

Deschutes Estuary Restoration as a Tourism Promotion and Economic Development Strategy: Executive Summary

- **Washington State's** outdoor recreation economy mid-ranking when scaled to resident population and compared to other States; it is one of two states with no State tourism promotion budget; the Puget Sound is the strongest common tourism asset for Legislative Districts that border it; Capitol Estuary would be a strong symbol for Tribal Relations and Washington State values
- **Thurston County's** per capita outdoor recreation employment is in the lowest quintile for all Washington Counties; food, beverage, accommodations, and retail are among the largest employers in the county; 30% of the county's populace is low income or in poverty
- The **City of Olympia** is one of the worst performing Pacific Northwest cities in terms of tourism expenditures, despite a robust winter season from colleges and the legislature
- **Urban Estuaries** (within a 5-10 minute walk of city center) are globally unique; estuary restoration is an opportunity for a unique attraction and would likely be a draw and powerful symbol for Washington's Capitol

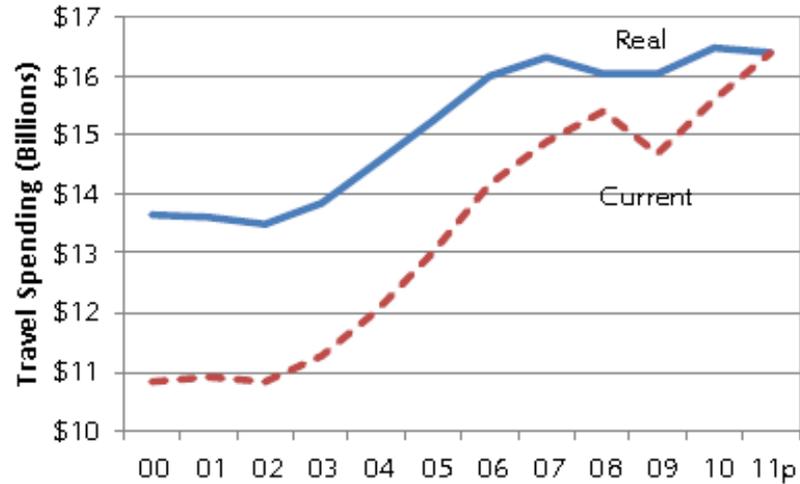
Nearly 50% of the state budget is from sales tax....state tax structure is set up to take advantage of outdoor recreation expenditures

State Level

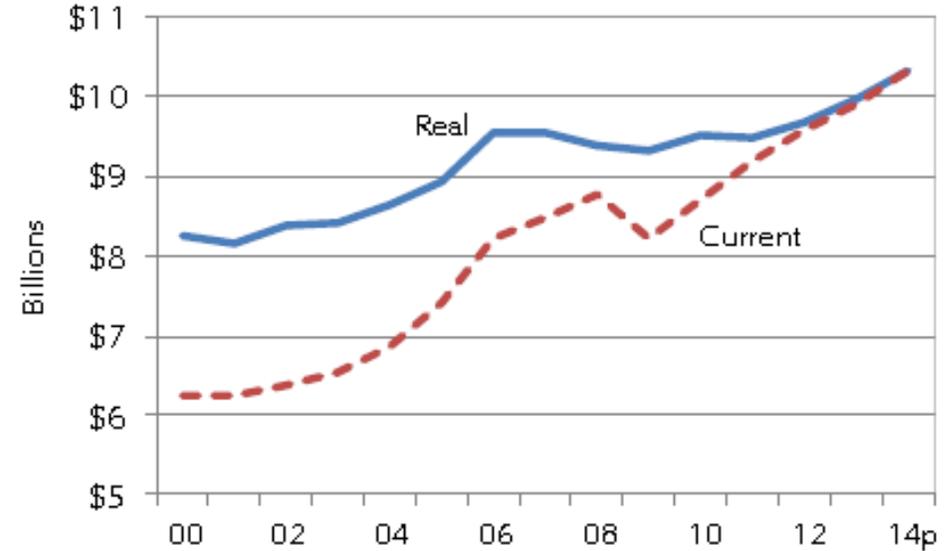
Tourism Promotion and Economic Development

Tourism & Travel Spending Rising in the Northwest

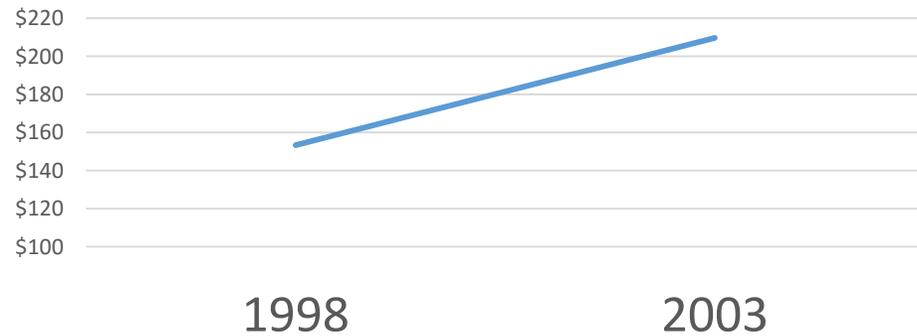
Travel Spending in Washington State
Real and Current Dollars



Oregon Direct Travel Spending
Real and Current Dollars

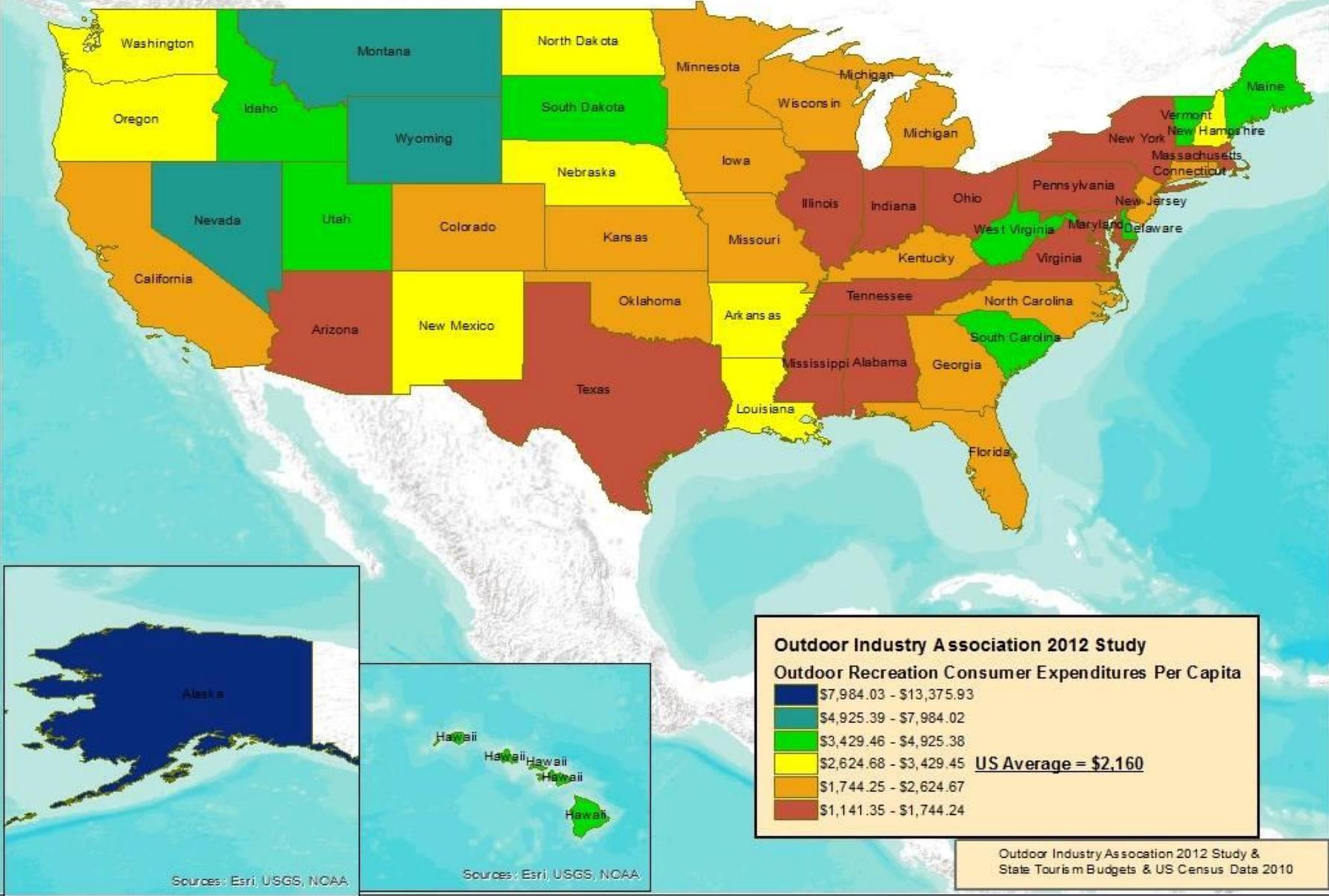


Tourism Spending in the Olympia Area (millions)



*Tourism is on the rise in the region

*Expenditures by visitors and residents combined divided by state population



*State Tourism budget divided by state population

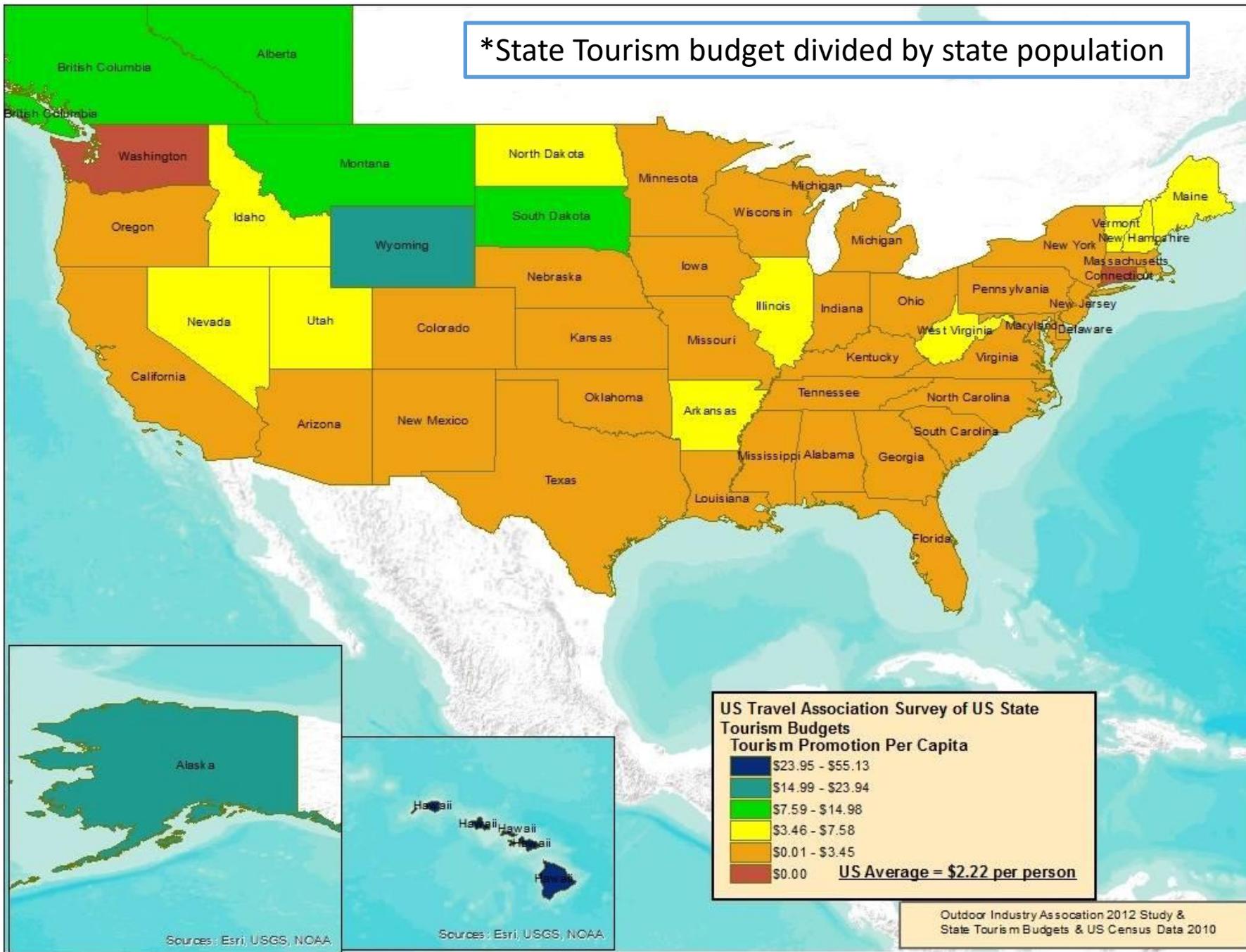


Figure 13. Total Outdoor Recreation Expenditures by Legislative District

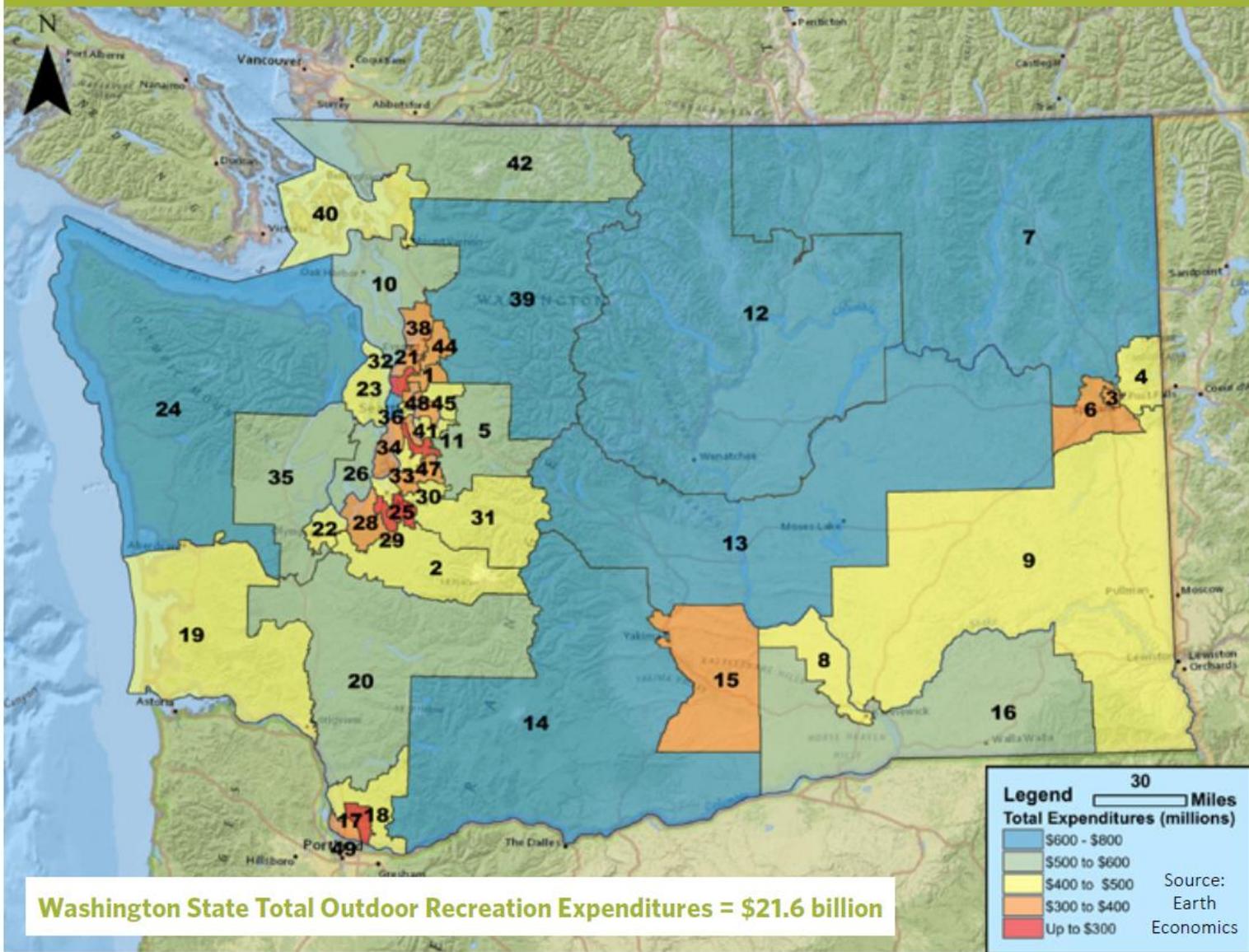
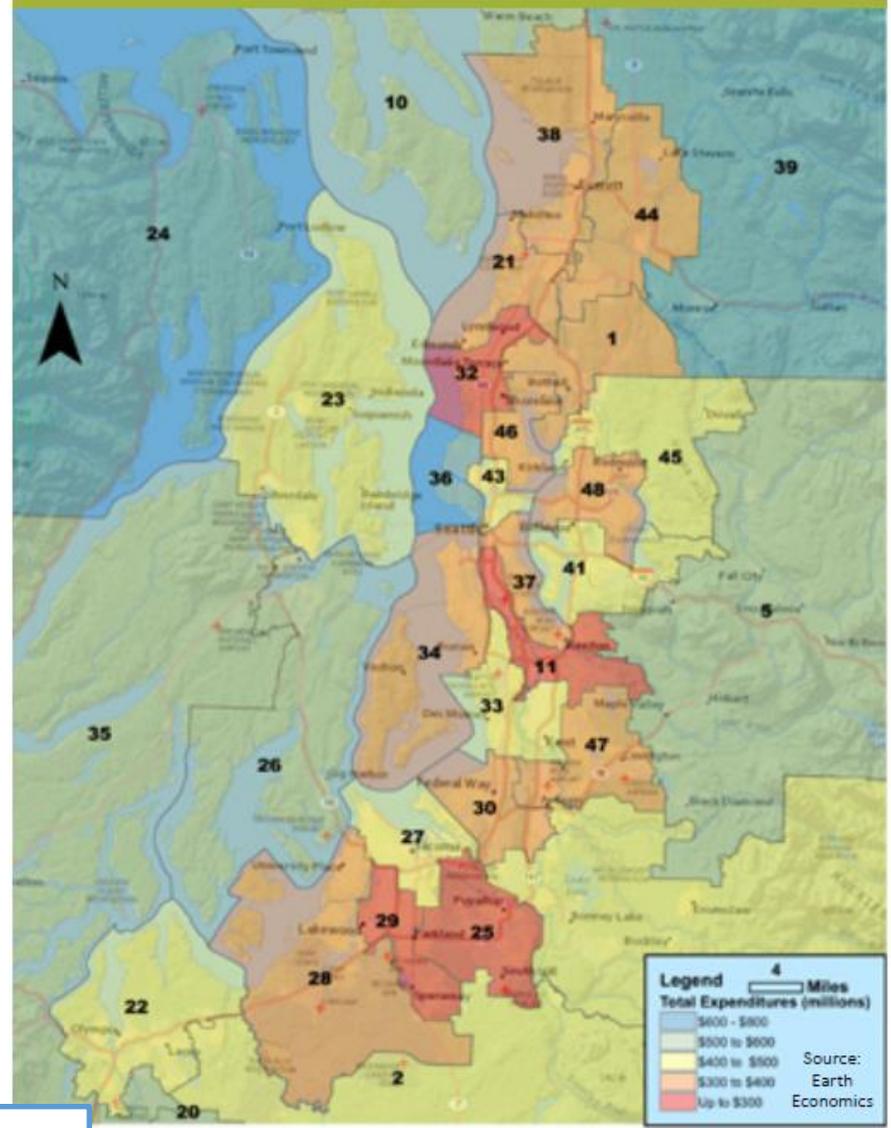


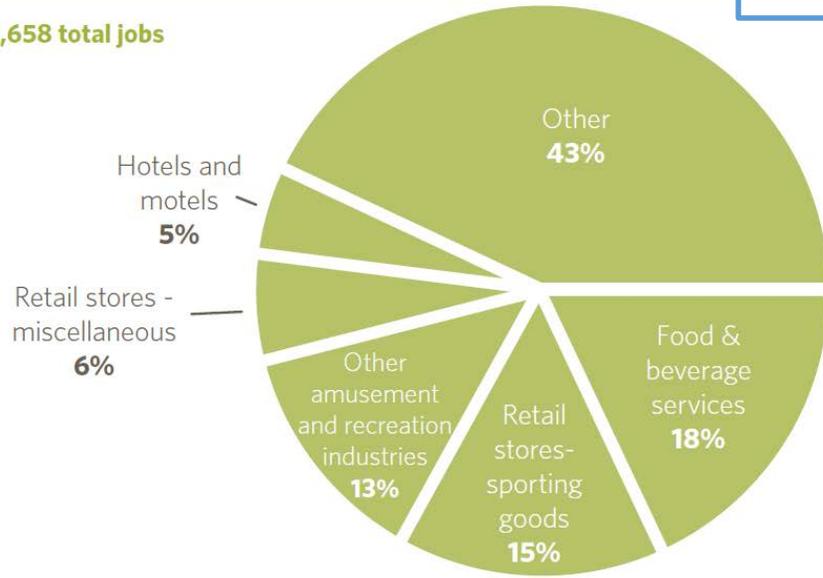
Figure 14. Total Outdoor Recreation Expenditures by Legislative District, Puget Sound Inset



*The Puget Sound is an outdoor recreation asset for a majority of state districts

Figure 2. Employment Supported By Outdoor Recreation by Sector

198,658 total jobs



*Public waters is the highest category by far for expenditures; 200,000 jobs state wide for outdoor recreation in diverse sectors; the highest spending activities would all be attracted by an estuary

- Out-of-state visitors accounted for an estimated 12% of participant days and 27% of total outdoor recreation spending, not including equipment purchases.
- Every dollar spent by an out-of-state traveler in Washington generates \$1.36 in economic impacts.
- Visitors to National Park Service lands accounted for 48% of out-of-state participant days and 77% of total National Park Service related expenditures.
- Impact analysis highlights the importance of promoting outdoor recreation in Washington beyond state borders.

Figure 6. Participant Days and Expenditures for All Lands

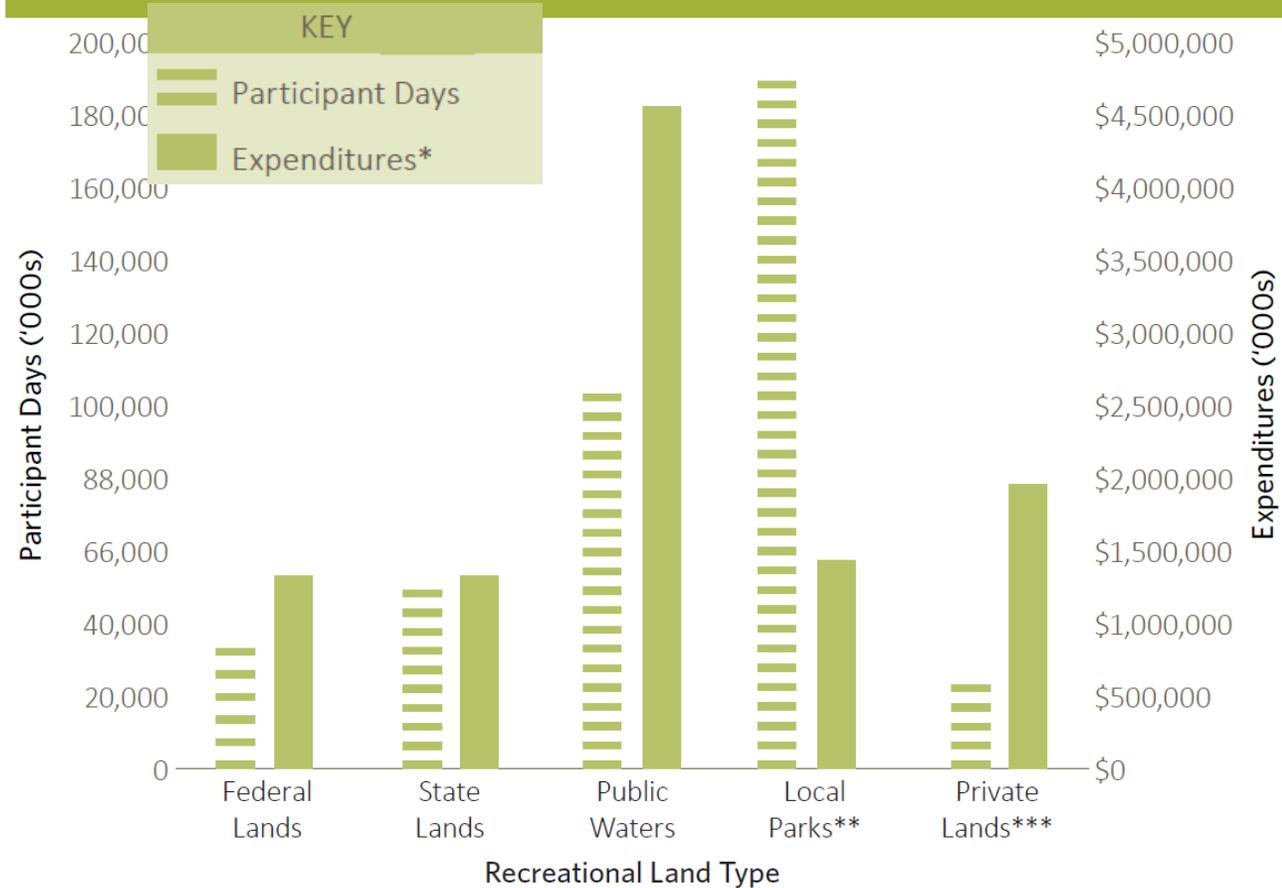


Figure 10. Top Five Recreational Activities by Total Expenditures

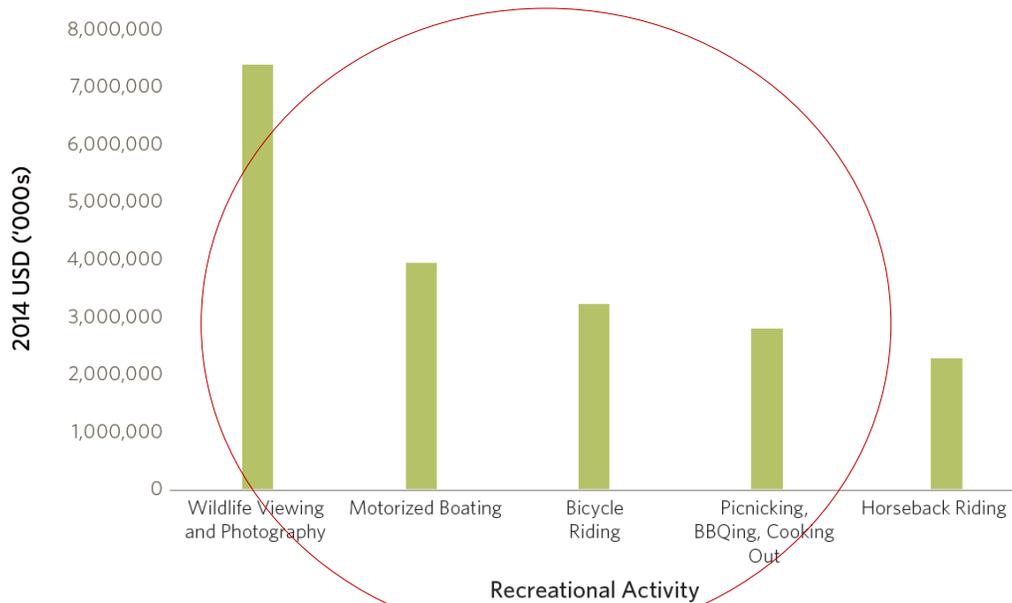
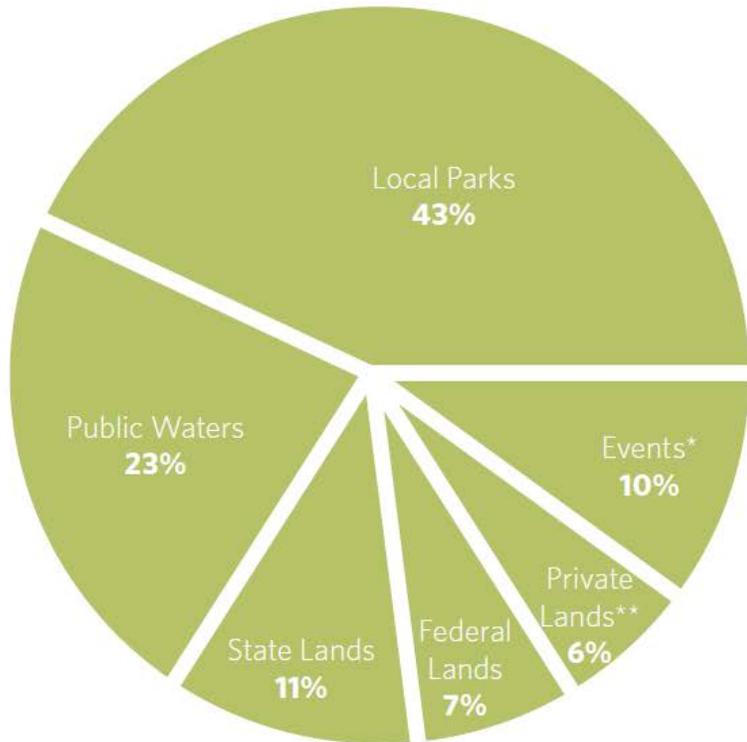


Figure 7. Participant Days on all Recreational Land Types, Including Events on Public Lands

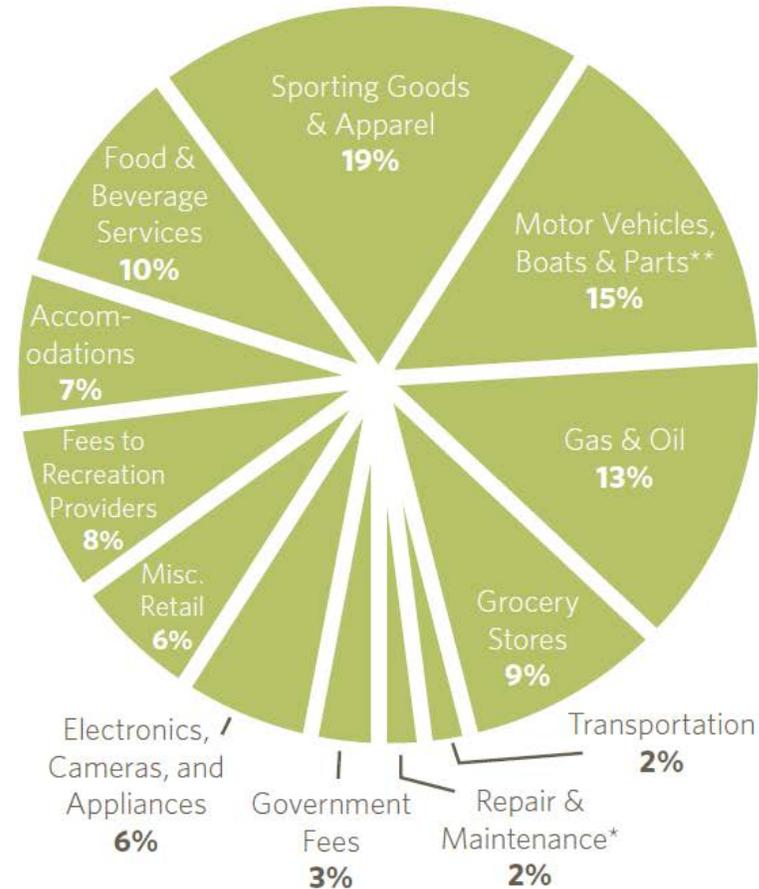
446,027,000 total participant days



*Events occurring on all public land types
 **A limited number of private lands were included in this analysis

Figure 8. Expenditure Categories for All Recreational Land Types

\$21,635,335,000 recreation related expenditures across all land types



*Public Waters, Events, and Local Parks comprise 76% of our outdoor recreation time; spending is distributed among many sectors

Table 7. Participant Days and Expenditures by Public Land Type

Land Type	Participant Days ('000s)	Expenditures** ('000s, 2014 USD)	Per-Person Per-Day Expenditures (2014 USD)
Total Federal Lands	32,853	\$1,323,545	\$40
National Parks & National Recreational Areas	6,466	\$344,057	\$53
National Forests	12,279	\$535,494	\$44
National Wildlife Refuges	898	\$18,090	\$20
U.S. Army Corps of Engineers	12,748	\$405,772	\$32
BLM	462	\$20,133	\$44
Total State Lands	49,095	\$1,347,192	\$27
State Parks	33,059	\$699,289	\$21
State DNR Lands	10,281	\$448,359	\$44
WDFW Game Management Units	1,755	\$118,945	\$68
WDFW Wildlife Areas	4,000	\$80,600	\$20
Public Waters	101,701	\$4,630,986	\$46
Fishing	19,494	\$805,288	\$41
Motorized Boating & Sailing	19,171	\$1,641,007	\$86
Non-Motorized Paddle Sports	7,669	\$578,669	\$75
Inner tubing or floating	12,753	\$560,219	\$44
Non-Motorized Windsurfing/Surfing	1,399	\$123,153	\$88
Swimming in natural waters	26,624	\$525,818	\$20
Swimming (outdoor pools)	13,498	\$266,591	\$20
Scuba diving	1,094	\$130,242	\$119
Total Local Parks	189,915	\$1,439,096	\$8
County Parks	34,857	\$243,999	\$7
City and Special district Parks	153,371	\$1,073,597	\$7
Municipal Golf	1,687	\$121,500	\$72
Events*	44,516	\$1,439,096	\$45
Total	418,081	\$10,727,131	

* Events occurring on public lands

** Excludes equipment expenditures

*Participation and Spending by Activity Type

Table 17. Out-of-State Visitors and Associated Recreation-Related Expenditures* by Land Type

Land Type	Total Participant Days ('000s)	Expenditures* ('000s, 2014 USD)	Per-Person Per-Day Expenditures (2014 USD)
Federal Lands Total	9,207	\$621,147	\$67
National Parks & National Recreational Areas	3,091	\$263,827	\$85
National Forests	2,487	\$208,730	\$84
National Wildlife Refuges	307	\$13,264	\$43
Corps of Engineers	3,276	\$130,854	\$40
BLM	46	\$4,473	\$97
Washington State Lands Total	6,227	\$369,775	\$59
State Parks	3,769	\$216,007	\$57
State DNR Lands	1,028	\$86,303	\$84
WDFW Game Management Units	70	\$8,713	\$124
WDFW Wildlife Areas	1,360	\$58,752	\$43
Public Waters Total	9,303	\$692,440	\$74
Fishing	1,657	\$244,193	\$147
Motorized Boating & Sailing	1,342	\$154,466	\$115
Non-Motorized Paddle Sports	767	\$77,814	\$101
Inner tubing or floating	1,275	\$75,329	\$59
Non-Motorized Windsurfing/Surfing	140	\$16,560	\$118
Swimming in natural waters	2,662	\$70,713	\$27
Swimming (outdoor pools)	1,350	\$35,851	\$27
Scuba diving	109	\$17,514	\$160
Local Parks Total	18,992	\$157,028	\$8
County Parks	3,486	\$24,400	\$7
City and Special District Parks	15,337	\$107,360	\$7
Municipal Golf	169	\$25,269	\$150
Events**	8,903	\$1,173,180	\$132
Private Lands Total***	3,102	\$427,589	\$138
Private Timberland Recreation	827	\$84,228	\$102
Skiing	176	\$72,457	\$411
Private Golf	836	\$125,136	\$150
Horseback Riding	1,263	\$145,768	\$115
Grand Total	55,734	\$3,441,158	

*Excludes equipment expenditures

**Events occurring on public lands

***A limited number of private lands were included in this analysis

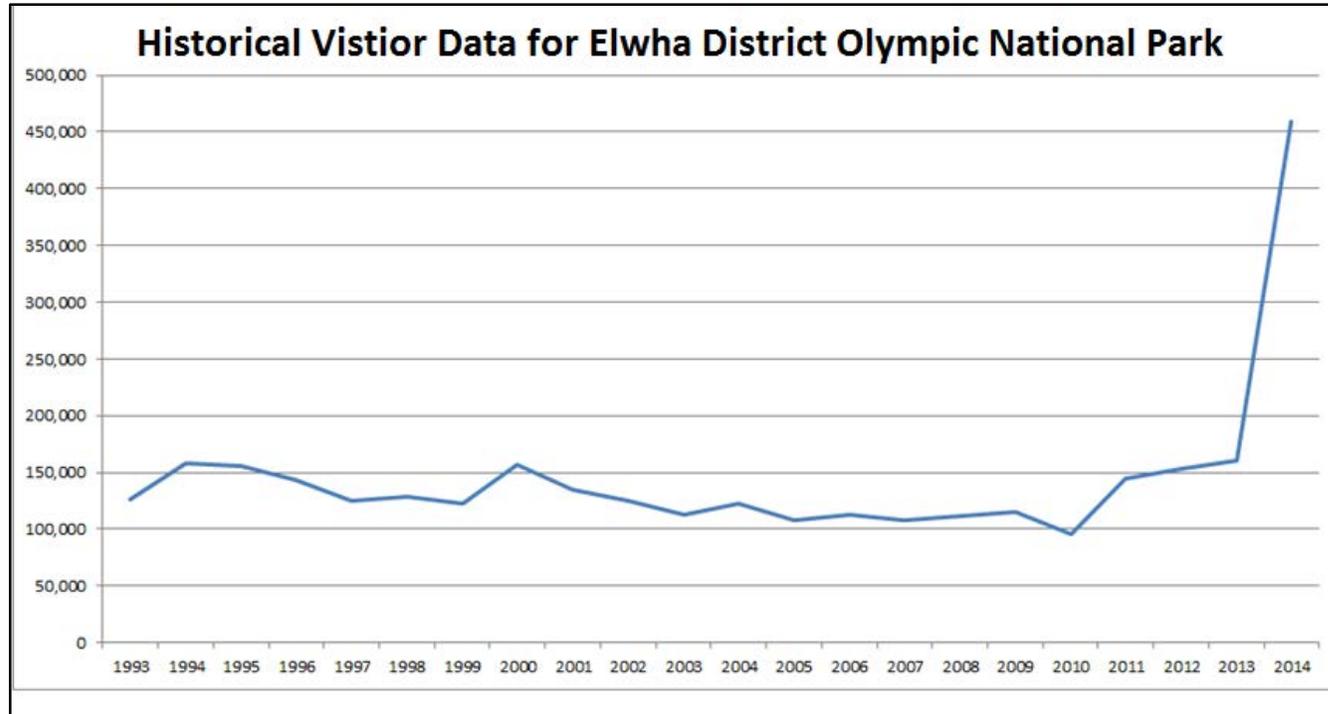
Table 27. Consumer Surplus of Outdoor Recreation on Public Recreational Land Types in Washington State

	Participant Days* ('000s)	Consumer Surplus per day (2014 USD)	Consumer Surplus per year ('000s, 2014 USD)
Federal Lands Total	32,853		\$1,809,691
National Parks & National Recreation Areas	6,466	\$44	\$287,444
National Forests	12,279	\$53	\$645,631
National Wildlife Refuges	898	\$43	\$38,890
Corps of Engineers	12,748	\$64	\$813,452
Bureau of Land Management	462	\$53	\$24,274
Washington State Lands Total	49,095		\$1,872,298
State Parks	33,059	\$38	\$1,243,189
State DNR Lands	10,281	\$26	\$266,740
WDFW Game Management Units	1,755	\$61	\$107,131
WDFW Wildlife Areas	4,000	\$64	\$255,239
Public Waters	88,203		\$3,880,613
Fishing	19,494	\$66	\$1,293,072
Motorized Boating & Sailing	19,171	\$26	\$498,135
Non-Motorized Paddle Sports	7,669	\$38	\$292,731
Inner tubing or floating	12,753	\$50	\$641,694
Non-Motorized Windsurfing/Surfing	1,399	\$50	\$70,419
Swimming in natural waters	26,624	\$38	\$1,008,316
Scuba diving	1,094	\$70	\$76,246
Local Lands	188,228		\$12,010,768
County Parks	34,857	\$64	\$2,224,216
City Parks and Special Districts	153,371	\$64	\$9,786,552
Grand Total	358,379		\$19,573,370

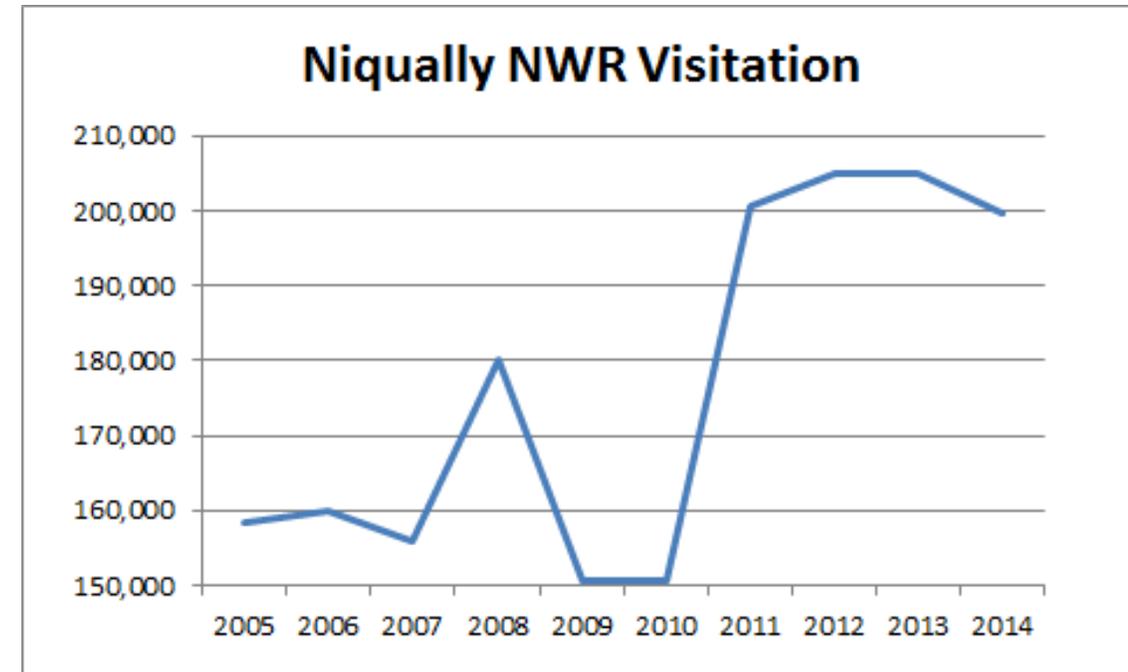
* Note that events and private lands were not included in this analysis, so the total number of participant days in this table differs from previous tables.

***Public Waters attract more out of state visitor spending than all Federal Lands (National Parks, Forests, Wildlife Refuges Corps of Engineers and BLM lands)! Fishing alone attracts nearly as much spending as all the national parks**

Restoration Effect on Visitation



- Elwha Visitation increased 300% with 300,000 new visitors
- Average \$53.21 per day expenditures would yield roughly \$16.0 million in increased consumer expenditures per year



- Nisqually NWR visitation increased 25% above
- Average \$20 per day expenditures would yield \$800,000 increased expenditures per year

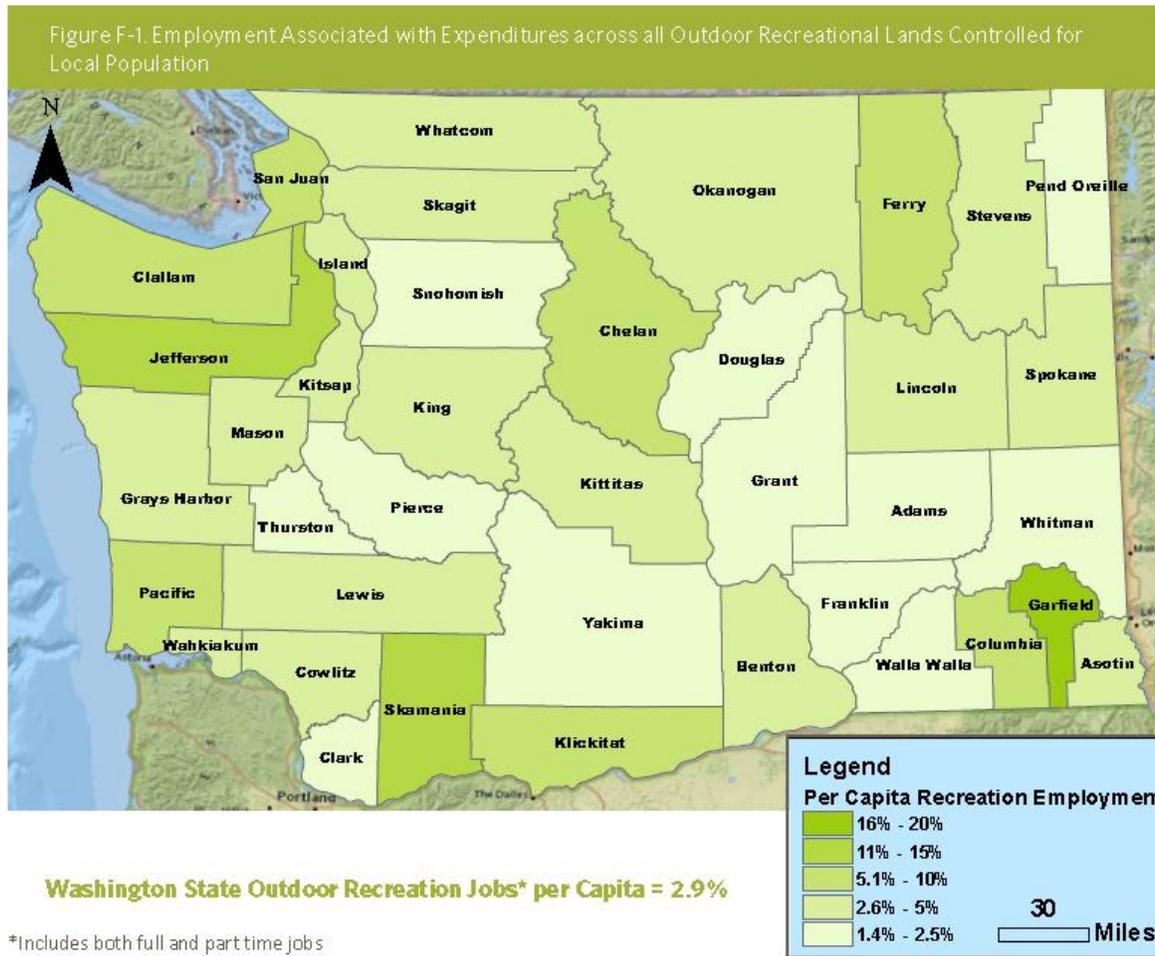
***Estuaries attract visitors perhaps because they are rare and provide continual, seasonal, and tidal visual transformation-this attracts visitors**

*The Thurston County outdoor recreation economy produces more economic activity than the Port of Olympia

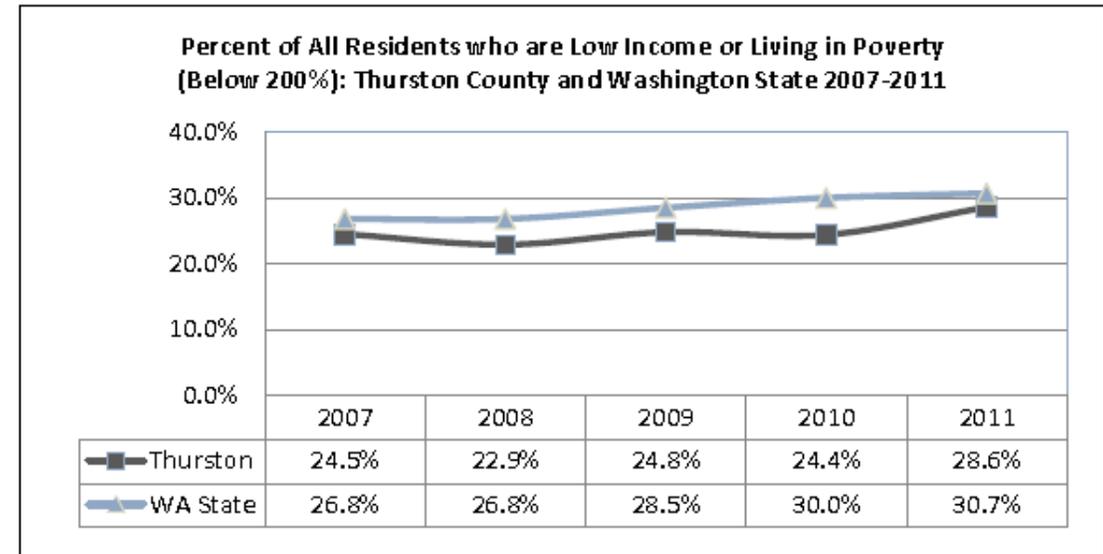
County Level

Tourism Promotion and Economic Development

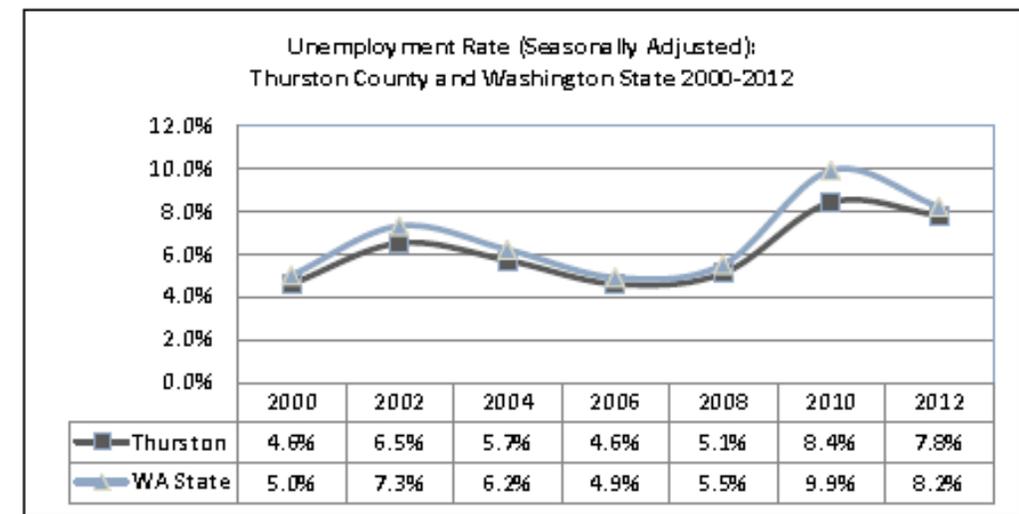
Jobs: Tourism, Visitors, and Outdoor Recreation



*Thurston County employment and poverty closely track to the state, but it has a relatively weak tourism economy compared to other areas

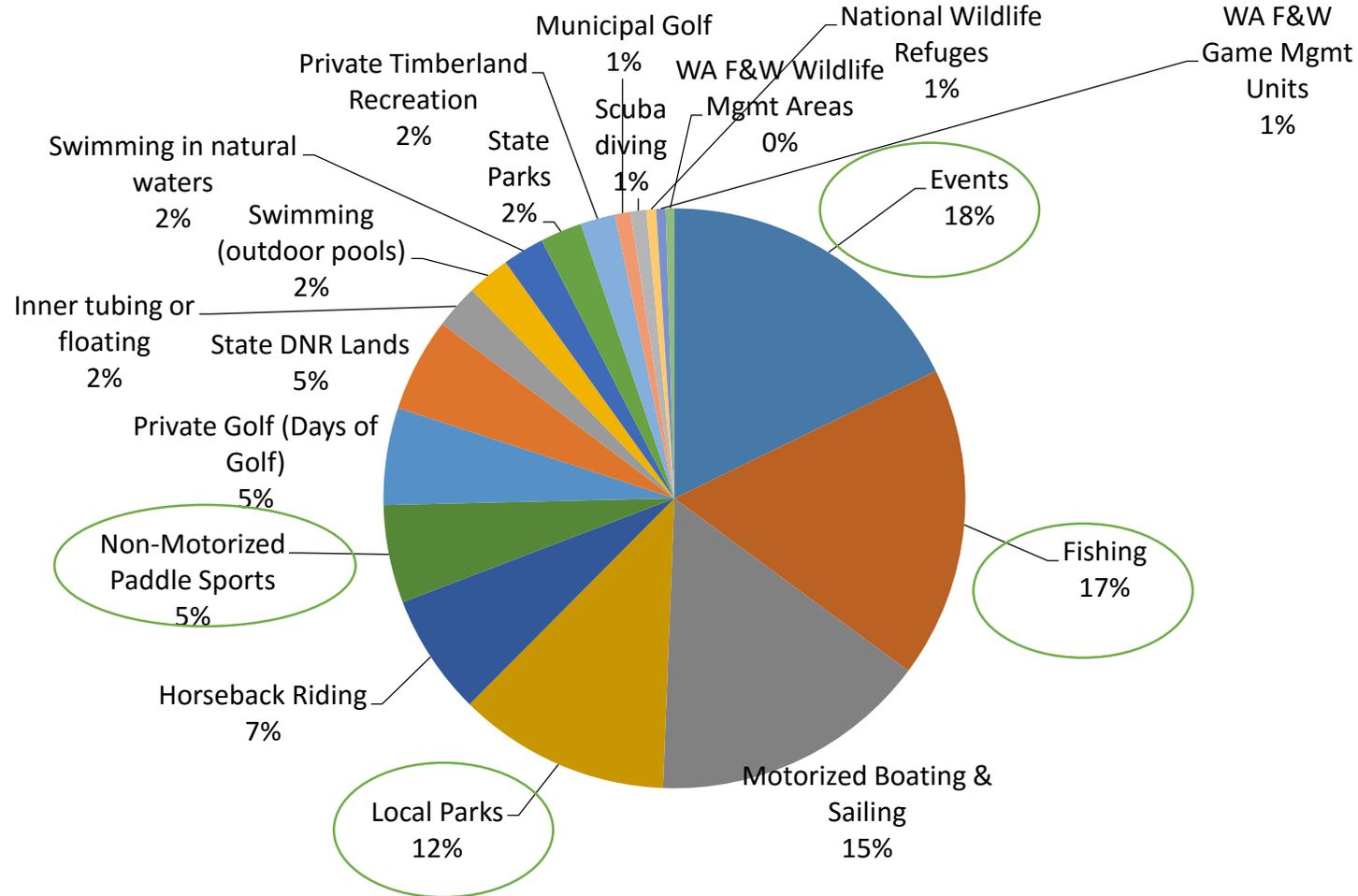


MEASURE: Percent of county residents in the labor force who are unemployed.



Data Source: Local Area Unemployment Statistics (10)

How much do different outdoor recreation activities in Thurston County generate in spending per year?



*Estimated outdoor recreation related expenditures of both residents and visitors equals \$755 Billion/year; overnight visitor spending is estimated at \$209.7 million in 2003

Table F-1. Economic Contribution Results, By County (continued)

County	Total Expenditures* (000's)	Economic Contribution (000's)	Multiplier	Employment	State and Local Tax (000's)
PEND OREILLE	\$68,066	\$19,736	0.29	250	\$2,829
PIERCE	\$2,252,445	\$1,612,372	0.72	17,243	\$176,352
SAN JUAN	\$121,776	\$94,363	0.77	1,134	\$10,557
SKAGIT	\$479,877	\$349,972	0.73	3,805	\$38,281
SKAMANIA	\$199,386	\$120,784	0.61	1,481	\$15,873
SNOHOMISH	\$2,073,726	\$1,225,092	0.59	14,926	\$150,405
SPOKANE	\$1,308,264	\$1,177,345	0.90	12,460	\$118,766
STEVENS	\$235,766	\$125,812	0.53	1,719	\$18,133
THURSTON	\$755,537	\$476,050	0.63	5,616	\$58,735
WAHKIAKUM	\$20,717	\$6,710	0.32	111	\$1,057
WALLA WALLA	\$159,949	\$94,593	0.59	1,133	\$11,504
WHATCOM	\$705,093	\$584,754	0.83	6,502	\$62,712
WHITMAN	\$146,083	\$67,389	0.46	926	\$9,417
YAKIMA	\$669,931	\$433,425	0.65	5,398	\$55,037
Washington**	\$21,635,336	\$20,520,858	0.95	198,658	\$2,010,992

*Includes equipment expenditures

**Counties do not total to Washington State due to region-specific modeling

Comparative Changes over the last five years: 2014 to 2009

	2014 TOTAL	2009 TOTAL	TOTAL CHANGE
PORT OF OLYMPIA			
JOBS			
DIRECT	2,400	3,043	-643
INDUCED	1,168	1,390	-222
INDIRECT	<u>830</u>	<u>2,816</u>	<u>-1,986</u>
TOTAL	4,397	7,249	-2,852
PERSONAL INCOME (MILLIONS)			
DIRECT	\$106.1	\$112.5	-\$6.4
RE-SPENDING/LOCAL CONSUMPTION	\$96.0	\$94.5	\$1.5
INDIRECT	<u>\$34.0</u>	<u>\$143.7</u>	<u>-\$109.7</u>
TOTAL	\$236.1	\$350.7	-\$114.6
BUSINESS REVENUE (MILLIONS)	\$287.7	\$1,062.2	-\$774.5
LOCAL PURCHASES (MILLIONS)	\$90.3	\$439.7	-\$349.4
STATE/LOCAL TAXES (MILLIONS)	\$22.2	\$31.2	-\$9.0

***Outdoor Recreation in Thurston County has an economic contribution twice that of the Port of Olympia**

***Outdoor Recreation stimulates more employment than the Port of Olympia**

***Outdoor Recreation stimulates almost three (3x) times as much in tax collections**

*The lowest wages in the county are in tourism dependent sectors (accommodation, food services, and retail); those sectors are top employment sectors for the outdoor recreation economy

Covered Employment Wages by Industry (2002 to 2014)

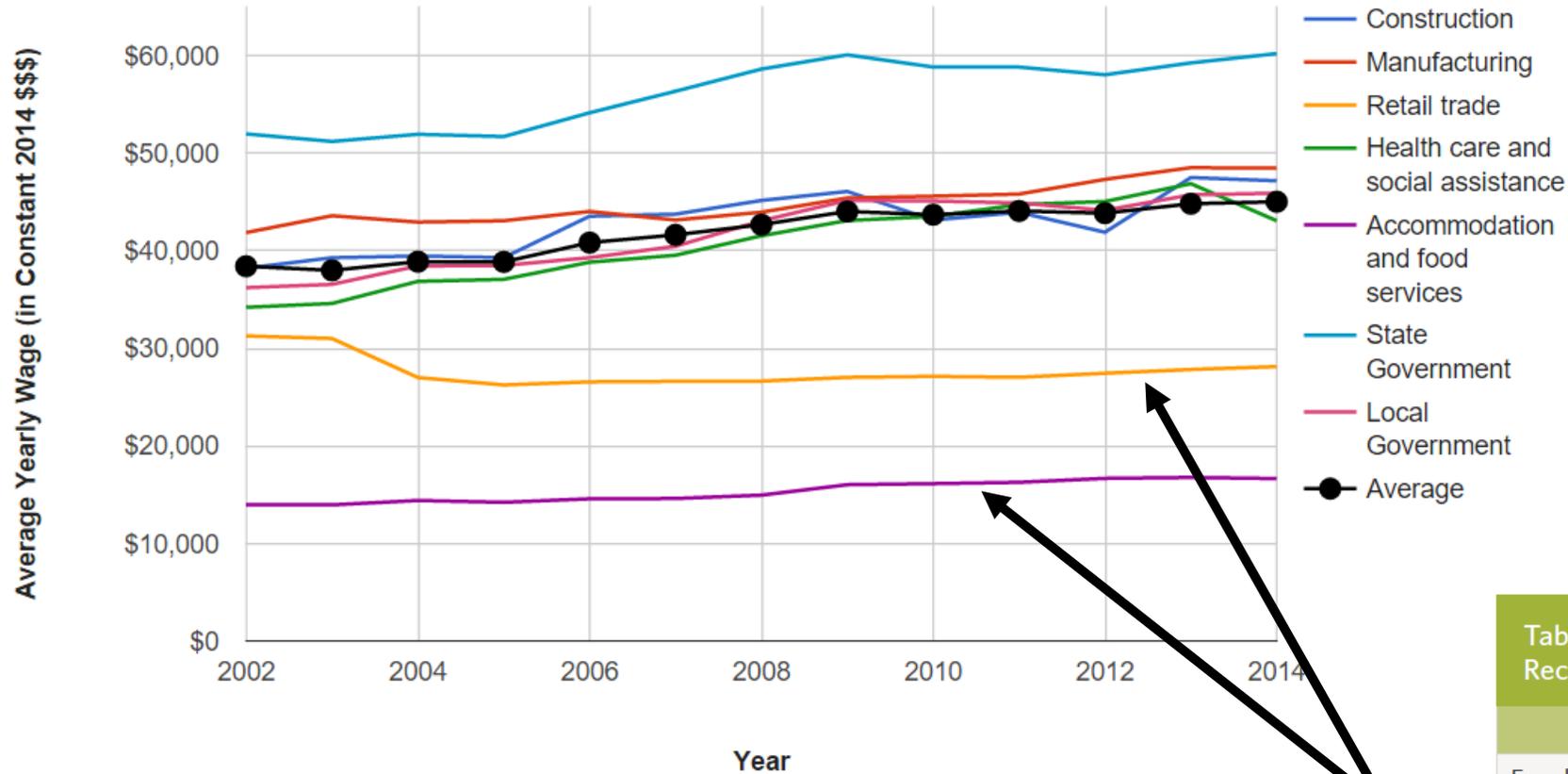
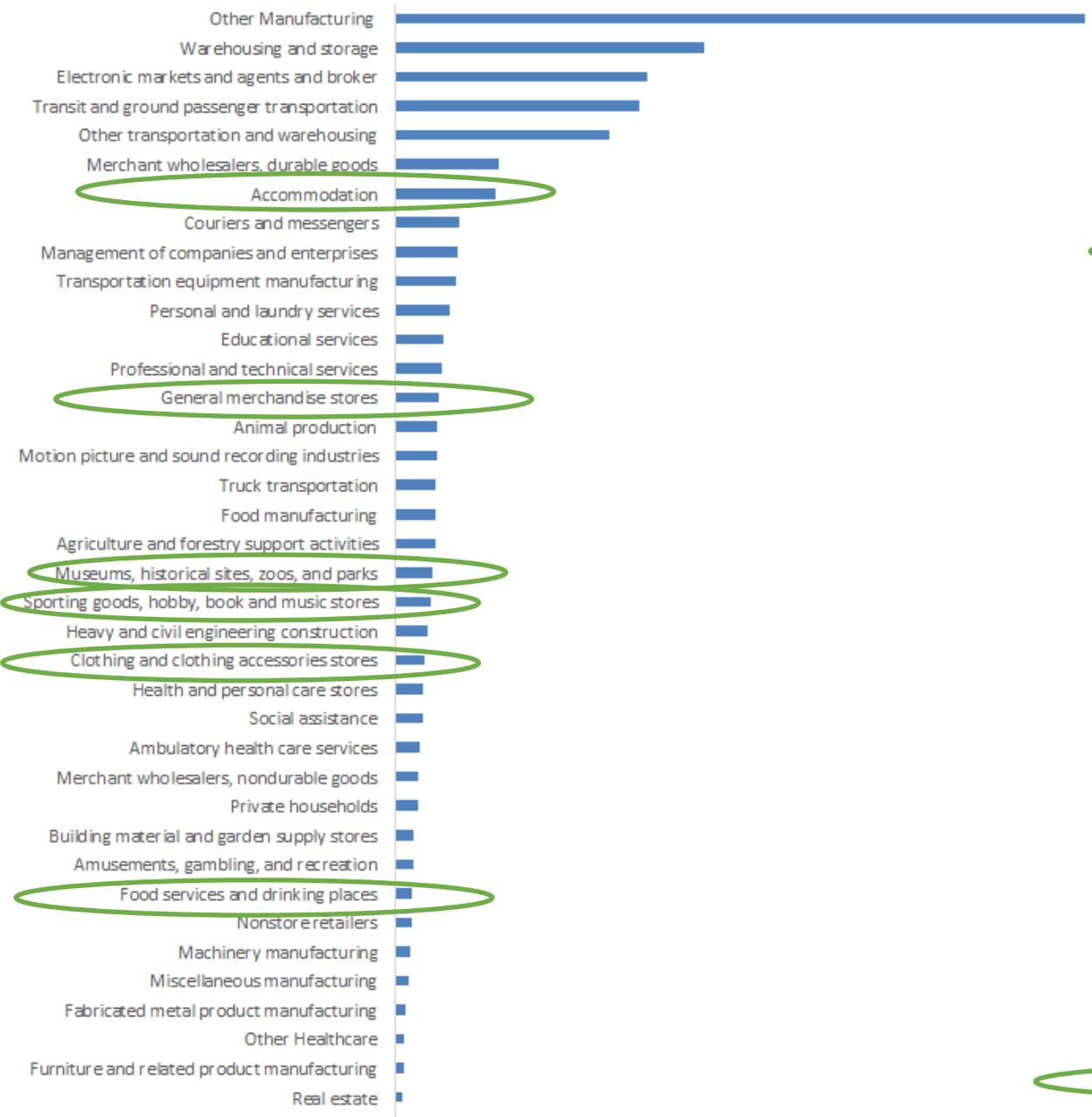


Table 5. Employment Associated with Outdoor Recreation, by Sector

Sector	Employment
Food and beverage places	36,047
Retail Stores - Sporting goods, etc.	30,190
Other amusement and recreation industries	25,170
Retail Stores – Miscellaneous	12,000
Hotels and motels	10,046

*Sectors benefiting from outdoor recreation are top elements of our county economy, but not experiencing growth

2002-2013 Growth in Jobs Number by Industry



2013 Jobs in Thurston County by Sector



*Olympia is one of the worst performing tourism economies in the Pacific Northwest; despite having a strong winter season (legislature/colleges)

City Level

Tourism Promotion and Economic Development



Pearl Point Park, Olympia, Wash.

EVERGREEN

OLYMPIA ARTESIAN WELL

OLYMPIA, WA
All the elements of a thriving tourist destination await the estuary...

Olympia: Perfect Location to Capture Tourism

Scoring of Corridors in the Cascadia Megaregion



Source: America 2050

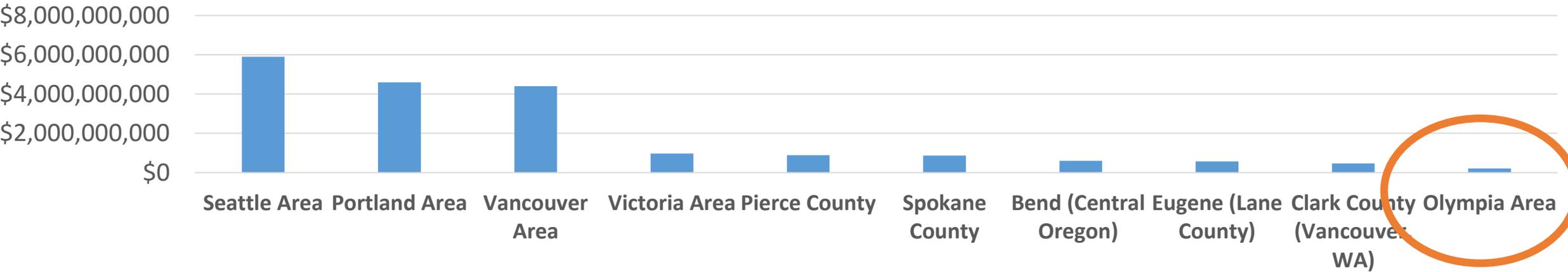
TABLE 60
Scoring of Corridors in the Cascadia Megaregion

Origin	Destinations	Length	Score	Total Employment Within 2 Miles of Major Hubs	Total Population within 25 Miles of Major Hubs	Cumulative Air Market*	Total Transit Accessible Population in Major Hubs
Portland OR	Seattle WA	185	17.37	370,000	5,600,000	470,000	670,000
Eugene OR	Portland OR	124	15.42	190,000	2,900,000	60,000	500,000
Eugene OR	Bellingham WA	403	13.71	446,000	6,900,000	690,000	670,000
Seattle WA	Spokane WA	328	10.00	284,000	3,200,000	530,000	170,000

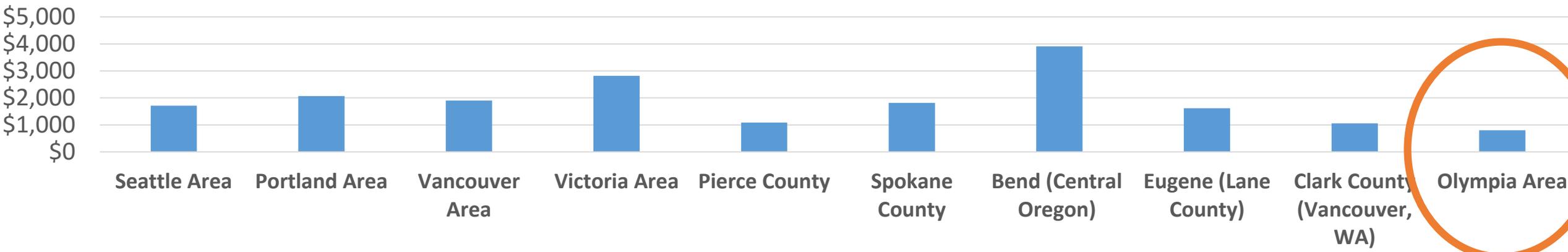
*Includes annual flights among all airports along the corridor.

Olympia Underperforming: Northwest Tourism & Travel Spending

Estimated Total Visitor Spending (Gross)

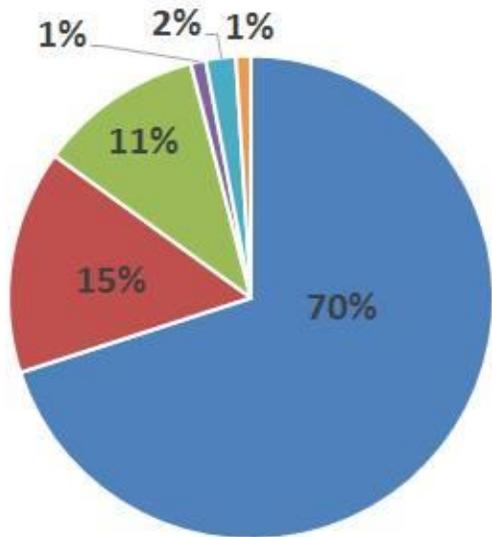


Estimated Per Capita Visitor (relative to destination population)



Values of Olympia Residents Strongly Stated in a Survey

Which of these do you think is most important?



- Doing what is best for water quality, fish, and wildlife
- Keeping the cost to the taxpayers as low as possible
- Maintaining the look of the lake
- None
- Don't Know
- No Answer

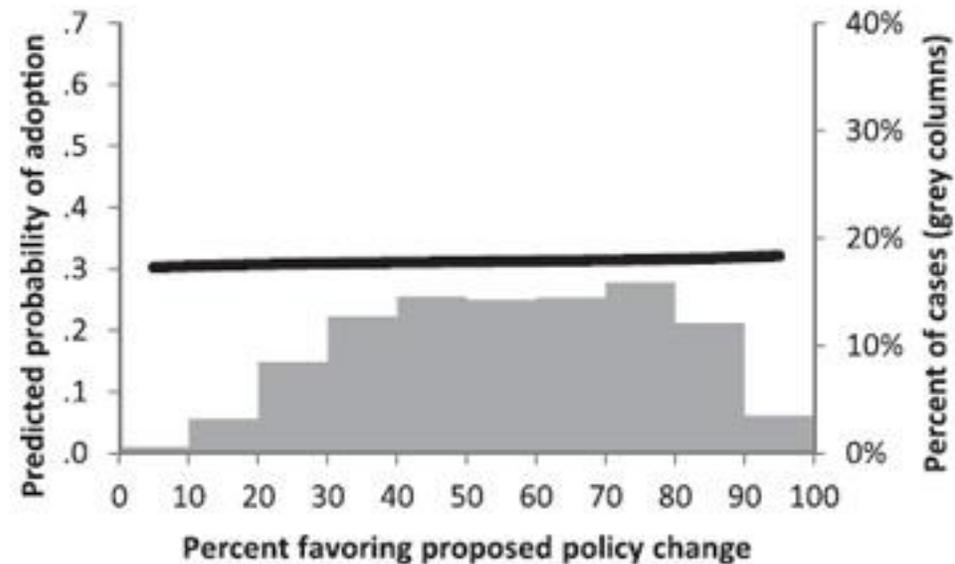
7. You may be aware that studies are underway about the future of Capitol Lake and Budd Inlet. How important are the following factors to you in determining the future of Capitol Lake? What about [READ A - C: ROTATE]? Would you say that should be: extremely important, somewhat important, or not at all important when determining the future of Capitol Lake?

	EXT	SW	NOT	NO OPIN
1. Keeping the cost to the taxpayer as low as possible.....	44	41	16	0
2. Maintaining the look of the lake	36	40	22	1
3. Doing what is best for water quality, fish, and wildlife.....	74	23	3	0

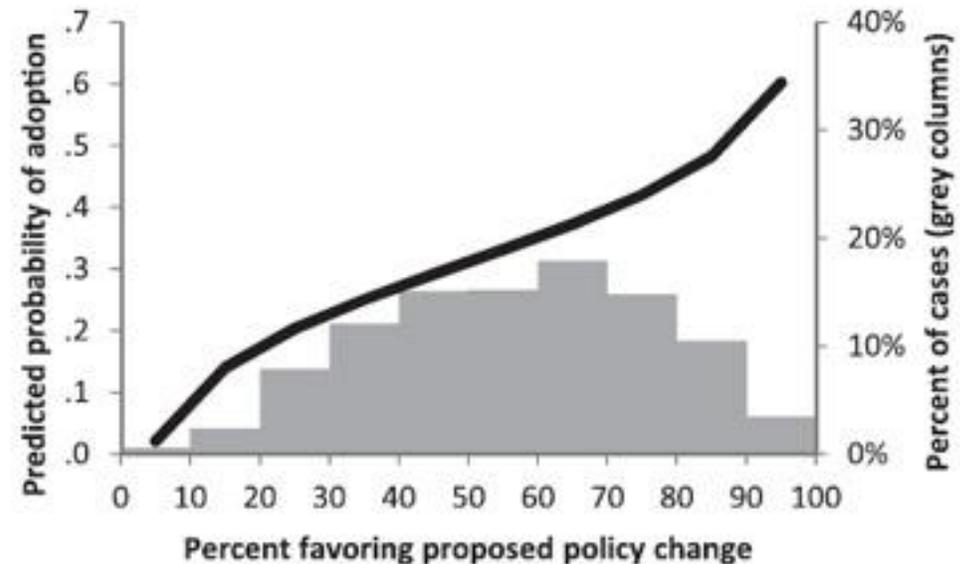
8. Which of these do you think is the most important? RE-READ IF NECESSARY.

- Doing what is best for water quality, fish and wildlife...70
- Keeping the cost to the taxpayer as low as possible ...15
- maintaining the look of the lake...11
- NONE...1
- [DON'T KNOW...2]
- [NO ANSWER...1]

Average citizens' preferences



Economic elites' preferences



"Testing Theories of American Politics" (Gilens, Page)

*Urban estuaries exist all over the world; but estuaries so proximal to downtown areas are rare; uniqueness is an important aspect of attracting visitors from afar

Global Scale

Looking for Comparables and Considering Design

An Estuarine City

- A Capitol Estuary would be unique in the world and the country
- Imagining the Future by looking back and around
- A Model for Rivers, Estuaries, and City Tourism: Charleston, SC



What would the estuary look like?



1934 AERIAL



2010 AERIAL



Mudflats at Nisqually



Olympia, pre-dam

Ash Creek, Connecticut (above and below)

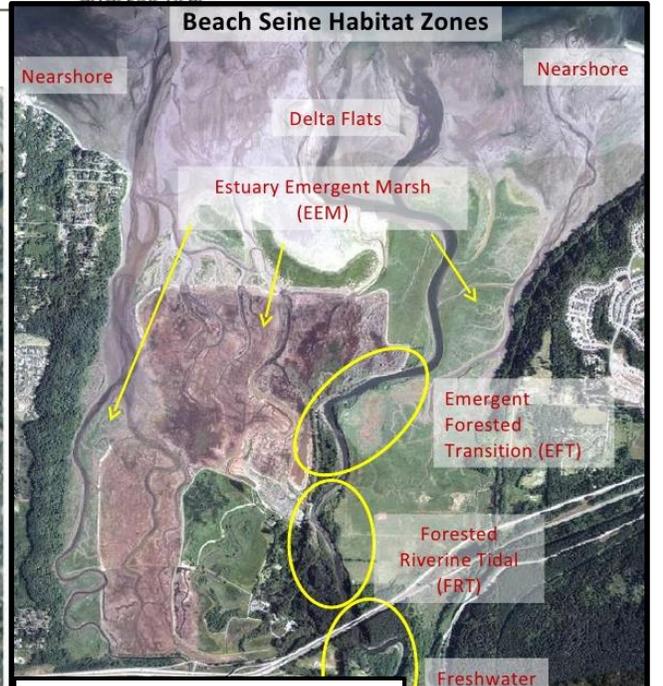


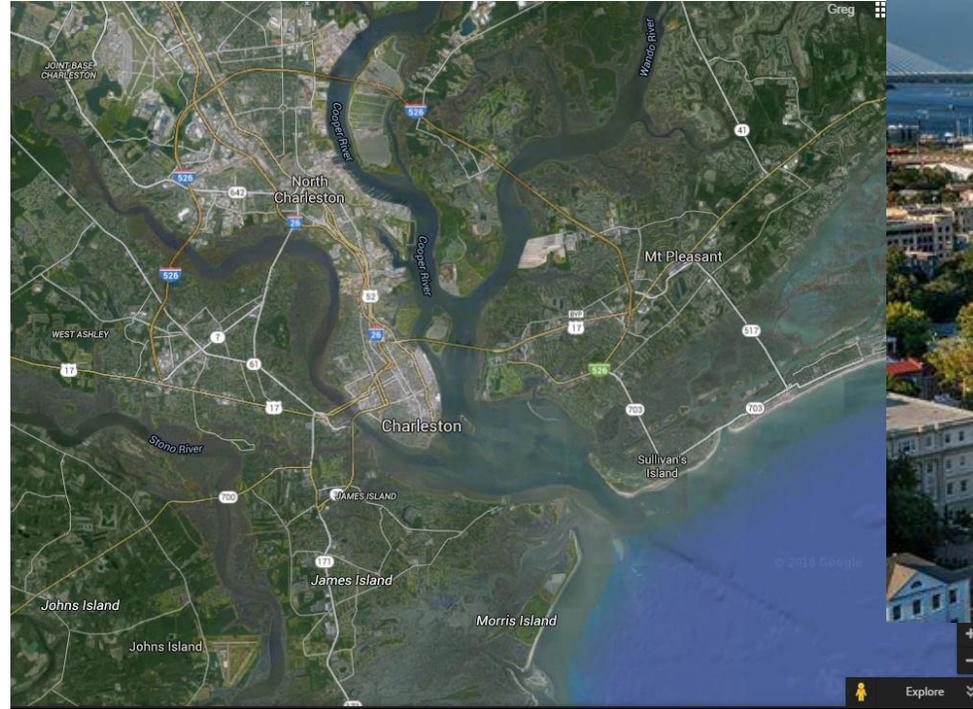
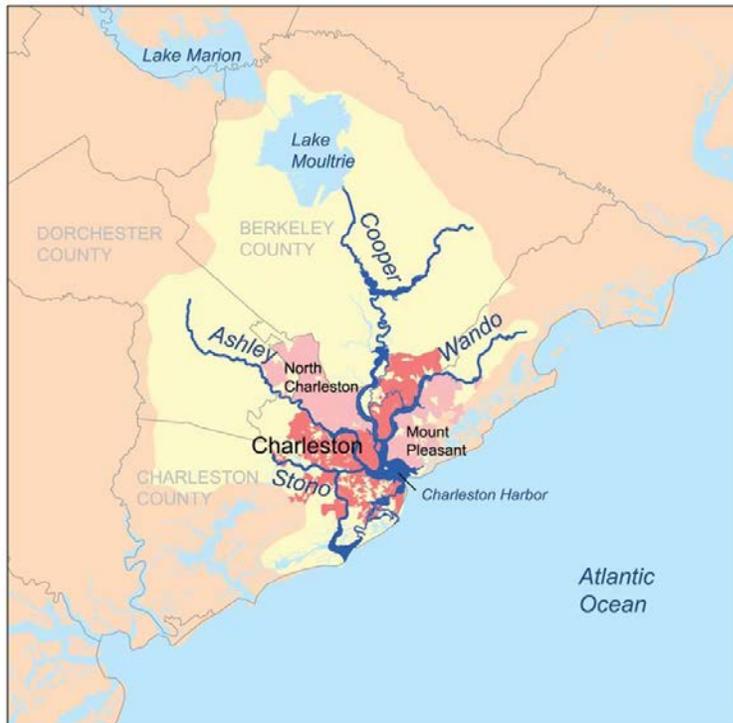
figure 2

DEFS Status Report

Conceptual Vision of the Restored Deschutes Estuary at Low Tide

Background photograph copyright AEROLISTPHOTO.com

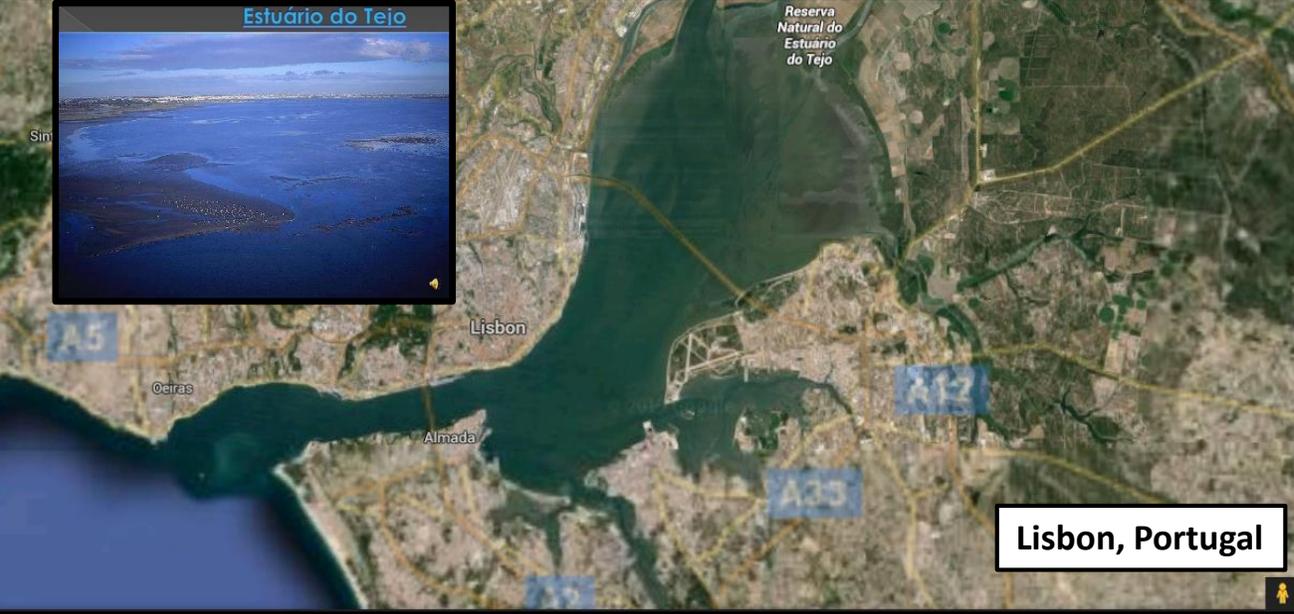




Charleston, SC

- Population 120,000 (=Olympia+Tumwater+Lacey)
- Tourism Economy = \$3 billion
- (14x Olympia Area)

Where else are there urban estuaries?



Lisbon, Portugal



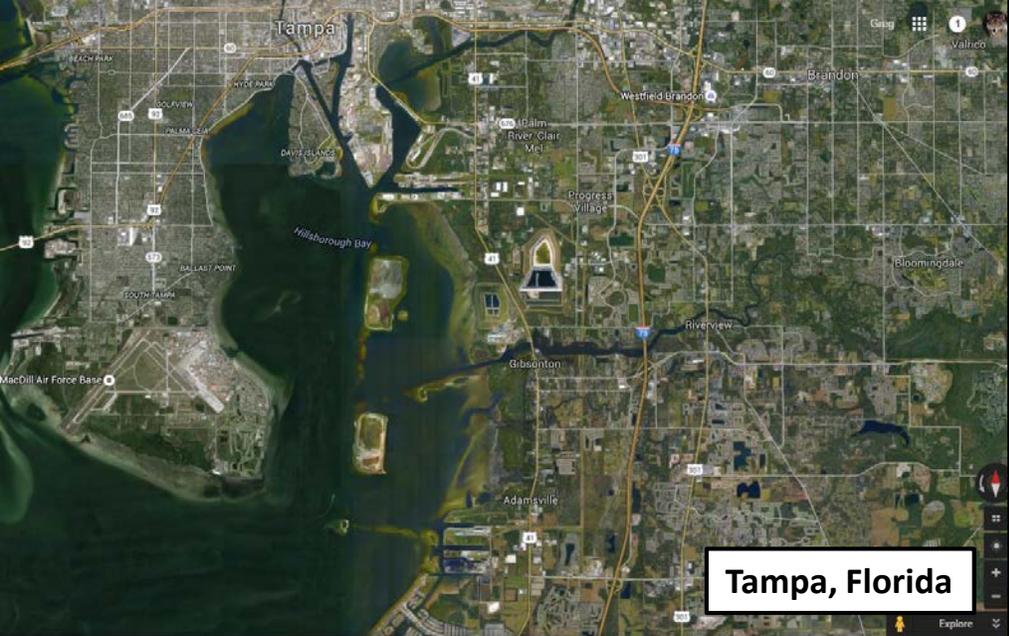
Galway, Ireland



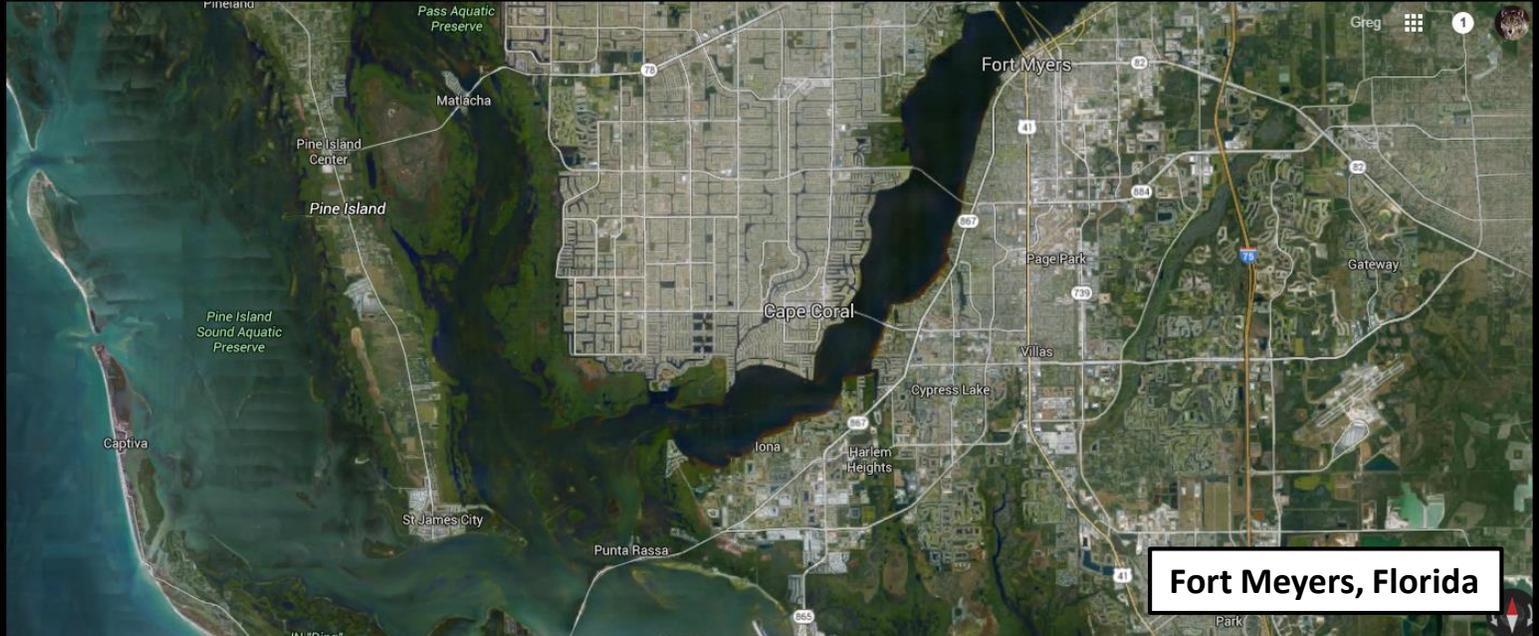
Mazatlan, Mexico



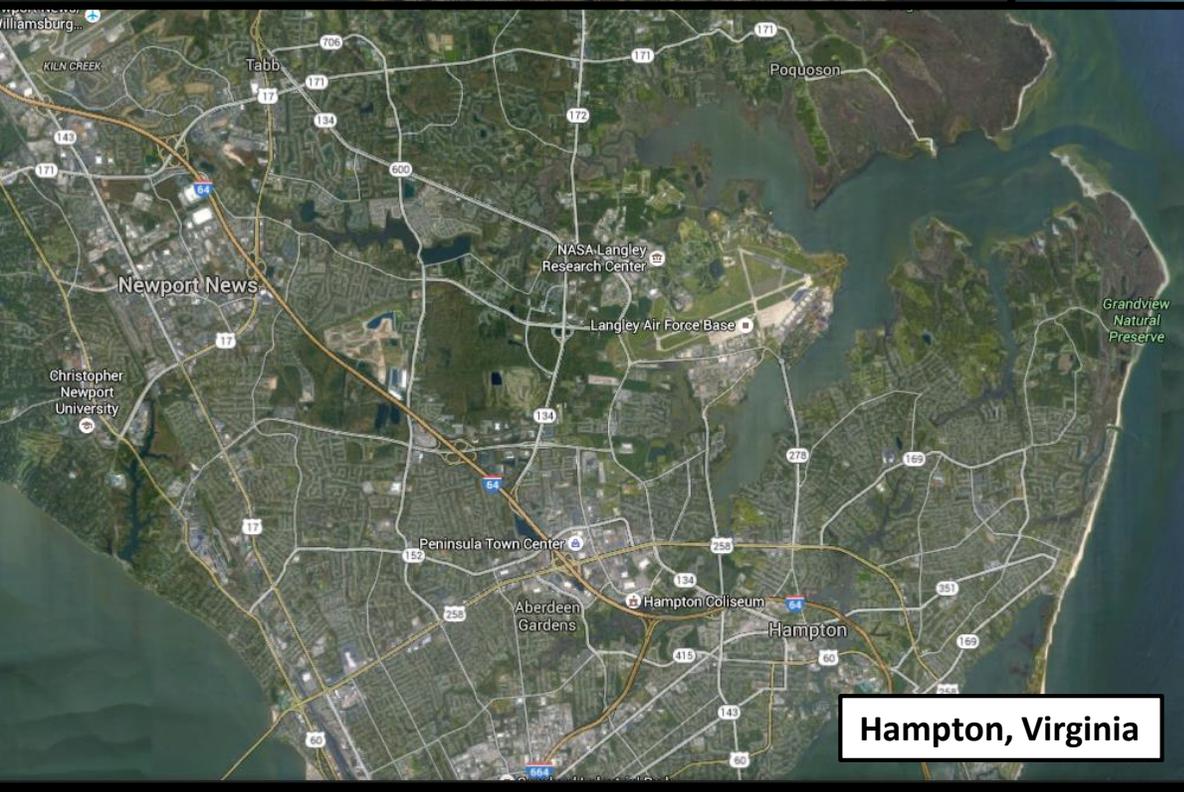
Venice, Italy



Tampa, Florida



Fort Myers, Florida



Hampton, Virginia



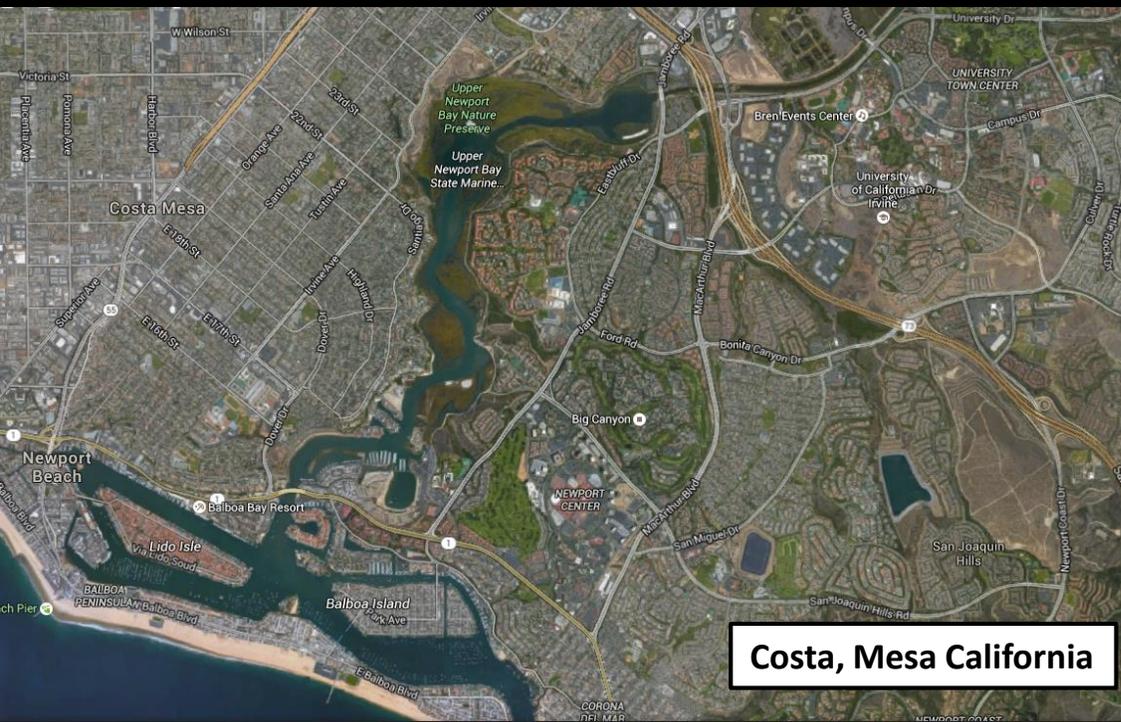
Cowichan, British Columbia



Ventura, California



Seal Beach, California



Costa, Mesa California



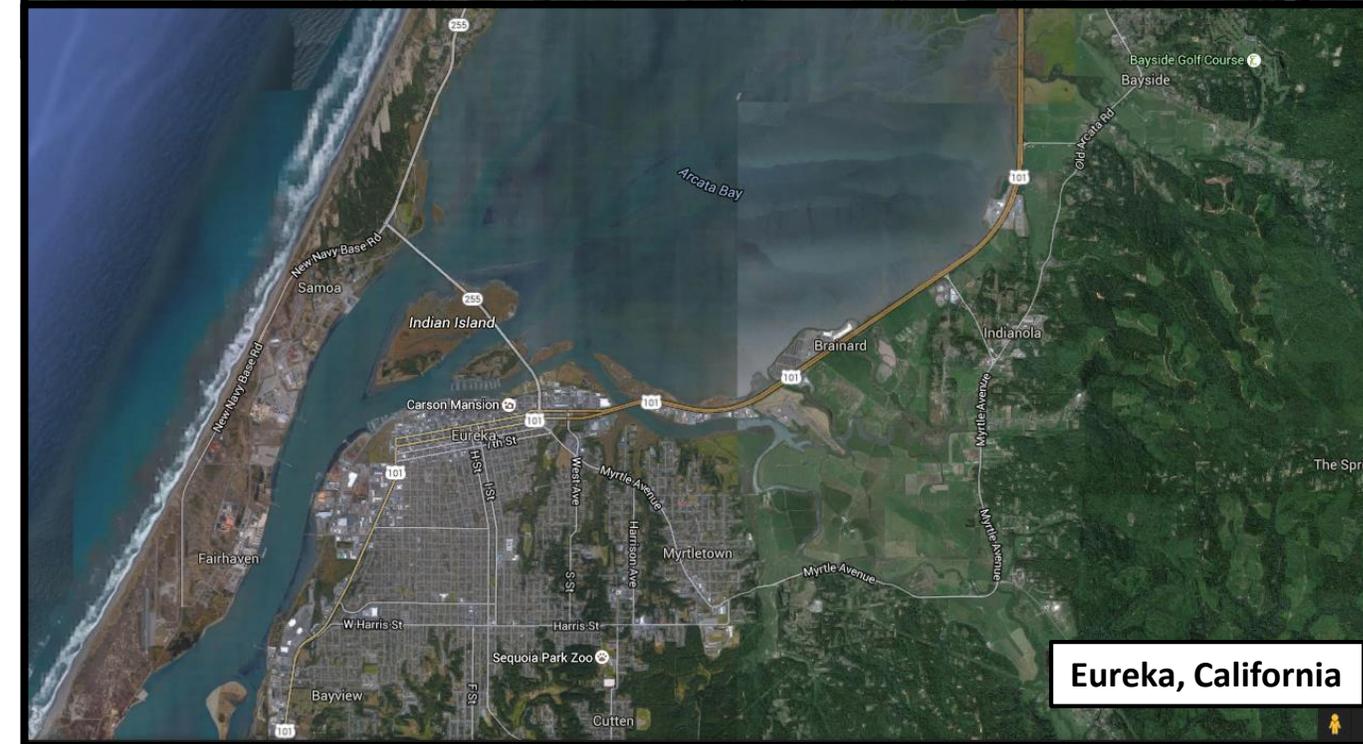
Augusta, Western Australia



Astoria, Oregon



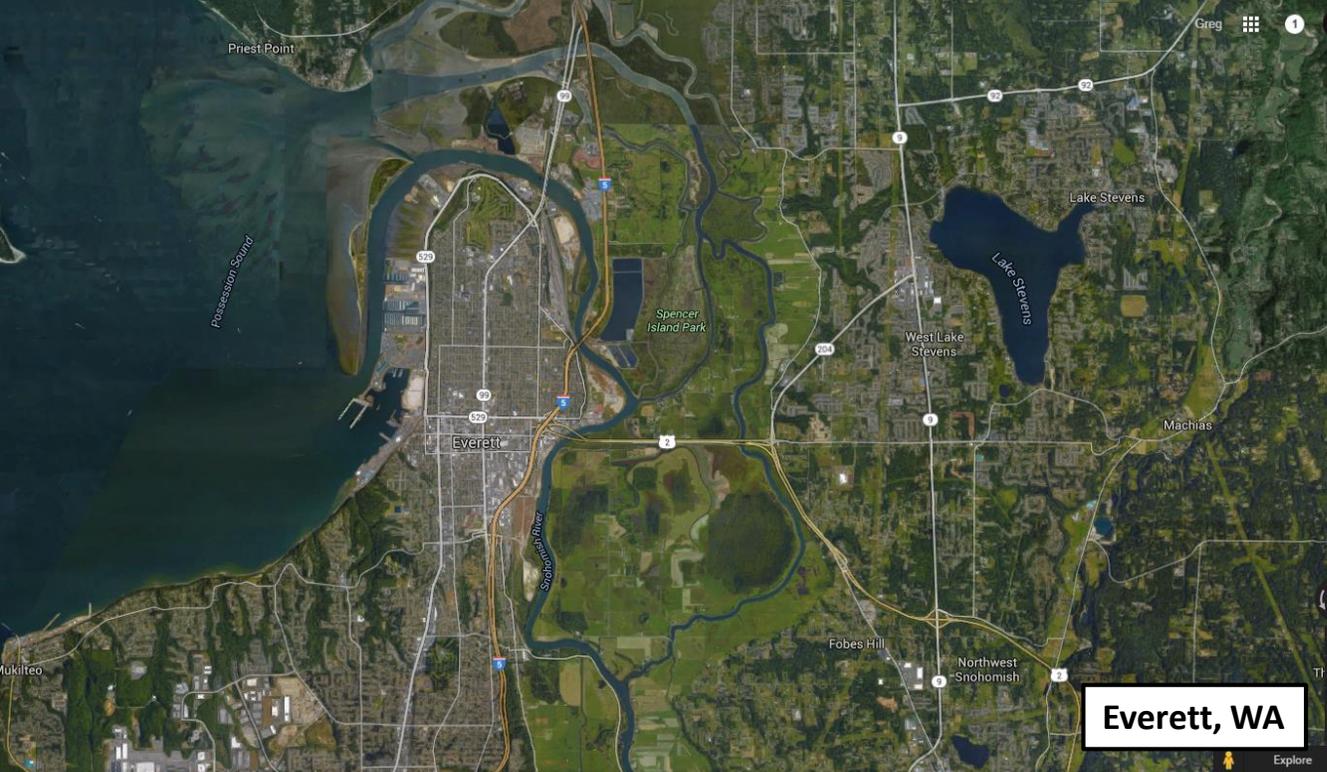
Florence, Oregon



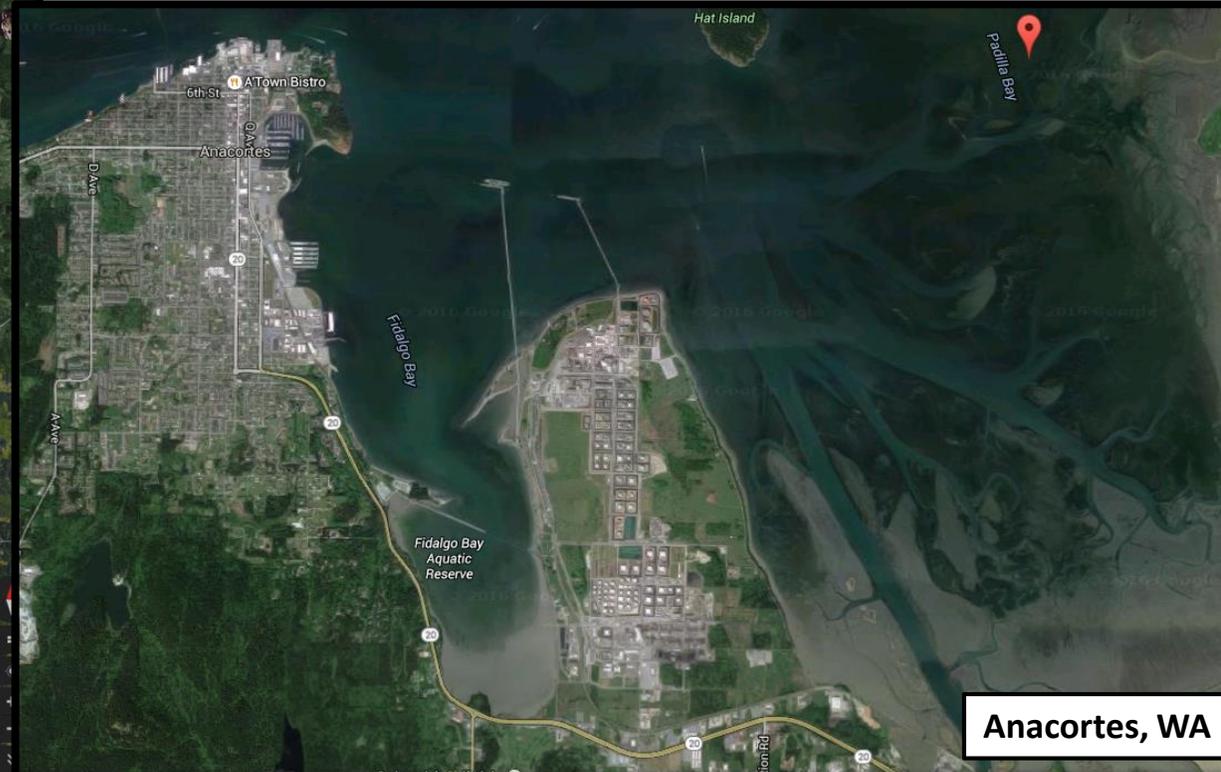
Eureka, California



Morro Bay, California



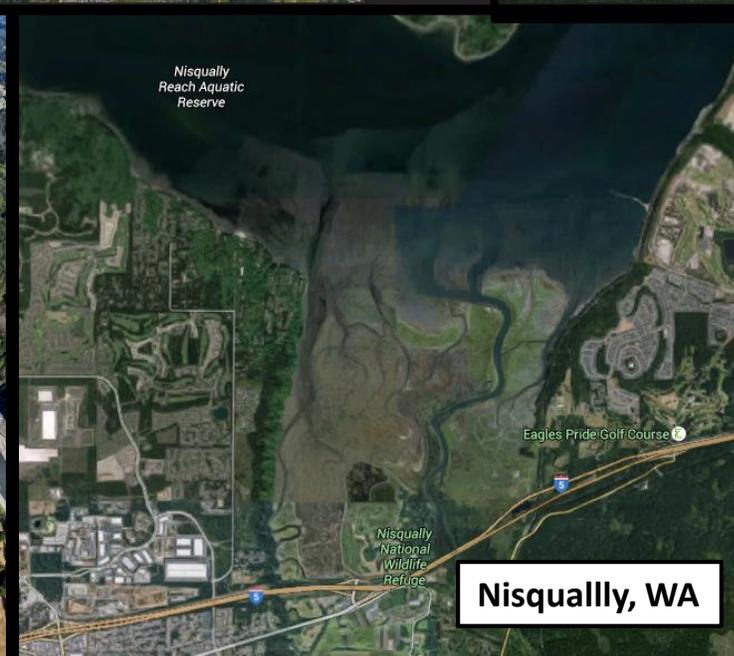
Everett, WA



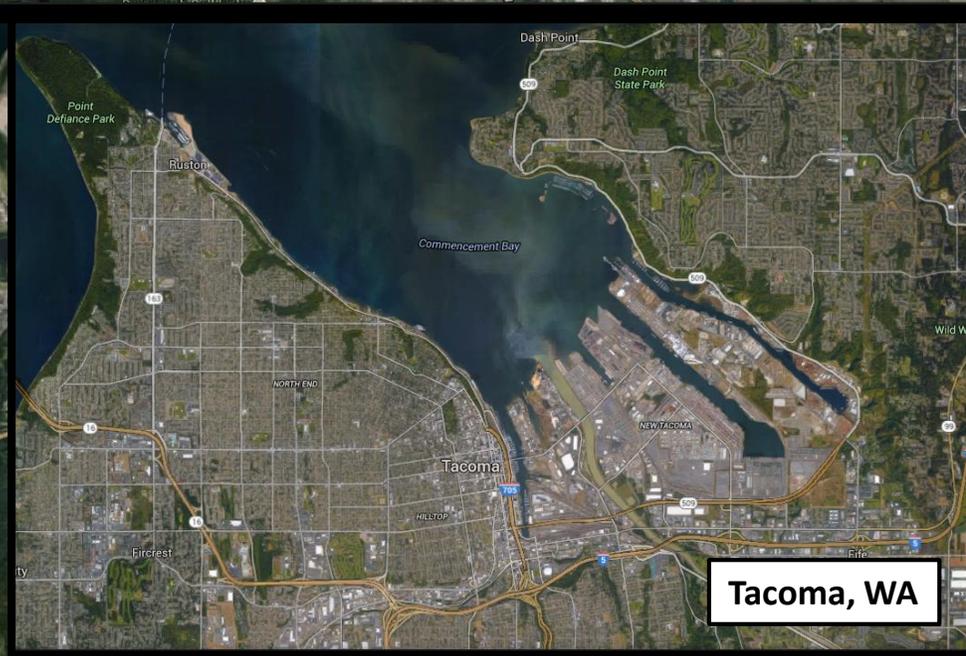
Anacortes, WA



Elwha, WA

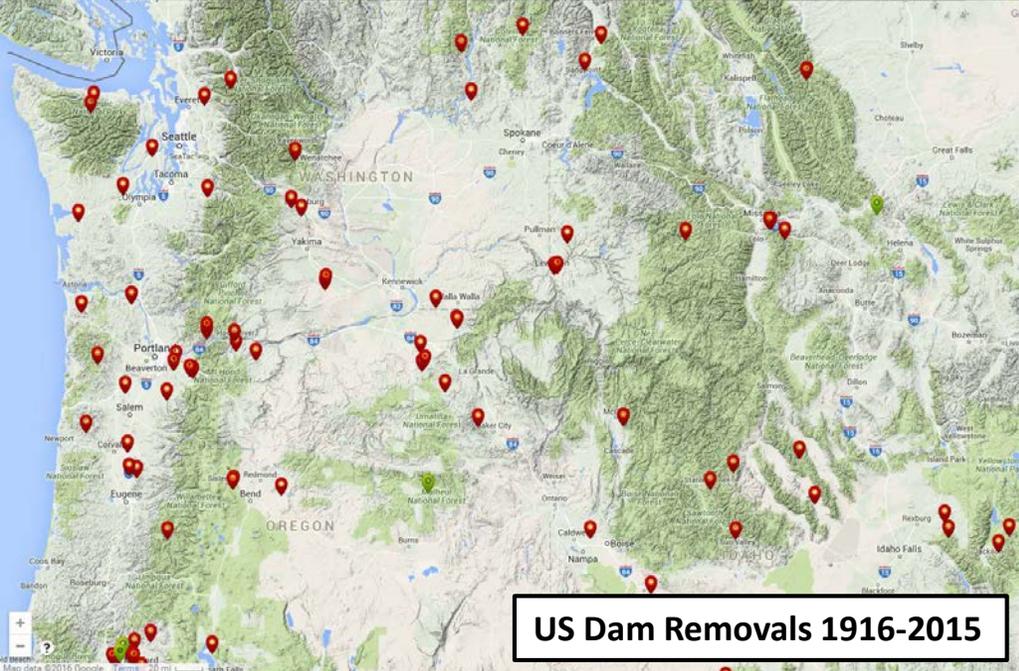
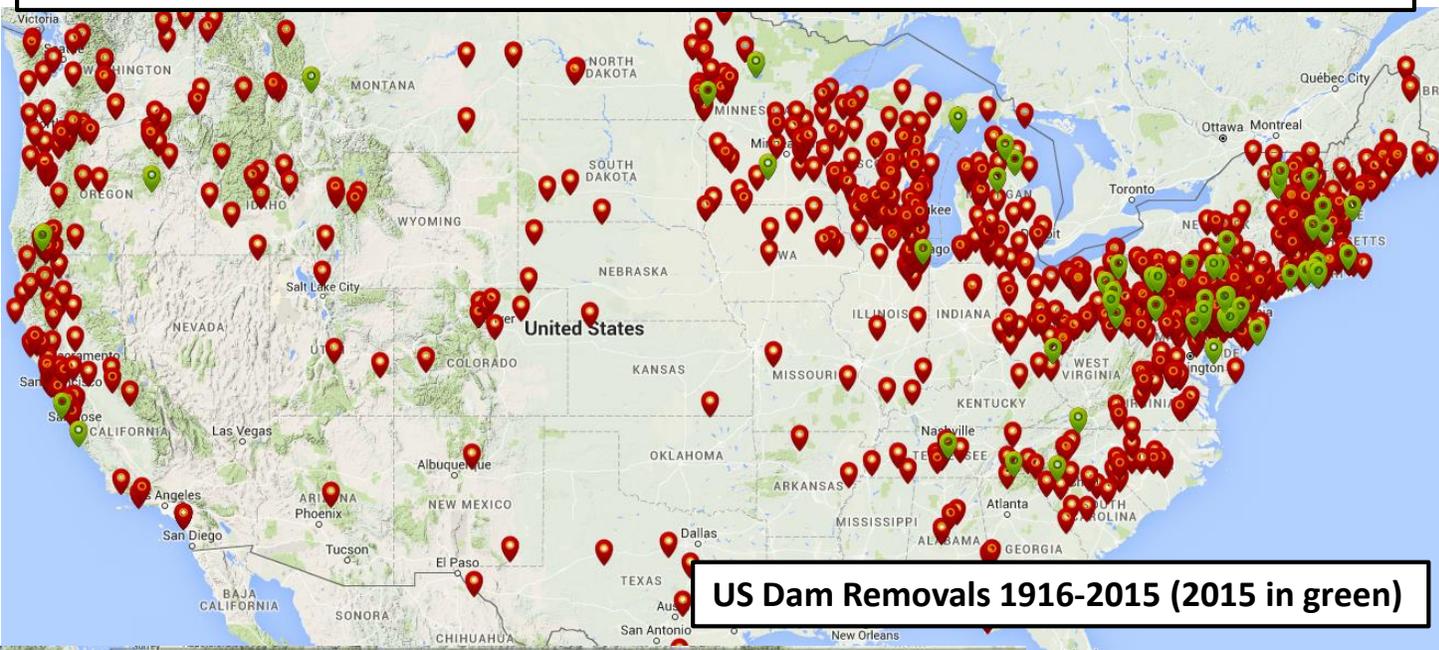


Nisqually, WA



Tacoma, WA

Are dam removals and restoration common?



PSNERP Candidate Restoration Actions



Puget Sound Nearshore Ecosystem Restoration Projects