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Economic Contributions of Oregon's Sports Economy

Technical Memo

Prepared for: Sport Oregon

ECOnorthwest

920 SW 6th Ave • Suite 1400 • Portland, OR 97204 • 503-222-6060





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That assistance notwithstanding, ECONorthwest is responsible for the content of this report. The staff at ECONorthwest prepared this report based on their general knowledge of the economics of recreation, amenities, and regional economies. ECONorthwest staff contributing to this study included Ryan Knapp and Natalie Walker. ECONorthwest also relied on information derived from government agencies, private statistical services, the reports of others, interviews of individuals, or other sources believed to be reliable. ECONorthwest has not independently verified the accuracy of all such information and makes no representation regarding its accuracy or completeness. Any statements nonfactual in nature constitute the authors' current opinions, which may change as more information becomes available.

For more information about this report please contact:

Mike Wilkerson

wilkerson@econw.com
ECONorthwest
503-222-6060





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1. Study Purpose and Context

Why Measure Oregon’s Sports Economy

Across the United States, sports tourism is a growing component of economic development strategies. National studies commissioned by industry associations and research firms show that sports-related travel, including spectator and participant events, generates visitor spending, employment, and tax revenues. The Sports Events & Tourism Association’s (Sports ETA) 2024 State of the Industry: Spectator Sports Tourism report estimates that non-local spectators attending professional, minor league, and collegiate regular-season events generated \$47.1 billion in direct spending nationally in 2024, supporting \$114.4 billion in total economic impact and approximately 665,000 jobs nationwide.¹ These impacts are driven in large part by overnight visitation; an estimated 58 percent of spectator sports travelers stayed overnight, generating more than 42 million room nights nationwide.²

Sports ETA analysis of participatory sports, including youth, amateur, and collegiate tournaments, reach similar conclusions, with a direct economic impact of \$52.2 billion which includes tournament operations and visitor spending that supports a total economic impact of \$128.0 billion nationwide. Sports events function as a traded-sector activity that brings spending into local economies through lodging, transportation, food and beverage, and entertainment. Together, these studies establish that sports tourism contributes meaningfully to the economy at the national level.³

These national studies rely on aggregated data, partial samples of destinations, and generalized modeling assumptions, and as a result do not provide comprehensive state-level estimates. In Oregon’s case, national studies likely include little or no direct data from Oregon-based destinations and instead apply scaling assumptions that may not reflect Oregon’s sports tourism activity.⁴

This limitation matters as states and destinations increasingly use sports tourism data to inform funding and investment decisions. Research on event hosting strategy from the International Academy of Sports Science and Technology (AISTS) finds that rights holders for sports events—prioritize operational readiness, venue quality, and risk management when selecting host destinations. Specifically, “Facilities / Sports Infrastructure” was rated the most important factor when selecting a location, with 71 percent of respondents rating sports infrastructure a 5 out of 5 in importance. Financial guarantees, hosting fees, and the

¹ Sports Events & Tourism Association, *2024 State of the Industry Report: Spectator Sports Tourism*, 2025. <https://www.sportseta.org/blog/2025/04/16/sports-eta-unveils-2024-state-of-the-industry-for-the-114-billion-economic-impact-from-spectator-sports-tourism>

² Ibid.

³ Sports Events & Tourism Association, *2023 State of the Industry Report*, 2024. <https://www.sportseta.org/blog/2024/04/24/sports-eta-releases-its-2023-state-of-the-industry-report-for-the-128-billion-sport-tourism-industry>

⁴ In 2025, ECONorthwest and Sport OR conducted outreach to all of Oregon’s Destination Management Organizations and none reported being surveyed by Sports ETA.



ability to demonstrate economic value to public partners are common features of the host selection process, even when direct financial incentives are not the primary stated factor.⁵ As competition among destinations increases, hosts are expected to document both their capacity to deliver events and the public value of hosting them.⁶

At the same time, states and regions are developing formal mechanisms to support sports event attraction and hosting. Civitas Advisors' review of sports tourism funding tools documents a shift toward dedicated revenue mechanisms, including sports tourism districts, event funds, and bid funds, designed to offset bidding costs, hosting requirements, and facility utilization associated with competitive event procurement.⁷ These tools are most often targeted at mid-sized events that generate overnight visitation and repeat travel rather than one-time mega-events, and they are commonly paired with expectations for measurable economic return. A recent national study shows that this approach has accelerated rapidly, with at least 23 states operating some form of state-level event funding program as of late 2024, and several additional programs under consideration.⁸ The report also highlights that these funds are increasingly structured to support bid guarantees, licensing fees, and hosting costs for amateur, collegiate, and professional events, reflecting growing competition among destinations for events with demonstrable visitor spending impacts. State initiatives such as Washington's Sports Incentivization Grant Program illustrate how quantified economic impact data is being used to justify, size, and prioritize public investment in sports events, reinforcing the importance of consistent, state-specific measurement of sports tourism outcomes.

Despite these national trends, Oregon lacks a comprehensive statewide assessment of its sports tourism economy. No prior study has systematically attempted to identify and quantify the full range of sports events occurring across the state, including professional, collegiate, youth, amateur, and recurring tournament events. Other efforts in Oregon have examined the sports economy from a broader industry and ecosystem perspective rather than a tourism or event-focused lens. The State of Sport report, sponsored by the Portland Metro Chamber and other industry associations, assessed the scale and economic significance of the state's athletic and recreation ecosystem, including sporting goods and apparel manufacturing, professional services, outdoor recreation assets, select professional teams, and select sporting events.⁹ The study's defined sports ecosystem supported \$29 billion in total economic output in 2022 within the state. While this work provides important context on the overall economic footprint of sports-related industries in Oregon, it was not designed to isolate sports tourism activity. As a result, it does not address the specific

⁵ International Academy of Sports Science and Technology (AISTS), *Event Host Venue Strategy: Sports Events Rights Holders*, 2024, <https://aists.org/wp-content/uploads/2025/11/AISTS-Event-Host-Venue-Strategy-Sports-Events-Rights-Holders.pdf>

⁶ *Ibid.*

⁷ Civitas Advisors. *Sports TIDs: A White Paper*. July 2023. https://civitasadvisors.com/wp-content/uploads/2023/07/Sports-TIDs_-White-Paper_compressed.pdf

⁸ Cimmaron Global Solutions. *The Stoll Report on State-Level Funding*. 2024.

⁹ Portland Metro Chamber, *Oregon: The State of Sport: The Economic Impact of the Athletic, Outdoor, Team, and Recreation Industries*, 2022. <https://portlandmetrochamber.com/wp-content/uploads/2023/05/Oregon-TheStateofSport-Report-web-062922.pdf>



information needs associated with evaluating bid fees, hosting support, or sports-related infrastructure investments as tools for economic development.

There is no consistent statewide system for tracking sports events, visitor volumes, or hotel room nights across regions and event types. As a result, Oregon policymakers and destination organizations have limited empirical information for evaluating sports tourism driven economic development tools. This study is intended to support in reducing that gap. By developing Oregon-specific estimates of sports economy activity types and their associated economic contributions, this analysis helps to establish a foundation for understanding how the sports economy contributes to Oregon’s overall economic landscape.

Benefits of Having a Strong Sports Economy

Sports Tourism as an Economic Driver

From an economic development lens, sports tourism is most compelling because it functions like an export industry.¹⁰ It brings out-of-region participants and spectators who spend money locally on hotels, restaurants, transportation, and entertainment. Those dollars circulate through local supply chains, including hospitality, food service, retail, and venue operations, supporting jobs, incomes, and tax revenues. Industry and academic research consistently frames sports-event travel as a meaningful component of the visitor economy.¹¹

Sports-related travel is particularly valuable because it often extends visitor stays and broadens itineraries beyond attendance at the event that is the primary purpose for the trip. Visitors frequently combine games and tournaments with dining, shopping, cultural attractions, and other leisure activities. This bundling effect allows sports tourism to function as a demand driver for downtown districts and mixed-use areas near venues, where spending can spill over to adjacent businesses rather than remaining confined to a single facility.¹²

Facility Infrastructure as a Gathering Place

Sports-related infrastructure supports economic development through two primary channels.

First, facilities provide productive capacity for the visitor economy. Fields, courts, arenas, and aquatic centers serve as the physical capacity needed to host tournaments and events. Without modern facilities, adequate hotel inventory, and reliable transportation connections, communities struggle to compete for events that generate overnight stays and visitor spending. In this sense, sports facilities function similarly to convention centers or trail systems: they are specialized infrastructure that enables a steady stream of visitor demand.

¹⁰ Fourie and María Santana-Gallego, “The Impact of Mega-Sport Events on Tourist Arrivals,” *Tourism Management* 32, no. 6 (2011): 1364–1370, <https://doi.org/10.1016/j.tourman.2011.01.011>

¹¹ Wise, Nicholas, and J. J. Zhang. “The Role of Sports Events in Developing Tourism Destinations: A Systematized Review and Future Research Agenda.” *Journal of Sport & Tourism* (2023). <https://doi.org/10.1080/14775085.2023.2186925>

¹² Sports Destination Management. “Turning Day Trips into Overnight Stays,” Sports Destination Management, 2023, <https://www.sportsdestinations.com>



Second, sports facilities can act as anchors for neighborhood-scale placemaking when paired with complementary development. Economic effects tend to be highly localized, affecting foot traffic, business activity, and redevelopment patterns in the immediate area around a venue. Recent empirical research using granular data, such as mobile-device foot traffic, suggests that spillover effects occur, but their magnitude varies by sport, event timing, and the surrounding mix of land uses and businesses.^{13,14} This distinction is important because a facility can succeed as a district catalyst even if it does not produce measurable gains in overall regional employment or income.

Sports Presence as Community Building

Economic development extends beyond short-term spending effects, with regions competing for residents, workers, firms, and visitors. Sports contribute to this competitiveness by shaping place identity and external awareness. Professional franchises, signature events, and well-known tournament destinations can symbolize local values, generate civic pride, and create shared narratives that strengthen a city or state's brand.

Research in destination branding and sport-event marketing suggests that sporting events influence how both residents and outsiders perceive a place, with potential implications for tourism demand and long-term reputation.^{15,16,17} While these branding effects are difficult to quantify, they are often a central motivation for local investment in sports infrastructure, particularly in regions seeking greater national visibility.

Sports infrastructure can also support economic development through human capital pathways, especially when facilities expand access to participation and programming. A growing body of health research links sport

EXISTENCE VALUE OF THE PORTLAND TRAIL BLAZERS

What is existence value in economics?

- » Existence value reflects the public's willingness to pay to keep a team in their community capturing reputational benefits **not measured in traditional market transactions.**
- » Economists estimate this value using contingent valuation surveys, which ask residents directly about their willingness to pay (WTP) for a public good and apply statistical models to account for individual characteristics.

What is the existence value of the Trail Blazers?

- » Across the Metro Portland Region, surveys and applied methodologies estimate **\$13.7 million in annual public benefit**, and permanent valuation of \$456 million.

Source: ECONorthwest analysis for the Portland Trail Blazers, 2018.

¹³ Noah Agha, "The Economic Impact of Stadiums and Teams: The Case of Minor League Baseball," *Journal of Sports Economics* 14, no. 3 (2013): 227–252, <https://doi.org/10.1177/1527002512451622>

¹⁴ Brad R. Humphreys and Li Zhou, "Sports Facilities, Agglomeration, and Public Subsidies," *Regional Science and Urban Economics* 54 (2015): 60–73, <https://doi.org/10.1016/j.regsciurbeco.2015.07.004>

¹⁵ Laurence Chalip, "Beyond Impact: A General Model for Sport Event Leverage," *Rethinking Sport Tourism*, ed. Brent Ritchie and Daryl Adair (London: Routledge, 2004), 226–252.

¹⁶ Kyriaki Kaplanidou and Christine Vogt, "The Meaning and Measurement of a Sport Event Experience Among Active Sport Tourists," *Journal of Sport Management* 21, no. 3 (2007): 357–378.

¹⁷ Michael B. Duignan et al., "How Do Event Zones Influence Visitor Behaviour and Engagement with Host Destinations? A Longitudinal Study of the Cambridge Half Marathon (2017–2020)," *Journal of Destination Marketing and Management* 30 (December 2023): 100798, <https://doi.org/10.1016/j.jdmm.2023.100798>



participation to improved physical health, mental health, and social outcomes across age groups.¹⁸ Systematic reviews of youth sports participation find benefits related to physical activity, social skills, and psychological well-being, while related research suggests team sports and social belonging can reduce the risk of depression among adolescents.^{19,20}

From an economic development perspective, these outcomes matter because healthier communities tend to be more productive over time, experience fewer missed workdays, and demonstrate stronger educational and social outcomes. Although these benefits are diffuse and long-term, they can strengthen the overall rationale for multi-use sports investments when equity, access, and community programming are explicit goals.

¹⁸ Rochelle M. Eime et al., “A Systematic Review of the Psychological and Social Benefits of Participation in Sport for Adults,” *International Journal of Behavioral Nutrition and Physical Activity* 10, no. 1 (2013): 135, <https://doi.org/10.1186/1479-5868-10-135>

¹⁹ Dennis Bengtsson, Joar Svensson, Virginia Wiman, Andreas Stenling, Erik Lundkvist, and Andreas Ivarsson, “Health-Related Outcomes of Youth Sport Participation: A Systematic Review and Meta-Analysis,” *International Journal of Behavioral Nutrition and Physical Activity* 22 (July 1, 2025): 89, <https://doi.org/10.1186/s12966-025-01792-x>

²⁰ Matt D. Hoffmann, Joel D. Barnes, Mark S. Tremblay, and Michelle D. Guerrero, “Associations between Organized Sport Participation and Mental Health Difficulties: Data from over 11,000 US Children and Adolescents,” *PLoS ONE* 17, no. 6 (June 1, 2022): e0268583, <https://doi.org/10.1371/journal.pone.0268583>



2. Defining the Sports Economy

The term *sports economy* can encompass a wide range of industries and activities. In prior Oregon-focused research, the sports economy has included athletic and outdoor apparel and footwear manufacturing, sporting goods design and development, outdoor recreation industries, and related professional services.²¹ Those sectors are critically important to Oregon's broader economic identity, but they are not the focus of this analysis.

For the purposes of this study, the sports economy is defined as the operations and visitation associated with sporting events and organized athletic activity in Oregon. This includes the activities of teams, athletic departments, leagues, facilities, and event organizers, as well as spending generated by visitors who travel to participate in or attend sporting events. These operational activities represent a core component of Oregon's broader sports tourism ecosystem, as they provide the facilities, staffing, and organizational infrastructure necessary to host events and attract visitors to the state.

Structure of the Sports Economy

Participatory and Spectator Sports

Participatory sports involve individuals or teams competing directly in events (e.g. youth leagues and tournaments, adult amateur tournaments, and marathons). These activities draw a higher share of local participants and rely on community recreation facilities and infrastructure. Participatory sports primarily generate revenue through participant and team fees, rather than charging for tickets. Although participatory sports draw a larger share of local residents, they do attract teams from out of region, and this is an important opportunity to grow the regional economy.

Spectator sports, by contrast, center on audiences attending organized competitions that are generally ticketed. This category includes professional franchises, semi-professional teams, Division I collegiate athletics, and major ticketed sporting events. Spectator sports are more likely to attract concentrated out-of-region attendance. Because spectator events often involve larger venues, media coverage, and formal ticketing systems that generate revenue, it is easier to track and quantify the economic benefits that the revenue supports.

Both categories can generate meaningful local and non-local visitor spending, including travel associated with large amateur tournaments. However, the primary distinction between them is the revenue model: spectator sports generally rely on ticket sales and audience

²¹ Portland Metro Chamber, *Oregon: The State of Sport: The Economic Impact of the Athletic, Outdoor, Team, and Recreation Industries*, 2022. <https://portlandmetrochamber.com/wp-content/uploads/2023/05/Oregon-TheStateofSport-Report-web-062922.pdf>



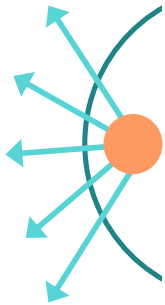
attendance as a key revenue driver, while participatory sports primarily generate revenue through participant registration or entry fees.

Locally Serving and Traded Sector Dynamics

Across both participatory and spectator categories, sports activity can function either as a locally serving activity or as a traded-sector (export) activity. This distinction applies not only to visitor spending, but also to facility and team operations.



The **local sector** consists of industries and activities that primarily serve in-region demand. Revenue is generated largely from resident households and local firms, meaning spending reflects the internal circulation of existing income within the regional economy. While local-sector activity supports employment and business operations, it does not systematically increase total regional economic output because expenditures are constrained by the existing local resource base.



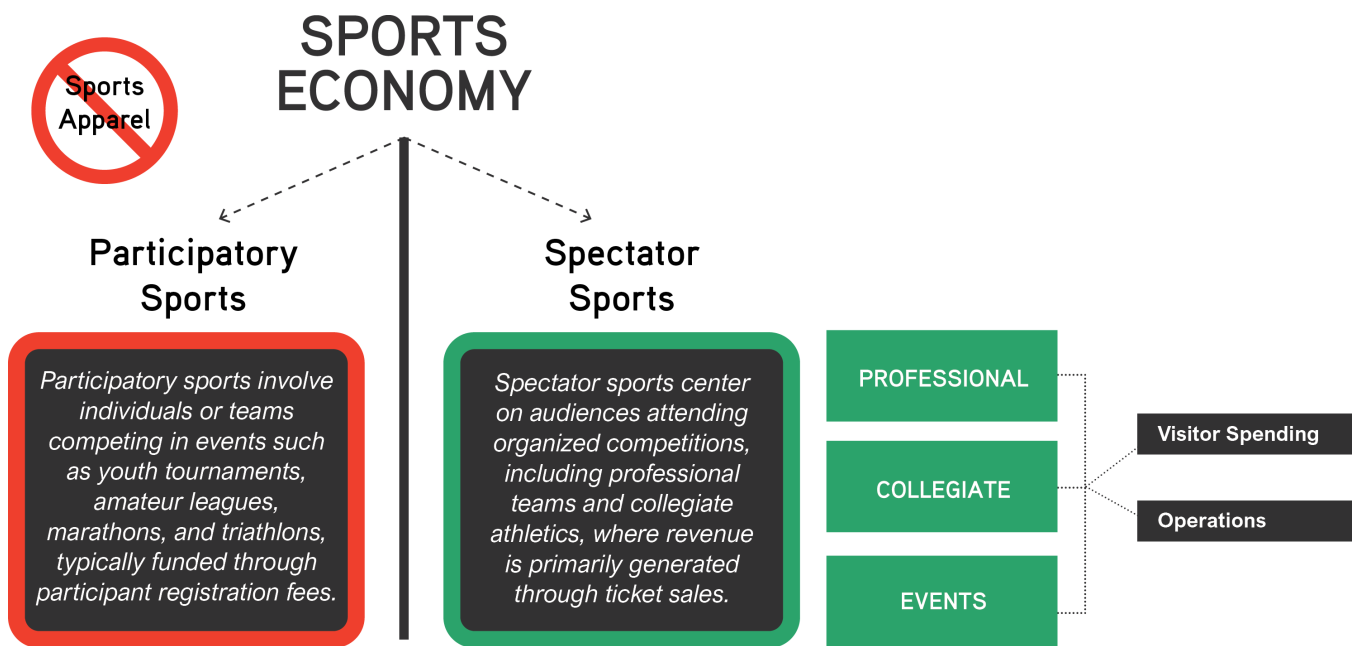
The **traded sector** consists of industries and activities that sell goods or services to customers outside the region. Revenue originates externally and represents an inflow of new income. Because traded-sector activity brings outside dollars into the regional economy, it represents net-new economic impact which excludes expenditures that substitute for other local spending and focuses only on incremental income entering the region. Net-new impact therefore represents growth in the regional economy due to a certain business or activity and aligns most directly with traded-sector activity and export-based development frameworks.

Economic contributions (gross effects) measure the total economic activity supported by an industry, organization, or event. These estimates include spending from both local and non-local sources. Contribution analysis reflects the scale of activity within the economy but does not distinguish whether the underlying revenue expands overall economic activity in the region.



Study Focus

Exhibit 1. Study Analysis Framework



This analysis measures:

- ◆ Non-local visitor spending associated with spectator sports, including professional, semi-professional, Division I collegiate, and select major spectator events.
- ◆ Operational expenditures of major professional teams and Division I athletic departments.

When quantifying visitor impacts, only spending by non-local attendees is included. Local resident spending is excluded because it largely represents substitution within the regional economy and does not constitute net-new economic activity. While local attendees clearly contribute to business revenues on event days, tourism economics literature generally excludes local spending to avoid overstating economic impact and to maintain comparability with national benchmarks.

On the operations side, both local and non-local revenue sources are included due to data availability constraints. As a result, operational impacts should be interpreted as gross economic contributions, not net-new impacts.

The economic contributions presented in this report are conservative relative to the full scale of Oregon’s sports economy. Specifically, this analysis does not include:

- ◆ Non-local spending associated with participatory-focused sports (youth and adult amateur leagues and events).
- ◆ Ongoing operations for sports facilities primarily focused on participatory sports (e.g., Rogue X), due to uncertainty in attributing activity specifically to spectator events.



- ◆ Event or tournament operating footprint for spectator and participatory sports due to lack of available data from organizers.
- ◆ The full universe of spectator events statewide. Due to limitations in event tracking and reporting, only a subset of professional, collegiate, and major spectator events are included. Engagement with DMOs suggests that most large spectator-driven events are captured, but smaller or less-documented events are not.

As a result, the total gross economic contributions of Oregon’s sports economy are likely larger than the figures presented in this study. The study analysis reflects the portion of the sports economy that can be consistently measured within the resource constraints of this project.

PARTICIPATORY SPORT CASE STUDY: Ironman Salem — Salem, OR

- **Travel Salem, in partnership with Sport Oregon, the Willamette Valley Visitors Association, City of Salem & Travel Oregon, hosted the 4th annual IRONMAN 70.3 Oregon Triathlon on July 21, 2024, in Salem. The triathlon course leverages the natural landscape of Salem. Athletes begin with a 1.2-mile downriver swim in the Willamette River, followed by a 56-mile ride through Oregon’s beautiful wine country, and cap off their race with a 13.1-mile run featuring Minto-Brown Island Park. The event also serves as a qualifying race for the IRONMAN 70.3 World Championship series.**
- **In 2023, Travel Salem signed a 5-year contract with Ironman 70.3 that would bring thousands of worldwide competitors and visitors each summer until 2028. The estimated economic impact of the event in 2024 was roughly \$15.5 million, drawing in over 2,500 athletes & 7,500 spectators. The cost broken down by sector indicates the top three spending categories included food service (~\$4.7 million dollars), lodging (~\$3.4 million), and retail (~\$2.2 million). Overall, economic impact in 2024 increased by 15 percent compared to the 2023 economic impact.**

Sources:

1. Travel Salem, *Ironman 70.3 Oregon 2024 Salem Economic Impact Report (2024)*, <https://travel-salem.s3.amazonaws.com/images/files/2024-IRONMAN-EEI-Report.pdf?v=1728489836>.
2. Madeleine Moore, "Salem's Ironman 70.3 Draws 2,500 Athletes, Closing Streets Sunday," *Salem Reporter*, July 17, 2024, <https://www.salemreporter.com/2024/07/17/salems-ironman-70-3-draws-2500-athletes-closing-streets-sunday/>.



3. Economic Contributions of the Sports Economy in Oregon

This analysis estimates the economic contributions associated with visitor spending by sports-related travel in Oregon as well as sports teams, collegiate athletic departments, and individual event operations. The approach follows standard economic impact analysis practice and is designed to measure how spending by non-local visitors attending sporting events, and how operating entities that support spectator sports circulate through the state and regional economies.

Economic contributions are estimated using the IMPLAN input-output (I/O) modeling system, a widely used framework for assessing how spending in one part of the economy supports activity in other sectors (see Economic Contribution Modeling in the Appendix). IMPLAN represents the economy as a set of interlinked industries, households, and governments, and tracks how dollars flow between them through supply-chain purchases and household spending. In this analysis, direct spending within the relevant industries is entered into the IMPLAN model to estimate indirect effects (business-to-business supply-chain activity) and induced effects (household spending supported by wages earned from direct and indirect activity). Together, these effects represent the total economic contributions associated with sports tourism economy.



JOBS
Direct: 4,800
Total: 8,700



ECONOMIC OUTPUT
Direct: \$997M
Total: \$1.72B



LODGING TAX CONTRIBUTION
\$4.9M



Oregon's Sports Economy in Context

Oregon's commercial sports industry represents a relatively strong component of the state's economy compared to the national average. This analysis defines the commercial sports industry using industries Sports Teams and Clubs (NAICS 711211) and Other Spectator Sports (NAICS 711219), which include the operations of professional and semi-professional teams, independent athletes, racing teams, and other organizations directly involved in competitive sporting events. The definition excludes related components of the broader sports economy—such as stadium and arena operations, collegiate athletic departments, and other supporting industries—due to availability and alignment of data provided by IMPLAN and the U.S. Bureau of Economic Analysis.

Using this definition of commercial sports, Oregon can be compared to the US and each state in terms of the level of economic output produced by commercial sports. An economic output location quotient (LQ) measures how concentrated an industry's economic activity is in a region compared with the national economy. Specifically, an output LQ compares the share of a region's total economic output produced by a given industry to that industry's share of total output, and then compares to that same split in the US. The national average is set to 1.00.

Oregon's commercial sports industry has an LQ of 1.23

indicating that commercial sports account for 23 percent more of the state's economic output than the national average (see Exhibit 2). Oregon ranks 10th in the US, preceded by Minnesota and New York. This suggests that Oregon already maintains a meaningful base of commercial sports activity relative to its overall economy. At the same time, comparisons with states such as Massachusetts (LQ 1.47) highlight potential room for growth. Despite having a highly productive economy and slower population growth—conditions similar to

SPECTATOR SPORTS OPERATIONS COMPARISON TO OTHER OREGON INDUSTRIES

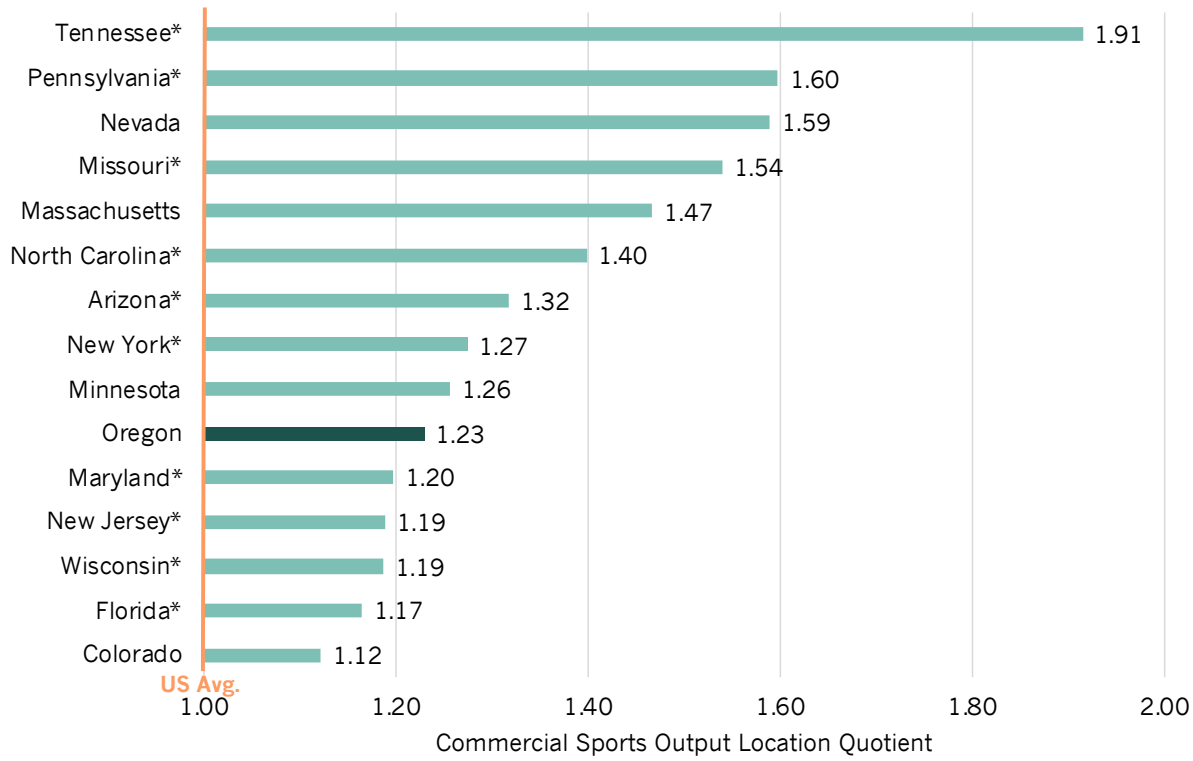
Professional and university athletics operations represent a clearly defined production activity—the creation of the sports product—that can be compared to other industries operating in Oregon. By contrast, sports tourism spending reflects part of the consumption of that product and is distributed across multiple industries (lodging, food service, retail, transportation, etc.). In 2024, the economic output associated with professional and collegiate sports operations was \$774.1 million.

- » **Hotel and Motels (\$3.2 billion)**
- » **Air Transportation (\$3.1 billion)**
- » **Wineries (\$1.5 billion)**
- » **Cheese manufacturing (\$1.2 billion)**
- » **Breweries (\$871 million)**
- » *Estimated Professional and Collegiate Sports Operations (\$774 million)*
- » **Rail Transportation (\$740 million)**
- » **Performing Arts (\$635 million)**
- » **Pharmaceutical and Medicine Manufacturing (\$488 million)**



Oregon—Massachusetts sustains a significantly higher concentration of commercial sports activity.

Exhibit 2. Top 15 States with Highest Commercial Sports Economic Output Concentration, 2024



Note: “*” indicates a state with state-level sports bid fund.
 Data source: IMPLAN, 2024

Ten of the 15 states with the highest commercial sports output LQ have state-level funding for bidding on major sports events.²² Exhibit 3 compares the concentration of commercial sports economic output across select states and the average for states with and without bid funds. Washington and California has a commercial sports output LQ that is slightly below the national average. Washington recently established a modest state-level sport bid fund. In 2024, the Washington State Legislature approved \$1 million for the Sports Incentivization Grant (SIG) program to help sports commissions attract new sporting events that bring visitors from outside the region. In contrast, California currently does not operate a statewide sports event bidding or hosting fund.

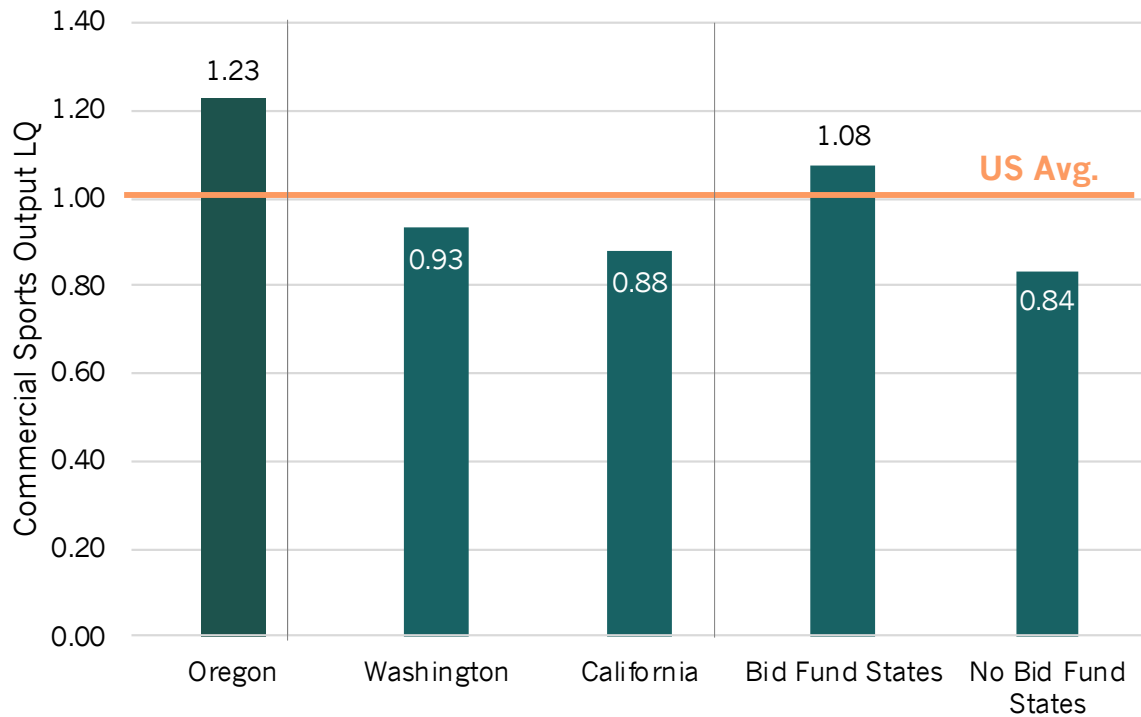
On average, states with bid funds show a commercial sports output LQ of 1.08, slightly above the national average, while states without bid funds average 0.84. This suggests that states with event funding programs tend to have somewhat stronger commercial sports sector. However, the direction of this relationship is difficult to disentangle. In some cases, states may establish event funds because they already have strong sports and tourism ecosystems, while in other states event funds may be created to help build or expand those sectors. Recent examples illustrate this ambiguity. Several states that have only recently implemented

²² Cimmaron Global Solutions. *The Stoll Report on State-Level Funding*. 2024.



sports dedicated funding—such as Delaware and Washington in 2024—currently exhibit relatively modest commercial sports LQs compared with leading states like Tennessee and Pennsylvania. However, Tennessee’s Special Event Fund was used, for the first time ever, for a sporting event (Music City Grand Prix) in 2024, and Pennsylvania’s Sports Marketing and Tourism Program was only established in 2022. Additionally, Massachusetts, for example, ranks among the top states for commercial sports output concentration despite not operating a dedicated state bid fund.

Exhibit 3. Commercial Sports Economic Output Concentration, Select States, 2024



Data source: IMPLAN, 2024; Cimmaron Global Solutions, 2024.



Economic Contributions of Spectator Sports Tourism Spending

This analysis focuses on the economic contributions of out-of-region visitors attending spectator sports events. Sports and events were identified through survey responses from Regional Destination Management Organizations (RDMOs) and Destination Management Organizations (DMOs), supplemented by discussions with the Sport OR team to identify events most likely to attract non-local visitation (see Destination Management Organization Survey in the Appendix for details).²³ Professional and semiprofessional teams were selected across the state. Collegiate sports are limited to Division I universities and regular-season home games. Annual and one-off spectator events are not intended to be comprehensive, but instead reflect events reported by DMOs as having the highest visitation and confirmed through follow-up with Sport OR. DMOs and RDMOs provided information on 112 events and categorized these events into youth, adult, collegiate, or professional. The analysis is narrowed to the 55 events that were reported by DMOs as adult, collegiate, or professional. Through discussion with Sport OR, 18 events were selected based on their likelihood of including a spectator or ticketed component and generating non-local travel, consistent with a traded-sector approach to economic impact analysis. Exhibit 4 shows the selected events and their estimated spectator attendance.

SPECTACTOR SPORT CASE STUDY: Seaside Beach Volleyball Tournament — Seaside, OR

- **The Seaside Beach Volleyball Tournament is the largest volleyball tournament in the United States and the second largest in the world. Founded in 1982 by a local high school student inspired by beach volleyball abroad, the tournament has grown from 52 teams in its first year to more than 1,600 teams today. Demand continues to rise: in 2025, one-third of divisions sold out within 24 hours, leaving more than 600 teams on a waitlist. Organizers are planning continued expansion, including the addition of a fifth day in 2026, to accommodate growth and reduce waitlists.**
- **What began as a small fundraiser now draws an estimated 40,000 visitors to Seaside and generates significant economic activity in a tourism-dependent community. The tournament produces an estimated \$6.9 million in economic impact on its peak Saturday alone, filling roughly 1,300 hotel rooms and supporting local businesses. Benefits extend beyond Seaside, with visitors lodging in nearby communities such as Astoria, Tillamook, and Portland. Alongside other major summer events like the Hood to Coast Relay, the tournament plays a critical role in driving seasonal revenue and sustaining the regional tourism economy.**

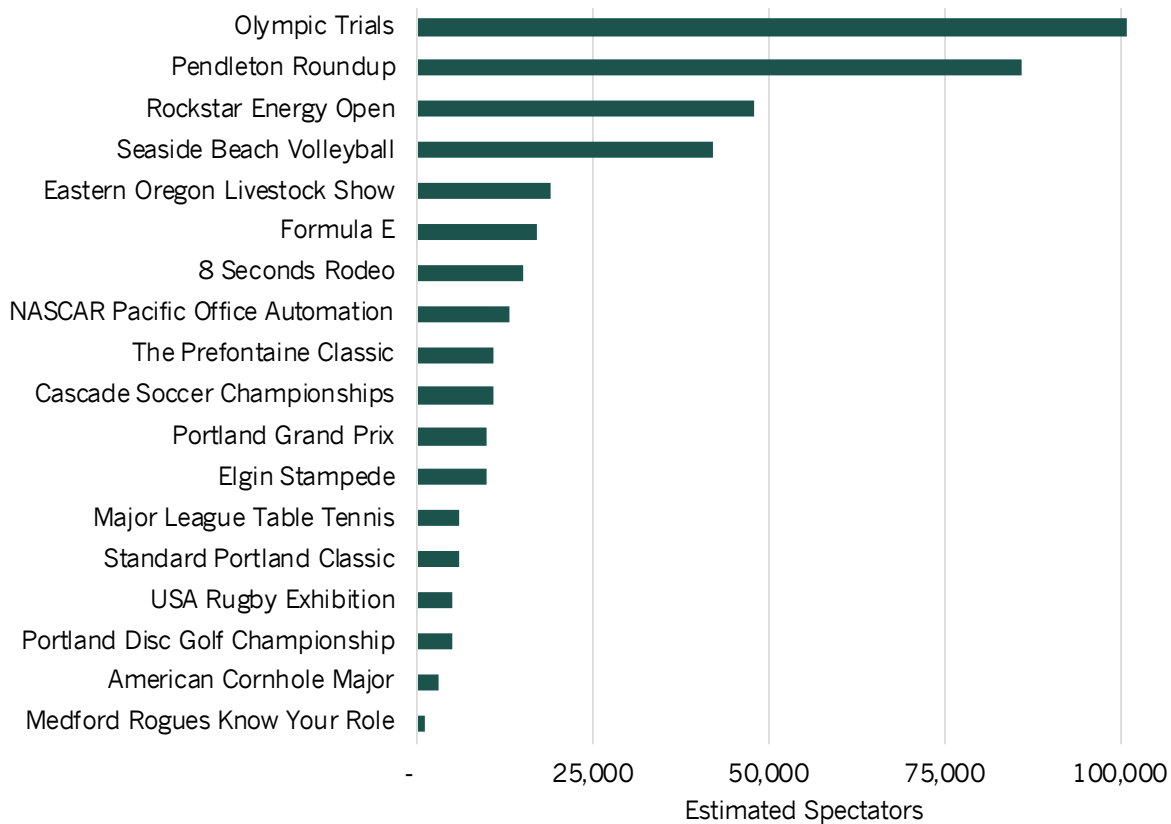
Sources:

1. Linda Hoard, "Seaside Volleyball Tournament Returns to the Courts for a 40th Year | Discover Our Coast," accessed December 29, 2025, <https://discoverourcoast.com/2022/08/10/seaside-volleyball-tournament-returns-to-the-courts-for-a-40th-year/>.
2. Sport Oregon, "Largest Beach Volleyball Tournament in the U.S. Celebrates 43 Years in Seaside," Sport Oregon, August 4, 2025, <https://www.sportoregon.org/voices/seaside-beach-volleyball-2025>.
3. Sport Oregon, "Small Oregon Towns Make Big Impact with Upcoming Events — Sport Oregon Voices," Sport Oregon, August 10, 2025, <https://www.sportoregon.org/voices/small-oregon-towns-make-big-impact-with-upcoming-events-sport-oregon-voices>.
4. ARC PDX, "Seaside Beach Volleyball Tournament Kicks off with Record Growth," August 12, 2025, <https://katu.com/news/arc-pdx/seaside-beach-volleyball-tournament-kicks-off-with-record-growth>.

²³ For more information on all of Oregon's DMOs visit: <https://industry.traveloregon.com/about/tourism-in-oregon/destination-management-organizations/>



Exhibit 4. Estimated Spectators at Selected Spectator Sports Events, Oregon, 2024



Data source: Placer.ai, 2024; ECONorthwest analysis, supplemented with publicly reported estimates of visitation.

Visitation Estimates

Visitation estimates for professional and semi-professional sports are primarily derived from Placer.ai mobility data, supplemented where available with ticketing and attendance information to validate event-level volumes as well as the home location of visitors. Annual and one-off spectator sporting events are similarly estimated using Placer.ai data, with additional ticketing information incorporated for select events to refine attendance counts. For collegiate sports, visitation figures are drawn directly from attendance reported on Division I university athletics websites for regular-season home games.

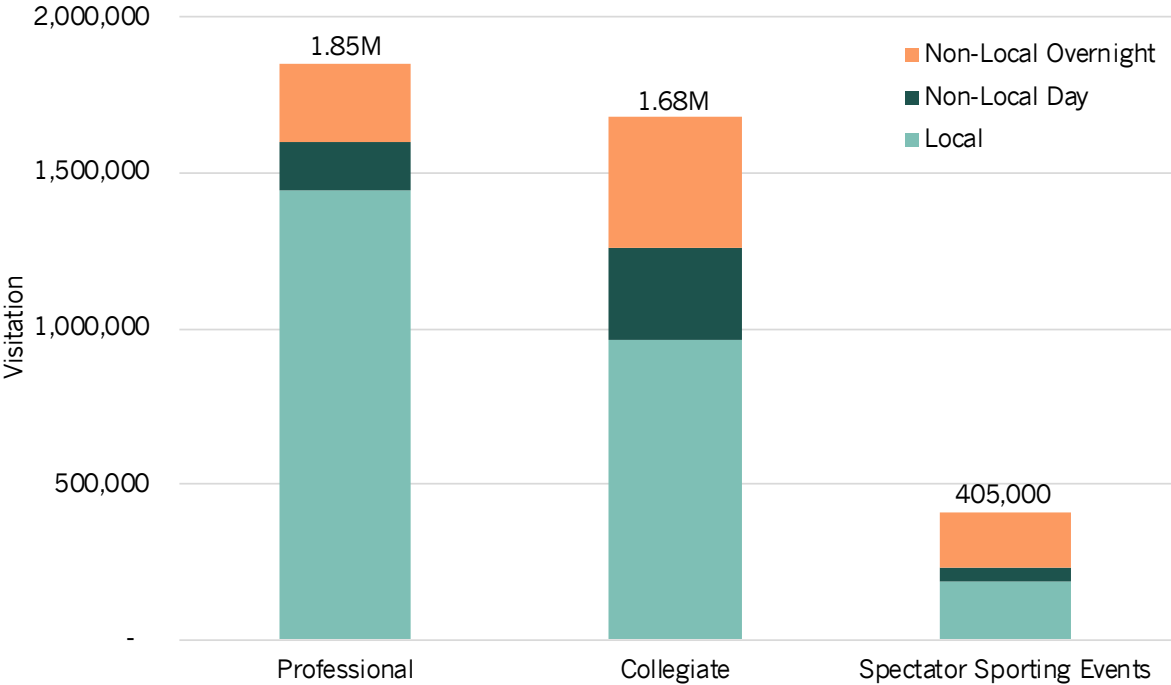
Across all event types, visitors are classified based on travel distance using Oregon’s legislative definition of locality.²⁴ A local visitor is defined as residing within a 50-mile driving radius of the event location, a non-local day visitor travels between 50 and 100 miles, and a non-local overnight visitor travels more than 100 miles, indicating a high likelihood of an overnight stay. These distances are calculated based on the geographic location of each event or game, and an estimated visitor home location provided through the Placer.ai platform.

²⁴ Oregon Legislative Assembly, *Oregon Revised Statutes § 320 (Business Registry; Definitions and Rules)*, accessed January, 2026, https://www.oregonlegislature.gov/bills_laws/ors/ors320.html



Professional and semi-pro sports show the largest total attendance (1.85 million visits), but the majority of that visitation is local (78 percent), with a smaller share of non-local overnight travel (14 percent). Collegiate sports exhibit a higher proportion of non-local visitation, with 25 percent of visits classified as non-local overnight. The selected annual and one-off spectator sporting events have the highest share of non-local overnight visitation, with 43 percent of total visits originating from beyond a 100-mile radius. While these events account for a smaller share of total attendance, they contribute disproportionately to overnight travel and therefore play an important role in sports-related tourism spending. Multnomah, Lane, and Benton county account for the highest portion of visitation across the state driven by the professional and collegiate sports present there. However, the share of non-local visitation is highest in counties with major annual sporting events, Clatsop and Umatilla county, followed by Lane and Benton county whose collegiate games and tournaments bring in non-local visitation.

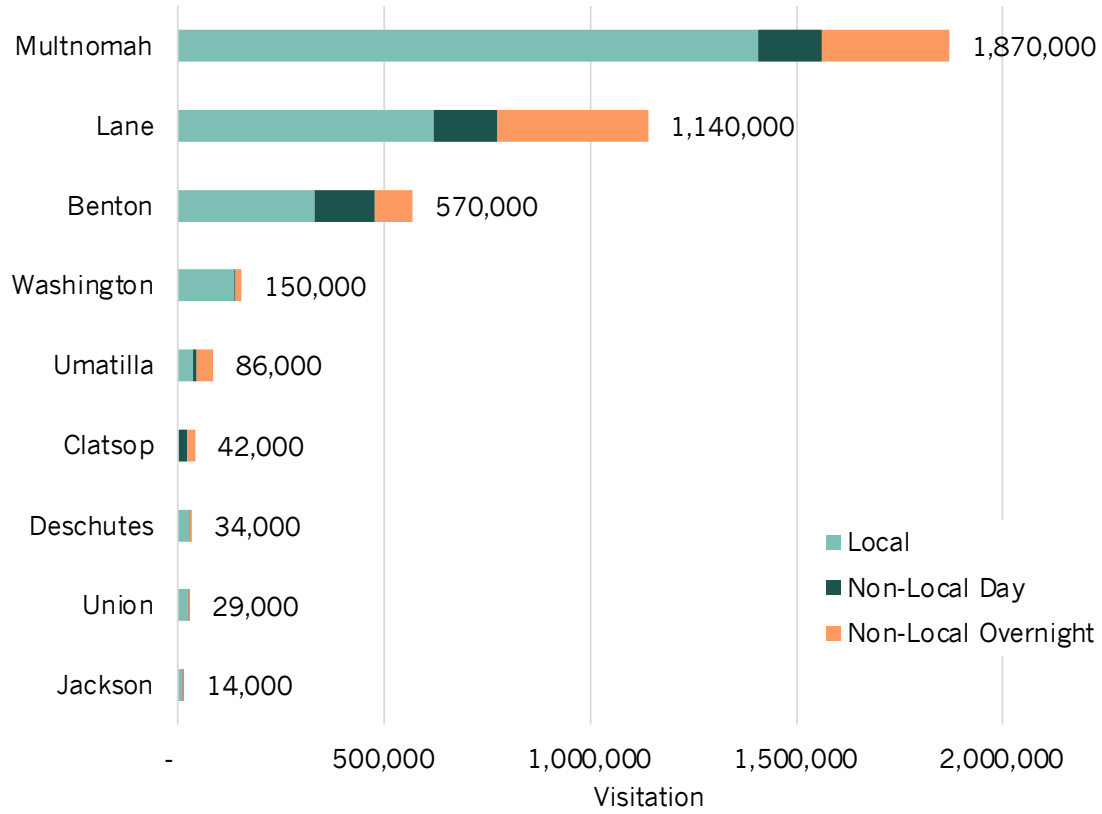
Exhibit 5. Spectator Sports Visitation by Event Type, Oregon, 2024



Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; ECONorthwest analysis



Exhibit 6. Spectator Sports Visitation by County, Oregon, 2024



Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; ECONorthwest analysis



FUTURE SPECTATOR SPORT CASE STUDY:

2026 USA Fencing Summer Nationals — Portland, OR

- **Portland is scheduled to host the 2026 USA Fencing Summer Nationals from June 27 to July 6 at the Oregon Convention Center, marking the city’s first time hosting a USA Fencing signature summer event since 1977. The event builds on Portland’s strong fencing legacy, which includes producing two Olympic champions and hosting the USA Fencing Youth National Tournament in March 2024, an event that attracted nearly 2,300 young fencers.**
- **While comprehensive economic impact data for hosting the USA Fencing Summer Nationals are not available for Portland, economic impact reports from prior host cities provide a useful benchmark. In 2025, Milwaukee hosted USA Fencing Summer Nationals, welcoming over 6,000 competing athletes and roughly 11,000 attendees. The estimated generated economic impact for the event was \$10.7 million dollars. If Portland experiences similar attendance and spending patterns, the 2026 Summer Nationals could generate meaningful short-term economic benefits for local hotels, restaurants, and visitor-serving businesses. USA Fencing has indicated that host selection is driven primarily by the size and capacity of indoor facilities. Although the organization revised its site-selection policies in 2025, Portland appears to have been chosen as the 2026 host prior to those changes.**

Sources:

1. Bryan Wendell, “2026 USA Fencing Summer Nationals Coming to Portland, Ore.,” June 13, 2025, <https://www.usafencing.org/news/2025/june/13/2026-usa-fencing-smer-nationals-coming-to-portland-ore->
2. Athletic Business, “USA Fencing to Give Preference to States With More Inclusive Laws When Selecting Future Host Cities for National Tournaments,” Athletic Business, November 15, 2022, <https://www.athleticbusiness.com/industry-press-room/press-release/15303196/usa-fencing-to-give-preference-to-states-with-more-inclusive-laws-when-selecting-future-host-cities-for-national-tournaments>.
3. Jackson Thompson, “USA Fencing Declines to Explain Reason for Policy Changes on National Anthem, Prioritizing pro-LGBTQ States,” accessed December 29, 2025, <https://www.foxnews.com/sports/usa-fencing-declines-explain-reason-policy-changes-national-anthem-prioritizing-pro-lgbtq-states.print>.

Consistent with best practices in economic impact analysis, this study focuses exclusively on non-local visitation. Spending by local residents is excluded because it generally represents a reallocation of existing household spending rather than new economic activity to a region.

Visitor spending estimates are based on per-person, per-day spending profiles developed by Travel Oregon and Destination Analysts survey in 2022.²⁵ These profiles are derived from statewide visitor survey research and report average daily spending by accommodation type and region. The accommodation type is the primary driver the daily visitor spending differences. Accommodation type shares vary by region and event category and are informed by Travel Oregon’s survey results. These shares are applied to estimated visitation counts to determine total direct visitor spending by accommodation type.

For this analysis, Travel Oregon’s regional spending estimates are used to assign spending levels to non-local visitors based on how they are most likely to stay while traveling for sporting events. Spending estimates were adjusted to current dollars using the consumer price index. The per-person, per-day spending range by visitor and accommodation type as

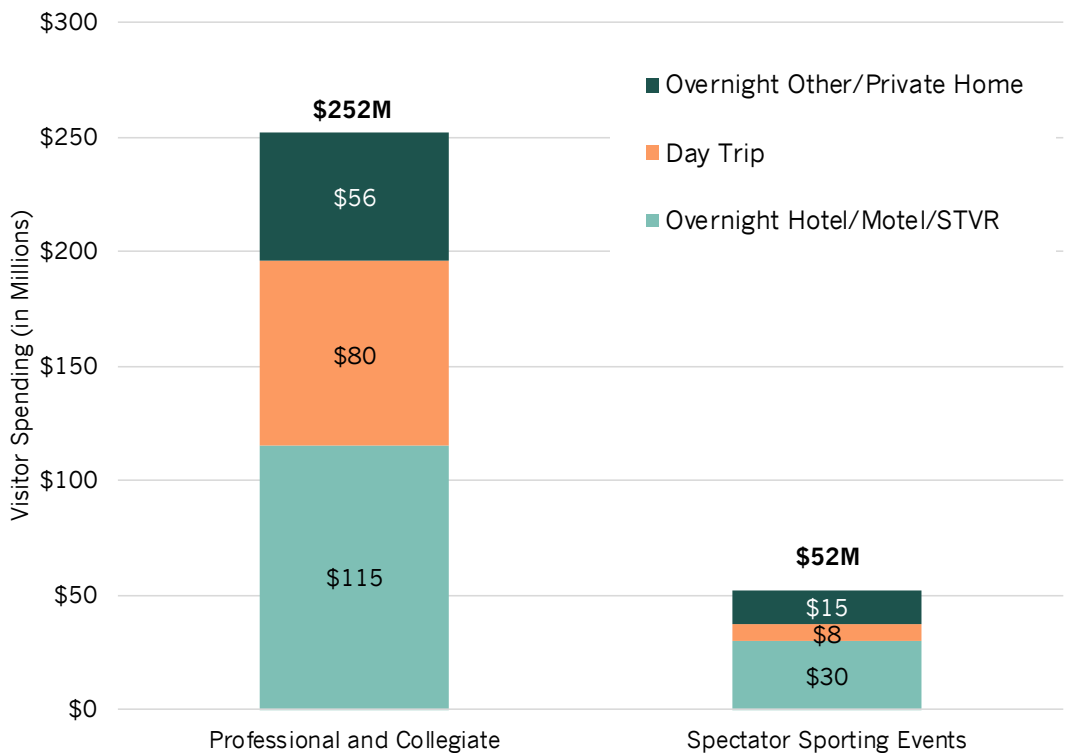
²⁵ Travel Oregon, *2022 Oregon Visitor Profile*, Destination Analyst, June 2023, <https://industry.traveloregon.com/research/2022-oregon-visitor-profile/>.



well as region. The average daily per-person spend for a day trip visitor range between \$175 and \$200, while the average overnight visitor staying in a hotel or short-term rental spends up to \$300, depending on the region.

Direct visitor spending is calculated by multiplying the number of non-local visitors in each category (day trip, hotel overnight, other overnight, and private home overnight) by the applicable per-person, per-day spending estimate. In 2024, an estimated \$304.3 million was spent by visitors to spectator sporting events. This total direct visitor spending reflects expenditures on lodging, food and beverage, transportation, retail, entertainment, and other visitor services incurred during a sports-related trip.

Exhibit 7. Non-local Visitor Spending by Event and Accommodation Type, Oregon, 2024



Data source: Placer.ai, 2024; Travel Oregon, Visitor Profiles, 2022; ECONorthwest analysis

These direct spending estimates serve as the inputs to the IMPLAN model and represent the initial economic activity supported by sports-related travel. The model then estimates how this spending supports jobs, labor income, value added or GDP, and economic output across Oregon’s economy through indirect and induced effects.

As with all economic contribution analyses, results should be interpreted as estimates rather than precise measures. Visitor spending profiles reflect regional averages and may understate spending for visitors staying in premium accommodations or attending high-profile events. In addition, while Travel Oregon’s survey-based estimates provide a consistent and defensible basis for spending assumptions, individual visitor behavior may vary by event type, season, and location. These factors suggest that results are best interpreted as



conservative estimates of the economic contributions associated with sports-related visitor spending.

As shown in Exhibit 8, non-local visitors to professional, semi-pro, collegiate, and select spectator sports events supported an estimated 1,920 jobs in Oregon through visitor spending in industries such as accommodations and food services, retail, and arts, entertainment, and recreation. An additional 920 secondary (indirect and induced) jobs are supported by supply-chain and consumption effects. Across the state, sports tourism spending supported an estimated 2,840 jobs and roughly \$145 million in labor income.

Sports tourism spending directly contributed \$123 million to Oregon’s gross domestic product (GDP) and a total of approximately \$231 million when accounting for secondary contributions. The economic output, which is the broadest measure of economic activity, associated with sports tourism spending totaled \$409 million in 2024. This indicates that every dollar spent by a visitor supports an additional \$0.84 of economic activity through supply chain or consumption effects.

Exhibit 8. Economic Contributions of Spectator Sports Tourism, Oregon, 2024

| CONTRIBUTION TYPE | JOBS | LABOR INCOME | VALUE ADDED | ECONOMIC OUTPUT |
|-------------------|--------------|----------------------|----------------------|----------------------|
| Direct | 1,920 | \$80,100,000 | \$123,300,000 | \$222,500,000 |
| Indirect | 450 | \$34,100,000 | \$52,900,000 | \$97,800,000 |
| Induced | 470 | \$30,600,000 | \$55,100,000 | \$88,600,000 |
| Total | 2,840 | \$144,800,000 | \$231,400,000 | \$408,900,000 |

Note: All monetary values are presented in 2025 dollars. Figures may not sum due to rounding.
 Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Economic Contributions of Spectator Sports Operations

This analysis estimates the economic contributions associated with primary sports operations in Oregon, including professional sports franchises and Division I university athletics departments.

The analysis does not capture the economic contributions associated with one-off or annual event hosting, nor does it fully account for ongoing facility operations due to data availability. As a result, these estimates should be viewed as conservative. Nonetheless, sports operations are included as part of the sports tourism ecosystem because these teams, departments, and facilities must exist and operate year-round for Oregon to host spectator events and attract out-of-region visitors.

For several large professional and collegiate programs, the analysis draws on existing economic contribution studies that estimate employment and spending associated with team or athletics department operations. Specifically, previously published economic impact



analyses were used for the Portland Trail Blazers, Portland Timbers, Portland Pickles, and the University of Oregon and Oregon State University athletics departments. These studies provide estimates of economic contributions summarized in this analysis.^{26,27} For the Hillsboro Hops, operational employment and spending information was obtained through an interview with a team representation and follow-up survey. These data were then modeled using IMPLAN at the statewide level to estimate total economic contributions.

For Portland State University and the University of Portland, the analysis relies on Equity in Athletics Disclosure Act (EADA) data reported for fiscal year 2023 (the most recently available data year).²⁸ EADA provides standardized information on athletics department employment and operating expenses for NCAA institutions. These expenditures were treated as direct spending and modeled through IMPLAN at the statewide level.

Professional sports operations and Division I university athletics supports ongoing economic activity within the state, as shown in Exhibit 9. Professional sports operations support an estimated 1,770 direct jobs, with total employment impacts of approximately 3,400 jobs statewide. These operations generate an estimated \$387 million in direct economic output and \$669 million in total output once indirect and induced effects are considered. University athletics departments contribute an additional 1,130 direct jobs, supporting a total of approximately 2,400 jobs statewide. Direct economic output associated with university athletics operations is estimated at \$387 million, with \$647 million in total output.

In total, sports operations in Oregon support approximately 2,900 direct jobs and 5,840 total jobs statewide, generating \$774 million in direct economic output and \$1.3 billion in total economic output. These figures reflect the scale of ongoing sports-related activity that underpins Oregon's ability to host sporting events and compete in the broader sports tourism market.

²⁶ University of Oregon, *Economic Impact of University of Oregon*, November 2025, <https://news.uoregon.edu/sites/default/files/2025-11/uo-economic-impact-report.pdf>

²⁷ Oregon State University, *Economic Impact Report: Oregon State University*, July 2025, <https://leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/2025-07/Economic%20Impact%20Report%20OSU.pdf>

²⁸ U.S. Department of Education, *Equity in Athletics Disclosure Act (EADA) Data Analysis*, July 2023 through June 2024, <https://ope.ed.gov/athletics/#/institution/details>



Exhibit 9. Select Sports Teams and University Athletics Operations, Oregon, 2024

| SPORT TYPE | CONTRIBUTION TYPE | JOBS | ECONOMIC OUTPUT |
|-------------------------|-------------------|--------------|------------------------|
| Professional | Direct | 1,770 | \$387,300,000 |
| | Indirect | 660 | \$93,150,000 |
| | Induced | 975 | \$187,490,000 |
| | Total | 3,400 | \$668,900,000 |
| University Athletics | Direct | 1,130 | \$386,780,000 |
| | Indirect | 600 | \$131,250,000 |
| | Induced | 700 | \$128,950,000 |
| | Total | 2,400 | \$646,970,000 |
| Total Operations | Direct | 2,900 | \$774,100,000 |
| | Indirect | 1,260 | \$224,400,000 |
| | Induced | 1,680 | \$316,400,000 |
| | Total | 5,840 | \$1,315,000,000 |

Note: All monetary values are presented in 2025 dollars. Figures may not sum due to rounding.

Data source: IMPLAN, 2024; ECONorthwest reports, 2024; UO and OSU, 2025; EADA, 2024; ECONorthwest analysis

Transient Lodging Tax Contribution

Sports-related travel can generate demand for lodging, particularly when events draw visitors from outside the local area who stay overnight. To understand how sporting events translate into hotel stays, lodging revenue, and transient lodging tax (TLT) collections, this analysis estimates the number of room nights associated with sports tourism and applies conservative assumptions about how visitors travel and where they stay.

The analysis focuses only on non-local overnight visitors who stay in hotels, motels, or short-term vacation rentals. Visitors staying with friends or family, or in other accommodation types, are excluded because they do not directly contribute to lodging revenue or TLT. Room nights are estimated by converting overnight visitation into lodging demand using average travel party sizes reported by Travel Oregon.²⁹ Party size varies across the state, from about 2.1 people per group in Multnomah County to 2.7 people per group in Union County. The analysis assumes one hotel room per travel party per night, an approach that understates lodging demand for families or groups who require multiple rooms. The estimated 501,000 non-local overnight spectators that are predicted to stay in a hotel, motel, or STVR would translate into roughly 223,000 room nights (see Exhibit 10).

Lodging revenue is estimated by applying average nightly room rates to the estimated number of room nights. These rates are based on the city level hotel and motel offerings by

²⁹ Travel Oregon. *The Economic Impact of Travel*. Dean Runyan Associates. April 2025.

https://industry.traveloregon.com/wp-content/uploads/2025/05/Oregon_2024_2025-05-01.pdf



month.³⁰ Hotel location is based on the location of the event venue, university, or sports teams. Room revenue associated with the selected spectator sports is estimated \$37.2 million, with over 80 percent occurring in Lane and Multnomah county.

Exhibit 10. Estimated Room Nights and Room Revenue by County, Oregon, 2024

| COUNTY | NON-LOCAL OVERNIGHT HOTEL, MOTEL, STVR VISITS | ESTIMATED ROOM NIGHTS | ESTIMATED ROOM REVENUE |
|--------------|---|-----------------------|------------------------|
| Lane | 209,235 | 90,972 | \$17,994,000 |
| Multnomah | 185,957 | 88,551 | \$11,724,000 |
| Benton | 53,535 | 21,414 | \$3,659,000 |
| Umatilla | 25,029 | 10,012 | \$1,531,000 |
| Clatsop | 11,208 | 4,670 | \$1,176,000 |
| Washington | 8,659 | 4,123 | \$636,000 |
| Deschutes | 3,966 | 1,653 | \$325,000 |
| Jackson | 2,563 | 1,114 | \$112,000 |
| Union | 1,599 | 639 | \$74,000 |
| Total | 501,751 | 223,148 | \$37,231,000 |

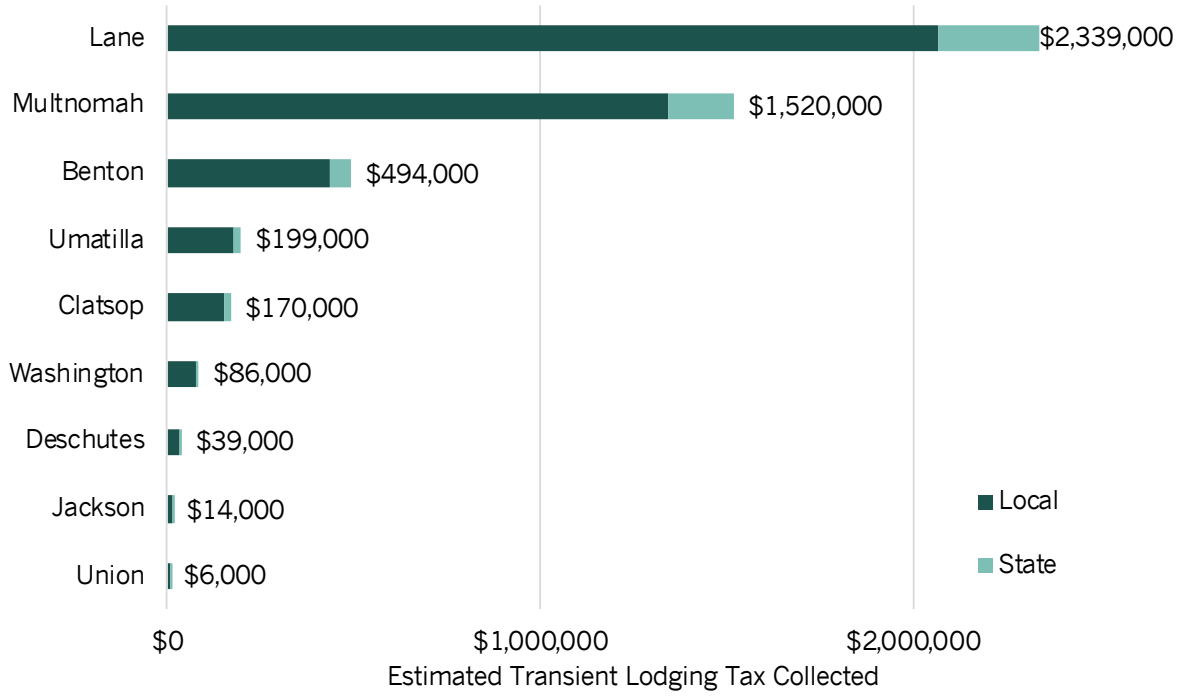
Note: All monetary values are presented in 2025 dollars. Figures may not sum due to rounding.
 Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; CoStar, 2024;; ECONorthwest analysis

Estimated TLT collections are calculated by applying Oregon’s statewide lodging tax rate of 1.5 percent, along with applicable city and county rates that generally range from 3 percent to 13 percent, to the estimated room revenue. An estimated \$4.9 million would be collected between state and local sources, with roughly \$560,000 allocated to state collections and \$4.3 million to city and county collections (see Exhibit 11).

³⁰ CoStar Group STR Data Insights Portal. <https://www.str.com/>



Exhibit 11. Estimated Transient Lodging Tax Collected by Entity and County, Oregon, 2024



Data source: Travel Oregon, 2025; Various municipal and county governments, 2025; ECONorthwest analysis



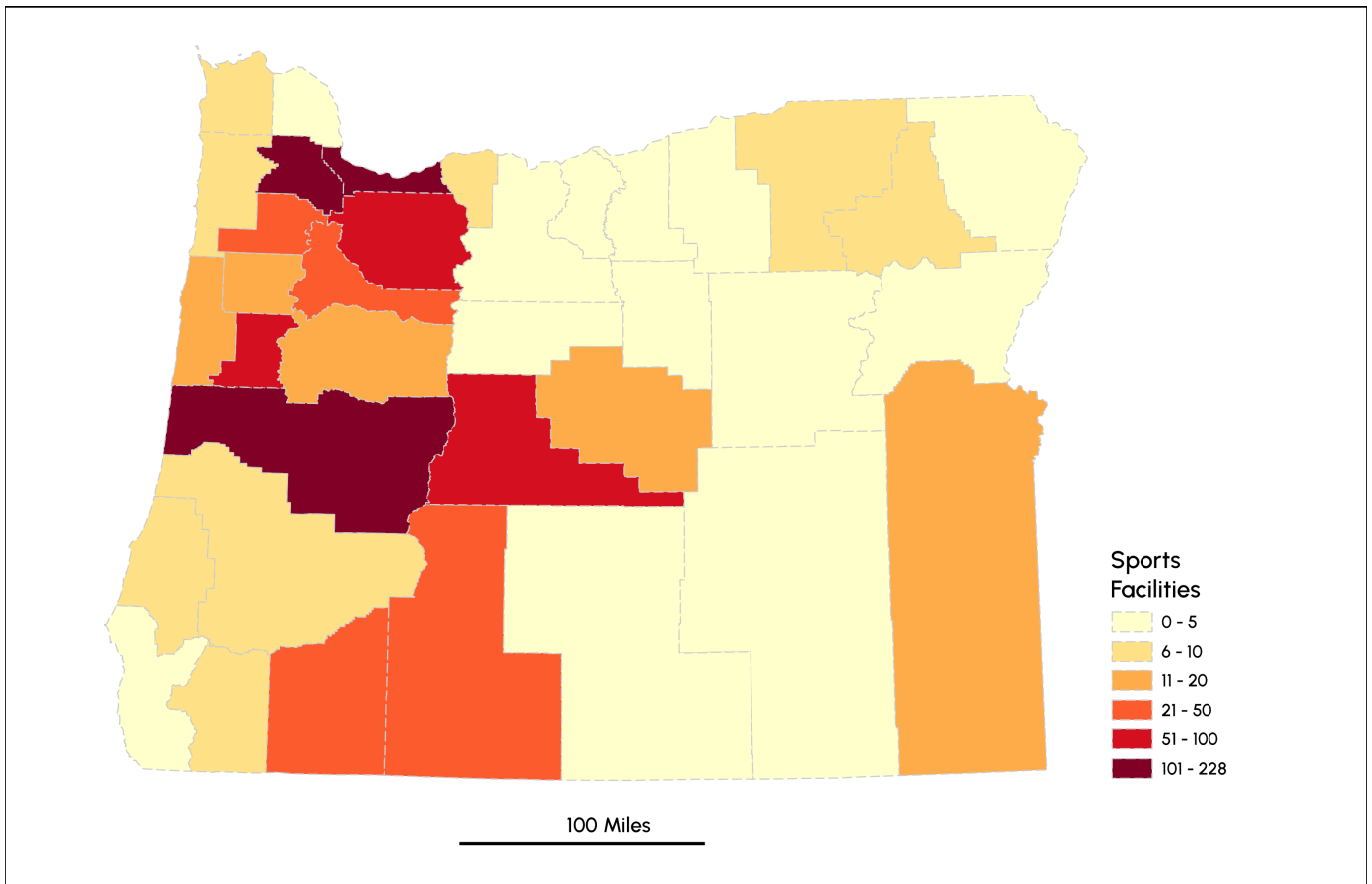
4. Appendix

Oregon Sports Facility Scan

ECONorthwest estimates that Oregon has 1,012 sports facilities across sport types and public and private entities. Multnomah, Washington, and Lane counties are home to 52 percent of all facilities in Oregon. However, on a per capita basis, southern and central Oregon counties have a higher concentration of sports facilities.

Fitness centers, baseball/softball fields, and racquet sport courts account for roughly half of the facilities.

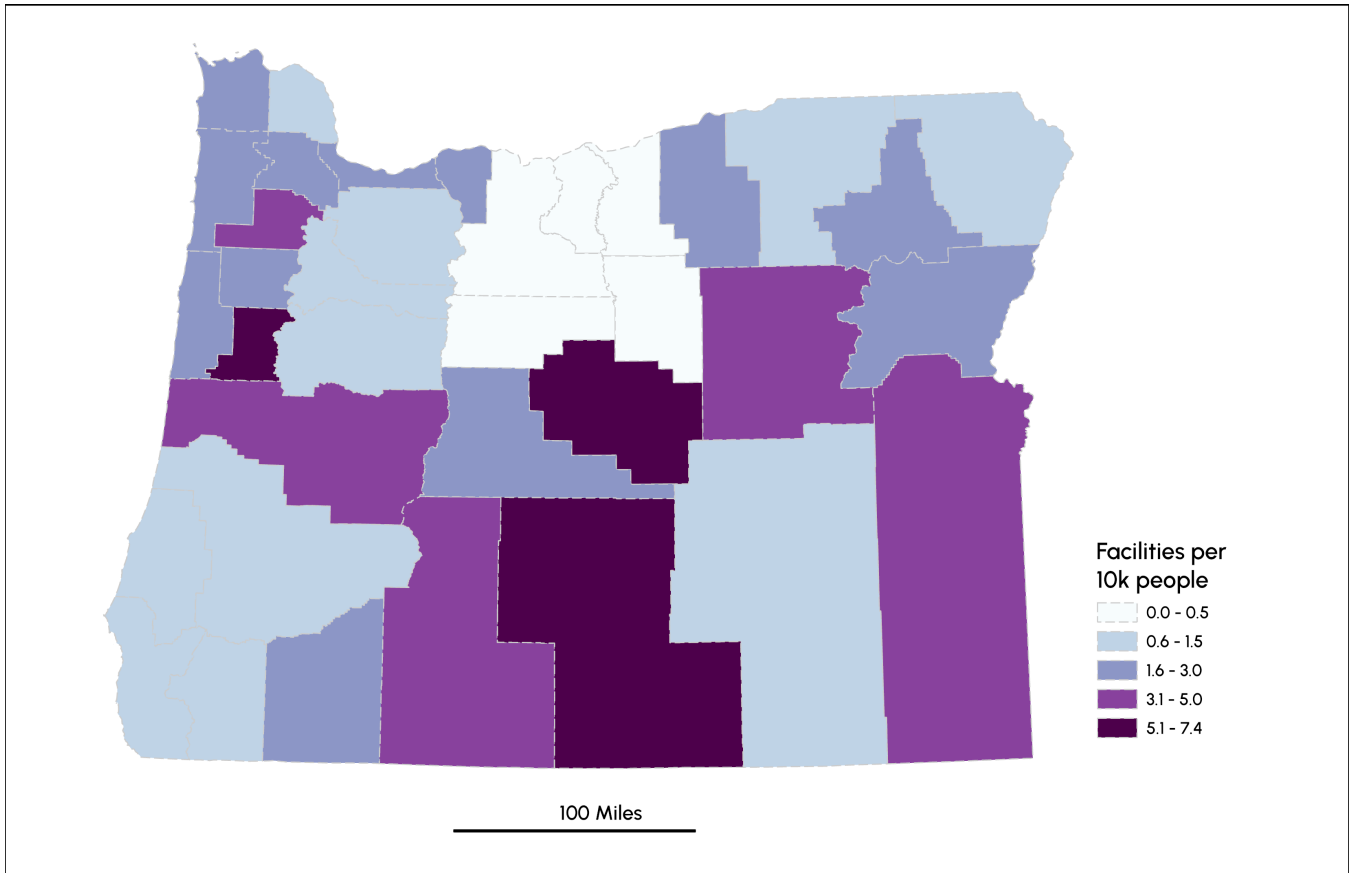
Exhibit 12. Sports Facilities by County, Oregon, 2025



Data source: OpenStreetMaps, 2025; ECONorthwest analysis



Exhibit 13. Sports Facilities Per Capita by County, Oregon, 2024



Data source: OpenStreetMaps, 2025; U.S. Census Bureau, ACS, 2024 5-year estimates. ECONorthwest analysis

Infrastructure Case Studies

Rogue X

Investment in sports infrastructure is starting locally. The Rogue Credit Union Community Complex, or Rogue X, is a City of Medford-owned and operated community park, and is currently one of the largest municipal recreation centers in the U.S.³¹ Construction roughly cost 76 million dollars and lasted around 3 years, with the center opening in 2024. The building is approximately 140,000 square feet, with 522 available parking spots. The total facility coverage is approximately 22 acres, and the total pool surface area is around 14,000 square feet.

In 2024, Rogue X's first year of operation, the center generated 6.7 million dollars, equivalent to 8.8 percent of the building's construction cost. Splitting up visitation by facility, the pool received 106,442 visitors, the drop-in sports venues received 18,271 visitors, and the rentable party space received 920 bookings in total. Notably, sports activities accounted for

³¹ Medford Parks, Recreation, and Facilities, *CITY OF MEDFORD ROGUE X 2024 ANNUAL REPORT (2024)*, <https://www.travelmedford.org/2024-rogue-x-economic-impact-report.pdf>.



two-thirds of economic impact, making a particularly notable impact for basketball and cornhole enthusiasts in Oregon. Rogue X's aquatic center is making more of a profound local impact, functioning as a home to Medford's high school swim team meets and Rogue Rapids, a non-profit focused on creating low-cost opportunities for young people to swim competitively. Beyond sports activities, Rogue X also hosted the Barnstormer's Holiday Bazaar craft fair, a two-day fair with 170 vendors and over 4,400 attendees, which brought in roughly 209,000 dollars.

The average revenue Rogue X generated per month in 2024 was \$116,440, with notable increases during the opening month of the center (January), spring and summer (February to August), followed by dips in revenue and visitation during the fall and winter (September to December). Overall, Rogue X hosted 44 major events that resulted in actual spending of \$3,648,253. Visitors, defined as people living outside of the Rogue Valley, to Medford spent almost \$1.5 million. Total spending by all building patrons is roughly \$6,749,269. Rogue X's strong first-year performance demonstrates its role as a significant community asset and economic driver, generating sustained visitor spending, supporting local employment, and delivering measurable returns on public investment.

Hayward Field

The Hayward Field is a track and field stadium located on the campus of the University of Oregon in Eugene, Oregon. Originally built in 1919, Hayward Field's presence and consistent use in major local, national, and international sporting events have helped propel Eugene, Oregon into its current nickname, TrackTown, USA. In 2018, the old Hayward Field was demolished, and in 2021, a new Hayward Field was constructed in its place, funded by a 200 million dollar donation from Nike co-founder Phil Knight.³² The most notable difference between the old and new version of Hayward Field is the substantial increase in seating capacity, raising from 10,500 in the old stadium to 12,650 permanent seats.³³

Hayward Field has served as a consistent economic driver for the Eugene region by hosting high-profile events that attract national and international participants. Although a single cumulative estimate of the venue's long-term economic impact is not available, individual events illustrate its significance. The 2024 Eugene Marathon weekend, for example, set participation records with more than 12,000 registrants from all 50 states and 28 countries across the marathon, half marathon, Eugene 5K, and Kid's Duck Dash. More than 10,000

³² Jeff Manning, "Jammed Hotels, Jacked-up Rates among the First Indicators of World Athletics Championships Economic Impact - Oregonlive.Com," accessed December 29, 2025, <https://www.oregonlive.com/oregon22/2022/05/jammed-hotels-jacked-up-rates-among-the-first-indicators-of-world-championships-economic-impact.html>.

³³ Bucket List Events, "New Hayward Field - Observations in Eugene, Oregon," Track and Field, *Travel Tours for Winter & Summer Games, Oktoberfest, World Cup & More*, July 17, 2021, <https://www.mybucketlistevents.com/new-hayward-field/>.



runners finished inside Hayward Field, marking a substantial increase from prior years. The event supported an estimated \$6.8 million in total economic output for the local economy.³⁴

Nationally, the National Scholastic Athletics Foundation (NSAF) and its partners, Nike, USA Track & Field (USATF), TrackTown USA, and Runner Space, hosted the 2024 Nike Outdoor Nationals and USATF U20 Championships at Hayward Field from June 12 to 15, 2024. Nearly 5,000 athletes competed for National Championships and World Championship berths during the event. The top-placing athletes in the U20 Championships earned spots on Team USA, which competed in the World Athletics U20 Championships in Lima, Peru in August 2024. The estimated economic impact was \$2.4 million. Hayward Field also hosted the 2025 NCAA Division I Outdoor Track and Field Championships. In 2024, participants contributed to an estimated economic impact of nearly \$9 million. Hayward Field is scheduled to continue hosting these championships from 2025 through 2028.

No stranger to the international stage, Hayward Field has hosted the U.S. Olympic Team Trials eight times since 1972.³⁵ The trials themselves bring an estimated \$25 to 30 million to the region. Hayward Field's role as a powerful and recurring economic engine generates substantial visitor spending and reinforces the city's position as a global destination for track

States like California, Texas, Florida, Georgia, and Nevada are often highlighted as top locations for major sporting events because of their mega-venues (i.e. SoFi Stadium, AT&T Stadium, Hard Rock Stadium, Mercedes-Benz Stadium, Allegiant Stadium), strong hotel/airport capacity, and event-friendly tax policies).³⁶ However, previous literature indicates that the construction of large sports stadiums is not the most effective public investment. Academic research and fiscal analyses consistently find that publicly financed stadiums rarely generate net new regional economic growth; instead, spending is often redistributed within the metro area.^{37,38} The most durable returns emerge when sports infrastructure is multi-use and capable of supporting year-round activity. For instance, U.S. venues like SoFi Stadium, Allegiant Stadium, and MSG Sphere act as year-round content and revenue engines (i.e. concerts), demonstrating the diversification of revenue available from a sports infrastructure investment. It's important to note the location placement of sports revenues should be completed thoughtfully, as sports stadiums can push residential property values up and subsequently push out long-term residents.

³⁴ Vobora, Andy. "TrackTown Shined in 2024 and 2025 Looks to Be Another Blockbuster Year." *Eugene, Cascades & Coast*, December 10, 2024. <https://www.eugene-cascades-coast.org/press-releases/post/tracktown-shined-in-2024-and-2025-looks-to-be-another-blockbuster-year/>

³⁵ Hannarose McGuinness, "US Olympic Track and Field Trials Bring Big Money to Lane County, Experts Say". *The Register-Guard*. Accessed December 2025. <https://www.registerguard.com/story/business/2024/06/20/eugene-hayward-field-welcome-u-s-olympic-trials-30m-economic-boost/74144952007/>.

³⁶ BookYourBlock. "Best States for Sports Event Hosting." Accessed February 2026. <https://www.bookyourblock.com/news-articles/best-states-for-sports-event-hosting>.

³⁷ John L. Crompton, "Public Subsidies to Professional Team Sports Facilities in the United States." *Journal of Sport Management* 27, no. 5 (2013): 379–389. <https://journals.humankinetics.com/view/journals/jsm/27/5/article-p379.xml>

³⁸ Clark Merrefield, "The Economics of Sports Stadium Public Financing," *The Journalist's Resource*, April 10, 2024, <https://journalistsresource.org/economics/sports-stadium-public-financing/>



Hillsboro Hops Ballpark

The Hillsboro Hops is constructing the Hillsboro Hops Ballpark in partnership with the City of Hillsboro to meet new Major League Baseball for full season play.³⁹ The total cost of the ballpark is roughly \$125 million dollars, with \$15 million from the Oregon State Legislature, \$82 million in private funds, \$18 million from the City of Hillsboro, \$8 million from Washington County, and \$2 million from Explore Tualatin Valley.⁴⁰ The total project cost is roughly \$150 million. Originally, the expected cost of construction was around \$120 million, however, costs increased to cover inflation and an adjusted project scope.

Construction on the new ballpark began construction in mid 2024, with completion expected ahead of the 2026 season. While the initial purpose of the stadium was to renovate an existing field to meet new Major League Baseball standards, project partners decided building a new facility is more cost-effective. The new ballpark will also serve as a year-round outdoor venue for concerts, festivals and community events, and sports games. Compared to the former stadium, the new stadium will have multiple kitchens and food service zones, improved field surface, and more shade.⁴¹

The Hops stadium will address a gap in Hillsboro for a mid-sized regional entertainment facility capable of supporting diverse events.⁴² The stadium is expected to host 10-20 concerts per year as well as collegiate baseball games, high school events, and corporate showcases. The non-baseball events are particularly important in making the stadium financially feasible, as the baseball team will need to travel significantly out of state during the season. The old stadium's capacity was roughly 5,000 attendees, while the new stadium is projected to hold 6,000 people for baseball games and up to 7,000 people for large events such as concerts. Many attendees for baseball games are home fans, roughly 90 percent, however, this tends to shift based on the popularity of visiting players. The ticket revenue per games at the old stadium were not publicly disclosed.

Destination Management Organization Survey

Between February and May 2025, ECONorthwest informed Oregon's 7 Regional Destination Management Organizations (DMO) as well as 10 key local DMOs of the purpose of the study and the use of data provided by them. In partnership with University of Portland, the survey was launched and distributed via Qualtrics in March 2025. Individual respondents for outreach as well as the local DMOs were identified by Sport OR.

³⁹ City of Hillsboro, "Hillsboro Hops Ballpark Project | City of Hillsboro, OR". Accessed December 2025. <https://www.hillsboro-oregon.gov/our-city/hillsboro-major-projects/hillsboro-hops-ballpark-project>.

⁴⁰ Minor League Baseball, "New Hillsboro Hops City-Owned Ballpark Fully Funded Thanks to Final \$15 Million Approval from Oregon State Legislature." MiLB.Com. Accessed December 2025. <https://www.milb.com/news/new-hillsboro-hops-city-owned-ballpark-fully-funded-thanks-to-final-15-million-approval-from-oregon-state-legislature>.

⁴¹ KL Wombacher, "Interview," September 12, 2025.

⁴² Minor League Baseball, "New Hillsboro Hops City-Owned Ballpark Fully Funded."



Drawing from the Sports Events & Tourism Association (Sports ETA) approach to sports tourism data collection, the survey asked questions regarding event counts, visitation, room nights, and financial support mechanisms as core inputs to economic impact analysis.

Engagement serves as a central strategy to:

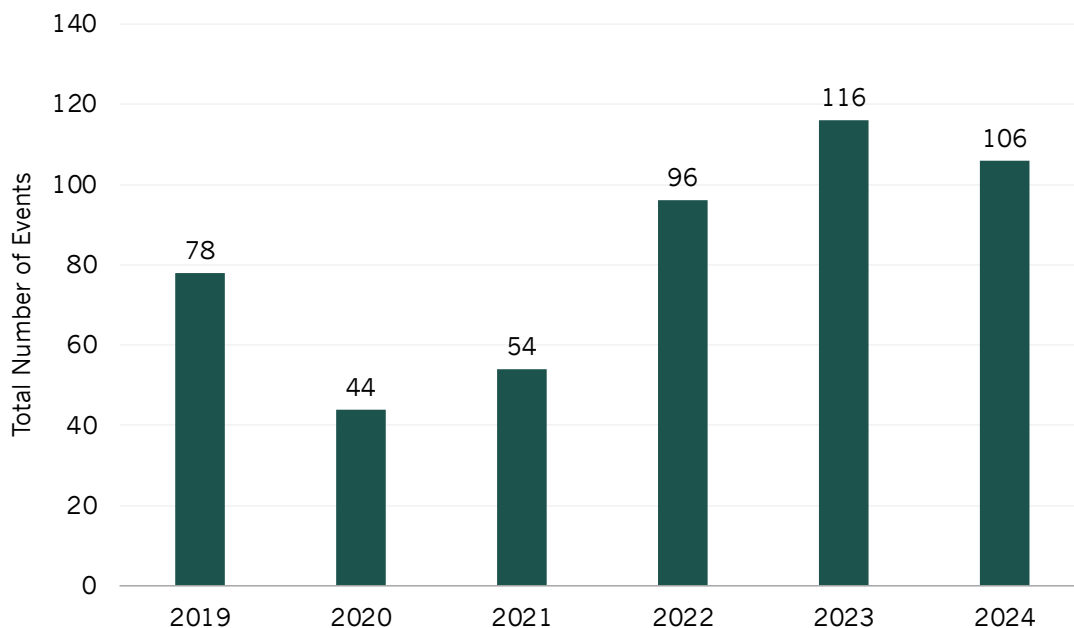
- ◆ **Inventory the scale and scope of sports events activity across Oregon**, including the number of events DMOs are involved with, support, or track over time, recognizing that **no centralized statewide database of sports events currently exists.**
- ◆ **Understand how DMOs engage with sports events**, including roles related to bidding, grants, staffing, coordination, and marketing, and how these activities vary by region.
- ◆ **Assess data availability and tracking capacity across destinations**, including what types of information DMOs collect (e.g., hotel room nights, teams participating, spectators, ticket sales) and the tools used to track those metrics.
- ◆ **Gather event-level detail where available**, as some DMOs were able to provide specific information on individual events, including number of teams, participants, spectators, hotel room nights, and funding support.

During two informational sessions held in February 2025, staff at RDMOs and DMOs highlighted that there is unevenness in tracking among organizations due to staff capacity.

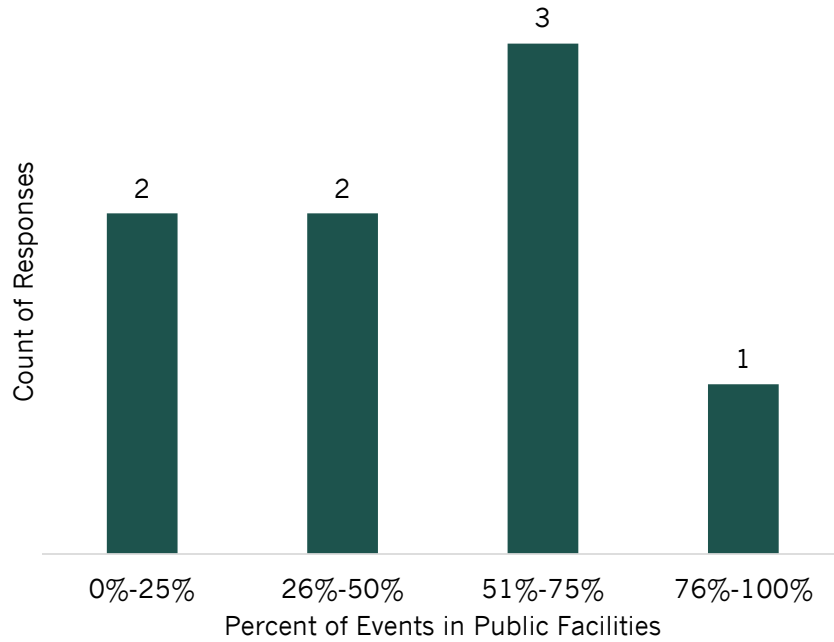
Selected Results

Of the 17 RDMOs and DMOs that outreach was conducted to, 8 separate entities responded. Results for selected questions are described below.

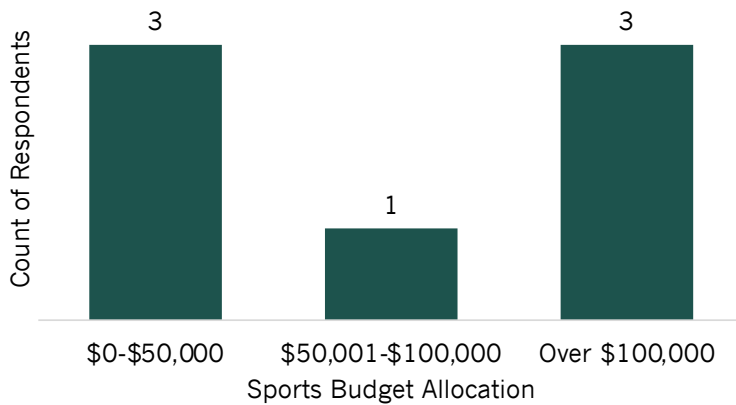
How many sports events did your organization host, manage, or have involvement with, in the past 5 years? (N=5)



In your region, what percentage of sports event are hosted in city, county, state or national Parks & Recreation owned facilities? (N=7)



What was your budget related to sports events in the most recent fiscal year? (N=7)

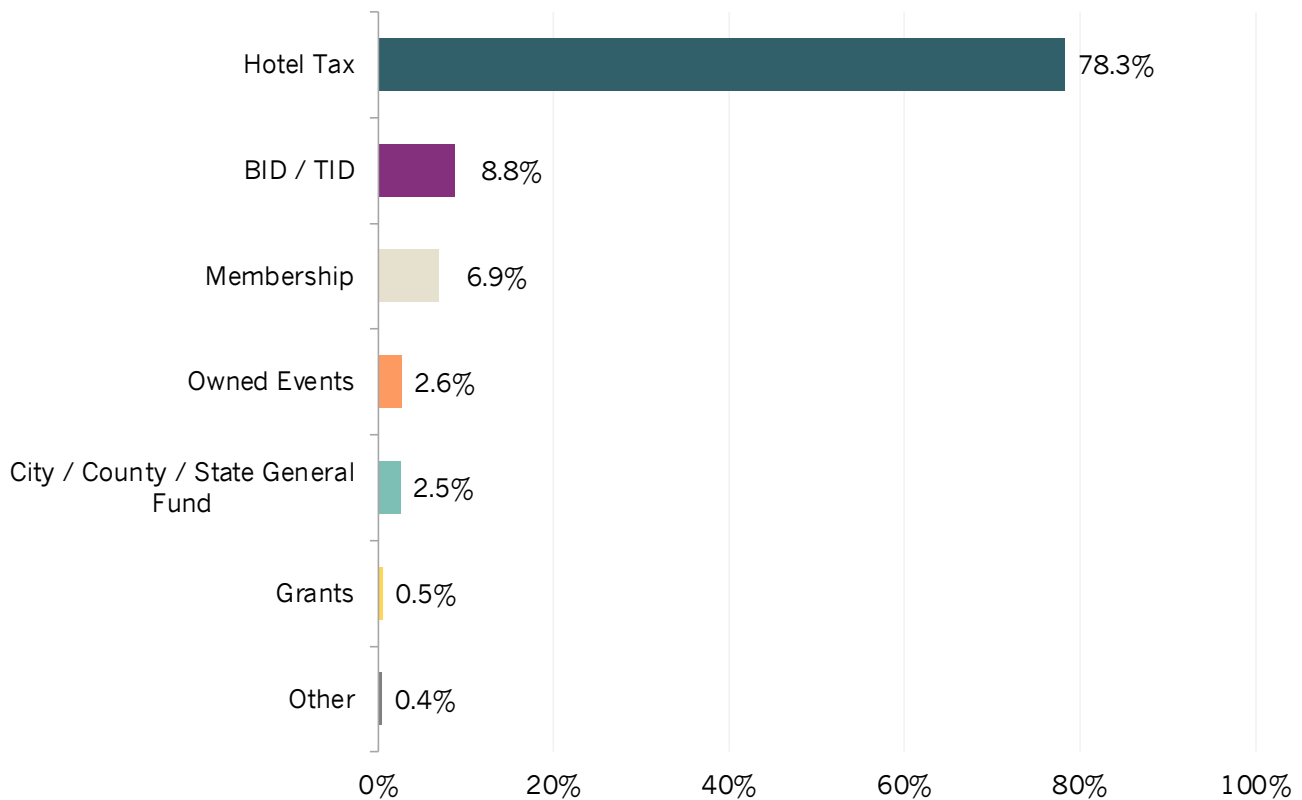


What was your budget related to sports events in the most recent fiscal year? (N=7)

- ◆ Average: 12%
- ◆ Median: 15%

How is your organization funded? (N=7)





What was the total bid fee funding pool for sports events in your destination in the most recent fiscal year? (N=7)

- ◆ Average: \$97,900
- ◆ Median: \$30,000

Does your region have adequate sports facilities and infrastructure to meet the demand from sports events? (N=7)

- ◆ Yes: 1
- ◆ No: 6

Please describe how sports facilities and infrastructure could better meet the demand of sports events in your region.

- “Right now, sports events and facilities are not a priority for our city and county. Their focus is mainly on housing and mental health issues. For this reason, the upkeep of many of our existing larger facilities has fallen behind and need to be better maintained and upgraded to keep up the demand for better amenities and growing competition in other destinations.”
- “We've outgrown capacity for current fields. We are unable to host large tournaments.”
- “More direct flights out of our local airport. Headquarter hotels at our sports venues. We could also use an indoor rec center.”



- “We don't have enough fields/grounds to host large-style tournaments and also don't have enough hotels in other areas of our county to host larger sporting events.”
- “The Pacific Northwest is heavily underserved in terms of sports tournament infrastructure, as opposed to our competition in the southeast and midwest. There is an intense excitement and curiosity about our city, region, and state, but we just don't have the facility infrastructure necessary to meet those needs. We are lacking in flexible flat space, courts, and ice.”
- “Our community lacks adequate traditional sports facilities, including gymnasiums, pools, softball/baseball diamonds, and rectangular fields. The most pressing need is a large indoor multi-use facility, particularly to address the significant gap during the shoulder season. Meeting winter demand is essential for our destination, and this space would offer substantial community benefits beyond its economic impact.”

Does your region have adequate air lift and/or other transportation capacity to meet the demand from sports events? (N=4)

- ◆ Yes: 4

Comments:

- “We can host regional events that are a driving distance to our destination, however, we will often lose out on national events that require families to fly in and rent a car for ease of access to different locations in our area.”
- “We have everything we need but the airlift. If people have to fly into Portland, why not just play in Portland?”

Survey Questions

Q1. What was your budget related to *sports events* in the most recent fiscal year (in \$)?

Q2. What percentage of your budget is allocated to *sports events* the most recent fiscal year (in \$)?

Q3. How many of the following staff member types do you employ that work on sports-related events? If no staff are designated to sports only, please provide the number of staff involved in sports-related work.

- ◆ Full-time
- ◆ Part-time
- ◆ Seasonal
- ◆ Contractors (Non-staff members)
- ◆ Interns



Funding

Q4. How is your organization funded? (Please enter the percentage of each funding type totaling 100%)

- ◆ Hotel Tax ____%
- ◆ City / County / State General Fund ____%
- ◆ BID / TID ____%
- ◆ Membership ____%
- ◆ Grants ____%
- ◆ Event Management Fees ____%
- ◆ Sponsorship ____%
- ◆ Owned Events _____%
- ◆ Private Funding _____%
- ◆ Operations/Rentals _____%
- ◆ Other ____%

Q5. Does your organization pay bid fees for *sports events* (in \$)? (Y/N)

Q6. How does your organization obtain money to pay bid fees? (Please check all that apply)

- ◆ Internal Budget
- ◆ City / County Funds
- ◆ State Funds
- ◆ Other (Please Specify) _____

Q7. What was the total bid fee funding pool for *sports events* in your destination in the most recent fiscal year (in \$)?

Q8. How did your organization's most recent fiscal year total bid fee funding pool for *sports events* change from fiscal year 2023 (in %)?

(Please enter either the % increased, % decreased, or write "remained the same")

- ◆ Increased by ____%
- ◆ Decreased by ____%
- ◆ Remained the same
- ◆ Unsure/not tracked

Q9. What was the average bid fee paid for *sports events* in the most recent fiscal year (in \$)?

Q10. What factors are considered when evaluating *sports events* bid fee requests? (Please check all that apply)



- ◆ Room nights
- ◆ Economic impact
- ◆ Earned media
- ◆ Exposure / brand awareness
- ◆ Revenue
- ◆ Social media
- ◆ Green / sustainability initiatives
- ◆ Community legacy
- ◆ Impact on resident quality of life
- ◆ Repeat business
- ◆ Other (Please Specify) _____

Q11. Does your destination have a local event grant program for *sports events*? (Y/N)

Q12. How is the local event grant program funded for *sports events*? (Please check all that apply)

- ◆ Internal Budget
- ◆ City / State Funds
- ◆ Other (Please Specify) _____

Q13. What was the total local event grant funding pool for your destination in the most recent fiscal year (in \$)? \$_____

Q14. Referring back to Q13, of the total local event grant funding pool, how much was allocated to *sports events* in the most recent fiscal year (in \$)? \$_____

Q15. How did your organization's most recent fiscal year local grant funding pool for *sports events* change from the past year? (Please enter either the % increased, % decreased, or write "remained the same")

- ◆ Increased by ____%
- ◆ Decreased by ____%
- ◆ Remained the same
- ◆ Unsure/not tracked

General Events Information

Q16. Who do you partner with for bids and event delivery (concessions, merchandise, marketing, etc.)? (Please check all that apply)

- ◆ Sports Commission
- ◆ CVB / RDMOS/DMOS



- ◆ City
- ◆ County
- ◆ Parks and Recreation
- ◆ Independent Facilities
- ◆ High Schools
- ◆ Colleges/Universities
- ◆ Private sector businesses
- ◆ Local Port Authorities
- ◆ Local Hotel / Motel Association
- ◆ Local Sport-Related Groups
- ◆ Other local businesses
- ◆ No One
- ◆ Other (Please Specify) _____

Q17. Does your organization host events that require “stay to play”? (Y/N)

Q18. Do you enforce your own stay-to-play policy within your organization? (Y/N)

Q19. Does your organization own or manage any of the following *sports events*? (Please check all that apply)

- ◆ Tournaments
- ◆ Hall of Fame Banquets
- ◆ Youth Sports Award Banquets
- ◆ Citywide / Regional / Statewide Sports Award Banquets
- ◆ Youth Sports Clinics / Camps: Partnering with Local Pro / Collegiate Coaches or Players
- ◆ Youth Sports Clinics / Camps: Other
- ◆ Other (please specify)_____

Q20. What percentage of *sports events* in your region are hosted in public parks and recreation facilities or land (City, County, State or Federally owned)? (Y/N)

Q21. Does your region have adequate *sports* facilities and infrastructure to meet the demand from sports events? (Y/N)

Q22. Does your region’s air lift and/or other transportation capacity impact the number of *sports events* hosted in your region? (Y/N)



Events Tracking

Q23. How many *sports events* did your organization host, manage, or have involvement with, in the past 5 years? Please enter the total number of *sports events*, if available, for each calendar year.

Q24. How many total hotel room nights were associated *with sports events* in your region, in the past 5 years? If known, please provide the number of hotel room nights and TLT associated with *sports events*, as well as the geography in which hotel rooms were booked and the source of the information.

Q25. How much financial support was given by your organization to *sports events* in your region, in the past 5 years? (*Bid fees, grants, and other financial support*)

Q26. Please provide the following information on each sporting event that your organization has knowledge of, and the source of that information for all events in the most recent calendar year (2024). If unsure of certain metrics, please leave blank.

- ◆ Event information (Name, Venue, Dates, Sport Type)
- ◆ Event host partners or sponsors
- ◆ Level of RDMO/DMO Involvement
- ◆ RDMO/DMO funding amount
- ◆ Teams participating
- ◆ Individual participating
- ◆ Hotel room nights
- ◆ Hotel room night revenue
- ◆ Transient lodging tax
- ◆ Number of spectators (local/non-local)
- ◆ Number of tickets sold and revenue



Selected Spectator Events

Exhibit 14. Selected Spectator Sports and Events, Oregon, 2024

| SPORTS TYPE | TEAM OR EVENT | TRAVEL OREGON REGION |
|---|---|----------------------|
| Professional and Semi-Pro | Eugene Emeralds | Willamette |
| | Hillsboro Hops | Portland |
| | Portland Winterhawks | Portland |
| | Springfield Drifters | Willamette |
| | Thorns | Portland |
| | Timbers | Portland |
| | Trail Blazers | Portland |
| | Rip City Remix | Portland |
| Collegiate | Bend Elks | Southern |
| | Corvallis Knights | Willamette |
| | Portland Pickles | Portland |
| | Portland State University: M/W Basketball, W Soccer | Portland |
| | Oregon State University: Football, Baseball, Softball, M/W Basketball, M/W Soccer, Track & Field, Wrestling, Gymnastics | Willamette |
| | University of Oregon: Football, Baseball, Softball, M/W Basketball, W Soccer, Track & Field, Lacrosse, Acrobatics, Volleyball | Willamette |
| | University of Portland: Baseball, M/W Basketball, M/W Soccer, Volleyball, Track & Field. | Portland |
| Annual or One-Off Spectator Events | American Cornhole Organization Oregon Major | Southern |
| | Cascade Collegiate Conference Soccer Championships | Southern |
| | Eastern Oregon Livestock Show | Eastern |
| | Elgin Stampede | Eastern |
| | Formula E | Portland |
| | The Standard Portland Classic | Portland |
| | Major League Table Tennis Portland | Portland |
| | Medford Rogues Know Your Role | Southern |
| | NASCAR Pacific Office Automation | Portland |



| | | |
|---|---------------------------------|------------|
| Annual or One-Off Spectator Events | Olympic Trials 2024 | Willamette |
| | Pendleton Roundup | Eastern |
| | Portland Disc Golf Championship | Portland |
| | Portland Grand Prix | Portland |
| | Rockstar Energy Open | Portland |
| | Seaside Beach Volleyball | Coast |
| | The Prefontaine Classic | Willamette |
| | USA Rugby Exhibition | Portland |
| | 8 Seconds Rodeo | Portland |

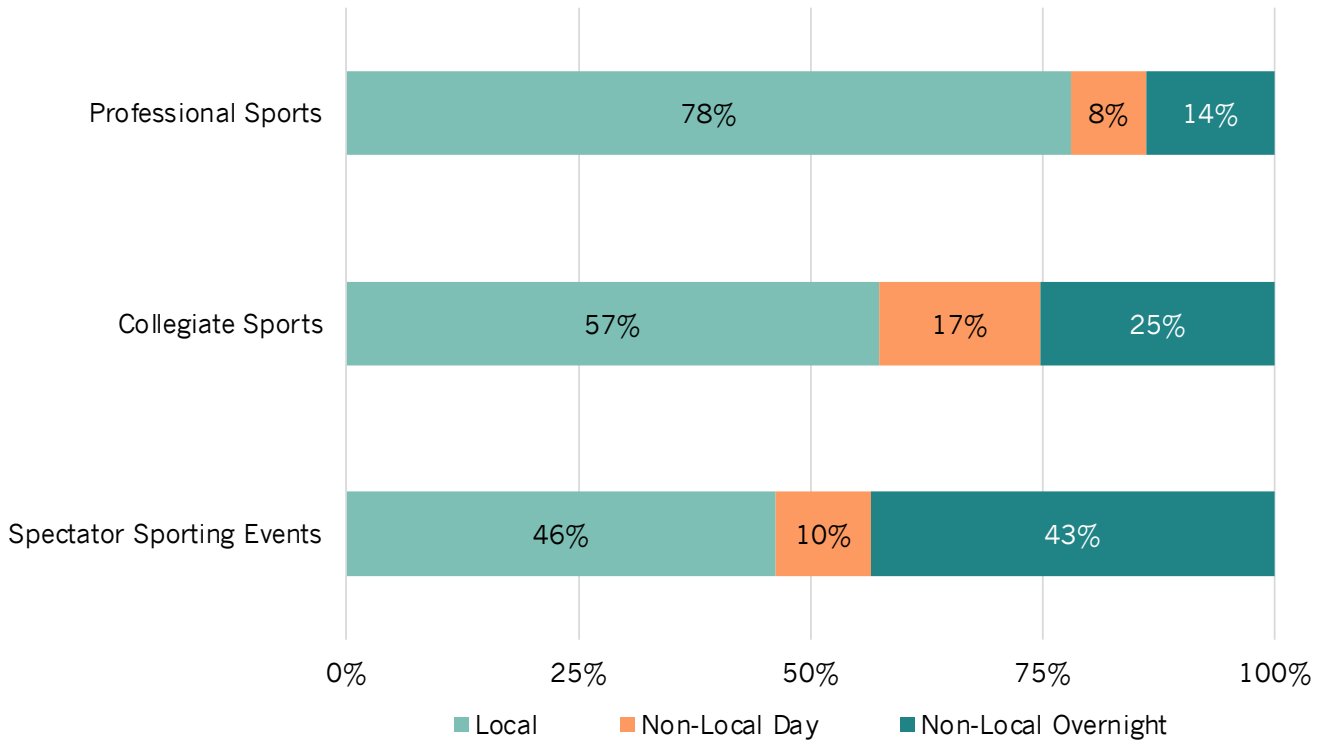
Source: Oregon DMO survey of events; Sport OR and ECOnorthwest selection process. Note: W= "Women"; M= "Men"

Visitation Estimates

Visitation estimates for spectator sports are segmented into local, non-local day, and non-local overnight categories to distinguish between spending that reallocates within the regional economy and spending that introduces new external demand. Local visitors are defined as residents living within a 50-mile driving radius of the event location, while non-local day visitors travel between 50 and 100 miles and return home the same day. Non-local overnight visitors travel more than 100 miles and are assumed to require overnight accommodations. This distance-based classification is applied consistently across professional sports, collegiate sports, and annual or one-off spectator events and is calculated based on the location of each event or game (see Exhibit 15).



Exhibit 15. Percentage of Spectator Sports Visitation by Distance and Event Type, Oregon, 2024



Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; ECONorthwest analysis

Because visitor spending varies significantly by lodging choice, non-local overnight visitation is further disaggregated by accommodation type. Overnight visitors staying in hotels, motels, or short-term vacation rentals typically spend more per day than visitors staying in private homes or other accommodations such as RVs or campgrounds. Accurately estimating economic impacts therefore requires distinguishing among accommodation types rather than applying a single average spending assumption to all overnight visitors.

Exhibit 16 presents the accommodation-type assumptions applied in this analysis, provided by Travel Oregon’s Destination Analyst Visitor Profiles by region and then rescaled to fit into three categories: hotel, motel, short-term vacation rental (STVR), private home, and other accommodations such as camping.⁴³ These assumptions reflect observed regional variation in lodging behavior and are applied to non-local overnight visitation estimates by Travel Oregon region. The resulting distribution of hotel, private home, and other overnight stays is then used to assign per-person, per-day spending levels in the economic contribution analysis. These estimates reflect all tourism across Oregon’s region and do not reflect sports-specific tourism which may have a higher estimate of hotel, motel, STVR.

⁴³ Travel Oregon, *2022 Oregon Visitor Profile*, Destination Analyst, June 2023, <https://industry.traveloregon.com/research/2022-oregon-visitor-profile/>.



Exhibit 16. Accommodation Type Assumptions for Non-local Overnight Visits, 2022

| ACCOMMODATION GROUP | HOTEL, MOTEL, STVR | PRIVATE HOME | OTHER |
|---------------------------------|--------------------|--------------|-------|
| <i>Oregon (Statewide)</i> | 58% | 29% | 13% |
| Portland Region | 59% | 31% | 10% |
| Oregon Coast | 57% | 30% | 14% |
| Willamette Valley | 58% | 30% | 12% |
| Central Oregon | 57% | 26% | 17% |
| Southern Oregon | 62% | 20% | 17% |
| Mt. Hood / Columbia River Gorge | 58% | 28% | 14% |
| Eastern Oregon | 60% | 20% | 20% |

Source: Travel Oregon, Destination Analyst Oregon Visitor Profile, 2022; ECONorthwest analysis

Exhibit 17 shows the visitation classifications estimated from Placer.ai by county for professional, collegiate, and spectator sporting events and then a further disaggregation of non-local overnight visitation by accommodation type. Regional accommodation type data presented in Exhibit 16 is applied to each relevant county. This approach ensures that spending estimates reflect both where sports-related visitation occurs and how visitors are likely to stay, providing a basis for estimating visitor spending and downstream economic contributions

Exhibit 17. Non-local Overnight Visitation by County and Accommodation Type, Oregon, 2024

| COUNTY | REGION | LOCAL | DAY TRIP | NON-LOCAL OVERNIGHT HOTEL | NON-LOCAL OVERNIGHT PRIVATE HOME | NON-LOCAL OVERNIGHT OTHER | TOTAL |
|-------------------|------------|------------------|----------------|---------------------------|----------------------------------|---------------------------|------------------|
| Multnomah | Portland | 1,407,808 | 154,555 | 182,558 | 96,513 | 29,363 | 1,870,797 |
| Lane | Willamette | 620,836 | 152,676 | 212,635 | 109,127 | 44,065 | 1,139,338 |
| Benton | Willamette | 331,696 | 145,921 | 53,535 | 27,475 | 11,094 | 569,721 |
| Washington | Portland | 135,898 | 2,982 | 8,659 | 4,578 | 1,393 | 153,510 |
| Umatilla | Eastern | 36,867 | 6,928 | 25,029 | 8,229 | 8,492 | 85,545 |
| Clatsop | Coast | 2,946 | 18,972 | 11,208 | 5,847 | 2,695 | 41,668 |
| Deschutes | Central | 26,764 | 876 | 3,966 | 1,281 | 1,109 | 33,996 |
| Union | Eastern | 24,003 | 2,118 | 1,599 | 526 | 542 | 28,788 |
| Jackson | Southern | 9,616 | 323 | 2,563 | 828 | 717 | 14,047 |
| Total | | 2,596,434 | 485,351 | 501,752 | 254,404 | 99,470 | 3,937,411 |
| Percent | | 66% | 12% | 13% | 6% | 3% | 100% |

Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; ECONorthwest analysis

Placer.ai Software Limitations

To estimate visitation patterns at spectator sports events, ECONorthwest uses information extrapolated by the analytics company Placer.ai. Placer relies on location data from location-based services on devices such as cellphones (for users who have enabled location sharing).



This data is then anonymized and aggregated using proprietary algorithms to provide insights on visitation patterns. We used Placer.ai's proprietary private services in the absence of consistent and reliable publicly available user data.

- ◆ Location-based devices rely on consistent GPS, wireless broadband (cell) or other telecommunication coverage. This can be limited in remote areas and may result in an undercount of sampled devices.
- ◆ Placer.ai's extrapolation of total visit may overestimate visitation. Placer estimates total visitation by applying proprietary algorithms that convert sample count to total estimates by controlling for elements such as the sample size relative to the population and the ratio of persons per device. The unique visitation opportunities in this area may not be captured accurately by Placer's algorithms.
- ◆ Visits to the area should not be interpreted as recreation use of the trails themselves. Any devices in the sample panel that spend time in the area will be coded as a visitor irrespective of the reason for the visit. We only capture panel visitors that spend more than 10 minutes in the study area to avoid capturing any passersby as visitors.
- ◆ Some changes in visitation trends may be due to changing data extrapolation algorithms. Placer applies its proprietary algorithms to the location data to generate visitation trends. These algorithms are subject to change and it is possible that some perceived trends are a result of this statistical process rather than actual, on-the-ground visitation.

Visitor Spending Profiles

Visitor spending profiles used in this analysis are based on Travel Oregon's Destination Analyst survey data, which report per-person, per-day visitor spending in 2021 dollar terms.⁴⁴ To ensure consistency with visitation data and economic modeling conducted for calendar year 2024 and to present results in current terms, all spending estimates were inflated to 2025 dollars using the U.S. Bureau of Labor Statistics Consumer Price Index for All Urban Consumers (CPI-U). Specifically, the annual CPI-U index increased from 292.6 in 2022 to 321.9 in 2025, corresponding to an inflation adjustment factor of 1.10. This scalar was applied uniformly across all Travel Oregon spending categories to convert reported spending levels to constant 2025 dollars.

Adjusted per-person, per-day spending estimates vary by Travel Oregon region and visitor accommodation type, reflecting differences in lodging costs, food and beverage prices, transportation patterns, and visitor behavior across the state. As shown in Exhibit 18, overnight visitors staying in hotels, motels, or short-term vacation rentals have the highest daily spending, followed by visitors using other accommodations such as campgrounds or

⁴⁴ Travel Oregon, *2021-2022 Oregon Visitor Profile*, Destination Analyst, June 2023, <https://industry.traveloregon.com/research/2022-oregon-visitor-profile/>.



RVs, and those staying in private homes. Day-trip visitors exhibit lower per-day spending due to the absence of lodging expenditures.

These region- and accommodation-specific spending profiles were applied to estimated visitation counts by visitor type to calculate total direct visitor spending for professional and collegiate sports and for annual or one-off spectator sporting events (see Exhibit 19).

Exhibit 18. Per-Person Per-Day Spending Estimates, Oregon (in 2025 dollars)

| REGION | DAY TRIP | OVERNIGHT HOTEL, MOTEL, STVR | OVERNIGHT OTHER ACCOMMODATION | OVERNIGHT PRIVATE HOME |
|---------------------------|--------------|------------------------------|-------------------------------|------------------------|
| Eastern | \$198 | \$297 | \$254 | \$210 |
| Central | \$187 | \$285 | \$238 | \$196 |
| Portland | \$187 | \$301 | \$251 | \$194 |
| Mt. Hood | \$185 | \$286 | \$238 | \$189 |
| Southern | \$184 | \$283 | \$238 | \$195 |
| Willamette | \$178 | \$279 | \$231 | \$182 |
| Coast | \$176 | \$274 | \$225 | \$178 |
| Oregon (Statewide) | \$179 | \$285 | \$236 | \$186 |

Data source: Travel Oregon, 2022; U.S. Bureau of Labor Statistics, CPI-U, 2025

Exhibit 19. Total Non-local Visitor Spending by Event and Visitor Type, Oregon (in 2025 dollars)

| VISITOR TYPE | PROFESSIONAL AND COLLEGIATE | SPECTATOR SPORTS EVENTS | TOTAL |
|---|-----------------------------|-------------------------|----------------------|
| Day trip | \$80,398,038 | \$7,627,835 | \$88,025,873 |
| Non-local Overnight Hotel, Motel, STVR | \$115,130,704 | \$29,703,970 | \$144,834,674 |
| Non-local Overnight Private Home | \$38,581,028 | \$9,078,582 | \$47,659,610 |
| Non-local Overnight Other Accommodation | \$17,829,448 | \$5,939,316 | \$23,768,764 |
| Total | \$251,939,217 | \$52,349,704 | \$304,288,921 |

Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; U.S. Bureau of Labor Statistics, CPI-U, 2025; ECONorthwest analysis

Total visitor spending was further disaggregated by commodity category to support economic contribution modeling. Exhibit 20 and Exhibit 21 present the resulting allocation of visitor spending by county and commodity for professional and collegiate sports and for spectator sporting events, respectively. These commodity-level spending estimates are linked to IMPLAN sectors and form the direct input to the IMPLAN model to ensure that downstream economic effects are assigned to the appropriate industries.



Exhibit 20. Professional and Collegiate Total Non-Local Visitor Spending by Commodity and County, Oregon (in millions of 2025 dollars)

| COMMODITY | BENTON | DESCHUTES | LANE | MULTNOMAH | WASHINGTON | TOTAL |
|----------------------------|----------------|---------------|----------------|-----------------|---------------|-----------------|
| Lodging | \$4.15 | \$0.29 | \$13.06 | \$13.10 | \$0.69 | \$31.29 |
| Restaurants / Dining | \$16.23 | \$0.42 | \$29.66 | \$32.77 | \$1.36 | \$80.44 |
| Retail | \$8.12 | \$0.24 | \$14.83 | \$14.98 | \$0.62 | \$38.78 |
| Recreation / Entertainment | \$7.59 | \$0.25 | \$13.87 | \$14.04 | \$0.58 | \$36.34 |
| Rental car | \$1.64 | \$0.11 | \$5.14 | \$6.07 | \$0.32 | \$13.28 |
| Gasoline | \$5.76 | \$0.24 | \$10.52 | \$8.89 | \$0.37 | \$25.79 |
| Grocery Stores | \$4.71 | \$0.18 | \$8.61 | \$8.89 | \$0.37 | \$22.77 |
| Ground Transportation | \$0.30 | \$0.07 | \$0.96 | \$1.83 | \$0.10 | \$3.25 |
| Total | \$48.51 | \$1.80 | \$96.65 | \$100.58 | \$4.40 | \$251.94 |

Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; U.S. Bureau of Labor Statistics, CPI-U, 2025; ECONorthwest analysis

Exhibit 21. Spectator Sporting Events Total Non-Local Visitor Spending by Commodity and County, Oregon (in millions of 2025 dollars)

| COMMODITY | CLATSOP | JACKSON | LANE | MULTNOMAH | UMATILLA | UNION | TOTAL |
|----------------------------|---------------|---------------|----------------|---------------|----------------|---------------|----------------|
| Lodging | \$0.88 | \$0.18 | \$3.44 | \$1.49 | \$1.81 | \$0.12 | \$7.91 |
| Restaurants / Dining | \$2.51 | \$0.26 | \$5.70 | \$2.89 | \$2.68 | \$0.26 | \$14.30 |
| Retail | \$1.24 | \$0.15 | \$2.85 | \$1.32 | \$1.71 | \$0.17 | \$7.44 |
| Recreation / Entertainment | \$1.19 | \$0.15 | \$2.67 | \$1.24 | \$1.87 | \$0.18 | \$7.31 |
| Rental car | \$0.32 | \$0.07 | \$1.35 | \$0.69 | \$0.74 | \$0.05 | \$3.22 |
| Gasoline | \$1.02 | \$0.15 | \$2.02 | \$0.78 | \$1.82 | \$0.18 | \$5.98 |
| Grocery Stores | \$0.85 | \$0.11 | \$1.66 | \$0.78 | \$1.55 | \$0.15 | \$5.11 |
| Ground Transportation | \$0.04 | \$0.05 | \$0.25 | \$0.21 | \$0.51 | \$0.03 | \$1.09 |
| Total | \$8.06 | \$1.12 | \$19.95 | \$9.39 | \$12.69 | \$1.14 | \$52.35 |

Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; U.S. Bureau of Labor Statistics, CPI-U, 2025; ECONorthwest analysis



Economic Contribution Modeling

Modeling Framework

IMPLAN is a regional input-output (I/O) model widely used to assess the economic contributions of events and many other types of projects. The IMPLAN model divides the economy into 528 sectors and models the linkages among them, including government and household spending. Using national industry and county-level economic data from the US Bureau of Economic Analysis, the US Census, and other government sources, IMPLAN models how spending in one sector of the economy is spent and re-spent in other sectors. The linkages are modeled through I/O tables that account for all dollar flows between different sectors of the economy.

The economic relationships modeled by IMPLAN allowed ECO to estimate the overall change in the economy that would result from operational spending and the estimated visitor spending (see Exhibit 22). ECO analyzed the dollars spent on operations and by visitors to determine the total economic contributions of the event within the Portland MSA. Direct visitor spending and sports operational spending can be traced through the economy to estimate the contribution to employment, labor income, and value added across sectors in the local economy. The summation of these impacts is referred to as the economic output.

Exhibit 22. Overview of Economic Impact Analysis Framework

Source: ECOnorthwest, 2024

CONTRIBUTION TYPE

Economic multipliers derived from the model were used to estimate total economic contributions. Total economic contributions consist of three components: direct, indirect, and induced impacts.



- ◆ **Direct effects** consist of expenditures made specifically for operations and the spending from visitors. These direct impacts generate economic activity elsewhere in the local economy through the multiplier effect, as initial changes in demand “ripple” through the local economy, supporting indirect and induced contributions.
- ◆ **Indirect effects** result from the direct expenditures on goods and services from suppliers within the local economy. Indirect effects are often referred to as “supply-chain” impacts because they involve interactions among businesses across different sectors.
- ◆ **Induced effects** result from the spending of households associated either directly or indirectly with the operations expenditures or visitor spending. Workers employed by Powell’s, for example, will use their income to purchase groceries and other household goods and services. Workers at businesses that use these supplies will do the same. Induced effects are also referred to as “consumption-driven” contributions.

CONTRIBUTION MEASURES

Economic contributions are assessed using the following measures that the 2023 IMPLAN model reports:

- ◆ **Jobs** are measured as the average number of employees engaged in full- or part-time work and can be considered a headcount.
- ◆ **Labor income** is expressed as the sum of employee compensation and proprietary income.
 - Employee compensation (wages) includes workers’ wages and salaries, as well as other benefits such as health, disability, and life insurance; retirement payments; and non-cash compensation, expressed as the total cost to the employer, including payroll taxes.
 - Proprietary income (business income) represents the payments received by business owners or self-employed workers.
- ◆ **Value added** represents the value of all final goods and services produced (i.e., the sum of intermediate stages of production). Value added is a subset of Output and accounts for the increase in value that the producer adds to inputs through the production process. Value added can be conceptualized as the impact on Gross Regional Product (GRP) for the local economy.
- ◆ **Output** is the total value of spectator sports operations and includes all components of the production function: labor income, taxes, profit, and intermediate inputs. Value added is therefore a subset of economic output.

LIMITATIONS OF INPUT-OUTPUT MODELS

I/O models are static models used to measure an economy's inputs and outputs based on data that represents the relationships within an economy at a specific point in time. This analysis uses data from the 2024 model year, which is the most recent year for which data is



available. The model then estimates how specific changes in inputs to an economy result in changes throughout the economy. This approach, known as a “partial equilibrium analysis,” works well when the modeled changes do not radically reshape the relationships within an economy or affect the fundamental characteristics of labor markets, prices, or property values.

Economic Contributions of Sports Tourist Spending

Input Assumptions

The visitor spending by commodity presented in Exhibit 20 and Exhibit 21 are associated with IMPLAN sectors that allow for accurate modeling of economic contributions. ECONorthwest links these commodities to IMPLAN sectors, as presented in Exhibit 23.

Exhibit 23. Visitor Spending Commodity Linked to IMPLAN Sectors

| VISITOR SPENDING COMMODITY | ASSOCIATED IMPLAN COMMODITY CODE |
|--|--|
| Lodging | 3489 (Hotels) |
| | 3490 (Other accommodations) |
| Restaurants / Dining | 3491 (Full-service restaurants) |
| | 3492 (Limited service restaurants) |
| | 3493 (All other food and drinking places) |
| Grocery Stores | 3389 (Retail - Food and beverage stores) |
| Retail | 3392 (Retail - Clothing and clothing accessories stores) |
| | 3393 (Retail - Sporting goods, hobby, musical instrument and book stores) |
| | 3394 (Retail - General merchandise stores) |
| | 3395 (Retail - Miscellaneous store retailers) |
| Recreation / Entertainment | 3478 (Performing arts companies) |
| | 3479 (Commercial Sports Except Racing) |
| | 3480 (Racing and Track Operation) |
| | 3481 (Independent artists, writers, and performers) |
| | 3482 (Promoters of performing arts and sports and agents for public figures) |
| | 3483 (Museums, historical sites, zoos, and parks) |
| | 3484 (Amusement parks and arcades) |
| | 3485 (Gambling industries (except casino hotels)) |
| 3486 (Other amusement and recreation industries) | |
| 3487 (Fitness and recreational sports centers) | |
| 3488 (Bowling centers) | |
| Rental Car | 3432 (Automotive equipment rental and leasing) |
| Gasoline | 3391 (Retail - Gasoline stores) |
| Ground transportation | 3400 (Transit and ground passenger transportation) |

Data source: IMPLAN, 2024; ECONorthwest analysis



Supplemental Results

Exhibit 24 and Exhibit 25 present results disaggregated by event types. Non-local visitation for professional and collegiate sports is higher than the selected spectator events and therefore accounts for most of the economic contribution. Additionally, the direct economic output does not match up with the estimated visitor spending, which totals \$304.3 million, because not all of those dollars stay within Oregon. Leakages to other states or outside of the country are primarily due to the supply chains within retail and wholesale industries. Of the \$304.3 million in visitor spending estimated, only \$222.5 million stays within the state economy.

Exhibit 24. Economic Contributions of Professional and Collegiate Non-Local Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|--------------|----------------------|----------------------|----------------------|
| Direct | 1,600 | \$66,500,000 | \$102,200,000 | \$184,500,000 |
| Indirect | 370 | \$28,300,000 | \$43,900,000 | \$81,100,000 |
| Induced | 390 | \$25,400,000 | \$45,700,000 | \$73,500,000 |
| Total | 2,360 | \$120,100,000 | \$191,900,000 | \$339,100,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Exhibit 25. Economic Contributions of Spectator Sporting Events Non-Local Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|------------|---------------------|---------------------|---------------------|
| Direct | 320 | \$13,600,000 | \$21,100,000 | \$38,000,000 |
| Indirect | 80 | \$5,800,000 | \$9,000,000 | \$16,700,000 |
| Induced | 80 | \$5,200,000 | \$9,400,000 | \$15,100,000 |
| Total | 480 | \$24,700,000 | \$39,500,000 | \$69,800,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Exhibit 26 through Exhibit 29 shows the economic contributions associated with professional, collegiate, and spectator events disaggregated by non-local visitor and accommodation types. Hotel overnight visits account for the largest percentage of visitor counts as well as having the largest per-person per-day spending values, which translate into the largest economic contributions.

Exhibit 26. Economic Contributions of Non-Local Day Trip Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|------------|---------------------|---------------------|----------------------|
| Direct | 570 | \$22,100,000 | \$32,400,000 | \$58,700,000 |
| Indirect | 120 | \$8,900,000 | \$14,100,000 | \$26,100,000 |
| Induced | 130 | \$8,300,000 | \$15,100,000 | \$24,100,000 |
| Total | 810 | \$39,400,000 | \$61,400,000 | \$108,900,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis



Exhibit 27. Economic Contributions of Non-local Hotel, Motel, and STVR Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|--------------|---------------------|----------------------|----------------------|
| Direct | 900 | \$39,400,000 | \$64,000,000 | \$114,200,000 |
| Indirect | 230 | \$17,400,000 | \$26,800,000 | \$49,300,000 |
| Induced | 240 | \$15,200,000 | \$27,400,000 | \$44,100,000 |
| Total | 1,370 | \$72,000,000 | \$118,200,000 | \$207,600,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Exhibit 28. Economic Contributions of Non-local Private Home Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|------------|---------------------|---------------------|---------------------|
| Direct | 260 | \$10,000,000 | \$14,400,000 | \$26,200,000 |
| Indirect | 110 | \$6,300,000 | \$9,600,000 | \$17,700,000 |
| Induced | 70 | \$4,700,000 | \$8,200,000 | \$13,600,000 |
| Total | 380 | \$18,700,000 | \$29,100,000 | \$51,300,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Exhibit 29. Economic Contributions of Non-local Other Accommodation Visitor Spending, Oregon, 2024

| CONTRIBUTIONS TYPE | EMPLOYMENT | LABOR INCOME | VALUE ADDED | OUTPUT |
|--------------------|------------|---------------------|---------------------|---------------------|
| Direct | 150 | \$6,200,000 | \$9,200,000 | \$17,300,000 |
| Indirect | 40 | \$2,800,000 | \$4,400,000 | \$8,000,000 |
| Induced | 40 | \$2,400,000 | \$4,400,000 | \$7,000,000 |
| Total | 220 | \$11,500,000 | \$18,000,000 | \$32,400,000 |

Source: IMPLAN, 2024; Placer.ai, 2024; Travel Oregon, 2022; ECONorthwest analysis

Economic Contributions of Sports Teams and Athletics Department Operations

To estimate the economic contributions associated with sports operations in Oregon, ECONorthwest and Sport OR jointly determined that a compilation-based approach leveraging existing, relevant, and accessible data sources would provide the most defensible and efficient basis for analysis. Rather than attempting to reconstruct detailed operating budgets for every team and institution, the analysis draws on a combination of previously published economic impact studies for professional sports teams and publicly available financial and employment data for university athletics departments, supplemented by IMPLAN modeling where necessary.

This approach reflects both data availability constraints and the objective of capturing the ongoing operational footprint of sports organizations that underpin Oregon’s sports tourism ecosystem. These operations represent the permanent staffing, purchasing, and



organizational activity required to host events and attract spectators and participants from outside the region.

Some professional sports team and university athletics data reflect fiscal year 2023 rather than fiscal year 2024, due to reporting cycles and data availability. ECONorthwest did not independently estimate the economic contributions associated with the University of Oregon and Oregon State University athletics departments. Instead, the analysis relies on externally prepared studies that may employ methodological assumptions or modeling approaches that may differ from those used elsewhere in this report. While these studies provide credible and detailed estimates, differences in scope or modeling choices may affect comparability across institutions.

This analysis does not capture the operational impacts associated with one-off event production, temporary staffing, or the ongoing operations of certain large venues that host sporting events but are not directly operated by teams or athletics departments. As a result, the estimates presented in Exhibit 30 and Exhibit 31 should be interpreted as rough measures of the economic contributions associated with sports operations in Oregon.

Exhibit 30. Economic Contributions of Professional Sports Teams Operations, Oregon, 2024

| CONTRIBUTION TYPE | JOB | LABOR INCOME | VALUE ADDED | ECONOMIC OUTPUT |
|-------------------|--------------|----------------------|----------------------|----------------------|
| Direct | 1,770 | \$275,830,000 | \$344,930,000 | \$387,300,000 |
| Indirect | 660 | \$32,670,000 | \$53,860,000 | \$93,150,000 |
| Induced | 975 | \$67,640,000 | \$121,570,000 | \$187,490,000 |
| Total | 3,400 | \$376,140,000 | \$520,370,000 | \$667,940,000 |

Source: IMPLAN, 2024; ECONorthwest reports, 2024 and 2025; ECONorthwest analysis



Exhibit 31. Economic Contributions University Athletics Department Operations, Oregon, 2024
(in millions of 2025 dollars)

| UNIVERSITY | DIRECT JOBS | TOTAL JOBS | DIRECT ECONOMIC OUTPUT | TOTAL ECONOMIC OUTPUT | SOURCE |
|---------------------------|-------------|------------|------------------------|-----------------------|---|
| University of Oregon | 282 | 832 | \$154.2M | \$262.2M | UO Economic Impact Report, Parker Strategy Group, 2025 ¹ |
| Oregon State University | 755 | 1,367 | \$204.4M | \$325.4M | OSU Economic Impact Report, Parker Strategy Group, 2025 ² |
| Portland State University | 50 | 127 | \$13.8M | \$30.6M | EADA, Employment and Expenses for FY2023, IMPLAN model run by ECONorthwest ³ |
| University of Portland | 41 | 26 | \$14.3M | \$28.7M | EADA, Employment and Expenses for FY2023, IMPLAN model run by ECONorthwest ⁴ |

¹University of Oregon, FY24 Economic Impact Report, 2025. (page 15).
<https://news.uoregon.edu/sites/default/files/2025-11/uo-economic-impact-report.pdf>

²Oregon State University, FY24 Economic Impact Report, 2025. (page 30).
<https://leadership.oregonstate.edu/sites/leadership.oregonstate.edu/files/2025-07/Economic%20Impact%20Report%20OSU.pdf>

³U.S. Department of Education, Equity In Athletics Data Analysis, PSU, FY 2023.
<https://ope.ed.gov/athletics/#/institution/search>

⁴U.S. Department of Education, Equity In Athletics Data Analysis, UP, FY 2023.
<https://ope.ed.gov/athletics/#/institution/search>

Transient Lodging Tax Estimation

Transient lodging tax (TLT) impacts associated with sports-related visitation are estimated by combining information on overnight lodging demand, average room rates, and applicable state and local tax rates. The analysis builds directly on the visitation and lodging assumptions described earlier in the report and is designed to estimate the lodging-related fiscal effects associated with non-local overnight visitors staying in hotels, motels, or short-term vacation rentals.

Local lodging tax structures in Oregon vary by jurisdiction. In some locations, city and county lodging taxes apply concurrently, while in others only a city or a county tax is levied. Exhibit 32 summarizes the applicable city and county TLT rates for selected jurisdictions included in the analysis and presents the combined state, city, and county tax rate used to estimate total lodging tax collections. Oregon’s statewide lodging tax rate of 1.5 percent is applied



uniformly across all jurisdictions, while local rates are drawn from city, county, and state sources. Where both city and county taxes apply, rates are added together; where only one local tax applies, the combined rate reflects that structure.

Exhibit 32. Transient Lodging Tax Rates, Oregon

| CITY | CITY TLT RATE | COUNTY | COUNTY TLT RATE | COMBINED STATE, CITY, AND COUNTY |
|-----------|---------------|------------|-----------------|----------------------------------|
| Medford | 11.0% | Jackson | 0.0% | 12.5% |
| Union | 5.0% | Union | 3.0% | 9.5% |
| Elgin | 0.0% | Union | 3.0% | 4.5% |
| Portland | 6.0% | Multnomah | 5.5% | 13.0% |
| Eugene | 4.5% | Lane | 7.0% | 13.0% |
| Pendleton | 8.0% | Umatilla | 3.5% | 13.0% |
| Estacada | 0.0% | Multnomah | 5.5% | 7.0% |
| Seaside | 10.0% | Clatsop | 3.0% | 14.5% |
| Corvallis | 9.0% | Benton | 3.0% | 13.5% |
| Hillsboro | 3.0% | Washington | 9.0% | 13.5% |
| Bend | 10.4% | Deschutes | 0.0% | 11.9% |

Sources:

City of Medford, "City Council Outlines Intent for Proposed Lodging Tax Increase," accessed January 2026, <https://www.medfordoregon.gov/News-Articles/City-Council-Outlines-Intent-for-Proposed-Lodging-Tax-Increase>.

Oregon Department of Revenue, "Lodging Tax," accessed January 2026, <https://www.oregon.gov/dor/programs/businesses/pages/lodging.aspx>.

La Grande Observer, "Union Transient Lodging Tax May Be in Place by July 1," April 16, 2022, <https://lagrandeobserver.com/2022/04/16/union-transient-lodging-tax-may-be-in-place-by-july-1/>.

City of Portland, "Transient Lodgings Tax," accessed January 2026, <https://www.portland.gov/revenue/transient-lodgings-tax>.

Multnomah County, "Multnomah County Transient Lodging Tax," accessed January 2026, <https://multco.us/info/multnomah-county-transient-lodging-tax>.

City of Pendleton, "Transient Lodging Tax," accessed January 2026, via Oregon Department of Revenue, <https://www.oregon.gov/dor/programs/businesses/pages/lodging.aspx>.

City of Umatilla, Code of Ordinances, Title 3, Chapter 5, "Transient Room Tax," accessed January 2026, https://library.municode.com/or/umatilla/codes/code_of_ordinances?nodeId=COOR_TIT3BULIPR_CH5TRROTA.

Travel Oregon, Local Transient Lodging Tax Report, January 2020, https://industry.traveloregon.com/wp-content/uploads/2020/01/Local-Transient-Lodging-Tax-Report_FINAL-Jan-2020.pdf.

Clatsop County, "Transient Room Tax," accessed January 2026, <https://www.clatsopcounty.gov/assessment/page/transient-room-tax>.

City of Corvallis, "Lodging Tax FAQs," accessed January 2026, <https://www.corvallisoregon.gov/finance/page/lodging-tax-faqs>.

Washington County, "Transient Lodging Tax," accessed January 2026, <https://www.washingtoncountyor.gov/finance/transient-lodging-tax>.

City of Bend, "Room Tax," accessed January 2026, <https://bendoregon.gov/departments/administration/finance/room-tax/>.

Deschutes County, "Transient Room Tax," accessed January 2026, <https://www.deschutes.org/finance/page/transient-room-tax>.

Average daily room rates used to estimate lodging revenue are shown in Exhibit 33. These rates are based on the city level hotel and motel offerings by month. Hotel location is based on the location of the event venue, university, or sports teams. Due to limited data on Estacada, Elgin, and Union, county-level estimates were used. Union County data was only available from May through December 2025 producing an ADR of \$116 that was used across months. Selection of ADR is based on both the location of the event as well as the month or months applicable. For professional and university sports, room rates were averaged across the relevant months within a season for which the teams play.



Exhibit 33. Average Daily Rate by City, January-December 2024

| MONTH | BEND | ESTACADA | CORVALLIS | EUGENE | HILLSBORO | MEDFORD | PENDLETON | PORTLAND | SEASIDE |
|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Jan | \$107 | \$124 | \$139 | \$140 | \$136 | \$94 | \$91 | \$125 | \$105 |
| Feb | \$115 | \$129 | \$154 | \$145 | \$143 | \$95 | \$100 | \$130 | \$134 |
| Mar | \$122 | \$127 | \$157 | \$145 | \$146 | \$98 | \$104 | \$133 | \$138 |
| April | \$124 | \$130 | \$162 | \$162 | \$148 | \$101 | \$108 | \$139 | \$146 |
| May | \$152 | \$130 | \$178 | \$165 | \$151 | \$113 | \$112 | \$134 | \$158 |
| June | \$197 | \$146 | \$213 | \$280 | \$159 | \$125 | \$122 | \$149 | \$193 |
| July | \$218 | \$151 | \$165 | \$172 | \$161 | \$130 | \$129 | \$148 | \$244 |
| Aug | \$188 | \$151 | \$161 | \$170 | \$160 | \$121 | \$120 | \$149 | \$252 |
| Sept | \$164 | \$138 | \$198 | \$183 | \$153 | \$113 | \$153 | \$141 | \$166 |
| Oct | \$143 | \$131 | \$183 | \$208 | \$149 | \$110 | \$108 | \$140 | \$134 |
| Nov | \$117 | \$125 | \$193 | \$170 | \$141 | \$99 | \$99 | \$126 | \$116 |
| Dec | \$112 | \$123 | \$144 | \$131 | \$135 | \$93 | \$92 | \$119 | \$108 |
| Avg. | \$147 | \$134 | \$170 | \$173 | \$149 | \$108 | \$111 | \$136 | \$158 |

Source: CoStar, 2024.

Estimated lodging tax collections shown in Exhibit 34 are calculated by applying the combined state and local TLT rates to estimated room revenue at the county level. Local TLT collections represent the combined city and county portions, while state TLT collections reflect Oregon’s statewide rate. All monetary values are presented in 2025 dollars and reflect lodging activity attributable to sports-related travel only.



Exhibit 34. Estimated Transient Lodging Tax Collections, Oregon, 2024

| COUNTY | LOCAL TLT COLLECTIONS | STATE TLT COLLECTIONS | TOTAL TLT COLLECTIONS |
|--------------|-----------------------|-----------------------|-----------------------|
| Lane | \$2,069,000 | \$270,000 | \$2,339,000 |
| Multnomah | \$1,345,000 | \$176,000 | \$1,520,000 |
| Benton | \$439,000 | \$55,000 | \$494,000 |
| Umatilla | \$176,000 | \$23,000 | \$199,000 |
| Clatsop | \$153,000 | \$18,000 | \$170,000 |
| Washington | \$76,000 | \$10,000 | \$86,000 |
| Deschutes | \$34,000 | \$5,000 | \$39,000 |
| Jackson | \$12,000 | \$2,000 | \$14,000 |
| Union | \$5,000 | \$1,000 | \$6,000 |
| Total | \$4,309,000 | \$560,000 | \$4,867,000 |

Note: All monetary values are presented in 2025 dollars. Figures may not sum due to rounding.
 Data source: Placer.ai, 2024; Collegiate attendance trackers, 2024; Travel Oregon, 2022; Travel Oregon, 2025; ECONorthwest analysis

