

**Excerpts and  
topline findings**

# Expo Future Project Feasibility Study

Market Findings – Tasks 2 & 3

**DRAFT**

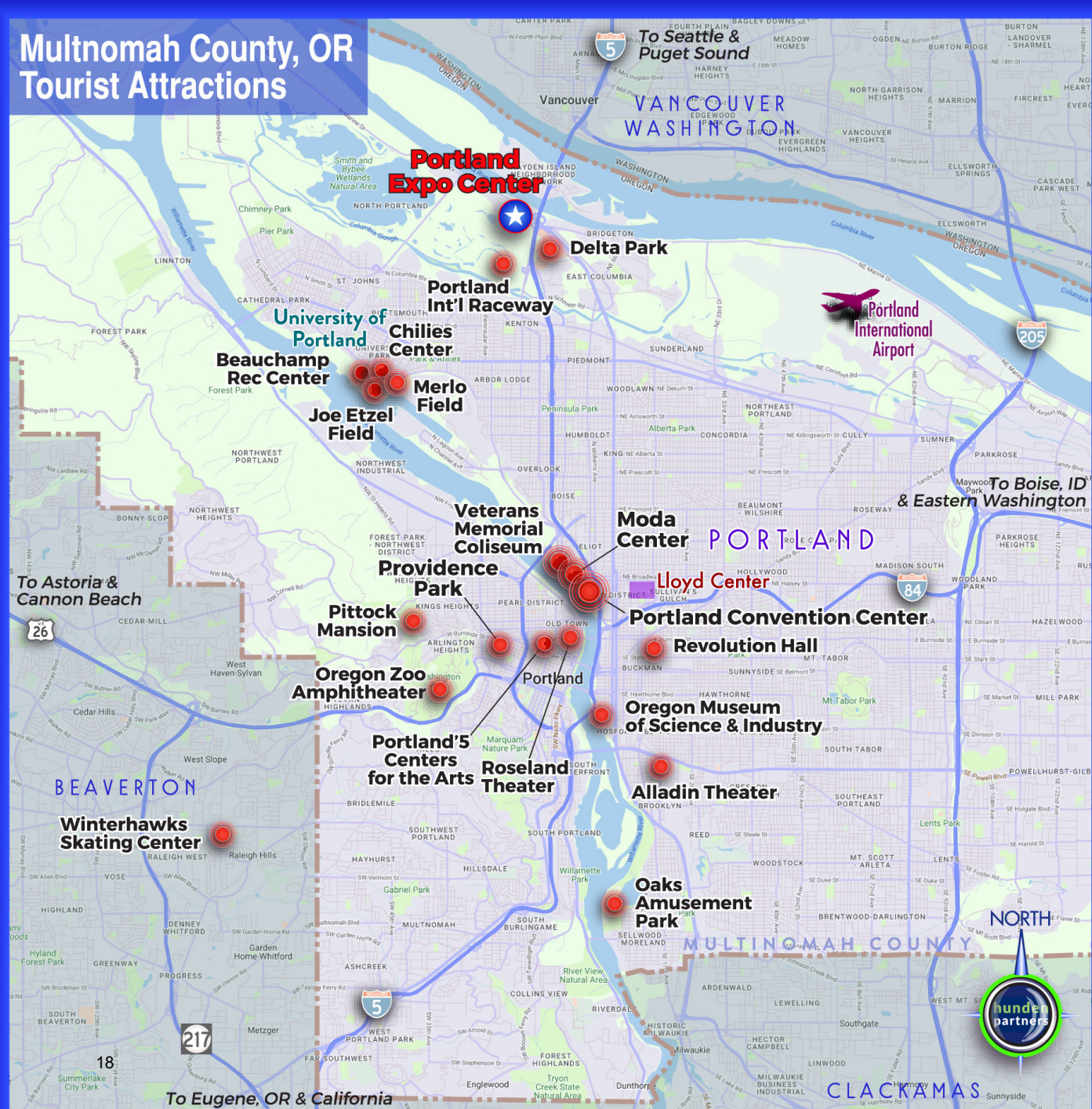
DECEMBER 8, 2023



# 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 7<sup>th</sup> in visitation.

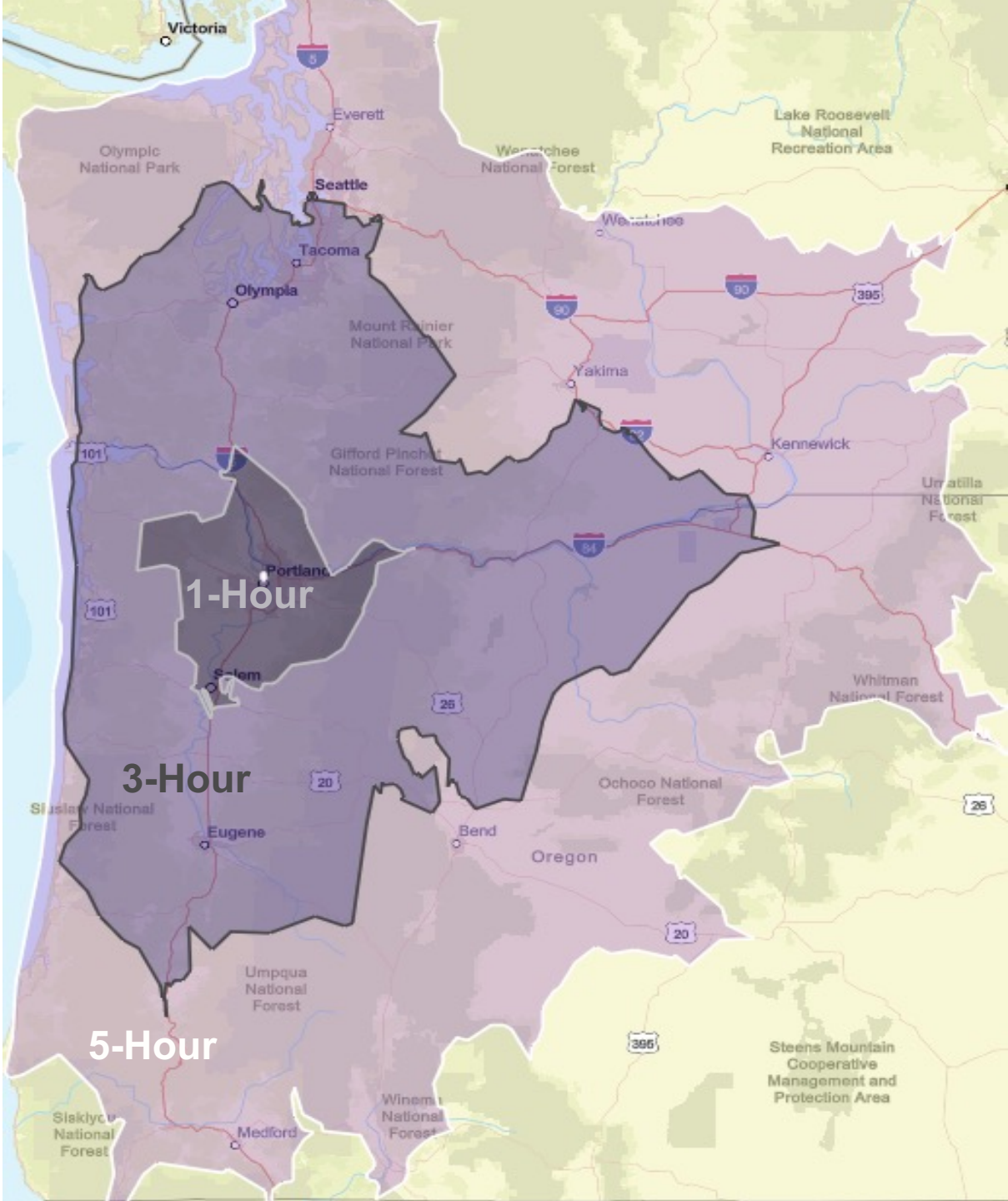
# Regional Drive Times

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%
<b>Total / Average</b>			<b>8,422,128</b>	<b>4,328,443</b>	<b>1.95</b>	<b>36%</b>	<b>64%</b>	<b>36%</b>	<b>28%</b>

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 spanning most of the vertical height of the slide.

# 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
<b>Moda Center</b>	Court Sport	Portland	1	-	-	-	-	-	-	2,430,000	1,402,600	16%
<b>Providence Park</b>	Field Sport	Portland	-	-	-	1	-	-	-	1,100,000	416,800	10%
<b>Veterans Memorial Coliseum</b>	Ice Facility	Portland	-	-	-	-	-	1	-	602,600	415,800	13%
<b>Portland International Raceway</b>	Other	Portland	-	-	-	-	-	-	-	401,600	208,100	18%
<b>Total / Average</b>	<b>4 Facilities</b>		<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1,133,550</b>	<b>610,825</b>	<b>14%</b>

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
<b>Average</b>	<b>45</b>	<b>9,140</b>	<b>83%</b>	<b>\$91</b>

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
<b>Average</b>	<b>13</b>	<b>5,776</b>	<b>74%</b>	<b>\$63</b>

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				
<b>Stoller Center*</b>	<b>Court Sport</b>	<b>Forest Grove</b>	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%
<b>PCC Rock Creek*</b>	<b>Field Sport</b>	<b>Portland</b>	-	-	4	2	6	-	-	-	217,700	64,300	11%
<b>Wheeler Sports Center*</b>	<b>Court Sport</b>	<b>Newberg</b>	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%
<b>Total / Average</b>	<b>19 Facilities</b>		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 (%)
<b>Delta Park - Owens Sports Complex</b>	Field Sport	Portland	-	-	7	9	-	-	-	-	-	692,900	238,100	110,000	16%
<b>Gordon Faber Recreation Complex</b>	Field Sport	Hillsboro	-	-	7	1	-	-	-	-	-	572,700	271,300	98,000	17%
<b>Winterhawks Skating Center</b>	Ice Facility	Beaverton	-	-	-	-	-	-	1	-	-	339,300	96,700	11,500	3%
<b>Lents Park</b>	Field Sport	Portland	-	-	3	2	2	-	-	-	-	280,200	117,400	31,100	11%
<b>Rose City Futsal East</b>	Court Sport	Portland	-	-	-	-	-	3	-	-	-	178,000	34,700	6,300	4%
<b>The Courts in Beaverton</b>	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%
<b>The People's Courts</b>	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%
<b>Total / Average</b>	<b>14 Facilities</b>		<b>4</b>	<b>6</b>	<b>19</b>	<b>14</b>	<b>2</b>	<b>4</b>	<b>6</b>	<b>1</b>	<b>11</b>	<b>186,407</b>	<b>64,914</b>	<b>20,531</b>	<b>7%</b>

\*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.