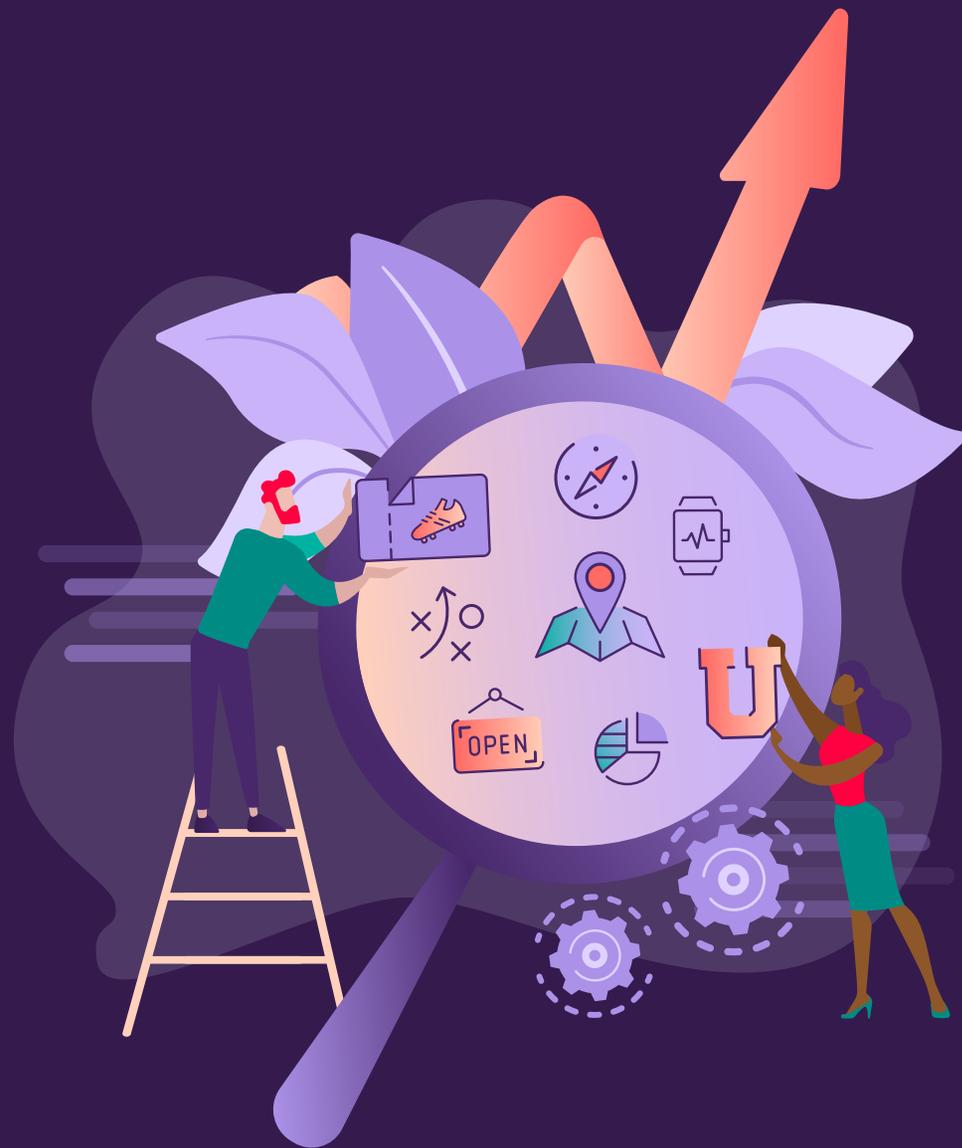


OREGON:  
**THE  
STATE OF  
SPORT**

The Economic Impact of the  
Athletic, Outdoor, Team, and  
Recreation Industries



# ACKNOWLEDGEMENTS



This effort would not have been possible without the broad and sustained support of the following organizations dedicated to promoting Portland and helping the region grow equitably, sustainably, and resiliently.



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Stacey M.L. Dodson, U.S. Bank

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- Sydney Mead
- Katie Mongue
- Ashley Odil



## Welcome to Oregon, the State of Sport.

As you'll read in the following pages, we are a global epicenter for the Athletic, Outdoor, Team, and Recreation ecosystem.

What we design, the world wears. That epic adventure? Those kicks? Those yoga pants? Wearable tech? Rugged backpacking gear? Those come from here.

But this economy is much more than business as usual; here, you can live your work and work your lifestyle. No place offers a greater opportunity to build your dream than our vibrant urban centers, paired with every possible natural pursuit across our staggeringly beautiful and diverse landscapes.

If you want to build a business, compete on a global stage, or handcraft a career in a place that embraces the competitiveness at the heart of human performance, you need to look no further than Oregon.

Game on.

**Andrew Hoan**  
President and CEO  
Portland Business Alliance

**Stacey M.L. Dodson**  
Market Executive—Oregon & SW Washington  
U.S. Bank

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Travel Portland  
Washington County Chamber of Commerce

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# INTRODUCTION



# INTRODUCTION

## CONTEXT

Oregon's Athletic, Outdoor, Team, and Recreation Ecosystem (the Ecosystem) is unparalleled in the United States. This report showcases that the state's competitive advantage is driven by the strength of its firms, teams, and talent; its incredible multitude of place-based assets; and its education and workforce systems.



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

Many of the world's most beloved sports apparel companies design, manufacture, and distribute a range of apparel, footwear, gear, and accessories in Oregon. These brands include major sporting goods producers like Nike Inc., Columbia Sportswear, Adidas, Metolius Climbing, Danner, Keen, Leatherman, Hydro Flask, and On Running; and other apparel and textile producers such

as Pendleton Woolen Mills. There is also a rich history of startups and spinoff brands based on the talent and resources in the region, such as Looptworks, a mission-driven Portland

## Oregon's Athletic, Outdoor, Team, and Recreation Ecosystem is a powerful economic engine.

upcycling company; Tactics, a Eugene-based skate and snowboard shop; and Hydro Flask, the Bend-based water bottle maker. Together, these employers, and many more throughout the state, serve a consumer base ranging from the world's elite athletes to casual consumers, and drive innovation in the sports and apparel world.

Oregon also has a robust combination of professional sports, sporting events, and a variety of outdoor destinations across the region. It's one of the very few states that can offer it all: 363 miles of coastline, lush forests, high deserts, and mountain peaks—all within proximity to major urban areas and

residents. The local community and visitors support teams and rally around sporting events for the Portland Trail Blazers, Portland Timbers, Thorns, and more.

Unique athletic events attract visitors from afar—for example, the annual 199-mile Hood to Coast is the most popular running and walking relay race in the world, attracting 12,000 participants. The Pole Pedal Paddle, a relay race that includes alpine skiing/snowboarding, cross country skiing, biking, running, canoeing/kayaking/stand-up paddle boarding, and sprinting, draws 3,100 people annually to Bend. And in July 2022, the World Athletics Championships will hold its first-ever event on U.S. soil in Eugene. The competition attracts the world's best track & field athletes from over 200 countries.

In sum, the state's strong and rapidly growing Athletic, Outdoor, Team, and Recreation Ecosystem creates a unique environment for innovation and growth for sports and apparel employers; offers an unparalleled array of employment opportunities for top talent in this sector; drives quality of life for Oregonians and visitors interested in professional sports and outdoor recreation; and serves as a powerful economic engine.

# INTRODUCTION



## ABOUT THE REPORT

The Portland Business Alliance convened a regional and state-wide coalition of public and private enterprises to retain HR&A Advisors, an economic development consulting firm, to conduct the most robust report to date of Oregon’s “Athletic, Outdoor, Team, and Recreation Ecosystem”—defined as including sports and apparel companies as well as sporting-related Events, Recreation, and Tourism activities. While the Ecosystem spans a state that has a number of communities with a strong foothold in this space, this initial report defines the “Study Area” as Greater Portland, Bend, and Eugene, with a deeper dive into the dynamics of Greater Portland.

This report focuses on trends in 2019, prior to the COVID-19 pandemic. The pandemic had a significant impact on the Ecosystem—particularly sporting events, recreation, and tourism—as it did on many sectors. The authors of this report are confident that these sectors are likely to recover to pre-pandemic levels given the region’s robust sporting culture, and have therefore focused on pre-pandemic conditions for analysis. In some places, data from 2020 and 2021 has been provided for additional context.



Crown Zellerbach Trail. Credit: Andrea Johnson Photography, Travel Portland



Weinstein PR

SPORTING ECOSYSTEM



# INTRODUCTION (Cont'd)

## OVERVIEW OF FINDINGS

### TOP FINDINGS FROM THE "OREGON: THE STATE OF SPORT" INCLUDE:

The Ecosystem is a massive economic force:

- The Ecosystem in the Study Area comprises 51,000 jobs.
- For every one job in the Ecosystem, an additional 1.55 jobs are created in the economy, supporting a total of 130,000 jobs, or 9% of jobs in Greater Portland—larger than either the professional services or accommodation & food services sectors. Further, the Ecosystem supports \$29B per year in economic output, including both direct and spinoff economic impacts.
- The Ecosystem is growing more rapidly than the region's economy as a whole. Between 2010 and 2019, it grew by 56% in Greater Portland, compared to only 21% growth in jobs across all sectors.
- While major headquarters are an important driver of employment, 83% of the Greater Portland Ecosystem's 3,100 businesses are small businesses with 20 employees or fewer.
- The Ecosystem generates significant tax revenues, including \$976M/year to the state of Oregon.

Despite its smaller population size, Greater Portland's Ecosystem outpaces other athletic and outdoors-focused regions in the country—Greater Salt Lake City, Seattle, and Denver—and has a **robust supply of creative talent:**

- Greater Portland's Ecosystem is larger by comparison and is growing more rapidly than in the Salt Lake City, Seattle, and Denver regions.
- Greater Portland also contains a larger concentration of highly skilled creative workers in design-related occupations, which are growing more quickly—by 60% between 2010 and 2019—than in these comparison regions.
- A robust array of educational programs across the state contribute to the talent pipeline. For example, Pensole Footwear Design Academy is a footwear

design school created in Portland with partnerships at schools across the nation. The University of Oregon in Eugene has a Human Physiology department with a dedicated focus area in sports and fitness; its Warsaw Sports Marketing Center is the first program of its kind in the U.S. focused on Sports Business, and the university's Portland campus features Sports Product Design and Sports Product Management master's degree programs. Oregon State University is home to the Center for the Outdoor Recreation Economy, and its Cascades campus in Bend offers an interdisciplinary Outdoor Products degree program.

The Ecosystem supports \$29B per year in economic output.

Manufacturing sectors in the Ecosystem offer quality jobs for workers:

- Workers in Ecosystem-related manufacturing earn higher annual wages than the regional average: \$77K vs. \$66K, respectively. Only 15% of these workers have a college degree, as compared to 43% of Greater Portland workers as a whole.

**51,000**  
**JOBS**

Number of jobs in the Ecosystem Study Area, Greater Portland, Eugene, Bend

# LAND ACKNOWLEDGEMENT

The sponsors of this study honor and acknowledge Oregon's nine federally recognized tribes who have stewarded these lands since time immemorial:

## **THE KLAMATH TRIBES OF OREGON**

of the Southern Oregon plateau

---

## **BURNS PAIUTE INDIANS**

of the high-desert east

---

## **COQUILLE INDIAN TRIBE**

of Southern Oregon's coastal forests

---

## **CONFEDERATED TRIBES OF THE GRAND RONDE COMMUNITY OF OREGON**

in the northern coast range

---

## **COW CREEK BAND OF UMPQUA TRIBE OF INDIANS**

in the Southern Oregon foothills

---

## **CONFEDERATED TRIBES OF THE UMATILLA INDIAN RESERVATION**

in the Blue Mountains

---

## **CONFEDERATED TRIBES OF THE SILETZ INDIAN RESERVATION**

in Oregon's northern rainforests

---

## **CONFEDERATED TRIBES OF COOS, LOWER UMPQUA, AND SIUSLAW INDIANS OF OREGON**

on the windblown southern coast

---

## **CONFEDERATED TRIBES OF THE WARM SPRINGS INDIAN RESERVATION OF OREGON**

on the sunny eastern slopes of the Oregon Cascades

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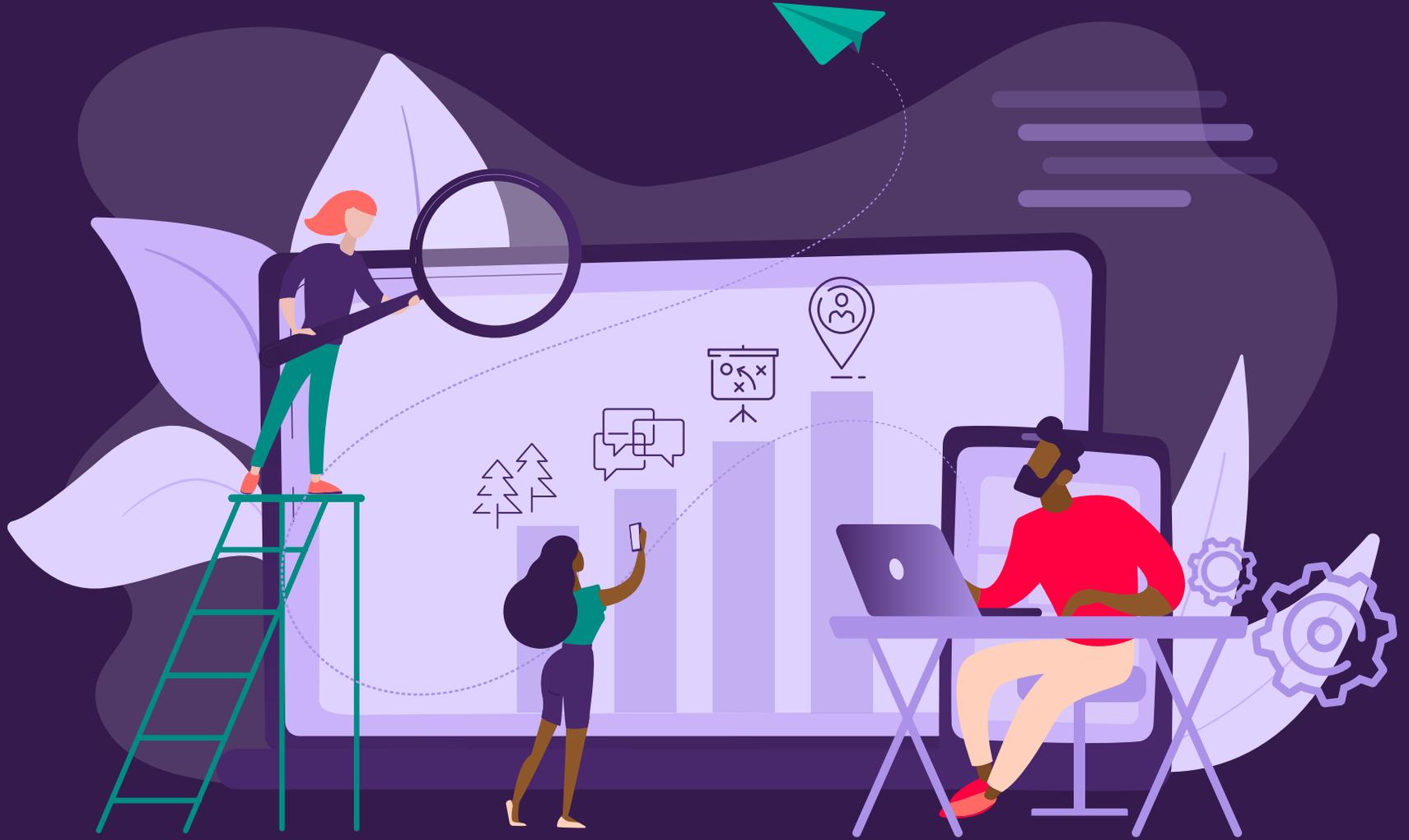


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SPORTING ECOSYSTEM



# ECOSYSTEM OVERVIEW



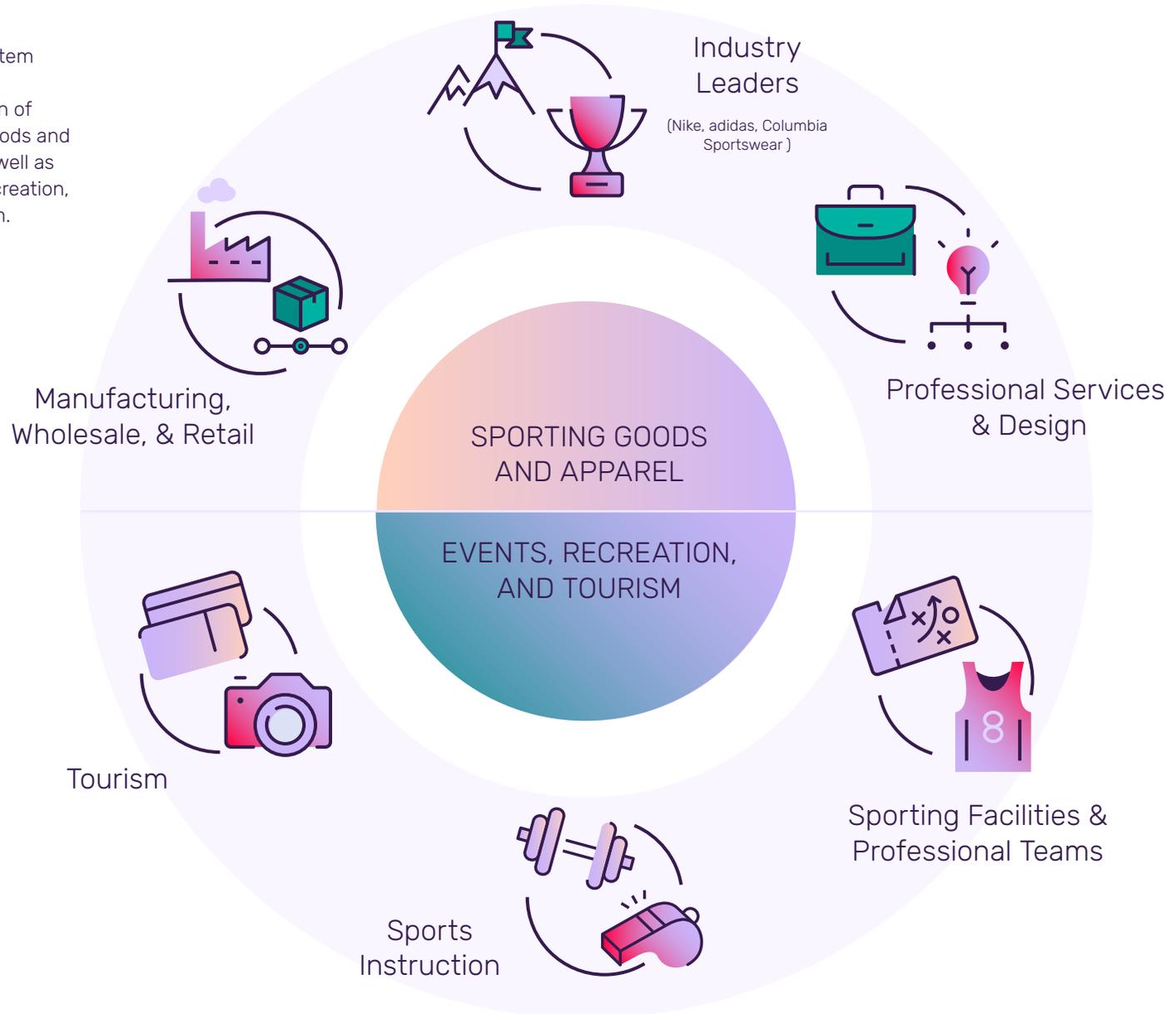
ECOSYSTEM OVERVIEW

# THE ECOSYSTEM'S SCALE AND IMPACT



# ATHLETIC, OUTDOOR, TEAM, AND RECREATION ECOSYSTEM DEFINITION

The Ecosystem includes a combination of sporting goods and apparel as well as Events, Recreation, and Tourism.



# SUPPORTIVE SERVICES

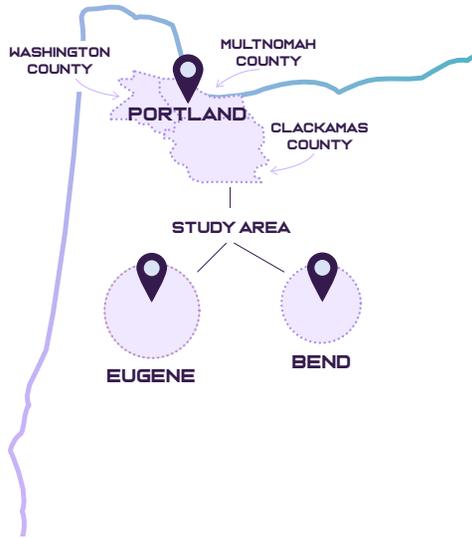
The Ecosystem also supports an array of jobs in secondary supportive service industries.



THE ECOSYSTEM'S SCALE AND IMPACT

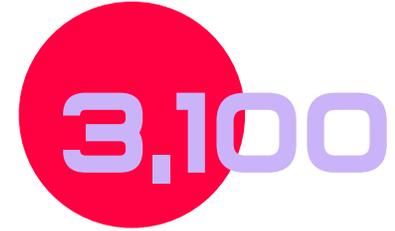
# SIZING THE ECOSYSTEM

The Study Area includes 51,000 Ecosystem workers, including 43,000 in Greater Portland and an additional 8,000 jobs in Bend and Eugene. In these geographies, the Ecosystem's growth outpaces that of the region overall.



**51K**  
**JOBS**  
**IN THE ECOSYSTEM**

in the Study Area (2019)  
 43K in Greater Portland



**3,100**  
**BUSINESSES**  
**IN THE ECOSYSTEM**

in the Study Area (2022)  
 2,200 in Greater Portland



# 50%

**2010-2019 JOB GROWTH**  
**IN THE ECOSYSTEM**

in the Study Area compared to **21%** overall

**56%** Job growth in the Ecosystem  
 within Greater Portland

Source: EMSI, Reference USA

THE ECOSYSTEM'S SCALE AND IMPACT

# ECONOMIC IMPACTS OF THE ECOSYSTEM

The Ecosystem creates significant economic activity for the Study Area and the state of Oregon. Total jobs supported by the Ecosystem in the Study Area include 51,000 direct jobs and 79,000 spinoff (indirect and induced) jobs, for a total of 130,000 jobs with \$29B in economic output. Further, direct economic activity in the Ecosystem generates almost \$1B in annual tax revenues to the state of Oregon.



## DIRECT, INDIRECT, AND INDUCED JOBS

**9%** of the Study Area's total jobs

Larger than either the Professional Services or Accommodation & Food Services sectors

Each direct job creates **1.55** additional jobs



## DIRECT, INDIRECT, INDUCED ECONOMIC OUTPUT

Each \$ of direct economic output creates **\$1.07** of additional economic output



## ANNUAL TAX REVENUE TO THE STATE OF OREGON<sup>1</sup>

Equivalent to the educational costs of 73,000 students<sup>3</sup>

Source: HR&A Analysis of 2019 EMSI data.

Note: Indirect jobs and economic activity are generated by business-to-business spending. Induced jobs are generated by worker-to-business spending. Economic output measures the value of all sales of goods and services.

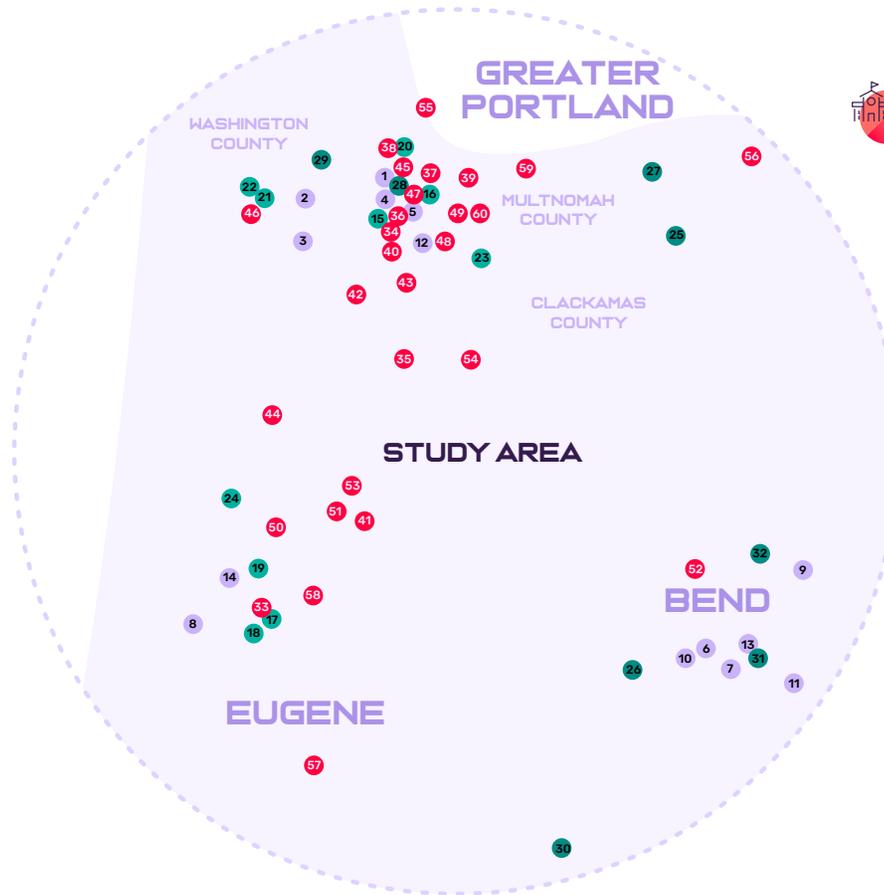
<sup>1</sup>Annual tax revenue to the state of Oregon includes personal income tax, corporate excise tax, and an estimate of what the corporate activity tax would have been if it had been in effect in 2019.

<sup>2</sup>Oregon Department of Education, Oregon Statewide Report Card 2020-2021. "Operating Costs Per Student" is a figure considering Direct Classroom, Classroom Support, Building Support, and Central Support.

# THE ECOSYSTEM'S SCALE AND IMPACT

## ECOSYSTEM MAP

Economic ecosystems are made up of an array of People, Place, and Program assets that interconnect and reinforce one another to create a dynamic environment that is more than the sum of its parts. The Ecosystem's assets span across the state. "People" include companies and institutions and the people who work for them; "Place" includes sports venues and other physical assets such as outdoor destinations; and "Program" includes educational institutions and other programming.



### PEOPLE

MAJOR SPORTING GOODS EMPLOYERS:

1. adidas
2. Columbia Sportswear
3. Nike
4. On Running
5. Pendleton Woolen Mills
6. Hydro Flask
7. Cairn
8. Keen
9. SnoPlanks
10. Ruffwear
11. BlackStrap
12. Showers Pass
13. Silipint
14. Tactics



### PLACE

SPORTING VENUES:

15. Providence Park
16. Moda Center
17. Matthew Knight Arena
18. Hayward Field
19. Autzen Stadium
20. Portland International Raceway
21. Hillsboro Stadium
22. Ron Tonkin Field
23. Walker Stadium
24. Reser Stadium

### OUTDOOR RECREATION:

25. Mt. Hood
26. Mt. Bachelor
27. Columbia River Gorge
28. Willamette River
29. Forest Park
30. Crater Lake National Park
31. Bend Whitewater Park
32. Smith Rock State Park



### PROGRAM

EDUCATIONAL INSTITUTIONS:

33. Oregon State University
34. Oregon Health & Science University
35. Oregon Institute of Technology
36. Portland State University
37. University of Oregon
38. University of Portland
39. University of Western States
40. American College of Healthcare Sciences
41. Corban University
42. George Fox University
43. Lewis & Clark College
44. Linfield University
45. Pacific Northwest College of Art
46. Pacific University
47. Pensole Footwear Design Academy
48. Reed College
49. Warner Pacific University
50. Western Oregon University
51. Willamette University
52. Central Oregon Community College
53. Chemeketa Community College
54. Clackamas Community College
55. Clark College (Vancouver, WA)
56. Columbia Gorge Community College
57. Lane Community College
58. Linn-Benton Community College
59. Mt. Hood Community College
60. Portland Community College

THE ECOSYSTEM'S SCALE AND IMPACT

# ECONOMIC IMPACT OF PROFESSIONAL SPORTS TEAMS AND EVENTS

The professional sports franchises have an enormous economic impact as demonstrated in the numbers and they punch above their weight in market value. In addition to these figures, sports teams and all of the events that facilities beget, play an outsized role in recruiting for jobs and for quality of life for the workforce in the ecosystem. Because of the national and international media Portland gets because of its teams, this part of the ecosystem is vital for the reputational aspects of the study area.

- > **PORTLAND TRAIL BLAZERS** rank **13th** in value among NBA franchises at **\$2.05B** even though Greater Portland ranks as the **19th** largest market.<sup>1, 2</sup>
  - 2,700 Direct, indirect and induced jobs by the Trail Blazers and the Moda Center
  - \$46M Tax revenue to the state of Oregon
  
- > **2022 WORLD ATHLETICS CHAMPIONSHIPS**
  - Expected to generate \$52M in direct spending by visitors, \$138M from goods and services<sup>3</sup>

<sup>1</sup> Forbes, 2021.

<sup>2</sup> Hoop Social, 2022.

<sup>3</sup> Portland Business Journal.

<sup>4</sup> Economic and fiscal impacts of the Portland Trail Blazers and Moda Center were estimated by ECONorthwest on behalf of the Portland Trail Blazers in 2019. Annual tax revenue to the State of Oregon includes personal income tax and corporate excise tax.

## PORTLAND TRAIL BLAZERS AND THE MODA CENTER

The Portland Trail Blazers and Moda Center generate significant economic and fiscal impacts to the state, including nearly half a billion dollars in economic output.<sup>4</sup>



### ANNUAL EVENT IMPACTS (NET)



### ANNUAL ONGOING IMPACTS OF OPERATIONS (GROSS)



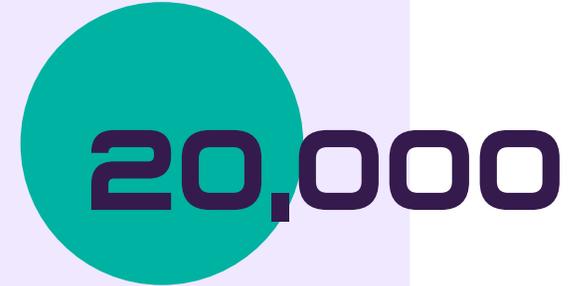
THE ECOSYSTEM'S SCALE AND IMPACT

# ECONOMIC IMPACT OF PROFESSIONAL SPORTS TEAMS AND EVENTS (Cont'd)

- > **PORTLAND TIMBERS** rank **7th** in value among MLS franchises at **\$635M** even though Greater Portland ranks as the **19th** largest market.<sup>1</sup>
  - 300+ long term jobs
  
- > **PORTLAND THORNS** The most successful and well supported professional women's franchise in the world, with pre-COVID attendance of nearly 20,000 fans per game
  
- > **PROVIDENCE PARK** Hosts 200+ events per year; 25.2K stadium capacity
  - Nearly 1M guests annually
  - \$85M stadium renovation in 2019



**PORTLAND TIMBERS**  
**ANNUAL ECONOMIC IMPACT**  
 Estimated.<sup>2</sup>



**PORTLAND THORNS**  
**FANS PER GAME**  
 Estimated. Pre-Covid



**PROVIDENCE PARK**  
**GUESTS ANNUALLY**

<sup>1</sup> Axios, 2021.

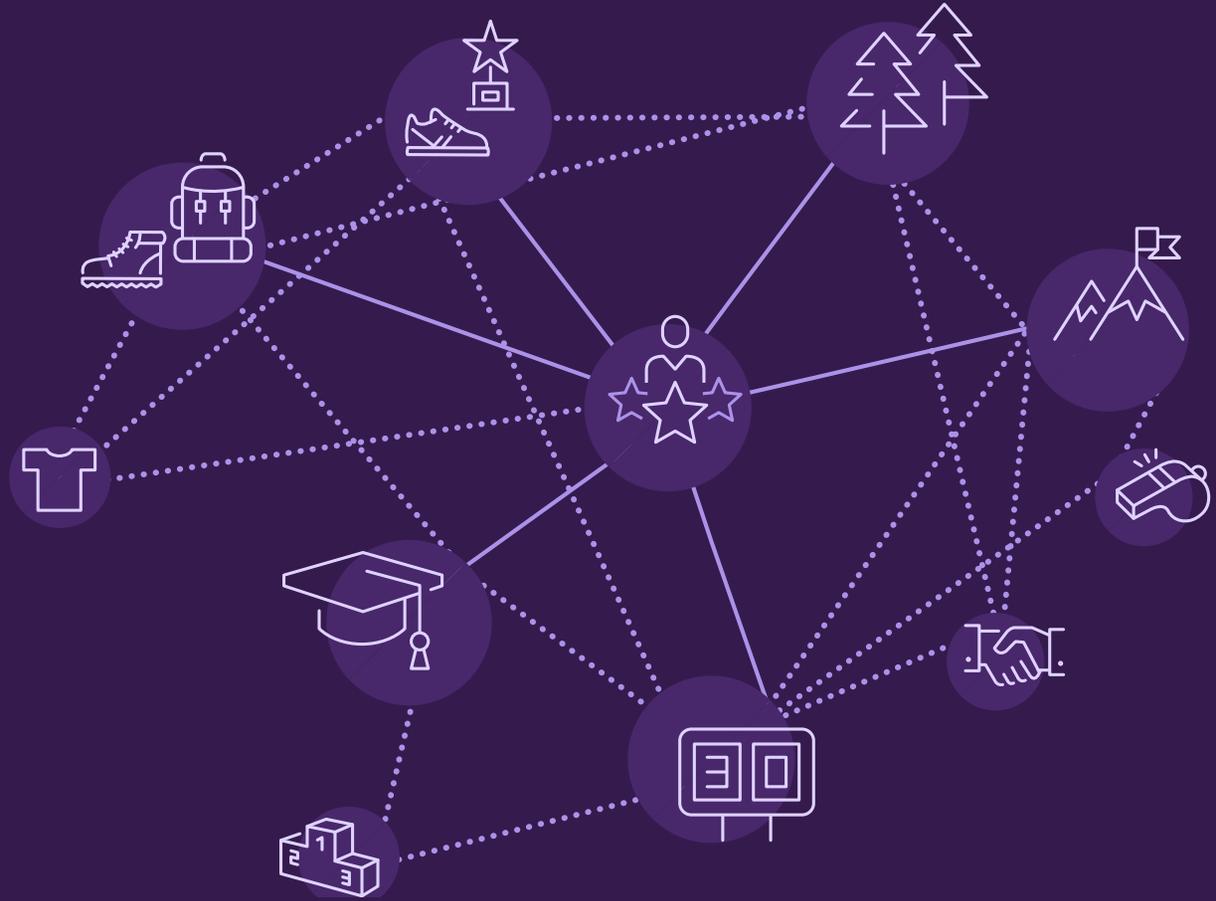
<sup>2</sup> 2009 Daily Journal of Commerce

# THE ECOSYSTEM'S VALUE PROPOSITION



THE ECOSYSTEM'S VALUE PROPOSITION

# OVERVIEW



# OVERVIEW OF OREGON'S ATHLETIC, OUTDOOR, TEAM, AND RECREATION VALUE PROPOSITION

The Study Area's many assets create a robust value proposition for the Ecosystem that drives its unique competitive position and growth. This section summarizes the People, Place, and Program assets that underpin the Ecosystem's strengths, based on interviews with over 20

organizations in the Ecosystem. In short, the Ecosystem's competitive advantage is driven by the strength of employers, teams, and talent; its multitude of sports venues and recreational assets; quality of life; and robust educational and economic development institutions.



## PEOPLE

- Strong Talent Pool
- Sporting Goods and Apparel Companies (design, manufacturing, retail)
- Sports Teams

## PLACE

- Sports Venues
- Outdoor Recreation and Tourist Destinations
- Quality of Life and Brand
- Nodes in Bend and Eugene

## PROGRAM

- Universities and Colleges
- Workforce Training Programs
- Economic Development Groups
- Tourism Organizations
- Youth Sports

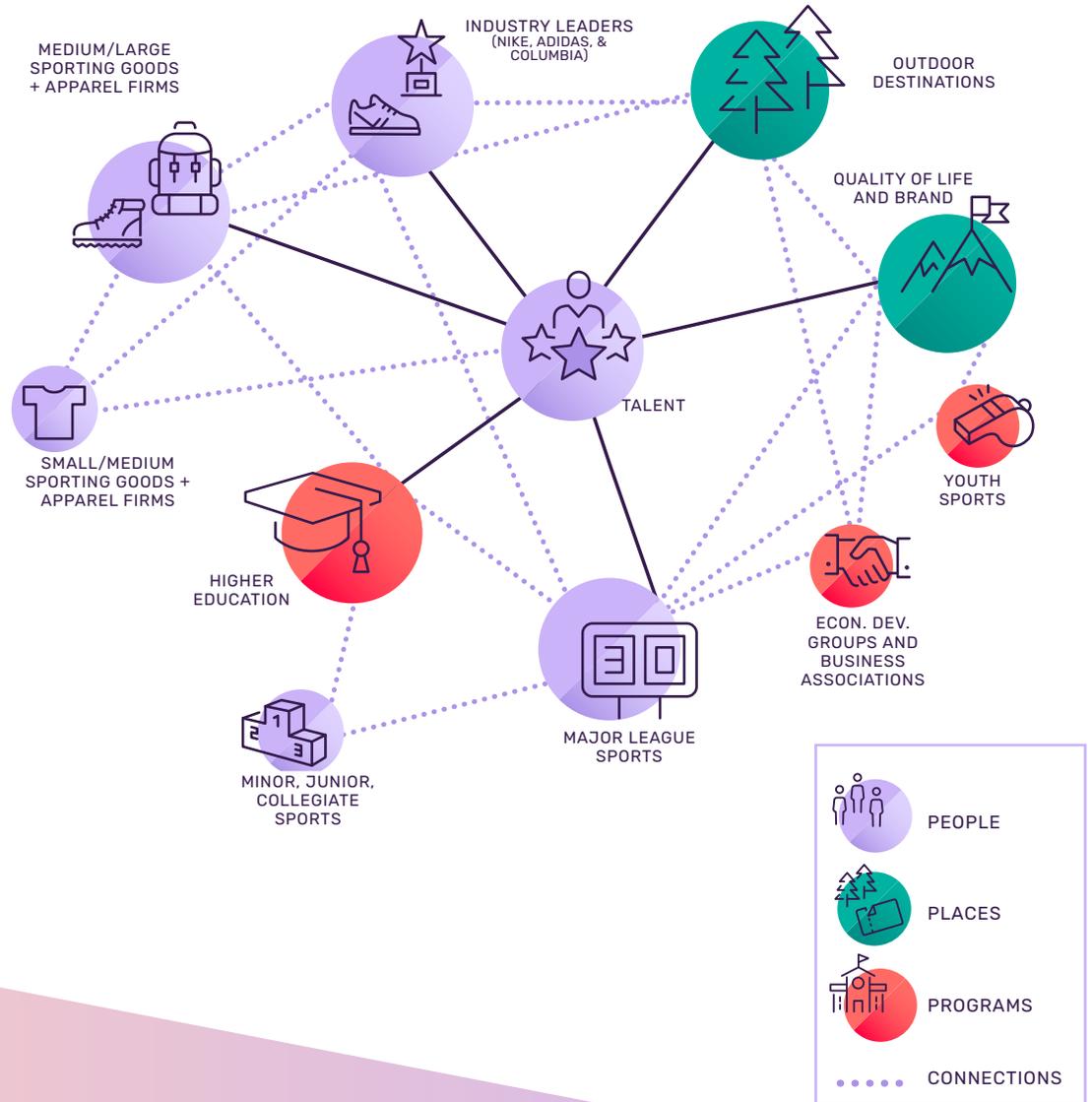
**= VALUE PROP**



# AN INTERCONNECTED ECOSYSTEM OF ASSETS

Synergies and connections between People, Place, and Program assets create an ecosystem that is greater than the sum of its parts. At the center of these relationships is a strong talent pool, which attracts and supports employers of all sizes. In a symbiotic relationship, talent is attracted to the Study Area due to robust job opportunities and sports-focused training available at higher education institutions across the state. Further, quality of life and brand—created by a strong athletic and recreation culture, major sports teams and events, and outdoor destinations—underpins talent attraction and growth.

There are synergies between other assets as well. Higher education institutions channel talent to sports teams. The sporting goods companies and minor and major sports teams collaborate with and support one another's success. Non-athletic apparel firms are founded and grow, drawing upon local talent. A robust youth sports culture further supports quality of life and brand. Economic development groups and associations further help to foster interconnections and partnerships that promote the Ecosystem.



THE ECOSYSTEM'S VALUE PROPOSITION

# PEOPLE



# PEOPLE: TALENT POOL



Companies in the Study Area enjoy recruiting from an unparalleled industry-trained talent pool. Talent was the #1 Ecosystem asset cited by all interviewees.

**6x** REGIONAL WORKFORCE  
growing at 6x national average

- > **COMPANIES DRAW FROM A STRONG TALENT POOL.**  
The region can import top-tier talent attracted by quality of life and the prospect of strong career pathways in the Ecosystem.
- > **COMPANIES RECRUIT FROM OTHER LOCAL COMPANIES** with confidence in their training and experience. "Poaching" occurs in both directions between larger and smaller firms and at every position level.
- > **TALENT PIPELINES FROM ESTABLISHED, LOCAL DEGREE PROGRAMS** prepare young professionals for careers in the Ecosystem.
- > **PORTLAND IS A MAGNET FOR YOUNG TALENT.** The metro area is among the top 15 cities selected by young Americans 18-24 years old when asked where they would most like to live after college.



- 01. Nearly 50% of the labor pool with degrees in science/engineering, compared to 44% nationwide
- 02. In 2021 Portland ranked as the #1 best place to live on the West Coast and #10 in the U.S.<sup>1</sup>
- 03. Portland ranks #11 on the Next Cities Index of places to live for college graduates.<sup>2</sup>
- 04. Regional workforce growing at six times the national average

<sup>1</sup> U.S. News, 2021

<sup>2</sup> Axios, 2022

# PEOPLE: SPORTING AND APPAREL COMPANIES



A wide range of sporting and apparel companies thrive in the Study Area alongside and because of one another.

- > **A DYNAMIC MIX OF SPORTS AND APPAREL COMPANIES OF ALL SIZES** thrive in the region, from anchors and headquarters to startups and entrepreneurs, trading and cultivating talent and shared resources.
- > **COMPANIES SHARE SERVICES IN RELATED INDUSTRIES** such as creative marketing, business management, accounting and financial services, and legal services that specialize in sports-related work.
- > **AN ECOSYSTEM OF MAJOR AND MINOR TEAMS ACROSS SPORTS FUEL ONE ANOTHER'S BUSINESSES** by justifying higher ticket prices and sharing fan bases.

## SPORTING GOODS AND APPAREL COMPANIES

The region's concentration of 500-800' or more sporting apparel and equipment companies.

01. Nike (Global HQ)
02. adidas (Co-Global Headquarters)
03. Columbia Sportswear (HQ)
04. On Running (North American HQ)
05. Under Armour (global innovation hub)
06. Keen (HQ and production)
07. Hydro Flask (HQ)
08. Pendleton Woolen Mills
09. Showers Pass
10. Tactics
11. Danner
12. The Clymb
13. Leatherman (HQ)
14. Snow Peak

## PROFESSIONAL TEAMS

15. Timbers (MSL)
16. Thorns (NWSL)-best attendance in the NWSL
17. Trail Blazers (NBA)
18. Hillsboro Hops
19. Winterhawks
20. Portland Pickles

## ACTIVE FRANCHISE RECRUITMENT

21. Portland Diamond Project (MLB)
22. Women's National Basketball Association (WNBA)



Timbers. Credit: Ashley Anderson, Travel Portland

<sup>1</sup>Athletic and Outdoor, Building a Strategic Plan for the Industry, 2017; Metro and Greater Portland Inc., Greater Portland Comprehensive Economic Development Strategy, 2021.



THE ECOSYSTEM'S VALUE PROPOSITION

# PLACE



## PLACE: EVENTS



A range of professional sporting events and facilities serve residents and attract visitors to the Study Area.

- > **THE STUDY AREA HOSTS ESTABLISHED EVENTS AND VENUES** that continuously draw strong local and tourist attendance.
- > **MINOR LEAGUE TEAMS LEVERAGE THE PRESENCE OF MAJOR LEAGUE SPORTS** to rank among the most competitive minor league franchises in their respective sports.
- > **LOCAL COMPANIES SPONSOR AND BUY SEASON TICKETS** for local sports teams.
- > **PRESENCE OF SUBSTANTIAL COLLEGIATE FACILITIES AND STADIUMS**

### TEAM STADIUMS AND EVENT FACILITIES

01. Providence Park (capacity: 25K)
02. Moda Center (20K)
03. Portland International Raceway (30K)
04. Hillsboro Stadium (8K)
05. Ron Tonkin Field (5K)
06. Walker Stadium (2K)
07. College stadiums: Autzen Stadium, Reser Stadium, Hayward Field, Matthew Knight Arena, Gill Coliseum, PK Park, Goss Stadium, Jane Sanders Stadium, Kelly Field, UO Softball field and OSU Softball field

### EVENTS

08. Cycle Oregon
09. Hood to Coast
10. Phil Knight Invitational
11. Prefontaine Classic
12. Portland Trail Series
13. Starlight Run
14. Portland Marathon
15. Eugene Marathon
16. Seaside Beach Volleyball Tournament

### ATHLETIC AND RECREATION CLUBS

17. Multnomah Athletic Club (22,000 members)
18. Evergreen Curling Club (one of six in the continental U.S.)



Providence Park. Credit: Ashley Anderson, Travel Portland

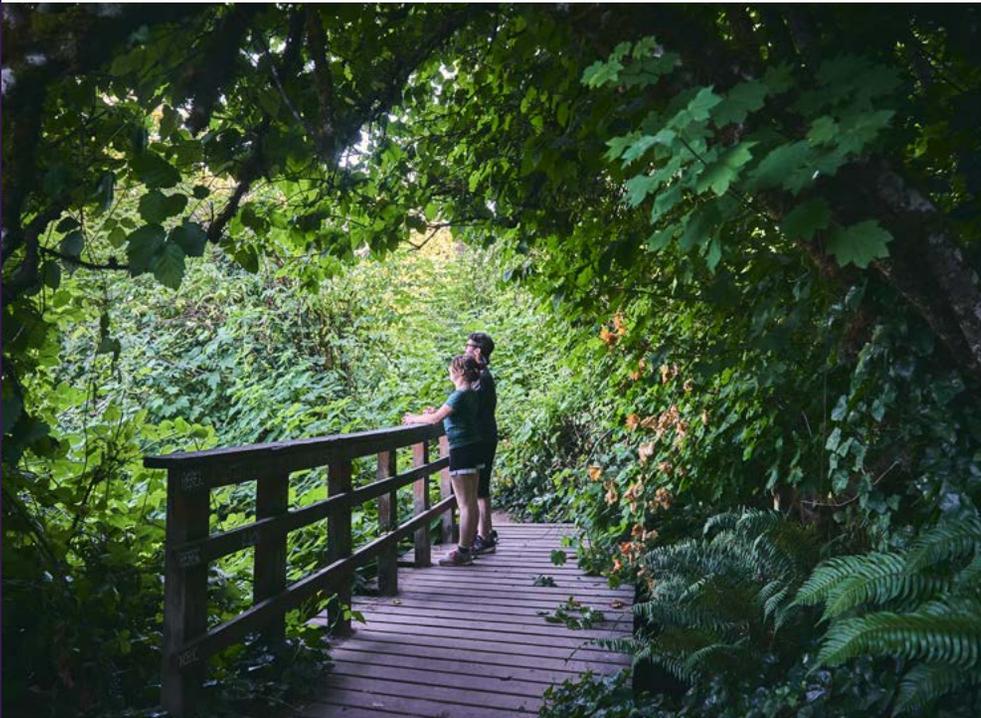
## PLACE: OUTDOOR DESTINATIONS



Residents and tourists enjoy a unique natural landscape that allows them the proximity to surf, hike, or snowboard on any given day.

- > **PROXIMITY TO THE OREGON COAST AND HIGH DESERT** allows for easy access to a full spectrum of outdoor activities.
- > **MOUNTAIN RANGES** are a short drive away, offering historic lodges and board sports. The Timberline Freestyle Training Center on Palmer Glacier has the longest ski and snowboard season in North America.

- > **LOCAL AND REGIONAL PARKS AND TRAIL SYSTEMS** provide respite and recreation in residents' backyards.
- > **EMPLOYEES PARTAKE IN THE OUTDOORS**, bringing consumer expertise to product design and development.



Forest Park, Hikers on the Bridge. Credit: Aaron Lee, Travel Portland

### DESTINATIONS AND SITES

01. Forest Park
02. Willamette River
03. Deschutes River
04. Hood River
05. Columbia River Gorge
06. Mt. Hood
07. Timberline Lodge
08. Skibowl
09. Mt. Hood Meadows
10. Mt. Bachelor
11. Oregon Coast
12. Bend Whitewater Park



## PLACE: QUALITY OF LIFE



Residents enjoy a nationally recognized quality of life and culture in Portland, Eugene, and Bend.

- > **CITIES AND NEIGHBORHOODS ARE WELL CONNECTED** with walkable districts, a network of bike paths, and a comprehensive public transit system. Portland's Tilikum Crossing is the largest car-free bridge in the U.S.
- > **AMPLE OPEN SPACE AND PARKS ARE HIGHLY VALUED BY RESIDENTS AND VISITORS ALIKE.** Portland has over 12,500 acres of parks; Eugene has another 3,100 acres; and Bend has more than 2,600 acres.

- > **THE VALUES-DRIVEN CULTURE OF THE PACIFIC NORTHWEST** draws residents, visitors, talent, and companies to an area with a proud heritage of environmental stewardship done in service of helping people connect with and enjoy the outdoors.
- > **THE REGIONAL PRODUCE, AND CULINARY SCENE** is enjoyed by locals while attracting a strong base of tourists. Portland is well-known for its local restaurants, while Bend is a worthwhile brewery destination.



Running on Tom McCall Waterfront. Credit: Justin Katigbak, Travel Portland

01. High-quality public realm and walkability
02. Robust bike infrastructure and public transit
03. Significant open space and diverse recreational activities
04. Unique sports and outdoors culture
05. Nationally recognized culinary scene and regional produce

## PLACE: BEND



Bend has a long-standing reputation as a close-knit outdoor community and is now attracting a growing number of small startups.

- > **OUTDOOR ATTRACTIONS, LIFESTYLE, AND COMMUNITY** make Bend a unique place to live and work.
- > **FOUNDERS AND TALENT ARE MOVING TO BEND**, attracted by quality of life and brand.
- > **SMALL SPORTING GOODS COMPANIES AND TECH STARTUPS** are growing, and employers know they can attract top talent from the West Coast and elsewhere due to Bend's unique offerings.
- > **OSU'S CASCADES CAMPUS** offers an Outdoor Products program.



### SPORTING GOODS AND APPAREL COMPANIES

01. Hydro Flask HQ
02. Cairn
03. Free Range Equipment
04. SnoPlanks
05. Ruffwear
06. BlackStrap
07. Silipint

### OUTDOOR RECREATION

08. Mt. Bachelor
09. Smith Rock State Park
10. Deschutes River
11. 300+ miles of mountain biking trails

### TECH STARTUPS

12. Creative Coding
13. Alpine Internet

### HIGHER EDUCATION

14. OSU's Cascades campus and Center for the Outdoor Recreation Economy



THE ECOSYSTEM'S VALUE PROPOSITION

# PROGRAM



## PROGRAM: EDUCATION AND WORKFORCE



The Ecosystem is supported by strong educational assets, which foster talent and offer opportunities to address diversity and equity gaps.

- > **RECOGNIZED FOUR-YEAR DEGREE PROGRAMS PREPARE GRADUATES FOR CAREERS IN THE ECOSYSTEM.**
- > **THE STUDY AREA HAS A DISTRIBUTED NETWORK OF COMMUNITY COLLEGES** in proximity to these four-year universities for more cost-effective education and training.

### WORKFORCE SYSTEMS

01. Worksystems
02. Partners in Diversity
03. East Cascades Works
04. Lane Workforce Partnership

### UNIVERSITIES AND COLLEGES

(28 colleges and universities within 50 miles of the city's center):

05. Oregon State University
06. Oregon Health & Science University
07. Oregon Institute of Technology
08. Portland State University
09. University of Oregon
10. University of Portland
11. University of Western States
12. American College of Healthcare Sciences
13. Corban University
14. George Fox University
15. Lewis & Clark College
16. Linfield University
17. Pacific Northwest College of Art
18. Pacific University
19. Pensole Footwear Design Academy
20. Reed College
21. Warner Pacific University
22. Western Oregon University
23. Willamette University
24. Central Oregon Community College
25. Chemeketa Community College
26. Clackamas Community College
27. Clark College (Vancouver, WA)
28. Columbia Gorge Community College
29. Lane Community College
30. Linn-Benton Community College
31. Mt. Hood Community College
32. Portland Community College

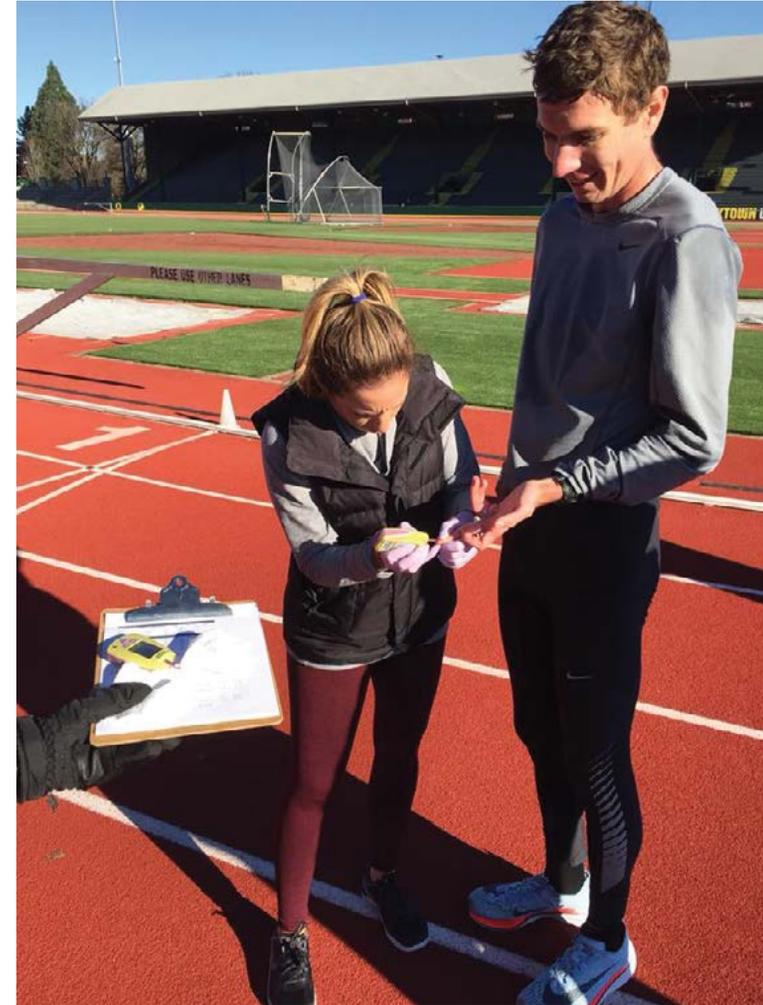


## PROGRAM: EUGENE



Eugene, particularly the University of Oregon, is a major generator of talent for the Athletic, Outdoor, & Recreation Ecosystem.

- **UNIVERSITY OF OREGON** produces the largest number of graduates in the state with degrees in Ecosystem-related fields, such as Sports Product Design, Sports Product Management (MBA), Journalism/Marketing, and Human Physiology.
- **THE UNIVERSITY'S WORLD-CLASS COLLEGIATE FACILITIES ARE RENOWNED** and include Autzen Stadium, considered one of the nation's top 10 venues to watch college football, the LEED Gold-certified Matthew Knight Arena, the newly renovated Hayward Field, and the cutting-edge Marcus Mariota Sports Performance Center.
- **NATIONAL PROFILES FOR COLLEGIATE SPORTS** including football, track & field, men's and women's basketball, baseball, softball, and more.
- **OREGON 2022 WORLD ATHLETICS CHAMPIONSHIPS** will be hosted in Eugene, often regarded as the heart and home of track and field.
  01. University of Oregon (Sports Marketing, Journalism/Brand Responsibility, Human Physiology)
  02. Oregon Ducks – NCAA Division 1 sports
  03. Home of the Prefontaine Classic (Diamond League, elite track & field)

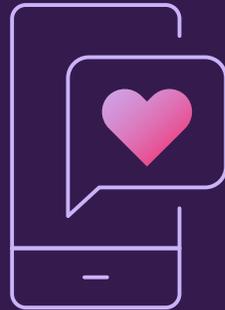


# GREATER PORTLAND ECOSYSTEM TRENDS



GREATER PORTLAND ECOSYSTEM TRENDS

# ECOSYSTEM TRENDS

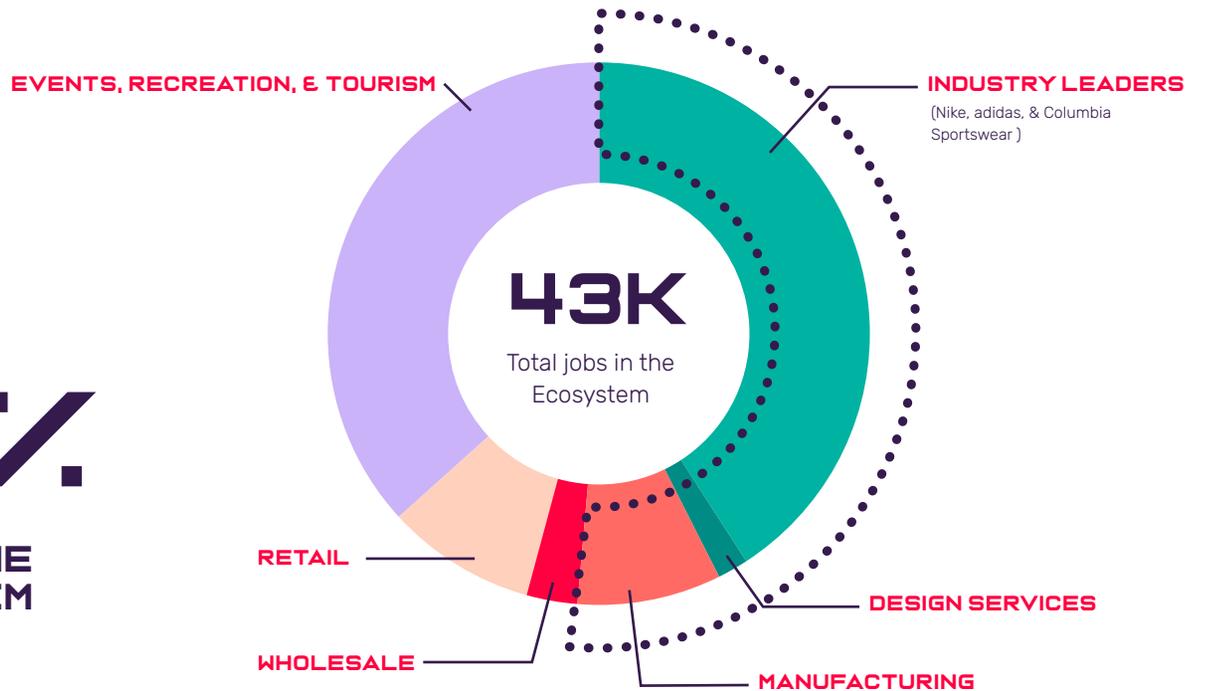


# ECOSYSTEM SECTOR OVERVIEW

This section includes a deep dive into the Athletic, Outdoor, Team, and Recreation Ecosystem in Greater Portland specifically, as the hub of the Ecosystem's activities within the Study Area. Employment in the Ecosystem is dominated by industry leaders (Nike, adidas, & Columbia Sportswear), with substantial sector representation in Events, Recreation, and Tourism; Manufacturing; and Wholesale. Approximately half of jobs are in generally higher-paid and/or higher-skilled sectors.



## ECOSYSTEM JOBS IN GREATER PORTLAND 2019

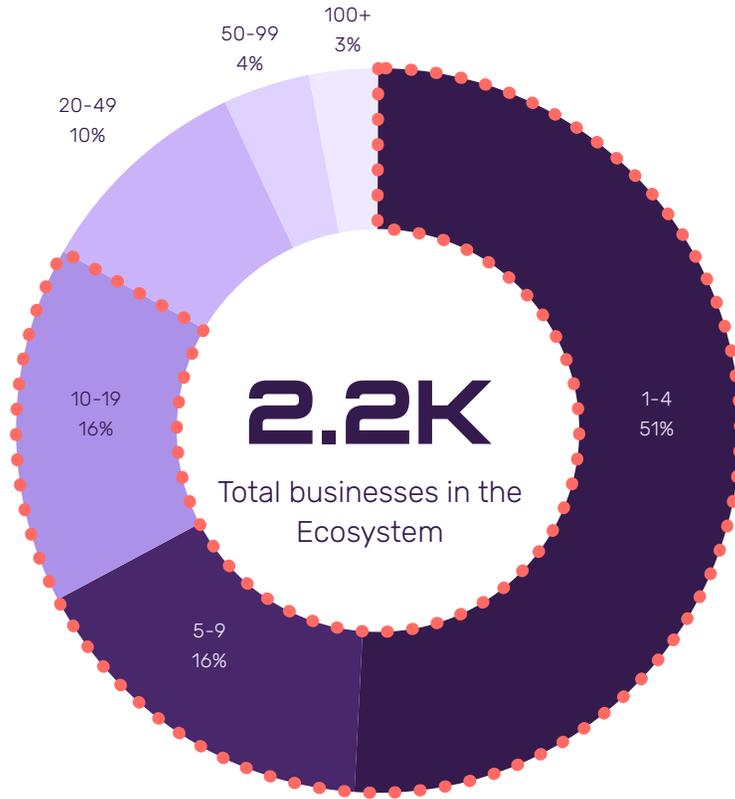


Sources: EMSI, Portland Business Journal, Columbia

# SMALL BUSINESSES

Despite the dominance of industry leaders (Nike, adidas, & Columbia Sportswear) in terms of employment, the vast majority of firms in the Ecosystem are small businesses.

### DISTRIBUTION OF ECOSYSTEM BUSINESSES in Greater Portland by Employee Count



**83%**

**BUSINESSES IN THE ECOSYSTEM**

with fewer than 20 employees

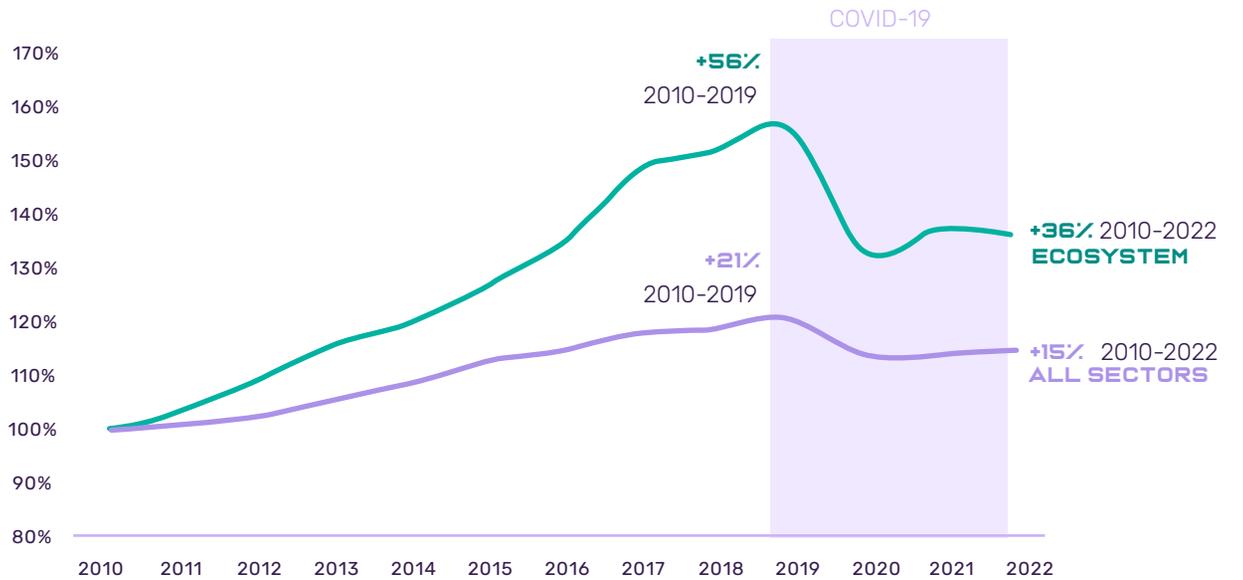
Sources: Reference USA

# ECOSYSTEM GROWTH

Growth in the Ecosystem significantly outpaced regional employment growth pre-COVID-19. Ecosystem jobs have dropped during COVID-19, driven by Events, Recreation, and Tourism, although total growth from 2010 to 2022 still exceeds that of the overall economy.

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

(Indexed to 2010)



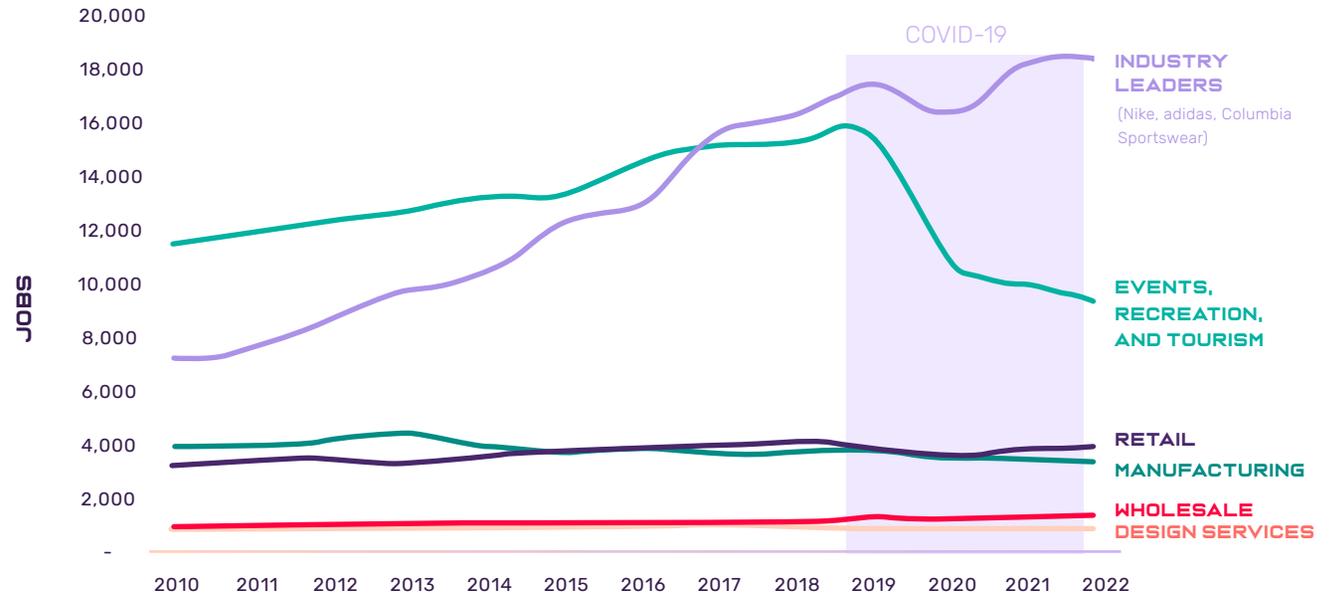
Sources: EMSI, Portland Business Journal, New York Times, Nike, adidas, Columbia, The Oregonian

GREATER PORTLAND ECOSYSTEM TRENDS  
**GROWTH BY SECTOR**

Industry Leaders (Nike, adidas, & Columbia Sportswear) as well as Events, Recreation, and Tourism jobs were the greatest drivers of growth prior to COVID-19. The latter category has suffered the most during COVID-19 due to forced shutdowns and social distancing requirements, even while Industry Leaders' employment grew further, and other sectors remained stable.

**JOBS IN GREATER PORTLAND'S TOP SECTORS AND EMPLOYERS**

2010-2022



Sources: EMSI, Portland Business Journal, New York Times, Nike, adidas, Columbia, The Oregonian



GREATER PORTLAND ECOSYSTEM TRENDS

# ECOSYSTEM BENCHMARKING



# COMPARISON REGIONS

This report benchmarks Greater Portland’s Athletic, Outdoor, Team, and Recreation Ecosystem against comparison regions—Greater Salt Lake City, Seattle, and Denver—that also function as hubs of sporting industry, leisure, and lifestyle. These peer regions have been the subject of previous comparisons, including for the Portland Business Alliance and Value of Jobs coalition’s *State of the Economy* report in 2020.

The **SALT LAKE CITY REGION** is a snow sports center with ample hiking and biking opportunities. It features major sporting goods headquarters, including Backcountry; Lifetime Equipment, Inc.; and well-known performance brands such as Petzl USA and Amer Sports. The region’s professional sports presence includes the Utah Jazz (NBA) and Real Salt Lake (MLS).

The **SEATTLE REGION**, a major hiking destination with ample watersports and ski options, hosts the headquarters of major brands including Recreational Equipment, Inc.; Eddie Bauer; K2 Sports; and Precor. It also hosts the North American headquarters of Raleigh Bicycle Company. The region’s professional sports presence includes the Seattle Seahawks (NFL), Storm (WNBA), Sounders (MLS), Mariners (MLB), and Reign (NWSL).

The **DENVER REGION**, another snow sports destination with ample hiking and trail opportunities, is home to well-known equipment manufacturers including Babolat for racquets, Crocs for footwear, Spyder for apparel, and Eagle Claw Fishing Tackle. Professional sports teams have dedicated fan bases in the region and include the Colorado Rockies (MLB), Rapids (MLS), Nuggets (NBA), and Broncos (NFL).



**Despite its smaller population size, Greater Portland outpaces each of these comparison regions in terms of the size, growth, and concentration of high-skilled, high-pay jobs in its Ecosystem.**

Note: For the purposes of analysis, comparison regions were defined as follows: Salt Lake City region (Davis, Salt Lake, Summit, and Weber counties), Denver region (Adams, Arapahoe, Broomfield, Boulder, Denver, and Jefferson counties), Seattle region (King County).



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



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

# ECOSYSTEM SIZE

Overall, Greater Portland employment is smaller than in comparison regions. Yet despite its smaller size, the Ecosystem is the largest both in absolute terms and adjusted per 1,000 jobs.

**TOTAL JOBS**  
2019



**ECOSYSTEM JOBS**  
2019



**ECOSYSTEM JOBS PER 1,000 JOBS**  
2019



Source: EMSI, American Community Survey, Portland Business Journal, Nike, Columbia Sportswear, adidas, New York Times

GREATER PORTLAND ECOSYSTEM TRENDS  
**ECOSYSTEM GROWTH**

The growth of the Ecosystem prior to the pandemic surpassed that of all comparison regions, gaining almost 9,000 jobs between 2010 and 2022.

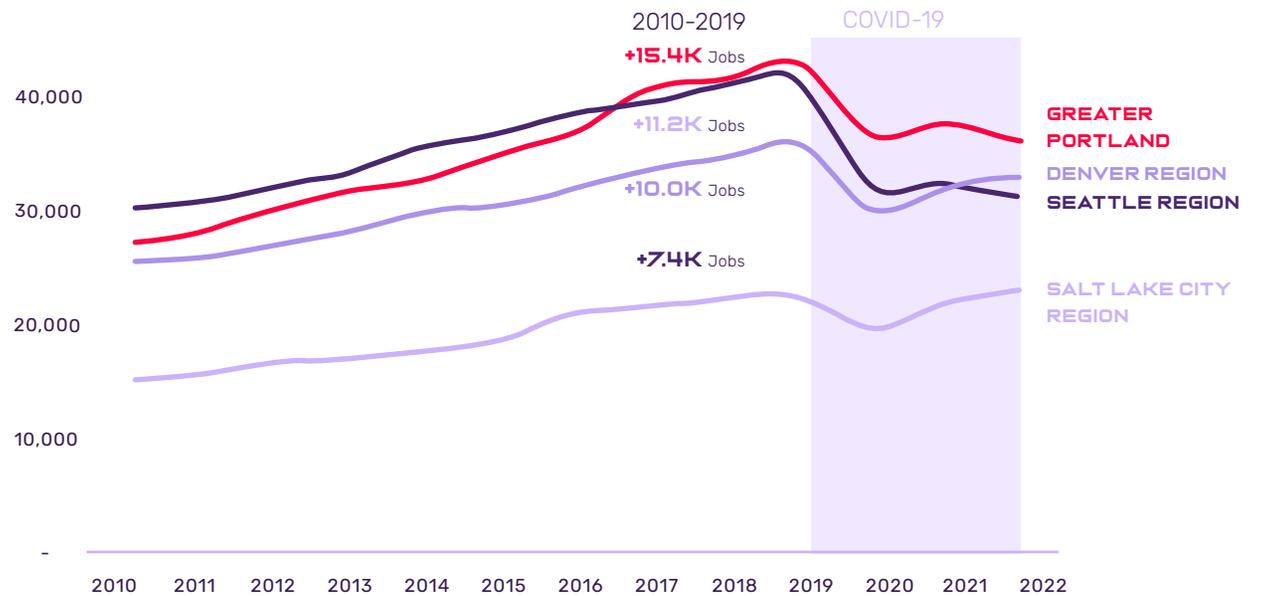


**ECOSYSTEM JOB GROWTH**

In Greater Portland between 2010 and 2022

**CHANGE IN ECOSYSTEM JOBS ACROSS COMPARISON REGIONS**

2010-2022



Sources: EMSI, Portland Business Journal, New York Times, Nike, adidas, Columbia Sportswear, The Oregonian

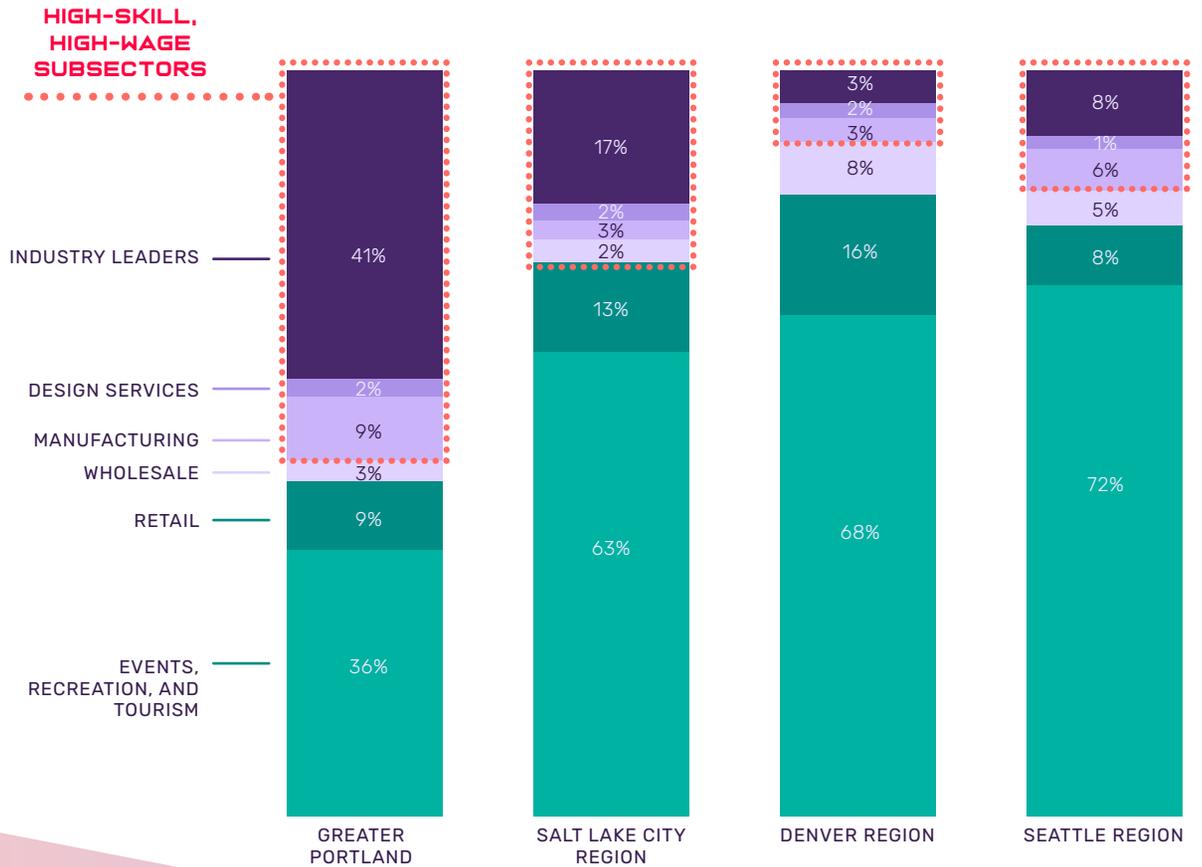
# ECOSYSTEM SECTOR COMPOSITION

Versus comparison regions, Greater Portland's Ecosystem has a more diverse array of sectors, with a greater concentration of high-paying, high-skilled design services and manufacturing jobs, in comparison to the lower-wage, lower-skilled Events, Recreation, and Tourism jobs that dominate comparison regions. Greater Portland's top three Ecosystem employers are significantly larger than those in other regions, serving as robust anchors and unparalleled magnets for talent.

"Industry Leaders" for each region include top three employers in sporting goods and apparel: Nike, adidas, Columbia Sportswear (Greater Portland); Backcountry, Lifetime, Clarus (Salt Lake City region); Crocs, Babolat, Eagle Claw (Denver region); REI, Precor, Eddie Bauer (Seattle region)

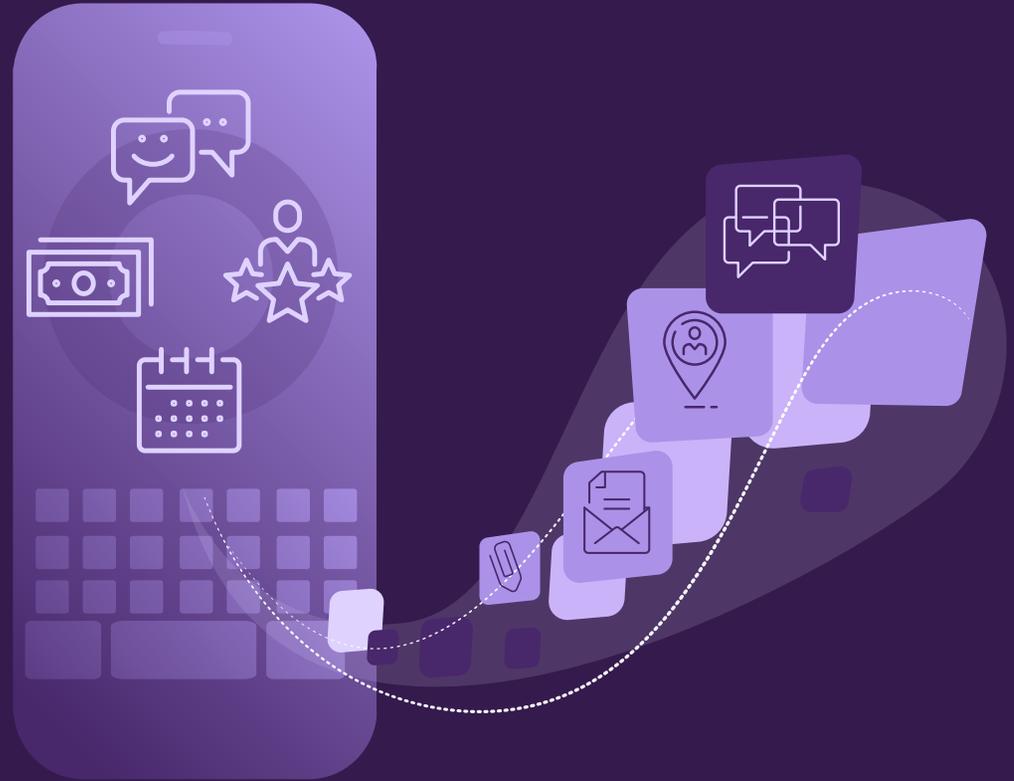
Number of employees are estimates based on news sources and Reference USA.

## DISTRIBUTION OF JOBS BY ECOSYSTEM SECTOR



Sources: EMSI, Portland Business Journal, Reference USA, Columbia Sportswear, news articles

# JOB OPPORTUNITIES



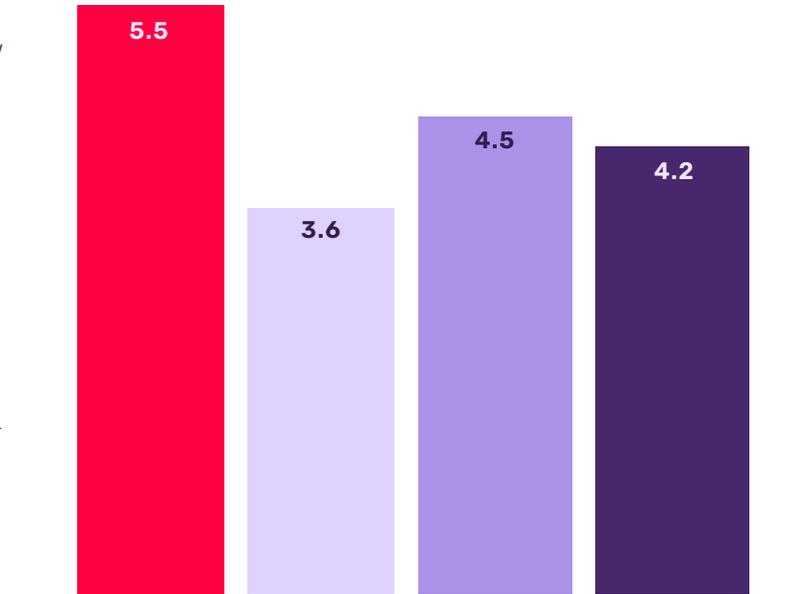
# HIGH-SKILLED CREATIVE OCCUPATIONS

Greater Portland has a disproportionate concentration of talent in creative occupations such as art directors, commercial and industrial designers, and fashion designers as compared to the Salt Lake City, Denver, and Seattle regions. While the number of self-employed workers in these occupations is growing rapidly across all regions, workers employed by businesses—who have more stable employment and often earn more than freelancers—grew by 60% in Greater Portland between 2010 and 2019, surpassing growth rates of only 48% in the Salt Lake City region, 52% in the Denver region, and 36% in the Seattle region.

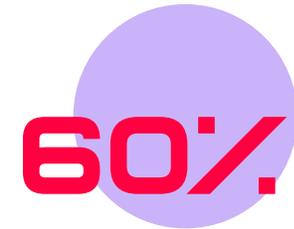
Note: Data includes all jobs in these occupations across all sectors—not just the Ecosystem—to examine a cross-section of talent that moves in and out of the Ecosystem. Data includes workers as well as the self-employed to capture the significant number of freelancers, or people outside traditional employment in creative sectors.

## JOBS IN SELECTED CREATIVE SPORTING GOODS OCCUPATIONS PER 1,000 JOBS

2019\*

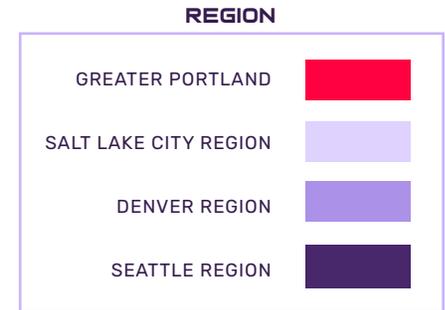


ART DIRECTORS + FASHION, COMMERCIAL, INTERIOR, & OTHER DESIGNERS



**CREATIVE OCCUPATION JOB GROWTH**

In Greater Portland between 2010 and 2019



Source: EMSI



# HIGH-SKILLED CREATIVE OCCUPATIONS (Cont'd)

In Greater Portland—as elsewhere—these creative occupations are highly skilled and well-paid.

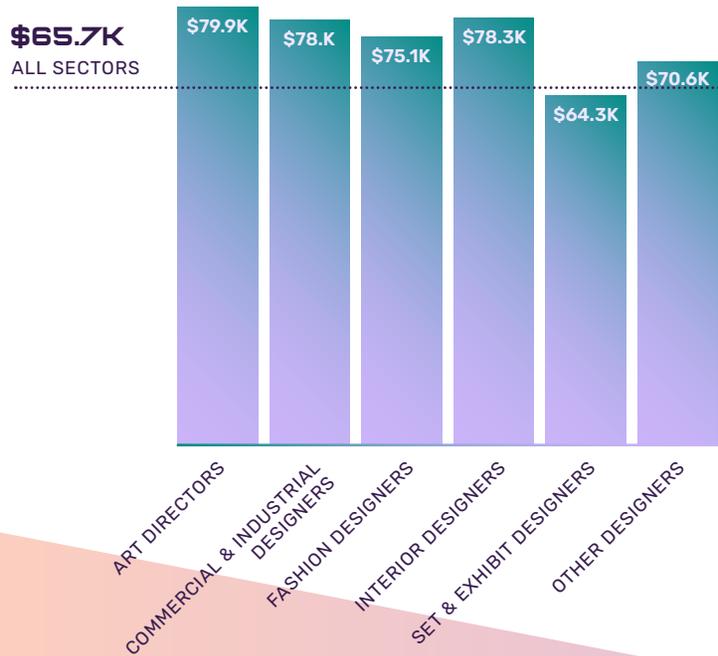
**6,947**  
**CREATIVE OCCUPATIONS**

Art directors + fashion, commercial, interior, & other designers

## AVERAGE WAGES

OF SELECTED CREATIVE SPORTING GOODS OCCUPATIONS IN GREATER PORTLAND

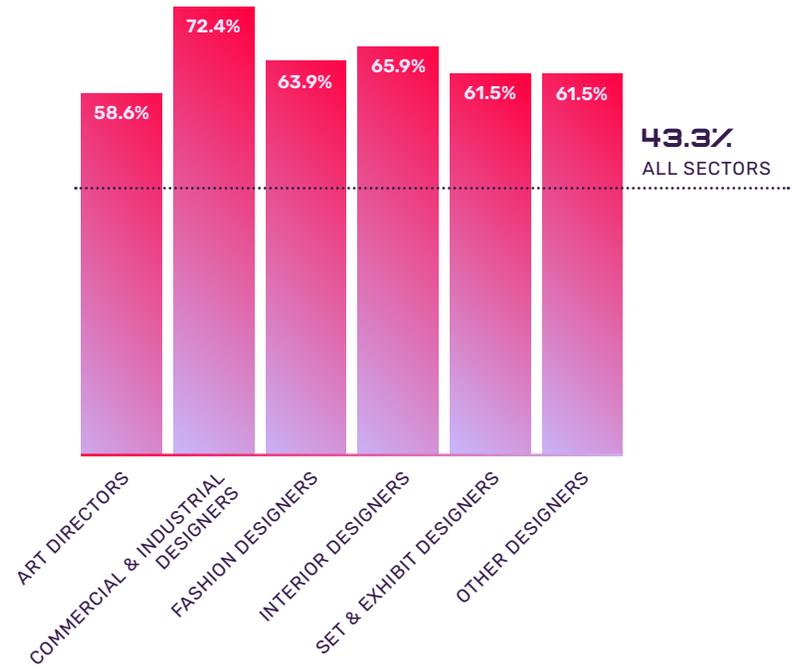
2019



## SHARE OF WORKERS WITH COLLEGE DEGREES

IN SELECTED CREATIVE SPORTING GOODS OCCUPATIONS IN GREATER PORTLAND

2019



Source: EMSI

<sup>1</sup> Data includes all jobs in these occupations across all sectors—not just the Ecosystem—to examine a cross-section of talent that moves in and out of the Ecosystem.



# ACCESSIBLE, WELL-PAYING MANUFACTURING JOBS

While 47% of Greater Portland's white workers have a college degree, only 33% of its workers of color do—a function of broader racial disparities the region must work to address. Because many manufacturing jobs do not require a college degree, they offer more economic opportunities to a more racially diverse workforce. Thirty-three percent of workers in sports-related manufacturing are non-white, although they constitute only 27% of the regional workforce as a whole.

Ecosystem Manufacturing Subsectors composed of: apparel knitting mills, cut & sew, apparel, footwear, saw blade & hand tool, motorcycle, bicycle, sporting & athletic goods, kitchen, cookware, and cutlery

**3,815**  
**JOBS**  
 Ecosystem Manufacturing Subsectors

**AVERAGE WAGES**  
 IN SELECTED MANUFACTURING SECTORS IN GREATER PORTLAND

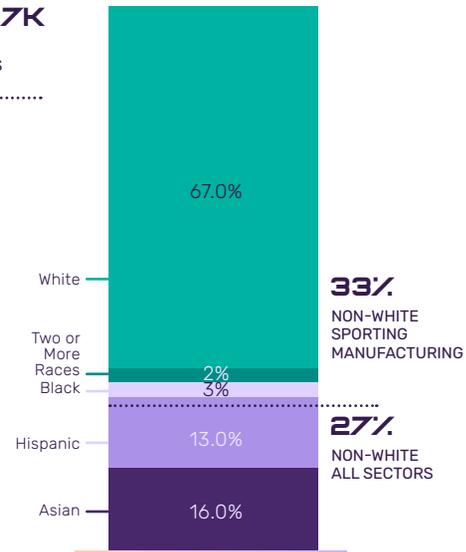
2019



ECOSYSTEM MANUFACTURING SUBSECTORS

**WORKER RACE**  
 IN SELECTED MANUFACTURING SECTORS IN GREATER PORTLAND

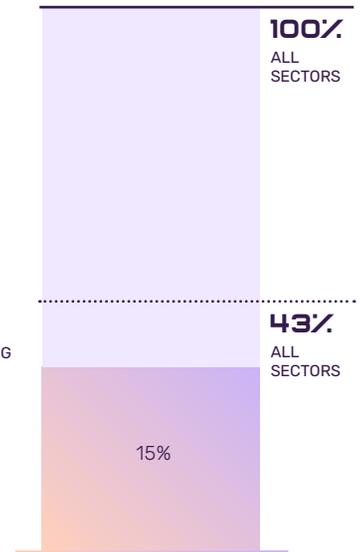
2019



ECOSYSTEM MANUFACTURING SUBSECTORS

**SHARE OF WORKERS WITH A COLLEGE DEGREE**  
 IN SELECTED MANUFACTURING SECTORS IN GREATER PORTLAND

2019



ECOSYSTEM MANUFACTURING SUBSECTORS

Sources: EMSI, Bureau of Labor Statistics



# APPENDIX

# ECOSYSTEM INDUSTRY DEFINITION

NAICS	INDUSTRY
315990	Other apparel knitting mills
3152	Cut & sew apparel manufacturing
3159	Apparel accessories & other apparel manufacturing
3162	Footwear manufacturing
3322	Cutlery and hand tool manufacturing
336991	Motorcycle, bicycle, and parts manufacturing
339920	Sporting and athletic goods manufacturing
423910	Sporting and recreational goods and supplies wholesalers
424320-30	Men's, women's, boys', and children's merchant wholesalers
441210	Recreational vehicle dealers
441222	Boat dealers
441228	Motorcycle, ATV, and other motor vehicle dealers
451110	Sporting goods stores
4871-9	Land, water, and other scenic transportation and sightseeing
541420	Industrial design services
541490	Other specialized design services (includes shoe design)
5616	Travel agencies and tour operators
611620	Sports and recreation instruction
7112	Sports teams, racetracks, and spectator sports
7139	Other amusement and recreation industries
721211	Recreational vehicle parks and campgrounds
	Selected major apparel HQs

Note: Footwear wholesalers not included in definition to avoid double counting, as in 2013 the industry likely underwent "noneconomic reclassification" by the Oregon Employment Department.

Because industry leaders—Nike, adidas, and Columbia Sportswear—are categorized under Management of Companies and Enterprises (NAICS 5511) by the state of Oregon, HR&A added employment associated with those companies separately.

# METHODOLOGY



## OVERVIEW

HR&A's economic impact analysis estimates the direct and multiplier (indirect and induced) effects of the Ecosystem in the economy in terms of jobs, earnings, and economic output. HR&A's fiscal impact analysis estimates the personal income, corporate excise, and local business taxes based on these direct and multiplier impacts.

Given the impact of the COVID-19 pandemic on economies globally, HR&A used 2019 employment data as inputs for both the economic and fiscal impact analyses to capture a typical year of ecosystem activity. HR&A conducted this analysis for three counties in Oregon: Clackamas, Multnomah, and Washington; and the Bend-Redmond and Eugene-Springfield metropolitan statistical areas (MSAs). HR&A used multipliers for the tri-county region for the three counties and the individual MSA multipliers for each of the MSAs.

The **direct impact** is the employment, compensation, and output in the sporting subsectors that collectively constitute the Ecosystem. The **indirect impact** is the employment, compensation, or output associated with businesses that supply the industries constituting the Ecosystem. The **induced impact** represents the

employment, compensation, or output associated with household spending of employees who work in industries directly and indirectly affected by the Ecosystem.

## ECONOMIC IMPACT ANALYSIS

The EMSI Input-Output (I-O) model represents the flow of money in an economy, primarily along industries. The I-O model is based on the premise that interactions among industries within an economy can be quantified, with a portion of the output of one industry appearing as the input of other industries.

EMSI's I-O model uses Industry Economic Accounts produced by the Bureau of Economic Analysis (BEA) as the primary source of data. The data provides a summary of how industries produce and consume commodities and is customized for smaller regions of the country, using each region's unique industry mix and spending patterns. The model uses this data to produce direct, indirect, and induced multipliers for employment, earnings, and sales. The model also outputs jobs to sales and earnings to sales ratios, which allowed HR&A to use jobs in the ecosystem as a singular input to generate total economic impact across jobs, earnings, and economic output (sales).

HR&A utilized the 2021 EMSI I-O model, which is the most recent year available, since multipliers for 2019 are not available.

## FISCAL IMPACT ANALYSIS

### INCOME TAX

HR&A calculated the income tax generated to the State of Oregon based on the total number of workers in the sporting ecosystem and average salary per worker to determine the total annual income for direct jobs within the ecosystem. Based on commuting data provided by the U.S. Census, HR&A assumed 92% of employees within the study area live in and pay income tax to the State of Oregon.

### CORPORATE EXCISE TAX

HR&A calculated state corporate excise tax revenue from the ecosystem based on the ecosystem's direct value added as a share of Gross State Production (GSP).

### CORPORATE ACTIVITY TAX

HR&A calculated what state corporate activity tax revenue would have been from the ecosystem in 2019 had the tax been in effect based on the ecosystem's direct value added as a share of GSP.





## INTERVIEWS AND FOCUS GROUPS



HR&A interviewed 22 organizations in the following focus groupings, connected to the ecosystem, to understand their role and attraction to the District, the challenges and opportunities they face, and their relationships to one another.

- > **SPORTING GOODS AND APPAREL**
- > **TOURISM**
- > **EDUCATION AND WORKFORCE**
- > **BEND AND EUGENE**