



600 NE Grand Ave.
Portland, OR 97232-2736

Council work session agenda

Tuesday, March 12, 2024

10:30 AM

Metro Regional Center, Council Chamber

<https://zoom.us/j/615079992> Webinar ID:

615 079 992 or 888-475-4499 (toll free)

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10:30 Call to Order and Roll Call

10:35 Work Session Topics:

10:35 Expo Future project update

[24-6018](#)

Presenter(s): Paul Slyman (he/him), GM of Major Projects, Metro
Stephanie Redman (she/they), Expo Future Project
Manager, Metro
James Jessie, Travel Portland
Ed Washington, PSU

Attachments: [Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)
[Attachment 3](#)
[Attachment 4](#)
[Attachment 5](#)
[Attachment 6](#)

11:50 Chief Operating Officer Communication

11:55 Councilor Communication

12:00 Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការប្រឹក្សាស្តីពីការរើសអើងសូមទូរស័ព្ទទៅលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រសិនបើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រសិនបើលោកអ្នក មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេបកប្រែសម្រាប់លោកអ្នក ។

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Expo Future Project Update
Work Session Topic

Metro Council Work Session
Tuesday, March 12, 2024

EXPO FUTURE PROJECT: PHASE 2 UPDATE

Date: February 26, 2024
Department: Chief Operating Officer
Meeting Date: March 12, 2024
Prepared by: Paul Slyman, Stephanie Redman

Presenter(s):
Paul Slyman, he/him, GM of Major projects
Stephanie Redman, she/they, Expo Future Project Manager
Ed Washington, Expo Future Historical Significance & Memorialization Committee Cochair and PSU Professor Emeritus
James Jessie, Expo Future Sport & Facility Committee Cochair and Travel Portland Chief Sales Officer

Length: 45 minutes

ISSUE STATEMENT

In 2000, 2003, 2011, 2014, and in the years following, Metro Council and the Metropolitan Exposition and Recreation Commission (MERC) studied the long-term sustainability of the Portland Expo Center (“Expo”). Under the current business model, long-term prospects of Expo are challenging due to the large-scale capital needs of Halls A, B, and C and the routine maintenance of the newer buildings and campus infrastructure. Recognizing there is no identified funding source to meet these needs over time, Metro and MERC commissioned a series of activities in late 2019 to determine the highest, best use for the site that brings about financial sustainability. This launched the Development Opportunity Study (DOS) and a Request for Expressions of Interest (RFEI), also known as Phase 1 of the Expo Future project.

In February 2023, Council and MERC unanimously supported clear direction for Expo Future, with two overarching objectives proposed by Metro’s Chief Operating Officer at the conclusion of Phase 1:

Objective 1: Metro will recognize Expo Center’s Hall A as a site of national historical significance and meaningfully memorialize the site’s history of forced displacement during World War II and the Vanport Floods, as well as the site’s pre-colonial history and importance to Indigenous Peoples.

Objective 2: Leveraging Oregon’s status as an international powerhouse in the sport and outdoor industry, Metro will pivot Expo’s future redevelopment as a community-centric destination venue that prioritizes amateur, professional, and recreational sports.

In addition, Council and MERC instructed Metro’s Chief Operating Officer to initiate the next phase of the Expo Future project: the due diligence necessary to determine if the project’s objectives will result in a business, redevelopment, and capital investment plan(s) that realizes the highest and best public use of the site and achieves financial sustainability for Expo. **Without further action or investment, Expo will continue to operate without a long-term plan for financial sustainability.**

Since Council and MERC approved the COO's six recommendations for Expo Future (attached) in February of 2023, including Objectives 1 and 2 above, staff have built a broad-based coalition of individuals and organizations that are committed to achieving the vision of Expo Future and guiding Phase 2 of the project. This public-private coalition includes representatives of City of Portland, Multnomah County, Confederated Tribes of Siletz Indians, the urban Indigenous community, the Japanese American community, the Vanport community, sports facilities, professional sports teams, amateur sports teams and tournament organizers, economic development organizations, tourism and hospitality professionals, the philanthropic community, Expo clients, historians, private developers, Expo neighbors, and more.

Members of this coalition are organized into three committees, each of which fulfills a distinct and meaningful purpose. The 14-member Historical Significance & Memorialization Committee is working to achieve Objective 1. The 14-member Sport & Facility Committee is working to achieve Objective 2. The 28-member Executive Advisory Committee serves to guide the overall project and to connect project staff to relevant project resources. Each committee began its work in September 2023, and committees meet quarterly or monthly. Members' collective lived experience, knowledge, and ties throughout the region ensure that Expo Future will be an asset to the entire region. (See attached governance structure diagram.)

The Historical Significance & Memorialization Committee (HSMC) is working to develop a vision of how to memorialize the history and culture of the Expo Center site, including the stories of the Tribes and urban Indigenous, Japanese American, and Vanport residents who were most impacted by Expo over time. Council will have the opportunity to hear directly from the HSMC during the March 12, 2024 work session. HSMC's work to date has resulted in:

- Strong collaborative relationships within the committee;
- Development of an initial community engagement plan and timeline;
- Planning a one-day storytelling event that informs Expo Future committee members and Metro leaders about the site's history and impact; and
- Identification of preliminary ideas of how to memorialize the historical significance of the Expo Center site. These preliminary ideas include tangible and intangible memorialization such as a feeling of healing, connection to nature and the river, announcements during events, an honest representation of the site's history, gathering places, native plantings, a walking path that conveys the site's history, featuring culturally-relevant foods, multi-media exhibits in multiple languages, online resources offered at the site, history of sport/recreation at the site, naming of buildings and areas, an annual storytelling or history event, and more.

The Sport & Facility Committee is helping Metro to develop the overall strategy for pivoting Expo Center to a sports-focused facility. Council will have the opportunity to hear directly from the committee during the March 12, 2024 work session. The committee's work to date has resulted in:

- Strong collaborative relationships within the committee;
- Identification of other facilities in the U.S. that can serve as models for Expo's redevelopment;
- Provision of data, local knowledge of the region's sport and recreational assets and needs, and expertise that informs and guides the Expo Future sports feasibility study, which will conclude in May 2024;

- Identified publicly- or privately-owned sports facilities for the sports feasibility consultant (Hunden Partners) to profile and for potential future site visits by staff and partners; and
- Discussion of and eventual guidance about how to balance sports tourism and generating regional economic impact with opportunities for residents' regular and predictable access and use at Expo Future.

In addition to Expo Future's three external governance committees, an internal Steering Committee and Project Team advise project staff on day-to-day matters. These teams are comprised of Metro staff and meet monthly and biweekly, respectively. With their support and guidance, the project has, among other things:

- Successfully completed procurement and contracting for the Expo Future sports feasibility study and community engagement contracts totaling approximately \$272,000;
- Ensured that Tribal Governments are aware of and engaged in the project;
- Launched the Expo Future Funding Task Force to identify funding/financing strategies for the project;
- Developed a monthly newsletter that reaches nearly 1,000 individuals and averages 45% to 50% open rates;
- Provided guidance and representation related to Interstate Bridge Replacement plans and impacts on the Expo site;
- Advised staff about project communication strategies;
- Advised staff about how to respond to Trimet's requests of Metro at the Expo Center, including restoration of the *Voices of Remembrance* "torii gates" art installation, bus routes at Expo to replace late-night yellow line MAX service to Expo Station, and a request to site a MAX overnight facility and operational and staff support functions at Expo Center;
- Provided staff with an understanding of Metro's Employment Area designation and its potential effects on the project;
- Encouraged the development of a nearly-final Expo Future-related sponsorship fund aligned with Metro's broader sponsorship program; and
- Studied The Podium sports facility in Spokane, the Spokane Public Facilities District's (SPFD) operational model, and SPFD's relationship with Spokane Sports (Spokane's nonprofit sports tourism promotion arm) – all of which perform successfully.

ACTION REQUESTED

- Continued project awareness and support during Phase 2 of the Expo Future project
- Insight about other information or data Council would like to receive before its June 2024 joint meeting with MERC to review the Expo Future sports feasibility study findings and affirm Council and MERC's direction to pivot Expo to a community-centric destination venue that prioritizes amateur, professional, and recreational sports.

IDENTIFIED POLICY OUTCOMES

Metro Council has directed staff to find the highest and best public use of Expo and to ensure its long-term financial sustainability. In February 2023, Council and MERC unanimously approved two objectives for Phase 2 of the Expo Future project: meaningful memorialization of the site's history and culture, and pivoting Expo to a sports-centric venue. Project goals for Phase 2 include the following, and work is underway in each of these three areas.

- Work with the communities most impacted by the site to develop a set of recommendations and priorities for Metro’s COO on how Expo’s future redevelopment should honor the historical and cultural legacy of the site.
- Complete a market and financial feasibility study and other due diligence activities that will help inform Expo’s future sports redevelopment priority and focus. This study will recommend other revenue streams and complementary site uses that will maximize revenue potential for the site and increase overall economic impact of Expo (e.g., anchor tenants, complementary developments such as lodging, restaurant, retail, or other amenities).
- Complete broader community and Tribal Government engagement and additional due diligence activities (operator analysis, funding analysis, site concept visioning, etc.) that will result in the integration of both project objectives into one or more cohesive site redevelopment and funding plan option(s) that Metro’s COO recommends to Metro Council and MERC.

The resulting vision for Expo Future will align with the project’s Guiding Principles (see attached), which were adopted by resolution of Metro Council and MERC in the spring of 2022.

POLICY QUESTION(S)

- Does Metro Council have any feedback or guidance for the project at this time?
- Does Metro Council have any specific information or data needs before the joint Council/MERC meeting presently scheduled for June 4 or 5, 2024?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

Metro Council and MERC have requested periodic updates on the status of Phase 2 of the Expo Future Project. During this meeting, staff and two governance committee representatives will share an update on work completed to date and remaining actions to be completed in Phase 2 of the project. Updates will discuss overall progress, key activities of the Historical Significance & Memorialization Committee and the Sport & Facility Committee, and significant milestones planned through the end of Phase 2 (December 2024).

While specific policy direction is not requested, Metro Council’s feedback and guidance on any of the information presented is welcome.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

This project supports the **Council’s fall 2019 direction to find the highest and best public use and long-term financial sustainability of Expo**. After completion of the Expo Center Development Opportunities Study in 2021, MERC and Council directed staff deprioritize sale of the property and to pursue creative ideas for the property’s use. Following a Request for Expressions of Interest in 2022 and evaluation of eight submittals, Metro Council and MERC issued unanimous support for the COO’s recommendations for the future of Expo in February 2023, marking the conclusion of Phase 1 of the Expo Future project. Early in Phase 2 of the project, Metro Council and MERC affirmed the project governance structure and the COO’s recommended next steps in July of 2023.

Since the July 2023 update, staff have engaged multiple partner organizations and individuals from Tribes, the urban Indigenous and Japanese American communities, and Vanport survivors and descendants in committees organized to achieve Objectives 1 and 2. The Historical Significance & Memorialization, Sport & Facility, and Executive Advisory Committees are engaged in their respective areas of work. Robust community engagement is underway and will continue through summer of 2024.

Start Consulting, a local COBID business, is planning and conducting the engagement process, which will gather input and opinions from Tribal Governments and communities that would be most directly impacted by memorialization activities and a sports pivot. Hunden Partners, a nationally recognized destination real estate advisor, is assessing the feasibility of more intensive sports uses at Expo Center and will be recommending changes to the facility, companion amenities, and funding mechanisms that will support more sports-intensive uses. An Expo Future Funding Task Force is beginning to consider possible funding and financing mechanisms for the project.

Activities in Phase 2 advance the following goals of Metro's *Strategic Plan to Advance Racial Equity, Diversity and Inclusion*:

- A, convening and supporting regional partners to advance racial equity;
- B, meaningfully engaging communities of color; and
- D, creating safe and welcoming services, programs, and destinations.

If or as the project evolves to include construction, business development, and job creation, it also has the potential to meet Goals C and E of the plan:

- C, a racially diverse workforce, and
- E, resource allocation that advances racial equity.

At the conclusion of community engagement work and the sports feasibility study, staff will have the information needed to inform Metro Council and MERC about the anticipated effects of recommended memorialization strategies and activities and a pivot to sports-centric uses at Expo. Financial implications – both direct and indirect economic benefit of Expo Future and the costs of realizing recommended memorialization and sport pivot activities – will also be identified and available for Council and MERC's consideration.

Staff expects to present a vision plan to Metro Council and MERC of the resulting Expo Future recommendations in December of 2024.

BACKGROUND

Metro owns the Portland Expo Center ("Expo") site – a well-positioned, 53-acre employment and exhibition site at the economic center of the Portland metro region. Under the current business model, the long-term prospects of Expo are challenging due to the large-scale capital needs of Halls A, B, and C and the ongoing routine maintenance of the newer buildings and campus infrastructure. Pre-pandemic, Expo generated approximately \$50M in annual economic impact through 100+ public trade shows and community events.

The site is the largest exhibition space in Oregon, boasting 333,000 square feet of existing building area and over a million square feet of paved parking lot. Halls A, B, and C have been in operation for more than 100 years. Halls D and E are 23 and 27 years old, respectively. Expo is adjacent to other popular

sports assets such as Portland International Raceway and Delta Park, a multi-field outdoor sports complex owned by the City of Portland that hosts various youth and adult sports tournaments throughout the year.

Metro recognizes the site’s pre-colonial history and importance to Indigenous Peoples. This land was previously part of a dynamic and complex network of wetlands and river channels supporting Indigenous people and their ways of life since time immemorial. In addition, given Expo’s hundred-year operational history, many communities and partners in the greater Portland region have unique and important historical and cultural ties to the venue and surrounding area.

Specifically, the nearby Vanport Floods and World War II Internment at the Portland Assembly Center have had lasting impacts on the Black, Indigenous and Japanese American communities. Metro recognizes the past events and injustices that took place on or near the Expo property. Expo staff works with Vanport Mosaic and the Japanese Museum of Oregon to ensure these occurrences are never forgotten.

Throughout the process, Metro has and will continue to engage key stakeholders and partners, including communities with historic and cultural ties and business interests. These include the Black, urban Indigenous and Japanese American communities, several Tribes, and Expo clients and business stakeholders to define Expo Future and refine the project Guiding Principles. The outcome of this stakeholder and partner engagement was the development of the Guiding Principles which were adopted by resolution by MERC and Metro Council in April and May of 2022.

The following table outlines the history and relevant actions of this project.

2000	Metro Council Resolution 00-3019 supports submission of a Conditional Use Master Plan to City of Portland. General components include site development plans, transportation and parking, mitigation of Expo development impacts, environmental compatibility, development review, neighborhood communication and coordination, project review procedures for future development, public involvement. Major elements of the Master Plan include replacement and expansion of exhibit halls A, B and C to match the look of Hall E and Hall D (under construction at the time). CUMP is submitted and approved in 2001.
2003	MERC completes study “Expo: A Vision for the Future” with Yost, Grube Hall architects, to replace the outdated facilities of Halls A B C, and East and West Halls with 255,000 square feet of new facilities, including an exhibit hall, meeting rooms, support facilities, landscaping and related improvements to augment Halls D and E.
2011	MERC submitted Expo Center Conditional Use Master Plan, prepared by Shiels Obletz Johnson, SERA and subcontractors to City of Portland for expansion and replacement of existing exhibition facilities –Halls A, B, and C—with a new exhibition hall similar to Hall D and E, as well as 11 other site developments.
2014	Metro commissioned Hunden Partners to provide an independent assessment of Expo governance and operations, a local competitive market analysis, and the possible impact of a new local headquarters hotel. The scope of work also included an analysis of the existing physical conditions.
2016 - 2019	From 2016 to 2019, a range of options to increase and diversify revenue streams was studied, including long-term tenancies and flexible outdoor space.

Fall 2019	At the direction of Metro Council, the Portland Expo Center Development Opportunity Study (DOS) was launched in 2019 to seek opportunities for highest best use of the site that brought about long-term financial sustainability . The study's purpose was to identify development options that could complement, support, or replace the current operations at Expo and assess its current value.
2020-2021	Metro engages with the communities and stakeholders most impacted by the site through meetings and listening sessions, and a draft set of community-driven Guiding Principles is formed.
Spring 2021	The DOS report is published, outlining nine different scenarios (from logistics to film studios) the site could accommodate. MERC and Metro Council deprioritize the "sell option" and direct staff to create a solicitation process to seek creative ideas and public/private development partners for the site.
Spring 2022	MERC and Metro Council adopt the community-driven Guiding Principles developed during the DOS by resolution as part of their framework for decision-making.
Summer, fall 2022	The Request for Expressions of Interest (RFEI) phase of the Expo Future Project is launched. Metro receives eight submittals in response to the RFEI process.
Winter 2023	Metro engaged community members, Tribal and other government partners, and staff in the evaluation of RFEI submissions, culminating in the Phase 01: Expo Future RFEI process and findings report.
Spring, summer 2023	Metro Council and MERC unanimously supported the COO's recommendations for the future of Expo and Phase 2 of the Expo Future project began. In summer 2023, Metro Council and MERC endorse the proposed project governance structure and COO's recommended next steps for the project.

ATTACHMENTS

- A. Project Guiding Principles
- B. COO Recommendations from Feb 28, 2023 Council/MERC meeting
- C. Phase 2 Governance Committee Structure diagram
- D. Expo Future Governance committee roster
- E. Start Consulting's engagement plan
- F. Hunden Partners' sports feasibility excerpts: market conditions, sports and sports tourism trends, facility supply and demand, industry trends, stakeholder interviews

- Is legislation required for Council action? Yes No
- If yes, is draft legislation attached? Yes No
- What other materials are you presenting today?
 - a) PowerPoint presentation
 - b) Progress report on Expo Future Objectives 1 through 6

Attachment A

What guiding principles should be at the root of how we weigh different development options?

PORTLAND EXPO FUTURE SCENARIO GUIDING PRINCIPLES

Updated December 10, 2021





Metro Chief Operating Officer's Expo Future Project recommended next steps

Based on the findings of the Phase 01: Expo Future Project RFEI report, Metro's COO is recommending range of actions to pursue as part of Phase 02 of the Expo Future project.

Recommendation # 1: Metro will recognize Expo Center's Hall A as a site of national historic significance and meaningfully memorialize the site's history of forced displacement during World War II and the Vanport Floods, as well as the site's pre-colonial history and importance to Indigenous Peoples.

In doing so, Metro will take the lead in convening Tribal government partners, the Black and Japanese American communities and urban Indigenous community to meaningfully memorialize the cultural significance of the site to our region and country. As part of this, Metro shall investigate support from federal, state, or other partners, including philanthropic partners, for financial or other opportunities for Hall A, specifically, and the land adjacent to the Columbia River.

Recommendation # 2: Recognizing Oregon's status as an international powerhouse in the sport and outdoor industry, Metro will take measures to align Expo's future redevelopment as a community-centric destination venue that prioritizes amateur, professional, and recreational sports. Metro will proceed to Phase 02 of the Expo Future project and directs staff to conduct due diligence, which includes –

- Partnering with Sport Oregon and other sports organizations on a market and feasibility study to examine how Expo can best pivot its operations toward a sports facility as a primary market, with other uses such as consumer, live entertainment, and community events as secondary markets.
- Conduct an analysis of the benefits and drawbacks of contracting with a third-party venue operator versus Metro.
- Explore additional revenue generating opportunities for the site.

Depending upon results of the market and feasibility study:

- Work with community partners and stakeholders to align Metro's new vision for the site as a community-centric venue with the project's Guiding Principles.
- Conduct a full capital needs assessment and determine a strategy for the site's future development.
- Develop a funding strategy and business plan to support the approved vision.
- Coordinate with other jurisdictions on activities related to the Expo Future project and identify potential public and private partnership opportunities.
- Conduct additional due diligence activities that support the core central concept's feasibility.

Recommendation # 3: COO's office will work with Metro Council President and the Chair of MERC to determine the appropriate governance structure and stakeholders to support the activities of Phase 02.

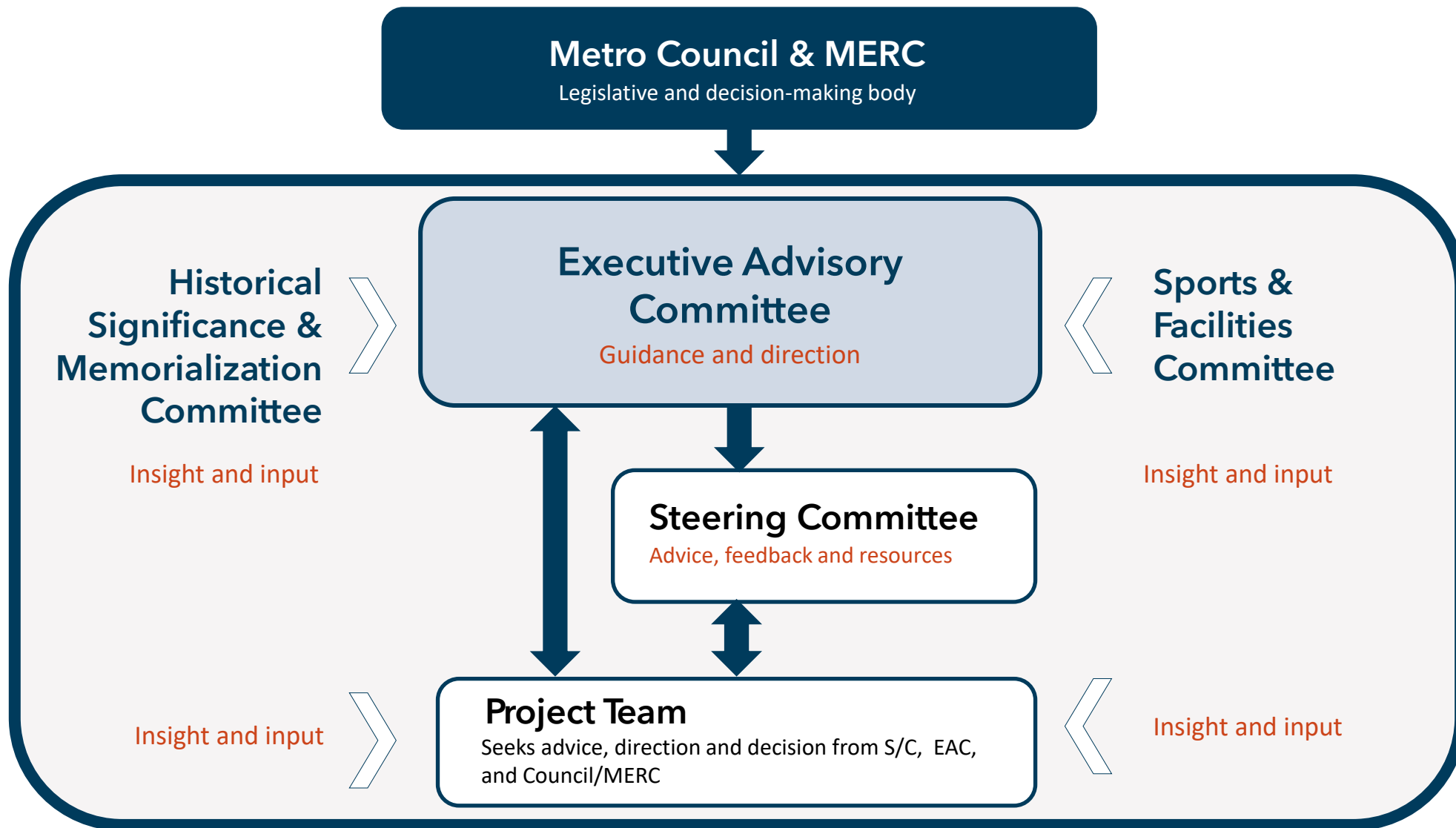
Recommendation # 4: In alignment with the recommendations from the Expo Future Community Partner review committee and the project Steering Committee, Metro shall prioritize the use of locally-owned contractors and vendors for the redevelopment of the site.

Recommendation # 5: Expo will continue to operate and book events after June 2024. Booking contracts should propose clear cancellation policies and flexibility to accommodate for redevelopment efforts. Upon identification of a capital improvements timeline, bookings and activities should be adjusted for consistency with redevelopment or other unforeseen impacts.

Where possible, Metro's Visitor Venues General Manager shall align Expo operations with a booking policy and communications strategy that supports the Expo Future Project's timeline and goals. In addition, every effort should be made to pursue the sports event market within the current venue constraints.

Recommendation #6: COO's Office shall continue to coordinate with Planning and Development staff working on the Interstate Bridge Replacement (IBR) Program, to identify project needs and ensure coordination between Expo booking and IBR project.

PHASE 2: PROJECT GOVERNANCE



Attachment D

EXPO FUTURE PROJECT

Governance Committee Members

(Confirmed of 2/27/24)



EXECUTIVE ADVISORY

CO-CHAIRS

Lynn Peterson, Metro Council President
Alternate: Christine Lewis, Metro Council Vice President

Karis Stoudamire-Phillips, MERC Chair
Alternate: Damien Hall, MERC Vice Chair

MEMBERS

Jesse Beason, Multnomah County Commissioner, District 2
Felicita Montebianco, Director, Tualatin Hills Park & Recreation District

Greg Johnson, Program Administrator, Interstate Bridge Replacement Project

Andrew Fitzpatrick, Director of Economic Development, City of Portland

Lynn Fuchigami-Parks, Historical Significance Committee Co-chair

Ed Washington, Historical Significance Committee Co-chair

Elizabeth Edwards, Interim Executive Director, Community Health & External Affairs, Kaiser Permanente

Carrie Hoops, Executive Director, Miller Foundation

Terrance Moses, Kenton Neighborhood Association

Kerry Tymchuk, Executive Director, Oregon Historical Society

Hanako Wakatsuki-Chong, Executive Director, Japanese American Museum of Oregon

Renee King, Sport & Facility Committee Co-chair

Megan Conway, Sport & Facility Committee Co-chair

James Jessie, Sport & Facility Committee Co-chair

Heather Davis, CEO, Portland Timbers

Jim Etzel, CEO, Sport Oregon

Gary Hollands, Interim Executive Director, Albina Sports Vision

John Johnson, Athletics Director, Portland State University Athletics

Natalie King, Senior Vice President of Communications and Public Affairs, Portland Trail Blazers

Scott Leykam, Vice President for Athletics, University of Portland

Peter Weber, Executive Director, Oregon Schools Activities Association

KL Wombacher, President and General Manager, Hillsboro Hops

Jason Brandt, President & CEO, Oregon Restaurant and Lodging Association

Monique Claiborne, President & CEO, Greater Portland Inc.

Andrew Hoan, President & CEO, Portland Metro Chamber

Alternate: John Isaacs, Executive Vice President of Public Affairs

Jeff Miller, President & CEO, Travel Portland

HISTORICAL SIGNIFICANCE & MEMORIALIZATION

CO-CHAIRS

Lynn Fuchigami-Parks, Japanese American Community Leader

Ed Washington, Professor Emeritus, Portland State University

MEMBERS

Ashton Simpson, Metro Councilor

Deanna Palm, MERC Commissioner

SandeBea Allman, Chief Community Engagement and Development Officer, NARA NW

Akiko Imamura Betcher, Program Manager, Community and Social Health, Kaiser Permanente

Eliza Canty Jones, Chief Program Officer, Oregon Historical Society

Laura Lo Forti, Story Midwife, Vanport Mosaic

John Kodachi, Attorney, Japanese American Community Leader

Kim Moreland, Board President, Oregon Black Pioneers

Katen Patel, President, K10 Hotels LLC

Matthew Rotchford, Executive Director, Portland Expo Center

Hanako Wakatsuki-Chong, Executive Director, Japanese American Museum of Oregon (JAMO)

Peter Hatch, History and Archeology Specialist, Confederated Tribes of Siletz Indians

Governance Committee Members

(Confirmed of 12/11/23)



SPORT & FACILITY

CO-CHAIRS

Renee King, Government and Public Affairs, Providence Health
James Jessie, Chief Sales Officer, Travel Portland
Megan Conway, Chief Strategy Officer, Travel Portland

MEMBERS

Christine Lewis, Metro Council Vice President
David Penilton, MERC Commissioner
Jen Anderson, Vice President of People & Culture, Hillsboro Hops
Alicia Crawford Loos, Sales & Marketing Manager, Portland Expo Center
Brett Horner, Planning Manager, Portland Parks & Recreation

Karina LeBlanc, General Manager and President, Thorns FC
Cody March, Executive Director, Columbia Empire Volleyball Association (CEVA)
Berk Nelson, Manager of Events and Film Office, Prosper Portland
Matt Reed, COO, Sport Oregon
Alternate: Nathan Nayman, External Affairs & Strategy Specialist
AJ Zahn, Senior Vice President of Operations, Rose Quarter
Mike Johnston, President, General Manager/Coach, Portland Winterhawks

STEERING COMMITTEE

(Members are Metro Staff)

EXECUTIVE SPONSOR

Marissa Madrigal, COO

MEMBERS

Kristin Dennis, Metro Council Chief of Staff
Steve Faulstick, General Manager of Visitor Venues
Brian Kennedy, CFO
Katie McDonald, Tribal Liaison

Sebrina Owens-Wilson, Director, Diversity, Equity and Inclusion
Andrew Scott, Deputy COO
Nathan Sykes, Deputy Metro Attorney
Craig Stroud, Executive Director, Oregon Convention Center
Lia Waiwaiole, Director of Communications

PROJECT TEAM

(Members are Metro Staff)

PROJECT SPONSOR

Paul Slyman, General Manager of Major Projects

CORE TEAM

Stephanie Redman, Project Manager
Jovian Davis, Project Administrator
Jaime Mathis, Strategic Communications
Amy Nelson, Project Administrator

MEMBERS

Jon Deveaux, Procurement Analyst
Josh Harwood, Policy Advisor, Finance & Regulatory Services
Katie McDonald, Tribal Liaison
Matthew Rotchford, Executive Director, Portland Expo Center
Alternate: Chuck Dills, Operations Manager, Portland Expo Center
Gary Shepherd, Senior Attorney
Robyn Stowers, Policy Advisor, Councilor Nolan


Attachment E

Metro Expo Center – Historical Significance and Memorialization Engagement Plan

Phase 1 – Engagement and Communications Planning

- A. Information Gathering (February)
 - a. Data and Information Gathering from HSM Committee, staff, and other participants.
 - b. Desktop Research – team conducts research on additional community-based organizations, groups, or individuals who may have been impacted by the Expo Center in any way.
 - c. Identify and solidify list of participants for engagement.
 - d. Recruitment Plan with HSMC as needed.
- B. Indigenous Representation and Engagement (early February)
 - a. Connect with Indigenous Community Members who have been part of project.
 - i. Katie McDonald, Metro Tribal Affairs Advisor
 - ii. Shiloh George, Consultant
 - iii. Peter Hatch, Confederated Tribes of the Siletz Indians
 - iv. SandeBea Allman, Chief Community Engagement and Development Officer, NARA NW
- C. Communications Planning (February)
 - a. Public Messaging – Coordinate with Metro Communications staff on public messaging to share broadly that Expo is working on Historical Memorialization and to recruit additional participants who have been impacted by the Expo Center and surrounding area.
 - b. Messaging templates and language to internal engagement participants
 - c. Meet with Metro
 - d. Meet with Metro Communications Team to embed Metro community engagement principles.
 - i. Lia Waiwaiole, Metro Communications Director
 - ii. Gloria Pinzon Marin, Metro Public Affairs Specialist (developing community engagement guidelines)
 - iii. Kimberlee Ables, Metro Strategic Communications & Crisis Manager
- D. Engagement Structure (February-March)
 - a. Internal Engagement – Develop interview questions, interview rubric, and other feedback formats such as charettes/group discussions.
 - b. External Engagement – Develop discussion questions, surveys, and other formats such as charettes/workshops.
- E. Power Dynamic (March)
 - a. Clarify what power/influence internal participants have.
 - b. Clarify what power/influence external participants have.
 - c. Communications plan on next steps beyond engagement and how participants can remain engaged.
 - d. See Figure 1.
 - i. Internal participants - *Involve*, *Collaborate*, and limited parts of *Empower*.
 - ii. External participants – *Involve* and limited parts of *Empower*.



INCREASING IMPACT ON THE DECISION 					
	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Figure 1: IAP2 Spectrum of Public Participation

Phase 2 – Engagement

Internal Engagement

A. Interviews (February-early March)

a. Metro

i. Leadership

1. Marissa Madrigal, Metro Chief Operating Officer
2. Paul Slyman, executive sponsor, Metro GM of Major Projects

ii. Expo Team (group discussion, Amy Nelson can help with scheduling)

1. Steve Faulstick, GM of Visitor Venues (OR Convention Center, Expo Center, P'5 Centers for the Arts)
2. Matthew Rotchford, Expo Executive Director
3. Alicia Crawford Loos, Expo Sales & Marketing Manager
4. Chuck Dills, Expo Facility Manager

b. Committee Leadership

i. HSMC Chairs

1. Lynn Fuchigami Parks, Executive Director Emeritus, Japanese American Museum of Oregon
2. Ed Washington, PSU Community Liaison for Diversity Initiatives, former Metro Councilor

ii. (Optional) Sport & Facility Committee Cochairs:

1. Megan Conway, Chief Strategy Officer, Travel Portland
2. James Jessie, Chief Sales Officer, Travel Portland
3. Renee King, Government Relations, Providence Health

c. Key Committee Members

- i. Laura Lo Forti, Vanport Story Midwife; HSMC
- ii. Peter Hatch, Confederated Tribes of the Siletz Indians

- iii. Hanako Wakatsuki-Chong, JAMO
- d. Subject Matter Experts
 - i. Eliza Canty Jones, HSMC and Oregon Historical Society
 - ii. Amy Peterson, JAMO
- e. Additional Interviews as recommended by HSMC.
- B. Internal Small Group Discussions and Charettes (April-September)
 - a. During Committee Meetings
 - b. Additional Events and Discussions
 - c. Surveys

External Engagement

- A. Impacted Communities (May-August)
 - a. External Engagement – Develop discussion questions, surveys, and other formats such as charettes/workshops.
 - i. Discussion Questions
 - ii. Survey questions and formats
 - 1. Survey distribution plan.
 - iii. Charette/Workshop outlines
 - 1. 3-5 Events
 - a. Japanese American Participants
 - b. Indigenous Participants
 - c. Vanport Impacted Black Participants
 - d. All Impacted Vanport Residents
 - e. Other impacted groups/General Discussion
 - 2. Outline of event details (food, stipends, location, etc.)
 - iv. Open House Forum
 - 1. Potentially with story sharing component
 - 2. Outline of event details (food, stipends, location, etc.)
 - v. Individual interviews with select impacted community members as recommended by HSMC and other groups.
 - vi. Tabling at impacted community events such Vanport Mosaic Festival.
- B. Expo Users and Key Groups (March-April)
 - a. Metro Exposition Recreation Commission
 - b. Recurring Trade Show Clients
 - c. One-time and Potential Clients

Phase 3 – Data and Reporting (August-October)

- A. Survey Summaries
- B. Engagement Summaries by Participant Type
- C. High-level feedback summary reports
- D. Detailed engagement notes tracked by consulting team and anonymized if provided upon request.



**Excerpts and
topline findings**

Expo Future Project Feasibility Study

Market Findings – Tasks 2 & 3

DRAFT

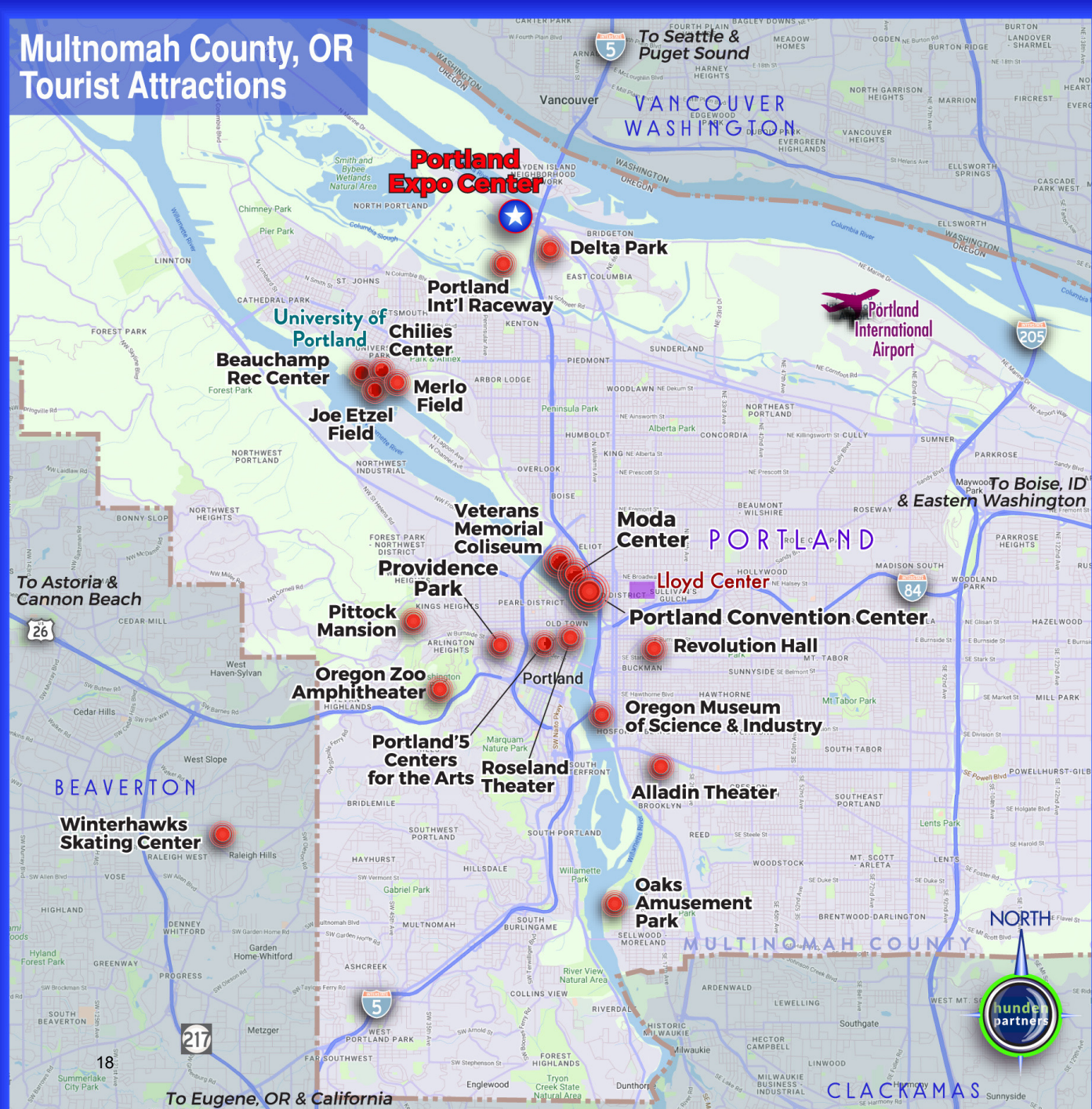
DECEMBER 8, 2023



Sports & Entertainment Attractions

The map to the right shows the location of Multnomah County's sports and entertainment attractions. These are mostly centralized in Portland, with the area's top performing attraction, Providence Park, located in Downtown Portland. These 20 attractions are analyzed in further detail in the following slides related to visitor trend data.

Multnomah County, OR Tourist Attractions



Topline market findings

- 11.3M people can access Portland within a five-hour drive time
- Portland's above-average median household income includes surplus disposable income, suggesting opportunities for spending on local sports and entertainment.
- The Portland MSA has an estimated 7,704 sports-related jobs across professional/semiprofessional teams, recreational sports teams and camps, and sports and recreation instruction. Earnings per job ranging from \$27,498 to \$285,857.
- 7 of 10 of Multnomah County's most-visited attractions are primarily sports-related. Portland Expo Center ranks 7th in visitation.

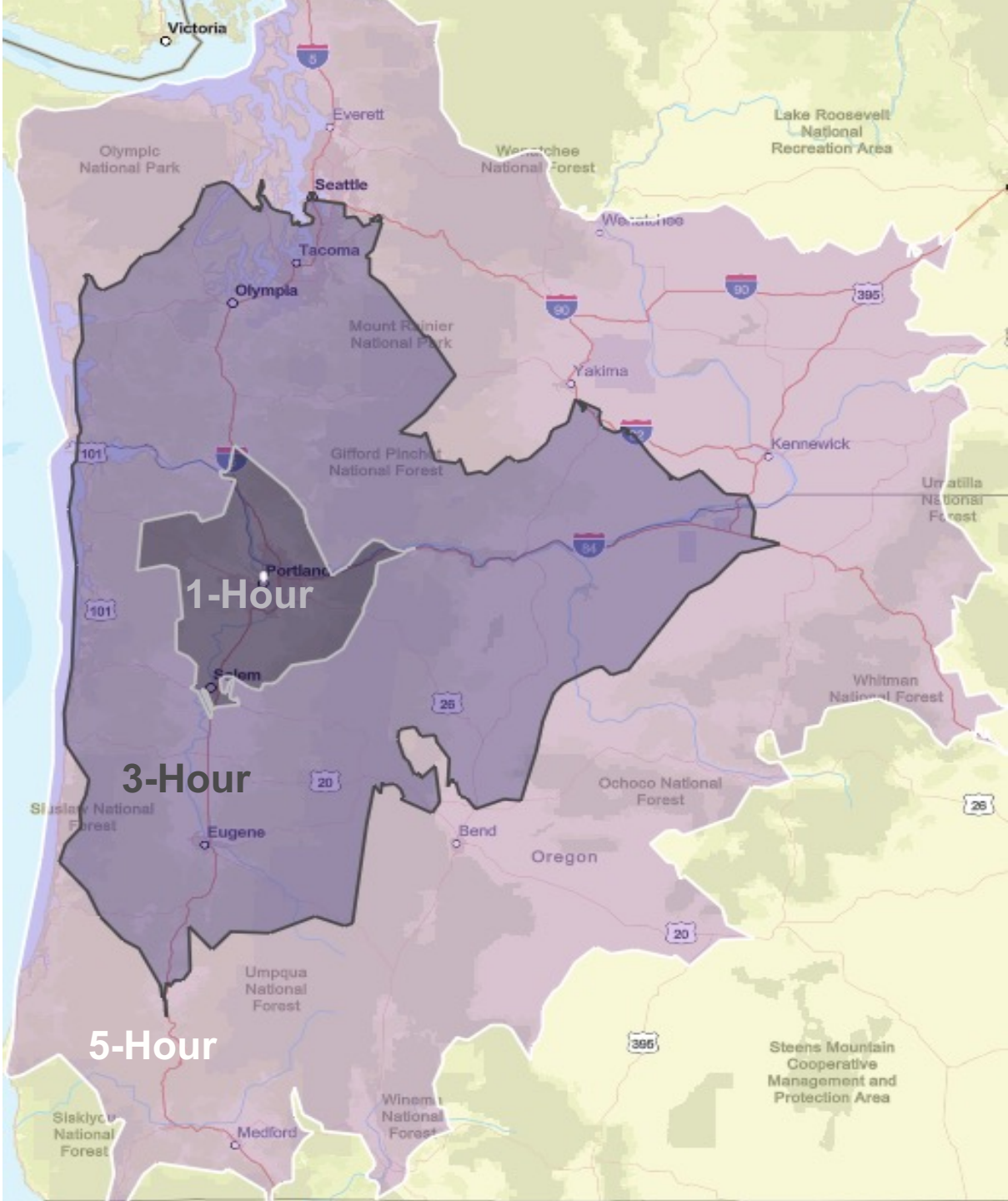
Regional Drive Times

The population within a one-hour drive time of Portland is nearly three million people. This population expands to more than 6.7 million within a three-hour drive time and surpasses 11.3 million within five hours, including the Seattle MSA.

Portland's strategic location provides access to other large markets, including Seattle, WA and Vancouver, BC. The drivable tourism market presents significant opportunity for Portland to attract visitors.

Estimated Drive-Time Statistics from Portland, OR (2023)			
	1-Hour	3-Hour	5-Hour
Population (2023)	2,918,198	6,774,598	11,344,653
Estimated Population (2028)	2,986,077	6,928,974	11,633,245
Estimated Growth (2023-2028)	2.3%	2.3%	2.5%
Households (2023)	1,132,093	2,600,931	4,426,525
Estimated Households (2028)	1,166,578	2,675,265	4,567,820
Estimated Growth (2023-2028)	3.0%	2.9%	3.2%
Median Household Income	\$85,435	\$82,859	\$85,364
Median Home Value	\$507,771	\$480,987	\$501,386
Median Age	38.7	39.3	39.6
Average Annual Spend on Entertainment/Recreation	\$4,165	\$4,078	\$4,334

Source: ESRI



Income & Spending

Hunden analyzed income and spending data, which suggests that Portland stands out with the highest median household income, averaging \$78,476 from 2017 to 2021. In comparison, the national average was nearly \$10,000 lower, at \$69,021 during the same period. This disparity of nearly 14 percent highlights Portland’s strong economic standing.

With a higher median household income than the national average, the city experiences a surplus of disposable income, suggesting opportunities for spending on sports and entertainment within the local market.

Category	United States	Oregon	Multnomah County	Portland
Homeownership rate, 2017-2021	64.6%	63.2%	54.7%	53.4%
Median value of owner-occupied housing units, 2017-21	\$244,900	\$362,200	\$437,600	\$462,800
Persons per household, 2017-21	2.60	2.49	2.34	2.26
Median household income, 2017-21	\$69,021	\$70,084	\$76,290	\$78,476
Persons below poverty level, percent	11.6%	12.1%	12.4%	12.6%

Source: U.S. Census Bureau

Sports & Entertainment Attractions

Ranked by Total Visits

Hunden utilized Placer.ai geofencing data to understand visitor trends from sports and entertainment attractions in Multnomah County. The adjacent table highlights Multnomah County's most visited attractions in 2022 ranked by total visits.

There are a variety of attractions in Multnomah County. The top attractions are primarily sports-related facilities that rank in the top 10 among all assets. Providence Park reported the highest visitation with nearly 1.2 million visitors and 420,006 unique visitors. Total visits drop gradually with the remaining top 10 assets. Seven of the top 10 assets are sports-related, indicating a robust sports tourism market and demand for these types of facilities.

The color coding for the top 10 visited assets will remain highlighted in the following slides.

Total Visits Rank	Attraction Name	Attraction Type	2022 Visits	2022 Visitors	Avg. Visits Per Customer	Percentage from Within Multnomah County	Percentage from Outside Multnomah County	Percentage from the Remainder of OR	Percentage from Out-of-State
1	Providence Park	Stadium	1,196,928	429,006	2.79	47.4%	52.6%	36.2%	16.4%
2	Moda Center	Arena	1,131,825	726,220	1.56	26.2%	73.8%	48.3%	25.5%
3	Oaks Amusement Park	Amusement Park	998,828	539,907	1.85	45.0%	55.0%	38.4%	16.5%
4	Oregon Convention Center	Convention Center	796,923	435,477	1.83	20.8%	79.2%	39.6%	39.6%
5	Delta Park	Sports Complex	736,619	207,153	3.56	43.6%	56.4%	30.7%	25.7%
6	Oregon Museum of Science and Industry	Museum	559,241	440,347	1.27	29.6%	70.4%	39.2%	31.2%
7	Veterans Memorial Coliseum	Arena	444,231	291,711	1.52	27.0%	73.0%	48.2%	24.9%
8	Portland Expo Center	Exposition Center	424,204	284,566	1.49	20.4%	79.6%	49.8%	29.8%
9	Winterhawks Skating Center	Arena	356,609	90,557	3.94	32.0%	68.0%	59.1%	8.8%
10	Portland International Raceway	Racetrack	342,749	151,475	2.26	19.1%	80.9%	38.8%	42.2%
11	Chiles Center	Arena	331,649	124,990	2.65	38.6%	61.4%	25.8%	35.6%
12	Roseland Theater	Theater	304,581	251,750	1.21	35.1%	64.9%	37.4%	27.6%
13	Beauchamp Rec Center	Recreation Center	285,535	21,032	13.58	64.2%	35.8%	6.0%	29.8%
14	Revolution Hall	Music Venue	124,727	89,890	1.39	51.0%	49.0%	28.9%	20.1%
15	Merlo Field	Soccer Field	84,215	25,833	3.26	47.2%	52.8%	14.7%	38.1%
16	Portland 5 Centers for the Arts	Theater	66,861	47,357	1.41	47.5%	52.5%	34.4%	18.1%
17	Joe Etzel Field	Baseball Field	65,330	26,536	2.46	34.9%	65.1%	28.0%	37.1%
18	Aladdin Theatre	Theater	61,298	42,251	1.45	51.7%	48.3%	31.5%	16.8%
19	Pittock Mansion	Museum	55,150	53,734	1.03	18.8%	81.2%	27.6%	53.6%
20	Oregon Zoo Amphitheater	Amphitheater	54,625	48,650	1.12	19.5%	80.5%	49.9%	30.6%
Total / Average			8,422,128	4,328,443	1.95	36%	64%	36%	28%

Source: Placer.ai

*Excludes golf courses, parks, markets, and gardens

Topline findings: U.S. sports participation

- Sports participation in the U.S. increased annually from 2017 to 2022, except for individual sports and winter sports.
- Participation in outdoor sports, fitness, racquet, water, and team sports increased from 2017 to 2022..
- Highest rates of team sports participation include basketball, soccer, and football, followed by indoor/outdoor volleyball.

Topline findings: U.S. sports tourism trends

- The sports tourism industry declined 53% in 2020 during the COVID-19 pandemic.
- By 2021, the industry returned to 88% of 2019 spending levels.
- In 2021, sports tourism-related spending totaled \$39.7B.
- Established sports tourism markets can generate \$600 more per day in average family spending than a market with no significant tourism and \$282 more per day than an active tourism market that does not include youth/amateur sports tourism.

Sports & Event Venue Trends

Multi-Purpose Venues



Multi-purpose venues are becoming increasingly popular as they allow for a diverse range of revenue streams and event capabilities due to year-round activation. As a result, layouts that support a multi-purpose venue have dominated the market in recent years.

Flexible Flooring/Seating



Designing a facility that is compatible for multiple sports can reduce negative impacts on a facility's profitability. Forms of bleacher seating and portable flooring can be convertible in more efficient and rapid manners to enhance how multi-faceted a facility can be with the sports and activities they plan to offer.

Venue Flexibility



As venues push to accommodate a variety of events, venue flexibility continues to become more crucial. Some design trends include stage-end scoreboards for a more inclusive viewing experience, retractable roofing, and ancillary seating that allows for future expansion. Additional multi-functional spaces are often included to cater to meetings and private event business.

Multi-Use Entertainment Districts



To attract crowds before and after events, venues are being strategically designed to compliment restaurant/retail and entertainment both within the venue and its surrounding area, as well as nearby accommodations through hotel and residential development. Maximizing foot traffic is important for successful sports-anchored districts, which is why dense entertainment districts surrounding venues are on the rise to make venues more attractive to promoters and attendees.

Implications

Sports tourism is an industry that relies on individuals and groups traveling to attend or participate in sporting events in terms of spending dollars at a certain destination. The facilities and regions that are able to thrive the most in their sports tourism sectors are complexes that offer a variety of sports to cater to all sports tourists. Here are some key implications for the sports tourism industry in terms of the current trends:

- By offering a mix of Fitness Sports, Individual Sports, and Outdoor Sports, facilities are able to attract the majority of active participants across the country as these sections pull in the highest amount of individuals from the youth to adult level.
- Spending within the Sports Tourism Industry has been growing since the COVID-19 pandemic. Facilities have been providing the municipalities they are located in with millions of dollars in spending and associated economic impacts from tournament attendees and participants.
- Facilities are becoming more flexible in their design to allow a plethora of uses among varying sports and event types.
- In order for facilities to be successful, they must include many factors like strong programming, exceptional staff, driven management, thorough marketing and community buy-in.

**Excerpts and
topline findings**

Expo Future Project Feasibility Study

Market Findings – Tasks 4-6

DRAFT

FEBRUARY 22, 2024



The background features two large, faint, light-blue numbers, '0' and '3', which are semi-transparent and serve as a decorative element. The '0' is on the left and the '3' is on the right, both centered vertically.

Local Market

Local Professional & Semi-Professional Sports Facility Supply

Hunden analyzed the supply of professional and semi-professional sports facilities in the local Portland market. Hunden identified 4 facilities.

The supply list includes Moda Center, Providence Park, Veterans Memorial Coliseum (VMC) and Portland International Raceway.

Moda Center induced the largest 2023 visitation numbers, with 2.4 million visits. Portland International Raceway attracted the largest percentage of visits coming from over 100 miles away. Additionally, the event data tables summarize Moda Center and VMC's three-year event and concert data as provided by Pollstar.

The bolded facilities are profiled in further detail on the following slides.

Facility Name	Type	Location	Indoor Basketball	Indoor Volleyball	Soccer / Football Diamonds	Tennis	Indoor Turf	Ice Sheets	Outdoor/Indoor Track	2023 Visits	2023 Visitors	2023 Visits Over 100 Miles
Moda Center	Court Sport	Portland	1	-	-	-	-	-	-	2,430,000	1,402,600	16%
Providence Park	Field Sport	Portland	-	-	-	1	-	-	-	1,100,000	416,800	10%
Veterans Memorial Coliseum	Ice Facility	Portland	-	-	-	-	-	1	-	602,600	415,800	13%
Portland International Raceway	Other	Portland	-	-	-	-	-	-	-	401,600	208,100	18%
Total / Average	4 Facilities		1	0	0	1	0	0	1	1,133,550	610,825	14%

Source: Hunden Partners, Various Facilities

Legend
Court Sport
Field Sport
Ice Facility
Aquatic Center
OTHER

Year	# of Shows	Average Attendance	% of Available Tickets Sold	Avg. Ticket Price
2023	60	10,693	81%	\$94
2022	55	8,896	86%	\$92
2021	19	7,831	82%	\$87
Average	45	9,140	83%	\$91

Source: Pollstar

Year	# of Shows	Average Attendance	% of Available Tickets Sold	Avg. Ticket Price
2023	24	6,416	77%	\$70
2022	10	5,461	72%	\$66
2021	4	5,452	72%	\$52
Average	13	5,776	74%	\$63

Source: Pollstar

Local College/University Sports Facility Supply

Hunden analyzed the supply of college and university sports facilities in the local Portland market. Hunden identified 19 facilities.

The list includes a mix of indoor and outdoor facilities, with a dominant supply of field sports. College and university facilities are adequately supplied in the market; however, ongoing public utilization of these facilities are limited.

Visitor data at these facilities varied greatly, ranging from 19,400 to 378,400 visits in 2023. Stoller Center, which is home to Pacific University's intercollegiate teams, attracted the highest number of visits in 2023. Additionally, this facility attracted the highest percentage of long-distance visitation, with 45 percent of visits in 2023 coming from over 100 miles. The bolded facilities are profiled in further detail on the following slides.

Local College/University Sports Facility Supply

Facility Name	Type	Location	Sport Type							2023 Visits	2023 Visitors	2023 Visits Over 100 Miles	
			Indoor Basketball	Indoor Volleyball	Soccer / Football Diamonds	Tennis	Indoor Turf	Ice Sheets	Outdoor/Indoor Track				
Stoller Center*	Court Sport	Forest Grove	5	7	-	-	2	1	-	-	378,400	47,900	45%
Chiles Center*	Court Sport	Portland	1	1	-	-	-	-	-	-	359,900	130,200	25%
Pamplin Sports Center*	Court Sport	Portland	1	1	-	-	-	-	-	-	346,600	24,300	29%
PCC Rock Creek*	Field Sport	Portland	-	-	4	2	6	-	-	-	217,700	64,300	11%
Wheeler Sports Center*	Court Sport	Newberg	3	3	-	-	-	-	-	-	174,600	22,400	27%
Viking Pavilion*	Court Sport	Portland	1	1	-	-	-	-	-	-	166,400	45,100	21%
Griswold Stadium*	Field Sport	Portland	-	-	-	1	-	-	-	1	120,100	34,500	28%
Randall Hall*	Court Sport	Oregon City	2	2	-	-	-	-	-	-	114,700	27,500	19%
Stoffer Family Stadium*	Field Sport	Newberg	-	-	-	1	-	-	-	-	99,200	29,800	28%
Merto Field*	Field Sport	Portland	-	-	1	-	-	-	-	-	85,100	27,100	28%
Morse Athletic Fields*	Field Sport	Newberg	-	-	2	1	-	-	-	-	63,200	17,800	41%
Joe Etzel Field*	Field Sport	Portland	-	-	1	-	-	-	-	-	62,500	23,700	35%
Stott Community Field*	Field Sport	Portland	-	-	-	1	-	-	-	-	59,200	14,900	24%
Lytle Gymnasium*	Court Sport	Portland	1	1	-	-	-	-	-	-	58,100	12,800	32%
Austin Sports Complex*	Field Sport	Newberg	-	-	-	1	-	-	-	-	39,700	9,600	29%
PCC Cascade Gymnasium*	Court Sport	Portland	1	1	-	-	-	-	-	-	26,000	6,300	10%
Tennis Dome @ Lewis & Clark College*	Court Sport	Portland	-	-	-	-	3	-	-	-	25,700	4,800	32%
Mt. Hood Community College Track*	Field Sport	Gresham	-	-	-	-	-	-	-	1	23,000	16,500	18%
Huston Sports Complex*	Field Sport	Portland	-	-	2	-	-	-	-	-	19,400	5,700	43%
Total / Average	19 Facilities		15	17	10	7	11	1	0	2	128,395	29,747	28%

*Operated by an ISD or College/University

Source: Hunden Partners, Various Facilities

Legend
Court Sport
Field Sport
Ice Facility
Aquatic Center
OTHER

Local Tournament Sports Facility Supply

Hunden also analyzed the supply of tournament sports facilities in the local Portland market. Hunden identified 14 local tournament facilities.

The supply list reveals more than double the number of field sport facilities compared to court sport facilities, highlighting the lack of supply of volleyball and basketball courts for larger regional tournaments. Conversations with local stakeholders underscored the need for more dedicated basketball and volleyball courts. Many high school gyms are required to be utilized for larger tournaments, which poses numerous issues due to the dispersion of courts from one location to another.

Delta Park – Owens Sports Complex attracted the largest number of visitors, with over 692,000 visits in 2023. Additionally, this facility drew the highest number of visits from over 100 miles away. The bolded facilities are profiled in further detail on the following slides.

Facility Name	Type	Location	Indoor Basketball	Indoor Volleyball	Soccer / Football Diamonds	Tennis	Indoor Futsal	Indoor Hardcourt	Ice Sheets	Pickleball	Outdoor/Indoor Track	2023 Visits	2023 Visitors	2023 Visits Over 100 Miles (#)	2023 Visits Over 100 Miles (%)
Delta Park - Owens Sports Complex	Field Sport	Portland	-	-	7	9	-	-	-	-	-	692,900	238,100	110,000	16%
Gordon Faber Recreation Complex	Field Sport	Hillsboro	-	-	7	1	-	-	-	-	-	572,700	271,300	98,000	17%
Winterhawks Skating Center	Ice Facility	Beaverton	-	-	-	-	-	-	1	-	-	339,300	96,700	11,500	3%
Lents Park	Field Sport	Portland	-	-	3	2	2	-	-	-	-	280,200	117,400	31,100	11%
Rose City Futsal East	Court Sport	Portland	-	-	-	-	-	3	-	-	-	178,000	34,700	6,300	4%
The Courts in Beaverton	Court Sport	Beaverton	4	6	-	-	-	-	-	-	-	161,900	37,000	8,300	5%
Rose City Futsal West	Court Sport	Tigard	-	-	-	-	-	3	-	-	-	134,300	28,100	5,700	4%
The People's Courts	Court Sport	Portland	-	-	-	-	-	-	-	11	-	66,300	36,200	6,200	9%
The Plex PDX	Field Sport	Portland	-	-	-	-	2	-	-	-	-	56,600	8,400	2,227	4%
Portland Indoor Soccer Center	Field Sport	Portland	-	-	-	-	1	-	-	-	-	49,000	9,300	3,474	7%
Tualatin Indoor Soccer	Field Sport	Tualatin	-	-	-	-	1	-	-	-	-	29,500	10,700	434	1%
Erv Lind Stadium	Field Sport	Portland	-	-	1	-	-	-	-	-	-	22,800	9,200	2,592	11%
Lincoln Track and Field*	Field Sport	Portland	-	-	-	1	-	-	-	-	1	18,600	8,600	1,490	8%
Hilken Community Stadium	Field Sport	Portland	-	-	1	1	-	-	-	-	-	7,600	3,100	116	2%
Total / Average	14 Facilities		4	6	19	14	2	4	6	1	11	186,407	64,914	20,531	7%

*Operated by an ISD or College/University
Source: Hunden Partners, Various Facilities

Legend
Court Sport
Field Sport
Ice Facility
Aquatic Center
OTHER



Facility demand

Local Sports Facilities Headlines

Limited Indoor Track, Indoor Multi-Use Courts/Fields and Ice

- **Indoor Track.** Although Portland serves as a corporate hub for several running shoe and apparel brands, the local market lacks an indoor facility. While outdoor tracks are available, they present difficulties during the cold and rainy months. Establishing an indoor track facility presents a significant opportunity for the Project to capitalize on and has the potential to ignite a new track culture in Portland.
- **Indoor Multi-Use.** Tournament-caliber indoor basketball and volleyball courts are limited in the market. The addition of 8 to 12 multi-use courts would significantly address this gap. Furthermore, indoor turf fields are undersupplied, with just four indoor fields in the local supply.
- **Ice.** The Winterhawks Skating Center currently supports Portland's entire hockey community. With a sustained year-over-year increase in membership, it is deemed vital to implement a new ice facility to accommodate the growing popularity of this sport in Portland.

Weak Sports Tourism

- **Professional Sports.** Despite Portland's significant presence in the Pacific Northwest, the market lacks robust long-distance sports tourism. In 2023, the two largest sports attractions, Moda Center and Providence Park, each received visits from over 100 miles away that accounted for less than 16 percent of their total visits.
- **Youth & Tournament Sports.** Delta Park, a robust outdoor sports asset in the Portland community, stands out as the primary inducer of long-distance visitation. Apart from this facility and the Gordon Faber Recreation Complex, local facilities primarily draw visitors from within a 25-mile radius, especially indoor assets.

Up-and-Coming Sports: Pickleball and Futsal

- **Pickleball.** Similar to trends nationwide, Portland has seen a surge in pickleball's popularity. The introduction of the People's Court facility, featuring a state-of-the-art 11-court setup that blends the sport with social elements, has brought a new dimension to the local market. However, there is still a need for additional courts to meet the growing demand. One potential solution is to consider adding indoor pickleball court lines to multi-use courts at Expo.
- **Futsal.** Rose City Futsal's two facilities are the sole providers of futsal to the Portland. The sport has experienced increasing popularity, particularly during the rainy and cold months. There is potential to expand its availability by adding futsal lines to multi-use courts at Expo.

Implications

Although Portland, Oregon, and its Metropolitan Statistical Area (MSA) constitute the second-largest population center in the Pacific Northwest, the market contains a gap in robust, multi-use indoor sports facilities that can accommodate both youth and tournament programming. The market is home to three anchored professional teams in Portland – the Portland Trail Blazers, Portland Thorns and Portland Timbers – which contribute to the city's sports-driven culture. However, outside of university/college-anchored facilities, which draw the strongest long-distance visitation, tournament and youth sports/recreation facilities lack any significant long-distance appeal. Data from 2023 indicates that all tournament and youth sport/recreation facilities did not surpass 17 percent in visits originating from over 100 miles away.

When considering specific sport types and market gaps, indoor sports stand out, particularly the need for indoor multi-use basketball and volleyball courts, indoor soccer turf fields, indoor tracks and ice rinks. Stakeholder interviews highlighted robust demand for these sports in the market, yet there is a shortage of facilities to accommodate the Portland community and tournament demand.

Portland is a corporate sports hub and is home to many prominent players in the running and track industry, yet lack an indoor track facility for community and tournament programming. Additionally, hockey has experienced a significant increase in interest in the Portland community. The Winterhawks Skating Center, the primary ice facility for community use, is struggling to meet the rising demand for hockey play. Moreover, the availability of multi-use courts is limited, with the Courts in Beaverton and Beaverton Family YMCA serving as the only dedicated basketball facilities in the local market. Larger tournaments often require the use of high school courts, leading to a complex tournament planning process and unappealing setups for tournament planners seeking to host larger regional tournaments. Pickleball has also experienced a heightened increase in popularity in the Portland market, mirroring national trends.

The Project has the potential to address some, if not all, of these gaps by offering the Portland community a multi-use facility capable of accommodating various sports types, while facilitating larger tournament gatherings within the market.



Regional Sports Facilities Headlines

Urban Location = Local Visitation

- **Urban Location.** The facilities in the Pacific Northwest that are located close to metropolitan areas tend to have much higher local visitation compared to regional and long-distance visitation.
- **Rural Location.** The majority of the facilities that are not located close to a large city tend to have higher percentages of regional and long-distance visitation.
- **The Podium.** The Podium is an exception to an urban facility having mainly local visitation due to it offering an indoor track. This rarity brings in increased long-distance visitation.

Seattle is the Main Hub for Sports in the PNW

- **Seattle's Power in the PNW.** The City of Seattle has one third of the facilities within the regional competitive set of indoor sports tournament facilities in the Pacific Northwest.
- **Population.** Seattle is the largest city by population in Pacific Northwest. With the large capturable market that Seattle has, the city is able to develop more robust sports tournament facilities given the stronger funding mechanisms of a large city.

Low Supply of Tournament-Caliber Facilities

- **Limited large basketball facilities.** There are only two facilities in the Pacific Northwest that can hold more than eight basketball courts which in addition accommodates 16 volleyball courts. This constitutes a large gap in the Pacific Northwest compared to other metropolitan markets throughout the country.
- There are four facilities in the region that can accommodate 5-8 basketball courts for smaller regional tournaments.
- There are also limited tournament-capable indoor turf facilities in the region.

Limited Ice and Limited Track

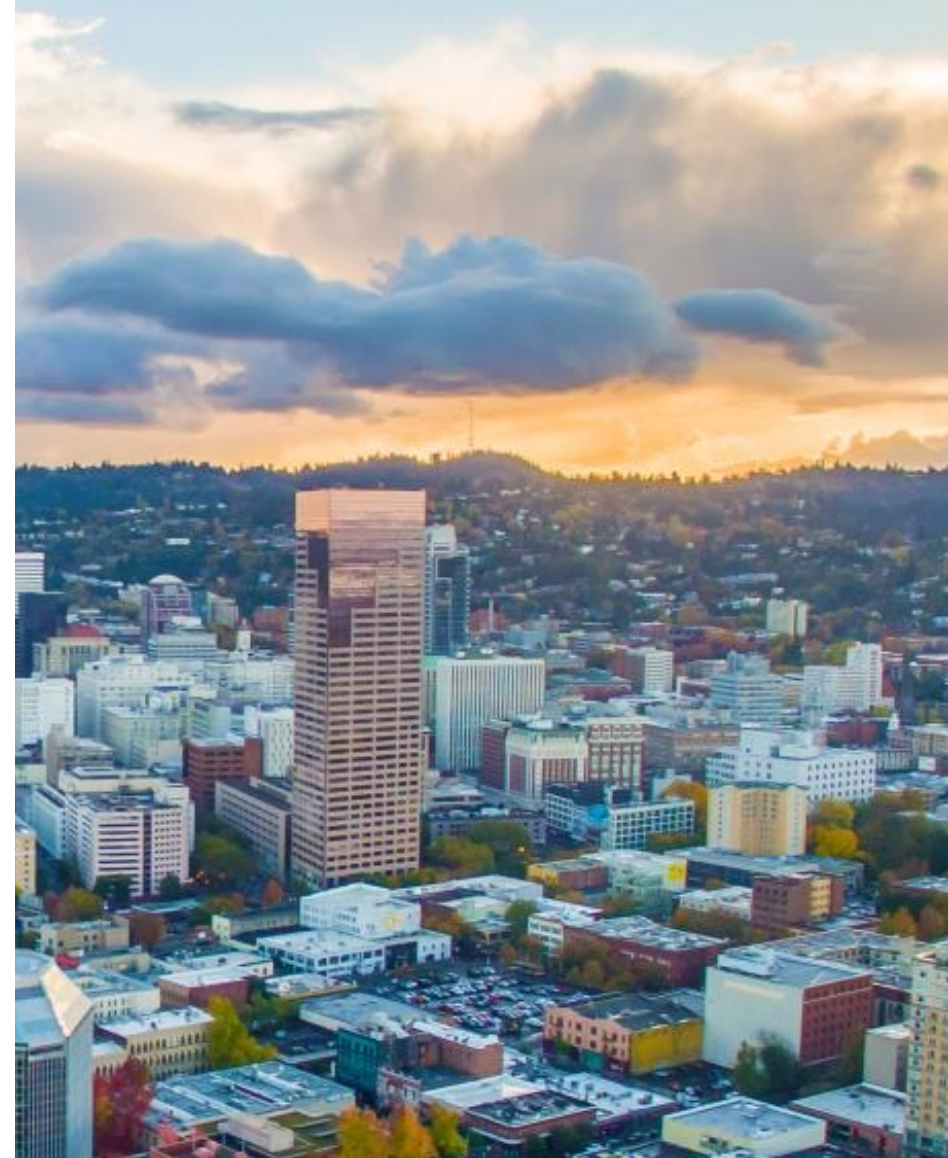
- **Ice Sheets.** The Kraken Community Iceplex is one of few multi-sheet facilities in the Pacific Northwest that have capabilities of hosting regional hockey tournaments. There is an opportunity to build additional multiple-sheet ice facility in the region.
- **Indoor Track.** The Podium is one of few indoor track complexes in the entire Western United States. There is an opportunity to develop additional indoor track in the region.

Implications

The Pacific Northwest is home to multiple youth sports complexes capable of hosting regional tournaments. The majority of the competitive regional supply is located along I-5 in the Seattle metropolitan area. These facilities attract visitation from Washington, Oregon and Idaho, which the Project has the potential to capture with new competitive offerings.

The facilities in the regional competitive set range in proximity to large metropolitan areas. The facilities that are located closer to downtown Seattle tend to have a much higher local visitation compared to facilities like the NW Sports Hub and The Podium which focus more on regional and long-distance visitation. Facilities in more densely populated areas tend to attract 80 to 85 percent of the visitation from the local population, with less of a focus on sports tourism.

There is a lack of indoor spaces in the region, but the cost of indoor facilities has continued to increase since the pandemic. A strong financing plan is needed in order to successfully develop these types of facilities, especially when considering public use.



Facility Need Standards

- The National Recreation and Parks Association (NRPA) sets guidelines for communities when it comes to indoor facility needs and standards.
- The NRPA guidelines recommend 1.5 square feet of indoor recreation space for every citizen in the designated area.
- The adjacent graphic shows the current and future need in the market for indoor recreation space in the City of Portland.



2023 Population: 661,561
2023 Need: 992,342 sf
2028 Population: 669,532
2028 Need: 1,004,298 sf

Current Indoor Recreation Square Footage:
327,951* square feet

2023 Gap: 664,391 sf
2028 Gap: 676,347 sf

* indicates estimated square footage

Source: NRPA, ESRI



Industry trends

What Drives Demand for Facility Development?

Population growth in the local area and active development pipeline in the economy

Large capturable drive-time population that is centrally located among many major population hubs

Strong interest from local, regional and national tournament operators and organizations

Local & regional supply that is not accommodating the demand and growth in the area

What is the Industry Doing?

- **More cities are moving to independent entities (boards, authorities, Local Government Corporations, etc.) to own and sustain their major event facilities.** This move to an independent model occurs especially as facilities and complexes become larger and more important to the local economy. The larger the facility or complex, the more likely the move to an independent entity. This both protects the complex from funding issues in general governments and politics, and provides a competitive, mission-focused entity to oversee the long-term success of a public-private benefit enterprise.
- **More cities are moving to private, contracted management, regardless of ownership.** It is nearly unheard of for a facility to move from private management back to public, but every year, additional cities move to private management to mitigate many of the issues noted above. With a move to private management, there is more accountability, ability to hire / fire, and a focus on key performance indicators (KPI's), such as revenue, expense, room nights, customer service, and others. Hunden has interviewed many cities who have made the change to private management for youth sports facilities and witnessed positive results.
- **Focus on Efficiency of Structure and Process.** As cities have worked to treat sports complexes like the competitive businesses that they are, coordination amongst the sales organization, facilities, and hotels is critical. The most successful structures include weekly, monthly, quarterly, and annual coordination amongst sales entities at the buildings, hotels, and the DMO. To take it one step further, the most aggressive cities are combining the sales force at the building with the DMO to be one entity. In the case of some, the two sales staffs (building and DMO) are co-located in the same office to shorten the communication loop.
- **Ensures that the Governance Board / Structure / Funding is Solid.** Most strong structures include appointments to their boards from people who know the hospitality and sports / event industry and who can ask the right questions of management and contractors. Political appointees without industry background are minimized. The funding streams are also protected for the facilities and DMO.

Comparable Campuses Headlines

Density & Accessibility of an Area

- **Density.** Maximizing the utilization of available space within a facility creates a more complete environment for visitors, which enhances the overall experience for guests. Additionally, having adjacent assets encourages event attendees to remain in the property longer, reducing the likelihood of them leaving the property to spend money elsewhere
- **Accessibility.** A facility needs to have strong highway access in addition to overall airport accessibility to entice super-regional distance travel.

Flexible Use Space & Amenities

- **Facility success comes from more types of business.** In order for a sports facility to be successful and often profitable, there is a need to have expansive offerings of what events or sports can be held at a sports complex. This involves more diversity in the sports and events offered, which leads to an increase in the number of revenue streams.
- **Amenities Upgrades.** Facilities that have large spectator events are recommended to offer several support amenities like restaurants, bars, and entertainment aspects to entice repeat customers and clients to a facility.

Mainly Private Management of Sports Facilities

- **Private outweighs public.** On a national scale, private management of sports facilities is often seen as superior to public management due to its relative efficiency, and incentives to drive profit.
- With privately managed facilities, there is significantly more incentive to advance the offerings a facility might have.

Implications

- Major youth sports complexes draw from across the nation for major tournaments, made possible by the size of their facilities, numerous fields and playing surfaces and high-end supplemental amenities.
- It is critical to form partnerships with organizations to keep the facility rented consistently and receive a stable stream of cash flows from local utilization and community use.
- The feasibility and success of these complexes hinges on the organizational structure, whether it be privately funded / operated, city-owned or operated, or set up as a non-profit organization.
- Indoor facilities must be flexible, open to a variety of event types and uses, and always be creative with branding and exposure.
- The medium-sized facilities with playing surfaces under twelve per type, commonly attract local, state-wide, and regional audiences.
- Support amenities for the families that are travelling to watch their children play are crucial, including food and beverage, entertainment, and hotels and accommodations.





Interview themes

Interviews

In addition to the interviews included prior in this report, Hunden interviewed a variety of additional local stakeholders including community leaders and local / state organizations, facility managers, and event planners/promoters to better understand the sports and entertainment market in Portland and the broader region as well as to understand community and tourism needs that could be accommodated through new sports facilities and supporting developments at Expo. The following are a list of the additional groups interviewed by Hunden to date, with key highlights from those interviewed outlined in the following slides:

- City Staff
- Metro Councilors
- MERC Commissioners
- Travel Portland
- Sport Oregon
- Prosper Portland
- Portland Parks & Recreation
- Tualatin Hills Parks & Recreation
- Beaverton Family YMCA
- Wilmington YMCA
- Sports Facilities Companies
- OVG 360
- Monqui Presents

Local / State Organizations:

- Oregon School Activities Foundation
- Oregon Amateur Athletic Union
- Oregon Cheerleading Coaches Association
- Dance & Drill Coaches Association of Oregon
- Kenton Neighborhood Association
- Portland Track
- Rose City Track Club
- Rose City Futsal
- Hoopsource

Expo User Groups:

- Columbia Empire Volleyball Association
- O'Laughlin Trade Shows
- Home Building Association of Greater Portland
- Rose City Classic Dog Show
- Eight Seconds Juneteenth Rodeo

Interviews Overview

Throughout Hunden's interviews, there were many themes that arose as it relates to the redevelopment of Expo as a sports-centric facility. A summary of these key highlights are outlined below:

The City of Portland is at an inflection point with a need for revitalization. Sports can be a huge catalyst for that and is a strong opportunity for development for the City. Bringing sports to the forefront can be a new way that Portland presents itself as a regional hub for sports, while leveraging the current professional team and sports corporate presence.

Any redevelopment of Expo should support the community and make sense economically and financially. It will be difficult for a facility with public access to be profitable and will likely require significant public subsidy. Hosting larger tournaments will be key, with private management the best route to take because of their network and ability to manage content.

Sports could bring about a new and sustainable revenue stream for Expo while still maintaining Expo's book of repeat business and events. As one of the best multi-use facilities in the Western United States, Expo needs to still be able to host large trade and consumer shows and Expo's current book of business generated by current staff.

The vision for Expo as a community asset needs to be marketed as that and pricing needs to be able to provide equitable access to actualize on that vision. The goal for the redevelopment of Expo would be for it to be more community-driven center during the week, and a competitive tournament facility on the weekends to make it more sustainable from a financial and tourism perspective.

Interviews Overview, cont'd.

A lack of facilities leads to a lack of engagement and lost tourism opportunities. The following are facilities that are were commonly noted opportunities for the redevelopment of Expo:

- Winterhawks home arena and practice facility
- Second additional ice sheet for expanded local programming with flexibility to be used as additional court space
- Minimum 8 basketball / 16 volleyball courts to be able to host large regional tournaments with retractable seating for championship court configurations
- Full-size indoor soccer turf field(s) with divisions and flexibility for other sports (lacrosse and football)
- 200-400m indoor fixed track, though there were mixed opinions on sufficient demand to support this use
- Support facilities such as fitness / training, sports medicine, meeting / classrooms, sport retail, and sports organization offices

Expo should be a locally inspired destination beyond just being a sports facility. Having commercial development on site can encourage extended stays and additional visitor spending. Family entertainment is also needed for visiting families and residents. An on-site family entertainment center can help a public use facility be more financially feasible. Depending on intended audience, additional quality hotel development may be needed to support Expo's future redevelopment.

There is currently a gap in the concert / entertainment market for a 3,000-4,000 capacity venue, though Live Nation is planning to develop a 3,500 capacity venue in Portland to fill that void.

Adidas and Under Armour could present potential public project sponsorship opportunities for the project. Hospital / medical partnerships and sports medicine space is also a strong opportunity as a support amenity for the facility and/or site.

Materials following this page were distributed at the meeting.



Expo Future Project Update

March 12, 2024

Paul Slyman
Ed Washington
James Jessie
Stephanie Redman
Marissa Madrigal

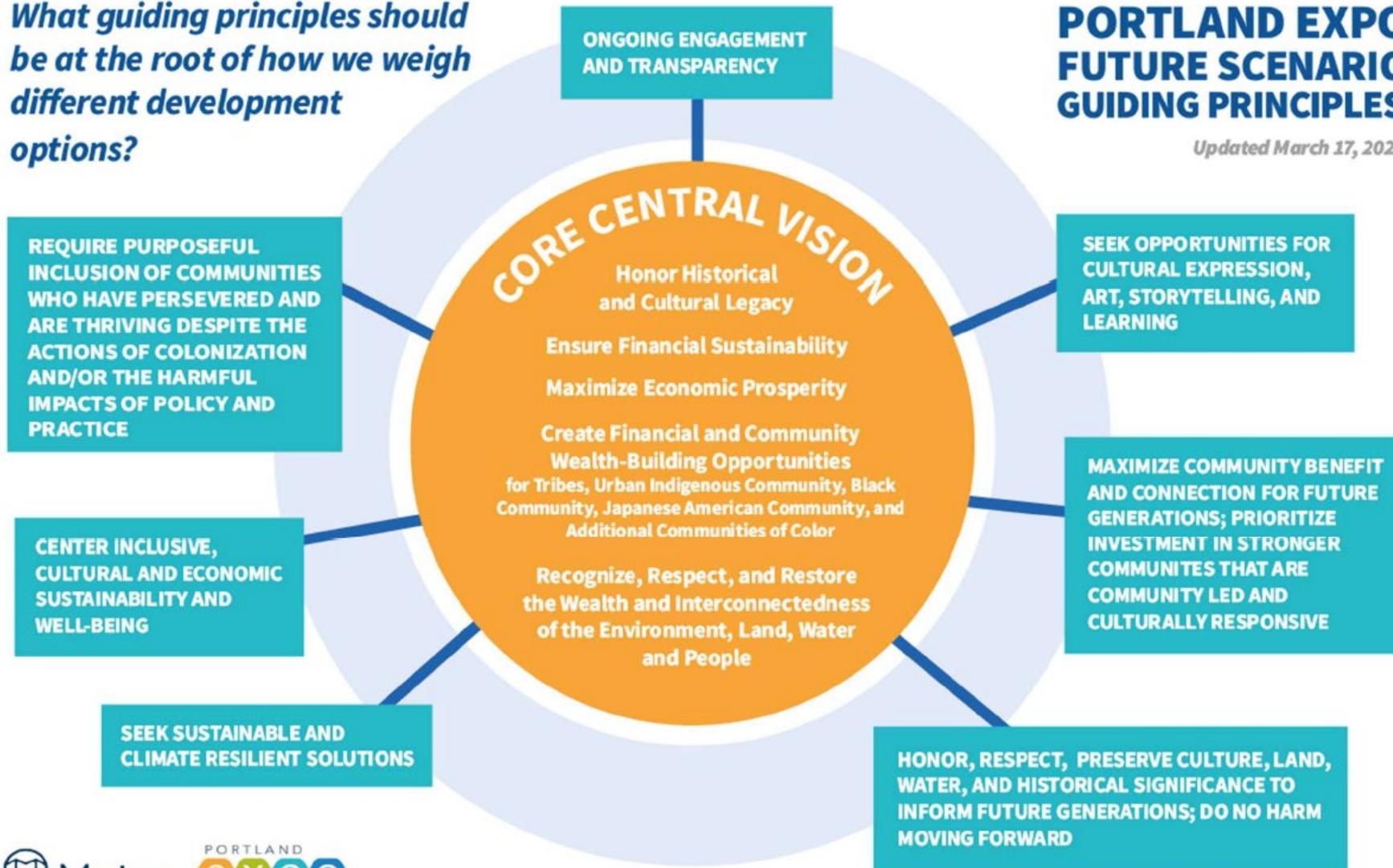
How we got here



What guiding principles should be at the root of how we weigh different development options?

PORTLAND EXPO FUTURE SCENARIO GUIDING PRINCIPLES

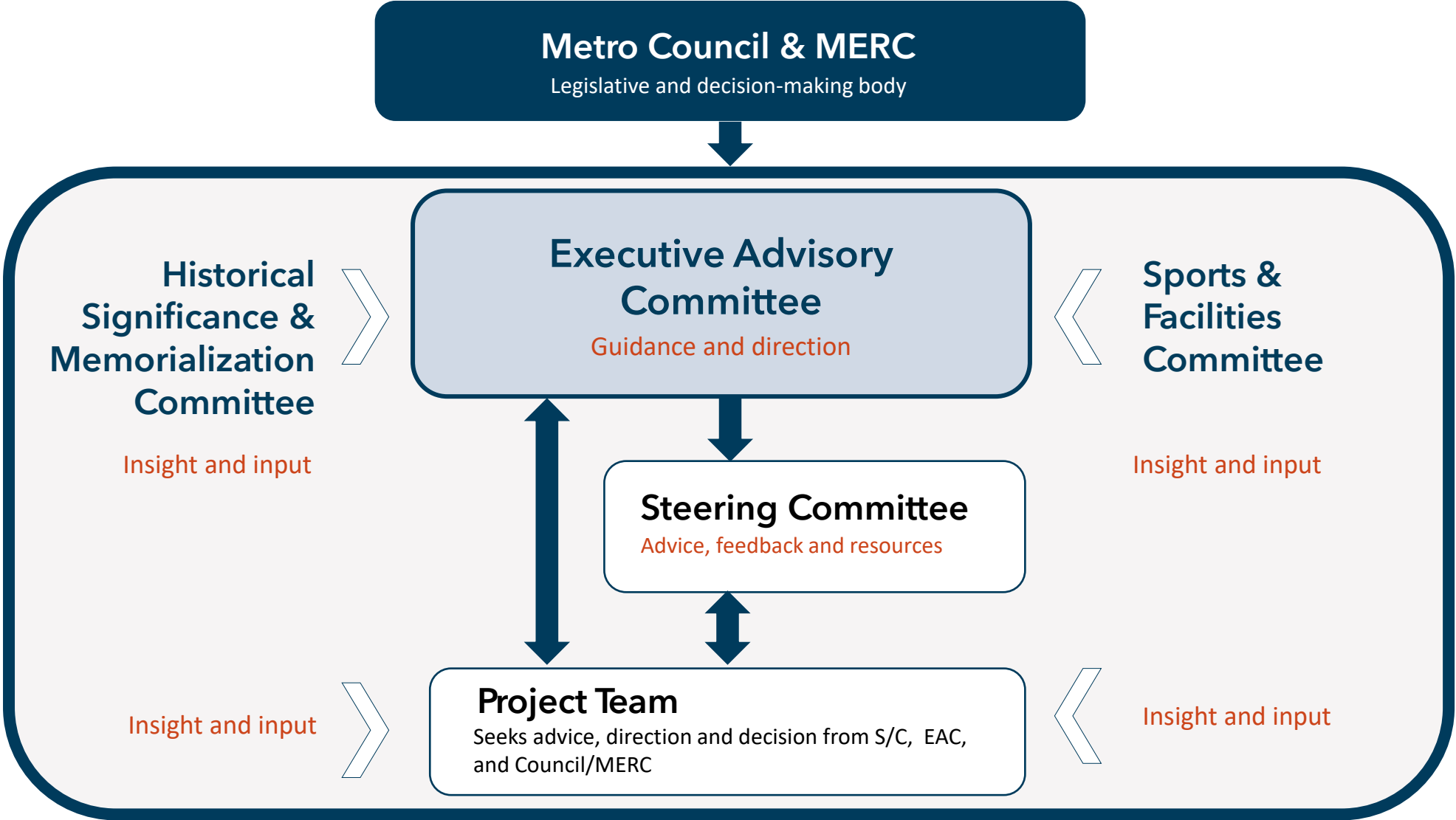
Updated March 17, 2022



Expo Future Project Overview

- Objective 1: Memorialize the historical and cultural significance of the site
- Objective 2: Create a long-term plan for financial sustainability by transforming the Expo Center into a sports-centered facility.





Historical Significance & Memorialization Committee Update

Ed Washington



Sport & Facility Committee Update

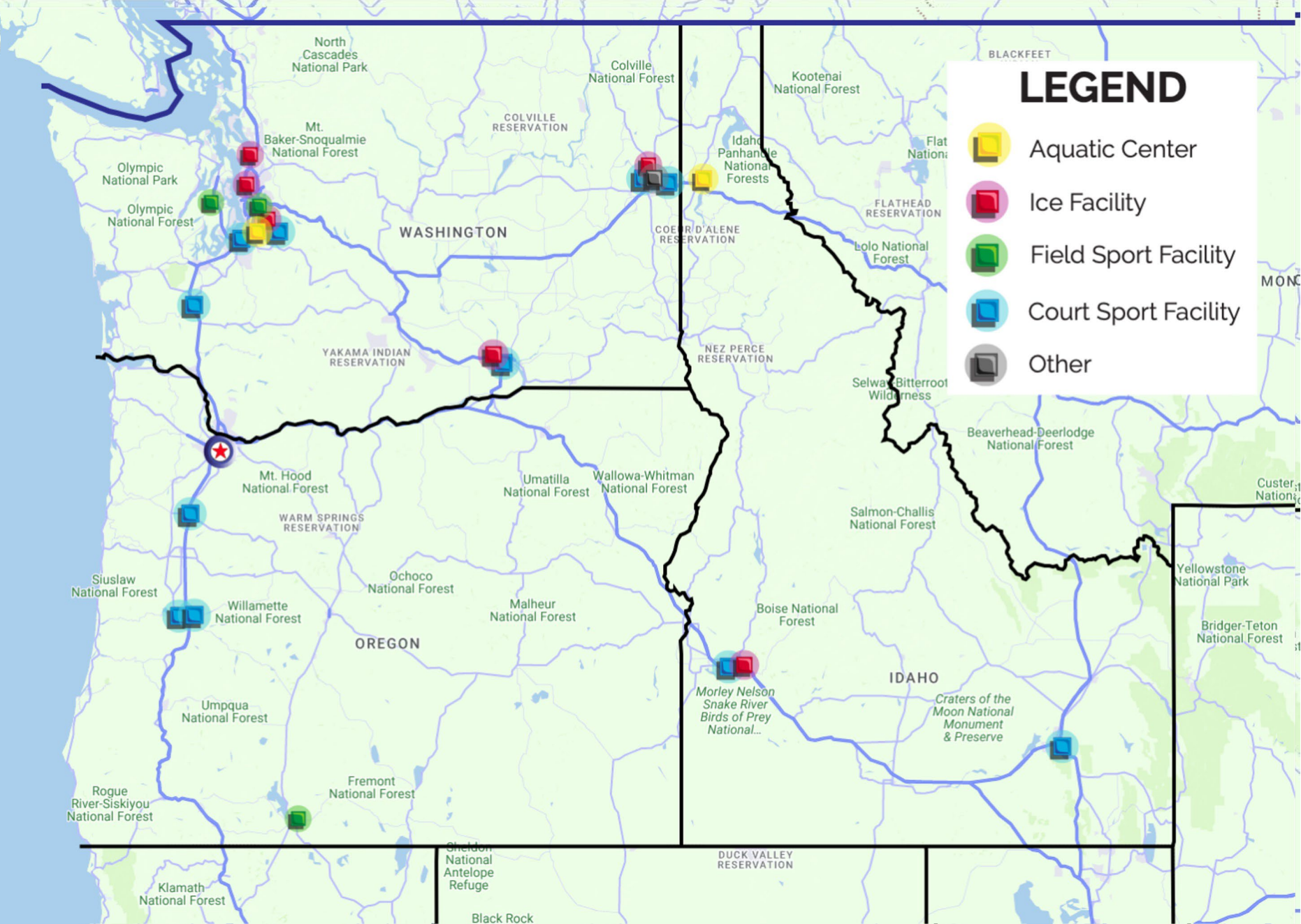
James Jessie



Facilities in the NW Region

Seattle presents the largest supply of tournament-grade sports facilities.

Spokane has the second-largest supply.



Local Sports Facilities Headlines

Limited Indoor Track, Indoor Multi-Use Courts/Fields, Ice

- **Indoor Track.** Portland lacks an indoor track facility. Indoor track presents a significant opportunity for the Project to capitalize on and has the potential to ignite a new track culture in Portland.
- **Indoor Multi-Use.** Tournament-caliber indoor basketball and volleyball courts are limited in the market. Indoor turf fields are undersupplied.
- **Ice.** The Winterhawks Skating Center currently supports Portland's entire ice hockey community. It is deemed vital to implement a new ice facility to accommodate the growing popularity of this sport in Portland.

Weak Sports Tourism

- **Professional Sports.** Portland's market lacks robust long-distance sports tourism. In 2023, visitors from more than 100 miles away were less than 16 percent of Moda Center and Providence Park's total visits.
- **Youth & Tournament Sports.** Delta Park and Hillsboro's Gordon Faber Recreation Complex leads long-distance visitation, but most local facilities primarily draw visitors from within a 25-mile radius, especially indoor assets.

Up-and-Coming Sports: Pickleball and Futsal

- **Pickleball.** Similar to national trends, Portland has seen a surge in pickleball's popularity. The People's Court state-of-the-art 11-court setup has brought a new dimension to the local market. However, demand for additional courts continues to grow.
- **Futsal.** Rose City Futsal's two facilities are the only futsal providers to the Portland region. The sport has experienced increasing popularity, particularly during the rainy and cold months.

Sports & Event Venue Trends

Multi-Purpose Venues



Multi-purpose venues are becoming increasingly popular as they allow for a diverse range of revenue streams and event capabilities due to year-round activation. As a result, layouts that support a multi-purpose venue have dominated the market in recent years.

Flexible Flooring/Seating



Designing a facility that is compatible for multiple sports can reduce negative impacts on a facility's profitability. Forms of bleacher seating and portable flooring can be convertible in more efficient and rapid manners to enhance how multi-faceted a facility can be with the sports and activities they plan to offer.

Venue Flexibility



As venues push to accommodate a variety of events, venue flexibility continues to become more crucial. Some design trends include stage-end scoreboards for a more inclusive viewing experience, retractable roofing, and ancillary seating that allows for future expansion. Additional multi-functional spaces are often included to cater to meetings and private event business.

Multi-Use Entertainment Districts



To attract crowds before and after events, venues are being strategically designed to compliment restaurant/retail and entertainment both within the venue and its surrounding area, as well as nearby accommodations through hotel and residential development. Maximizing foot traffic is important for successful sports-anchored districts, which is why dense entertainment districts surrounding venues are on the rise to make venues more attractive to promoters and attendees.

Sport & Facility Committee Update

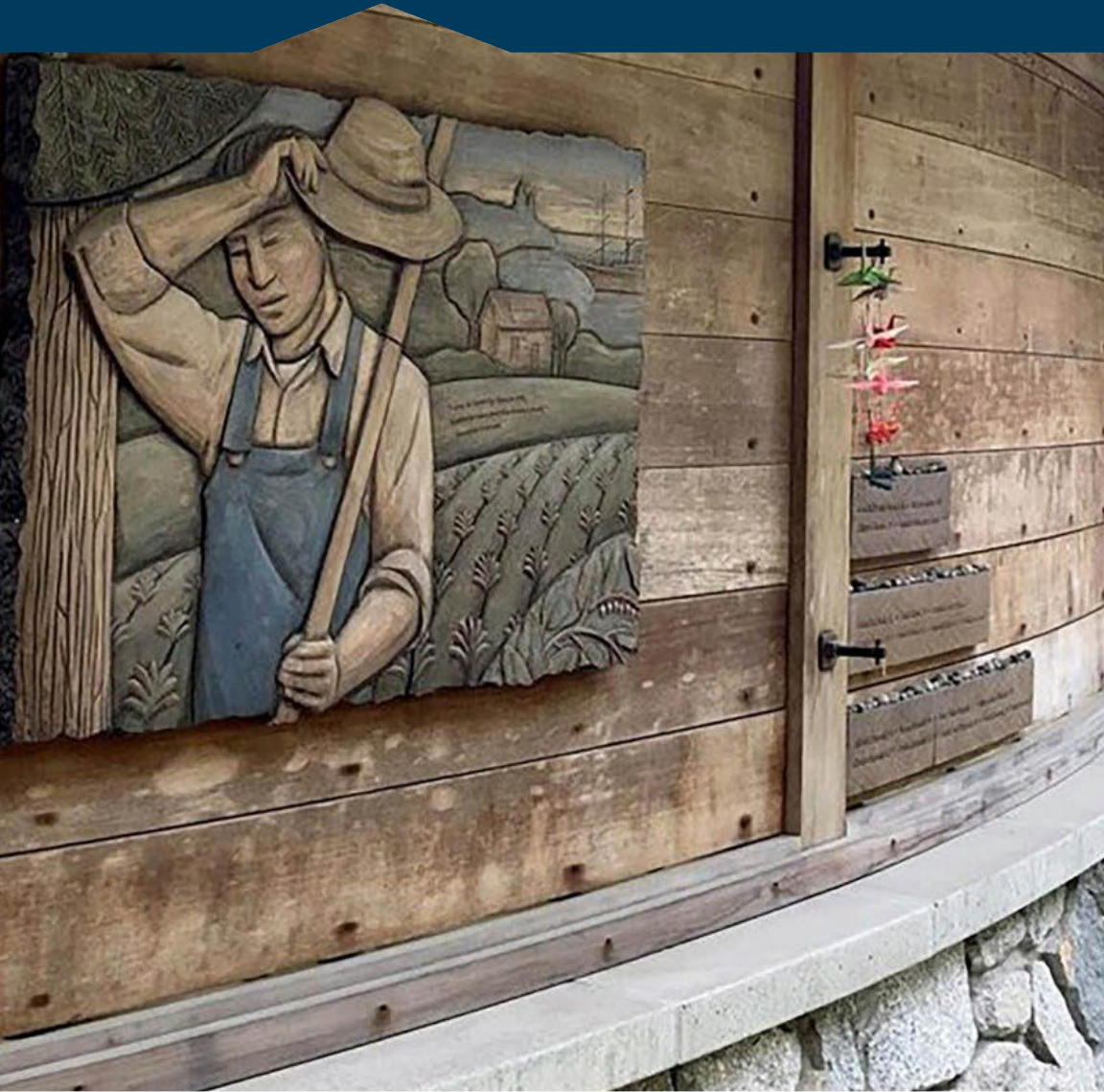
James Jessie



Looking forward

- Community and Tribal Government engagement
- Completion of sports feasibility study
- Funding and other strategies

Community Engagement: May to August



Engagement milestones

OBJECTIVE 01:
HISTORY & CULTURE

MARCH 2024

MAY

JUNE

JULY

AUGUST

NOVEMBER

DECEMBER 2024

Engagement planning
Stakeholder interviews
Storytelling event planning
Decision-making framework

Community engagement
Tribal Government engagement
Data verification
Storytelling event (June)

Confirmation of engagement input
Analysis of engagement input
Development of history & culture recommendations

**MERC-Council
Joint Meeting**
Approval of
Project
development/
funding plan

Sports feasibility study

**hunden
partners**

Expo Future Project Feasibility Study

Market Findings – Tasks 4-6

DRAFT

FEBRUARY 22, 2024



Sports feasibility study milestones

OBJECTIVE 02:
SPORTS PIVOT

MARCH 2024

**Sports feasibility study:
market analysis & concept**
Development of 5 use scenarios
Identification of support amenities
Five visual representations

JUNE

**MERC-Council
Joint Meeting**
Approval of
sports pivot

JULY

**Sports feasibility study:
the business case**
Development of cost estimates
Demand and financial projections
30-year economic impact analysis
Assessment of funding options

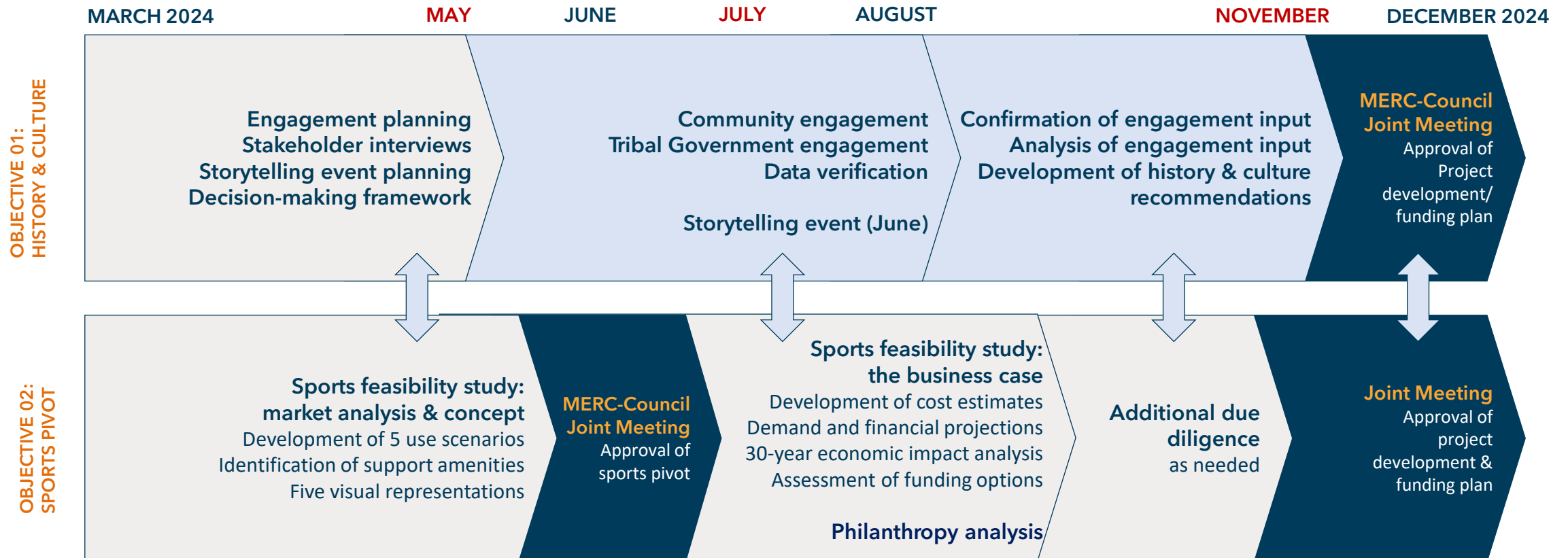
Philanthropy analysis

DECEMBER 2024

**Additional due
diligence**
as needed

**MERC-Council
Joint Meeting**
Approval of
project
development &
funding plan

Expo Future Phase 2 milestones



Portland Metro Chamber: sports econ. impact panel



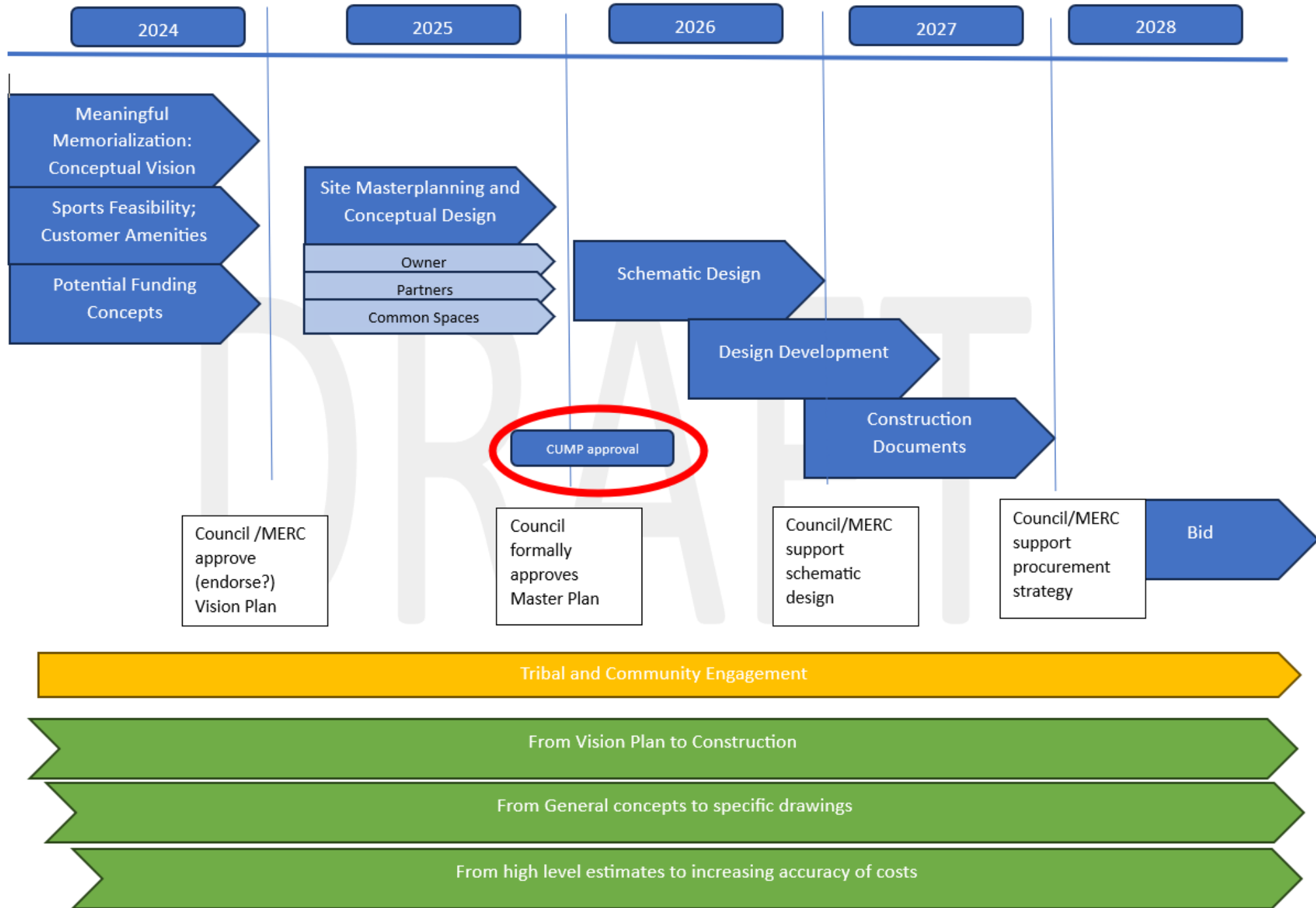
Questions for Councilors

- Does Metro Council have any questions, feedback or guidance for the project at this time?
- Does Metro Council have any specific information or data needs before the joint Council/MERC meeting in June?

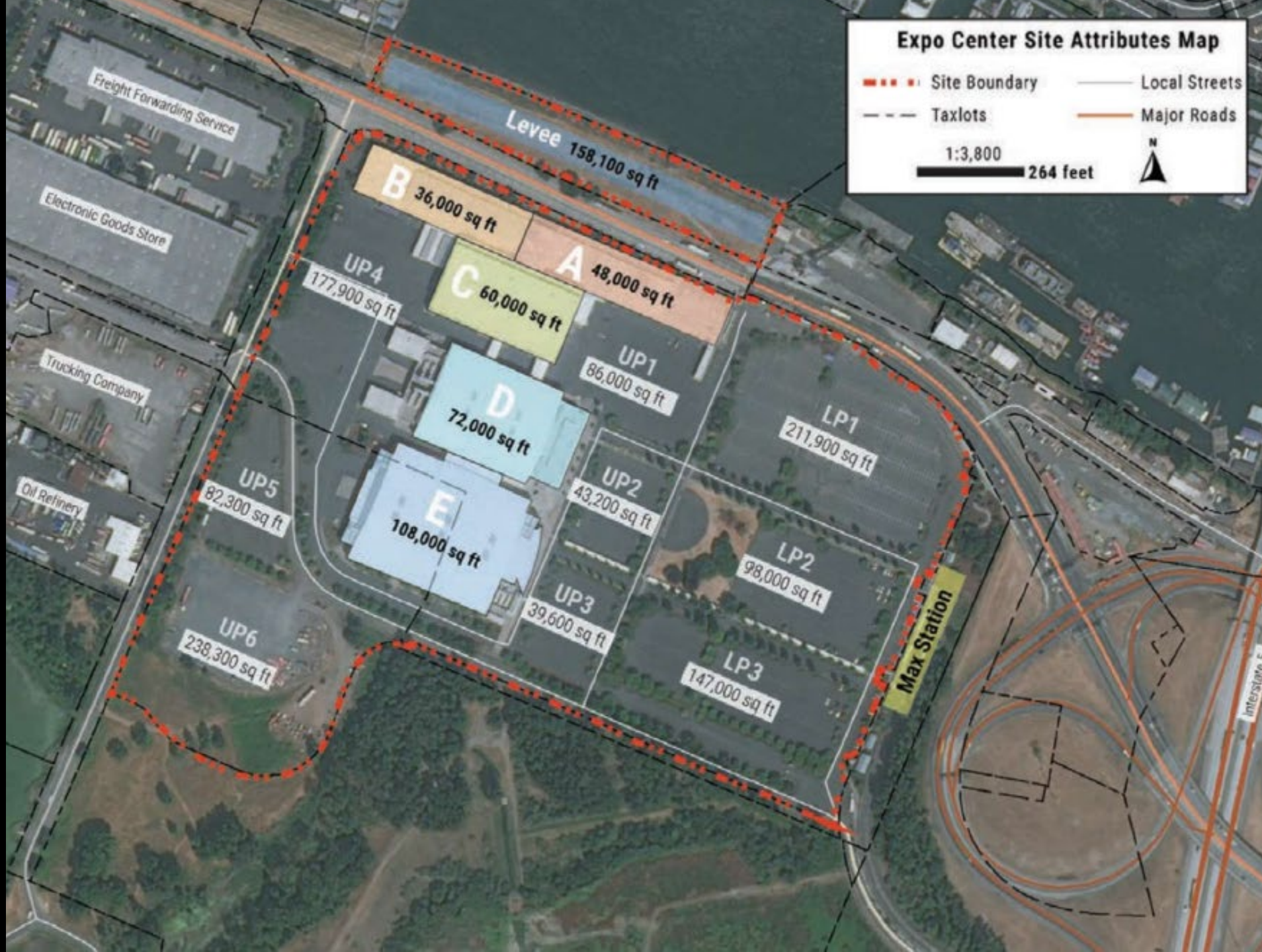
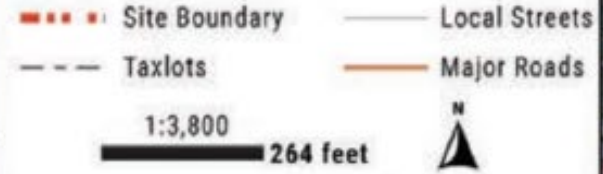
oregonmetro.gov



Slides in reserve



Expo Center Site Attributes Map




Trimet's proposed overnight facility: upper & lower 3


EXPO STATION

The following ongoing analysis will guide the next stage of design at Expo Station:

MAINTENANCE FACILITY

 What is the best location within the Expo Center site for the maintenance facility?

STATION ACCESS INCLUDES:

 What combination of plazas, sidewalks, ramps serve the station?

PRIMARY PED/BIKE CONNECTIONS AT:




- Martin Luther King Jr Blvd
- Pier 99 Street

BUS TRANSFER AT:




- Marine Drive and
- Expo Road

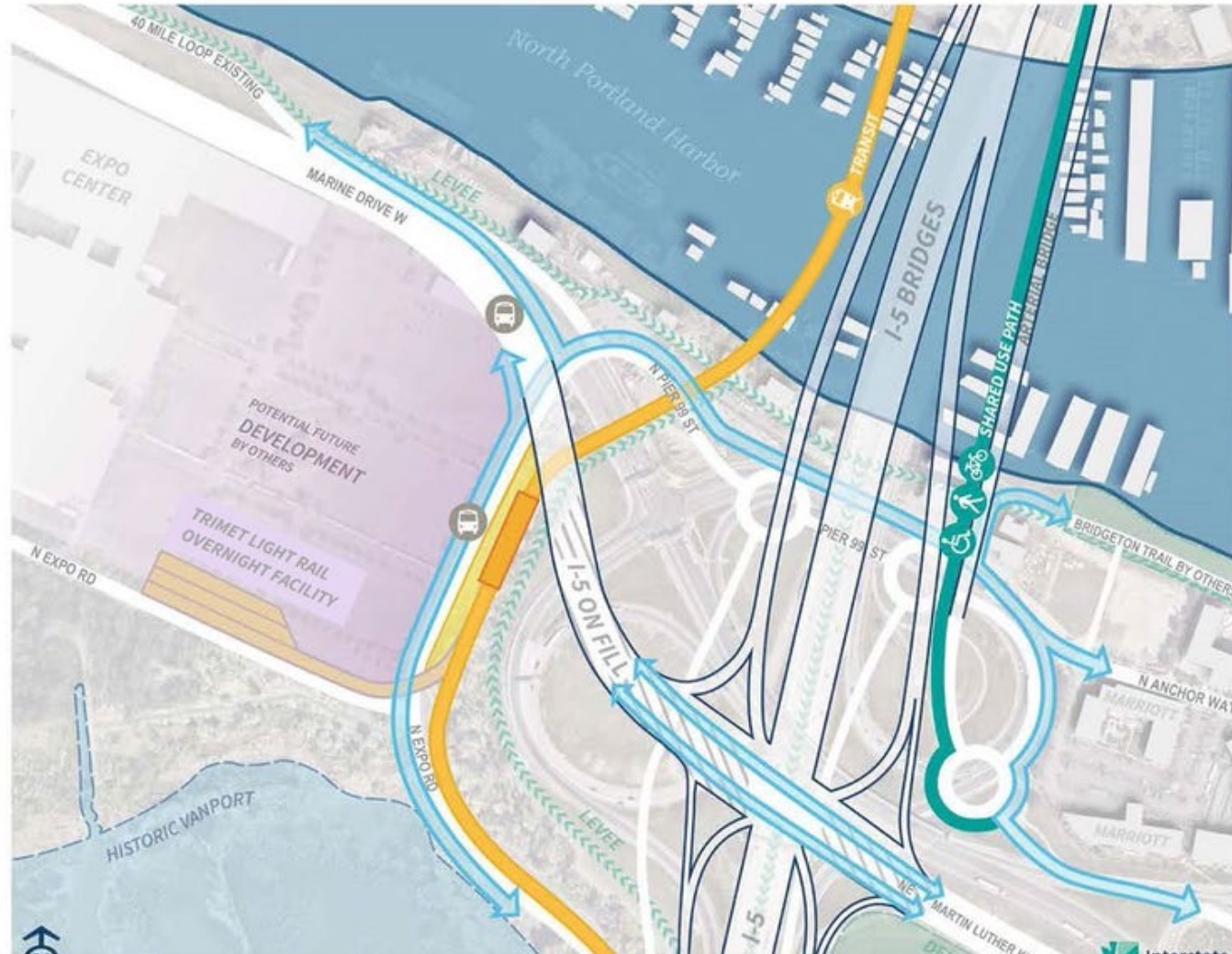
LEVEE

 Program to coordinate with levee reconstruction by others

Additional Context:

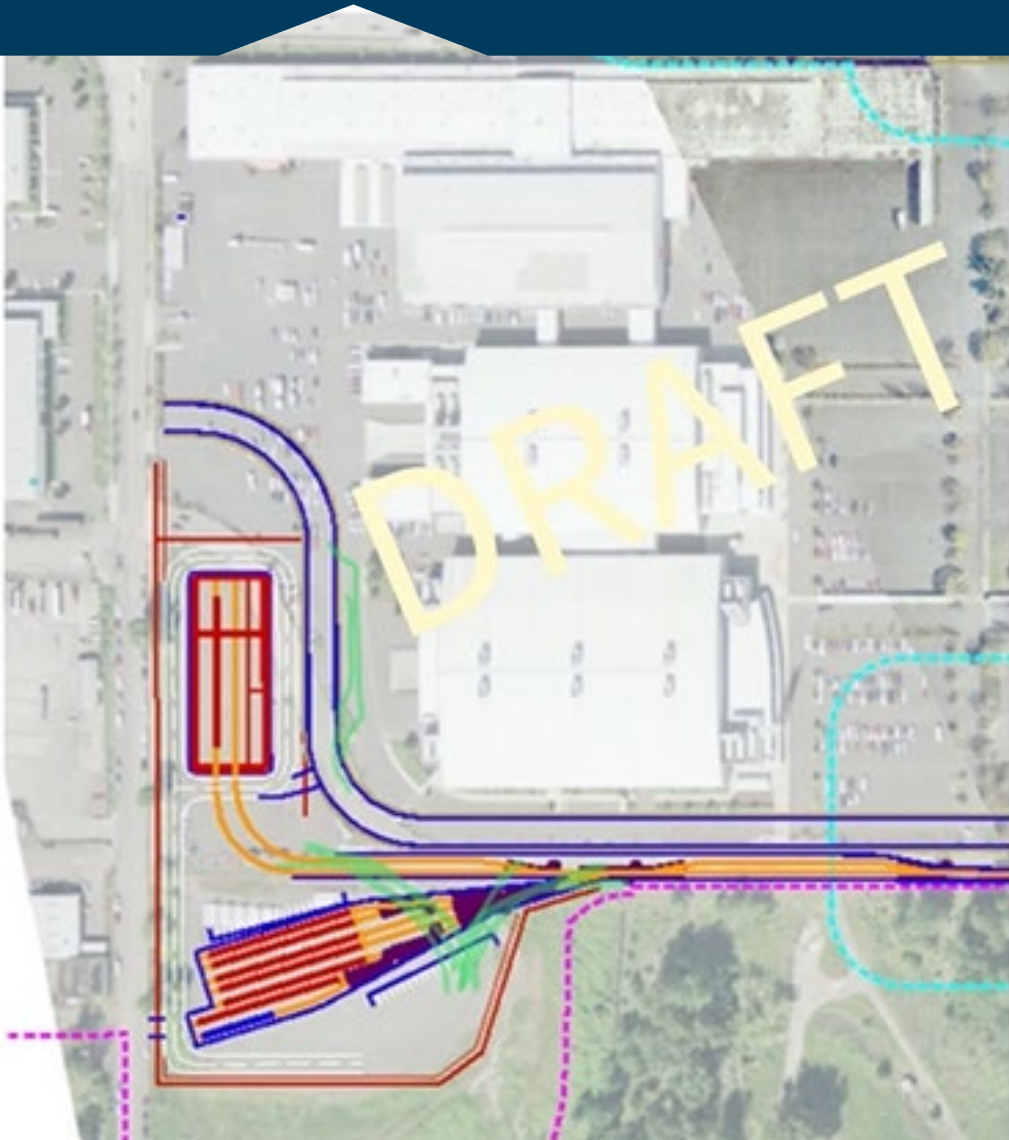
FUTURE LAND USE

 Shaded areas depict future land use by others



Nov. 2023

Trimet's proposed overnight facility: SW and West



Per Trimet's analysis, this site

- ▶ Meets operational need
- ▶ May not be final layout
- ▶ Minimizes development impact
- ▶ Retains development-station connection
- ▶ Realigns Expo Road
- ▶ Future environmental update?

Trimet's overnight facility requirements

▶ Minimum program requirements:

- Interior cleaning bay
- One light maintenance bay
- Reporting building
- Staff support and employee wellness areas
- Staff parking
- Sand silo
- Parts storage
- Tool and equipment storage
- Two yard leads
- Reconstructed Operator Break Facility near station
- Reconstructed TPSS
- Reconstructed Signal/Communications (Sig/Comm) Building
- No runaround track
- No third track at Expo station

Initial tangible memorialization ideas

- Native plantings
- Oral histories, audio in multiple languages
- Architecture and connecting the story of Hall A to other Expo buildings
- Highlighting views of Vanport, camas fields from parking lot

Initial tangible memorialization ideas, con't.

- Rotating art installations reflective of impacted communities
- Offering culturally relevant foods
- Walking path that shows consecutive history of site
- Reflect themes in décor of buildings, quotes on walls
- Connection to nature, trees, water

Initial intangible memorialization ideas

- A feeling of coming home and healing
- Moments of silence at events
- Community access – open, unpaid ways to access to serve community (hold events, workshops, learning)
- Naming places within the site
- A solemn space for personal connections, reflection
- Regular onsite events that highlight history and culture (with virtual attendance options)

Initial intangible memorialization ideas, con't.

- Youth workforce/training opportunity
- What is shared with event participants in advance?
- Online resources and programming accessible by links and onsite QR codes
- Balance a confrontation of true history with a sense of learning, healing

1.6. Section D: Funding Options

12. Task 12: Funding Options

The Consultant will evaluate capital and long-term operations funding options for Metro to consider in pivoting to this new model. These options should clearly describe the funding available for initial construction and future expansions.

- 12.1. The Consultant will assess the potential private and public funding mechanisms available to Metro to capitalize the new operations and ensure satisfactory funding for ongoing operations and maintenance.
- 12.2. The Consultant will provide best practices and lessons learned from similar developments that utilized creative funding structures to work toward implementation and ongoing operations.
- 12.3. As part of these efforts, the Consultant will consider naming rights valuation, sponsorships, partnership opportunities, private and public sector financing options, and other as appropriate and provide implications for the Project.

Topline market findings

- 11.3M people can access Portland within a five-hour drive time
- Portland's above-average median household income includes surplus disposable income, suggesting opportunities for spending on local sports and entertainment.
- The Portland MSA has an estimated 7,704 sports-related jobs across professional/semiprofessional teams, recreational sports teams and camps, and sports and recreation instruction. Earnings per job range from \$27,498 to \$285,857.
- 7 of 10 of Multnomah County's most-visited attractions are primarily sports-related. Portland Expo Center ranks 7th in visitation.

Topline findings: U.S. sports participation

- Sports participation in the U.S. increased annually from 2017 to 2022, except for individual sports and winter sports.
- Participation in outdoor sports, fitness, racquet, water, and team sports increased from 2017 to 2022.
- Highest rates of team sports participation include basketball, soccer, and football, followed by indoor/outdoor volleyball.

Topline findings: U.S. sports tourism trends

- The sports tourism industry declined 53% in 2020 during the COVID-19 pandemic.
- By 2021, the industry returned to 88% of 2019 spending levels.
- In 2021, sports tourism-related spending totaled \$39.7B.
- Established sports tourism markets can generate \$600 more per day in average family spending than a market that lacks significant a significant tourism industry and \$282 more per day than a tourism market that does not include youth/amateur sports.

What drives demand for facility development

Population growth in the local area and active development pipeline in the economy

Large capturable drive-time population that is centrally located among many major population hubs

Strong interest from local, regional and national tournament operators and organizations

Local & regional supply that is not accommodating the demand and growth in the area

Interviews

Hunden interviewed community leaders, local/state organizations, facility managers, and event planners/promoters to better understand the sports and entertainment market and community and tourism needs that could be accommodated through new sports facilities and supporting developments at Expo.

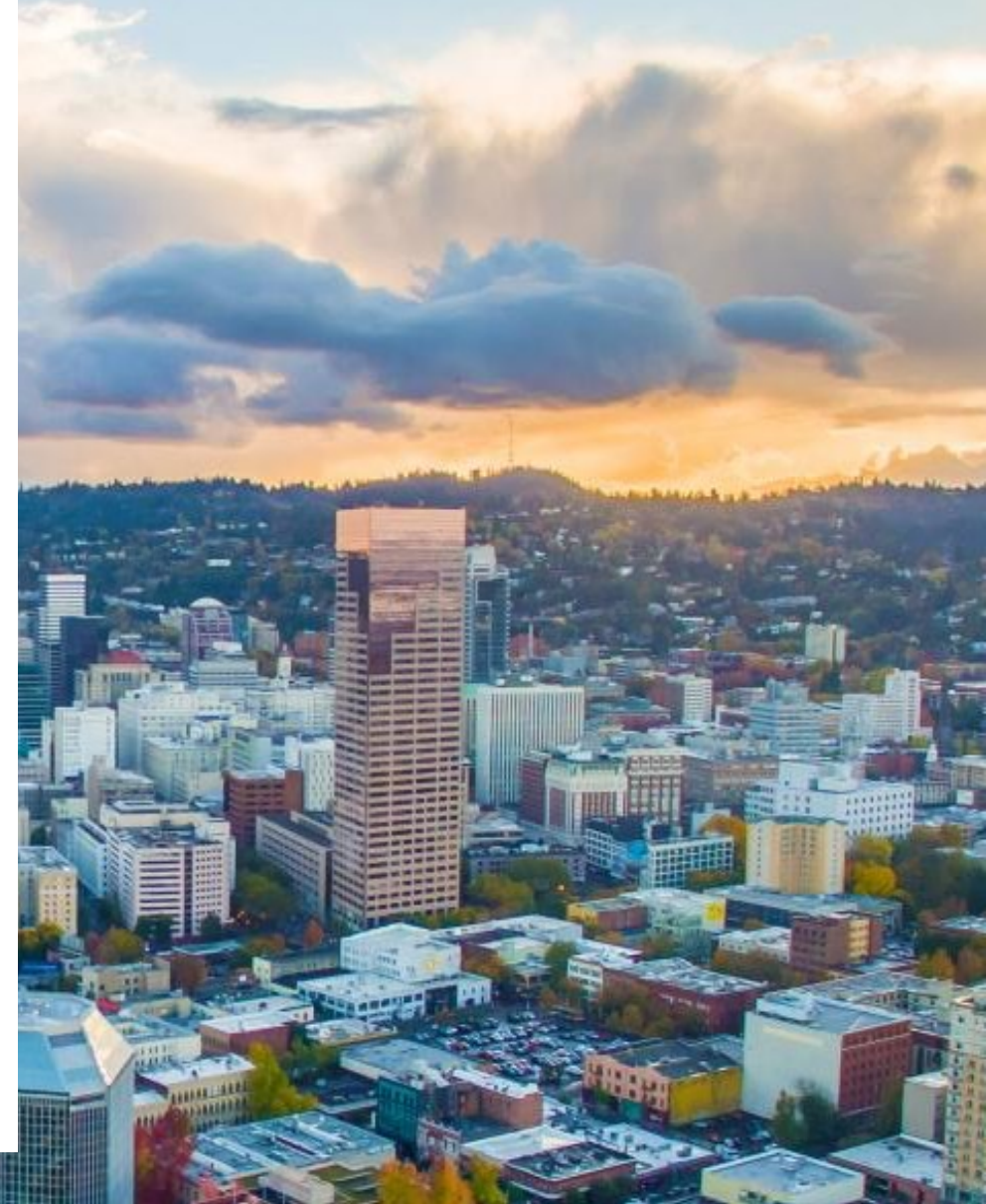
- City Staff
- Metro Councilors
- MERC Commissioners
- Travel Portland
- Sport Oregon
- Prosper Portland
- Portland Parks & Recreation
- Tualatin Hills Parks & Recreation
- Beaverton Family YMCA
- Wilmington YMCA
- Sports Facilities Companies
- OVG 360
- Monqui Presents

Local / State Organizations:

- Oregon School Activities Foundation
- Oregon Amateur Athletic Union
- Oregon Cheerleading Coaches Association
- Dance & Drill Coaches Association of Oregon
- Kenton Neighborhood Association
- Portland Track
- Rose City Track Club
- Rose City Futsal
- Hoopsource

Expo User Groups:

- Columbia Empire Volleyball Association
- O'Laughlin Trade Shows
- Home Building Association of Greater Portland
- Rose City Classic Dog Show
- Eight Seconds Juneteenth Rodeo



Local Professional & Semi-Professional Sports Facility Supply

Hunden analyzed the supply of professional and semi-professional sports facilities in the local Portland market. Hunden identified 4 facilities.

The supply list includes Moda Center, Providence Park, Veterans Memorial Coliseum (VMC) and Portland International Raceway.

Moda Center induced the largest 2023 visitation numbers, with 2.4 million visits. Portland International Raceway attracted the largest percentage of visits coming from over 100 miles away. Additionally, the event data tables summarize Moda Center and VMC's three-year event and concert data as provided by Pollstar.

The bolded facilities are profiled in further detail on the following slides.

Facility Name	Type	Location	Indoor Basketball	Indoor Volleyball	Soccer / Football Diamonds	Tennis	Indoor Turf	Ice Sheets	Outdoor/Indoor Track	2023 Visits	2023 Visitors	2023 Visits Over 100 Miles
Moda Center	Court Sport	Portland	1	-	-	-	-	-	-	2,430,000	1,402,600	16%
Providence Park	Field Sport	Portland	-	-	1	-	-	-	-	1,100,000	416,800	10%
Veterans Memorial Coliseum	Ice Facility	Portland	-	-	-	-	-	1	-	602,600	415,800	13%
Portland International Raceway	Other	Portland	-	-	-	-	-	-	-	401,600	208,100	18%
Total / Average	4 Facilities		1	0	0	1	0	0	1	1,133,550	610,825	14%

Source: Hunden Partners, Various Facilities

Court Sport
Field Sport
Ice Facility
Aquatic Center
OTHER

Year	# of Shows	Average Attendance	% of Available Tickets Sold	Avg. Ticket Price
2023	60	10,693	81%	\$94
2022	55	8,896	86%	\$92
2021	19	7,831	82%	\$87
Average	45	9,140	83%	\$91

Source: Pollstar

Year	# of Shows	Average Attendance	% of Available Tickets Sold	Avg. Ticket Price
2023	24	6,416	77%	\$70
2022	10	5,461	72%	\$66
2021	4	5,452	72%	\$52
Average	13	5,776	74%	\$63

Source: Pollstar

Local College/University Sports Facility Supply

Hunden analyzed the supply of college and university sports facilities in the local Portland market. Hunden identified 19 facilities.

The list includes a mix of indoor and outdoor facilities, with a dominant supply of field sports. College and university facilities are adequately supplied in the market; however, ongoing public utilization of these facilities are limited.

Visitor data at these facilities varied greatly, ranging from 19,400 to 378,400 visits in 2023. Stoller Center, which is home to Pacific University’s intercollegiate teams, attracted the highest number of visits in 2023. Additionally, this facility attracted the highest percentage of long-distance visitation, with 45 percent of visits in 2023 coming from over 100 miles. The bolded facilities are profiled in further detail on the following slides.

Local College/University Sports Facility Supply													
Facility Name	Type	Location									2023 Visits	2023 Visitors	2023 Visits Over 100 Miles
			Indoor Basketball	Indoor Volleyball	Soccer / Football Diamonds	Tennis	Indoor Turf	Ice Sheets	Outdoor/Indoor Track				
Stoller Center*	Court Sport	Forest Grove	5	7	-	-	2	1	-	-	378,400	47,900	45%
Chiles Center*	Court Sport	Portland	1	1	-	-	-	-	-	-	359,900	130,200	25%
Pamplin Sports Center*	Court Sport	Portland	1	1	-	-	-	-	-	-	346,600	24,300	29%
PCC Rock Creek*	Field Sport	Portland	-	-	4	2	6	-	-	-	217,700	64,300	11%
Wheeler Sports Center*	Court Sport	Newberg	3	3	-	-	-	-	-	-	174,600	22,400	27%
Viking Pavilion*	Court Sport	Portland	1	1	-	-	-	-	-	-	166,400	45,100	21%
Griswold Stadium*	Field Sport	Portland	-	-	-	1	-	-	-	1	120,100	34,500	28%
Randall Hall*	Court Sport	Oregon City	2	2	-	-	-	-	-	-	114,700	27,500	19%
Stoffer Family Stadium*	Field Sport	Newberg	-	-	-	1	-	-	-	-	99,200	29,800	28%
Merlo Field*	Field Sport	Portland	-	-	1	-	-	-	-	-	85,100	27,100	28%
Morse Athletic Fields*	Field Sport	Newberg	-	-	2	1	-	-	-	-	63,200	17,800	41%
Joe Etzel Field*	Field Sport	Portland	-	-	1	-	-	-	-	-	62,500	23,700	35%
Stott Community Field*	Field Sport	Portland	-	-	-	1	-	-	-	-	59,200	14,900	24%
<small>*Operated by an ISD or College/University Source: Hunden Partners, Various Facilities</small>													
Austin Sports Complex*	Field Sport	Newberg	-	-	-	1	-	-	-	-	39,700	9,600	29%
PCC Cascade Gymnasium*	Court Sport	Portland	1	1	-	-	-	-	-	-	26,000	6,300	10%
Tennis Dome @ Lewis & Clark College*	Court Sport	Portland	-	-	-	-	3	-	-	-	25,700	4,800	32%
Mt. Hood Community College Track*	Field Sport	Gresham	-	-	-	-	-	-	-	1	23,000	16,500	18%
Huston Sports Complex*	Field Sport	Portland	-	-	2	-	-	-	-	-	19,400	5,700	43%
Total / Average	19 Facilities		15	17	10	7	11	1	0	2	128,395	29,747	28%

Local Tournament Sports Facility Supply

Hunden also analyzed the supply of tournament sports facilities in the local Portland market. Hunden identified 14 local tournament facilities.

The supply list reveals more than double the number of field sport facilities compared to court sport facilities, highlighting the lack of supply of volleyball and basketball courts for larger regional tournaments. Conversations with local stakeholders underscored the need for more dedicated basketball and volleyball courts. Many high school gyms are required to be utilized for larger tournaments, which poses numerous issues due to the dispersion of courts from one location to another.

Delta Park – Owens Sports Complex attracted the largest number of visitors, with over 692,000 visits in 2023. Additionally, this facility drew the highest number of visits from over 100 miles away. The bolded facilities are profiled in further detail on the following slides.

Local Tournament Sports Facility Supply																	
Facility Name	Type	Location										2023 Visits	2023 Visitors	2023 Visits Over 100 Miles (#)	2023 Visits Over 100 Miles (%)		
			Indoor Basketball	Indoor Volleyball	Diamonds	Soccer / Football	Tennis	Indoor Turf	Indoor Futsal/Hardcourt	Ice Sheets	Pickleball					Outdoor/Indoor Track	
Delta Park - Owens Sports Complex	Field Sport	Portland	-	-	7	9	-	-	-	-	-	-	692,900	238,100	110,000	16%	
Gordon Faber Recreation Complex	Field Sport	Hillsboro	-	-	7	1	-	-	-	-	-	-	572,700	271,300	98,000	17%	
Winterhawks Skating Center	Ice Facility	Beaverton	-	-	-	-	-	-	-	1	-	-	339,300	96,700	11,500	3%	
Lents Park	Field Sport	Portland	-	-	3	2	2	-	-	-	-	-	280,200	117,400	31,100	11%	
Rose City Futsal East	Court Sport	Portland	-	-	-	-	-	-	3	-	-	-	178,000	34,700	6,300	4%	
The Courts in Beaverton	Court Sport	Beaverton	4	6	-	-	-	-	-	-	-	-	161,900	37,000	8,300	5%	
Rose City Futsal West	Court Sport	Tigard	-	-	-	-	-	-	3	-	-	-	134,300	28,100	5,700	4%	
The People's Courts	Court Sport	Portland	-	-	-	-	-	-	-	-	11	-	66,300	36,200	6,200	9%	
The Plex PDX	Field Sport	Portland	-	-	-	-	-	2	-	-	-	-	56,600	8,400	2,227	4%	
Portland Indoor Soccer Center	Field Sport	Portland	-	-	-	-	-	1	-	-	-	-	49,000	9,300	3,474	7%	
Tualatin Indoor Soccer	Field Sport	Tualatin	-	-	-	-	-	1	-	-	-	-	29,500	10,700	434	1%	
Erv and Ed Stadium	Field Sport	Portland	-	-	1	-	-	-	-	-	-	-	22,800	9,200	2,592	11%	
Lincoln Track and Field*	Field Sport	Portland	-	-	-	1	-	-	-	-	-	1	18,600	8,600	1,490	8%	
Hilken Community Stadium	Field Sport	Portland	-	-	1	1	-	-	-	-	-	-	7,600	3,100	116	2%	
Total Average	14 Facilities			4	6	19	14	2	4	6	1	11	1	186,407	64,914	20,531	7%

Court Sport
Field Sport
Ice Facility
Aquatic Center
OTHER