

Market Research

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Overview

Capitalizing on Portland's high remote work density by offering an affordable, ethically sourcing third space.

Portland's coffee culture is undergoing a 'fourth wave' evolution, characterized by a shift toward equity and community-focused business models, ¹ ¹⁷. With 21% of the metro area workforce working remotely as of 2023, the city maintains one of the highest work-from-home rates in the nation, ²⁶ ²⁴. However, local consumers increasingly face high prices, with specialty lattes often exceeding \$8, ⁴⁵ and struggle to find venues that balance workspace needs with affordability. This business addresses the gap for a 'third space' that serves the dominant Millennial demographic ²⁸ with flexible hours, reliable amenities, and the ethical sourcing standards Portlanders demand. ¹⁷

Market Size

Total Addressable Market

\$47,800,000,000

The Total Addressable Market represents the U.S. specialty coffee market size in 2024. ³

Serviceable Market

\$1,600,000,000

The Serviceable Available Market is the specific revenue of the Coffee & Snack Shops industry in Oregon, projected for 2026. ¹⁶

Demographics



Gender Breakdown

Coffee consumption is broadly balanced, though specialty coffee trends slightly higher among female consumers and inclusivity is a key value in the local market. 1 8



48%

Male-Identifying



50%

Female-Identifying

1%

Non-binary

1%

Prefer not to say

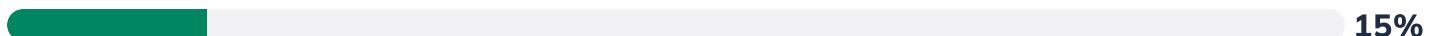


Household Income

The core revenue base consists of middle-to-upper-middle income remote workers who have discretionary income for daily specialty beverages but remain price-conscious regarding inflation, 29 45

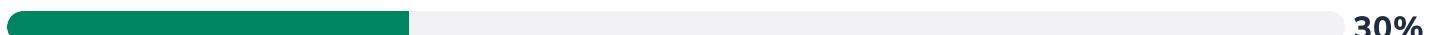
Under \$40k

Students and part-time creatives



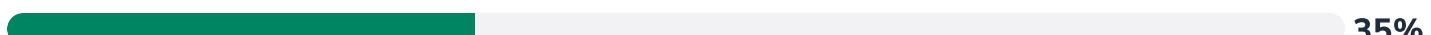
\$40k-\$74k

Young professionals and service workers



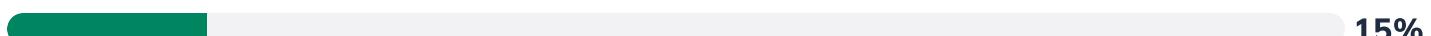
\$75k-\$124k

Established remote workers



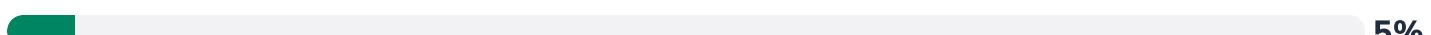
\$125k-\$199k

Tech sector professionals



\$200k+

Affluent dual-income households



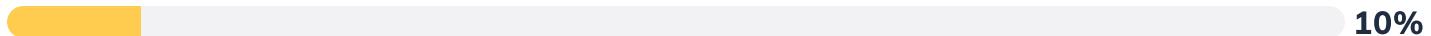


Age Distribution

Millennials (25-40) are the dominant demographic, comprising the largest share of remote workers and the highest rate of specialty coffee consumption, [28](#) [29](#)

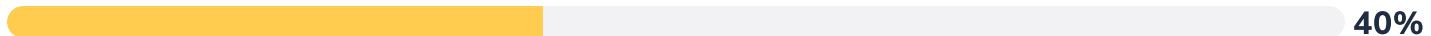
Under 25

Gen Z students and trend-seekers



25-34

Primary Millennial remote workforce



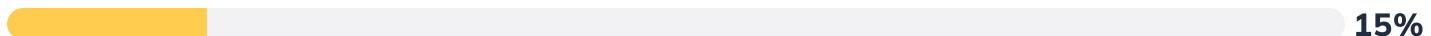
35-44

Established professionals and parents



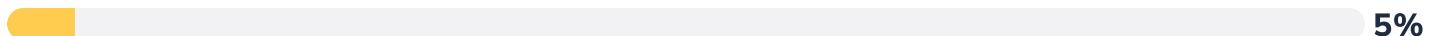
45-54

Gen X hybrid workers



55+

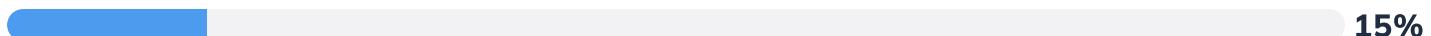
Retirees and traditional drinkers



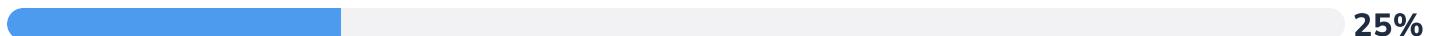
Education Levels

Portland has a highly educated population, which correlates strongly with specialty coffee consumption and appreciation for ethical sourcing narratives, [12](#) [28](#)

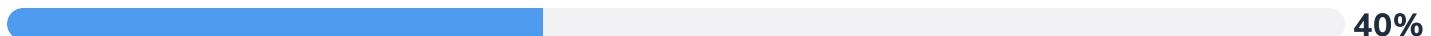
High School/Trade Certification



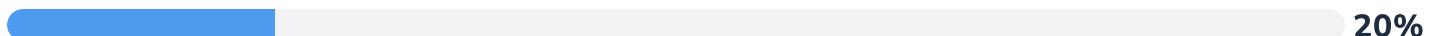
Some College/Associate Degree



Bachelor's Degree



Master's/Professional Degree/PhD



Target Audience



Target Customer Profile

Age Range

25-40

Education

Bachelor's Degree

Household Income

\$50,000 - \$110,000

The primary target is the Millennial remote worker living in neighborhoods like the Pearl District or Buckman, ⁴⁹. This group values 'fourth wave' equity and ethics, ¹ relies on cafes as primary workspaces due to high home office isolation, ²⁶ and seeks high-quality products without the 'tourist' markup.

Key Pain Points

- High costs, with specialty lattes reaching \$8+ in the city ⁴⁵
- Difficulty finding cafes with reliable seating and Wi-Fi for work ²⁰
- Inconsistent operating hours that do not align with flexible work schedules ¹⁸

Goals & Motivations

- Finding a 'third space' for productivity and community connection ²¹
- Supporting businesses that align with ethical and equitable values ¹⁷
- Accessing high-quality specialty coffee at a fair price point ⁴⁶

Core Values

Ethical Sourcing

Community Equity

Work-Life Balance

Local Support

Customer Personas



The Remote Nomad

Alex Chen

Alex is a freelance UX designer who has been working remotely since 2020. Living in a small apartment in Buckman, he finds his home office stifling and actively seeks 'third places' to work for 3-4 hours at a time. He treats coffee shops as his office rental but is increasingly frustrated by the rising cost of daily visits and venues that are hostile to laptop users.

Age

32

Location

Buckman, Portland, OR

Family Status

Single, lives with a roommate

Education

BFA in Digital Design

Profession

Freelance UX/UI Designer

Opportunities

- **Subscription Model:** Offer a 'bottomless' drip coffee or monthly membership to secure recurring revenue from high-frequency visitors.
- **Ergonomic Workstations:** Designate specific areas with accessible power outlets and reliable Wi-Fi to attract the 21% of Portland's workforce that is remote.
- **Mid-Day Meal Deals:** Create affordable lunch combos to increase average transaction value during extended stays.

Pain Points

- Paying \$8+ for a single latte with alternative milk makes daily visits unsustainable.
- Anxiety about 'overstaying welcome' in small shops with limited seating.
- Inconsistent Wi-Fi or lack of power outlets in 'aesthetic' cafes.

Needs

- Reliable, high-speed internet connection.
- Affordable staples (Americanos/Drip) under the \$4.15 average.
- A welcoming atmosphere that doesn't pressure him to leave after 45 minutes.

"I need a place that isn't my bedroom to get work done, but I can't afford a \$200 coworking membership or an \$8 latte every single day."



The Value-Driven Parent

Sarah Jenkins

Sarah is a busy working mother living in the family-friendly Sellwood-Moreland neighborhood. She balances a hospital shift schedule with picking up her kids. She values high-quality coffee as a necessary fuel but feels priced out of the 'hipster' specialty market. She often struggles to find safe, comfortable places open past 3 PM where she can bring her children without judgment.

Age

38

Location

Sellwood-Moreland,
Portland, OR

Family Status

Married, 2 children (ages
6 & 9)

Education

BS in Nursing

Profession

Nurse Administrator
at OHSU

Opportunities

- Extended Operating Hours:** Stay open until 6:00 PM or 7:00 PM to capture the after-school/post-work crowd that most cafes miss.
- Family Bundle Pricing:** Offer 'Coffee + Kid's Cocoa/Pastry' bundles to make the outing feel affordable for a group.
- Community Events:** Host family-friendly weekend morning events to build loyalty within the neighborhood.

Pain Points

- Most good coffee shops close at 3 PM, right when she needs a pick-me-up.
- Feeling judged when bringing energetic kids into quiet, austere specialty cafes.
- The high cost of buying treats for the whole family prevents frequent visits.

Needs

- Flexible hours that accommodate early mornings and late afternoons.
- A spacious layout where a stroller or active kids aren't a nuisance.
- Quick, friendly service that understands a parent's rush.

"I just want a really good cup of coffee at 4 PM without having to drive to a drive-thru chain, and a place where my kids are actually welcome."



The Conscious Tastemaker

Jordan Rivera

Jordan is a Gen Z marketing coordinator living in the Pearl District. They view coffee consumption as an identity statement, prioritizing ethical sourcing, minority-owned businesses, and unique flavor profiles over brand loyalty. Jordan is willing to pay for quality but demands transparency and 'Instagrammable' experiences that align with their social values.

Age

26

Location

Pearl District,
Portland, OR

Family Status

Single

Education

BA in Communications

Profession

Social Media
Coordinator

Opportunities

- Transparent Sourcing Storytelling:** Highlight farm-level details and social impact initiatives (e.g., clean water projects) on signage to appeal to ethical consumers.
- Signature Seasonal Drinks:** Create visually appealing, unique beverages (like Egyptian sand coffee or floral lattes) that drive social media sharing.
- Inclusive Menu Options:** Offer high-quality vegan/gluten-free pastries and oat milk as standard options, not afterthoughts.

Pain Points

- Generic coffee shops that lack a distinct mission or vibe.
- Lack of transparency regarding where beans are sourced.
- Boring menu options that don't allow for customization or exploration.

Needs

- Products that reflect diversity and ethical practices.
- Aesthetically pleasing environment for social media content.
- Innovative flavor combinations they can't make at home.

"If I'm buying coffee, I want to know it's not exploiting growers, and honestly, I want it to taste like something I've never had before."

Trends & Behaviors



Market Growth

The U.S. specialty coffee market is projected to grow at a CAGR of 9.5% through 2030, ³ while the specific Oregon coffee shop industry has seen 3.9% annual growth. ¹⁶



Market Trends

- Rise of 'Fourth Wave' coffee focusing on equity and community impact ¹
- Sustained high levels of remote work (21%) driving demand for workspace cafes ²⁶
- Consumers prioritizing experiential beverages and customized drinks ³⁰
- Increasing price sensitivity due to inflation, with lattes averaging over \$4.15 ⁴⁶



Buying Behaviors

- High frequency of past-week consumption (64% for ages 25-39) ²⁹
- Preference for locally owned businesses over national chains ¹⁸
- Willingness to pay for alternative milks and customizations despite cost sensitivity ⁴⁵



Market Risks

- Intense competition from established local brands and high density of shops ³⁴
- Rising operational costs including rent and minimum wage in Portland ⁴²
- Consumer fatigue with rising prices for specialty beverages ⁴⁵



Channels

- Social media marketing emphasizing visual appeal and ethics ⁴⁰
- Partnerships with local remote work communities ²²
- Pop-up events to test concepts before full launch ⁴¹

Competition

Case Study Coffee

Portland, OR (Multiple Locations)

A well-established local roaster known for providing ample seating and a conducive environment for working professionals.

Strengths

- Strong reputation for workspace suitability 22
- Established brand loyalty
- High-quality direct trade coffee

Weaknesses

- Can be crowded during peak hours
- Higher price point for specialty items

Products & Pricing

Seasonal Lattes	\$5.50 - \$6.50
Single Origin Pour Over	\$4.50 - \$6.00
Espresso	\$3.50 - \$4.00

Honey Latte Cafe

Portland, OR

A popular spot specifically noted for its event space and suitability for coworking and remote work.

Strengths

- Top-rated for coworking amenities 22
- Community event hosting
- Unique interior atmosphere

Weaknesses

- Limited locations compared to chains
- Niche appeal may alienate traditionalists

Products & Pricing

Honey Latte	\$5.00 - \$6.00
Breakfast Burritos	\$8.00 - \$10.00
Cold Brew	\$4.50 - \$5.50

Good Coffee

Portland, OR

A local chain recognized for high-quality roasting and a perception of better affordability compared to premium boutiques.

Strengths

- Noted for relative affordability 46
- Strong aesthetic appeal
- Multiple convenient locations

Weaknesses

- High traffic can impact noise levels
- Service speed during rush hours

Products & Pricing

Batch Brew	\$3.00 - \$4.00
Cappuccino	\$4.25 - \$5.00
Seasonal Specialty Drinks	\$5.50 - \$6.50

Indirect Competitors

National Chains (Starbucks / Dutch Bros)

Strengths

- Convenience and speed
- Mobile ordering apps
- Consistent product

Weaknesses

- Negative local sentiment in Portland 18
- Lower perceived quality
- Lack of community connection

Home Brewing (High-end equipment / Subscription Beans)

Strengths

- Significantly lower cost per cup 13
- Convenience of not leaving home
- Control over brewing variables

Weaknesses

- Lack of social interaction
- Requires skill and equipment investment
- No workspace variety

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