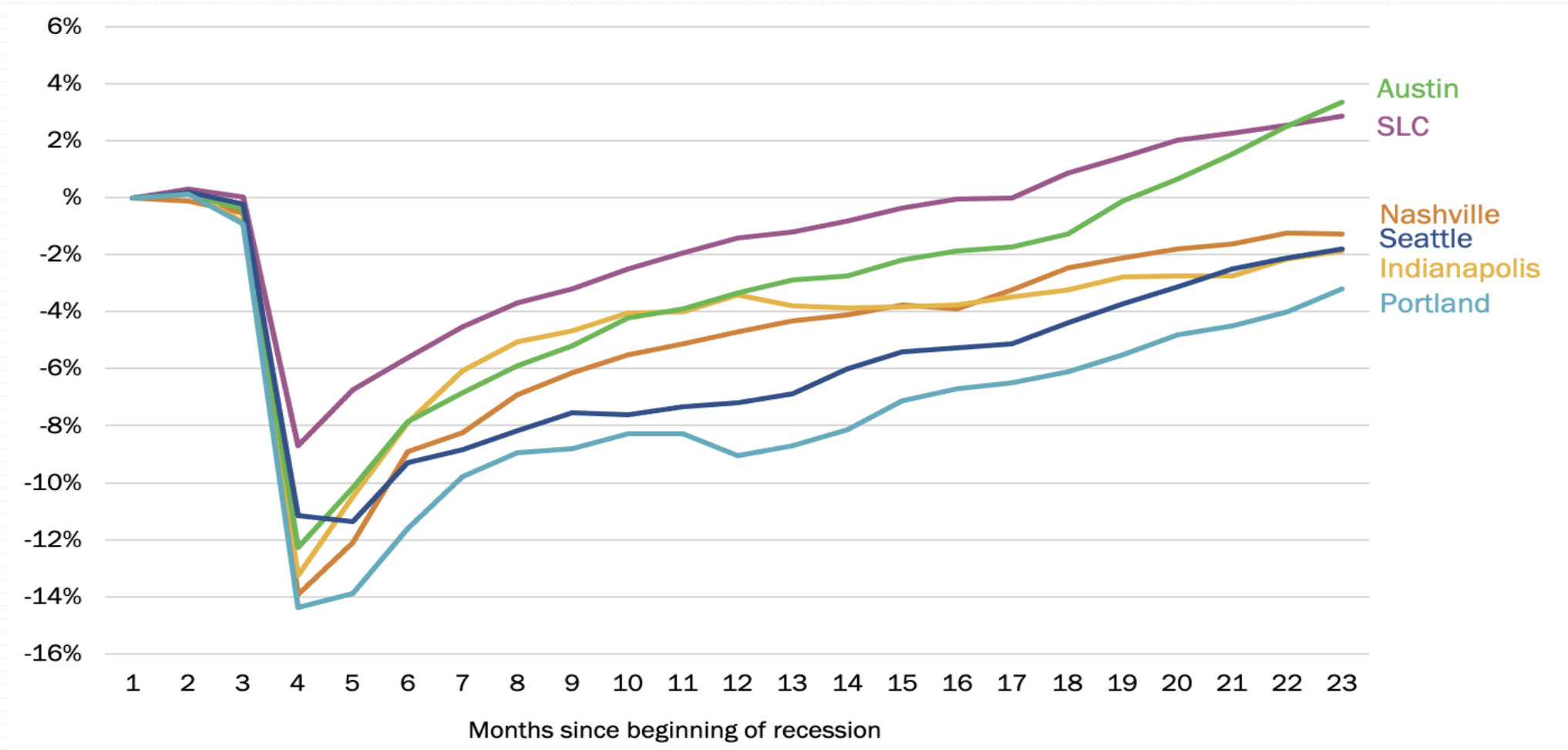
Jobs continue steady gain, expected to recover by early 2023

Portland Metro
Percent Change in Jobs Compared to February 2020

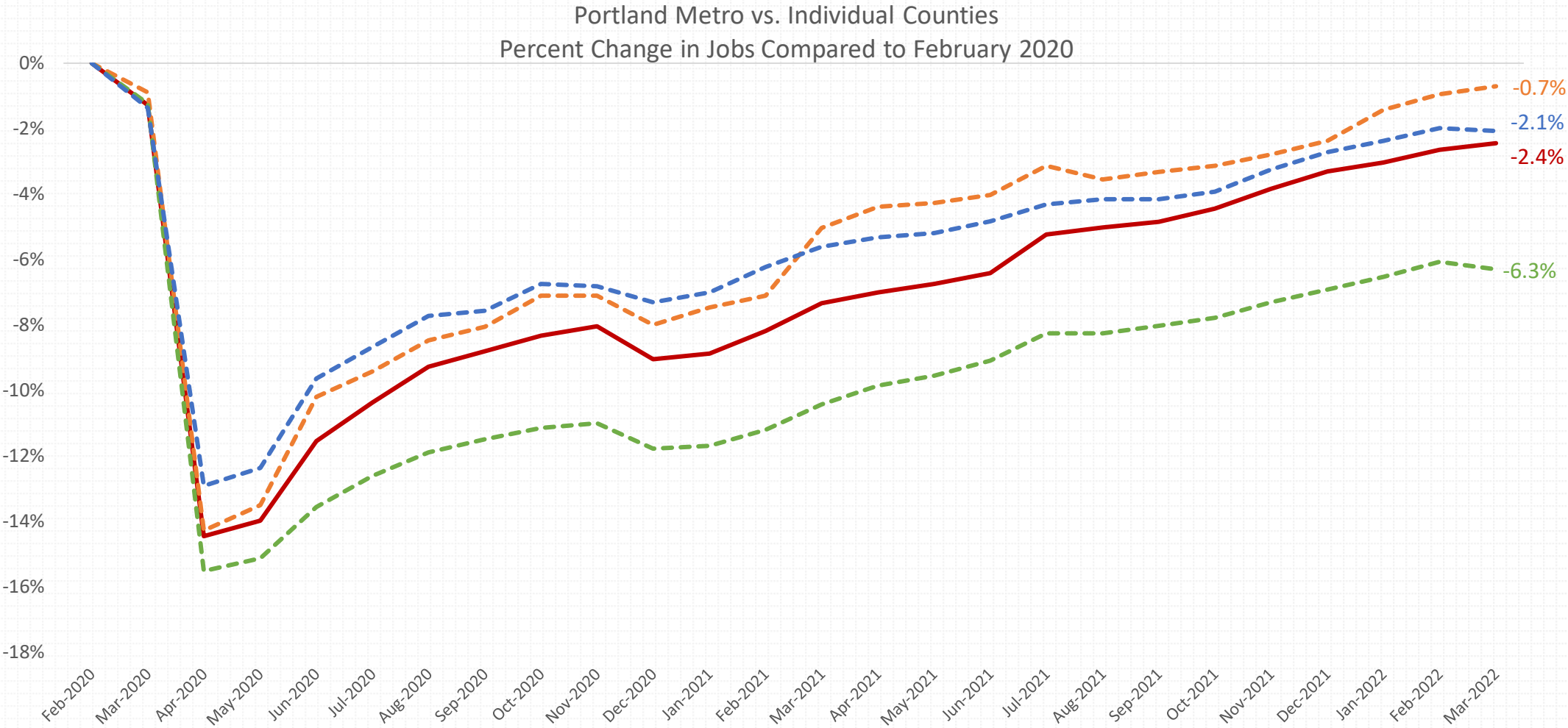


Portland's economy is resilient despite headwinds

Employment Change During the Pandemic – Portland vs. Peer Markets

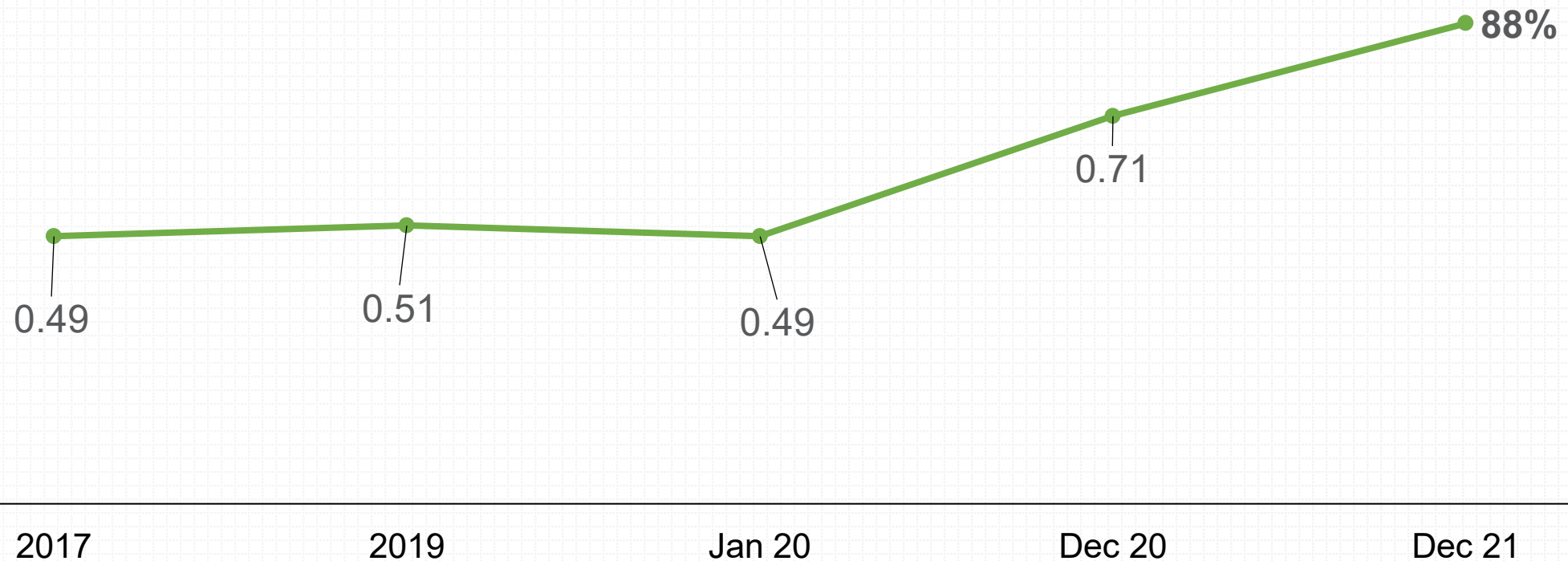


Job losses most heavily concentrated in Multnomah County

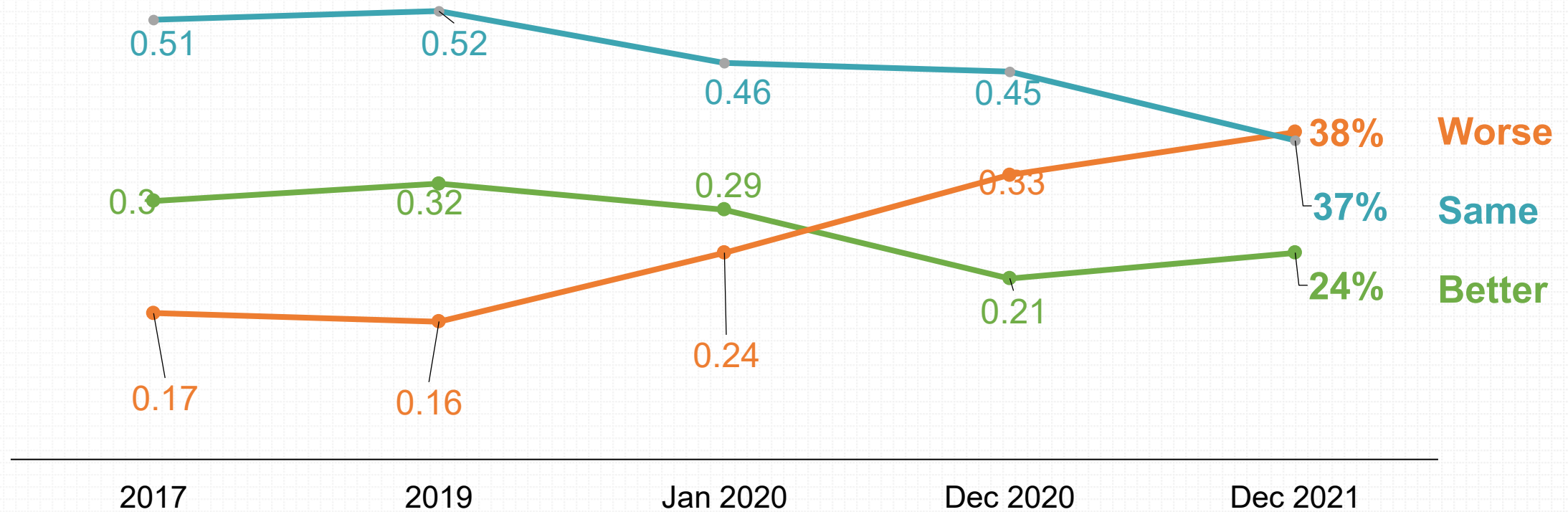


Portland has lost its competitive edge in quality of life and affordability

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?

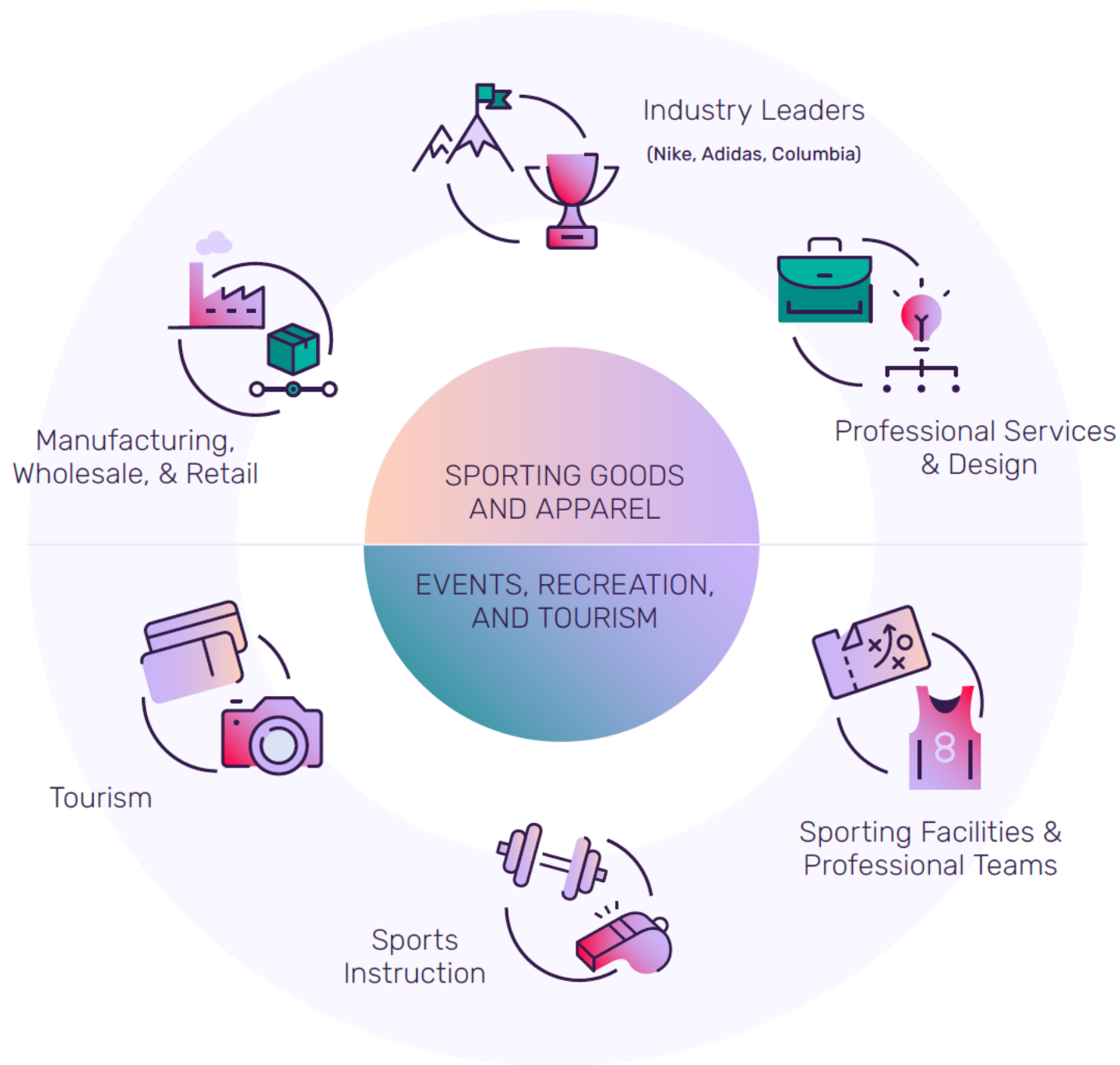
CORE FINDINGS:

- 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

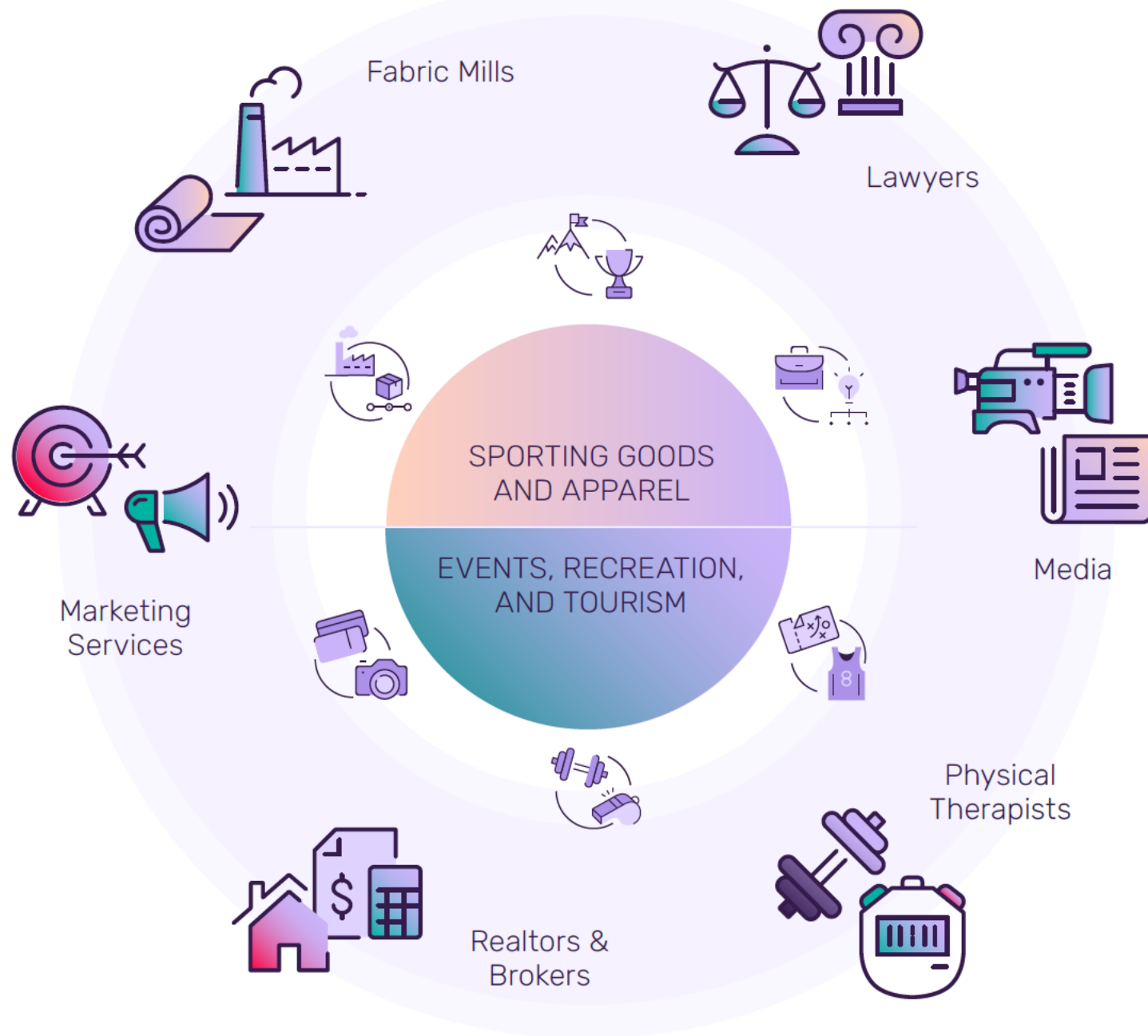


Tanner Springs Park, Cyclist. Credit: Justin Katigbak, Travel Portland

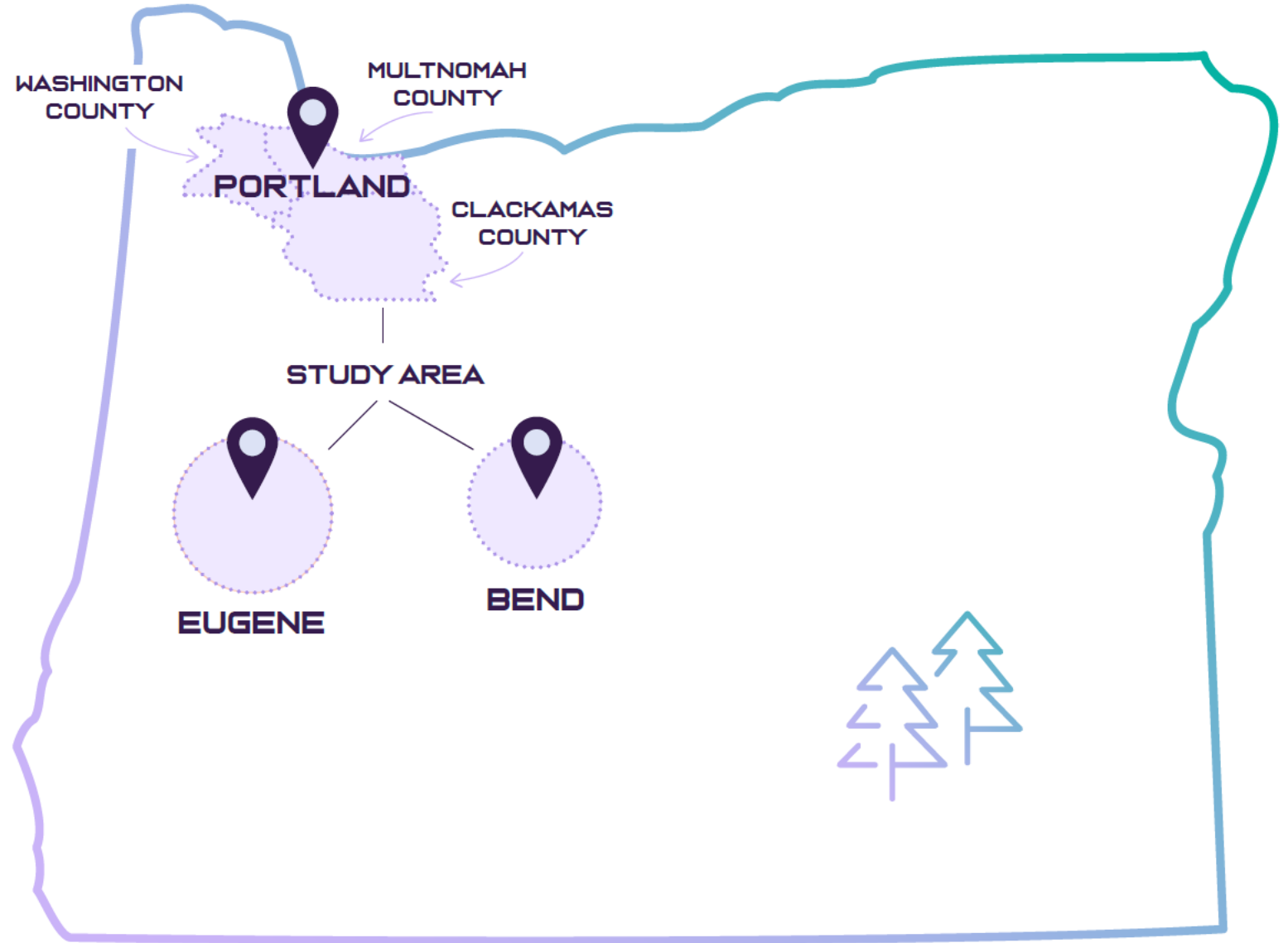
ATHLETIC, OUTDOOR, TEAM, AND RECREATION



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

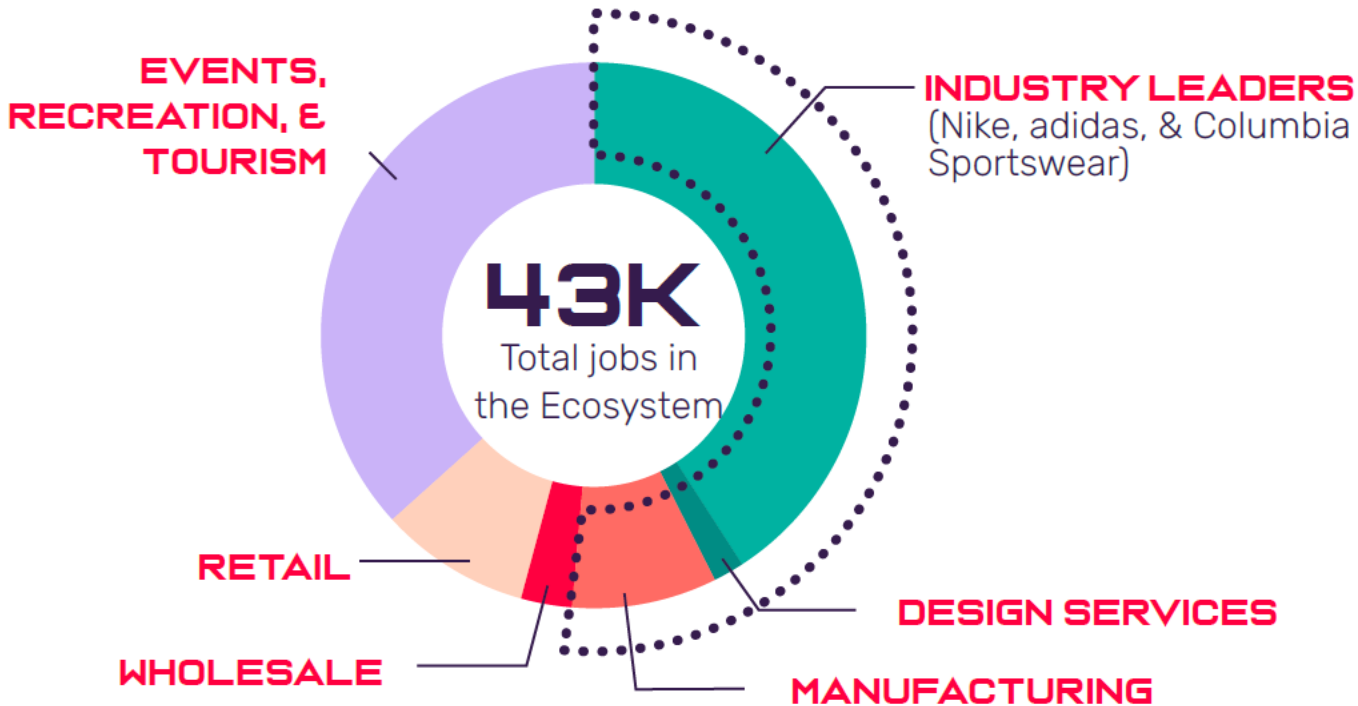
52%

JOBS IN THE ECOSYSTEM

in higher-pay and/or higher-skilled sectors

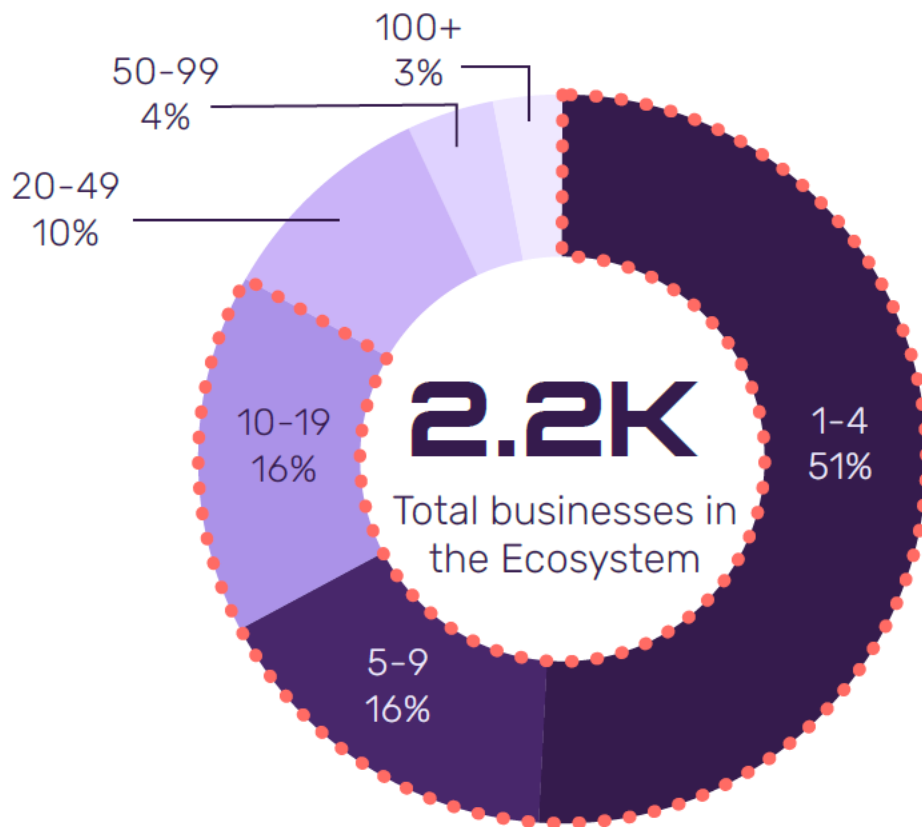
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ECOSYSTEM JOBS IN GREATER PORTLAND 2019



SMALL BUSINESSES

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



83%

BUSINESSES IN THE ECOSYSTEM

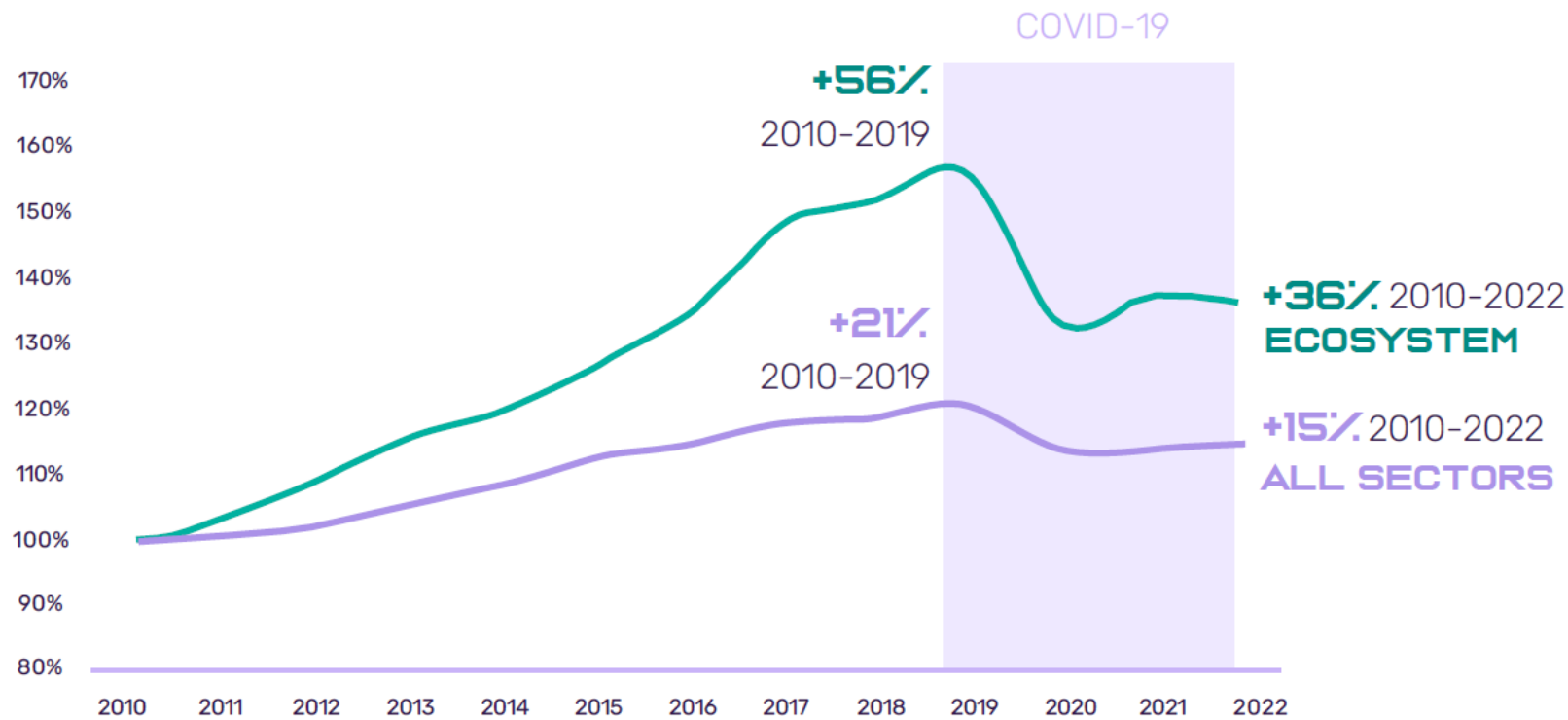
with fewer than 20 employees



ECOSYSTEM GROWTH

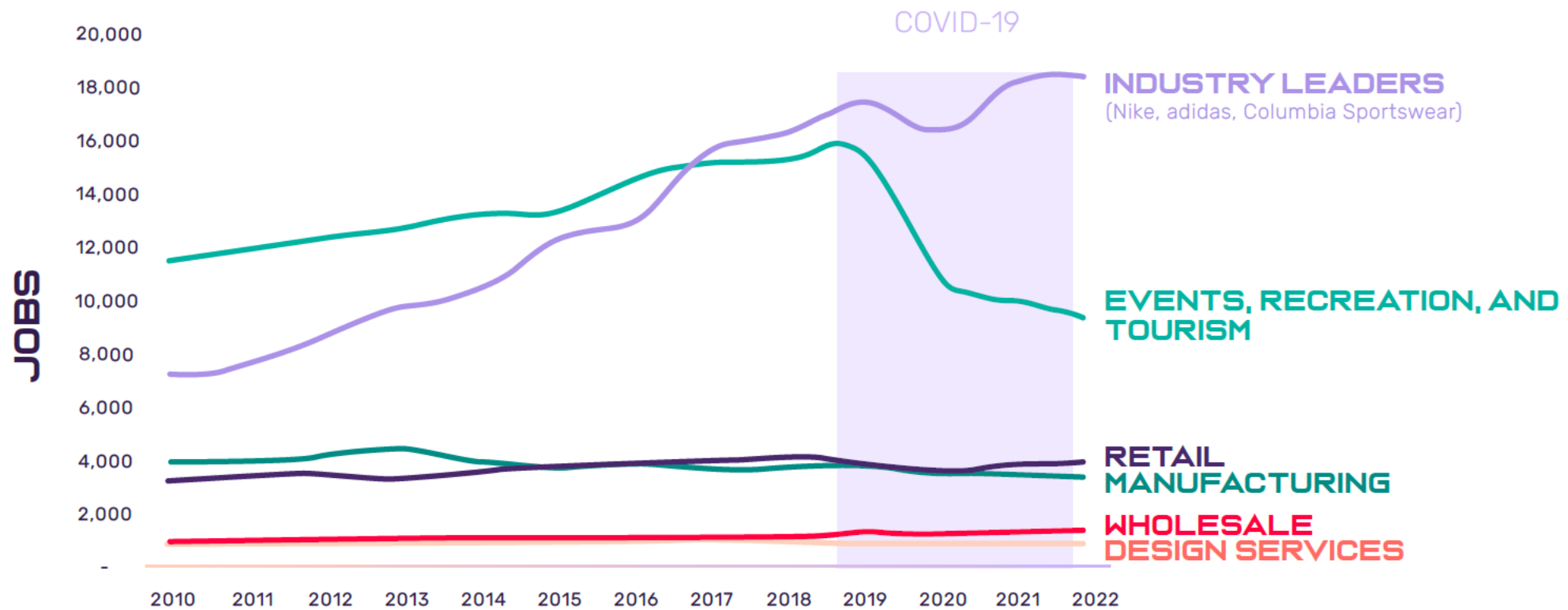
JOB GROWTH IN THE ECOSYSTEM **VS.** ALL SECTORS IN GREATER PORTLAND

Indexed to 2010



GROWTH BY SECTOR

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



ECOSYSTEM BENCHMARKING



COMPARISON REGIONS

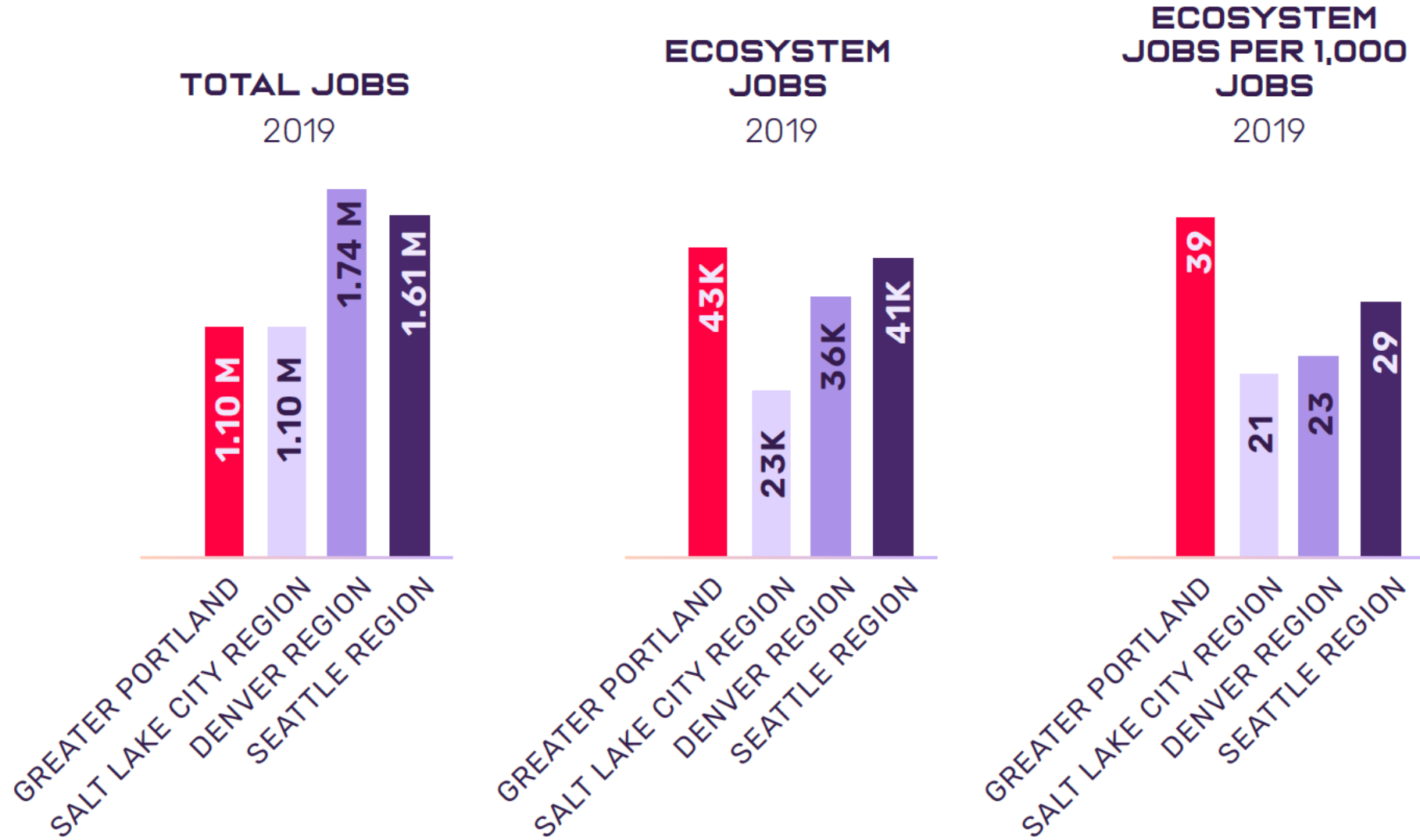


Mt. Tabor Park, Reservoir. Credit: Isaac Lane Koval, Travel Portland

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

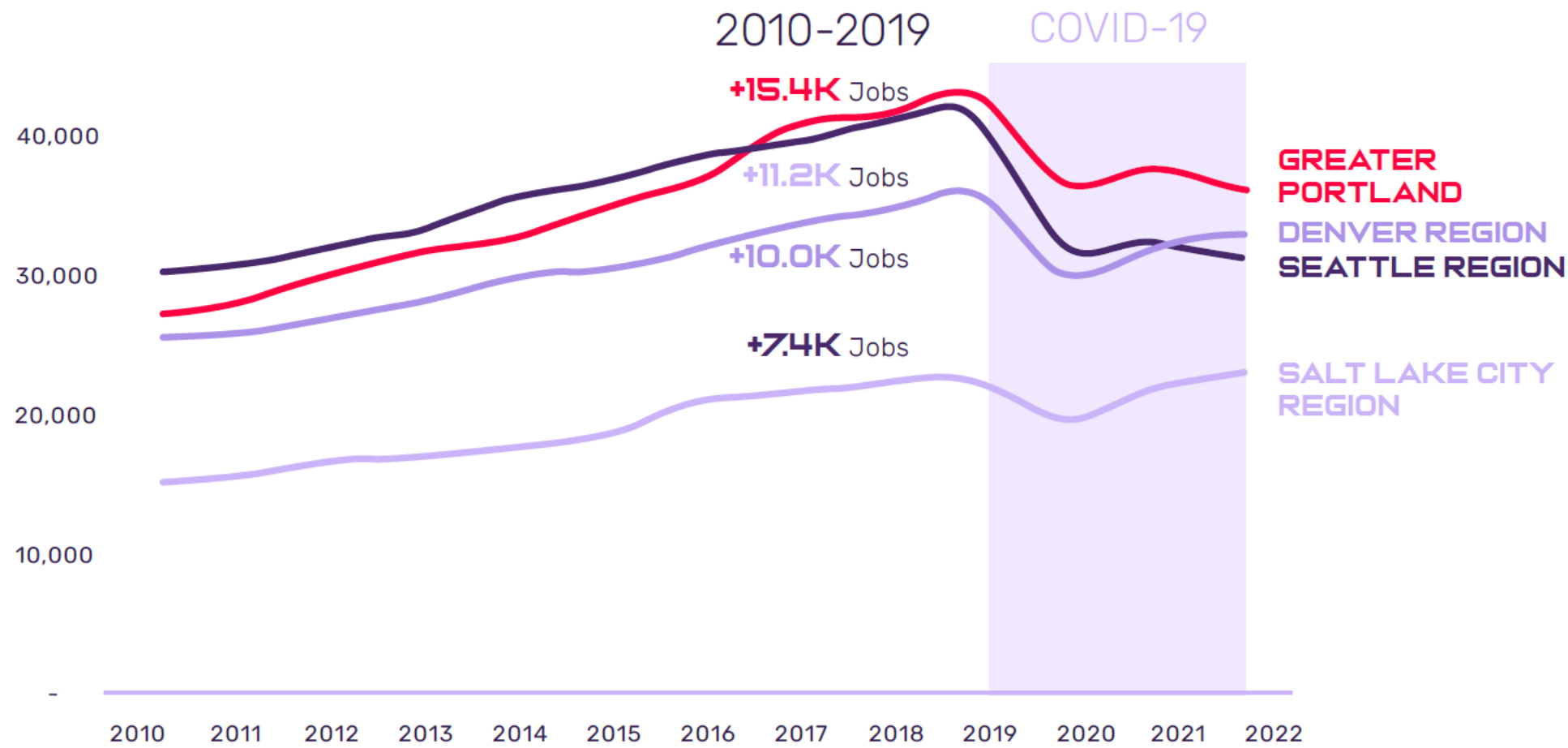


THE GREATER PORTLAND ECOSYSTEM IS LARGEST, DESPITE SMALLER POPULATION AND TOTAL JOBS



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

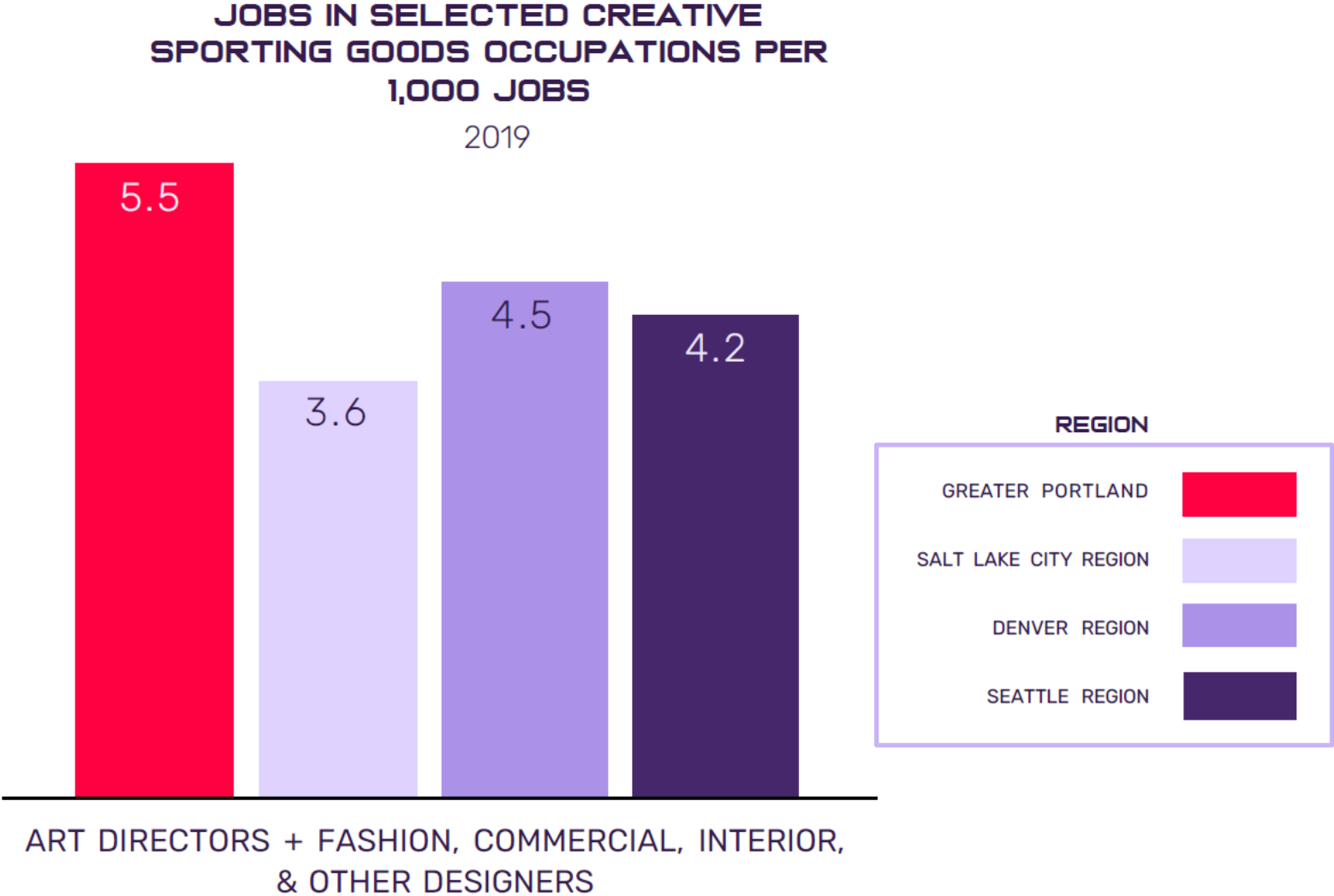
20% WORKERS IN
SEATTLE

HIGH-SKILLED CREATIVE OCCUPATIONS



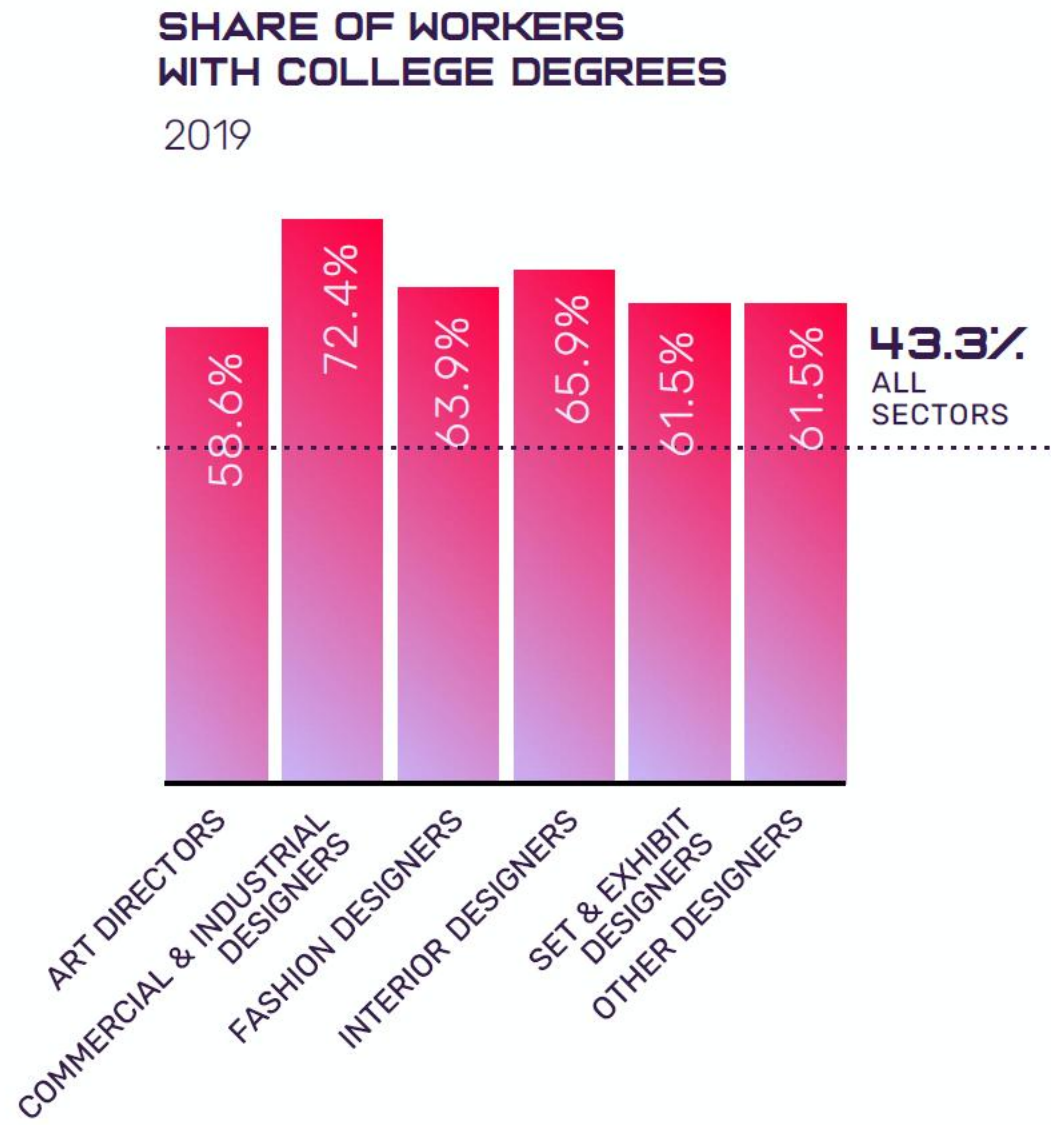
CREATIVE OCCUPATION JOB GROWTH

In Greater Portland
between 2010 and 2019



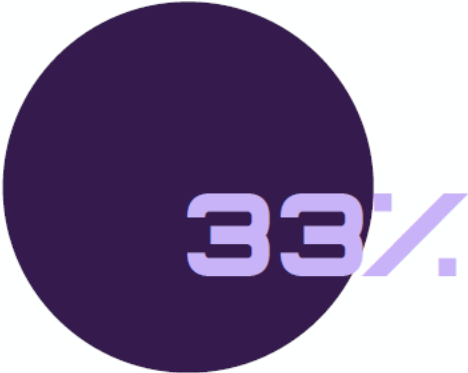
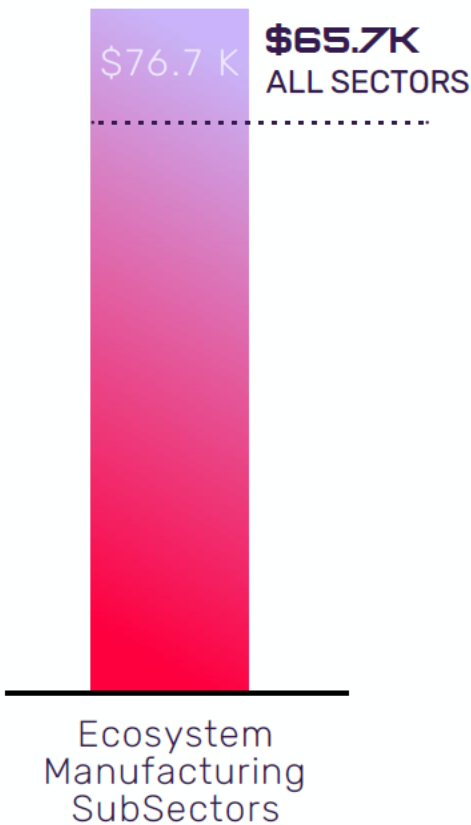
THESE CREATIVE OCCUPATIONS ARE HIGHLY SKILLED AND WELL-PAID

6,947
CREATIVE OCCUPATIONS
 Art directors + fashion, commercial, interior, & other designers

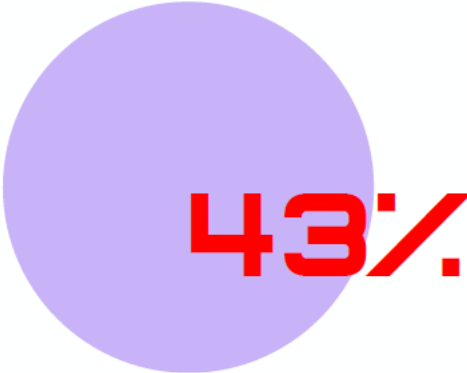


MANUFACTURING SUB-INDUSTRIES OFFER WELL PAYING JOBS TO DIVERSE WORKFORCE AND WORKERS WITHOUT COLLEGE DEGREES

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

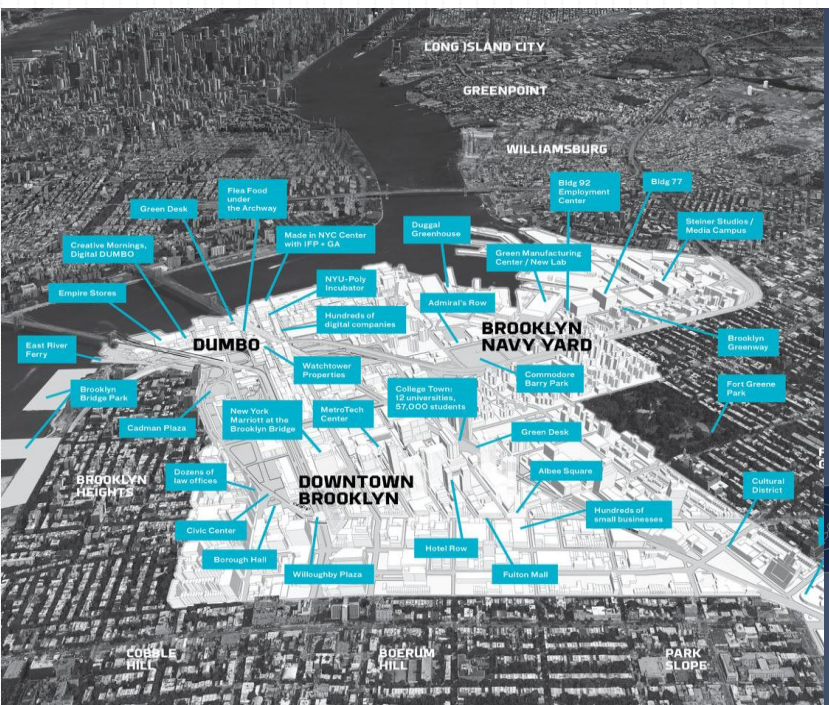
What is our economic brand proposition?

- 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

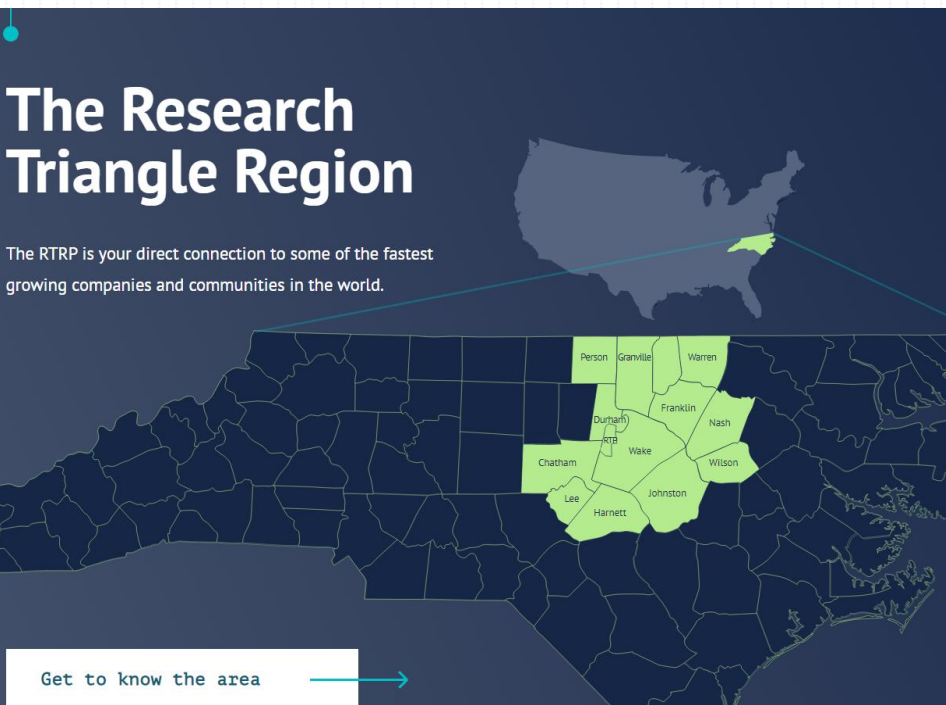


If you name it, they will *know* it...

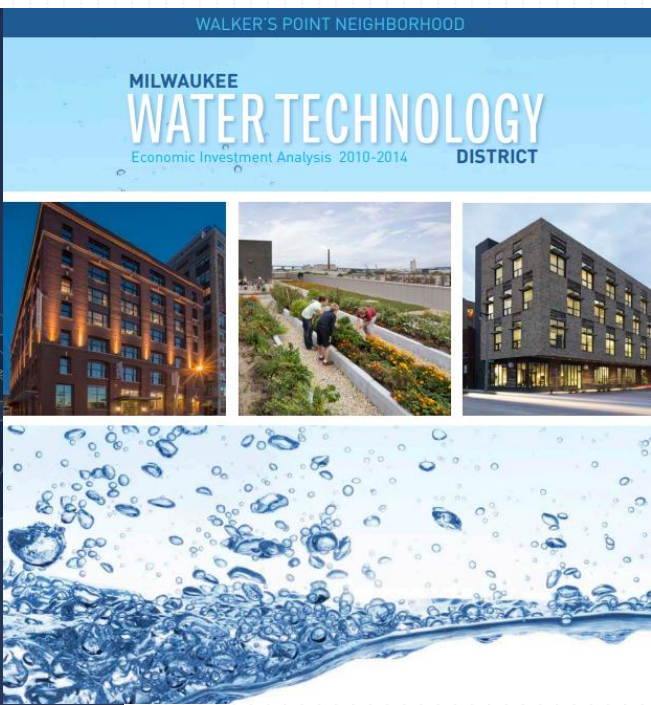
Brooklyn Tech Triangle



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

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