The Economic Impact of the Regional Public Universities of Oregon

Quantifying the Impact of Eastern Oregon University, Southern Oregon University, and Western Oregon University

Date: July 1, 2026



ECONSULT SOLUTIONS INC.
economics | strategy | insight

1435 WALNUT STREET, 4TH FLOOR | PHILADELPHIA, PA 19102
215-717-2777 | ECONSULTSOLUTIONS.COM

1. Executive Summary

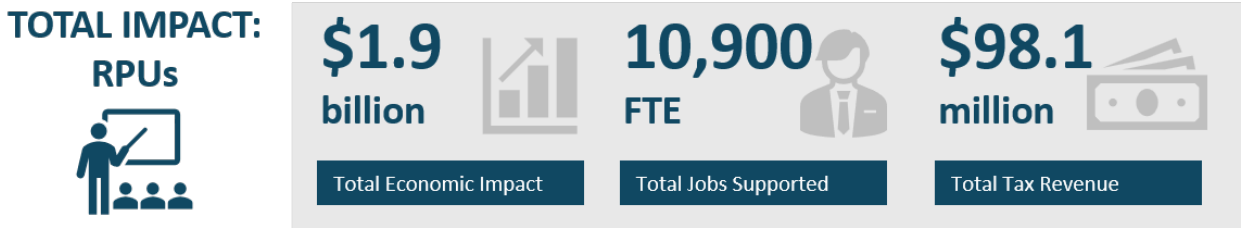
1.1. Oregon's Regional Public Universities as Economic Force for the State of Oregon

Oregon's Regional Public Universities (RPUs)—Eastern Oregon University, Southern Oregon University, and Western Oregon University—collectively represent a significant economic force for the State of Oregon. Through their annual operations, sustained capital investments, the off-campus spending of students, employees, and visitors, and the premium associated with an RPU degree, these three institutions generate substantial economic output, support thousands of jobs, and produce meaningful tax revenues for the State of Oregon and the local economies of which they are a part. Their impact reaches well beyond their campus boundaries, extending into supply chains, labor markets, and communities across every corner of the state.

This section presents the combined economic and fiscal impact of the three RPUs at the statewide level, organized first by impact category and then by institution. It also captures the value of the RPUs as workforce development engines, institutions that connect students and community members not only with careers that sustain their families, but also with the credentials and skills that Oregon employers need to remain competitive. The graduates these universities produce enter classrooms, clinics, public agencies, and private enterprises across the state, generating tax revenues that fund statewide priorities and reinforcing the economic foundation of Oregon's communities. Taken together, the findings demonstrate that Oregon's investment in its regional public universities yields broad and measurable returns in the form of economic activity, employment, household income, and public revenue. Detailed institution-level analyses, including the geographic distribution of impacts within each university's primary service region, are presented in Sections 3 through 5 of this report.

In total, Oregon's three Regional Public Universities generate nearly $1.9 billion in annual economic impact within the State of Oregon, supporting 10,900 jobs with $524 million in employee compensation. These figures encompass the combined effects of institutional operations, capital investment activity, ancillary spending by students and visitors, and the annualized premium associated with an RPU degree. In addition, the universities' economic activity generates approximately $97.4 million in annual tax revenue for the State of Oregon, including income taxes and business-related taxes supported by university-driven economic activity.

Statewide Annual Economic and Fiscal Impact



1.2. Aggregate Annual Economic and Fiscal Impact by Entity

Each of Oregon's three Regional Public Universities contributes to the state's economy through its own distinct combination of operational scale, capital investment activity, student and visitor activity, and the wage premium earned by their alumni. While the institutions differ in enrollment size, geographic setting, and programmatic emphasis, each serves as an anchor institution within its respective region and generates economic impacts that extend across the State of Oregon.

Figure 1.1 presents the combined annual economic impact of the three RPUs, disaggregated by institution. The total economic impact of each institution is comprised of:

- Operations, capital, and ancillary spending impacts, which represent the recurring annual economic activity generated as the universities operate, invest in facilities, and support students, employees, and visitors; and
- Alumni wage premium impacts, which represent the economic activity supported by the higher wages earned by alumni as a result of their education.

The total economic impact captures direct spending as well as the indirect and induced effects that ripple through Oregon's economy as university-related dollars circulate through supply chains and household expenditures. The total annual economic impact within the State of Oregon is nearly $1.9 billion, comprised of (Figure 1.1):

- EOU’s total impact of $388.1 million, including direct impacts of $106.5 million, plus indirect and induced impacts of $281.5 million, which demonstrate additional direct impacts beyond Union County, such as spending with vendors throughout the State;
- SOU’s total impact of $730 million, including direct impacts of $198 million, plus indirect and induced impacts of $532 million, which demonstrates the supply chain extending to other cities within the State of Oregon (indirect), and SOU employees living and spending in areas outside of Jackson County (induced); and
- WOU’s total impact of $766.2 million, including direct impacts of $159.6 million, plus indirect and induced impacts of $606.6 million, demonstrating additional direct impacts beyond Polk County.
- In aggregate, the RPUs generate approximately 10,900 direct, indirect, and induced FTE jobs with approximately $524 million in employee compensation.

Figure 1.1: Annual Aggregate Economic Impact of the RPUs of Oregon

Impact Type	EOU	SOU	WOU	Total
Annual Operations, Capital Spending, Ancillary Spending				
Direct Impact ($M)	$106.5	$198.0	$159.6	$464.2
Indirect & Induced Impact ($M)	$63.8	$136.6	$116.6	$317.0
Total Economic Impact ($M)	**$170.3**	**$334.6**	**$276.2**	**$781.1**
Annual Employment Supported (FTE)	**1,440**	**2,140**	**1,990**	**5,570**
Employee Compensation ($M)	**$37.8**	**$84.5**	**$75.2**	**$197.5**
Annual Cumulative Alumni Wage Premium				
Total Economic Impact ($M)	**$217.8**	**$395.4**	**$490.0**	**$1,103.2**
Annual Employment Supported (FTE)	**1,070**	**1,920**	**2,340**	**5,330**
Employee Compensation ($M)	**$64.0**	**$117.9**	**$145.0**	**$326.9**
Total Annualized Impact				
Total Economic Impact ($M)	**$388.1**	**$730.0**	**$766.2**	**$1,884.3**
Annual Employment Supported (FTE)	**2,510**	**4,060**	**4,330**	**10,900**
Employee Compensation ($M)	**$101.7**	**$202.4**	**$220.3**	**$524.4**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

The economic activity generated by the RPUs also produces significant fiscal benefits for the State of Oregon. Although the universities themselves are exempt from property taxes on mission-related facilities, the broader economic activity they support, including employee earnings, supply chain purchases, and household spending, generates personal income tax and business tax revenues at the state level. Additional taxes on lodging and food and beverage purchases are levied at both local and state levels. Figure 1.2 summarizes the aggregate tax revenue impact by institution. In sum, the RPUs generate $98.1 million in fiscal revenues within the State of Oregon.

Figure 1.2: Aggregate Consolidated Tax Revenue Impact in Oregon

Tax Type	EOU	SOU	WOU	Total
Local/County Taxes				
Income Tax	-	-	-	-
Corporate Income Tax	-	-	-	-
Lodging Tax	$29,290	$88,230	$7,670	$125,190
Food & Beverage Tax	-	$1,297,810	-	$1,297,810
Total	**$29,290**	**$1,386,040**	**$7,670**	**$1,423,000**
State Taxes				
Income Tax	$18,594,600	$31,399,130	$41,157,530	$91,151,260
Corporate Income Tax	$1,018,090	$2,284,250	$2,162,730	$5,465,070
Lodging Tax	$5,410	$15,190	$25,560	$46,160
Food & Beverage Tax	-	-	-	-
Total	**$19,618,100**	**$33,698,570**	**$43,345,820**	**$96,662,490**
Aggregate Taxes				
Income Tax	$18,594,600	$31,399,130	$41,157,530	$91,151,260
Corporate Income Tax	$1,018,090	$2,284,250	$2,162,730	$5,465,070
Lodging Tax	$34,700	$103,420	$33,230	$171,350
Food & Beverage Tax	-	$1,297,810	-	$1,297,810
Total	**$19,647,390**	**$35,084,610**	**$43,353,490**	**$98,085,490**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

1.3. Aggregate Annual Economic and Fiscal Impacts by Category

The economic impact of Oregon's Regional Public Universities can be understood through four primary channels of activity: annual institutional operations, capital investments, ancillary spending by students and visitors, and the aggregate annual premium associated with an earned degree. Each channel represents a distinct pathway through which university-related spending enters the economy, supports employment, generates household income, and produces tax revenue. The following subsections present the aggregate statewide impact for each category, combining the contributions of all three RPUs.

Aggregate Economic and Fiscal Impacts from Operations

The largest component of the RPUs' economic impact stems from their annual institutional operations. Across all three universities, operational expenditures encompass compensation for faculty, staff, and student workers; purchases of academic and operational goods and services; and contracted services. These expenditures represent the core engine of each university's economic presence, supporting direct employment on campus and generating indirect and induced effects as operational dollars circulate through statewide supply chains.

Collectively, the three RPUs' annual operations generate $445.2 million in total economic impact within the State of Oregon, supporting 3,740 FTE jobs with $128.6 million in employee compensation. This

operational footprint reflects the universities' combined roles as major employers, purchasers of goods and services, and drivers of household spending across their respective regions and the broader state (Figure 1.3).

Figure 1.3: Annual Aggregate Economic Impact of the RPUs' Operations in Oregon

Impact Type	EOU	SOU	WOU	Total
Direct Impact ($M)	$62.9	$87.4	$92.7	$243.0
Indirect & Induced Impact ($M)	$44.9	$78.6	$78.7	$202.2
Total Economic Impact ($M)	**$107.8**	**$166.1**	**$171.3**	**$445.2**
Annual Employment Supported (FTE)	**1,090**	**1,280**	**1,370**	**3,740**
Employee Compensation ($M)	**$24.5**	**$51.3**	**$52.8**	**$128.6**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

The operational activity of the three RPUs also generates nearly $7.4 million in annual tax revenue for the State of Oregon, including personal income taxes on employee earnings and business-related taxes supported through university supply chain activity (Figure 1.4).

Figure 1.4: Aggregate Consolidated Tax Revenue Impact from the RPUs' Operations in Oregon

Tax Type	EOU	SOU	WOU	Total
Income Tax	$1,193,100	$2,495,800	$2,563,500	$6,252,400
Corporate Income Tax	$186,300	$563,900	$377,900	$1,128,100
Total Tax Impact	**$1,379,400**	**$3,059,700**	**$2,941,400**	**$7,380,500**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Aggregate Economic and Fiscal Impacts from Capital Investments

Oregon's Regional Public Universities make sustained investments in campus infrastructure that strengthen their educational missions while delivering measurable economic benefits to the state. Capital expenditures across the three institutions include new construction and facility modernization. To smooth the inherently uneven nature of capital spending cycles, this analysis uses either a five-year or six-year average of actual and planned capital expenditures from FY2021 through FY2025/FY2026, depending upon data availability, providing a representative view of typical annual capital activity.

These investments generate economic impacts that extend well beyond the construction industry. While construction activity accounts for the largest share of direct impact, the procurement of materials, professional design and engineering services, specialized equipment, and related goods and services support employment and business activity across a wide range of sectors. In aggregate, the RPUs' annualized capital investments generate $47.2 million in total economic impact within the State of Oregon, supporting 230 FTE jobs with $13.6 million in employee compensation (Figure 1.5).

Figure 1.5: Annual Aggregate Economic Impact from the RPUs' Capital Investments in Oregon

Impact Type	EOU	SOU	WOU	Total

Direct Impact ($M)	$9.0	$9.7	$9.8	$28.5
Indirect & Induced Impact ($M)	$4.9	$7.4	$6.3	$18.6
Total Economic Impact ($M)	**$13.9**	**$17.1**	**$16.1**	**$47.2**
Annual Employment Supported (FTE)	**70**	**80**	**80**	**230**
Employee Compensation ($M)	**$4.2**	**$5.0**	**$4.4**	**$13.6**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Capital investment activity also contributes to the state's fiscal base, generating approximately $733,200 in annual tax revenue through the income taxes paid by construction and professional services workers; and the business taxes supported by university-driven construction activity (Figure 1.6).

Figure 1.6: Aggregate Consolidated Tax Revenue Impact from the RPUs' Capital Investments in Oregon

Tax Type	EOU	SOU	WOU	Total
Income Tax	$209,500	$252,200	$221,800	$683,500
Corporate Income Tax	$13,000	$20,200	$16,500	$49,700
Total Tax Impact	$222,500	$272,400	$238,300	$733,200

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Aggregate Economic and Fiscal Impacts from Ancillary Spending

Beyond the universities' direct operational and capital expenditures, Oregon's RPUs generate additional economic activity through the spending of students and visitors, including event attendees. When students purchase food, housing, transportation, and personal goods in the communities surrounding each campus, and when visitors travel to attend athletic events, cultural performances, commencement ceremonies, and admissions programs, their spending supports local businesses and sustains employment in hospitality, retail, food services, and related sectors.

This ancillary spending is distinct from the universities' institutional budgets and represents a separate channel of economic impact that directly benefits the businesses and workers in each university's surrounding community. In aggregate, ancillary spending associated with the three RPUs generates $288.7 million in total economic impact within the State of Oregon, supporting 1,600 FTE jobs with $55.3 million in employee compensation each year (Figure 1.7).

Figure 1.7: Annual Aggregate Economic Impact from the RPUs' Student and Visitor Ancillary Spending in Oregon

Impact Type	EOU	SOU	WOU	Total
Direct Impact ($M)	$34.6	$100.9	$57.1	$192.6
Indirect & Induced Impact ($M)	$14.0	$50.5	$31.6	$96.2
Total Economic Impact ($M)	**$48.6**	**$151.4**	**$88.8**	**$288.7**
Annual Employment Supported (FTE)	**280**	**780**	**540**	**1,600**
Employee Compensation ($M)	**$9.1**	**$28.2**	**$18.1**	**$55.3**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Ancillary spending also generates more than $5 million in annual tax revenue for the State of Oregon, including income taxes, business taxes, and lodging taxes collected on visitor accommodations (Figure 1.8).

Figure 1.8: Aggregate Consolidated Tax Revenue Impact from the RPUs' Student and Visitor Ancillary Spending in Oregon

Tax Type	EOU	SOU	WOU	Total
Income Tax	$458,000	$1,426,100	$916,000	$2,800,100
Corporate Income Tax	$153,800	$485,800	$248,400	$888,000
Lodging Tax	$34,700	$103,420	$33,230	$171,350
Food & Beverage Tax	-	$1,297,810	-	$1,297,810
Total Tax Impact ($M)	**$646,500**	**$3,313,130**	**$1,197,630**	**$5,157,260**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)



1.4. Aggregate Workforce and Alumni Economic Impact

The economic contributions of Oregon's Regional Public Universities extend well beyond the annual cycle of institutional spending and visitor activity. Among the most enduring forms of economic value created by the RPUs is the enhanced earning potential of their graduates. Alumni of Eastern Oregon University, Southern Oregon University, and Western Oregon University earn higher wages than individuals without comparable educational attainment, and this wage premium translates into increased household spending, stronger consumer demand, and greater tax revenue for the State of Oregon.

Collectively, the three RPUs have produced tens of thousands of living alumni who reside and work in Oregon. These graduates serve as teachers, healthcare providers, counselors, law enforcement professionals, business owners, and public servants in communities across the state. The aggregate wage premium earned by RPU alumni generates $1.1 billion in additional household income within Oregon each year, producing $1.1 billion in total economic impact, supporting 5,330 jobs with $326.9 million in employee compensation (Figure 1.9).

Figure 1.9: Annual Aggregate Economic Impact from the Increased Household Income due to the RPUs Alumni in Oregon[1]

Detail	EOU	SOU	WOU	Total
Total Alumni Residing in the State	16,049	26,165	35,824	78,038
Labor Force Participation Rate	70.6%	70.6%	70.6%	70.6%
Estimated Total Working Alumni	11,330	18,473	25,292	55,095
Aggregate Wage Premium ($M)	$230.0	$362.6	$513.4	$1,106.0
Total Impact ($M)	**$217.8**	**$395.4**	**$490.0**	**$1,103.2**
Total Employment (FTE)	**1,070**	**1,920**	**2,340**	**5,330**
Employee Compensation ($M)	**$64.0**	**$117.9**	**$145.0**	**$326.9**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

The alumni wage premium also generates $84.8 million in annual tax revenue for the State of Oregon, including income and corporate income taxes (Figure 1.10).

[1] It is important to note that the top row representing alumni residing in the State of Oregon does not include those alumni living throughout the rest of the country. For economic impact in the context of this study, only those alumni residing within defined geographies are counted for the alumni wage premium.

Figure 1.10: Aggregate Consolidated Tax Revenue Impact from the RPUs' Alumni Wage Premium Oregon

Tax Type	EOU	SOU	WOU	Total
Personal Income Tax (paid on Alumni Wage Premium) ($M)	$13.6	$21.4	$30.3	$65.2
Personal Income Tax (from EOU Alumni Spending) ($M)	$3.2	$5.9	$7.2	$16.2
Total Personal Income Tax ($M)	$16.7	$27.2	$37.5	$81.4
Corporate Income Tax	$0.3	$1.2	$1.5	$3.4
Aggregate Tax Impact ($M)	**$17.4**	**$28.4**	**$39.0**	**$84.8**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)



Industry Distribution of Economic Impact from the Regional Public Universities of Oregon

Each university—EOU, SOU, and WOU—supports a range of industries through the purchase of goods, services, and capital investments; and the circulation of both spending by stakeholders, as well as salaries paid to university employees.

Eastern Oregon University

The indirect and induced impacts of the university's operations are distributed across sectors including Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, Real Estate and

Rental and Leasing, and Other Services (except public administration), reflecting the ways university-related spending circulates throughout the Oregon economy (Figure 1.11). In total, more than 1,350 FTE jobs in other sectors are generated by EOU's indirect and induced economic impacts.

Figure 1.11: Industry Distribution of Induced and Indirect Employment Generated by Eastern Oregon University in Oregon

Sector	Indirect & Induced Employment (Jobs)	% Indirect & Induced Employment
Health Care and Social Assistance	322	24%
Retail Trade	210	15%
Accommodation and Food Services	148	11%
Real Estate and Rental and Leasing	126	9%
Other Services (except Public Administration)	128	9%
All Other Industries	430	32%
Total	**1,364**	**100%**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Southern Oregon University

The indirect and induced impacts of the university's operations are distributed across sectors including Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, Real Estate Rental and Leasing, and Other Services (except Public Administration) (Figure 1.12). In total, nearly 2,350 FTE jobs in other sectors are generated by SOU's indirect and induced economic impacts.

Figure 1.12: Industry Distribution of Indirect and Induced Employment Generated by Southern Oregon University in Oregon

Sector	Indirect & Induced Employment (Jobs)	% Indirect & Induced Employment
Health Care and Social Assistance	557	24%
Retail Trade	336	14%
Accommodation and Food Services	242	10%
Other Services (except Public Administration)	207	9%
Real Estate and Rental and Leasing	195	8%
All Other Industries	812	35%
Total	**2,349**	**100%**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Western Oregon University

The indirect and induced impacts of the university's operations are distributed across sectors including Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, Other Services (except Public Administration), and Real Estate and Rental and Leasing Services (Figure 1.13). In total,

more than 2,860 FTE jobs in other sectors are generated by WOU's indirect and induced economic impacts.

Figure 1.13: Industry Distribution of Induced and Indirect Employment Generated by Western Oregon University in Oregon

Sector	Indirect & Induced Employment (Jobs)	% Indirect & Induced Employment
Health Care and Social Assistance	678	24%
Retail Trade	425	15%
Accommodation and Food Services	300	10%
Other Services (except Public Administration)	259	9%
Real Estate and Rental and Leasing	213	7%
All Other Industries	986	34%
Total	2,861	100%

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Aggregate Workforce Impacts and Labor Force Needs Alignment

Beyond the wage premium, RPU graduates contribute to Oregon's long-term workforce competitiveness by filling critical roles in sectors where labor demand outpaces supply. The RPUs collectively produce a significant share of Oregon's newly licensed teachers, behavioral health counselors, and public service professionals, helping to address persistent workforce shortages that affect communities across the state. The consistent retention of graduates within the state reinforces the institutions' function as a homegrown talent pipeline that sustains regional economies and strengthens the professional capacity of Oregon's employers and public institutions.

By retaining college-age residents who might otherwise leave the state to pursue higher education elsewhere, the RPUs help to ensure that the economic returns of that education—including higher earnings, increased tax contributions, and professional expertise—flow back into Oregon, rather than benefiting other states (Figure 1.14).

- Master's degree holders consistently show higher retention than baccalaureate graduates across all three institutions, with retention rates ranging from 67 percent to 77 percent at the one-year mark.
- Combined, almost 71 percent of RPU graduates remain employed in Oregon one year after graduation, with nearly two-thirds still residing in-state a decade later (65 percent)—a figure that is slightly higher than graduates from the other public four-year institutions in Oregon (62 percent).

Figure 1.14: In-State Retention Fuels Oregon's Economy

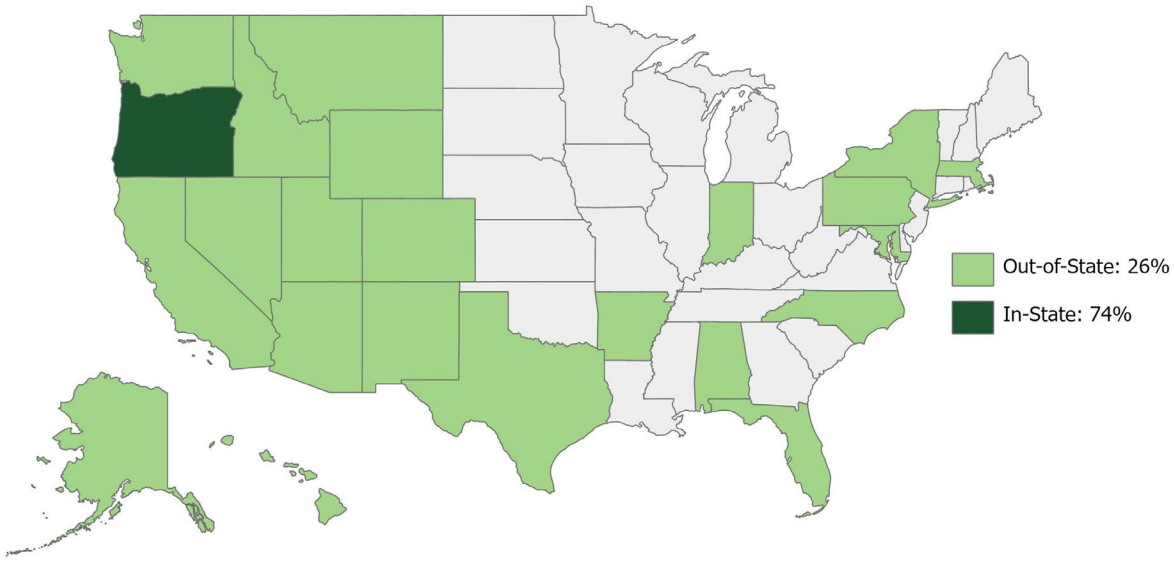
Institution	Degree	1-Yr Employed	1-Yr In-State	1-Yr Retention	5-Yr Employed	5-Yr In-State	5-Yr Retention	10-Yr Employed	10-Yr In-State	10-Yr Retention
EOU	Bachelor's	8,554	5,405	63%	7,585	4,547	60%	4,618	2,673	58%
EOU	Masters	1,668	1,277	77%	1,201	879	73%	724	539	74%
SOU	Bachelor's	10,147	6,857	68%	9,646	5,890	61%	6,449	3,691	57%
SOU	Masters	3,937	2,619	67%	3,100	1,941	63%	2,021	1,226	61%
WOU	Bachelor's	13,573	10,388	77%	12,056	9,075	75%	7,601	5,546	73%
WOU	Masters	3,938	2,972	75%	2,946	2,156	73%	1,922	1,381	72%
Combined	**All Degrees**	**41,817**	**29,518**	**71%**	**36,534**	**24,488**	**67%**	**23,335**	**15,056**	**65%**
All Other 4-Year Public Institutions in OR	**All Degrees**	**221,064**	**155,196**	**70%**	**196,564**	**125,338**	**64%**	**117,273**	**73,219**	**62%**

Source: PSEO(2026)

Proximity to a higher education institution matters, as students who attend university close to home are more likely to build professional networks, complete clinical and student-teaching placements, and ultimately launch careers in the communities where they studied.[2] For many students across rural, southern, and mid-valley Oregon, these institutions represent the most accessible path to a four-year degree without leaving their home. 74 percent of the RPUs' freshmen arrive from in-state locations, demonstrating that State resources largely benefit students from Oregon (Figure 1.15).

[2] Alonso, Johanna. "New Research Emphasizes Importance of College Proximity." Inside Higher Ed, 29 Oct. 2024, www.insidehighered.com/news/institutions/community-colleges/2024/10/29/students-more-likely-enroll-college-based-proximity.

Figure 1.15: In-State Versus Out-of-State Distribution of RPU Incoming Freshmen



Source: Lightcast (2026), ArcGIS (2026), ESI (2026)

The RPUs are not only valuable in terms of educating local college-age citizens, leading to higher incomes for those individuals and their families. They also provide a service to the State of Oregon by educating the local workforce in sectors that are the most relevant to Oregon's economy. Figure 1.16 highlights the share of top RPU programs relative to the total number of programs offered within the entire State of Oregon; demonstrating the RPUs' role in contributing to total degrees within the state, specifically in Multi/Interdisciplinary Studies, Education, Parks/Recreation, and Homeland Security.

Figure 1.16: Top RPU Programs by Completion Compared to Oregon Total

CIP	Program	RPU Completions	Statewide Completions	RPU Share	2025 Oregon Jobs	Median Hourly	Annual Openings
30	Multi/Interdisciplinary Studies	1,061	2,024	52%	687,762	$30.97	85,706
31	Parks, Recreation, Leisure, Fitness, and Kinesiology	179	623	29%	154,866	$33.52	19,701
43	Homeland Security, Law Enforcement, Firefighting and Related Protective Services	148	550	27%	165,565	$38.90	18,913
13	Education	756	3,546	21%	181,633	$29.21	24,377
23	English Language and Literature/Letters	85	585	15%	52,277	$38.38	5,568
16	Foreign Languages, Literatures, and Linguistics	63	434	15%	86,264	$31.73	9,820
05	Area, Ethnic, Cultural, Gender, and Group Studies	22	158	14%	49,758	$40.81	5,517
50	Visual and Performing Arts	194	1,691	11%	184,741	$41.17	20,420
42	Psychology	264	2,306	11%	109,580	$34.13	12,579
54	History	33	295	11%	32,012	$39.24	3,119
09	Communication, Journalism, and Related Programs	102	1,027	10%	105,040	$39.02	11,904
52	Business, Management, Marketing, and Related Support Services	509	5,693	9%	807,490	$31.01	100,679

Source: Lightcast (2026)

Many of these top programs feed directly into industries that are critical to Oregon's economy and communities, including Educational Services, Health Care and Social Assistance, and Public Administration. Figure 1.17 shows how graduates of the ten largest RPU programs who remain in Oregon are distributed across these key sectors. In seven of the ten programs, a majority of in-state graduates work in one of these three industries.

Figure 1.17: Industry Distribution of the RPUs' In-State Alumni, by Program

Top 10 RPU Programs	Education & Support Services	Health Care & Social Assistance	Public Administration	All Other Industries
Multi/Interdisciplinary Studies	38%	16%	11%	35%
Education	77%	5%	4%	14%
Business, Management, Marketing, and Related Support Services	9%	11%	9%	71%
Psychology	17%	39%	9%	35%
Visual and Performing Arts	24%	9%	4%	63%
Parks, Recreation, Leisure, Fitness, and Kinesiology	31%	24%	6%	39%
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	5%	16%	50%	29%
Communication, Journalism, and Related Programs	16%	14%	7%	63%
Social Sciences	19%	27%	16%	39%
Computer and Information Sciences and Support Services	13%	6%	10%	72%
All Programs	**36%**	**15%**	**11%**	**38%**

Source: Lightcast (2026)

Education and Support Services

Oregon's RPUs play a critical role in sustaining the state's education workforce by producing graduates who remain employed in Oregon and contribute directly to high demand service sectors. Across all programs, 36 percent of employed in-state graduates work in Education and Support Services, making it the single largest employment industry represented. Several of the largest RPU program areas demonstrate especially strong alignment with Oregon's education workforce needs.

Education majors show the clearest connection to workforce demand, with 77 percent of graduates within the state employed in Education and Support Services. This concentration is particularly significant given Oregon's ongoing teacher shortages and continued challenges in recruiting and retaining educators across K-12 systems, especially in rural and underserved communities.[3] Because the RPUs are accessible to many students from these communities who may not otherwise have access to higher education opportunities, many graduates ultimately return to serve their home regions as educators and school professionals. In this way, Oregon's RPUs function as an important locally rooted talent pipeline, strengthening workforce stability and helping school districts address long-term staffing gaps across the state.

Other high enrollment programs at RPUs also contribute meaningfully to the education workforce within the state. Multi/Interdisciplinary Studies graduates within Oregon are employed in Education and Support Services at a rate of 36 percent, while graduates in Oregon from Parks, Recreation, Leisure,

[3] "Teacher Shortage Area Report: Oregon, School Year 2025–2026." Teacher Shortage Areas, U.S. Department of Education, Office of Postsecondary Education, 3 June 2026, tsa.ed.gov/#/reports.

Fitness, and Kinesiology programs enter the sector at a rate of 31 percent. Visual and Performing Arts graduates contribute at a rate of 24 percent, and Social Sciences graduates at 19 percent. These fields support a broad educational ecosystem that includes classroom instruction, student support services, recreation programming, arts education, and community engagement functions.

Health Care and Social Assistance

RPUs also make substantial contributions to Oregon's health care and social assistance workforce. Across all programs, 15 percent of graduates who are employed in the state work in health care and social assistance, reflecting the Oregon's RPUs role in supplying the gap in significant labor shortages.[4]

Psychology graduates demonstrate the strongest alignment of the RPUs top programs with this industry, with 39 percent employed in health care and social assistance. Graduates from Parks, Recreation, Leisure, Fitness, and Kinesiology programs also contribute heavily to the sector, with 24 percent employed in health care and social assistance Social Sciences graduates enter the sector at a rate of 27 percent, while Homeland Security, Law Enforcement, Firefighting, and Related Protective Services graduates contribute at a rate of 16 percent. Communication and Journalism graduates and Business graduate also support the sector, each contributing more than one in ten employed graduates within the state.

The breadth of disciplines feeding into health care and social assistance highlights the interconnected nature of Oregon's workforce needs. The sector depends not only on clinical professionals, but also on workers trained in communication, social support, administration, wellness, and public safety. RPUs provide this broad talent base while retaining graduates within Oregon's labor market, reinforcing their importance to statewide workforce resilience and public health outcomes.

Public Administration



RPUs also support Oregon's public sector workforce by preparing graduates who enter careers in government, public safety, and civic administration. Across all programs, 11 percent of graduates who are employed in the state work in public administration, demonstrating the institutions' role in sustaining core public functions throughout the state.

The strongest connection to Public Administration is found among graduates from Homeland Security, Law Enforcement, Firefighting, and Related Protective Services programs, where 50 percent are employed in the sector. Given ongoing recruitment challenges in many public safety occupations, RPUs provide an essential in state pipeline for these critical roles.[5]

Social Sciences graduates also contribute meaningfully to public administration, with 16 percent employed in the sector. Multi/Interdisciplinary Studies graduates contribute at a rate of 11 percent, while Computer and Information Sciences graduates contribute at a rate of 10 percent. These programs support a wide range of government functions, including policy analysis, administrative operations, data systems, information technology, and community services. Business graduates and Psychology

[4] Li, Tao, et al. Oregon's Health Care Workforce Needs Assessment 2025. Oregon Health Authority, Oregon Health Policy Board, Jan. 2025.
[5] Oregon Knowledge Bank. "Recruitment for Public Safety Agencies." State of Oregon. Accessed June 2026. Available at: https://okb.oregon.gov/Pages/recruitment.aspx

graduates also contribute to public sector staffing needs, each with 9 percent employed in public administration.

The data underscores the important relationship between RPUs and Oregon's public workforce infrastructure. By producing graduates who remain employed in state and enter public service occupations, RPUs help ensure continuity in essential government operations and public safety services. Their contribution is especially important in regional communities where recruitment pipelines are often more limited and where locally educated graduates are more likely to remain and work long term.[6]

[6] Sowl et al., Rural College Graduates: Who Comes Home? (2021); Utah Data Research Center, In-State Workforce Retention of Utah's Postsecondary Graduates (2020); American Association of State Colleges and Universities, Issue Summary: Empowering Regional Workforces (2025

Table of Contents

1. The Impact of the Regional Public Universities of Oregon 3
1.1. Overview of Impact 3
1.2. Aggregate Annual Economic and Fiscal Impact by Entity 4
1.3. Aggregate Annual Economic and Fiscal Impacts by Category 6
1.4. Aggregate Workforce and Alumni Economic Impact 10
2. Introduction 22
2.1. Purpose of Report 22
2.2. About Oregon's Regional Public Universities 22
2.3. Report Scope and Methodology 23
2.4. Report Organization 26
3. The Economic Impact of Eastern Oregon University 28
3.1. About Eastern Oregon University 28
3.2. Economic Impact from Eastern Oregon University's Operations 29
3.3. Economic Impact from Eastern Oregon University's Capital Investments 33
3.4. Economic Impact from Eastern Oregon University's Ancillary Spending 36
3.4. The Economic Impact from Eastern Oregon University's Alumni Wage Premium 41
3.5. Eastern Oregon University's Social and Community Impact 45
4. The Economic Impact of Southern Oregon University 50
4.1. About Southern Oregon University 50
4.2. Economic Impact from Southern Oregon University's Operations 51
4.3. Economic Impact from Southern Oregon University's Capital Investments 53
4.4. Economic Impact from Southern Oregon University's Ancillary Spending 56
4.5. The Economic Impact from Southern Oregon University's Alumni Wage Premium 60
4.6. Southern Oregon University's Social and Community Impact 64
5. The Economic Impact of Western Oregon University 68
5.1. About Western Oregon University 68
5.2. Economic Impact from Western Oregon University's Operations 69
5.3. Economic Impact from Western Oregon University's Capital Investments 72
5.4. Economic Impact from Western Oregon University's Ancillary Spending 75

5.5. The Economic Impact from Western Oregon University's Alumni Wage Premium 80
5.6. Western Oregon University's Social and Community Impact 85
Appendix A: Input-Output Methodology 89
Appendix B: Fiscal Impact Modeling 92
Appendix C: About Econsult Solutions, Inc. 93

2. Introduction

2.1. Purpose of Report

The purpose of this report is to articulate the economic, fiscal, workforce, and community impact of Oregon's Regional Public Universities (RPUs): Eastern Oregon University (EOU), Southern Oregon University (SOU), and Western Oregon University (WOU). Collectively, these institutions expand access to higher education, strengthen regional labor markets, and serve as anchor institutions in communities across the state. Through institution-specific analyses of annual operations, capital investment, student and visitor spending, and the long-term workforce contributions of alumni, this report presents both a unified picture of the RPUs' statewide value and a distinct understanding of the role each university plays within its service region.

Because the three RPUs serve different geographies, industries, and student populations, the report is structured to provide both a combined statewide framing and separate institution-level analyses. This approach is intended to support policymakers, university leadership, and regional stakeholders in understanding how each university contributes to Oregon's economic resilience, workforce readiness, and regional vitality.

2.2. About Oregon's Regional Public Universities

Oregon's Regional Public Universities serve as critical access points to higher education and economic opportunity across the state. Together, Eastern Oregon University, Southern Oregon University, and Western Oregon University provide place-based pathways for students to earn degrees, build careers, and contribute to the long-term strength of Oregon's communities and employers. While united by a shared public mission, each institution plays a distinct role in supporting the needs of its surrounding region:

- **Eastern Oregon University (EOU)** serves a large and predominantly rural geography, where it plays an important role in educator preparation, public sector workforce development, healthcare talent pathways, agriculture, and the retention of residents in eastern Oregon communities.

- **Southern Oregon University (SOU)** supports the economy of southern Oregon through workforce development, arts and culture leadership, business and entrepreneurship programs, and strong partnerships with regional employers in education, healthcare, tourism, and community services.

- **Western Oregon University (WOU)** is a critical talent pipeline for the Willamette Valley and broader state, particularly in teacher preparation, public service, behavioral health, and transfer pathways that expand access for Oregon students.

Across all three institutions, the RPUs contribute not only through direct employment and spending, but also through their broader role in producing graduates who remain in Oregon, support employers, and strengthen regional competitiveness over time.

2.3. Report Scope and Methodology

Econsult Solutions, Inc. (ESI) utilizes standard economic modeling techniques to assess the direct economic activity generated by Oregon's Regional Public Universities and translates that activity into overall economic output, employment, earnings, and tax revenue impact. Detailed information on the approach and methodology employed is provided in the appendices of this report.

The study covers Oregon's Regional Public Universities as a combined portfolio of institutions, while also presenting separate institution-specific analyses within the larger report framework. Data inputs regarding each university's institutional activity were provided by the universities and supplemented with verified information from public sources and necessary assumptions. Utilizing the most recent and appropriate datasets, often from fiscal year 2025, each input was carefully assessed.

To assess capital investments, projected activity levels across recent and planned capital cycles were averaged to produce a more representative view of typical annual activity. This approach smooths out the inherently uneven nature of capital expenditures and offers a clearer, annualized depiction of ongoing university capital investment. Accordingly, the analysis reflects a steady-state level of annual capital activity rather than the impact of any single fiscal year.

Figure 2.1: Economic Impact Methodology



Source: Econsult Solutions, Inc. (2026)

The economic impact of Oregon's Regional Public Universities encompasses three distinct types of effects.

- **Direct impacts** are the immediate results of university spending and activities, such as salaries paid to faculty and staff, purchases of academic and operational goods and services, spending by students and visitors, or construction of new campus facilities.
- **Indirect impacts** occur when university spending ripples through the supply chain. Examples of indirect impacts occur when campus food service vendors purchase ingredients from Oregon producers, or when construction contractors buy materials and professional services from in-state suppliers.
- **Induced impacts** arise when university employees, contractors, and supported workers spend their wages in the local economy, such as when faculty and staff purchase housing, dine at local restaurants, or shop at neighborhood businesses.

Together, these three layers of impact create a multiplier effect that amplifies the universities' economic contribution throughout their respective service regions and across the State of Oregon. Throughout the study, fiscal revenues are recorded separately, following each economic impact category.

ESI employs IMPLAN modeling software to estimate these indirect and induced impacts, which are then combined with the direct activity to determine total economic impacts. IMPLAN is a sophisticated economic modeling system that analyzes how money flows through an economy. At its core, IMPLAN tracks how money moves between different sectors of the economy. When one industry spends money, IMPLAN tracks how that spending ripples out to affect other industries. IMPLAN breaks this spending movement down into 528 different industry sectors based on NAICS (North American Industry Classification System) codes. For each sector, it calculates the regional purchase coefficient (RPC), which measures the proportion of local demand for a good or service that is met by local suppliers.

When modeling the impact of Oregon's Regional Public Universities, IMPLAN takes the universities' direct spending data and:

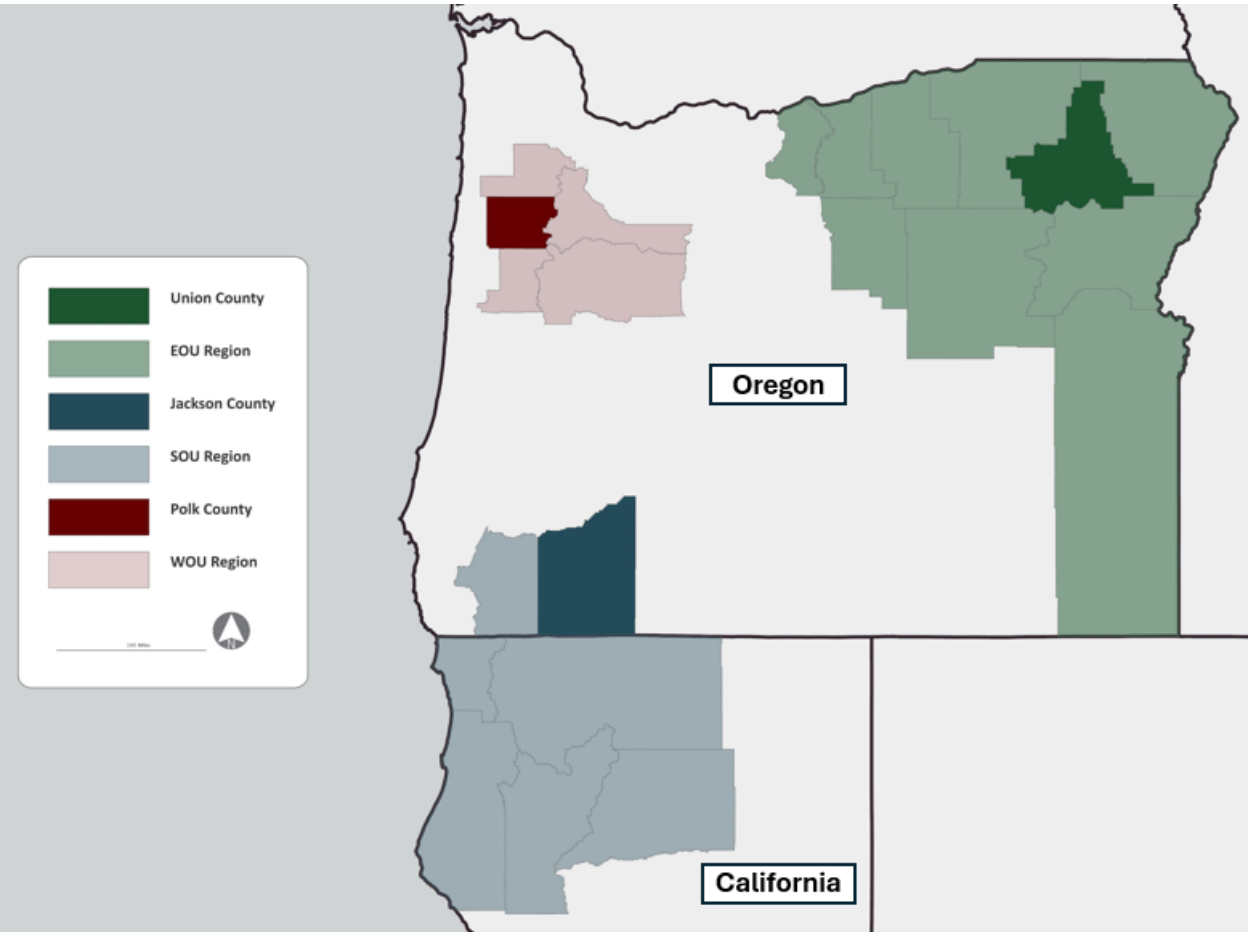
1. Maps it to the appropriate industry sectors;
2. Applies the local RPCs to determine how much spending stays in the region;
3. Uses its matrix of industry relationships to calculate the indirect impacts as that spending ripples through local supply chains;
4. Calculates induced impacts as employees spend their wages locally; and
5. Aggregates all these effects to show total impact on output, employment, and labor income.

IMPLAN incorporates leakage, which is the flow of money leaving a local economy through imports or taxes, to provide a realistic analysis of economic impacts within a specific area. Its advanced modeling capabilities make it a trusted tool for economic impact analysis, widely used by governments, universities, and consulting firms to assess how changes in one sector influence the broader economic system. This reliability has established IMPLAN as a standard in the field.

For the Oregon Regional Public Universities economic impact study, the economic impacts are assessed at three primary concentric geographic levels (Figure 2.2):

- Each university's home county:
    - EOU: Union County
    - SOU: Jackson County
    - WOU: Polk County
- Each institution's region:
    - **EOU Region**: includes Union, Baker, Wallowa, Malheur, Grant, Sherman, Gilliam, Wheeler, Morrow, and Umatilla counties
    - **SOU Region**: includes Jackson and Josephine counties in Oregon; and Siskiyou, Shasta, Trinity, Humboldt and Del Norte Counties of Northern California
    - **WOU Region**: includes Polk, Marion, Yamhill, Linn, and Benton Counties
- State of Oregon

Figure 2.2: Map of EOU, SOU, and WOU Regions



Source: Econsult Solutions, Inc. (2026)

2.4. Report Organization

Following the topline findings presented in Section 1, the remainder of the report is structured to move from institution-specific analyses to a combined statewide synthesis.

- **Section 3: Economic Impact of Eastern Oregon University** presents the economic, fiscal, workforce, and community impact of Eastern Oregon University.
- **Section 4: Economic Impact of Southern Oregon University** presents the economic, fiscal, workforce, and community impact of Southern Oregon University.
- **Section 5: Economic Impact of Western Oregon University** presents the economic, fiscal, workforce, and community impact of Western Oregon University.

Within each university section, the analysis is organized consistently to allow for clear comparisons across institutions, including institutional overview, economic and fiscal impacts, workforce contributions, and community resilience outcomes.



3. The Economic Impact of Eastern Oregon University

3.1. About Eastern Oregon University

Eastern Oregon University (EOU) is a public university located in La Grande, Oregon, situated in the Grande Ronde Valley of Union County at the base of the Blue Mountains. Founded in 1929 as Eastern Oregon Normal School, the institution was originally established to train teachers for the rural communities of eastern Oregon. Over the course of nearly a century, EOU has expanded its academic offerings and institutional mission, evolving through several name changes before becoming Eastern Oregon University in 1997.

In 2018, EOU received the formal designation as Oregon's Rural University, affirming its distinct role in providing place-based higher education to students across some of the state's most geographically remote and underserved communities. The university's main campus spans 110 acres in La Grande, and additional coursework is available through online programs and regional centers located across Oregon, extending EOU's reach well beyond Union County.

EOU enrolls approximately 4,400 students each year. This figure includes both degree-seeking students—roughly 3,000 undergraduate and graduate students pursuing a credential at EOU—and approximately 1,400 non-degree-seeking students, who enroll in coursework (primarily through General Studies and Nursing pathways) without currently matriculating into a degree program. Academic programs are organized across the College of Arts, Humanities, and Social Sciences; the College of Science, Technology, Mathematics, and Health Sciences; and the Colleges of Business and Education. In partnership with Oregon State University, EOU also offers programs in agriculture and rangeland sciences on its La Grande campus, and it hosts a baccalaureate nursing pathway through Oregon Health and Science University.

EOU's academic portfolio reflects its commitment to workforce-aligned education in the fields most critical to eastern Oregon's economy and communities. Programs in education, business, healthcare, agriculture, and the liberal arts prepare graduates to fill essential roles across rural school districts, healthcare systems, local governments, and agricultural enterprises. Approximately 34 percent of EOU students come from low-income families, and 38 percent are first-generation college students, underscoring the university's role as an access point for upward economic mobility in the region.

The Rural Engagement and Vitality Center (REV), a joint venture with Wallowa Resources, brings Eastern Oregon University students to communities across Eastern Oregon to collaborate with local leaders on real-world projects in order to develop future rural leaders. In addition, the Greater Oregon STEM Hub (GO STEM) is a collaborative partnership led by an Advisory Board with representatives from counties in eastern Oregon, whose work centers around STEM awareness, improving STEM educational resources, and advancing rural viewpoints. Through these partnerships, EOU not only delivers academic credentials but also contributes directly to the long-term vitality and economic resilience of the communities it serves.

3.2. Economic Impact from Eastern Oregon University's Operations

Direct Operating Footprint

Eastern Oregon University generates a sizable impact for its county, region, and the State of Oregon, primarily via its annual operating expenditures, which support the institution's core missions of education, workforce development, student support, and community engagement.

Eastern Oregon University's annual operations span its role as a regional public university serving students across eastern Oregon and the broader state. The university employs more than 700 full-time, part-time, adjunct, and student workers, including faculty, administrators, student support professionals, and operational staff, with the primary concentration of employment in Union County; and additional economic linkages extending throughout the region and state. Compensation and benefits for these employees totaled $49.1 million in FY2025, forming the largest share of the university's operating budget, and generating far-reaching economic ripple effects across various sectors.

In total, Eastern Oregon University's annual operating expenditures reached $80.1 million in FY2025, reinforcing its role as a major economic engine for the regional economy and the State of Oregon. To accurately model economic impact, non-circulating expenditures such as depreciation and amortization, totaling $6.4 million, are excluded. Depreciation does not involve actual expenditures, and financing costs do not directly benefit the local or state economies. The resulting $73.7 million in modelable spending reflects the portion of the budget that flows into the local economy, supporting direct, indirect, and induced effects.

Figure 3.1: Summary of Eastern Consolidated Annual Operating Expenditures, FY2025 ($M)

Category	Modeled	Total
Compensation and Benefits	Modeled	$49.1
Services and Supplies	Modeled	$18.7
Scholarships and Fellowships	Modeled	$5.8
Other Expenses[7]	Modeled	$0.0
Modelable Operating Expenses		$73.7
Depreciation and Amortization	Not Modeled	$6.4
Total Operating Expenses		$80.1

Source: Eastern Oregon University (2026), Econsult Solutions, Inc. (2026)

The Economic Impact of Eastern Oregon University Operations

Eastern Oregon University's direct operational spending has a substantial influence on the countywide, regional, and broader State of Oregon economies by stimulating business growth and supporting higher employment levels across a range of industries. The overall economic impact is a combination of direct spending by the university, the indirect effects generated by purchases from a wide range of suppliers, and the induced spending that occurs as university employees spend their wages within their

[7] EOU has "Other Expenses" that are negligible when rounded to $M.

communities. These indirect and induced effects expand as the geographic scope widens, driven by increased purchasing and recirculation within larger areas, which amplifies the multiplier effect.

The total annual economic impact within Union County is $76.0 million, comprised of (Figure 3.2):

- Direct impact of $49.9 million, which includes Eastern Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures; and
- Indirect and induced impact of $26.1 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at Union County restaurants, retailers, and housing providers.
- 830 direct, indirect, and induced jobs with $15.9 million in employee compensation

The total annual economic impact within the EOU Region is $90.2 million, comprised of (Figure 3.2):

- Direct impact of $57.2 million, which includes Eastern Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures; and
- Indirect and induced impact of $33.0 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at EOU Region restaurants, retailers, and housing providers.
- 990 direct, indirect, and induced jobs with $19.0 million in employee compensation

The total annual economic impact within the State of Oregon is $107.8 million, comprised of (Figure 3.2):

- Direct impact of $62.9 million, which reflects university spending with vendors and service providers located throughout Oregon, as well as compensation paid to employees residing outside Union County but within the state;
- Indirect and induced impact of $44.9 million, which reflects the broader statewide supply chain and household spending impacts generated as university-related dollars recirculate across Oregon industries and communities; and
- 1,090 direct, indirect, and induced jobs with $24.5 million in employee compensation.

Figure 3.2: Annual Economic Impact of Eastern Oregon University's Operations

Impact Type	Union County	EOU Region	Oregon
Direct Impact ($M)	$49.9	$57.2	$62.9
Indirect & Induced Impact ($M)	$26.1	$33.0	$44.9
Total Economic Impact ($M)	**$76.0**	**$90.2**	**$107.8**
Annual Employment Supported (FTE)	**830**	**990**	**1,090**
Employee Compensation ($M)	**$15.9**	**$19.0**	**$24.5**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Tax Revenue Impact from Eastern Oregon University's Annual Operations

Although Eastern Oregon University operates as a public institution and is exempt from property taxes on university-owned, mission-related land and facilities, it nonetheless contributes significantly to fiscal revenues within the State of Oregon. While exemptions apply to university property and core educational functions, the university's operations generate substantial tax impacts through the broader economic activity it supports. At the local and state levels, this includes personal income taxes generated through employee earnings and other business-related taxes and fees supported through university-driven supply chain activity. In total, EOU's operations generate almost $1.4 million in tax revenue each year.



Figure 3.3: Estimated Annual Fiscal Impact from Eastern Oregon University's Operations within Oregon

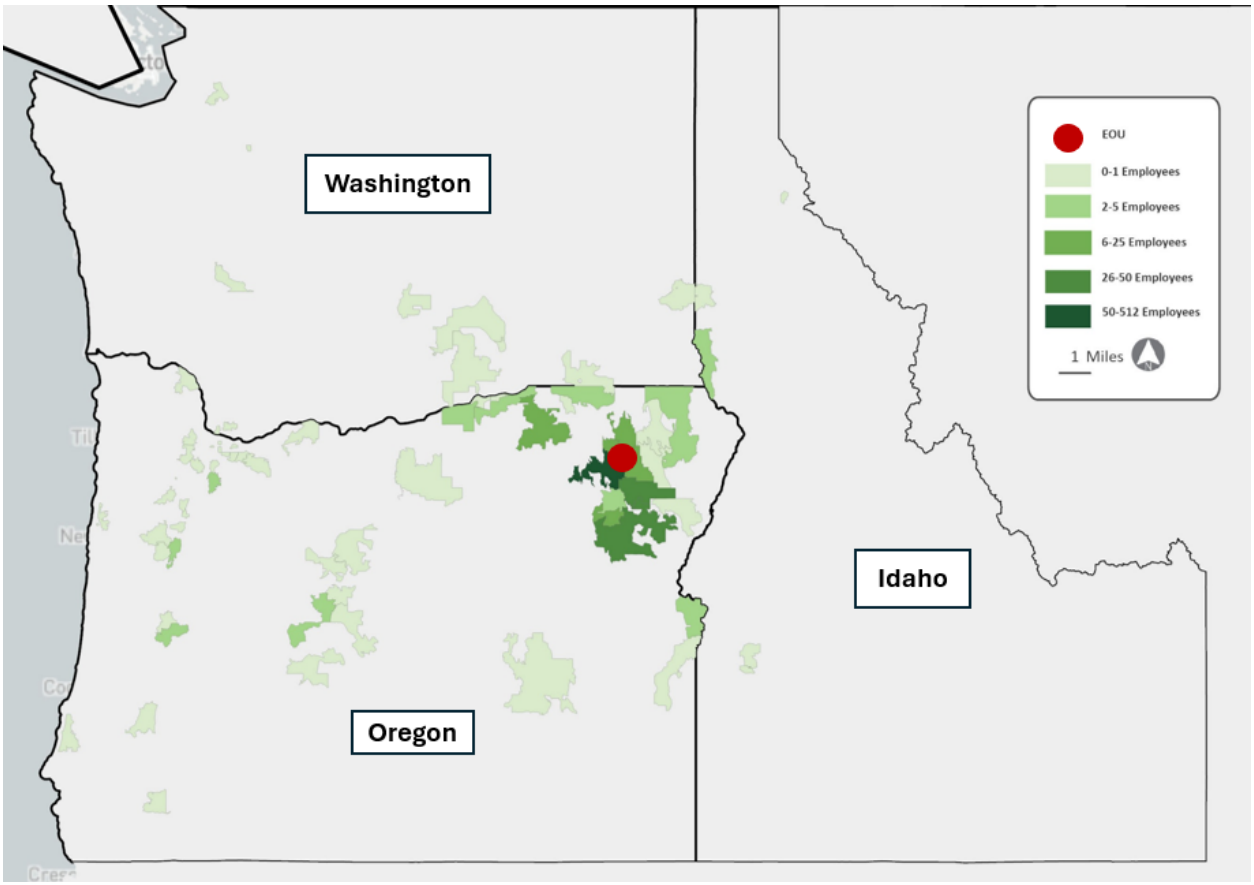
Tax Type	Oregon
Income Tax	$1,193,100
Corporate Income Tax	$186,300
Tax Impact	**$1,379,400**

Source: Econsult Solutions, Inc. (2026), IMPLAN (2024)

Employee Salaries Fuel the Region's Economy

Eastern Oregon University's workforce is concentrated in the communities it serves (Figure 3.4). Because employee earnings recirculate through the places where workers live, this residential pattern underlies the induced impact reported in Figure 3.2 and helps explain why that impact broadens as the geographic scope widens from Union County to the EOU Region and the State of Oregon.

Figure 3.4: EOU Employee Residence



Source: Econsult Solutions, Inc. (2026); ArcGIS (2026); EOU (2026)

3.3. Economic Impact from Eastern Oregon University's Capital Investments

Eastern Oregon University makes significant capital investments each year that strengthen its core educational mission while delivering measurable economic value to the regional economy and the State of Oregon. In FY2025, Eastern Oregon University invested $8.5 million in new construction, deferred maintenance, facility modernization, and campus improvements across academic, student life, and operational infrastructure. These investments not only support university operations and the student experience but also provide a substantial boost to the local construction industry and generate fiscal benefits throughout the region.

More than physical upgrades, these projects reflect a broader commitment to local job creation, campus competitiveness, and long-term regional vitality. As Eastern Oregon University continues to invest in classrooms, student housing, technology infrastructure, and campus support facilities, the economic ripple effects extend across multiple sectors, including construction, professional services, manufacturing, building materials, transportation, and regional supply chains.

Direct Capital Investments

Eastern Oregon University makes sustained capital investments each year to support continued institutional growth and deepen its economic and community impact. Between FY2021 and FY2025, over $45 million has been spent on capital improvements across the university's footprint, with most of the investment focused in Union County, reaffirming the university's long-standing role as an anchor in the region.

Additional investments may also be planned across academic facilities, student life infrastructure, deferred maintenance, and campus modernization projects, reflecting the university's continued commitment to student success and long-term institutional competitiveness.

These projects are not only foundational to Eastern Oregon University's academic mission; they also generate significant regional economic activity, support job creation, and drive local business engagement. Looking ahead, these investments position the university to remain at the forefront of educational access, workforce preparation, and regional partnership while continuing to deliver long-term value to the communities it serves.

To estimate the net new impact from capital investments, ESI estimated the annual capitalized costs such as hard construction costs, design costs, and repair and maintenance costs that represent new, productive investments made each year. It is worth noting that the model does not consider non-capitalized costs and assets such as land acquisitions and furniture.



Figure 3.5: Estimated Annual Average Capital Expenditure, FY2021-FY2025 ($M)

	FY21	FY22	FY23	FY24	FY25	5-Year Total	5-Year Average
Eastern Oregon University	$10.4	$9.4	$5.5	$11.3	$8.5	$45.2	$9.0

Source: Eastern Oregon University (2026), Econsult Solutions, Inc. (2026)

Economic Impact from Capital Investments

Eastern Oregon University spends an average of $9 million per year on capital investments and plays a critical role in driving economic activity at both the local and state levels. Beyond the direct spending on construction, deferred maintenance, and infrastructure modernization, these investments generate broader economic impacts through procurement from a diverse network of suppliers. As spending flows through the economy, it supports job creation and business growth across multiple sectors. The scale of these indirect and induced effects grows with geographic reach, as dollars circulate more broadly across jurisdictions, enhancing the overall multiplier effect and reinforcing the university's role as a sustained economic engine.

The annualized economic impact within Union County is $12.3 million, comprised of (Figure 3.6):

- Direct impact of $9.0 million, which includes Eastern Oregon University's direct capital investments within Union County;
- Indirect and induced impacts of $3.3 million, which includes business-to-business expenditures within the supply chain, as well as employee spending at Union County restaurants, retailers, and housing providers; and
- 70 direct, indirect, and induced jobs with $3.8 million in employee compensation.

The annualized economic impact within the EOU Region is $13.5 million, comprised of (Figure 3.5):

- Direct impact of $9.0 million;
- Indirect and induced impact of $4.5 million, which includes business-to-business expenditures within the supply chain, as well as employee spending at EOU Region restaurants, retailers, and housing providers; and
- 70 direct, indirect, and induced jobs with $4.1 million in employee compensation.

The annualized economic impact within the State of Oregon is $13.9 million, comprised of (Figure 3.5):

- Direct impact of $9.0 million;
- Indirect and induced impacts of $4.9 million, which reflects the statewide supply chain extending to other communities and industries throughout Oregon; and
- 70 direct, indirect, and induced jobs with $4.2 million in employee compensation

Figure 3.6: Estimated Annual Economic Impact of Eastern Oregon University

Impact Type	Union County	EOU Region	Oregon
Direct Impact ($M)	$9.0	$9.0	$9.0
Indirect & Induced Impact ($M)	$3.3	$4.5	$4.9
Total Economic Impact ($M)	**$12.3**	**$13.5**	**$13.9**
Annual Employment Supported (FTE)	**70**	**70**	**70**
Employee Compensation ($M)	**$3.8**	**$4.1**	**$4.2**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Eastern Oregon University's Capital Investments Generate Tax Revenue

Although Eastern Oregon University operates as a public institution, its capital investments generate meaningful tax revenue for the State of Oregon. These investments drive construction activity and support local contractors, design professionals, material suppliers, and service providers, which in turn generate income tax and business-related tax revenues at the state level.

Importantly, the economic activity supported by this spending extends beyond the construction sector, generating ripple effects across a variety of industries and contributing to broader fiscal impacts. In

total, Eastern Oregon University's direct capital investments are estimated to generate nearly $222,500 in tax revenue for the State of Oregon each year (Figure 3.7).

Figure 3.7: Estimated Annual Fiscal Impact of Capital Investments from Eastern Oregon University

Tax Type	Total
Income Tax	$209,500
Corporate Income Tax	$13,000
Aggregate Tax Impact	**$222,500**

Source: Econsult Solutions, Inc. (2026), IMPLAN (2024); Oregon ACFR (2025)

3.4. Economic Impact from Eastern Oregon University's Ancillary Spending

Eastern Oregon University's presence generates substantial economic benefits that extend far beyond its direct operational and capital investments. When students, visitors, family members, prospective students, athletics attendees, and conference or event participants spend money off-campus—at local restaurants, retail stores, hotels, or entertainment venues—they support a wide array of local businesses and sustain jobs across Union County, the EOU Region, and the State of Oregon. These ancillary expenditures also generate meaningful tax revenues for both local and state jurisdictions.

While core spending such as tuition and university-owned housing is captured within Eastern Oregon University's operational impact, the additional off-campus spending by students and visitors creates critical economic opportunities for surrounding communities. These impacts are especially pronounced in the hospitality, retail, lodging, and food service sectors, further reinforcing Eastern Oregon University's role as a cornerstone of the region's economic vitality.

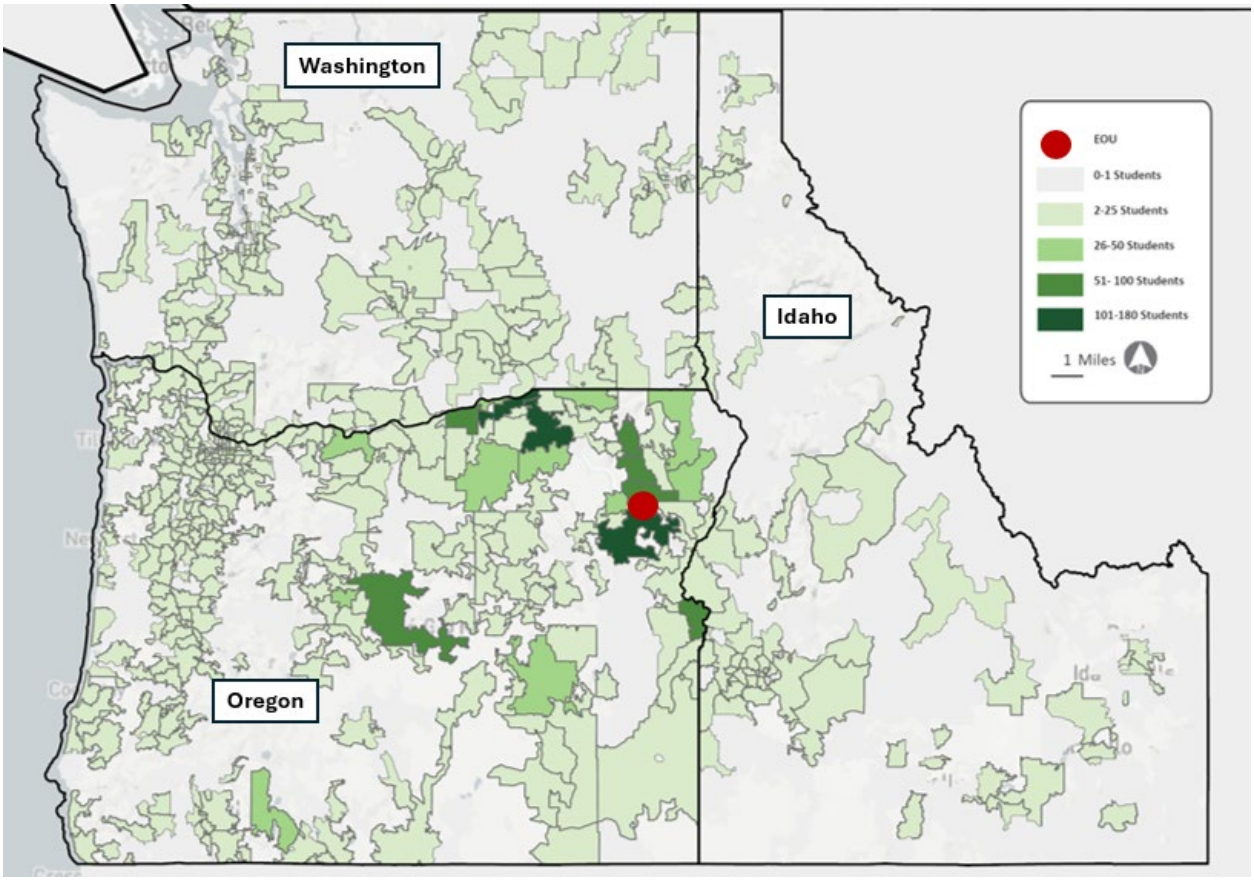
Based on conservative estimates combining Eastern Oregon University's direct data and research-based assumptions, this ancillary spending generates a considerable economic impact within Union County, the EOU Region, and the State of Oregon.

In aggregate, the economic impact of ancillary spending by students, visitors, and university event attendees is $58.8 million within the State of Oregon, supporting 330 jobs with $10.8 million in employee compensation each year.

Students Fuel the Local Economy

Eastern Oregon University draws its student body primarily from the region it anchors. However, the institution also draws in students from across the greater region; and, in particular, from the States of Washington and Idaho (Figure 3.8). This geographic reach reflects the university's role as an accessible four-year option for students across eastern Oregon, as well as for the greater region. Many EOU students remain in the region post-graduation to live and work.

Figure 3.8: EOU Student Origin Map



Source: Econsult Solutions, Inc. (2026); ArcGIS (2026); EOU (2026)

Eastern Oregon University Direct Student Spending

Students' economic impact on Eastern Oregon University's surrounding region extends beyond tuition payments to include substantial off-campus, or "ancillary," spending on necessities, services, and entertainment. This spending—distinct from the university's operational footprint—does not flow directly to Eastern Oregon University but instead circulates within the local economy. It reflects either new economic activity from out-of-state and out-of-region students or retained local spending that might otherwise have left the region had local students chosen to attend college elsewhere.

In Oregon, and according to institutional financial aid data and modeled student budgets for FY2025, estimated annual costs of attendance—not including tuition and other expenses paid directly to the university—total $3.6 million for on-campus students, $39.2 million for off-campus students, and $8.2 million for commuting students (those living with family). This analysis carefully distinguishes between institutional revenue and off-campus expenditures.

For example, off-campus housing costs paid by non-commuting students are included as ancillary spending because they represent new injections into the Union County rental market, while housing costs for commuter students are excluded, as they would likely be incurred regardless of enrollment at

Eastern Oregon University. However, food, transportation, retail, and entertainment purchases made by commuter students while attending the university are included in the analysis as true local economic impacts (Figure 3.9).

Figure 3.9: Estimated Annual Aggregate Ancillary Student Spending by Student Type

Student Type	Degree-Seeking Students	Non-Degree-Seeking Students	Total Students	Per Student Ancillary Spending	Aggregate Ancillary Spending ($M)
Undergraduate					
On-Campus	388	34	422	$16,584	$3.5
Off-Campus	1,249	1,129	2,378	$14,526	$34.5
Commuters	854	75	929	$8,229	$7.6
Graduate					
On-Campus	27	2	29	$7,824	$0.1
Off-Campus	422	168	590	$7,824	$4.6
Commuters	61	4	65	$7,824	$0.5
Total	**3,001**	**1,412**	**4,413**		**$50.9**

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

The analysis accounts for the geographic distribution of student spending, recognizing that not all expenditures remain within the immediate area, particularly given online shopping patterns and student purchases made outside Union County. A portion of this spending exits the region immediately, thus lacking a multiplier effect within the local economy.

To address this, ESI's modeling approach conservatively incorporates only the retail margin (i.e., the difference between the purchase price for the retailer and the sales price paid by the customer). Of the estimated $50.9 million in annual student ancillary spending, approximately $38.6 million circulates within Union County's economy; and $50.9 million circulates within the EOU Region and the State of Oregon (Figure 3.10).

These figures reflect careful consideration of student spending patterns across different geographic boundaries and provide a conservative estimate of the share of spending that truly generates local and statewide economic effects.

Figure 3.10: Estimated Annual Aggregate Ancillary Student Spending Capture of EOU within Union County, the EOU Region, and Oregon

Student Type	Union County	EOU Region	Oregon[8]
On-Campus	$3.2	$3.6	$3.6
Off-Campus	$31.3	$39.2	$39.2
Commuters	$4.1	$8.2	$8.2
Total	**$38.6**	**$50.9**	**$50.9**

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

Eastern Oregon University Direct Visitor Spending

Eastern Oregon University serves as an important year-round visitor destination, drawing a wide array of guests to its campus from across Oregon and beyond. These visitors make meaningful contributions to the regional economy through spending that supports local jobs and generates tax revenues for the State of Oregon.

The university's visitor base includes alumni, parents, prospective students, cultural and athletic event attendees, and participants in conferences, academic programs, and summer camps. To accurately quantify the economic impact of these visits, detailed spending profiles were developed based on visit purpose, trip length, travel distance, event type, and visitor demographics, acknowledging that different categories of visitors have distinct spending behaviors.

Aggregate annual Eastern Oregon University visitor spending estimates were developed using attendance and participation data provided by the university. These data were combined with per-visitor spending profiles segmented by industry, such as lodging, food services, retail, and transportation.

As with student spending, conservative geographic assumptions were applied to estimate the share of spending captured within Union County, while excluding expenditures already reflected in Eastern Oregon University's operational budget. Attendees traveling from less than 50 miles away are classified as local; those arriving from 50–100 miles away are categorized as day trips; and those traveling more than 100 miles are considered overnight guests. Figure 3.11 displays visitation figures by event type and estimated visitor geography of origin.

[8] Spending by students is concentrated around the campus area in Union County, with some students living outside of the county and commuting to campus. These students may spend money throughout the EOU Region, however it is assumed that no additional spending by EOU students occurs within the remainder of the state.

Figure 3.11: Estimated Aggregate Annual Spending by Eastern Oregon University Visitors, by Category of Origin

Reason for Visit	Local	Daytrip	Overnight	Total Visitors
Commencement	110	57	272	438
Athletics	12,612	2,365	788	15765
Admissions	41	179	593	812
Move-In	272	141	673	1086
Summer Residents	269	96	19	384
Homecoming	495	660	495	1,650
Campus Events	490	175	35	700
Total Visitors	**14,289**	**3,673**	**2,875**	**20,835**

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

Economic Impact from Ancillary Spending by Students and Visitors

Ancillary spending by students, visitors, and event attendees has a multiplier effect throughout the region, generating the following annual economic impacts (Figure 3.12):

- $34.0 million in total output within Union County, supporting 200 jobs with $6.2 million in earnings;
- $47.3 million in total output within the EOU Region, supporting 270 jobs with $8.7 million in earnings; and
- $48.6 million in total output within the State of Oregon, supporting 280 jobs with $9.1 million in earnings.

Figure 3.12: Estimated Annual Economic Impact from Ancillary Spending by EOU Students and Visitors

Impact Type	Union County	EOU Region	Oregon
Direct Impact ($M)	$26.4	$34.6	$34.6
Indirect & Induced Impact ($M)	$7.6	$12.7	$14.0
Total Economic Impact ($M)	**$34.0**	**$47.3**	**$48.6**
Annual Employment Supported (FTE)	**200**	**270**	**280**
Employee Compensation ($M)	**$6.2**	**$8.7**	**$9.1**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2026)

Eastern Oregon University Ancillary Spending Generates Tax Revenue

In aggregate, ancillary spending by students and their visitors, prospective students, and other university event guests generates more than $0.6 million in annual tax revenues to the State of Oregon (Figure 3.13).

Figure 3.13: Estimated Aggregate Annual Tax Revenue Impact from Ancillary Spending by EOU Students and Visitors

Tax Type	Oregon
Income Tax	$458,000
Corporate Income Tax	$153,800
Hotel Tax	$5,400
Total	**$617,200**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

In addition to state taxes, EOU also generates local taxes through transient lodging taxes (TLTs). These taxes are levied at the city and county level for La Grande and Union County, as well as at the state level in Oregon. In total, spending activity associated with EOU generates nearly $35,000 in TLTs (Figure 3.14).

Figure 3.14: Estimated TLT Tax Revenue Impact from Ancillary Spending by EOU Students and Visitors

Tax Type	Tax Revenue Generated
La Grande TLT (6%)	$18,460
Union County TLT (3%)	$10,830
Oregon TLT (1.5%)	$5,410
Total Tax Impact	**$34,700**

Source: Econsult Solutions, Inc. (2026); City of La Grande (2026); Union County (2026); Oregon Dept. of Revenue (2026)

3.4. The Economic Impact from Eastern Oregon University's Alumni Wage Premium

Eastern Oregon University's economic impact extends well beyond its direct operations, capital investments, and ancillary spending by students and visitors. Among its most far-reaching contributions is the economic value generated through its core educational mission. An Eastern Oregon University degree translates into enhanced earning potential for its graduates, particularly in fields that are critical to the economies of Union County, the EOU Region, and the State of Oregon. This wage premium—the additional income earned by Eastern Oregon University alumni relative to individuals without the same level of educational attainment—creates lasting economic value that reverberates across the regions where alumni live and work.

By equipping graduates with in-demand credentials, applied knowledge, and workforce-relevant skills, Eastern Oregon University fosters a more competitive and resilient regional workforce. Alumni contribute to local economies not only through their elevated earnings and household spending, but also as educators, healthcare professionals, business leaders, public servants, and community anchors. This sustained wage premium bolsters long-term regional prosperity and reinforces Eastern Oregon University's role as a driver of upward mobility, talent retention, and economic growth.

As of FY2025, Eastern Oregon University's alumni network includes more than 19,000 graduates, with 16 percent residing in Union County; 32 percent in the EOU Region (including Union County); and 66 percent residing in Oregon (including the EOU Region). The value of an Eastern Oregon University degree corresponds to an annual wage premium of approximately $54.2 million in Union County, $112.7 million in the EOU Region, and nearly $230 million within the State of Oregon. This additional household income generates further spending within the region, stimulating spillover economic impact.

Within Union County, the wage premium leads to $40.9 million in economic impact, supporting 230 jobs with $11.2 million in employee compensation. The Eastern Oregon University alumni wage premium leads to $79.9 million in economic impact, supporting 440 full-time jobs with $21.9 million in employee compensation within the EOU Region; and $217.8 million in economic impact, supporting 1,070 full-time jobs with $64 million in employee compensation in Oregon.

The wage premium and subsequent increased alumni spending within Oregon increases the tax base, thereby generating approximately $17.4 million in taxes for Oregon.

Defining Alumni Wage Premium

In today's knowledge-driven economy, the education and intellectual capital of workers are among the most valuable assets influencing organizational productivity and regional competitiveness. Individuals who graduate from Eastern Oregon University, equipped with specialized expertise, advanced credentials, and workforce-relevant skills, are rewarded with higher wages in the labor market. These elevated earnings reflect both the practical value of an Eastern Oregon University education and the institution's strong alignment with the needs of employers across Union County, the EOU Region, and the State of Oregon.

While the wage premium calculations provide valuable insight into earnings associated with degree attainment, they do not capture the full economic benefit of Eastern Oregon University's educational pathways. Clinical placements, educator preparation experiences, internships, applied learning opportunities, and other workforce-aligned experiential programs significantly enhance participants' long-term earning potential through skill development, professional networks, and direct pathways into Oregon's labor market. These valuable career advancement mechanisms, though not fully quantified in the current wage data, represent additional economic impact pathways through which the university contributes to individual earning capacity and regional economic strength.

Wage premium analysis quantifies the broader economic benefit generated by degree-earning Eastern Oregon University alumni. The analysis estimates the additional income earned by graduates within Union County, the EOU Region, and the State of Oregon, translating that income into increased household spending. This increased spending supports regional jobs, stimulates business activity, and generates state tax revenue. In aggregate, this enhanced earning power results in millions of additional dollars circulating through Oregon's economy each year, underscoring the enduring impact of Eastern Oregon University on regional prosperity, workforce resilience, and upward mobility.

Direct Alumni Wage Premium

Data provided by Eastern Oregon University indicate that approximately 16,000 alumni reside in Oregon, reflecting Eastern Oregon University's strong role in retaining graduates within the state and supporting local and regional workforce needs. A meaningful share of these alumni remain in eastern Oregon and surrounding rural communities, reinforcing the university's contribution to talent retention and long-term regional resilience. Of those living alumni, it is assumed that 70.6 percent are currently employed (as opposed to retired, unemployed, or otherwise out of the workforce) (Figure 3.15).

Figure 3.15: Distribution of Eastern Oregon University Alumni in the Workforce

Degree Type	Residing in Union County	Residing in EOU Region (minus Union County)	Residing in the Rest of Oregon (minus EOU Region)	Total
Bachelor's	3,236	3,068	6,880	13,185
Advanced	542	1,020	1,302	2,864
Total Alumni	3,778	4,088	8,182	16,049
Labor Force Participation Rate	70.6%	70.6%	70.6%	70.6%
Estimated Total Working Alumni	**2,667**	**2,886**	**5,777**	**11,330**

Sources: Bureau of Labor Statistics (2026); Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

An aggregate increase in earning potential across each geography can be estimated by analyzing both the overall rise in educational attainment within the workforce and the wage premium specifically associated with an Eastern Oregon University degree. Drawing upon federal data and institutional analysis, the average annual wage premium attributable to increased educational attainment for Eastern Oregon University alumni is estimated to be approximately $20,300 for bachelor's degree holders and $20,200 for advanced degree holders within Oregon.

The individual wage premium was calculated as the difference between median earnings for Eastern Oregon University alumni at various degree attainment levels and the median earnings for all Oregon residents at one degree attainment level below. For example, the wage premium for an Eastern Oregon University alumnus with a bachelor's degree living in Oregon equals the median earnings of Eastern Oregon University alumni with bachelor's degrees minus the median earnings for all Oregon residents with an associate's degree or professional certificate (Figure 3.16).

Figure 3.16: Per Alumnus(a) and Aggregate Alumni Wage Premiums by Degree Type

Degree Type	Eastern Oregon University Employed Alumni	EOU Wage Premium per Alumnus(a)	Total Modeled AWP ($M)
Bachelor's Degree	9,308	$20,300	$189.0
Advanced Degree	2,022	$20,200	$40.8

Sources: American Community Survey (2024); College Scorecard (2026); Econsult Solutions, Inc. (2026)

The wage premium is then applied to the estimated number of Eastern Oregon University alumni working within Union County, the EOU Region, and across the rest of Oregon, segmented by degree level. The resulting aggregate wage premium reflects the additional household income earned by alumni as a direct outcome of the education, credentials, and workforce preparation they received at Eastern Oregon University.

In total, the annual wage premium is estimated to generate approximately $54.2 million in additional earnings within Union County; $112.7 million of additional earnings in the EOU Region; and $230.0 million across the rest of Oregon, representing a significant and sustained contribution to regional economic growth, talent retention, and household spending capacity (Figure 3.17).

Economic Impact from Alumni Wage Premium

The additional earning potential associated with an Eastern Oregon University degree has both direct and consequential impacts on the university's alumni. Beyond the benefits to individual graduates, the wage premium generated by Eastern Oregon University alumni produces a spillover impact on regional economies because alumni have greater disposable income to spend within Union County, the EOU Region, and across Oregon.

The effects of this additional household spending are estimated to generate on an annual basis (Figure 3.15):

- $40.9 million in economic impact within Union County, supporting 230 direct, indirect, and induced jobs with $11.2 million in employee compensation;
- $79.9 million in economic impact within the EOU Region, supporting 440 direct, indirect, and induced jobs with $21.9 million in employee compensation; and
- $217.8 million in economic impact within the State of Oregon, supporting 1,070 direct, indirect, and induced jobs with $64 million in employee compensation.

Figure 3.17: Annual Economic Impact Attributable to Eastern Oregon University Wage Premium Effects within Union County, the EOU Region, and Oregon

Impact Type	Union County	EOU Region	Oregon
Direct Wage Premium ($M)	$54.2	$112.7	$230.0
Total Impact ($M)	**$40.9**	**$79.9**	**$217.8**
Employment Supported (FTE)	**230**	**440**	**1,070**
Employee Compensation ($M)	**$11.2**	**$21.9**	**$64.0**

Sources: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026); IMPLAN (2024)

Alumni Wage Premium Generates Tax Revenue

Increased household income also translates into increased tax revenue for the State of Oregon, where many Eastern Oregon University alumni reside and work. Oregon realizes additional tax revenue via the Eastern Oregon University alumni wage premium through higher personal income tax collections and business-related tax revenues supported by increased household spending.

Furthermore, the wage premium indirectly generates additional revenue through the broader economic activity generated as alumni spend their higher earnings across Oregon's economy. In total, $17.4 million in tax revenue is generated statewide from Eastern Oregon University's alumni wage premium (Figure 3.18).

Figure 3.18: Fiscal Impacts of the Wage Premium Associated with Eastern Oregon University in Oregon ($M)

Tax Type	Oregon
Personal Income Tax (paid on Alumni Wage Premium)	$13.6
Personal Income Tax (from EOU Alumni Spending)	$3.2
Total Personal Income Tax	$16.7
Corporate Income Tax	$0.7
Aggregate Tax Impact	**$17.4**

Sources: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026); Oregon ACFR (2024)

3.5. Eastern Oregon University's Social and Community Impact

EOU offers the lowest undergraduate tuition among Oregon's public universities. The University's mission emphasizes connecting rural regions to a wider world through integrated liberal arts and professional programs, and its values of interdependence and altruism are operationalized through deep, sustained partnerships with K–12 schools, local governments, tribal nations, healthcare providers, arts organizations, and community nonprofits across Eastern Oregon (Figure 3.19).

Figure 3.19: Community and Civic Organization Partnerships

Organization
City of La Grande
City of Joseph
La Grande School District
Union County School District
Greenwood Parent Teacher Support
Confederated Tribes of the Umatilla Indian Reservation
Union County Chamber of Commerce
Grant County Chamber of Commerce
Boardman/North Morrow Chamber of Commerce
Baker County Unlimited
Union County Fair Association
Eastern Oregon Livestock Show Association
Pendleton Round-Up Association
Ontario Recreation District
Wallowa Resources
Blues Intergovernmental Council
Gilliam County Soil and Water Conservation District
Grande Ronde Hospital
St. Anthony Hospital

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)



EOU's social impact begins with a robust K–12 engagement pipeline that supports educational access and workforce development across rural communities. The University's GO STEM initiative alone has reached over 19,000 students through 181 STEM events and generated nearly 140,000 hours of direct student engagement, supported by almost 300 industry volunteers. The Reading Clinic at EOU has trained more than 350 teachers and administrators since 2021 and currently provides free tutoring to students across multiple sites in Union County and Ontario. The Oregon Teacher Pathway™, which has grown from 3 partnerships in 2014 to 8 today, has engaged 476 high school students to date; 34 percent of participants matriculated to EOU, the program maintains a 91 percent university retention rate, and 85 percent of its 65 alumni are currently teaching in their home regions. EOU also hosts annual Future Business Leaders of America (FBLA), the National FFA Organization (FFA), and science competitions that collectively bring over 1,000 students and advisors to campus each year, often providing their first exposure to a university setting (Figure 3.20).

Figure 3.20: K-12 and Youth Engagement Programs

Program	Key Metrics
GO STEM Initiative	19,054 students reached; 181 STEM events; 139,594 hours of student engagement; 284 industry volunteers
EOU Reading Clinic	350+ teachers trained since 2021; 138 students tutored (AY24–25); expanded to 6 regional sites
Oregon Teacher Pathway™	476 HS students; 34% matriculated to EOU; 91% university retention; 65 alumni, 85% teaching in home regions
Teach Rural Oregon / ORTC	39 MAT candidates awarded tuition remission (~$180K); $500K+ in grants (2025–27); all graduates teaching in rural schools
Spanish Dual Credit / World Language Day	9 PLCs; 21 dual credit courses; 276 HS students served; 150+ attendees at World Language Day
FBLA Regional Competition	~500 students and 80 advisors annually (20+ year tradition)
FFA Competitions & Advisor Conference	~520 students/advisors across three annual events
HS Math Competition / Investigators in Science	280 middle and high school students annually

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)



EOU serves as a vital cultural anchor for communities across the region and beyond. The College of Arts, Humanities and Social Sciences (CAHSS) supports an extensive calendar of arts programming: holiday and winter music performances regularly sell out the 436-seat McKenzie Theatre across three or more shows, community choir, band, and Grande Ronde Symphony performances draw 200 to 450 attendees each, and the theatre program offers 14 performances per academic year with audiences reaching up to 400. The Nightingale Gallery's Annual High School Exhibition brings students from 10 to 12 regional high schools to campus, while the Eastern Oregon Film Festival, the Ars Poetica reading series, and the American Democracy Project provide additional public programming throughout the year. In partnership with the Confederated Tribes of the Umatilla Indian Reservation (CTUIR), EOU sponsors tribal

members to teach Native American Literature, Culture, and the Umatilla Language sequence and is developing dual credit pathways for high school students studying the Umatilla language.

Figure 3.21: Arts and Cultural Programming

Program / Venue	Attendance Range	Frequency
Music Performances (Holiday/Winter)	436 per show (sold out)	3+ shows/year
Theatre Productions	112–400 per show	14 shows/year
Community Choir/Band	200–450 per show	Multiple/year
Grande Ronde Symphony	200–450 per show	Multiple/year
Nightingale Gallery / HS Exhibition	100+ at opening	Annual
Eastern Oregon Film Festival	80–100 per screening	Annual
American Democracy Project	20–30 per event	3–4 events/year

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

The University directs substantial institutional aid to rural students: in the current award year, EOU awarded almost $6.5 million in institutional scholarships, grants, and fee remissions, of which nearly $1.2 million in net awards went to students from rural ZIP codes classified as RUCA 4–10 under the USDA's rural–urban commuting area framework. Figure 3.21 presents the distribution of institutional aid by rural classification. Beyond financial aid, EOU operates regional enrollment offices in Enterprise, Pendleton, Ontario, and Roseburg, and maintains co-admission and co-enrollment agreements with Blue Mountain Community College and Mt. Hood Community College to further reduce barriers for rural and place-bound learners.

Figure 3.22: Institutional Aid by Rural Classification (2025–26)

Student Group	Net Awarded ($M)	Share of Total
Rural Students (RUCA 4–10)	$1.2	18%
Non-Rural Students (RUCA 1–3)	$1.0	16%
Unknown / Unmatched	$4.3	66%
All Institutional Aid	**$6.5**	**100%**

Source: Eastern Oregon University (2026); Econsult Solutions, Inc. (2026)

EOU embeds experiential learning into community settings through structured internship programs and applied research partnerships. The Rural Engagement and Vitality (REV) Center has placed approximately 71 student interns since 2020 with organizations including the Blues Intergovernmental Council, Wallowa Resources, La Grande School District, Gilliam County Soil and Water Conservation District, and the cities of Joseph and La Grande. REV's partnership with Wallowa Resources has

channeled over $100,000 in federal funds to EOU faculty for the BIC Socioeconomic Analysis and Northern Blues Forest Collaborative, supporting novel resilience index research and Forest Service economic impact work. Across the broader institution, community internship placements span healthcare (Grande Ronde Hospital, St. Anthony Hospital, St. Luke's), public safety (Union County Parole and Probation), technology (Columbia Memorial Hospital, Pointil), and natural resources (Oregon Department of Fish & Wildlife). The Urban Rural Ambassadors program, a partnership among CAHSS, the REV Center, and the National Policy Consensus Center, engages up to 20 EOU and Portland State University students annually in work with rural and urban entities, systems managers, and private business owners.

EOU's social impact extends well beyond formal programs through the civic engagement of its faculty and staff. A 2026 survey of 78 EOU employees documented widespread volunteerism across dozens of local and regional organizations, including the La Grande School District, Red Cross, Shelter from the Storm, Eastern Oregon Film Festival, Art Center East, Fishtrap, Scouting America, and numerous youth sports programs. Respondents reported volunteer commitments spanning nonprofits, school boards, civic groups, government agencies, and youth athletics, with many individuals contributing to multiple organizations simultaneously. The University itself maintains paid sponsorships and memberships with community organizations including the Union County Chamber of Commerce, Union County Fair Association, Eastern Oregon Livestock Show Association, La Grande Main Street, and multiple regional chambers of commerce, contributing a combined more than $11,500 in direct sponsorship during the most recent fiscal period. Together, these formal and informal contributions demonstrate EOU's pervasive integration into the civic fabric of Eastern Oregon.

4. The Economic Impact of Southern Oregon University

4.1. About Southern Oregon University

Southern Oregon University (SOU) is a regional public university located on a 175-acre campus in Ashland, Oregon, in the scenic Rogue Valley of Southern Oregon, and whose core academic programs align with the needs of the broader southern Oregon region. The institution traces its origins to the founding of the Ashland Academy in 1872, a private preparatory school established by the Methodist Episcopal Church. After several name changes, the state reestablished Southern Oregon State Normal School at its current location in 1926. The institution evolved from a teacher's college into a comprehensive regional university, adopting its current name in 1997.

Today, SOU's curriculum is anchored by undergraduate and graduate programs that range from fields such as business, psychology, and education to specialized disciplines in the visual and performing arts. The campus is home to 3,200 full time undergraduates and to growing populations of both graduate students and life-long learners. SOU maintains partnerships with several local and regional community colleges, area healthcare organizations, and regional businesses, ensuring opportunities for experiential learning and pathways from the classroom and laboratory to careers with area employers. SOU also has a significant economic impact; it is among the region's largest employers and contributes millions of dollars annually in direct and indirect spending to Ashland, the Rogue Valley, and the surrounding area.



4.2. Economic Impact from Southern Oregon University's Operations

Direct Operating Footprint

Southern Oregon University (SOU) creates a sizable impact for Jackson County, the SOU Region, and the State of Oregon, primarily through its annual operating expenditures, which support the institution's core missions of education, workforce development, student support, and community engagement. In FY2025, the university's operating expenditures totaled $115.4 million, reflecting spending across academic instruction, student services, institutional support, administration, and auxiliary functions.

Southern Oregon University's annual operations span its role as a regional public university serving students across Southern Oregon and the broader state, as well as portions of northern California. The university employs more than 675 full-time, part-time, adjunct, and student workers, including faculty, administrators, student support professionals, and operational staff, with the primary concentration of employment in Jackson County, and additional economic linkages extending throughout Oregon. Compensation and benefits for these employees totaled $66.6 million in FY2025, forming the largest share of the university's operating budget and generating far-reaching economic ripple effects across sectors such as housing, retail, healthcare, food services, and local business services.

In total, Southern Oregon University's annual operating expenditure reached $115.4 million in FY2025, reinforcing its role as a major economic engine for the regional economy and the State of Oregon. To accurately model economic impact, non-circulating expenditures such as depreciation and amortization, totaling $8.6 million, are excluded. Depreciation does not involve actual expenditures, and financing costs do not directly benefit the local or state economies. The resulting $106.8 million in modelable spending reflects the portion of the budget that flows into the local economy, supporting direct, indirect, and induced effects.

Figure 4.1: Summary of Southern Consolidated Annual Operating Expenditures, FY2025 ($M)

Category	Modeled	Total
Compensation and Benefits	Modeled	$66.6
Services and Supplies	Modeled	$31.9
Scholarships and Fellowships	Modeled	$8.3
Other Expenses[9]	Modeled	$0.0
Modelable Operating Expenses		$106.8
Depreciation and Amortization	Not Modeled	$8.6
Total Operating Expenses		$115.4

Source: Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

[9] SOU has "Other Expenses" that are negligible when rounded to $M.

The Economic Impact of Southern Oregon University Operations

Southern Oregon University's direct operational spending has a substantial influence on both the regional economy and the broader Oregon economy by stimulating business growth and supporting higher employment levels across a range of industries. The overall economic impact is a combination of direct spending by the university, the indirect effects generated by purchases from a wide range of suppliers, and the induced spending that occurs as university employees spend their wages within their communities. These indirect and induced effects expand as the geographic scope widens, driven by increased purchasing and recirculation within larger areas, which amplifies the multiplier effect.

The total annual economic impact within Jackson County is $139.4 million, comprised of (Figure 4.2):

- Direct impact of $75.6 million, which includes Southern Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures;
- Indirect and induced impacts of $63.8 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at Jackson County restaurants, retailers, and housing providers; and
- 1,110 direct, indirect, and induced jobs with $42.3 million in employee compensation.

The total annual economic impact within the SOU Region is $146.9 million, comprised of (Figure 4.2):

- Direct impact of $78.3 million, which includes Southern Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures;
- Indirect and induced impact of $68.6 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at SOU Region restaurants, retailers, and housing providers; and
- 1,170 direct, indirect, and induced jobs with $44.2 million in employee compensation.

The total annual economic impact within the State of Oregon is $166.1 million, comprised of (Figure 4.2):

- Direct impact of $87.4 million, which reflects university spending with vendors and service providers located throughout Oregon, as well as compensation paid to employees residing outside Jackson County but within the state;
- Indirect and induced impacts of $78.6 million, which reflect the broader statewide supply chain and household spending impacts generated as university-related dollars recirculate across Oregon industries and communities; and
- 1,280 direct, indirect, and induced jobs with $51.3 million in employee compensation.

Figure 4.2: Annual Economic Impact of Southern Oregon University's Operations

Impact Type	Jackson County	SOU Region	Oregon
Direct Impact ($M)	$75.6	$78.3	$87.4
Indirect & Induced Impact ($M)	$63.8	$68.6	$78.6
Total Economic Impact ($M)	**$139.4**	**$146.9**	**$166.1**
Annual Employment Supported (FTE)	**1,110**	**1,170**	**1,280**
Employee Compensation ($M)	**$42.3**	**$44.2**	**$51.3**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Tax Revenue Impact from Southern Oregon University's Annual Operations

Although Southern Oregon University operates as a public institution and is exempt from property taxes on university-owned, mission-related land and facilities, it nonetheless contributes significantly to fiscal revenues within the region and State of Oregon. While exemptions apply to university property and core educational functions, the university's operations generate substantial tax impacts through the broader economic activity it supports. At the local and state levels, this includes personal income taxes generated through employee earnings and other business-related taxes and fees supported through university-driven supply chain activity. In total, SOU's operations generate nearly $3.1 million in tax revenue each year for the State of Oregon.

Figure 4.3: Estimated Annual Fiscal Impact from Southern Oregon University's Operations within Oregon

Tax Type	Oregon
Income Tax	$2,495,800
Corporate Income Tax	$563,900
Tax Impact	**$3,059,700**

Source: Econsult Solutions, Inc. (2026), IMPLAN (2024)

4.3. Economic Impact from Southern Oregon University's Capital Investments

Southern Oregon University makes significant capital investments each year that strengthen its core educational mission while delivering measurable economic value to the regional economy and the State of Oregon. From FY2021 through FY2026, Southern Oregon University invested $58.2 million in new construction, deferred maintenance, facility modernization, and campus improvements across academic, student life, and operational infrastructure. These investments not only support university operations and the student experience but also provide a substantial boost to the local construction industry and generate fiscal benefits throughout the region.

More than physical upgrades, these projects reflect a broader commitment to local job creation, campus competitiveness, and long-term regional vitality. As Southern Oregon University continues to invest in classrooms, student housing, technology infrastructure, and campus support facilities, the economic

ripple effects extend across multiple sectors, including construction, professional services, manufacturing, building materials, transportation, and regional supply chains.

Direct Capital Investments

Southern Oregon University makes sustained capital investments each year to support continued institutional growth and deepen its economic and community impact. Between FY2021 and FY2026, SOU invested $58.2 million in capital spending across the university's footprint, with most of the investment focused in Jackson County, reaffirming the university's long-standing role as an anchor institution in the region (Figure 4.4).

These projects are not only foundational to Southern Oregon University's academic mission; they also generate significant regional economic activity, support job creation, and drive local business engagement. Looking ahead, these investments position the university to remain at the forefront of educational access, workforce preparation, and regional partnership while continuing to deliver long-term value to the communities it serves.

Southern Oregon University provided annual capital investments from FY2021 to FY2026. To estimate the net new impact from capital investments, ESI estimated the annual capitalized costs such as hard construction costs, design costs, and repair and maintenance costs that represent new, productive investments made each year. It is worth noting that the model does not consider non-capitalized costs and assets such as land acquisitions and furniture.

Figure 4.4: Estimated Annual Average Capital Expenditure, FY2021-FY2026 ($M)

	FY21	FY22	FY23	FY24	FY25	FY26	6-Year Total	6-Year Average
Southern Oregon University	$3.0	$3.0	$5.8	$5.8	$20.3	$20.3	$58.2	$9.7

Source: Southern Oregon University (2026), Econsult Solutions, Inc. (2026)

Economic Impact from Capital Investments

Southern Oregon University spends an average of approximately $9.7 million per year on capital investments. These capital investments play a critical role in driving economic activity at the local, regional, and state levels. Beyond direct spending on construction, deferred maintenance, and infrastructure modernization, these investments generate broader economic impacts through procurement from a diverse network of suppliers; and through employee spending in surrounding communities. As spending flows through the economy, it supports job creation and business growth across multiple sectors. The scale of these indirect and induced effects grows with geographic reach, as dollars circulate more broadly across jurisdictions, enhancing the overall multiplier effect and reinforcing the university's role as a sustained economic engine.

The annualized economic impact within Jackson County is $16.2 million, comprised of (Figure 4.5):

- Direct impact of $9.7 million, which includes Southern Oregon University's direct capital investments within Jackson County;
- Indirect and induced impacts of $6.5 million, which includes business-to-business expenditures within the supply chain, as well as employee spending at Jackson County restaurants, retailers, and housing providers; and
- 80 direct, indirect, and induced jobs with $4.8 million in employee compensation.

The annualized economic impact within the SOU Region is $16.7 million, comprised of (Figure 4.5):

- Direct impact of $9.7 million, which includes Southern Oregon University's direct capital investments within Jackson County;
- Indirect and induced impacts of $7.0 million, which includes business-to-business expenditures within the supply chain, as well as employee spending at Jackson County restaurants, retailers, and housing providers; and
- 80 direct, indirect, and induced jobs with $4.9 million in employee compensation.

The annualized economic impact within the State of Oregon is $17.1 million, comprised of (Figure 4.5):

- Direct impact of $9.7 million, which reflects direct impacts within the State, such as supplier purchases and project-related expenditures;
- Indirect and induced impacts of $7.4 million, which reflects the statewide supply chain extending to other communities and industries throughout Oregon; and
- 80 direct, indirect, and induced jobs with $5.0 million in employee compensation.

Figure 4.5: Estimated Annual Economic Impact of Southern Oregon University

Impact Type	Jackson County	SOU Region	Oregon
Direct Impact ($M)	$9.7	$9.7	$9.7
Indirect & Induced Impact ($M)	$6.5	$7.0	$7.4
Total Economic Impact ($M)	**$16.2**	**$16.7**	**$17.1**
Annual Employment Supported (FTE)	**80**	**80**	**80**
Employee Compensation ($M)	**$4.8**	**$4.9**	**$5.0**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Southern Oregon University's Capital Investments Generate Tax Revenue

Although Southern Oregon University operates as a public institution, its capital investments generate meaningful tax revenue for the State of Oregon. These investments drive construction activity and support local contractors, design professionals, material suppliers, and service providers, which in turn generate income tax and business-related tax revenues at the state level.

Importantly, the economic activity supported by this spending extends beyond the construction sector, creating ripple effects across a variety of industries and contributing to broader fiscal impacts. In total, Southern Oregon University's direct capital investments are estimated to generate approximately $272,400 in annual tax revenue for the State of Oregon (Figure 4.6).

Figure 4.6: Estimated Annual Fiscal Impact from Southern Oregon University

Tax Type	Oregon
Income Tax	$252,200
Corporate Income Tax	$20,200
Aggregate Tax Impact	**$272,400**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

4.4. Economic Impact from Southern Oregon University's Ancillary Spending

Southern Oregon University's presence generates substantial economic benefits that extend far beyond its direct operational and capital investments. When students, visitors, family members, prospective students, athletics attendees, and conference or event participants spend money off campus—at local restaurants, retail stores, hotels, or entertainment venues—they support a wide array of local businesses and sustain jobs across Jackson County, the SOU Region, and the State of Oregon. These ancillary expenditures also generate meaningful tax revenues for state jurisdictions.

While core spending such as tuition and university-owned housing is captured within Southern Oregon University's operational impact, the additional off-campus spending by students and visitors generates critical economic opportunities for surrounding communities. These impacts are especially pronounced in the hospitality, retail, lodging, and food service sectors, further reinforcing Southern Oregon University's role as a cornerstone of the region's economic vitality.

In aggregate, the economic impact of ancillary spending by students and visitors is $151.4 million within the State of Oregon, supporting 780 jobs with $28.2 million in employee compensation each year.

Southern Oregon University Direct Student Spending

Students' economic impact on Southern Oregon University's surrounding region extends beyond tuition payments to include substantial off-campus, or "ancillary," spending on necessities, services, and entertainment. This spending—distinct from the university's operational footprint—does not flow directly to Southern Oregon University and instead circulates within the local economy. It reflects either new economic activity from out-of-state and out-of-region students or retained local spending that might otherwise have left the region had local students chosen to attend college elsewhere.

According to institutional financial aid data and modeled student budgets for FY2025, estimated annual ancillary costs of attendance—not including tuition and other expenses paid directly to the university—totals an aggregate of $119.3 million, which reflects the approximate ancillary spending of all SOU students over one year.

Off-campus housing costs paid by non-commuting students are included as ancillary spending because they represent new injections into the Jackson County rental market, while housing costs for commuter students are excluded, as they would likely be incurred regardless of enrollment at Southern Oregon University. However, food, transportation, retail, and entertainment purchases made by commuter students while attending the university are included in the analysis as true local economic impacts (Figure 4.7).

Figure 4.7: Estimated Annual Aggregate Ancillary Student Spending by Student Type

Student Type	# of Students	Per Student Ancillary Spending	Aggregate Ancillary Spending ($M)
Undergraduate			
On-Campus	855	$22,302	$7.9
Off-Campus	1,855	$22,302	$41.4
Commuters	539	$14,349	$7.7
Graduate			
On-Campus	44	$22,302	$0.4
Off-Campus	556	$22,302	$12.4
Commuters	162	$14,349	$3.6
Non-Degree Seeking			
Commuters	3,201	$14,349	$45.9
Total Aggregate Student Spending	**7,212**		**$119.3**

Source: Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

The analysis accounts for the geographic distribution of student spending, recognizing that not all expenditures remain within the immediate area, particularly given online shopping patterns and student purchases made outside Jackson County. A portion of this spending exits the region immediately, thus lacking a multiplier effect within the local economy.

To address this, ESI's modeling approach conservatively incorporates only the retail margin (i.e., the difference between the purchase price for the retailer and the sales price paid by the customer). Of the estimated $119.3 million in annual student ancillary spending, approximately $79.1 million circulates within Jackson County's economy, and $119.3 million is retained within the SOU Region, and $110.7 million within the State of Oregon[10] (Figure 4.8). These figures reflect careful consideration of student spending patterns across different geographic boundaries and provide a conservative estimate of the share of spending that truly generates local, regional, and statewide economic effects.

[10] The total ancillary spending in Oregon excludes the counties in California which are included in the SOU Region.

Figure 4.8: Estimated Annual Aggregate Ancillary Student Spending Capture within Jackson County and Oregon

Student Type	Jackson County	SOU Region	Oregon
On-Campus	$7.4	$8.3	$8.0
Off-Campus	$43.0	$53.8	$51.1
Commuters	$28.6	$57.3	$51.6
Total	**$79.1**	**$119.3**	**$110.7**

Source: Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

Southern Oregon University Direct Visitor Spending

Southern Oregon University serves as an important year-round visitor destination, drawing a wide array of guests to its campus from across Oregon and beyond. These visitors make meaningful contributions to the regional economy through spending that supports local jobs and generates tax revenue.

The university's visitor base includes alumni, parents, prospective students, and attendees at university events and other visitors who are drawn to the region for its high-profile arts and theater offerings. For example, the world-renowned Oregon Shakespeare Festival (OSF) is the largest such production company outside the United Kingdom.[11] To accurately quantify the economic impact of these visits, detailed spending profiles were developed based on visit purpose, trip length, travel distance, event type, and visitor demographics, acknowledging that different categories of visitors have distinct spending behaviors.

The Oregon Shakespeare Festival was founded in 1935, and has since shared Shakespeare's works with approximately 400,000 visitors each year at their full-scale Elizabethan stage in Ashland, Oregon. The festival's economic impact was estimated to be greater than $120 million prior to the pandemic.

Aggregate annual Southern Oregon University visitor spending estimates were developed using attendance and participation data provided by the university. These data were combined with per-visitor spending profiles segmented by industry, such as lodging, food services, retail, and transportation.

As with student spending, conservative geographic assumptions were applied to estimate the share of spending captured within Jackson County, while excluding expenditures already reflected in Southern Oregon University's operational budget. Attendees traveling from less than 50 miles away are classified as local; those arriving from 50–100 miles away are categorized as day trip visitors; and those traveling more than 100 miles are considered overnight guests. Figure 4.9 displays visitation figures by event type and estimated visitor geography of origin.

[11] Oregon Shakespeare Festival, "OSF Timeline" (June 2026), https://www.osfashland.org/en/company/our-history/osf-timeline.aspx

Figure 4.9: Estimated Aggregate Annual Spending by Southern Oregon University Visitors, by Estimated Visitor Geography of Origin

Event	Local	Daytrip	Overnight	Total Visitors
Commencement	881	411	1,644	2,935
Athletics	5,145	3,001	429	8,575
Admissions	838	762	6,019	7,619
Move-In	540	252	1,008	1,800
Youth Programs	2,179	778	156	3,113
Total Visitors	**9,583**	**5,204**	**9,256**	**24,042**

Source: Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

Economic Impact from Ancillary Spending by Students and Visitors

Ancillary spending by students, visitors, and event attendees has a multiplier effect throughout the region, generating the following annual economic impacts (Figure 4.10):

- $108.5 million in total output within Jackson County, supporting 560 jobs with $20.2 million in earnings;
- $157.9 million in total output within the SOU Region, supporting 820 jobs with $28.7 million in earnings; and
- $151.4 million in total output within the State of Oregon, supporting 780 jobs with $28.2 million in earnings.

Figure 4.10: Estimated Annual Economic Impact from Ancillary Spending by Students and Visitors

Impact Type	Jackson County	SOU Region	Oregon
Direct Impact ($M)	$73.0	$108.5	$100.9
Indirect & Induced Impact ($M)	$35.4	$49.4	$50.5
Total Economic Impact ($M)	**$108.5**	**$157.9**	**$151.4**
Annual Employment Supported (FTE)	**560**	**820**	**780**
Employee Compensation ($M)	**$20.2**	**$28.7**	**$28.2**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Southern Oregon University Ancillary Spending Generates Tax Revenue

In aggregate, ancillary spending by SOU students and their visitors, athletics attendees, prospective students, conference participants, and other university event guests generates more than $1.9 million in annual tax revenues to the State of Oregon (Figure 4.11).

Figure 4.11: Estimated Aggregate Annual Tax Revenue Impact from Ancillary Spending by SOU Students and Visitors

Tax Type	Oregon
Income Tax	$1,426,100
Corporate Income Tax	$485,800
Lodging Tax	$15,500
Aggregate Tax Impact	**$1,927,400**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

In addition to state taxes, SOU also generates local taxes through transient lodging taxes (TLTs) and the business license and food and beverage tax (BLFB). Both the TLT and BLFB are levied at the city level for Ashland, as well as the statewide TLT in Oregon. In total, spending activity associated with SOU generates approximately $1.4 million in TLTs and BLFB taxes (Figure 4.12).

Figure 4.12: Estimated TLT and BLFB Tax Revenue Impact from Ancillary Spending by SOU Students and Visitors

Tax Type	Tax Revenue Generated
Ashland BLFB (5%)	$1,297,810
Ashland TLT (10%)	$88,230
Oregon TLT (1.5%)	$15,190
Total Tax Impact	**$1,401,230**

Source: Econsult Solutions, Inc. (2026); City of Ashland (2026); Oregon Dept. of Revenue (2026)

4.5. The Economic Impact from Southern Oregon University's Alumni Wage Premium

Southern Oregon University's economic impact extends well beyond its direct operations, capital investments, and ancillary spending by students and visitors. Among its most far-reaching contributions is the economic value generated through its core educational mission. A Southern Oregon University degree translates into enhanced earning potential for its graduates, particularly in fields that are critical to the economies of Jackson County, the SOU Region, and the State of Oregon. This wage premium—the additional income earned by Southern Oregon University alumni relative to individuals without the same level of educational attainment—generates lasting economic value that reverberates across the regions where alumni live and work.

By equipping graduates with in-demand credentials, applied knowledge, and workforce-relevant skills, Southern Oregon University fosters a more competitive and resilient regional workforce. Alumni contribute to local economies not only through their elevated earnings and household spending, but also as educators, healthcare professionals, business leaders, public servants, and community anchors. This sustained wage premium bolsters long-term regional prosperity and reinforces Southern Oregon University's role as a driver of upward mobility, talent retention, and economic growth.

As of FY2025, Southern Oregon University's alumni network includes nearly 41,000 graduates, with 29 percent residing in Jackson County, 37 percent residing in the SOU Region (including Jackson County) and 64 percent in Oregon (including the Oregon portion of the SOU Region). The value of a Southern Oregon University degree corresponds to an annual wage premium of over $165 million in Jackson County, $207 million in the SOU Region, and $395 million within Oregon. This additional household income generates further spending within the area, stimulating spillover economic impact.

Within Jackson County, the wage premium leads to $176 million in economic impact, supporting 900 jobs with $51.7 million in employee compensation. Furthermore, the SOU wage premium leads to $211 million in economic impact, supporting 1,090 full-time jobs with $61.3 million in employee compensation in the SOU Region; while the alumni wage premium in the State leads to $395.4 million in economic impact, supporting 1,920 full-time jobs with $117.9 million in employee compensation within Oregon.

The wage premium and subsequent increased alumni spending within Oregon increases the tax base, thereby generating over $53.8 million in taxes for Oregon.

Defining Alumni Wage Premium

In today's knowledge-driven economy, the education and intellectual capital of workers are among the most valuable assets influencing organizational productivity and regional competitiveness. Individuals who graduate from Southern Oregon University, equipped with specialized expertise, advanced credentials, and workforce-relevant skills, are rewarded with higher wages in the labor market. These elevated earnings reflect both the practical value of a Southern Oregon University education and the institution's strong alignment with the needs of employers across Jackson County, the SOU Region, and the State of Oregon.

While the wage premium calculations provide valuable insight into earnings associated with degree attainment, they do not capture the full economic benefit of Southern Oregon University's educational pathways. Clinical placements, educator preparation experiences, internships, applied learning opportunities, and other workforce-aligned experiential programs significantly enhance participants' long-term earning potential through skill development, professional networks, and direct pathways into Oregon's labor market. These valuable career advancement mechanisms, though not fully quantified in the current wage data, represent additional economic impact pathways through which the university contributes to individual earning capacity and regional economic strength.

Wage premium analysis quantifies the broader economic benefit generated by degree-earning Southern Oregon University alumni. The analysis estimates the additional income earned by graduates within Jackson County, the SOU Region, and the State of Oregon, translating that income into increased household spending. This increased spending supports regional jobs, stimulates business activity, and generates state tax revenue. In aggregate, this enhanced earning power results in millions of additional dollars circulating through Oregon's economy each year, underscoring the enduring impact of Southern Oregon University on regional prosperity, workforce resilience, and upward mobility.

Direct Alumni Wage Premium

Data provided by Southern Oregon University indicate that over 26,165 living alumni reside in Oregon, of which 11,570 alumni live in Jackson County, and an additional 2,900 alumni live elsewhere in the SOU Region.

Of the university's total living alumni base, 64 percent reside in Oregon, reflecting Southern Oregon University's strong role in retaining graduates within the state and supporting local and regional workforce needs. A meaningful share of these alumni remain in Southern Oregon and surrounding rural communities, reinforcing the university's contribution to talent retention and long-term regional resilience.

Of those living alumni, it is estimated that 70.6 percent are currently employed (as opposed to retired, unemployed, or otherwise out of the workforce). For the purposes of this study, the analysis focuses primarily on working Southern Oregon University alumni who live within Jackson County, the SOU Region, and the State of Oregon. Applying the 70.6 percent working alumni proportion evenly across geographies and degree attainment, it is estimated that approximately 8,170 alumni live and work in Jackson County; 10,220 live within the SOU Region; and 18,470 within the State of Oregon (Figure 4.13).

Figure 4.13: Distribution of Southern Oregon University Alumni in the Workforce

Degree Type	Residing in Jackson County	Residing in SOU Region (minus Jackson County)	Residing in the Rest of Oregon (minus OR portion of SOU Region)	Total
Bachelor's	8,985	2,278	9,811	21,075
Advanced	2,584	626	1,881	5,091
Total Alumni	11,569	2,904	11,692	26,165
Labor Force Participation Rate	70.6%	70.6%	70.6%	70.6%
Estimated Total Working Alumni	**8,168**	**2,050**	**8,255**	**18,473**

Sources: Bureau of Labor Statistics (2026); Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

An aggregate increase in earning potential across each geography can be estimated by analyzing both the overall rise in educational attainment within the workforce and the wage premium specifically associated with a Southern Oregon University degree. Drawing on federal data and institutional analysis, the average annual wage premium attributable to increased educational attainment for Southern Oregon University alumni is estimated to be approximately $20,300 for bachelor's degree holders and $20,200 for advanced degree holders within Oregon.

The individual wage premium was calculated as the difference between median earnings for Southern Oregon University alumni at various degree attainment levels and the median earnings for all Oregon residents at one degree attainment level below.

[12] U.S. Bureau of Labor Statistics, "Employment Status of the Civilian Population 25 Years and Over by Educational Attainment" (March 2026), https://www.bls.gov/news.release/empsit.t04.htm

For example, the wage premium for a Southern Oregon University alumnus with a bachelor's degree living in Oregon equals the median earnings of Southern Oregon University alumni with bachelor's degrees minus the median earnings for all Oregon residents with an associate degree or professional certificate (Figure 4.14).

Figure 4.14: Estimated Wage Premium for Alumni Residing in Oregon

Degree Type	Southern Oregon University Employed	SOU Wage Premium per Alumnus(a)	Total Modeled AWP ($M)
Bachelor's Degree	14,879	$20,300	$302.4
Advanced Degree	3,594	$20,200	$72.6

Sources: American Community Survey (2024); College Scorecard (2026); Econsult Solutions, Inc. (2026)

The wage premium is then applied to the estimated number of Southern Oregon University alumni working within Jackson County, the SOU Region, and across the rest of Oregon, segmented by degree level. The resulting aggregate wage premium reflects the additional household income earned by alumni as a direct outcome of the education, credentials, and workforce preparation they received at Southern Oregon University.

In total, this annual wage premium is estimated to generate approximately $165.8 million in additional earnings within Jackson County; $207.4 million in the SOU Region; and $362.6 million across the rest of Oregon, representing a significant and sustained contribution to regional economic growth, talent retention, and household spending capacity (Figure 4.14).

Economic Impact from Alumni Wage Premium

The additional earning potential associated with a Southern Oregon University degree has both direct and consequential impacts on the university's alumni. Beyond the benefits to individual graduates, the wage premium generated by Southern Oregon University alumni produces a spillover impact on regional economies because alumni have greater disposable income to spend within Jackson County, the SOU Region, and the State of Oregon.

The effects of this additional household spending are estimated to generate on an annual basis (Figure 4.15):

- $176.0 million in economic impact within Jackson County, supporting 900 direct, indirect, and induced jobs with $51.7 million in employee compensation;
- $211.0 million in economic impact within the SOU Region, supporting 1,090 direct, indirect, and induced jobs with $61.3 million in employee compensation; and
- $395.4 million in economic impact within the State of Oregon[13], supporting 1,920 direct, indirect, and induced jobs with $117.9 million in employee compensation.

[13] The State of Oregon is only inclusive of the portion of the SOU Region that is in Oregon, it excludes the California counties that are within the SOU Region.

Figure 4.15: Annual Economic Impact Attributable to Southern Oregon University Wage Premium Effects within Jackson County, the SOU Region, and Oregon

Impact Type	Jackson County	SOU Region	Oregon
Direct Wage Premium ($M)	$165.8	$207.4	$362.6
Total Impact ($M)	**$176.0**	**$211.0**	**$395.4**
Employment Supported (FTE)	**900**	**1,090**	**1,920**
Employee Compensation ($M)	**$51.7**	**$61.3**	**$117.9**

Sources: Southern Oregon University (2026); Econsult Solutions, Inc. (2026); IMPLAN (2024)

Alumni Wage Premium Generates Tax Revenue

Increased household income also translates into increased tax revenue for the State of Oregon, where many Southern Oregon University alumni reside and work. Oregon realizes additional tax revenue from the Southern Oregon University alumni wage premium through higher personal income tax collections and business-related tax revenues supported by increased household spending.

Furthermore, the wage premium indirectly generates additional revenue through the broader economic activity created as alumni spend their higher earnings across Oregon's economy. In total, $28.4 million in tax revenue is generated statewide from Southern Oregon University's alumni wage premium (Figure 4.16).

Figure 4.16: Fiscal Impacts of the Wage Premium Associated with Southern Oregon University in Oregon ($M)

Tax Type	Oregon
Personal Income Tax (paid on Alumni Wage Premium) ($M)	$21.4
Personal Income Tax (from SOU Alumni Spending) ($M)	$5.9
Total Personal Income Tax ($M)	$27.2
Corporate Income Tax ($M)	$1.2
Aggregate Income Tax Impact ($M)	**$28.4**

Sources: Southern Oregon University (2026); Econsult Solutions, Inc. (2026); Oregon ACFR (2024)

4.6. Southern Oregon University's Social and Community Impact

SOU functions as a significant cultural and intellectual anchor for the region. The Oregon Center for the Arts (OCA) at SOU serves as both an academic division and a regional arts presenter, offering programs in music, theatre, and creative arts while partnering with major community organizations including the Oregon Shakespeare Festival, Britt Music & Arts Festival, Ashland New Plays Festival, Rogue Valley Symphony, and the Ashland Independent Film Festival. The Schneider Museum of Art, which has provided free public admission since opening in 1986, offers 4,000 square feet of gallery space featuring rotating exhibitions by nationally and internationally recognized artists, and serves as a critical cultural resource for a vast rural region between the museum communities of Eugene and Sacramento. The Hannon Library, recipient of the 2004 Federal Depository Library of the Year Award, engages the public

through exhibits, the annual Ashland Book and Author Festival, and the Southern Oregon Arts and Research (SOAR) conference, while its Southern Oregon Digital Archives have earned national recognition. SOU also serves as the headquarters of Jefferson Public Radio, which broadcasts across Southern Oregon and Northern California. Additional community-facing programming includes the Osher Lifelong Learning Institute (OLLI), the Ashland Chamber Summer Music Workshop, the Honors High School Band and Chorus, and Pre-College and Youth Programs.

SOU's educator preparation programs represent one of its most direct contributions to regional workforce capacity. In the 2025–26 academic year, SOU placed 59 student teachers and licensed educators pursuing additional endorsements in K–12 schools across Oregon and Northern California, along with an additional 20 principal and administrative candidates. All of SOU's licensure programs are designed for remote and rural access, and 18 of the 59 student teachers—approximately 31 percent—live outside the immediate Rogue Valley and completed their placements in their home communities, directly addressing teacher shortages in rural districts. Through partnerships with the Southern Oregon Education Service District, Oregon Tech, Portland State University, and dozens of school districts, SOU provides pathways including the Master of Arts in Teaching (MAT), special education licensure, educational studies, principal preparation, added endorsements, and a dyslexia training program. SOU has also partnered with five community colleges—Rogue, Umpqua, Klamath, Southwestern, and Central Oregon—to offer BA/BS Early Childhood Development degree completion pathways funded through Oregon's Department of Early Learning and Care (DELC) grants, extending educational access across a broad swath of Southern and Central Oregon.



Beyond its educational programs, SOU functions as a host and partner for a range of regional research, extension, and public service infrastructure. The University hosts Oregon State University's SMILE (Science and Math Investigative Learning Experience) program for Southern Oregon, provides offices and administrative support for the OSU-administered Oregon Outdoor School program, and co-authors and co-hosts regional agricultural extension materials through The Farm at SOU, which houses clonal replicates for regional research. SOU operates the Southern Oregon University Laboratory for Anthropology (SOULA) as a satellite curation facility for the University of Oregon's Natural History Museum and hosts the regional seismic monitoring station for UO's Oregon Hazards Lab, a state-funded early earthquake warning system. The University's Institute for Applied Sustainability is an affiliated member of Portland State University's Institute for Sustainable Solutions, and SOU participates in the Orbis Cascade Alliance, a shared library services consortium spanning 38 institutions across the Pacific Northwest. Figure 4.17 summarizes these and other key institutional partnerships.



Figure 4.17: Key Institutional Partnerships

Partner	Program/Pathway	Nature of Partnership
Rogue, Umpqua, Klamath, Southwestern, Central Oregon CCs	BA/BS Early Childhood Development	DELC Grant-funded degree completion pathways
Oregon State University	SMILE Program; Outdoor School; The Farm at SOU	Hosted STEM education, outdoor education administration, and agricultural extension
University of Oregon	SOULA; Oregon Hazards Lab	Satellite anthropology curation facility and regional seismic monitoring station
Portland State University	Institute for Applied Sustainability	Affiliated member of PSU's Institute for Sustainable Solutions
Oregon Tech	MAT	Seamless admission for OIT math/science graduates into teacher preparation
Southern Oregon ESD	Apprenticeship, MAT, Ed. Studies	Professional development and student support for special education and math teaching
Risepoint (online partner)	MBA; MSEd (online)	155 online MBA students (Winter 2026)
Orbis Cascade Alliance	Library services	Shared collections and services among 38 Northwest academic libraries
School districts (OR & N. CA)	MAT, SPED, PAL, Endorsements	Student teaching and principal preparation placements across dozens of districts

Source: Southern Oregon University (2026); Econsult Solutions, Inc. (2026)

SOU invests significantly in making higher education financially accessible for students across Oregon and the broader region. In the 2024-25 award year, SOU disbursed $8.2 million in institutional aid. Rural students, classified using USDA RUCA designations, received approximately $384,000 in institutional aid, representing 4.7 percent of total disbursements. SOU's emphasis on engaged, place-based education—reflected in its community partnerships, the Medford Higher Education Center operations (shared between SOU and Rogue Community College), and experiential learning philosophy—positions the institution as a critical provider of human capital and cultural vitality for a region that is geographically distant from Oregon's major metropolitan centers.

5. The Economic Impact of Western Oregon University

5.1. About Western Oregon University

Western Oregon University (WOU) is the oldest public university in Oregon, founded in 1856 as Monmouth University by Disciples of Christ pioneers who crossed the Oregon Trail to establish both a church community and an institution of higher education in the Willamette Valley. The institution evolved through seven name changes before adopting its current name in 1997 to reflect its broadened mission as a comprehensive public university. Located on a 157-acre campus in Monmouth, approximately 20 minutes from Salem and 75 minutes from Portland, WOU is organized into two colleges—the College of Education and the College of Liberal Arts and Sciences—and offers 60 undergraduate majors along with master's degree programs in education, rehabilitation counseling, criminal justice, music, and management and information systems. In addition, WOU offers a Doctorate of Occupational Therapy, the only public Occupational Therapy program in Oregon.

WOU serves a total enrollment of approximately 3,600 students and is distinguished by its commitment to diversity and access. The University is the first public four-year institution in Oregon to earn designation as a Hispanic Serving Institution (HSI), with Hispanic and Latino students comprising 27.5 percent of the student body; and students of color representing 41 percent of enrollment overall. Half of all WOU students are the first in their families to attend college, and 84 percent of undergraduates come from Oregon. 74 percent of all students receive financial aid, a figure that rises to 90 percent among first-time, full-time students. WOU's emphasis on personalized education is reflected in a 14-to-1 student-to-faculty ratio and an average class size of 19, ensuring that students receive individualized attention and mentorship throughout their academic careers.

WOU's academic strengths are rooted in its historic mission as a teacher-training institution, and education remains its most popular major, followed by psychology, business, criminal justice, and exercise science. The University's teacher preparation programs continue to serve as a significant pipeline for K–12 educators across Oregon, while its graduate programs in rehabilitation counseling and criminal justice address critical workforce needs in human services and public safety. WOU competes in NCAA Division II athletics as a member of the Great Northwest Athletic Conference, fielding 12 varsity sports that contribute to campus vibrancy and regional engagement. The University also supports a range of student services designed to close equity gaps, including Multicultural Student Services and Programs, the Student Enrichment Program for first-generation and low-income students, and comprehensive disability services. Situated within the mid-Willamette Valley, with proximity to the state capital, the Portland metropolitan area, the Pacific Coast, and the Cascade Range, WOU is well positioned to serve as a bridge between rural and urban Oregon, providing an accessible, high-quality education that strengthens communities and prepares graduates for meaningful careers across the state.



5.2. Economic Impact from Western Oregon University's Operations

Direct Operating Footprint

Western Oregon University creates a sizable economic impact for Polk County, the WOU Region, and the State of Oregon, primarily through its annual operating expenditures, which support the institution's core missions of education, workforce development, student support, and community engagement. In FY2025, the university's operating expenditures totaled $121.7 million, reflecting spending across academic instruction, student services, institutional support, administration, and auxiliary functions.

Western Oregon University's annual operations span its role as a regional public university serving students across Western Oregon and the broader state. The university employs more than 875 full-time, part-time, adjunct, and student workers, including faculty, administrators, student support professionals, and operational staff, with the primary concentration of employment in Mid-Willamette Valley and additional economic linkages extending throughout Oregon. Compensation for these employees totaled $81 million in FY2025, forming the largest share of the university's operating budget and generating far-reaching economic ripple effects across sectors such as housing, retail, healthcare, food services, and local business services.

In total, Western Oregon University's annual operating expenditure reached $121.7 million in FY2025, reinforcing its role as a major economic engine for the regional economy and the State of Oregon. To accurately model economic impact, non-circulating expenditures such as depreciation and amortization, totaling $7.8 million, are excluded. Depreciation does not involve actual expenditures, and financing costs do not directly benefit the local or state economies. The resulting $113.9 million in modelable spending reflects the portion of the budget that flows into the local economy, supporting direct, indirect, and induced effects.

Figure 5.1: Summary of Western Consolidated Annual Operating Expenditures, FY2025 ($M)

Category	Modeled	Total
Compensation and Benefits	Modeled	$81.0
Services and Supplies	Modeled	$20.9
Scholarships and Fellowships	Modeled	$11.7
Other	Modeled	$0.4
Modelable Operating Expenses		$113.9
Depreciation and Amortization	Not Modeled	$7.8
Total Operating Expenses		$121.7

Source: Western Oregon University (2026), Econsult Solutions, Inc. (2026)

The Economic Impact of Western Oregon University Operations

Western Oregon University's direct operational spending has a substantial influence on both the regional economy and the broader Oregon economy by stimulating business growth and supporting higher employment levels across a range of industries. The overall economic impact is a combination of direct spending by the university, the indirect effects generated by purchases from a wide range of suppliers, and the induced spending that occurs as university employees spend their wages within their communities. These indirect and induced effects expand as the geographic scope widens, driven by increased purchasing and recirculation within larger areas, which amplifies the multiplier effect.

The total annual economic impact within Polk County is $63.6 million, comprised of (Figure 5.2):

- Direct impact of $40.1 million, which includes Western Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures;
- Indirect and induced impacts of $23.4 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at Polk County restaurants, retailers, and housing providers; and
- 660 direct, indirect, and induced jobs with $13.2 million in employee compensation.

The total annual economic impact within the WOU Region is $119.1 million, comprised of (Figure 5.2):

- Direct impact of $70.6 million, which includes Western Oregon University's spending on salaries, instructional services, student support, campus operations, and other university-related expenditures; and
- Indirect and induced impact of $48.5 million, which includes business-to-business expenditures within the supply chain, such as purchases from local service providers and vendors (indirect), as well as employee household spending at WOU Region restaurants, retailers, and housing providers.
- 1,060 direct, indirect, and induced jobs with $34 million in employee compensation.

The total annual economic impact within the State of Oregon is $171.3 million, comprised of (Figure 5.2):

- Direct impact of $92.7 million, which reflects university spending with vendors and service providers located throughout Oregon, as well as compensation paid to employees residing outside the WOU region but within the state;
- Indirect and induced impact of $78.7 million, which reflects the broader statewide supply chain and household spending impacts generated as university-related dollars recirculate across Oregon industries and communities; and
- 1,370 direct, indirect, and induced jobs with $52.8 million in employee compensation.

Figure 5.2: Annual Economic Impact of Western Oregon University's Operations

Impact Type	Polk County	WOU Region	Oregon
Direct Impact ($M)	$40.1	$70.6	$92.7
Indirect & Induced Impact ($M)	$23.4	$48.5	$78.7
Total Economic Impact ($M)	**$63.6**	**$119.1**	**$171.3**
Annual Employment Supported (FTE)	**660**	**1,060**	**1,370**
Employee Compensation ($M)	**$13.2**	**$34.0**	**$52.8**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

Tax Revenue Impact from Western Oregon University's Annual Operations

Although Western Oregon University operates as a public institution and is exempt from property taxes on university-owned, mission-related land and facilities, it nonetheless contributes significantly to fiscal revenues within the State of Oregon. While exemptions apply to university property and core educational functions, the university's operations generate substantial tax impacts through the broader economic activity it supports. At the local and state levels, this includes personal income taxes generated through employee earnings, and other business-related taxes and fees supported through university-driven supply chain activity. WOU generates more than $2.9 million in statewide tax revenue each year, nearly $2.6 million from income tax; and nearly $0.4 million from business taxes (Figure 5.3).

Figure 5.3: Estimated Annual Fiscal Impact from Western Oregon University's Operations within Oregon

Tax Type	Oregon
Income Tax	$2,563,500
Corporate Income Tax	$377,900
Tax Impact	**$2,941,400**

Source: Econsult Solutions, Inc. (2026), IMPLAN (2024)

5.3. Economic Impact from Western Oregon University's Capital Investments

Western Oregon University makes significant capital investments each year that strengthen its core educational mission while delivering measurable economic value to the regional economy and the State of Oregon. From FY2021 until FY2026, Western Oregon University invested $58.8 million in new construction, deferred maintenance, facility modernization, and campus improvements across academic, student life, and operational infrastructure. These investments not only support university operations and the student experience but also provide a substantial boost to the local construction industry, and generate fiscal benefits throughout the region.

More than physical upgrades, these projects reflect a broader commitment to local job creation, campus competitiveness, and long-term regional vitality. As Western Oregon University continues to invest in classrooms, student housing, technology infrastructure, and campus support facilities, the economic ripple effects extend across multiple sectors, including construction, professional services, manufacturing, building materials, transportation, and regional supply chains.

Direct Capital Investments

Western Oregon University makes sustained capital investments each year to support continued institutional growth and deepen its economic and community impact. Most of the investment is focused in Mid-Willamette Valley, reaffirming the university's long-standing role as an anchor institution in the region.

These projects are not only foundational to Western Oregon University's academic mission; they also generate significant regional economic activity, support job creation, and drive local business engagement. Looking ahead, these investments position the university to remain at the forefront of educational access, workforce preparation, and regional partnership while continuing to deliver long-term value to the communities it serves.

Western Oregon University provided annual capital investments planned by the institution from FY2021 to FY2026 (Figure 5.4). To estimate the net new impact from capital investments, ESI estimated the annual capitalized costs such as hard construction costs, design costs, and repair and maintenance costs that represent new, productive investments made each year. It is worth noting that the model does not consider non-capitalized costs and assets such as land acquisitions and furniture.

Figure 5.4: Estimated Annual Average Capital Expenditure, FY2021-FY2026 ($M)

	FY21	FY22	FY23	FY24	FY25	FY26	6-Year Total	6-Year Average
Western Oregon University	$15.3	$15.3	$2.7	$2.7	$11.3	$11.3	$58.8	$9.8

Source: Econsult Solutions, Inc. (2026); Western Oregon University (2026)

Economic Impact from Capital Investments

Western Oregon University spends an average of $9.8 million per year on capital investments. These capital investments play a critical role in driving economic activity at both the local, regional, and state levels. Beyond the direct spending on construction, deferred maintenance, and infrastructure modernization, these investments generate broader economic impacts through procurement from a diverse network of suppliers and through employee spending in surrounding communities. As spending flows through the economy, it supports job creation and business growth across multiple sectors. The scale of these indirect and induced effects grows with geographic reach, as dollars circulate more broadly across jurisdictions, enhancing the overall multiplier effect and reinforcing the university's role as a sustained economic engine.

The annualized economic impact within Polk County is $12.7 million, comprised of (Figure 5.5):

- Direct impact of $9.8 million, which includes Western Oregon University's direct capital investments within Polk County;
- Indirect and induced impacts of $2.9 million, which includes business-to-business expenditures within the supply chain, as well as employee spending at Polk County restaurants, retailers, and housing providers; and
- 70 direct, indirect, and induced jobs with $3.5 million in employee compensation.

The annualized economic impact within the WOU Region is $14.1 million, comprised of (Figure 5.5):

- Direct impact of $9.8 million;
- Indirect and induced impacts of $4.3 million, which reflects the larger geography extending to other communities and industries throughout the WOU Region; and
- 70 direct, indirect, and induced jobs with $3.8 million in employee compensation.

The annualized economic impact within the State of Oregon is $16.1 million, comprised of (Figure 5.5):

- Direct impact of $9.8 million;
- Indirect and induced impacts of $6.3 million, which reflects the statewide supply chain extending to other communities and industries throughout Oregon; and
- 80 direct, indirect, and induced jobs with $4.4 million in employee compensation.

Figure 5.5: Estimated Annual Economic Impact of Western Oregon University due to Capital Investments

Impact Type	Polk County	WOU Region	Oregon
Direct Impact ($M)	$9.8	$9.8	$9.8
Indirect & Induced Impact ($M)	$2.9	$4.3	$6.3
Total Economic Impact ($M)	**$12.7**	**$14.1**	**$16.1**
Annual Employment Supported (FTE)	**70**	**70**	**80**
Employee Compensation ($M)	**$3.5**	**$3.8**	**$4.4**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)



Western Oregon University's Capital Investments Generate Tax Revenue

Although Western Oregon University operates as a public institution, capital investments generate meaningful tax revenue for the State of Oregon. These investments drive construction activity and support local contractors, design professionals, material suppliers, and service providers, which in turn generate income tax and business-related tax revenues at the state level.

Importantly, the economic activity supported by this spending extends beyond the construction sector, generating ripple effects across a variety of industries and contributing to broader fiscal impacts. In total, Western Oregon University's direct capital investments are estimated to generate approximately $238,300 in annual tax revenue for the State of Oregon (Figure 5.6).

Figure 5.6: Estimated Annual Fiscal Impact from Western Oregon University Capital Investments

Tax Type	Total
Income Tax	$221,800
Corporate Income Tax	$16,500
Aggregate Tax Impact	**$238,300**

Source: Econsult Solutions, Inc. (2026), IMPLAN (2024)

5.4. Economic Impact from Western Oregon University's Ancillary Spending

Western Oregon University's presence generates substantial economic benefits that extend far beyond its direct operational and capital investments. When students, visitors, prospective students, and event participants spend money off campus—at local restaurants, retail stores, hotels, or entertainment venues—they support a wide array of local businesses and sustain jobs across Polk County, the WOU Region, and the State of Oregon. These ancillary expenditures also generate meaningful tax revenues for both local and state jurisdictions.

While core spending such as tuition and university-owned housing is captured within Western Oregon University's operational impact, the additional off-campus spending by students and visitors creates critical economic opportunities for surrounding communities. These impacts are especially pronounced in the hospitality, retail, lodging, and food service sectors, further reinforcing Western Oregon University's role as a cornerstone of the region's economic vitality.

Based on conservative estimates combining Western Oregon University's direct data and research-based assumptions, this ancillary spending generates a considerable economic impact within the County, Region, and the State of Oregon.

In aggregate, the economic impact of ancillary spending by students, visitors, and university events is $88.8 million in the State of Oregon, supporting 540 jobs with $18.1 million in employee compensation each year.

Western Oregon University Direct Student Spending

Students' economic impact on Western Oregon University's surrounding region extends beyond tuition payments to include substantial off-campus, or "ancillary," spending on necessities, services, and entertainment. This spending—distinct from the university's operational footprint—does not flow directly to Western Oregon University and instead circulates within the local economy. It reflects either new economic activity from out-of-state and out-of-region students or retained local spending that might otherwise have left the region had local students chosen to attend college elsewhere.

According to institutional financial aid data and modeled student budgets for FY2025, estimated annual costs of attendance—not including tuition and other expenses paid directly to the university—total an aggregate $16.2 million for on-campus students, $30.7 million for off-campus students, and $3.6 million for commuting students (those living with family). This analysis carefully distinguishes between institutional revenue and off-campus expenditures.

For example, off-campus housing costs paid by non-commuting students are included as ancillary spending because they represent new injections into the region's rental market, while housing costs for commuter students are excluded, as they would likely be incurred regardless of enrollment at Western Oregon University. However, food, transportation, retail, and entertainment purchases made by commuter students while attending the university are included in the analysis as true local economic impacts (Figure 5.7).

Figure 5.7: Estimated Annual Aggregate Ancillary Student Spending by Student Type[14]

Student Type	# of Students	Per Student Ancillary Spending	Aggregate Ancillary Spending ($M)
Undergraduate			
On-Campus	973	$16,473	$16.1
Off-Campus	1,691	$15,934	$25.1
Commuters	492	$5,988	$2.9
Graduate			
On-Campus	10	$16,473	$0.1
Off-Campus	356	$15,934	$5.7
Commuters	104	$5,988	$0.6
Total Aggregate Student Spending	**3,626**		**$50.5**

Source: Western Oregon University (2026); Econsult Solutions, Inc. (2026)

The analysis accounts for the geographic distribution of student spending, recognizing that not all expenditures remain within the immediate area, particularly given online shopping patterns and student purchases made outside the region. A portion of this spending exits the region immediately, thus lacking a multiplier effect within the local economy.

To address this, ESI's modeling approach conservatively incorporates only the retail margin (i.e., the difference between the purchase price for the retailer and the sales price paid by the customer). Of the estimated $50.5 million in annual student ancillary spending, approximately $39.8 million circulates within Polk County; and the entire $50.5 million is retained within the WOU Region and State of Oregon economies (Figure 5.8).

These figures reflect careful consideration of student spending patterns across different geographic boundaries and provide a conservative estimate of the share of spending that truly generates local and statewide economic effects.

Figure 5.8: Estimated Annual Aggregate Ancillary Student Spending Capture within Polk County, the WOU Region, and the State of Oregon

Student Type	Polk County	WOU Region	Oregon
On-Campus	$14.2	$16.2	$16.2
Off-Campus	$23.8	$30.7	$30.7
Commuters	$1.8	$3.6	$3.6
Total	**$39.8**	**$50.5**	**$50.5**

Source: Western Oregon University (2026); Econsult Solutions, Inc. (2026)

[14] Totals may not sum due to rounding.

Western Oregon University Direct Visitor Spending

Western Oregon University serves as an important year-round visitor destination, drawing a wide array of guests to its campus from across Oregon and beyond. These visitors make meaningful contributions to the regional economy through spending that supports local jobs and generates tax revenues for the County, region, and state.

To accurately quantify the economic impact of these visits, detailed spending profiles were developed based on visit purpose, trip length, travel distance, event type, and visitor demographics, acknowledging that different categories of visitors have distinct spending behaviors. Aggregate annual Western Oregon University visitor spending estimates were developed using attendance and participation data provided by the university. These data were combined with per-visitor spending profiles segmented by industry, such as lodging, food services, retail, and transportation.

As with student spending, conservative geographic assumptions were applied to estimate the share of spending captured within the region, while excluding expenditures already reflected in Western Oregon University's operational budget. Attendees traveling from less than 50 miles away are classified as local; those arriving from 50–100 miles away are categorized as day trips; and those traveling more than 100 miles are considered overnight guests. Figure 5.9 displays visitation figures by event type and estimated visitor geography of origin.

Figure 5.9: Estimated Aggregate Annual Spending by Western Oregon University Visitors, by Estimated Visitor Geography of Origin

Event	Local	Daytrip	Overnight	Total Visitors
Commencement	2,176	1,088	363	3,626
Athletics	9,473	9,473	0	18,947
Admissions	613	1,599	453	2,665
Move-In	417	1,088	308	1,813
Conferences and Events	21,785	9,077	5,446	36,309
Town Halls	600	450	450	1,500
Total Visitors	**35,064**	**22,775**	**7,020**	**64,860**

Source: Western Oregon University (2026); Econsult Solutions, Inc. (2026)

Economic Impact from Ancillary Spending by Students and Visitors

Ancillary spending by students, visitors, and event attendees has a multiplier effect throughout the region, generating the following annual economic impacts (Figure 5.10):

- $58.3 million in total output within Polk County, supporting 380 jobs with $10.4 million in earnings;
- $80.5 million in total output within the WOU Region, supporting 500 jobs with $15.5 million in earnings; and

- $88.8 million in total output within the State of Oregon, supporting 540 jobs with $18.1 million in earnings.

Figure 5.10: Estimated Annual Economic Impact from Ancillary Spending by Students and Visitors

Impact Type	Polk County	WOU Region	Oregon
Direct Impact ($M)	$44.7	$57.0	$57.1
Indirect & Induced Impact ($M)	$13.6	$23.4	$31.6
Total Economic Impact ($M)	**$58.3**	**$80.5**	**$88.8**
Annual Employment Supported (FTE)	**380**	**500**	**540**
Employee Compensation ($M)	**$10.4**	**$15.5**	**$18.1**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2026)

Western Oregon University Ancillary Spending Generates Tax Revenue

In aggregate, ancillary spending by students and their visitors, prospective students, and other university event guests generates nearly $1.2 million in annual tax revenues to the State of Oregon (Figure 5.11).

Figure 5.11: Estimated Aggregate Annual Tax Revenue Impact from Ancillary Spending to Oregon

Tax Type	Oregon
Income Tax	$916,000
Corporate Income Tax	$248,400
Lodging Tax	$25,600
Aggregate Tax Impact	**$1,190,000**

Source: Econsult Solutions, Inc. (2026); IMPLAN (2024)

In addition to state taxes, WOU also generates local taxes through transient lodging taxes (TLTs). These taxes are levied at the city level for Monmouth and at the state level in Oregon. In total, spending activity associated with WOU generates approximately $33,200 in TLTs (Figure 5.12).

Figure 5.12: Estimated TLT Revenue Impact from Ancillary Spending by WOU Students and Visitors

Tax Type	Tax Revenue Generated
Monmouth TLT (9%)	$7,670
Oregon TLT (1.5%)	$25,560
Total Tax Impact	**$33,230**

Source: Econsult Solutions, Inc. (2026); Monmouth (2026); Oregon Dept. of Revenue (2026)

5.5. The Economic Impact from Western Oregon University's Alumni Wage Premium

Western Oregon University's economic impact extends well beyond its direct operations, capital investments, and ancillary spending by students and visitors. Among its most far-reaching contributions is the economic value generated through its core educational mission. A Western Oregon University degree translates into enhanced earning potential for its graduates, particularly in fields that are critical to the economies of Polk County, the WOU Region, and the State of Oregon. This wage premium—the additional income earned by Western Oregon University alumni relative to individuals without the same level of educational attainment—creates lasting economic value that reverberates across the regions where alumni live and work.

By equipping graduates with in-demand credentials, applied knowledge, and workforce-relevant skills, Western Oregon University fosters a more competitive and resilient regional workforce. Alumni contribute to local economies not only through their elevated earnings and household spending, but also as educators, healthcare professionals, business leaders, public servants, and community anchors. This sustained wage premium bolsters long-term regional prosperity and reinforces Western Oregon University's role as a driver of upward mobility, talent retention, and economic growth.

As of FY2025, Western Oregon University's alumni network includes more than 50,300 graduates, with approximately 71 percent residing in Oregon. The value of a Western Oregon University degree corresponds to an annual wage premium of over $72.9 million in Polk County; $191.5 million in the WOU Region; and $513.4 million within the State of Oregon. This additional household income generates further spending within the region, stimulating spillover economic impact.

Within Polk County, the wage premium leads to $37.6 million in economic impact, supporting 210 jobs with $9 million in employee compensation. The Western Oregon University alumni wage premium also leads to $204.7 million in economic impact within the WOU Region, supporting 1,040 full-time jobs with $57.5 million in employee compensation; and $490 million in economic impact, supporting 2,340 full-time jobs with $145 million in employee compensation in the State of Oregon.

The wage premium and subsequent increased alumni spending within Oregon increases the tax base, thereby generating approximately $39 million in taxes for Oregon.

Defining Alumni Wage Premium

In today's knowledge-driven economy, the education and intellectual capital of workers are among the most valuable assets influencing organizational productivity and regional competitiveness. Individuals who graduate from Western Oregon University, equipped with specialized expertise, advanced credentials, and workforce-relevant skills, are rewarded with higher wages in the labor market. These elevated earnings reflect both the practical value of a Western Oregon University education and the institution's strong alignment with the needs of employers across Polk County, the WOU Region, and the State of Oregon.

While the wage premium calculations provide valuable insight into earnings associated with degree attainment, they do not capture the full economic benefit of Western Oregon University's educational

pathways. Clinical placements, educator preparation experiences, internships, applied learning opportunities, and other workforce-aligned experiential programs significantly enhance participants' long-term earning potential through skill development, professional networks, and direct pathways into Oregon's labor market. These valuable career advancement mechanisms, though not fully quantified in the current wage data, represent additional economic impact pathways through which the university contributes to individual earning capacity and regional economic strength.

Wage premium analysis quantifies the broader economic benefit generated by degree-earning Western Oregon University alumni. The analysis estimates the additional income earned by graduates within Polk County, the WOU Region, and the State of Oregon, translating that income into increased household spending. This increased spending supports regional jobs, stimulates business activity, and generates state tax revenue. In aggregate, this enhanced earning power results in millions of additional dollars circulating through Oregon's economy each year, underscoring the enduring impact of Western Oregon University on regional prosperity, workforce resilience, and upward mobility.

Direct Alumni Wage Premium

Data provided by Western Oregon University indicate that nearly 36,000 living alumni reside in Oregon, including approximately 5,100 alumni living in Polk County.

Of the university's total living alumni base of bachelors and masters students, 76 percent reside in Oregon, reflecting Western Oregon University's strong role in retaining graduates within the state and supporting local and regional workforce needs. A meaningful share of these alumni remain in Western Oregon and surrounding rural communities, reinforcing the university's contribution to talent retention and long-term regional resilience.

Of the total 50,300 living alumni, approximately 47,000 completed a bachelors or master's degree. Approximately 35,800, or 71 percent, reside in Oregon. Of those living alumni, it is assumed that 70.6% percent are currently employed (as opposed to retired, unemployed, or otherwise out of the workforce) (Figure 5.13).

Figure 5.13: Distribution of Western Oregon University Alumni in the Workforce

Degree Type	Residing in Polk County	Residing in WOU Region minus Polk County	Residing in the Rest of Oregon minus WOU Region	Total
Bachelor's	4,019	10,559	13,735	28,313
Advanced	1,066	2,801	3,644	7,511
Total Alumni	5,085	13,360	17,379	35,824
Labor Force Participation Rate	70.60%	70.60%	70.60%	70.60%
Estimated Total Working Alumni	**3,590**	**9,432**	**12,269**	**25,291**

Sources: Bureau of Labor Statistics (2026); Western Oregon University (2026); Econsult Solutions, Inc. (2026)[15]

An aggregate increase in earning potential across each geography can be estimated by analyzing both the overall rise in educational attainment within the workforce and the wage premium specifically associated with a Western Oregon University degree. Drawing on federal data and institutional analysis, the average annual wage premium attributable to increased educational attainment for Western Oregon University alumni is estimated to be approximately $20,300 for bachelor's degree holders, and $20,200 for advanced degree holders within Oregon.

The individual wage premium was calculated as the difference between median earnings for Western Oregon University alumni at various degree attainment levels and the median earnings for all Oregon residents at one degree attainment level below. For example, the wage premium for a Western Oregon University alumnus with a bachelor's degree living in Oregon equals the median earnings of Western Oregon University alumni with bachelor's degrees minus the median earnings for all Oregon residents with an associate degree or professional certificate (Figure 5.14).

Figure 5.14: Estimated Wage Premium for Alumni Residing in Oregon

Degree Type	Western Oregon University Employed	WOU Wage Premium per Alumnus(a)	Total Modeled AWP ($M)
Bachelor's Degree	19,989	$20,300	$406.3
Advanced Degree	5,303	$20,200	$107.1

Sources: American Community Survey (2024); College Scorecard (2026); Econsult Solutions, Inc. (2026)

The wage premium is then applied to the estimated number of Western Oregon University alumni working within Polk County, the WOU Region, and across the rest of Oregon, segmented by degree level. The resulting aggregate wage premium reflects the additional household income earned by alumni as a direct outcome of the education, credentials, and workforce preparation they received at Western Oregon University.

[15] U.S. Bureau of Labor Statistics, "Employment Status of the Civilian Population 25 Years and Over by Educational Attainment" (March 2026), https://www.bls.gov/news.release/empsit.t04.htm

Economic Impact from Alumni Wage Premium

The additional earning potential associated with a Western Oregon University degree has both direct and consequential impacts on the university's alumni. Beyond the benefits to individual graduates, the wage premium generated by Western Oregon University alumni produces a spillover impact on regional economies because alumni have greater disposable income to spend within Polk County, the WOU Region, and across Oregon.

The effects of this additional household spending are estimated to generate on an annual basis (Figure 5.15):

- $37.6 million in economic impact within Polk County, supporting 210 direct, indirect, and induced jobs with $9 million in employee compensation;
- $204.7 million in total economic impact within the WOU Region, supporting 1,040 direct, indirect, and induced jobs with $57.5 million in employee compensation; and
- $490 million in total economic impact statewide, supporting 2,340 direct, indirect, and induced jobs with $145.0 million in employee compensation.

Figure 5.15: Annual Economic Impact Attributable to Western Oregon University Wage Premium Effects within Polk County, the WOU Region, and Oregon

Impact Type	Polk County	WOU Region	Oregon
Direct Wage Premium ($M)	$72.9	$264.3	$513.4
Total Impact ($M)	**$37.6**	**$204.7**	**$490.0**
Employment Supported (FTE)	**210**	**1,040**	**2,340**
Employee Compensation ($M)	**$9.0**	**$57.5**	**$145.0**

Sources: Western Oregon University (2026); Econsult Solutions, Inc. (2026); IMPLAN (2024)

Alumni Wage Premium Generates Tax Revenue

Increased household income also translates into increased tax revenue for the State of Oregon, where many Western Oregon University alumni reside and work. Oregon realizes additional tax revenue from the Western Oregon University alumni wage premium through higher personal income tax collections and business-related tax revenues supported by increased household spending.

Furthermore, the wage premium indirectly generates additional revenue through the broader economic activity created as alumni spend their higher earnings across Oregon's economy. In total, $39.0 million in tax revenue is generated statewide from Western Oregon University's alumni wage premium (Figure 5.16).

Figure 5.16: Fiscal Impacts of the Wage Premium Associated with Western Oregon University in Oregon ($M)

Tax Type	Oregon
Personal Income Tax (paid on Alumni Wage Premium) ($M)	$30.3
Personal Income Tax (from WOU Alumni Spending) ($M)	$7.2
Total Personal Income Tax ($M)	$37.5
Corporate Income Tax ($M)	$1.5
Aggregate Tax Impact ($M)	**$39.0**

Sources: Western Oregon University (2026); Econsult Solutions, Inc. (2026); Oregon ACFR (2024)



5.6. Western Oregon University's Social and Community Impact

Western Oregon University is deeply embedded in the civic and economic life of the region. The university maintains active partnerships with 19 local and regional organizations spanning municipal government, K–12 education, economic development, food security, and community health. These include the cities of Monmouth and Independence, Central School District, the Willamette Education Service District, the Marion and Polk Early Learning Hub, Salem Economic Development Corporation (SEDCOR), the Salem and Dallas Chambers of Commerce, the Monmouth-Independence YMCA, and the Ella Curran Food Bank and Marion and Polk Food Share, among others. Through these relationships, WOU functions not only as the largest employer and institutional anchor in its immediate community, but also as a convening partner for economic development, workforce planning, and social service delivery across Polk and Marion counties. Figure 5.17 provides a complete listing of the community organizations in which WOU is actively involved.

Figure 5.17: Community and Civic Organization Partnerships

Organization
City of Independence
Central School District
Ella Curran Food Bank
Marion and Polk Food Share
Monmouth Business Association
Monmouth-Independence Community Foundation
Monmouth-Independence Rotary Club
Salem Economic Development Corp. (SEDCOR)
Salem Health Foundation
Willamette Education Service District
City of Monmouth
Dallas Chamber of Commerce
Independence Downtown Association
Marion and Polk Early Learning Hub
Monmouth-Independence Chamber of Commerce
Monmouth-Independence Networks (MINET)
Monmouth-Independence YMCA
Salem Chamber of Commerce
Salem Rotary

Source: Western Oregon University (2026); Econsult Solutions, Inc. (2026)

The Willamette Promise

The Willamette Promise is a dual credit partnership, now celebrating 12 years, that enables Oregon high school students to earn transferable college credit while strengthening the state's college-going culture and educational attainment. Launched in 2014–15 and coordinated by the Willamette Education Service District in partnership with Western Oregon University and the Oregon Institute of Technology, the

program uses a distinctive assessment-based learning model in which credit is awarded based on demonstrated mastery of university-aligned outcomes rather than a traditional course structure. Today, the program connects 46 school districts across six Educational Service Districts and offers 37 dual credit courses, 26 of them through WOU, all at an affordable flat rate of $30 per academic year with fee waivers available for eligible students. In its first decade, more than 21,800 students participated, earning 141,217 college credits and generating an estimated $30.6 million in tuition savings for Oregon families. The program has grown from 3,641 credits awarded to 601 students in its launch year to 20,909 credits awarded to nearly 3,000 students in 2024-25, while serving a notably diverse population (32.2% Hispanic/Latino and 34.8% English learners) whose participants maintain an average GPA of 3.6, an outcome consistent with research showing that students who earn college credit in high school are more likely to enroll in college and persist through their first year.

An Enduring Commitment to Social Impact

One of WOU's most significant contributions to social impact extends well beyond its immediate region through The Research Institute (TRI), an applied research and technical assistance center established in 1961. Operating with an annual budget of approximately $11.2 million funded through over $23 million in external grants and contracts, TRI facilitates positive change in education, health, and human services systems at local, state, and national levels. For example, TRI's Center on Workforce and System Development provides leadership and technical assistance for 15 Child Care Resource and Referral programs serving every county in Oregon and operates Find Child Care Oregon, the state's childcare referral system. The Research Institute at Western Oregon University has a 60-year history of working in education, family and community services, and ability services; with key programming and initiatives that promote positive change in education, health, and human services (Figure 5.18).

Figure 5.18: The Research Institute (TRI) — Centers and Programs

TRI Center	Key Programs	Scope / Impact
Center on Workforce and System Development (CWSD)	Central Coordination of Child Care Resource and Referral (CCR&R); Find Child Care Oregon	Technical assistance for 15 CCR&R programs serving all Oregon counties; statewide childcare referral system
Center on Early Learning Support and Innovation (CELSI)	Spark (Quality Recognition and Improvement System); Start Up and Expansion Grants; Child Care Substitutes of Oregon (CCSO)	Statewide quality improvement for early learning programs; grants to increase childcare capacity; subsidized substitute system for early learning providers
Center on Research, Evaluation & Analysis (CREA)	DEMILO (Developing Elementary Mathematics Instructional Leaders in Oregon); QRIS process evaluation	K–12 math instructional leadership development statewide; evaluation of Oregon's early learning quality system
Additional Programs	Oregon Driver Education instructor training (ODOT-TSO grant); Protactile Language Interpreting National Education Program (PLI)	Statewide driver education instructor certification and curriculum development; national Protactile Language research and training for Deaf communities

Source: Western Oregon University (2026); Econsult Solutions, Inc. (2026)

WOU's social impact is further amplified through structured student civic engagement and an institutional commitment to equity and access. The Center for Professional Pathways organizes annual community service events including Martin Luther King Jr. Week, Earth Day, and Community Impact Day, and operates the WOU Community Internship Program, which places students in local organizations for approximately 10 hours per week across winter and spring terms. The University's Multicultural Student Services and Programs, Student Enrichment Program, and comprehensive disability services ensure that the institution's benefits extend to students from historically underserved communities, who in turn contribute to the civic life and workforce capacity of the mid-Willamette Valley and the state. TRI's own workforce reflects this commitment to diversity, with over half of its full-time employees fluent in at least one language in addition to English, enabling culturally responsive service delivery across Oregon's increasingly diverse communities.


WESTERN OREGON
UNIVERSITY
FOUNDED 1856

Appendix A: Input-Output Methodology

In an inter-connected economy, every direct dollar generates two spillover impacts:

- First, some amount of the proportion of that expenditure that goes to the purchase of goods and services gets circulated back into an economy when those goods and services are purchased from local vendors. This represents what is known as the **indirect effect** and reflects the fact that local purchases of goods and services support local vendors, who in turn require additional purchasing with their own set of vendors.
- Second, some amount of the proportion of that expenditure that goes to labor income gets circulated back into an economy when those employees spend some of their earnings on various goods and services. This represents what is known as the **induced effect** and reflects the fact that some of those goods and services will be purchased from local vendors, further stimulating the economy.

To model the impacts resulting from the direct expenditures of Oregon's Regional Public Universities, ESI developed a customized economic impact model using IMPLAN's input/output modeling system. Utilizing an industry standard approach, IMPLAN's input/output modeling system allows users to assess the economic and job creation impacts of industry-based events and public policy changes within a county or its surrounding area. IMPLAN has developed a social accounting matrix (SAM) that accounts for the flow of commodities through economies. From this matrix, IMPLAN also determines the regional purchase coefficient (RPC), or the proportion of local supply that satisfies local demand. These values not only establish the types of goods and services supported by an industry or institution, but also the high level at which they are acquired locally. This assessment determines the multiplier basis for the local and regional models created in the IMPLAN modeling system. IMPLAN takes these multipliers and divides them into 528 industry categories in accordance with the North American Industrial Classification System (NAICS) codes.

Explanation of Multipliers[16]

The use and application of multipliers are intuitive. Multipliers, in their most basic form, are the result of an algebraic analysis expressing how two inputs are interconnected in the production of an output. The result of the equation generates a multiplier that is broken down into direct, indirect, and induced effects. In a generalized example: if the multiplier for good "X" to good "Y" is 3, then the direct effect of good "X" on "Y" is 1, with indirect and induced effects of 2. Essentially, every unit of good "X" supports 2 units of good "Y".

When implemented on a large complex scale, such as that of the US economy or any subsection of it, multiplier effects across industries can be complicated. However, the same general concept comes into play. Each industry has largely different and varied inputs into other industries. The quantity of the

[16] Lahr, Michael. "Input-Output Analysis: Technical Description and Application." Rutgers University Edward J. Bloustein School of Planning and Public Policy.

output is largely decided by the scale and efficiency of the industries involved. As a result, the sum of those inputs equates to an output product plus a value added/component. By arranging these inputs and outputs by industry in a matrix and performing some algebra to find the Leontief inverse matrix, each industry's effect on final demand can be estimated. Additionally, the direct, indirect, and induced effects can also be determined. Direct effects include direct purchases for production, indirect effects include expenses during production, and induced effects concern the expenditures of employees directly involved with production. Using building construction as an example, the direct effects would include materials, brick, steel, and mortar, the indirect effects would involve the steel fabrication and concrete mixing, and the induced effects would consider purchases by construction workers using their wages. While impacts vary in size, each industry has rippling effects throughout the economy. By using an input-output model, these effects can be more accurately quantified and explained.

IMPLAN is one of several popular choices for regional input-output modeling. Each system has its own nuances in establishing proper location coefficients. IMPLAN uses a location quotient to determine its regional purchase coefficient (RPC). This represents the proportion of demand for a good that is filled locally, a measure that helps determine the multiplier for the localized region. Additionally, IMPLAN also accounts for inter-institutional transfers (e.g., firms to households, households to the government, etc.) through its social account matrix (SAM) multipliers. IMPLAN takes the multipliers and divides them into industry categories in accordance with the North American Industrial Classification System (NAICS) codes, allowing a comprehensive breakdown of a region's multipliers by industry to be shown.

Despite the usefulness of input/output modeling, there are some shortcomings to the system. Notably, input-output models ignore economies of scale. Input-output models assume that costs and inputs remain proportionate through different levels of production. Further, multipliers are not generally updated on a timely basis; most multipliers are prone to be outdated with the current economy. If the multipliers are sourced from a year of a recession economy, the multipliers may not accurately represent the flows from an economic boom period. Additionally, multipliers may not capture sudden legal or technological changes which may improve or decrease efficiency in the production process.

Glossary of Terms for Input/Output Models

Multiplier Effect– the notion that initial outlays have a ripple effect on a local economy, to the extent that direct output leads to indirect and induced output.

Economic Impacts– total expenditures, employment, and labor income generated.

Tax Revenue Impacts– local and/or state tax revenues generated.

Direct Output– initial outlays usually associated with the project or activity being modeled; examples: one-time upfront construction and related expenditures associated with a new or renovated facility, annual expenditures associated with ongoing facility maintenance and/or operating activity.

Direct Employment– the number of annual jobs associated with direct output (including full and part-time employment)

Direct Labor Income– the salaries and wages earned by employees, contractors, and proprietors as part of the direct output.

Indirect Output– indirect and induced outlays resulting from the direct output; examples: vendors increasing production to meet new demand associated with the direct output, workers spending direct labor income on various purchases within the local economy.

Indirect/Induced Employment– the number of annual jobs associated with indirect/induced output (including full and part-time employment)

Indirect Labor Income– the salaries and wages earned by employees, contractors, and proprietors as part of the indirect output.

Total Output– the sum of direct output and indirect output.

Total Employment– the sum of direct employment and indirect employment.

Total Labor income– the sum of direct labor income and indirect labor income.

Source: Econsult Solutions, Inc. (2026)

Appendix B: Fiscal Impact Modeling

IMPLAN only provides a rough estimate of the combined fiscal impact of increased economic activity on state and local governments. Consequently, Econsult Solutions, Inc. (ESI) has constructed a model that takes the output from the IMPLAN model and generates detailed estimates of the increases in state and local tax collections that arise from new investments in the region. Those revenues are in fact a part of the total economic impact of a new project that is often ignored in conventional economic impact analyses.

The ESI fiscal impact model combines IMPLAN outputs with the relevant tax types and tax bases associated with the jurisdictions for which fiscal impact is being modeled. Specifically, the estimated wages and salaries supported by the direct, indirect, and induced expenditures generated by the model are used to apportion the net increase in the income tax bases. The estimated value added from IMPLAN is utilized in estimating the sales and business tax impacts in the regions. The resulting estimates represent the projected tax revenue gains to the jurisdictions resulting from the increased business activity and its attendant indirect and induced effects.

Appendix C: About Econsult Solutions, Inc.

This report was produced by Econsult Solutions, Inc. (ESI), which provides businesses and public policy makers with consulting and thought leadership services in urban economics, real estate, transportation, public infrastructure, economic development, public policy and finance, and strategic planning, as well as expert witness services for litigation support.

ESI combines robust quantitative analysis with trusted expert insights to create sustainable solutions. The firm works collaboratively with its clients, and draws in expertise, when necessary, from our network of experts and partners across industries, regions, and management practices. Based in Philadelphia, the firm supports clients nationwide.

ESI ECONSULT SOLUTIONS INC.

economics | strategy | insight

1435 WALNUT STREET, 4TH FLOOR, PHILADELPHIA, PA 19102

ECONSULTSOLUTIONS.COM | 215-717-2777