Economic importance of Outdoor Recreation

IN CHELAN AND DOUGLAS COUNTIES

Booklet produced by

Wenatchee Valley TREAD
(Trails, Recreation, Education, Advocacy, Development) of Chelan and Douglas Counties
Outdoor recreation is a major economic driver for many mountain towns in the western United States. Outdoor recreation is a central factor in where people choose to live and work. Many people, including millennials and active retirees, desire quick and easy access to natural areas for recreational, health and social purposes. Mountain towns often rely on outdoor recreation activities and facilities to attract visitors to boost their tourism industries.

Few places in the United States can boast of the natural assets that Chelan and Douglas counties possess along the east slopes of the Cascade Mountains. Despite that competitive advantage, the region has faced challenges in developing a full-fledged outdoor recreation economy and infrastructure.

Outdoor recreation — across all seasons and for non-motorized and motorized — is growing in economic and community importance in Chelan and Douglas counties, according to a recent study by EcoNorthwest.

Why recreate outdoors in Chelan & Douglas Counties?

- **70%** of residents in Chelan and Douglas counties recreate outdoors because it improves their physical and mental health, according to a 2016 survey by EcoNorthwest. 54 percent cited relaxation and fun and 43 percent recreate because it means spending time with family and friends.

- Furthermore, public land opportunities are particularly scarce in Washington State relative to other states. Development of more opportunities in Chelan and Douglas counties likely will lead to more state residents staying home to recreate rather than traveling to other states or Canada.

The following pages provide a look at the current state of outdoor recreation in the region, along with its challenges, opportunities and future potential.

**Population of Chelan and Douglas Counties:**

- **118,478**

**Square miles of land in Chelan County:**

- **2,921**

**Publicly-owned land in Chelan County:**

- **82%**

**Square miles of land in Douglas County:**

- **1,820**

**Publicly-owned land in Douglas County:**

- **15%**

An estimated 54,049 Chelan County residents — or 72.3% of the county's overall population — utilized a trail at some point in 2016.

An estimated 29,481 Douglas County residents — or 71.4% of the county's overall population — utilized a trail at some point in 2016.

### Economic impact

- **Total spent on outdoor recreation overall:** $477.9 million
- **Total spent on outdoor recreation equipment:** $150 million
- **Total spent on outdoor recreation events:** $33 million
- **State and local taxes generated from sales:** $19.4 million

Businesses associated with outdoor recreation and tourism collectively provide nearly 20 percent of private regional employment in Chelan and Douglas counties.

**3,330:** Number of jobs supported by outdoor recreation in Chelan and Douglas counties

**Sources:** State of Washington; 2014 study by Earth Economics for the Washington State Recreation and Conservation Office; 2017 study by EcoNorthwest of the Economic Importance of Outdoor Recreation in Chelan and Douglas Counties
**Impact of our summer trails**

**Mountain biking:** 8.5 trail bike visits (a visit is defined as one biker on the trail for one day) were undertaken per Chelan-Douglas resident in 2016.

- An estimated $44.6 million was spent on mountain biking by Chelan-Douglas residents in 2016 — or $44.87 per mountain biking visit.

**Hiking:**
- 8.7 hiking visits (a visit is defined as one hiker on the trail for one day) were undertaken per Chelan-Douglas resident in 2016.
- An estimated $16 million was spent on hiking by Chelan-Douglas residents in 2016 — or $45.20 per hiking visit.
- An estimated $50.4 million was spent on hiking by visitors to Chelan and Douglas counties in 2016.

**Motorized off-road riding:**
- In Washington State:
  - Number of participants annually: 786,907
  - Amount spent per activity day: $143
  - Amount spent per participant annually: $2,442

- **Activities in Okanogan-Wenatchee National Forest (2018):**
  - Hiking/walking: 44 percent
  - Viewing wildlife: 30.5 percent
  - Downhill skiing: 15.6 percent
  - Fishing: 12.8 percent
  - Cross-country skiing: 11.5 percent

- **Motorized trail:** 4.4 percent
  - Biking: 2.4 percent
  - Off-highway vehicle riding: 2.0 percent

- **Okanogan-Wenatchee National Forest (2018):**
  - Total acres: 4.3 million
  - Acres open to motorized travel: 2.6 million
  - Miles of roads: 4,000
  - Miles of motorized system trails: 1,000

**Running:**
- RunWenatchee attracts more than 2,500 participants to its Wenatchee Valley Trail Run Series and community road races each year.
  - About 40 percent come from outside the region to take part in runs in the Wenatchee Foothills, Wenatchee National Forest, Leavenworth Ski Hill, City of Wenatchee, and Apple Capital Loop Trail.

**Rock climbing:**
- 20% of visitors report rock climbing in Chelan and Douglas counties. That is nearly twice the statewide average. About the same percentage of residents participate in rock climbing at least once annually.

**Leavenworth — 23 miles (near Leavenworth Ski Hill, Freund Canyon, Fourth of July, Icicle Ridge)**

**Chelan/Manson — 41 miles (near Echo Ridge, Chelan Butte)**

**Cashmere — 24 miles (near Devil’s Gulch)**

88% of visitors to Chelan and Douglas counties participate in some sort of trail-based activity while in the region.

**Sources:** 2017 study by EcoNorthwest of the Economic Importance of Outdoor Recreation in Chelan and Douglas Counties; Evergreen Mountain Bike Alliance; RunWenatchee; Washington State Comprehensive Outdoor Recreation Plan; Earth Economics data; Washington State Office of Financial Management.
Impact of our winter trails

Both residents and visitors rank snowshoeing, downhill skiing, and Nordic skiing as their top three snow sports.

Expenditures by skiers and snowboarders at Mission Ridge in 2016-2017:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Estimated spending per visit</th>
<th>Estimated total spending for the season</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snowboarding</td>
<td>$71</td>
<td>$5.5 million</td>
</tr>
<tr>
<td>Downhill skiing</td>
<td>$1,160</td>
<td></td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>$580</td>
<td></td>
</tr>
<tr>
<td>Nordic skiing</td>
<td>$177</td>
<td></td>
</tr>
<tr>
<td>Snowboarding</td>
<td>$1,297</td>
<td></td>
</tr>
</tbody>
</table>

There are 1,320 miles of snowmobile trails accessible from Sno-Parks in Chelan County.

Mission Ridge Ski & Board Resort ticket sales by region:

<table>
<thead>
<tr>
<th>Region</th>
<th>Online Sales</th>
<th>Window Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Washington</td>
<td>67.3%</td>
<td>54.7%</td>
</tr>
<tr>
<td>Eastern Washington</td>
<td>17.6%</td>
<td>30.6%</td>
</tr>
<tr>
<td>Local</td>
<td>15.1%</td>
<td>14.7%</td>
</tr>
</tbody>
</table>

Sources: Mission Ridge Ski & Board Resort; Washington State Comprehensive Outdoor Recreation Plan; RCO/Earth Economics data

Impact of our water trails

Fishing is the most popular water-based recreation activity for residents of Chelan and Douglas counties, followed by stand-up paddle boarding, kayaking and canoeing, motorized boating, and whitewater rafting. For visitors, motorized boating is the top water-based recreation activity followed by stand-up paddle boarding, fishing, kayaking and canoeing, and waterskiing.

Motor boating:

- Visitors who motor boat in Chelan and Douglas counties: 34 percent
- Residents who motor boat in Chelan and Douglas counties: 31 percent

Motor boating:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Amount spent per participant annually in the state</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snowmobiling</td>
<td>$882</td>
</tr>
<tr>
<td>Fishing</td>
<td>$3,007</td>
</tr>
<tr>
<td>Paddling kayaking &amp; rafting</td>
<td>$767</td>
</tr>
</tbody>
</table>

Nordic trails in Chelan County:

- Icicle River Trail: 8 kilometers of trails
- Leavenworth Golf Course: 8 kilometers
- Leavenworth Ski Hill: 7 kilometers
- Waterfront Park: 3 kilometers
- Plain Valley Nordic Trail System: 22 kilometers
- Lake Wenatchee State Park: 18 kilometers
- Kahler Glen Golf Course: 10 kilometers
- Echo Ridge Nordic Ski Area: 40 kilometers

Challenges:

The recent acquisitions of Stevens Pass and Crystal Mountain, respectively, by Vail Resorts and Alterra Mountain Co. creates additional pressure on Mission Ridge Ski & Board Resort near Wenatchee. In an era of increasing ski industry consolidation, where a handful of companies control more and more winter sport terrain, Mission Ridge is facing pressure to stay modern and relevant with its infrastructure and services.

Opportunities:

Mission Ridge Ski & Board Resort has submitted plans to expand the ski area, introduce housing and address capacity issues, in order to remain viable in the highly competitive ski industry. Plans call for the construction of 870 residential units, a lodge and commercial space over 20 years, plus the addition of three new chair lifts, and parking lot improvements.

Projected increase in visitation tied to Mission Ridge expansion:

- 2016-17 Skier Visits: 114,436
- Year 1 After Expansion Skier Visits: 127,367
- Year 5 After Expansion Skier Visits: 154,722
- Year 10 After Expansion Skier Visits: 168,305

Sources: Washington State Comprehensive Outdoor Recreation Plan; Mission Ridge Ski & Board Resort

Challenges:

The 2013-18 Washington State Comprehensive Outdoor Recreation Plan found many residents in the North Central Washington not satisfied with their access to non-motorized boating (stand-up paddling, kayaking, canoeing) and fishing.

In addition, a 2016 survey by EcoNorthwest found Chelan-Douglas residents and visitors requesting more docks and access to water, including access provided by facilities.
The potential for Chelan and Douglas counties to become Washington state’s premier outdoor recreation spot is immense. Chelan and Douglas counties possess world-class natural assets — mountains, valleys, rivers and lakes — and are located just two hours from a major population center. The highest-in-demand activities — hiking, mountain biking, fishing, paddling, and skiing — all fit well with the region’s topography. In 2016, outdoor recreation was a $477.9 million industry in the two counties and supported more than 3,300 jobs.

Yet a fully developed outdoor recreation system and economy in Chelan and Douglas has yet to be realized. Two recent studies have found residents and visitors clamoring for improved access, and more and better trails, trailheads, parking, signage, docks, facilities, and other amenities. For instance, the number of mountain biking trails, which are often co-utilized by trail runners and hikers, pales in comparison to other recreation hubs in the West.

If the region were to add more trails and docks and related amenities, it would generate millions and millions of dollars for the local economy. One example: Getting one more mountain-bike trip per resident every year (it is currently at 8.5 trips per resident), would add $5.26 million annually to local coffers. Another example: if Mission Ridge Ski & Board Resort’s expansion plans go through, it would mean a $12.1 million annual boost within five years.

The benefits go beyond just generating more dollars for the region. Thanks to technological advances, people are increasingly choosing to live and work from places that offer quick and easy access to natural areas. They view outdoor recreation as central to a healthy lifestyle and do not want to travel long distances to access this world.

The question is: Will the region take the next steps?