

# Oregon Horse Racing

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## **Comprehensive Rural & Economic Development Impact Report**

Date: February 2026

Status: Robust preliminary analysis; pending official county-specific BEA RIMS II multipliers.

## Executive Summary

Oregon's live horse racing season generates concentrated rural economic activity—especially in Crook, Josephine, Tillamook, and Union counties—while supporting statewide agricultural and service supply chains. Using confirmed annual attendance (141,000) and conservative visitor-spending assumptions aligned with Travel Oregon / Dean Runyan reporting practices, this report estimates approximately \$39–\$46 million in direct annual economic activity attributable to Oregon live racing. Applying conservative multiplier ranges consistent with BEA's RIMS II input-output framework, total annual economic output is estimated at \$52.6–\$69.0 million.

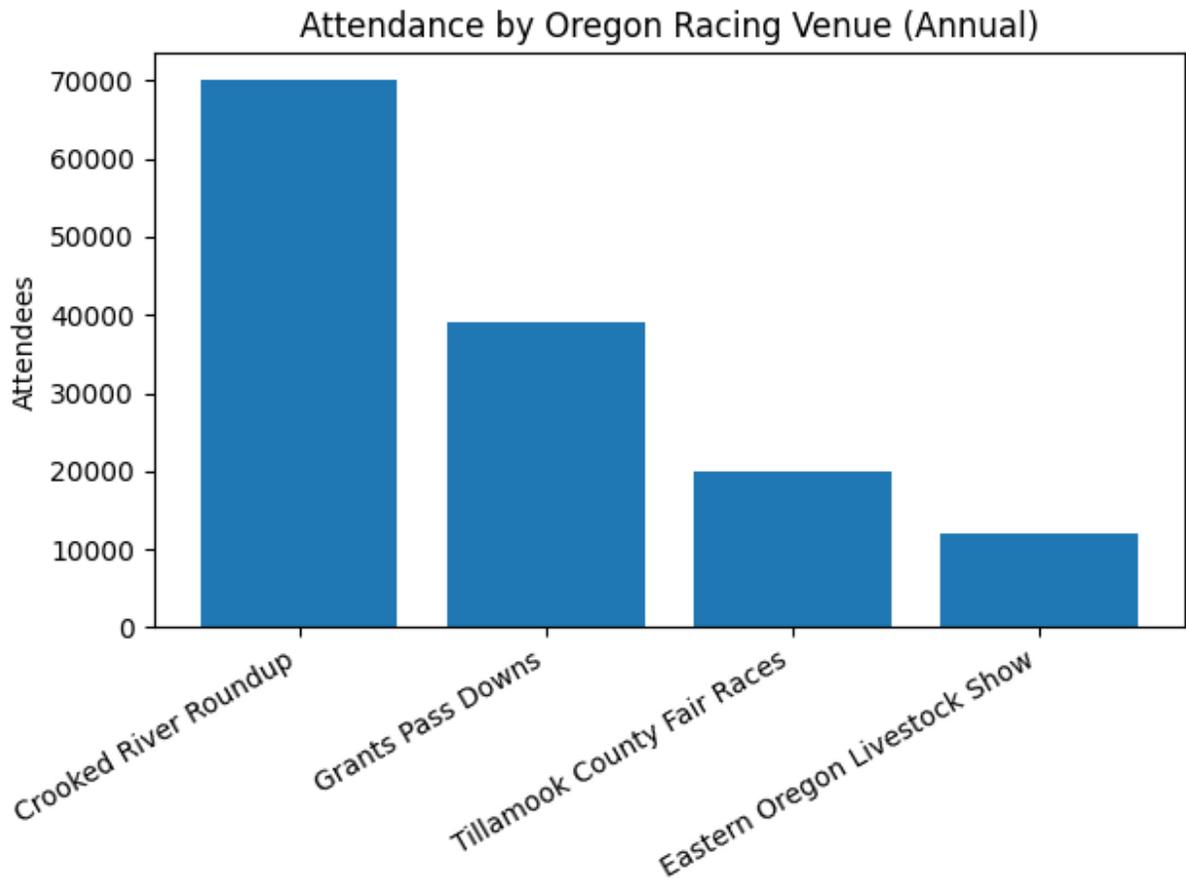
Employment supported is estimated at approximately 401–626 jobs annually, including direct venue and participant employment, indirect supply-chain jobs, and induced jobs supported by household spending. This employment estimate explicitly anchors the visitor-spending portion to Travel Oregon's statewide travel-generated jobs-to-spending relationship and then adds conservative racing-operations and multiplier effects (see Employment Methodology).

Key rural-development findings:

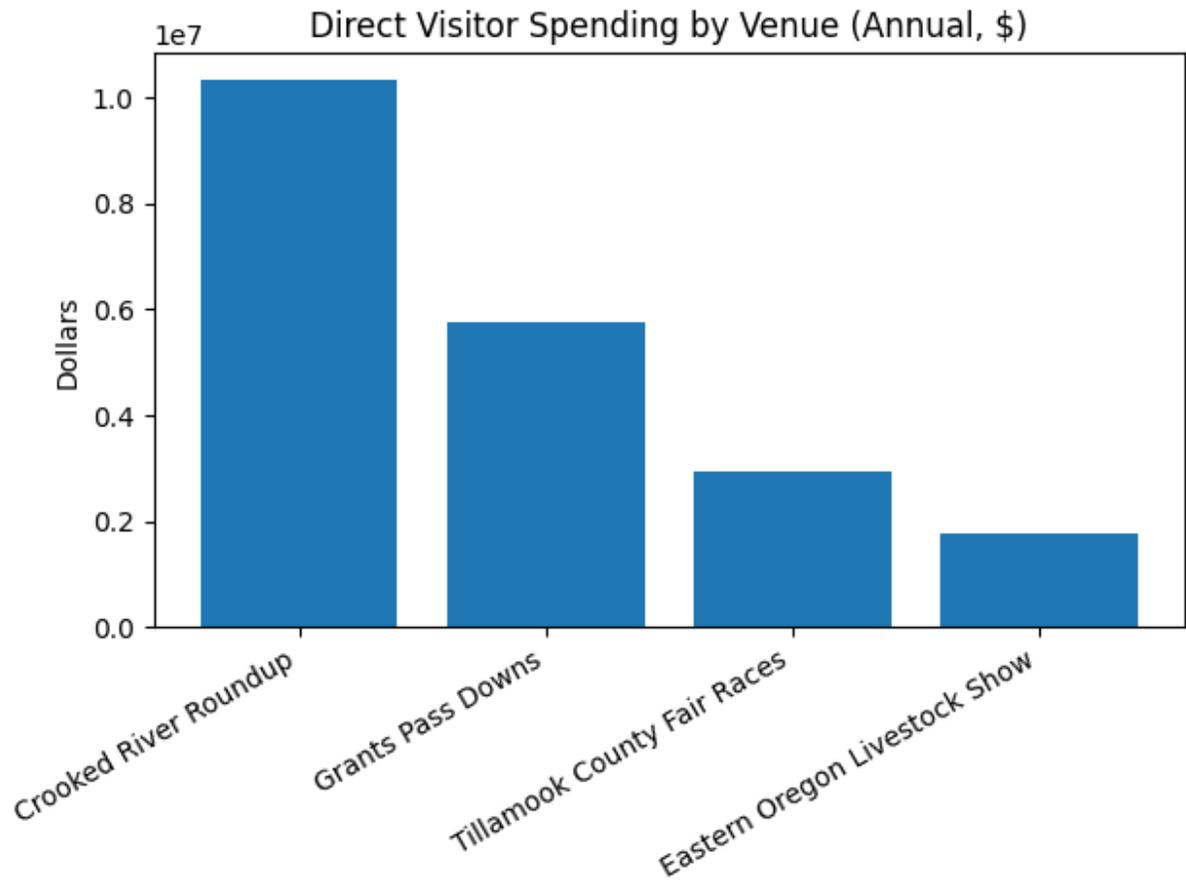
- Racing events operate as recurring seasonal demand shocks that stabilize rural hospitality employment.
- Racing supports agricultural activity through hay/feed demand, veterinary services, farriers, transport, and equipment.
- Spending concentrates in local small businesses (lodging, food service, retail, fuel) and contractor services (security, maintenance).

## Core Indicators (Graphs)

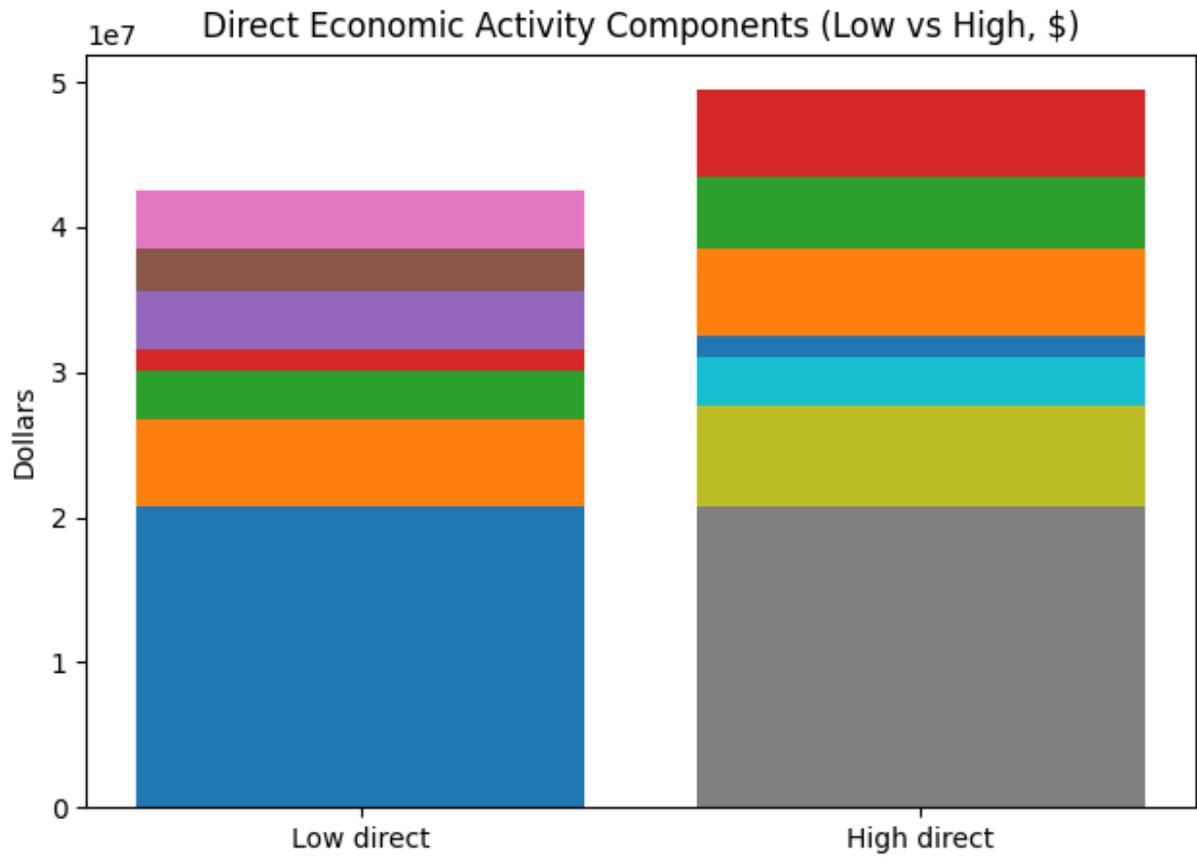
Attendance by venue:



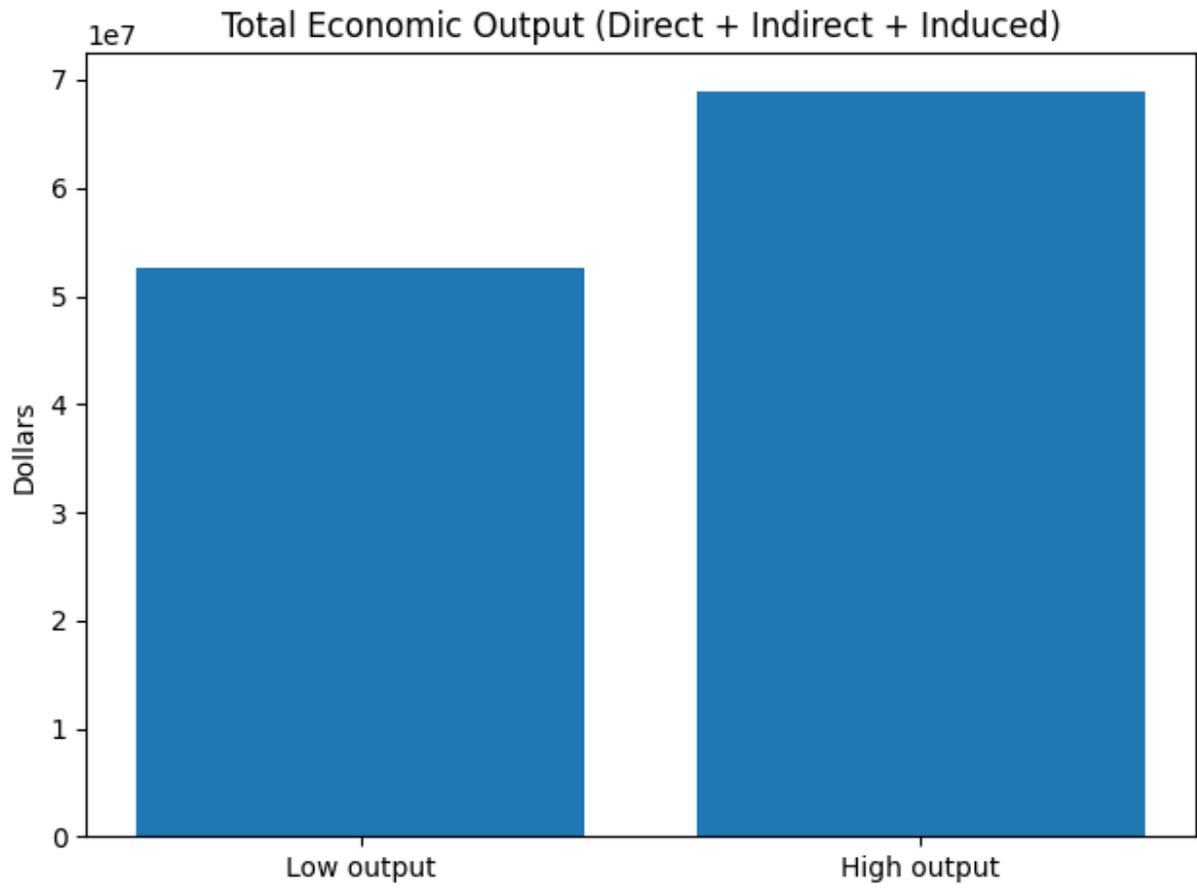
Direct visitor spending by venue:



Direct economic activity components (low vs high):

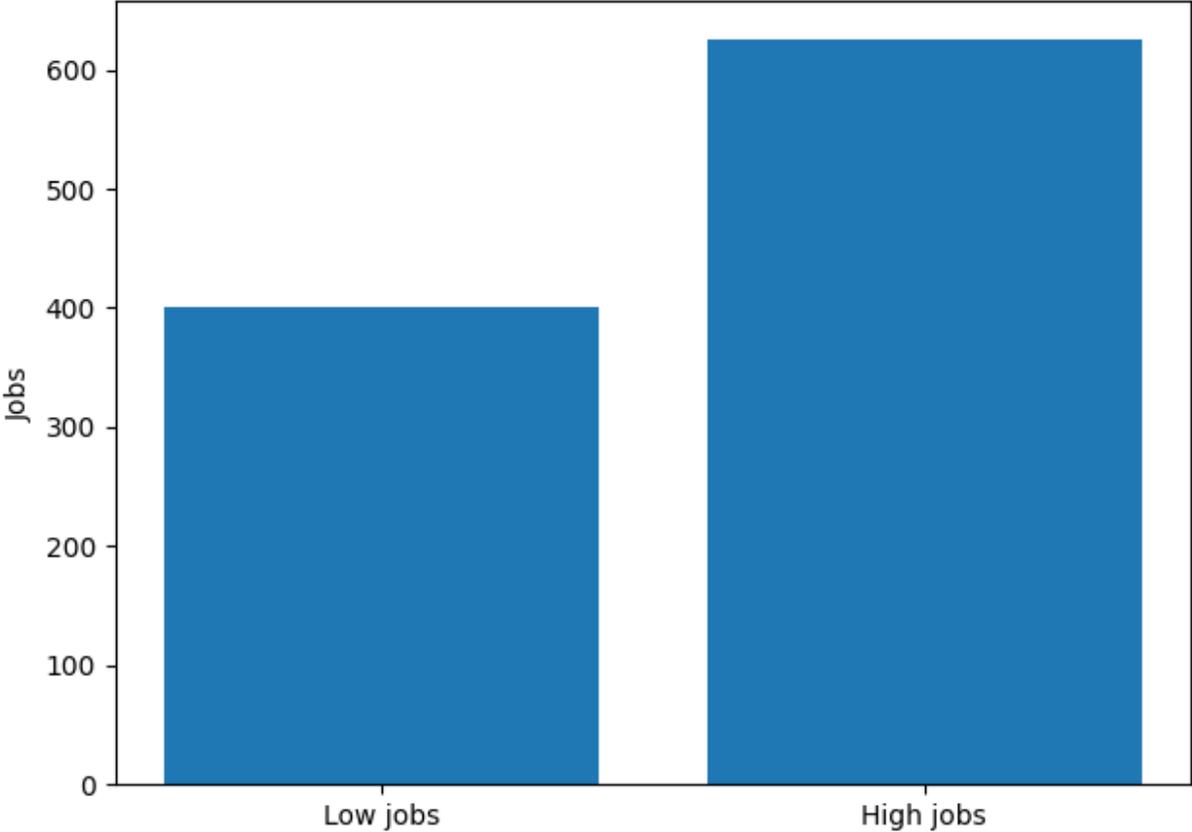


Total economic output range (with multipliers):



Estimated employment range:

Estimated Jobs Supported Statewide (Annual)



## 1. Oregon Live Racing Footprint and Confirmed Attendance

This report covers the four major live racing events/venues with confirmed annual attendance figures provided for testimony preparation.

County	Venue / Event	Annual Attendance	Notes
Crook	Crooked River Roundup	70,000	Confirmed (provided)
Josephine	Grants Pass Downs	39,000	Confirmed (provided)
Tillamook	Tillamook County Fair Races	20,000	Confirmed (provided)
Union	Eastern Oregon Livestock Show	12,000	Confirmed (provided)

Total attendance across these venues: 141,000.

## 2. Visitor Spending Model (Direct Impact)

Visitor spending is modeled using a conservative overnight/day-trip structure that aligns with the category approach used in Oregon travel-impact reporting (lodging, food service, retail, local transportation). Because a venue-specific visitor survey is not yet available, this model uses conservative benchmarks and is designed to be replaced with survey-based or Travel Oregon county-level parameters if obtained.

Direct visitor spending results by venue (annual):

Venue	County	Direct Visitor Spending (\$)
Crooked River Roundup	Crook	\$10,318,000
Grants Pass Downs	Josephine	\$5,748,600
Tillamook County Fair Races	Tillamook	\$2,948,000
Eastern Oregon Livestock Show	Union	\$1,768,800

Total direct visitor spending (all venues): \$20,783,400.

### 3. Racing Industry Direct Spending (Non-Visitor)

In addition to visitor spending, live racing produces direct expenditures associated with horse care and transportation, venue operations, participant compensation (purses), and regulatory integrity and safety. These expenditures flow into local businesses (agricultural suppliers, veterinary and farrier services, contractors) and into Oregon households.

Direct Component	Low (\$)	High (\$)
Visitor spending	\$20,783,400	\$20,783,400
Horse owner/trainer spend	\$6,000,000	\$6,900,000
Purse distribution	\$3,300,000	\$3,300,000
Integrity & safety	\$1,500,000	\$1,500,000
Venue operations	\$4,000,000	\$6,000,000
Ancillary services	\$3,000,000	\$5,000,000
Licensee household activity	\$4,000,000	\$6,000,000

Total direct economic activity (all components): \$39,000,000 – \$46,000,000 annually.

### 4. Indirect and Induced Effects (RIMS II Framework)

Total output effects are estimated using a conservative blended multiplier range intended to approximate the mix of hospitality, retail, transportation services, and agricultural-support services affected by racing. These provisional multipliers are placeholders until official county-specific BEA RIMS II multipliers are obtained for Crook, Josephine, Tillamook, and Union counties.

Estimated total economic output (direct + indirect + induced): \$52,600,000 – \$69,000,000 annually.

### 5. Employment Impact (Robust Methodology)

This employment estimate is built in layers to avoid overstatement and to remain defensible for testimony:

(A) Visitor-spending anchored jobs: Using Travel Oregon’s 2024 statewide estimate of 121,020 travel-generated jobs associated with \$14.3B in direct travel spending ( $\approx 8.46$  jobs per \$1M), the visitor spending portion of racing supports approximately 176 travel-generated jobs annually.

(B) Racing-operations direct jobs: Adds conservative direct employment tied to racing operations and participants (e.g., trainers, grooms, jockeys, veterinarians, farriers, security,

track maintenance, concessions, broadcast/production). Because a complete Oregon headcount by occupation is not yet compiled, this report uses a conservative bracket based on typical staffing patterns for comparable racing meets and fair-event operations.

(C) Indirect and induced jobs: Adds conservative secondary employment supported by supplier purchases and by household spending from wages and proprietor income.

Resulting total employment supported (annual): approximately 401 – 626 jobs statewide.

Employment sensitivity and labor market context:

Oregon county labor market reporting provides context for rural employment stability and seasonality, particularly in counties where leisure/hospitality is a significant employment base.

## **6. County-by-County Rural and Economic Development Narrative**

### **Crook**

Crook County benefits from large-event attendance associated with the Crooked River Roundup, driving lodging, food service, retail, and fuel sales and supporting seasonal employment. The event also supports local contractors and service providers (security, maintenance, sanitation, event staffing).

### **Josephine**

Josephine County benefits from Grants Pass Downs attendance and racing operations that purchase local services and support hospitality demand. Racing-related supply chain activity includes transportation services, equipment suppliers, and agriculture-adjacent inputs.

### **Tillamook**

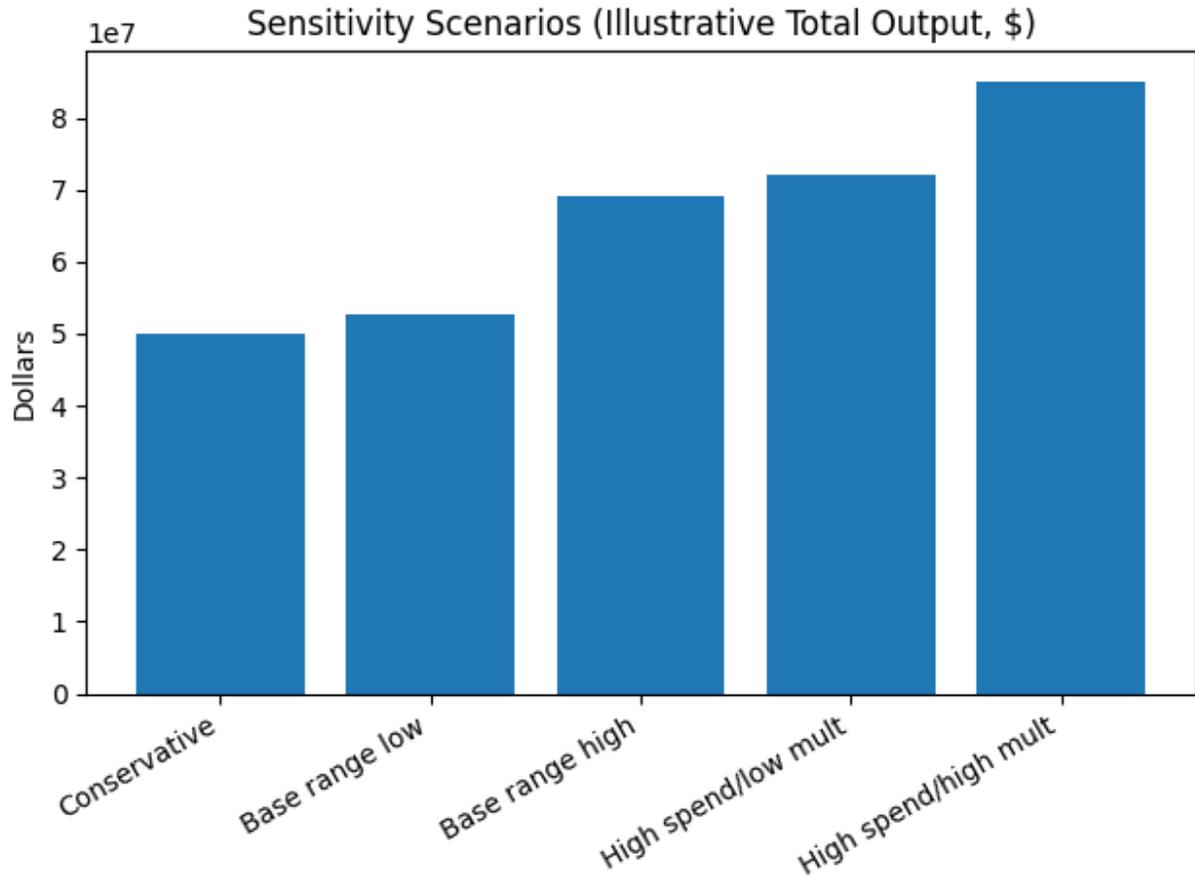
Tillamook County's fair-based racing activity supports visitor activity and seasonal employment, complementing the county's tourism profile and supporting small businesses and local tax bases tied to lodging activity.

### **Union**

Union County's Eastern Oregon Livestock Show racing activity contributes to regional tourism and supports agricultural linkages including feed/hay demand, veterinary services, and transportation services common in Eastern Oregon.

## **7. Sensitivity Analysis (Illustrative)**

Because visitor mix, spending levels, and multipliers vary by county and event characteristics, the report includes an illustrative sensitivity analysis to test whether conclusions remain stable under more conservative or more generous assumptions.



## 8. Limitations and Next Steps to Finalize (RIMS II County Tables)

This report is intentionally conservative and does not include speculative impacts such as major capital construction, long-term breeding expansion, or waging policy changes. The next step for finalization is to insert official BEA RIMS II county multipliers (Output, Earnings, Employment, and Value Added) for the four primary venue counties and to replace provisional multiplier ranges with those official figures.

## References and Data Sources

1. Travel Oregon (Oregon Tourism Commission) — “Economic Impact of Travel in Oregon” landing page (May 5, 2025).

<https://industry.traveloregon.com/research/oregon-travel-impacts/>

2. Travel Oregon / Dean Runyan Associates — “2024 Economic Impact Summary” (PDF; travel spending, jobs, earnings, tax revenue).

[https://industry.traveloregon.com/wp-content/uploads/2025/05/TO\\_Economic-Impact\\_Summary\\_2024\\_R1.pdf](https://industry.traveloregon.com/wp-content/uploads/2025/05/TO_Economic-Impact_Summary_2024_R1.pdf)

3. U.S. Bureau of Economic Analysis — RIMS II User's Guide (methodology and appropriate use of multipliers).

<https://www.bea.gov/resources/methodologies/RIMSII-user-guide>

4. U.S. Bureau of Economic Analysis — RIMS II blog explaining annual updates and typical uses (March 10, 2025).

<https://www.bea.gov/news/blog/2025-03-10/need-info-regional-impacts-rims-ii-you>

5. U.S. Bureau of Labor Statistics — Leisure and Hospitality industry overview (employment context).

<https://www.bls.gov/IAG/TGS/iag70.htm>

6. USDA NASS — Oregon 2024 State Agriculture Overview (hay production/value; relevant to equine feed linkages).

[https://www.nass.usda.gov/Quick\\_Stats/Ag\\_Overview/stateOverview.php?state=Oregon&year=2024](https://www.nass.usda.gov/Quick_Stats/Ag_Overview/stateOverview.php?state=Oregon&year=2024)

7. Oregon Employment Department / QualityInfo — county labor market releases (example: Tillamook County employment release).

<https://www.qualityinfo.org/>

8. Oregon Department of Revenue — Transient Lodging Tax program page (tourism-related tax mechanism).

<https://www.oregon.gov/DOR/programs/businesses/Pages/lodging.aspx>

9. Oregon Department of Transportation — Fuels Tax updates (fuel tax context for visitor travel spending).

<https://www.oregon.gov/odot/FTG/Pages/Updates.aspx>