

DATE: October 14, 2024
TO: Douglas County
FROM: Robert Whelan, ECONorthwest
SUBJECT: Regional sports park visitor spending impact analysis

It is my understanding that a new regional sports park development is under consideration for Douglas County. The project will include four turf baseball/softball fields and four turf fields for lacrosse, soccer, or football. It will also include a 60,000 square-foot indoor facility with basketball, volleyball, and pickleball courts. This building will also serve as a disaster relief center.

I was asked to estimate visitor spending impacts. This was done by first estimating the numbers and types of visitors for a typical year using data for a set of comparable facilities in Oregon. The visitor data came from Placer.ai, which collects and analyzes smart phone location data. For visitor spending, I used the 2022 spending impact study by Dean Runyan Associates. Dean Runyan estimates direct travel impacts by county for Travel Oregon. I also used the 2022 IMPLAN economic impact model for Douglas County.

Scope and definitions

In this memorandum the term “local” means Douglas County. All spending impacts exclude any expenditures made outside of Douglas County, whether directly or indirectly. A visitor is anyone who goes to a sports complex for over 45 minutes. Defining visitors, this way, avoids capturing incidental visits.

Local visitors are those who would come to a sports park and live less than 50 miles away. I assumed that those living between 50 and 150 miles from their home would be day-trippers. In other words, they are unlikely to stay overnight in Douglas County. However, those living over 150 miles from the sports park will stay overnight. These overnight visitors are split into two types. The first are those who would stay in a hotel, motel, or an STVR (short term vacation rental, such as an Airbnb.) Others would stay in private homes (friends & family), second homes, RV parks, campgrounds.

Since the most recent travel spending and economic impact data for Douglas County are from 2022, this analysis first calculates spending in 2022 dollars. I later adjust that for the expected inflation between 2022 and 2025.

Using the economic impact model, I derived an average multiplier for economic output, but then applied it to sales. This is an uncommon application but a reasonable simplification for our purposes here.

Direct spending is that which is done by the visitors themselves. Their spending stimulates further spending in the economy. Sometimes this is called a rippling effect. In this report we measure both.

I did include direct spending by county residents using the sports park. I included that spending because without the sports complex many residents would travel outside the county so their children can compete in tournaments. By having the complex in Roseburg, Douglas County would recapture some of that spending. Economists call this “import substitution.”

Comparable facilities and visitor forecast

We collected smart phone data for a 36 month period between October 2021 through August 2024 for nine existing sports facilities in Oregon. We only counted visits that lasted over 45 minutes. We considered those living within 50 miles to be locals. Those living between 50 and 150 miles are non-locals, however, we assume they would not stay overnight. For those living over 150 miles, we assume they stayed overnight and then split it between hotel and non-hotel accommodations. This was done by tracing trips made by non-local overnight visitors to and from their destinations, of which hotels are one of them.

The noncomparable facilities vary in size and complexity. Several are more modest than what is being proposed for Roseburg while others are grander. We used a statistical average of the nine comparable facilities as our estimate for Roseburg.

Table 1: Visits over 45 minutes in length to comparable sports facilities, annual averages from smartphone location data covering October 2021 through August 2024

Facility	Location	Overnight hotel & STVRs	Overnight other accommodation	Daytrip, nonlocal	Locals	Total
HMT Recreation Complex	Tualatin	5,618	23,782	35,900	601,367	666,667
Lithia & Driveway Fields	Medford	26,278	36,289	61,767	409,000	533,334
Hood View Park	Happy Valley	394	1,773	6,633	105,133	113,933
Skyline Sports Complex	Bend	1,498	1,469	4,133	15,733	22,833
Steen Sports Park	Klamath Falls	2,012	12,888	16,433	199,533	230,866
Bryant Sports Park	Albany	425	3,442	5,133	49,600	58,600
Wallace Marine Park	Salem	5,718	16,882	22,300	174,900	219,800
Bob Keefer/Les Schwab	Springfield	2,213	7,087	15,300	83,733	108,333
Delta Park sports fields	Portland	7,745	25,355	45,900	354,333	433,333
Average		5,767	14,330	23,722	221,481	265,300

Relying primarily on visitor spending data by type (hotel, restaurant, gas stations, *etc.*), I calculated direct visitor spending in Douglas County. I then applied the output multiplier ratio for Douglas County, which covers the mix of spending conducted by visitors. Finally, I adjusted the 2022 dollar amounts for inflation to provide an estimate for the year 2025. That estimate is \$6,899,743.

Table 2: Visitor spending impact

Visitor	Visitor days	Local spending (2022\$)
Overnight nonlocals:		
Hotels, STVRs, motels	5,767	\$824,649
Private homes, RV, other	14,330	691,991
Overnight visitors	20,096	\$1,516,640
Daytrip visits:		
Nonlocals	23,722	\$830,274
Locals	221,481	1,661,110
Daytrip visitors	245,203	\$2,491,384
Visitor days & spending	265,300	\$4,008,024
x Multiplier effect		1.575
Total local spending impact (2022 \$)		\$6,311,441
x price inflation 2022-2025		1.093
Total local spending impact (2025 \$)		\$6,899,743