

STATE OF SPORT REPORT

Date: December 12, 2022
Department: Planning, Development & Research
Meeting Date: 12/15/2022

Presenter(s) (if applicable): Andy Shaw,
PBA Staff, Washington County Chamber of
Commerce staff

Length: 30 min

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ISSUE STATEMENT

Council will receive a presentation on the “State of Sport” by representatives of organizations that sponsored the report, including the Portland Business Alliance and Washington County Chamber of Commerce. State of Sport refers to both the status of the broad set of athletic, outdoor, team and recreational businesses, events, and facilities that make up the “ecosystem” of the sports economic cluster, and also the idea that Oregon is uniquely positioned as a state champion to advance the sports and apparel ecosystem.

ACTION REQUESTED

No action is needed at this time. This item is being brought to the Council to help inform and further the conversation about economic impacts of employment and cultivation of a specialty sport sector in our region.

IDENTIFIED POLICY OUTCOMES

The goal of this work session is to inform Metro Council about the state of the sporting industry in our region, including the economic and employment implications. Core findings of the report showed that our region possesses an unparalleled combination of talent, sporting events, outdoor recreation, and athletic culture, and that our region is already a sporting industry leader.

POLICY QUESTION(S)

How can Metro Council respond and prepare for the needs of the sport industry and work to support a specialized economic sector in the region?

POLICY OPTIONS FOR COUNCIL TO CONSIDER STAFF RECOMMENDATIONS

N/A



PORTLAND
BUSINESS ALLIANCE

VALUE OF JOBS COALITION

Oregon: The State of Sport

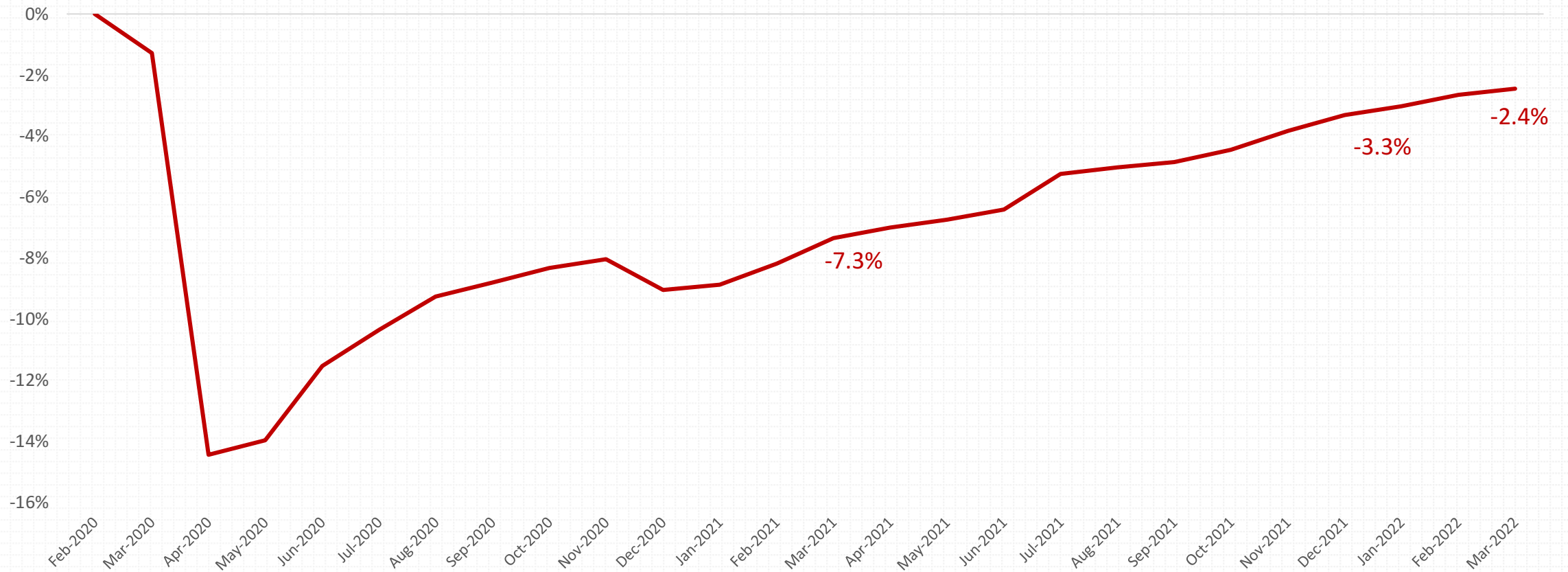
ECONOMIC REPORTS

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)

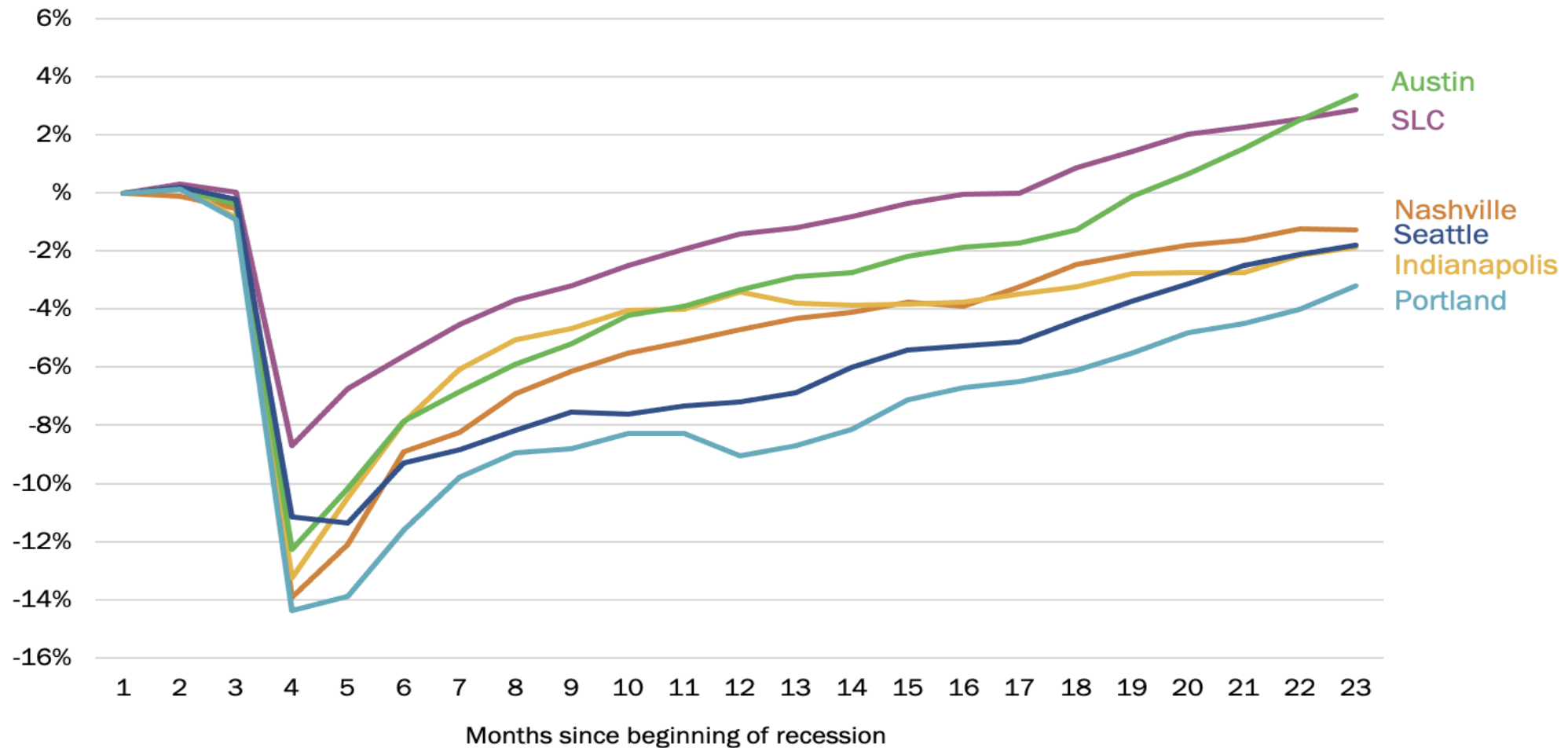
Jobs continue steady gain, expected to recover by early 2023

Portland Metro
Percent Change in Jobs Compared to February 2020



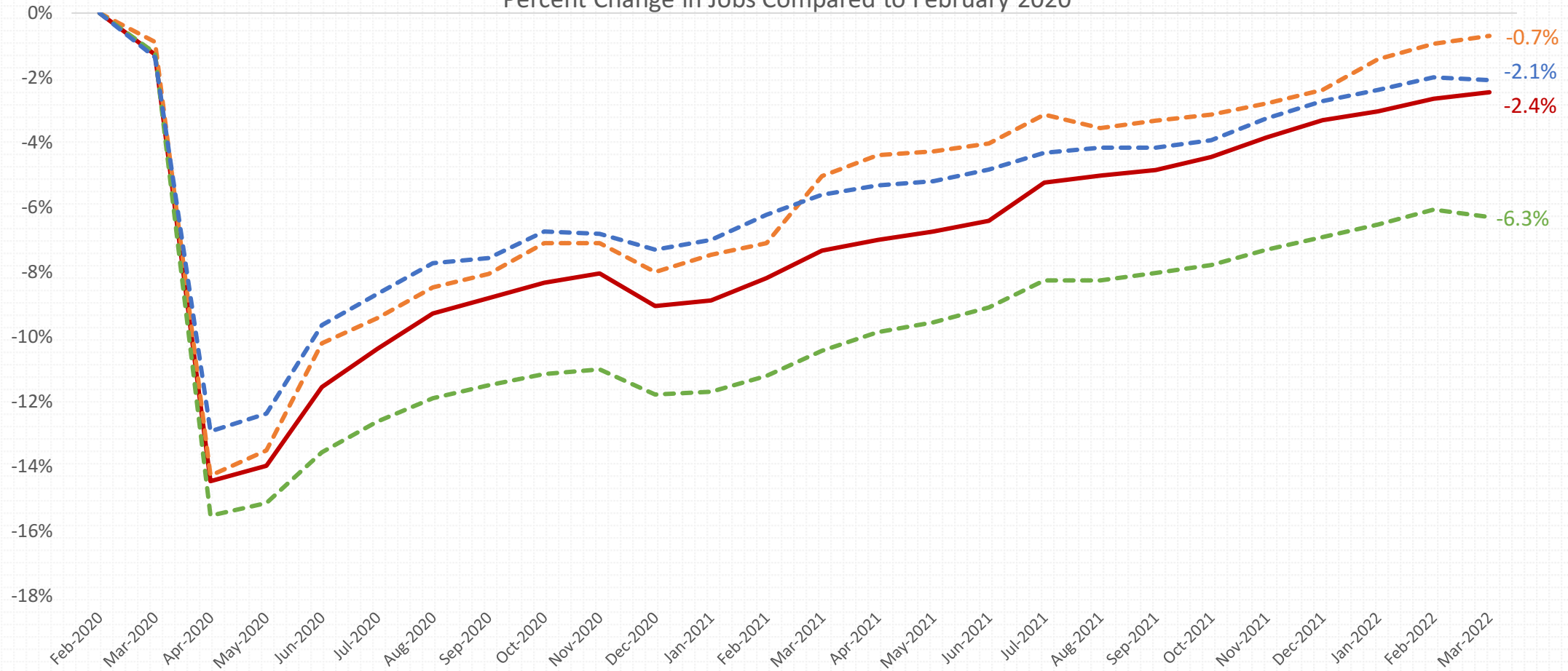
Portland's economy is resilient despite headwinds

Employment Change During the Pandemic – Portland vs. Peer Markets



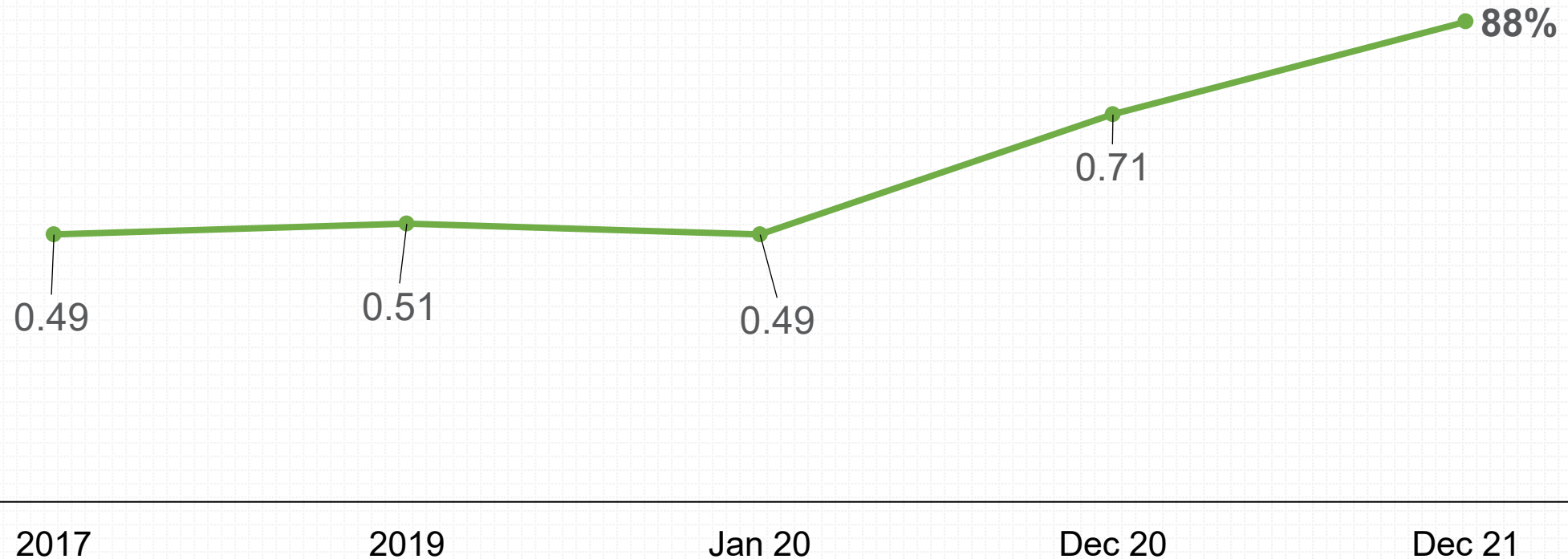
Job losses most heavily concentrated in Multnomah County

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

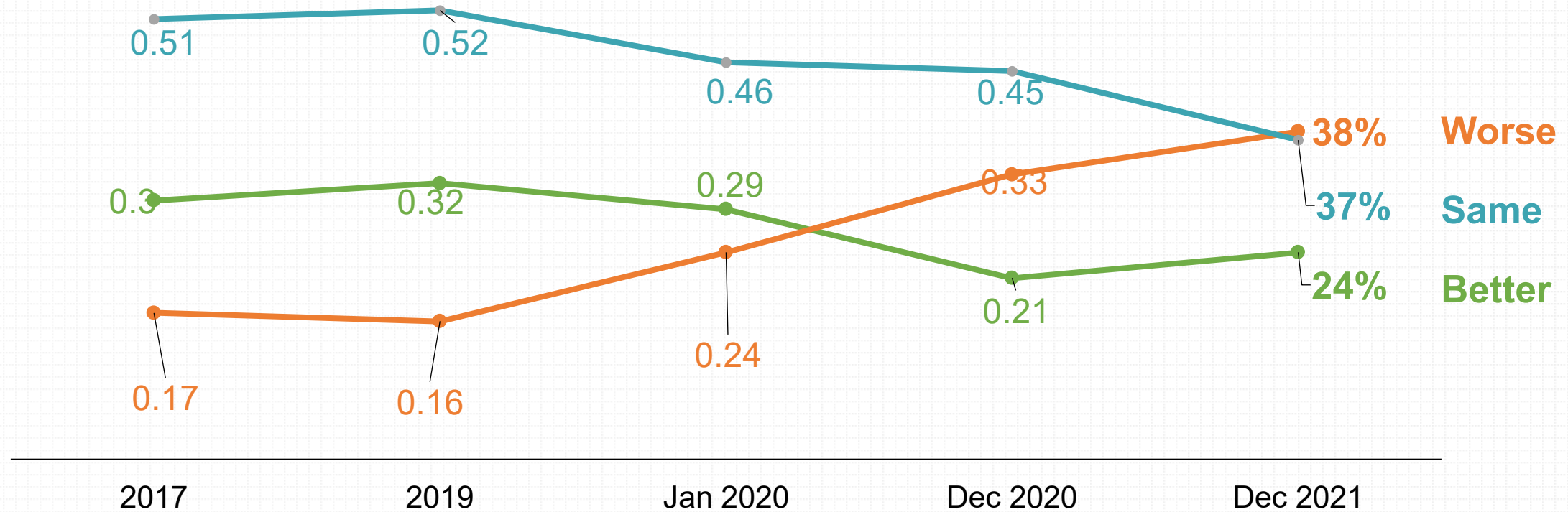


Portland has lost its competitive edge in quality of life and affordability

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?

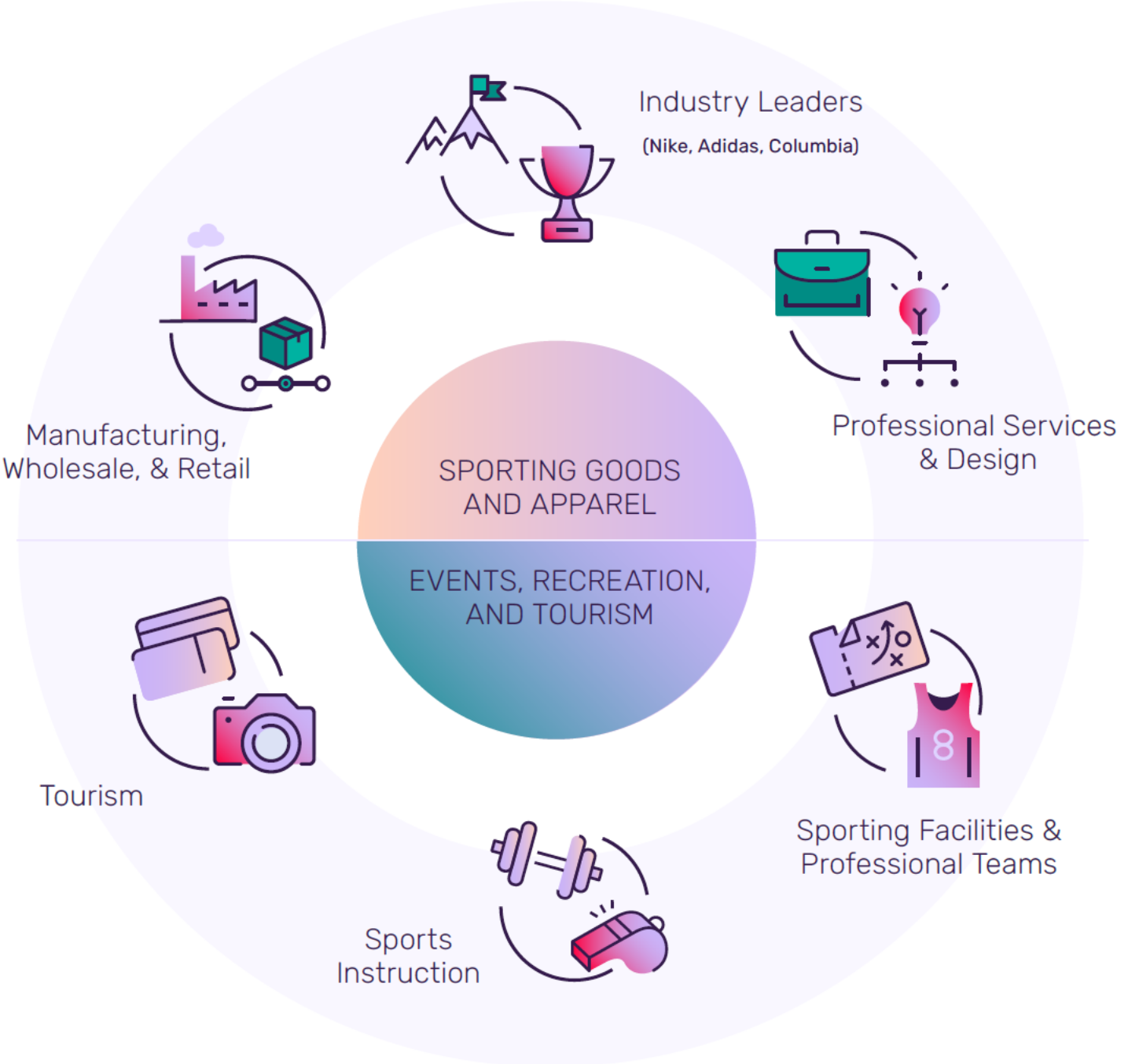
CORE FINDINGS:

- 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

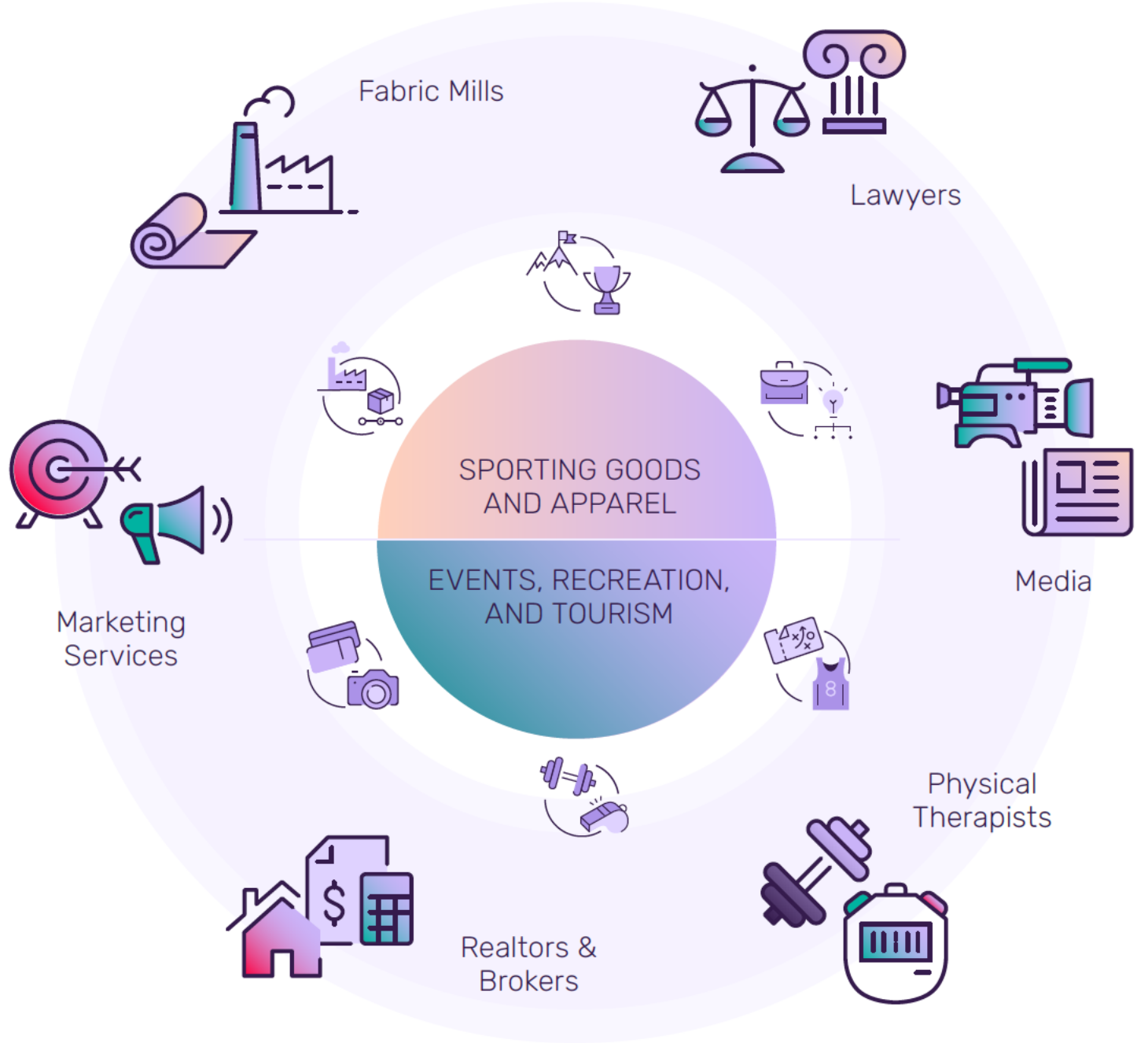


Tanner Springs Park, Cyclist. Credit: Justin Katigbak, Travel Portland

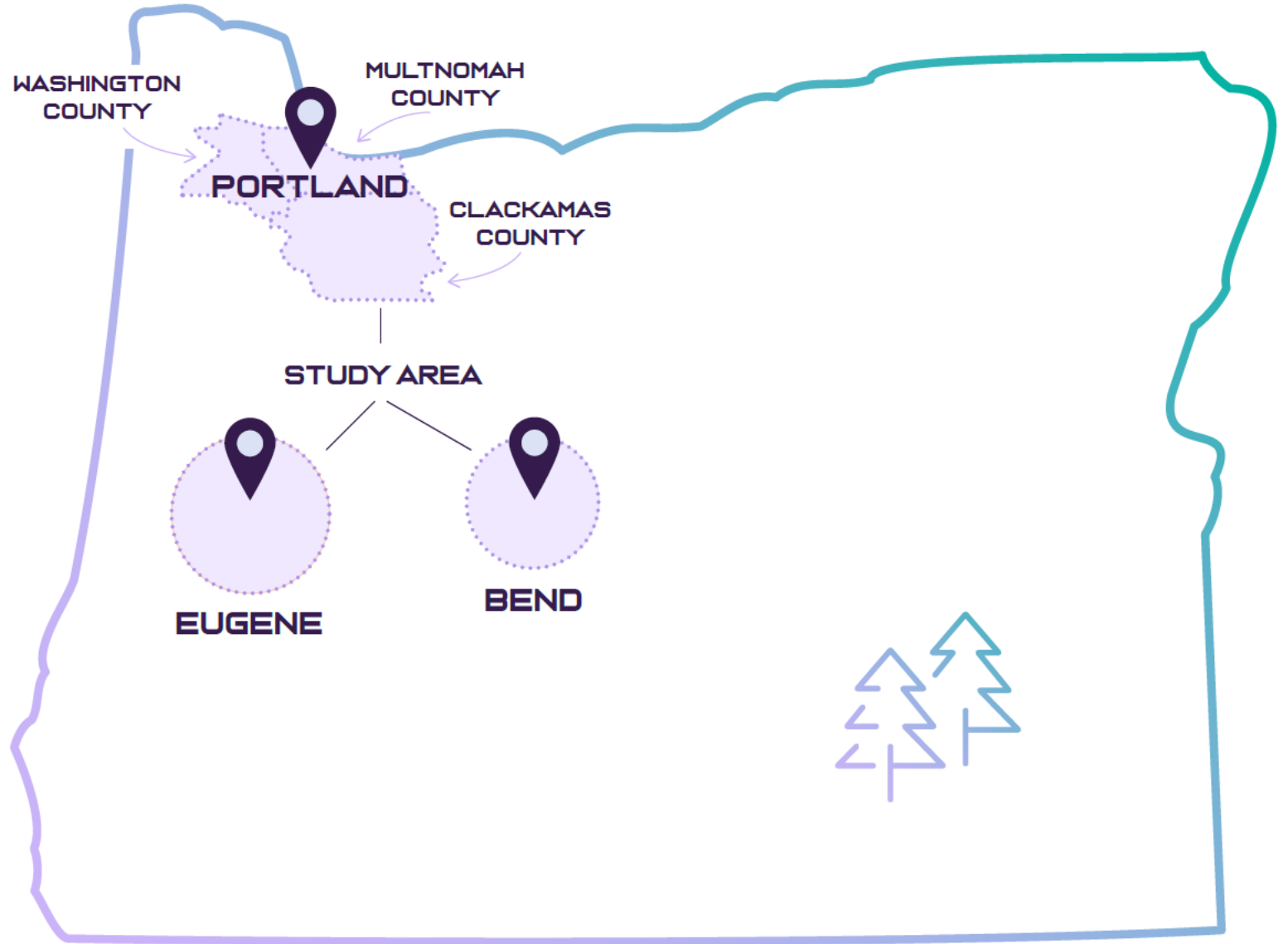
ATHLETIC, OUTDOOR, TEAM, AND RECREATION



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

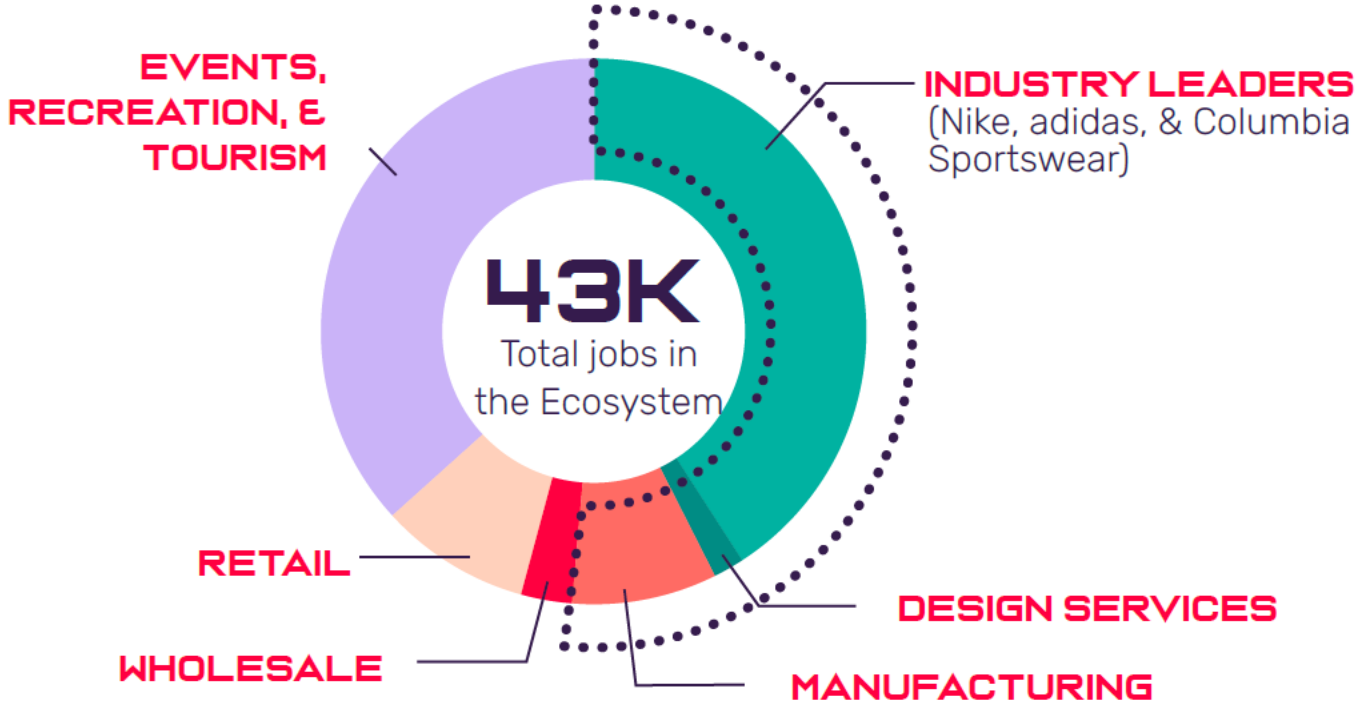
52%

JOBS IN THE ECOSYSTEM

in higher-pay and/or higher-skilled sectors

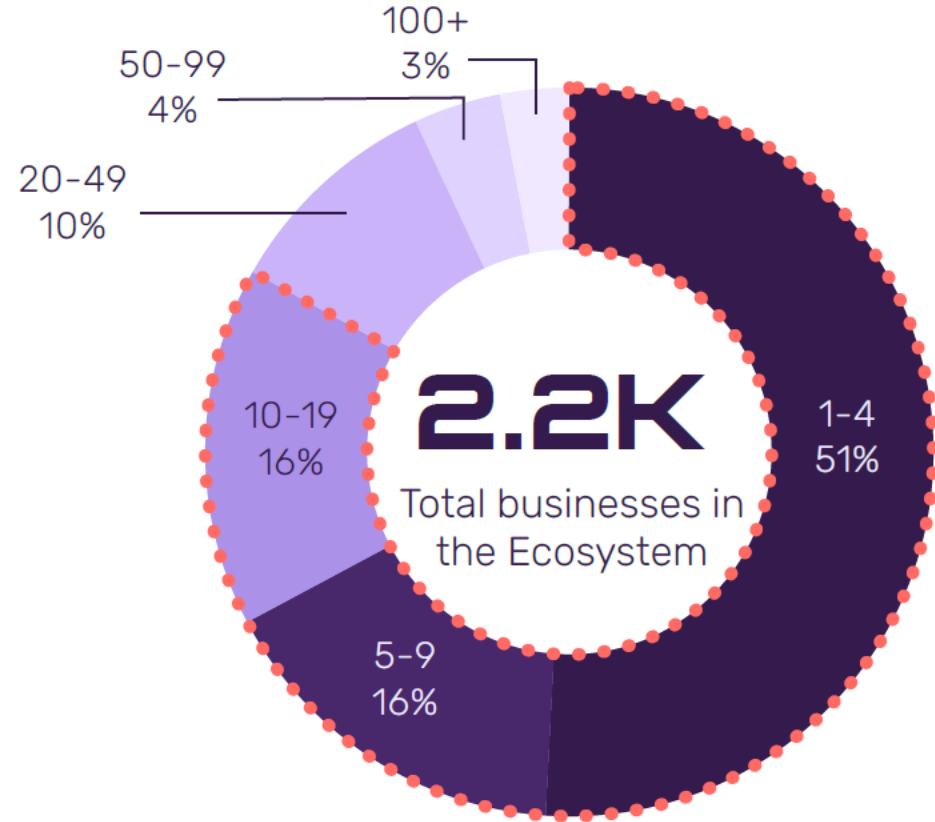


ECOSYSTEM JOBS IN GREATER PORTLAND 2019



SMALL BUSINESSES

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



83%

BUSINESSES IN THE ECOSYSTEM

with fewer than 20 employees

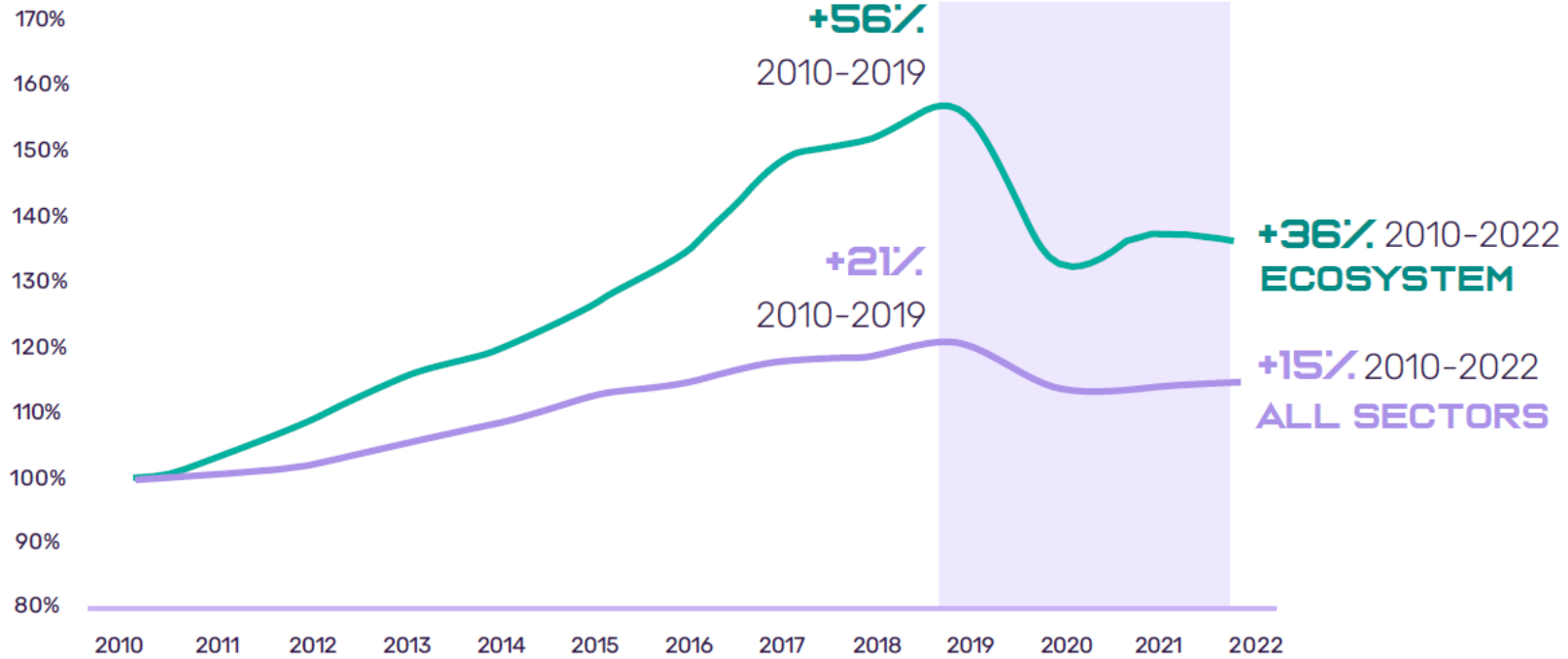


ECOSYSTEM GROWTH

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

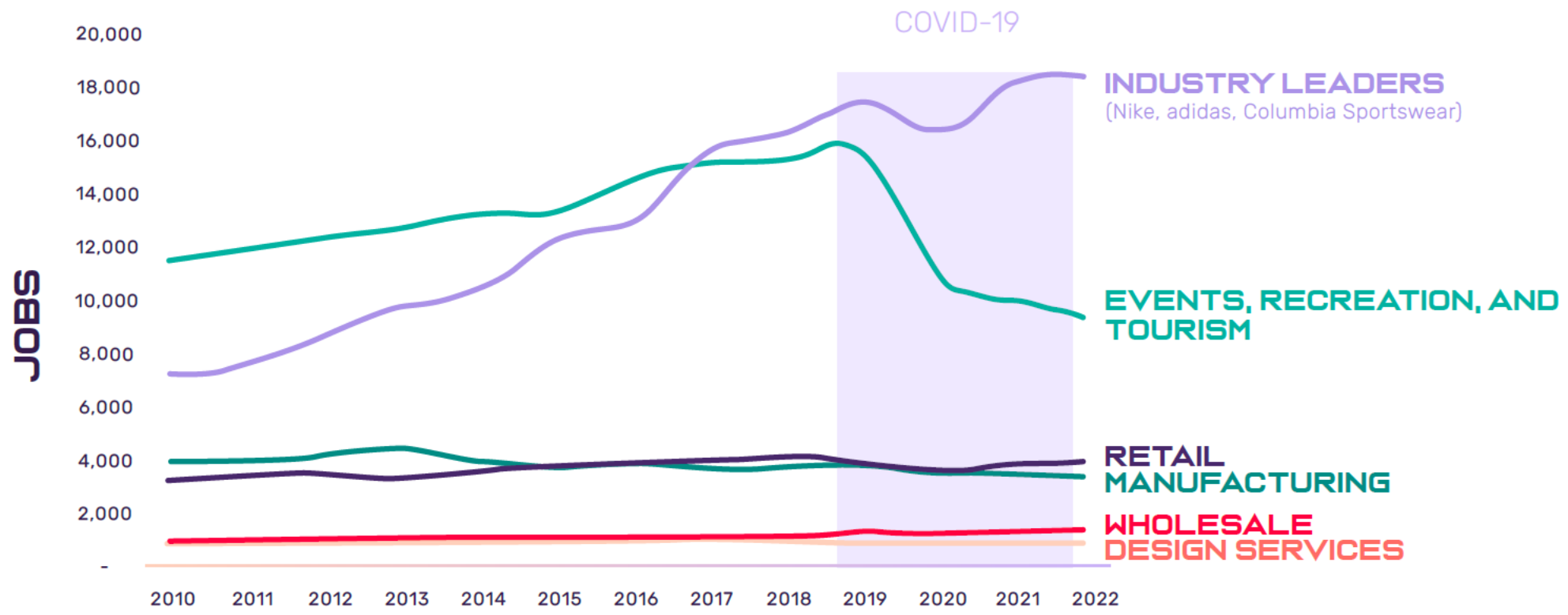
Indexed to 2010

COVID-19

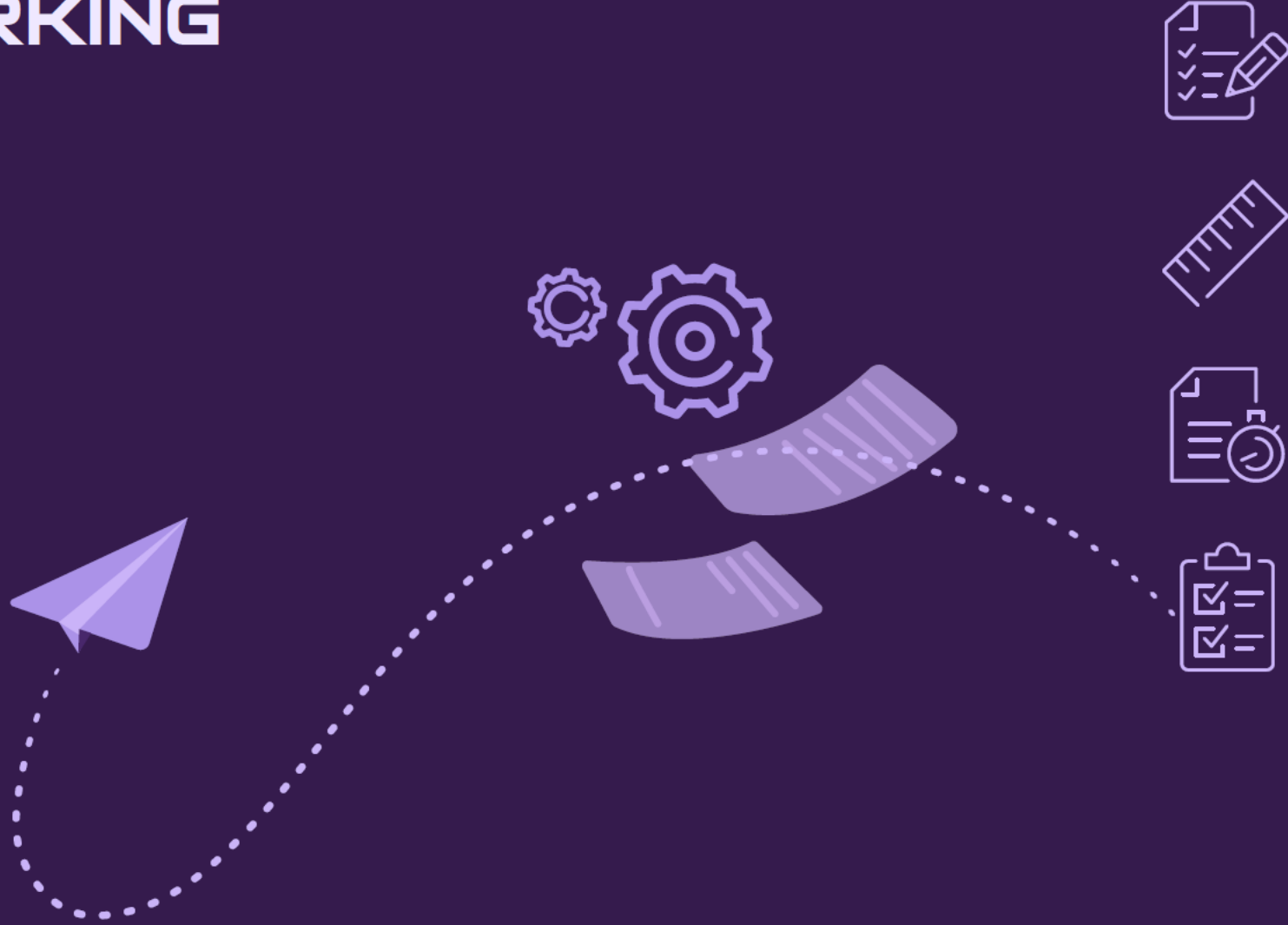


GROWTH BY SECTOR

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



ECOSYSTEM BENCHMARKING



COMPARISON REGIONS

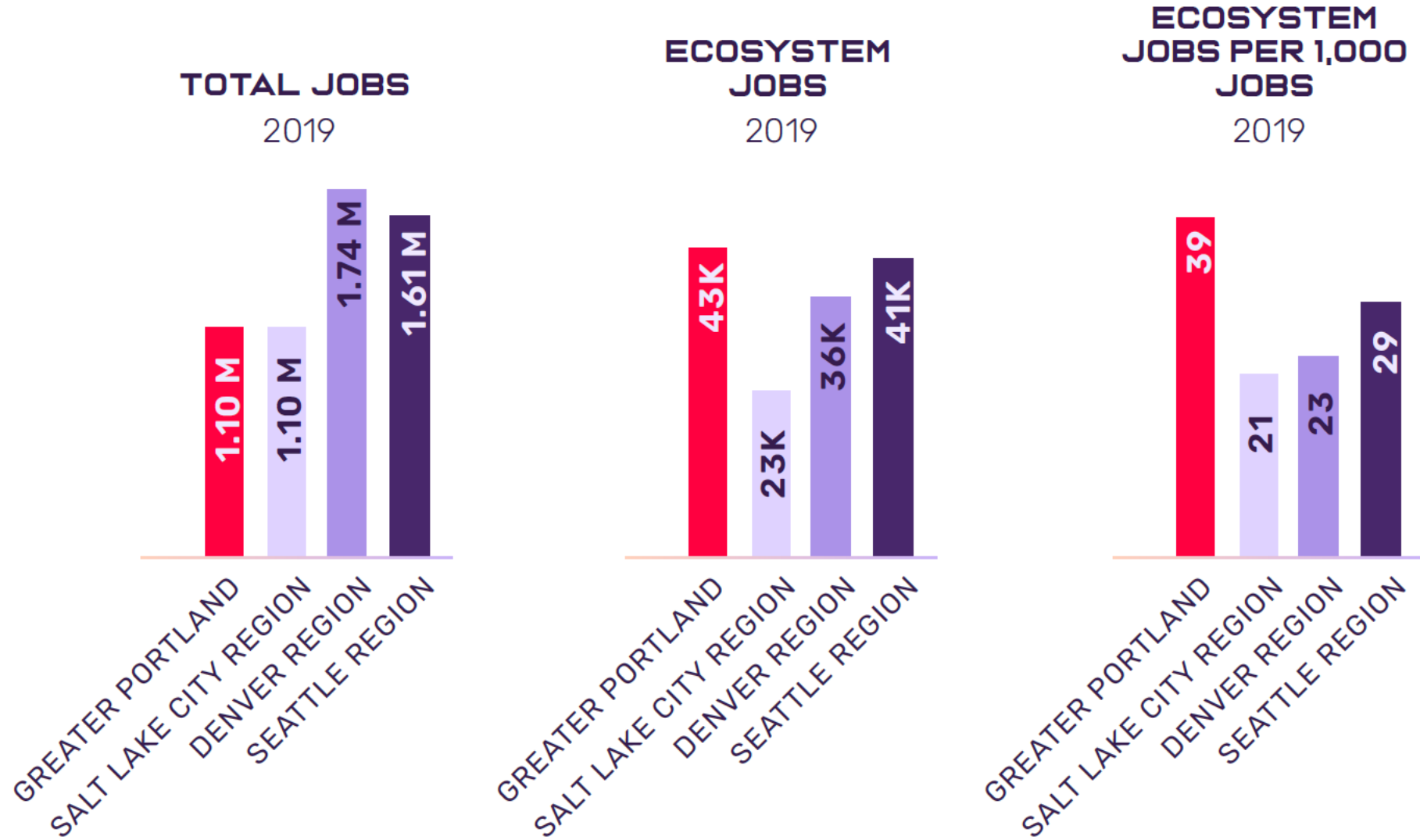


Mt. Tabor Park, Reservoir. Credit: Isaac Lane Koval, Travel Portland

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

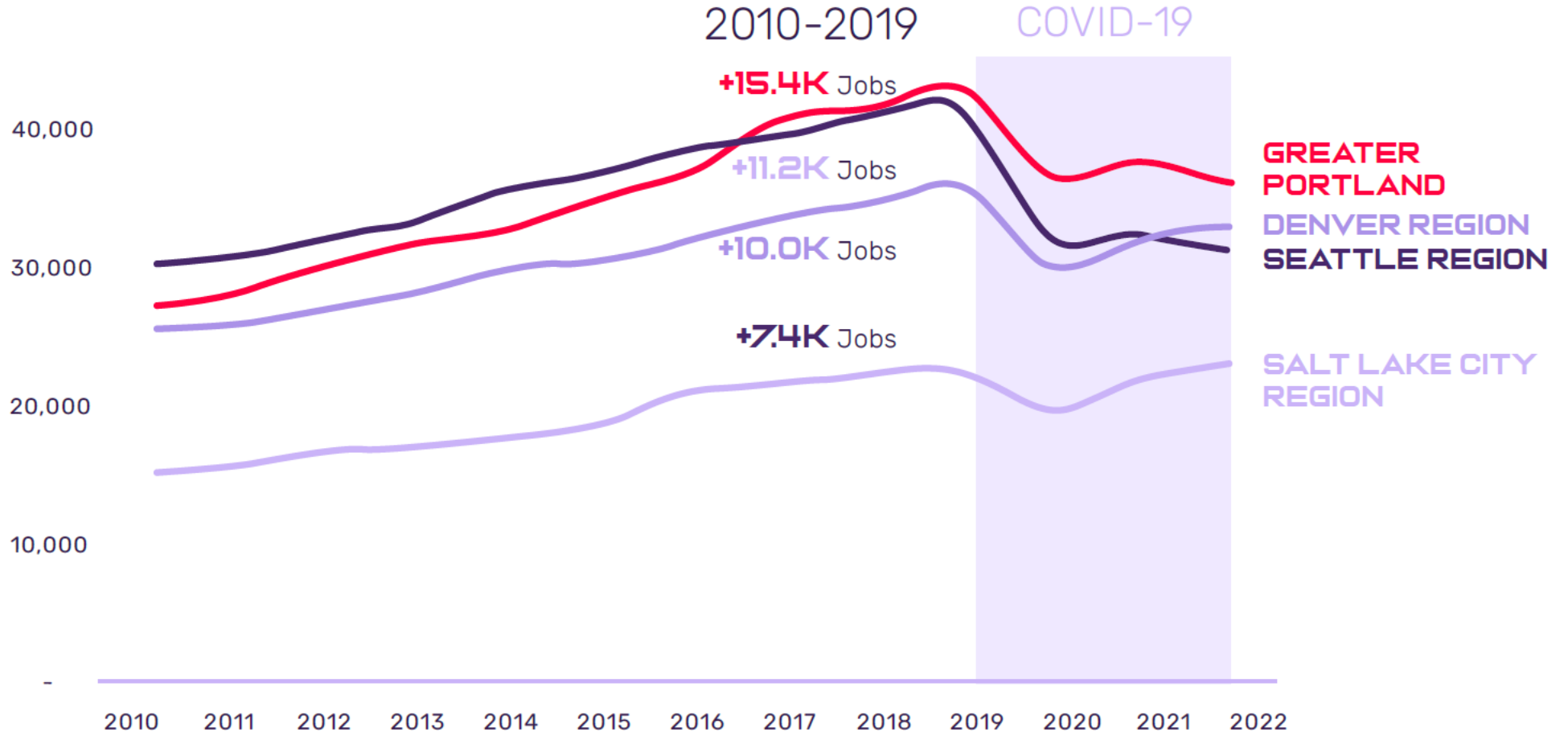


THE GREATER PORTLAND ECOSYSTEM IS LARGEST, DESPITE SMALLER POPULATION AND TOTAL JOBS



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

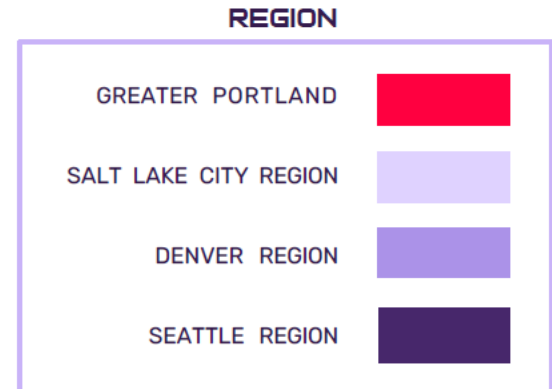
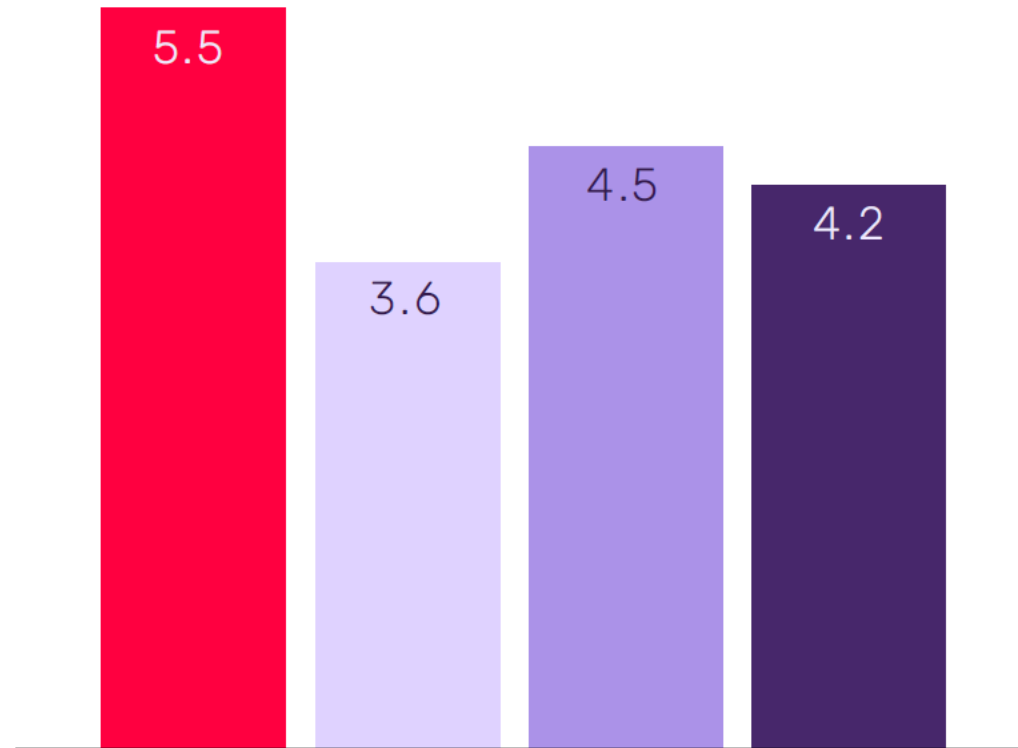
16% WORKERS IN
DENVER

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

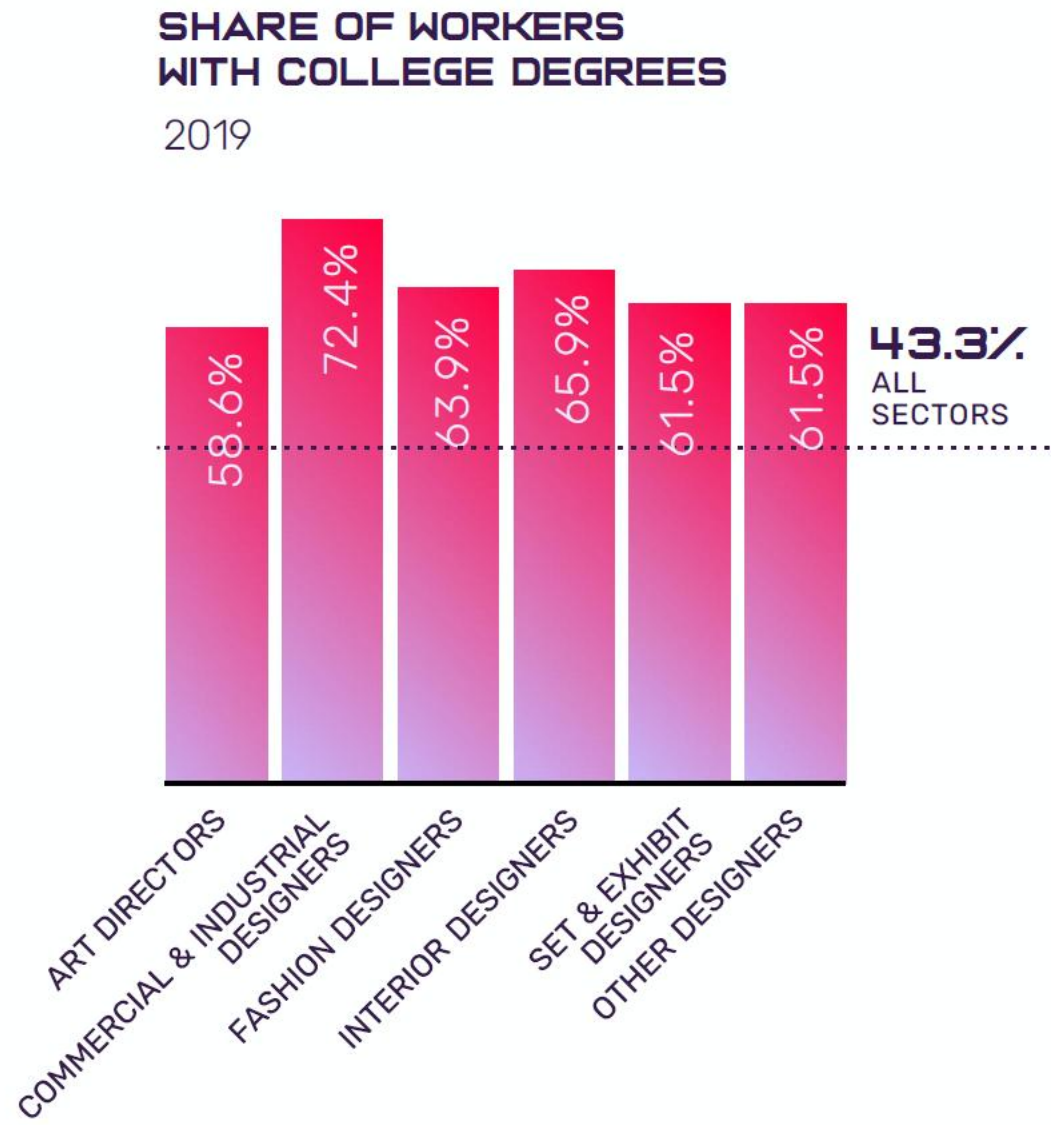
60%

CREATIVE OCCUPATION JOB GROWTH

In Greater Portland between 2010 and 2019

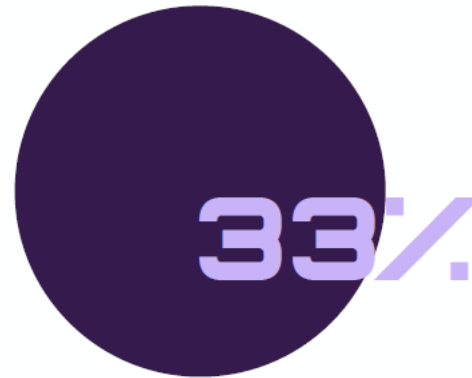
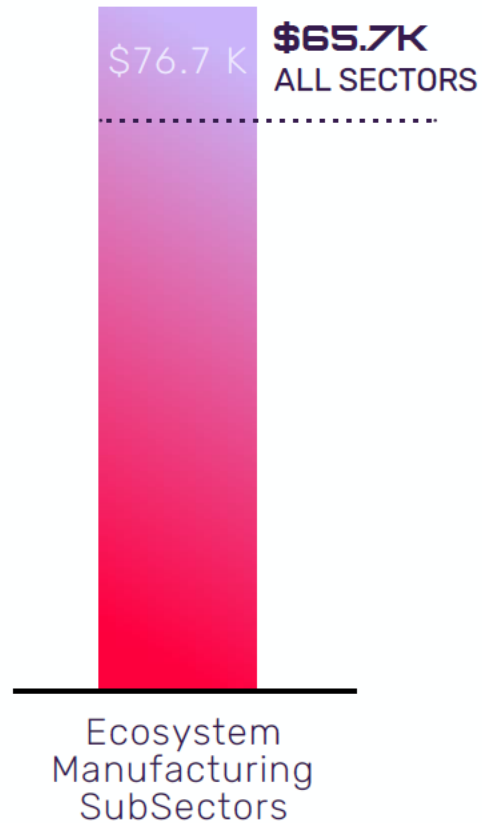
THESE CREATIVE OCCUPATIONS ARE HIGHLY SKILLED AND WELL-PAID

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



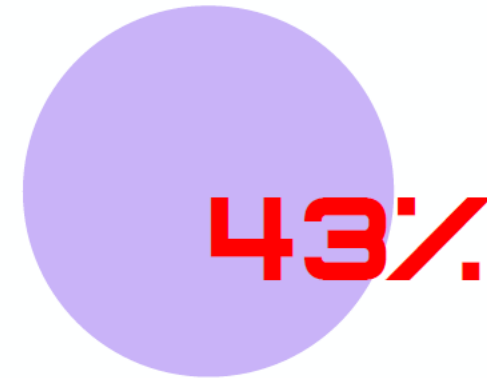
MANUFACTURING SUB-INDUSTRIES OFFER WELL PAYING JOBS TO DIVERSE WORKFORCE AND WORKERS WITHOUT COLLEGE DEGREES

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

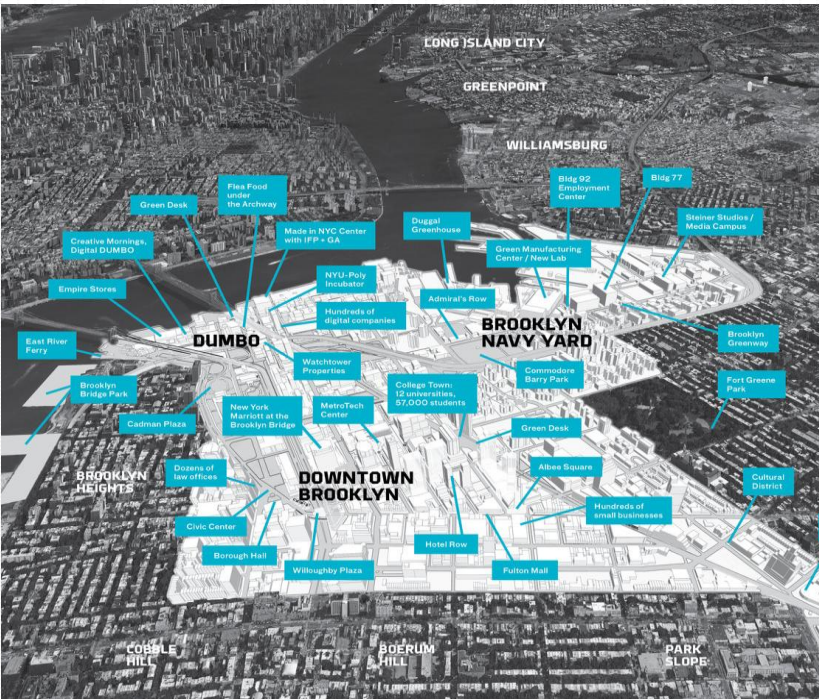
What is our economic brand proposition?

- 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

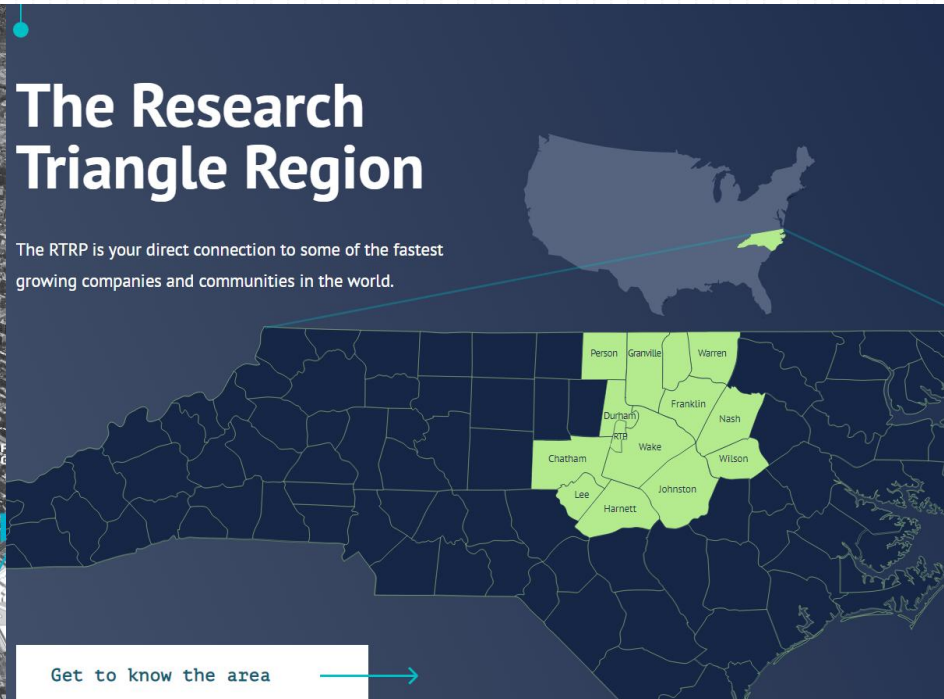


If you name it, they will *know* it...

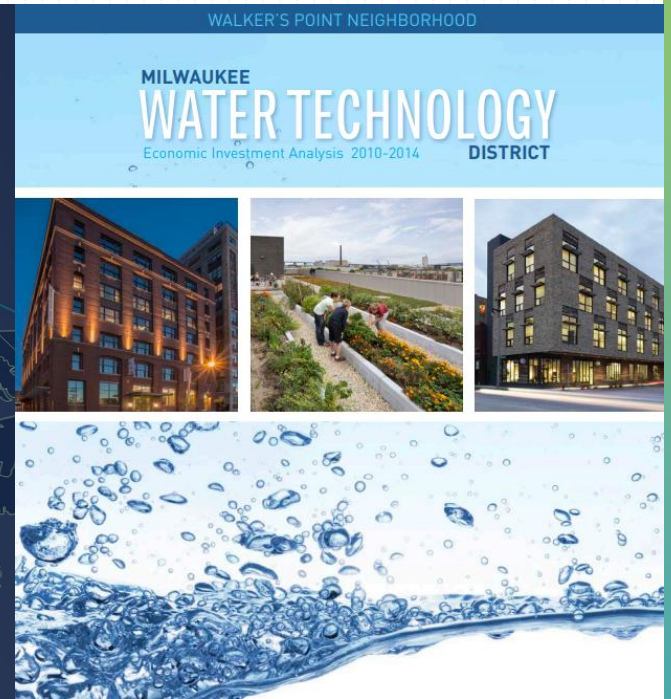
Brooklyn Tech Triangle



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

ACKNOWLEDGEMENTS

Weinstein PR

HR&A

PORTLAND
BUSINESS ALLIANCE

PRESENTING SPONSOR

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SPONSORS

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Duncan Wyse, Oregon Business Council

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Curtis Robinhold, Port of Portland

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Jeff Miller, Travel Portland

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STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The report:

- Details the statewide economic impacts of employment and manufacturing driven by companies, through events, and retail sales
- Identifies trends across the entire sports ecosystem
- Evaluates comparison regions to Greater Portland using benchmark analytics
- Explores opportunities for increasing well-paying jobs.

BACKGROUND

This is part of the series of Council work session panels on industry, manufacturing, and economic readiness. The first panel focused on industry and manufacturing and included perspectives from Willamette Technical Fabricators, Oregon Business & Industry, and ECONorthwest. This panel highlighted barriers to development within the region, including site readiness, available land, and workforce readiness (training, education, and outreach).

Our second panel presented Council the Site Readiness Toolkit developed in 2020 by the Port of Portland in partnership with Metro staff and 13 other jurisdictions in the region. The toolkit identifies barriers to development and includes roadmaps to determine specific tools and revenue returns available in support of site development.

The third panel presented on the importance of siting and recruiting new industrial businesses and securing locations for retention and expansion within the region in job creation and economic development.

Metro also has an interest in supporting a specialized sport sector because of the tourism and employment opportunities, including opportunities for the Convention Center and the Expo Center.

ATTACHMENTS

Slides to be sent before presentation.

[For work session:]

- Is legislation required for Council action? Yes No
- If yes, is draft legislation attached? Yes No
- What other materials are you presenting today? Slides to be sent before meeting

