

WASHINGTON STATE



Washington State Parks

**Location Assessment and Financial Analysis for Yurt and Cabin
Development**

Prepared:

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Washington State Parks and
Recreation Commission

Rex Derr, Director

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Development**

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Table of Contents

I. INTRODUCTION.....	1
II. NATIONAL/REGIONAL MARKET OVERVIEW	3
III. CAMPGROUNDS WITH YURTS AND CABINS	9
IV. OVERNIGHT CAMPING IN WASHINGTON STATE.....	13
V. PROFILE OF WASHINGTON STATE PARK CAMPERS.....	29
VI. STATE PARK ASSESSMENT AND EVALUATION.....	37
VII. FINANCIAL ANALYSIS.....	45

Acknowledgments

This study was prepared for the Washington State Parks and Recreation Commission to support business planning efforts. The purposes of this study were to identify those Washington state parks most desirable for yurt and cabin development, and to assess the potential return on investment.

In preparing this report, we received support from Washington State Parks staff, which we thankfully acknowledge.

I. Introduction

This *Location Assessment and Financial Analysis for Yurt and Cabin Development* will assist Washington State Parks with identifying the most desirable state parks in which to expand its successful yurt and cabin rental program. Currently, the state park system has 15 yurts and cabins in operation at two parks, and plans to put on-line an additional 150 units by 2007.

A methodical and objective procedure was developed that focuses on the market-demand factors most integral to the yurt and cabin customer rental decision, and then responds with a site location strategy intended to maximize revenue from the expansion-phase units. Based on a selection of specific criteria, the location assessment serves as an example of a methodological procedure intended to identify Washington state parks most desirable for yurt and cabin development. The findings described in this assessment are intended as preliminary and exemplary. Final site selection will warrant a more rigorous evaluation within the context of the identified criteria as well as the potential for additional and/or revised information pertinent to yurt and cabin development.

The agency's strategic plan calls for statewide programs that will generate revenue, provide visitor services, diversify its funding base and improve its economic self-sufficiency. Fees for overnight camping constitute the primary source of earned income for Washington State Parks.

This report also analyzes the financial benefits of the recommended yurt and cabin development, making use of a financial management model developed for this purpose. Factors in the analysis include development costs, projected revenues and expenses, net present value of cash flows, and returns on investment.

Previous Research Findings¹

Camping continues to be one of the most widespread outdoor recreation activities in Washington State Parks. Camping is an activity in itself, taking families and groups to recreation areas throughout the state's coastal, mountain, desert, lake and other recreation locations. Camping also represents a form of visitor accommodation—used by many travelers who visit historic sites, sightsee, hike, fish and participate in a wide range of recreation activities.

Previous research indicates that additional yurts and cabins will improve revenue generation for Washington State Parks. Priority locations were identified as year-round state parks close to the state's large metropolitan areas. Highlights included:

Generate wider base of campers: Yurts and cabins will generate more overnight stays by current visitors and attract new campers to the parks.

¹ See Appendix for the literature review.

Extend length of season: Yurts and cabins placed in year-round parks will extend the camping season by attracting more shoulder season campers.

Expand close to urban markets: Those parks within an hour's drive of urban areas offer the greatest potential for yurts and cabins to attract more campers.

II. National/Regional Market Overview

A number of national/regional economic and demographic factors affect camping travel patterns and the demand for camping at Washington State Parks. The following are important demographic, demand and other trends in North America that influence the market feasibility of new campground development in Washington. These factors are important to both near- and long-term decisions regarding the development priorities of Washington State Parks.

Demographics

American population is aging	The primary population growth is currently in the 50-59 age range, which increased by 17% between 1998 and 2003, compared to 2.5% on average for other age ranges. This age group is more likely to be empty nesters; only around 20% still have children at home, compared to 75% for those 40-49 years of age. Yet, relatively few are retired –only 20% – compared to almost 80% for those 65 years of age or more. The retired population will increase strongly after 2010 (those 65 years of age or greater will increase by 33% by 2020; three times the rate of the next fastest range).
More dual-earner households	Over 62% of married women are in the workforce in 2003 (compared to 58% in 1990, 50% in 1980 and 40% in 1970), while 78% of married men are in the workforce. With more than one worker it is more difficult to schedule travel, which often means shorter trips, more frequently. Studies conducted by The Travel Industry Association (TIA) report shorter and leisure-oriented trips taken by married travelers 45 and older now dominate the travel market. Further, short trips (1-2 nights) are now reported to be far more popular than longer trips. Shorter trips tend to be more single-purposed – focused on one or two activities; the most popular consist of shopping, outdoor activities, historical places/museums, beaches or national/state parks.
Increasing incomes for some Americans	Incomes of professional, educated households have been increasing, producing a segment of the population with adequate resources for travel and recreation. Incomes of managerial, professional and technical workers increased nearly 20%, in constant dollars, over the past decade (1991-2001), while incomes of service, production and labors increased just 6%. Workers with Bachelor's or Master's degrees had income growth of 12% compared to 7% for those with only high school diplomas. In addition, much of the population is not sharing in this income growth at all. The top 20% of households now receive half of all income, with the remaining 80% receiving the other half. This top fifth's share has increased dramatically over the past decade, while four-fifths of households have seen their share of all income decline. While this trend has slowed in recent years, it is not

expected to reverse, and leaves a smaller segment that can and will continue to travel freely. Most will do so on a more limited basis and be very value-oriented.

Educated population The American population is becoming increasingly educated: over a quarter (25.6%) of American adults have four or more years of college, compared to 20% in 1990, 17% in 1980 and 11% in 1970. Educated travelers tended to be interested in information-rich activities.

Travel Trends

Shorter vacations, more frequently North American households are more likely to take long weekend and other relatively short trips; the incidence of extended, multi-destination long-distance travel has been on the decline. More than half of all travel trips in the U.S. are now for 2 days or less, with only two in ten trips lasting a week or more. Thus, most travelers are taking vacations closer to home; half of Americans in TIA's survey of travelers said they were planning to travel closer to home in 2002. Travel by personal motor vehicle increased significantly in 2002 (3%) while travel by air declined.

Children travel more often with parents or relatives More travel includes children. The number of trips taken in North America by adults with children increased 18% between 1994 and 2002, while those taken by adults only (1 or more) *declined* by just under 1%. Accordingly, trips have become more oriented to educational and recreational experiences, and are also requiring a higher service level (more bathrooms, child-oriented food service) that children require.

Meetings travel slows Travel for meetings, conferences and conventions was on a long-term growth trend throughout the 1990s, associated with the growing US economic activity of the period. Since 2000 however, this segment of business travel has been in a serious decline, which will likely extend through at least 2005. Lower airfares for business travel may begin to have some effect on this segment in the coming year.

Organized group Travel Organized group travel -- by motorcoach, cruise ship or air transportation -- had been increasing through the 1990s, however, this growth essentially stopped in 2001 and 2002 (with a 9% decline). This is likely a temporary slowing related to political and economic uncertainty. Long term increases in this segment should continue, as it is highly correlated to the aging of the North American population and increasing incomes. Much of this travel is during summer and is very value-oriented.

Seasonality	The preferred leisure travel season is June, July and August, when well over a third of leisure travel occurs. Family travel, in particular, is oriented to these three summer months. Spring and Fall travel tends to be somewhat more popular among empty nesters. Meetings/convention travel is more oriented to fall and spring.
Travelers want education, packaged experience	The growth in travel and vacation trips which include children has increased the demand for educational experiences. Many analysts have noted a “back to basics” trend in the leisure travel market since 2001. This means vacations and travel activities that involve family, nature and America itself. Trips to visit friends and relatives, visiting national and state parks and increased interest in America’s heritage and culture through historic sites will be the preference.
Business and leisure travel are combined more	Travelers are more often extending business trips to include leisure activities. These travelers provide a good market for destinations in or adjacent to major metro areas. Business trips are also more likely to include spouses and children than in the past (these trips increased 25% between 1994 and 2002, while solo trips declined by over 5%). However, the majority of business trips (74%) are taken by solo travelers.
Entertainment increasingly important	Entertainment is an increasingly important component of travel and recreation, and of education as well; travelers and facility users expect very good presentation, interactivity, visual appeal; competition and gaming are very popular.
Travel parties and grandparents	Travel parties including grandparents are increasing. These trips may have an educational focus and would not tend to include strenuous activity.
Membership programs increasing	Travel associated with membership programs is increasing: RV clubs, senior citizen organizations, membership reward programs (e.g., frequent fliers). Family reunions are a popular reason for travel.
International Travel in the U.S.	Travel from foreign destinations, like most other segments of travel, had been increasing through the 1990s. However, international travel has been down for the past several years, (down 11% between 2000 and 2001), influenced by poor economic performance overseas and the events in September 2001. The most important markets are Canada and Mexico, which send more travelers to the U.S. than any other foreign nations, with 59.6 and 9.6 million visitors respectively in 2001. The UK is the top overseas county for inbound travel with nearly 4.2 million visitors. Japan, Germany, France, South Korea, Brazil, Venezuela and Italy round out the top ten. These travelers are particularly interested in

things that are historic, unique and memorable. International travel is strongly affected by exchange rates.

The primary pertinence of these factors is discussed in the review section at the end of this chapter.

Traveler Priorities

Research on travel and travel behavior indicates some trends in what travelers want from their trips. These are very important to keep in mind when considering project elements and design factors for campgrounds.

Convenience Easy access, clear directions, as little congestion as possible: make it easy. Some localized congestion may be acceptable, particularly if it seems to represent the appeal of a very good location.

Safety A primary concern, particularly with older travelers. The perception of diminished safety in many urban areas leads people to want to get away from these concerns to the extent possible: locations such as state parks can capitalize on this concern.

Cleanliness Particularly important with most travelers – especially those that are well off. Buildings, interiors and grounds must be as clean, neat and orderly as possible.

Good service Attentive, careful service stands out in travelers’ minds. It is the basis of contemporary business success stories such as Starbucks and Nordstrom. Travelers can cope with some inattentive and even rude service, but it is one of the most undesirable aspects of travel for many.

Escape The complexity of many lives today means travelers want to get away, avoid stress, and relax. Younger travelers like to include some focused activity as part of trips, such as biking, hiking or sports. For older travelers, a trip may well involve some active recreation, but it is most often low key, such as golf or fishing. Education can serve as an important motivation, particularly when combined with field experiences.

History and nostalgia History remains one of the most common interests among travelers. This interest can be easily combined with natural resource topics.

Wildlife The presence of wild animals is an important indicator of quality; to some, having wild animals around means that you have “escaped.” But what constitutes “wild animals,” and what represents good quality viewing and other related experiences varies widely. To some, this is a very casual activity, what others would call simply sightseeing.

Good weather Most vacation travel takes place during summer months and is oriented to

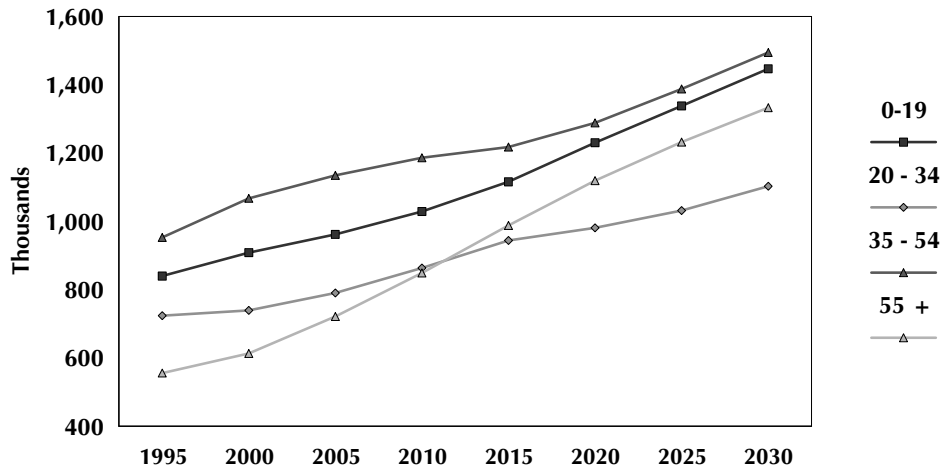
locations with “good” (sunny and warm) weather. Winter travel is primarily oriented to either winter recreation locations or to locations with warm weather (Mexico, Caribbean). Weather conditions will always be a factor for camping in the Pacific Northwest; success at Oregon State Park locations with yurts/cabins indicates that camping can be effectively enhanced during shoulder seasons.

Parking Parking is a big concern for many travelers who drive (which will include all visitors to Washington State Parks). Poor parking is very inconvenient, and good parking is a draw. Good parking is also safe and clean.

Population Projections

Population projections for the Seattle-Bellevue-Everett, Tacoma and Olympia Metropolitan Statistical Areas (MSA) presented in Figure 2-1 indicate substantial increase in the older age groups through 2030. This pattern is similar to most areas, states and the nation. Projections generally indicate that older segments will become more prominent and younger segments less so. However, the two age groups representing people 34 and under represent one-half of the area population in 2005 (49.5%), albeit with slower growth over the next decade. Economic factors such as job and business prospects will be determining factors in these projections.

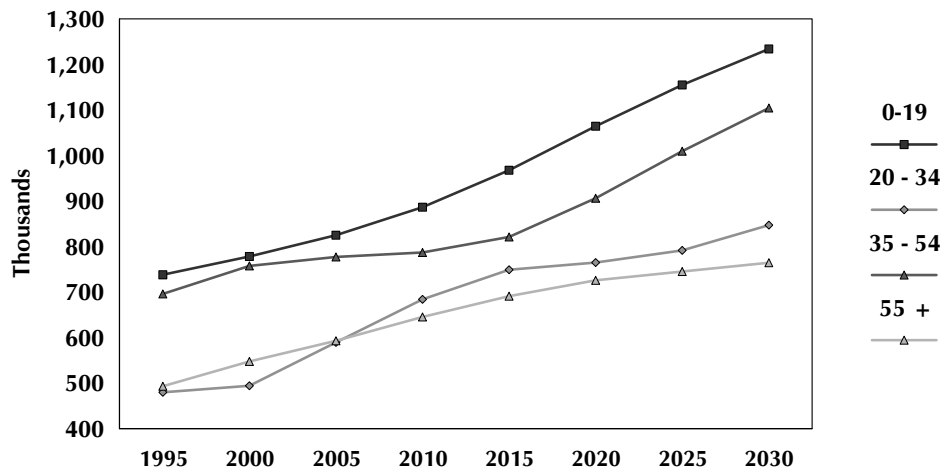
Figure 2-1
**Seattle-Bellevue-Everett, Tacoma and Olympia MSAs
 Population Projections, by Age Segment
 1995 – 2030**



Source: Dean Runyan Associates / U.S. Census Bureau

Population projections for the rest of Washington (i.e., excluding Seattle-Bellevue-Everett, Tacoma and Olympia MSAs) presented in Figure 2-2 indicate similar trends with the exception that the growth for the older age segment (55 and over) is relatively flat by comparison; an indication that the younger age segment will continue to remain more prominent in least urban areas of the state.

Figure 2-2
Washington (excluding Seattle-Bellevue-Everett, Tacoma and Olympia MSAs)
Population Projections, by Age Segment
1995 – 2030



Source: Dean Runyan Associates / U.S. Census Bureau

The primary implications for these regional and national travel and vacation trends include the following:

- Over time, the market among empty-nest and retired Washington residents will increase as this age segment becomes larger in the state as well as the U.S. population.
- Education will remain an important motivation for travel, particularly among families.
- Washington State Parks can capitalize on their locations as places to get away, relax and also learn new and interesting things.
- Yurts and cabins can serve all ages, particularly families who seek outdoor recreation experiences with children.
- Yurts and cabins can appeal to those seeking fairly focused and/or short “getaway” vacations for households within the Northwest and the Puget Sound area in particular

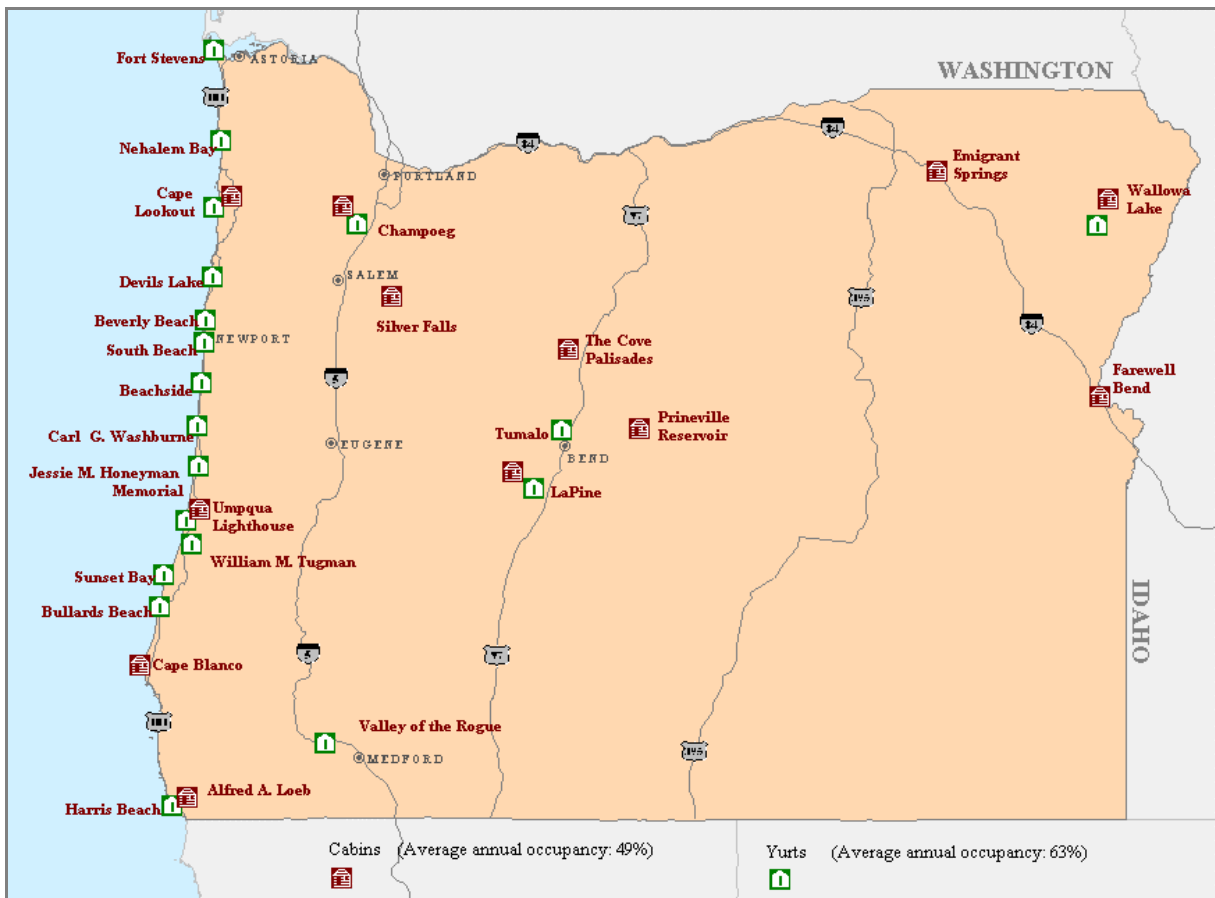
III. Campgrounds with Yurts and Cabins

This section provides an overview of the primary locations in Washington and Oregon of campgrounds that offer yurts and cabins.

Oregon State Parks

Oregon State Parks manages twenty-eight state park or recreation areas with yurts or cabins, with a total inventory of nearly 200 yurts and over 50 cabins. As shown on Figure 3-1, most of the Oregon State Parks campgrounds are located along the Oregon coast. Rates per night for basic yurts and cabins are \$27 and \$35, respectively. Due to strong demand during the shoulder seasons, the average annual occupancy rates for yurts (63%) and cabins (49%) are significantly higher as compared to other types of campsites (i.e. full hook-up, electrical, and tent).

Figure 3-1
Yurts and Cabins in Oregon State Parks



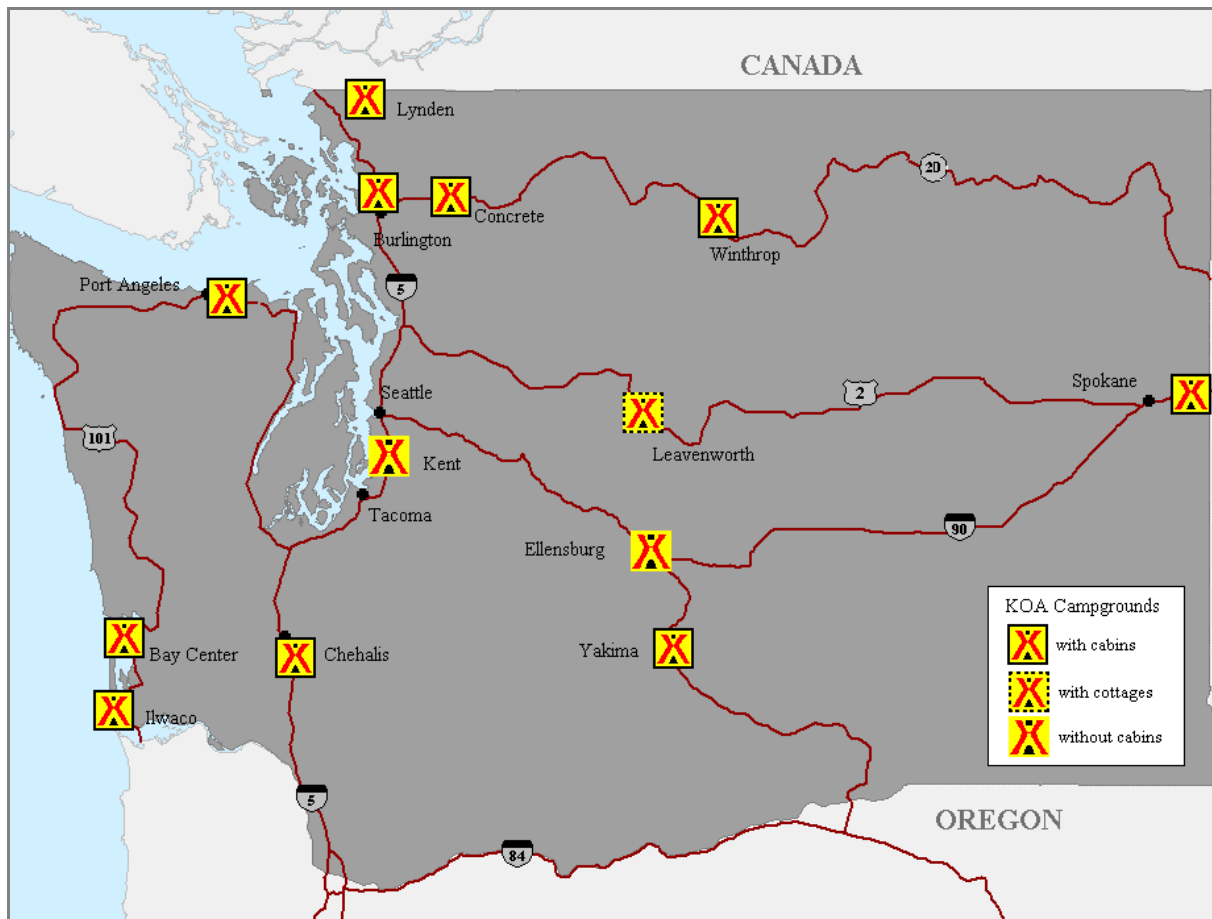
KOA Campgrounds in Washington

KAO (Kampgrounds of America) operates the largest franchise system of commercial open-to-public campgrounds in the United States. In addition to providing RV and tent sites, most KAO campgrounds (90%) offer cabins and/or cottages. Cabins are equipped with electric lights (in most areas), lockable doors and wood-frame beds with mattresses. Many of cabins also have indoor heating and air-conditioning. In addition, cottages feature a kitchenette, dining area, bathroom and shower. Two person rate ranges for cabins and cottages are \$35-70 and \$100-160, respectively.

Most KOA campgrounds (80%) are within 100 miles of a metropolitan area. These campgrounds feature RV hookups, individual hot showers, coin-operated laundry facilities, swimming pools, clean restrooms, playgrounds, Internet access and a convenience store at each of its locations. Many are planning to extend the list of available amenities and options to offer different activities, entertainment, tour packages, on-site equipment rental and more.

In the state of Washington, KOA campgrounds are located primarily along travel corridors particularly along the south coast, northwest and central regions of the state (see map below).

Figure 3-2
KOA Campgrounds in Washington



Snohomish County Parks

Snohomish County Parks began operation of a nine-yurt village called Kayak Point County Park in March 1999. Kayak Point County Park has a boat launch that offers access to Puget Sound and a pier. Yurts in Kayak Point County Park rent for \$40-45 per night or for \$60 with RV parking. Yurts feature hardwood floors, electricity, screen windows, skylight, and locking doors. Parking fee/Boat Launch Fee is \$5.00 per day.

Point of origin data shows the vast majority of yurt campers (92%) travel from locations within 50 miles of the park. The oval area shown in Figure 3-3 below illustrates this geographic area, where nine out-of-ten of the yurt campers originated. Presumably, these campers could have easily driven back to home at the end of day, but preferred to camp overnight because of recreational opportunities and/or availability of yurts.

Figure 3-3
**Kayak Point County Park and
Yurt Campers Primary Area of Origin**



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IV. Overnight Camping in Washington State

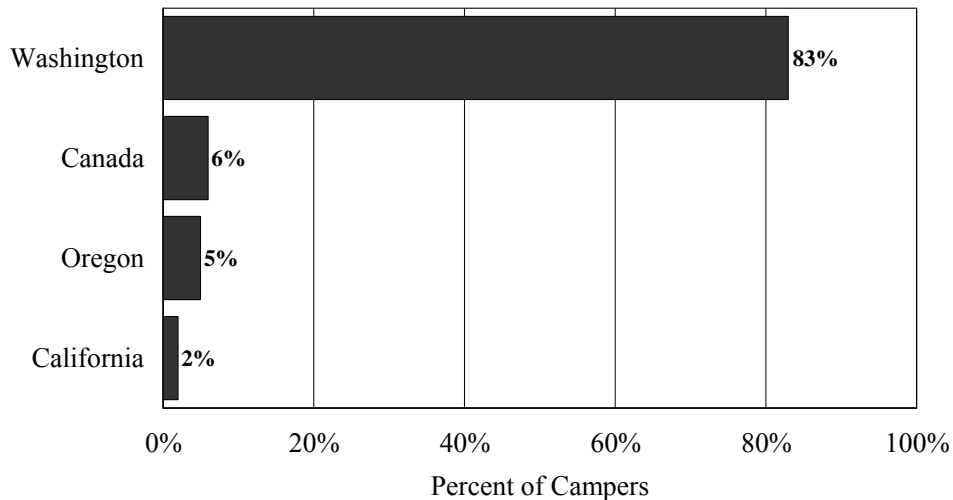
This section provides a detailed overview of campground facilities in Washington state parks by region, including indicators of camping activity, (as measured by average annual occupancy rates), and state/metro area sources of campers to each region of the state. Overall, seventy-nine Washington state parks offer some type of camping facilities, which include over 7,000 campsites. The characteristics and demographics of campers and camping parties are based on data collected through Washington State Parks reservation system and results of statewide telephone surveys of campers.

Camping in Washington State Parks

The majority of state park campers in Washington are in-state residents.

Eighty-three percent of Washington state parks campers are residents of Washington. Regionally, 88% of campers are concentrated in the Pacific Northwest states of Washington and Oregon, with an additional 6% visiting from Canada. The top sources campers to Washington State Parks are shown in Figure 4-1.

Figure 4-1
**Washington State Parks
Top Sources of Campers, 2003**



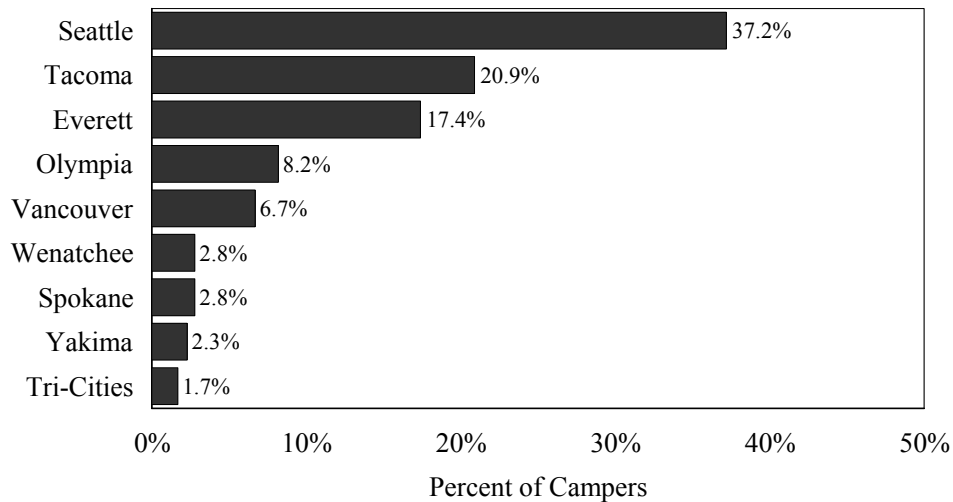
Source: Dean Runyan Associates

Note: Based on data from Washington State Parks Reservation System, 2003

Most campers from Washington State are from metropolitan areas surrounding Puget Sound: Seattle, Everett, Tacoma and Olympia.

Of the total number of state parks camping trips taken by residents of Washington during 2003, most (84%) originated from the Puget Sound area (Seattle, Everett, Tacoma and Olympia), as shown in Figure 4-2. Other sources of Washington resident campers include: Vancouver, Wenatchee, Spokane and Yakima.

Figure 4-2
**Washington State Parks
Washington Resident Sources of Campers, 2003**



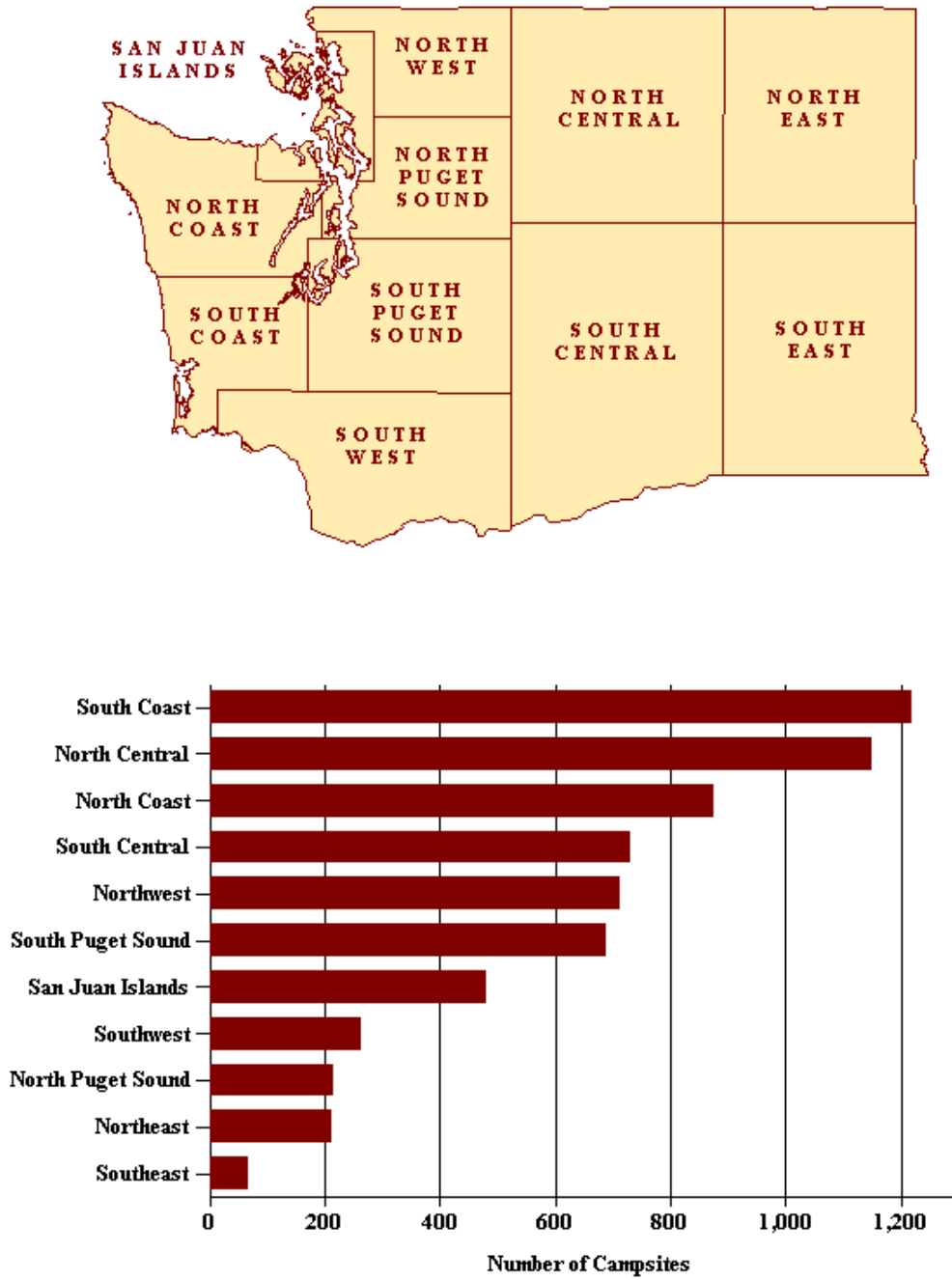
Source: Dean Runyan Associates

Note: Based on data from Washington State Parks Reservation System, 2003

An assessment of the volume of campsites by region provides a measure of the current concentration of camping activity (an indication of demand for campsites) in Washington state parks. In addition, the current concentration of campsites offers a relative degree of comparison among different regions as to the potential opportunities to re-design existing sites (as well as to add new sites in existing parks) in order to develop additional yurts and cabins.

As shown in Figure 4-3, Washington State Parks campsites are most concentrated in the North and South Coast, North and South Central, Puget Sound, San Juan Islands, and the Northwest (which borders British Columbia) regions of the state. In contrast, the Southwest and Eastern regions of the state have relatively fewer campsites and state parks. The numbers of campsites shown represent the total of all standard, utility, and primitive campsites.

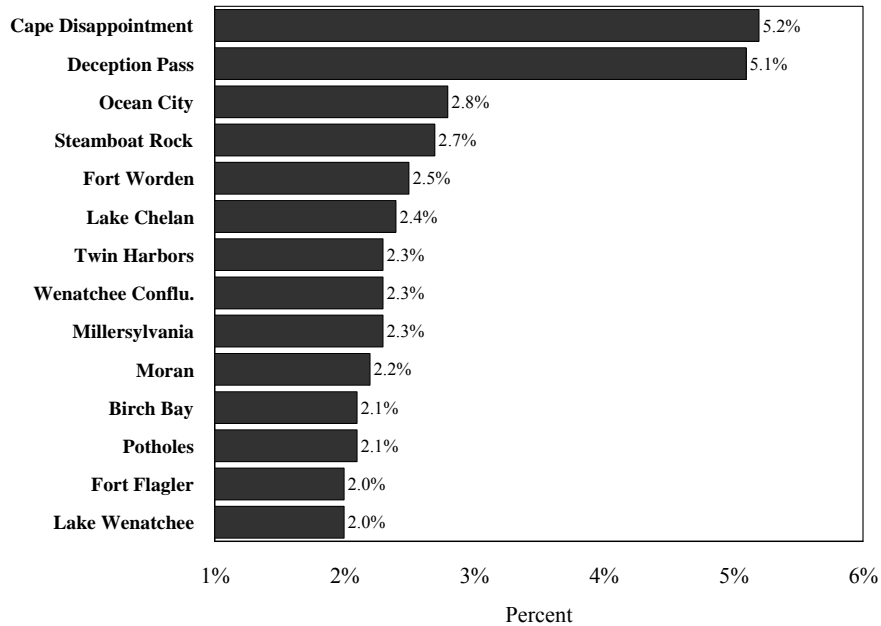
Figure 4-3
Washington State Parks Campsites by Region, 2003



Source: Dean Runyan Associates, Washington State Parks and Recreation Commission.

The most popular state parks for overnight camping are located in South Coast, Puget Sound, San Juan Islands, Southwest and North Central Regions.

Figure 4-4
Percentage of All Washington State Parks Camping



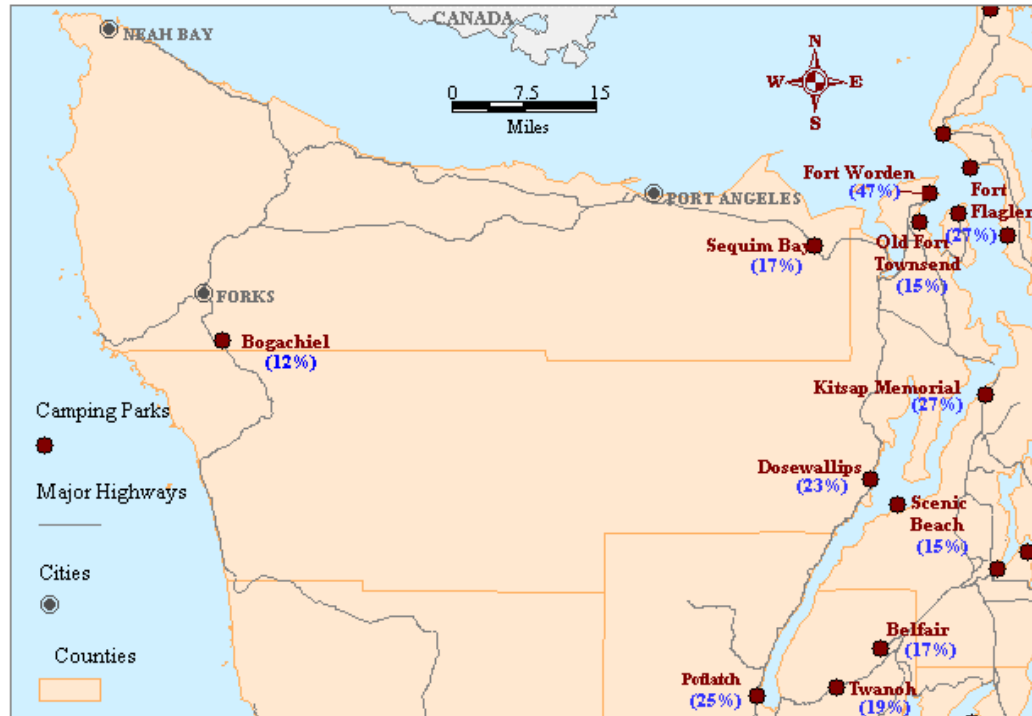
Source: Washington State Parks campground attendance, Sept. 03-Aug. 04

Maps of eleven regions in the state identify the locations of state parks with campground facilities, and the average annual occupancy for the total number of campsites. Information is based on total person-nights camping data provided by Washington State Parks (adjusted to reflect an average camping party). While these occupancy rates are strictly estimates and may reflect over or under-estimates in use counts, they provide a valuable indication and relative comparison of demand among the campgrounds located in Washington state parks.

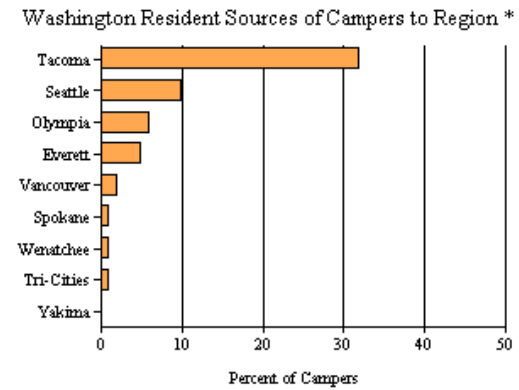
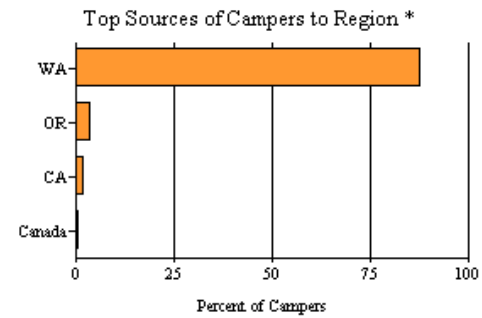
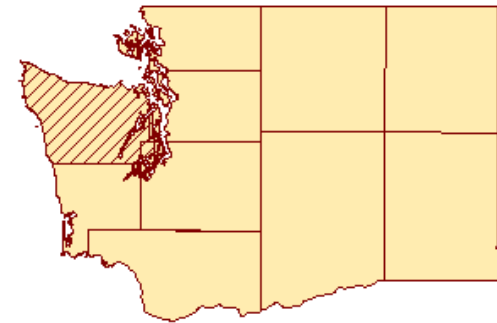
In addition, summaries of visitor origin are provided for each region in which estimates are available (estimates based on RNW data for those campgrounds that accept reservations). While this data does not reflect those “walk-in” campers who did not make reservations through the centralized computer system, it does provide a valuable indication of the primary sources of markets as well as relative comparisons among each of the regions.

NORTH COAST REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



PARK	CAMPSITES
Belfair	181
Bogachiel	43
Dosewallips	139
Fort Flagler	121
Fort Worden	85
Kitsap Memorial	47
Old Fort Townsend	40
Potlatch	37
Scenic Beach	52
Sequim Bay	81



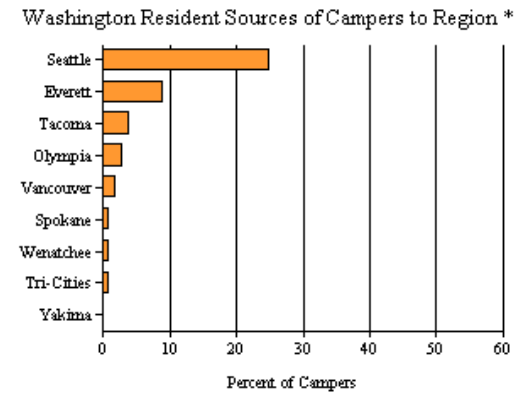
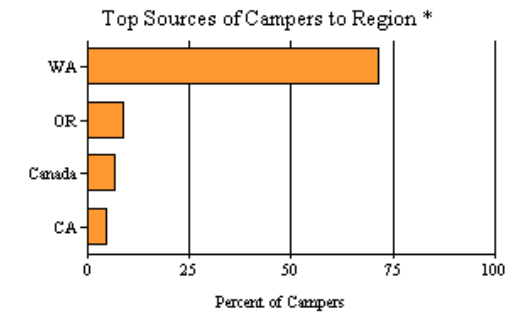
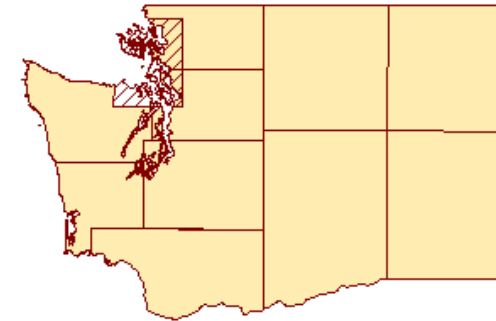
* Camper Origin based on Reservation Data, 2003

SAN JUAN ISLANDS REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



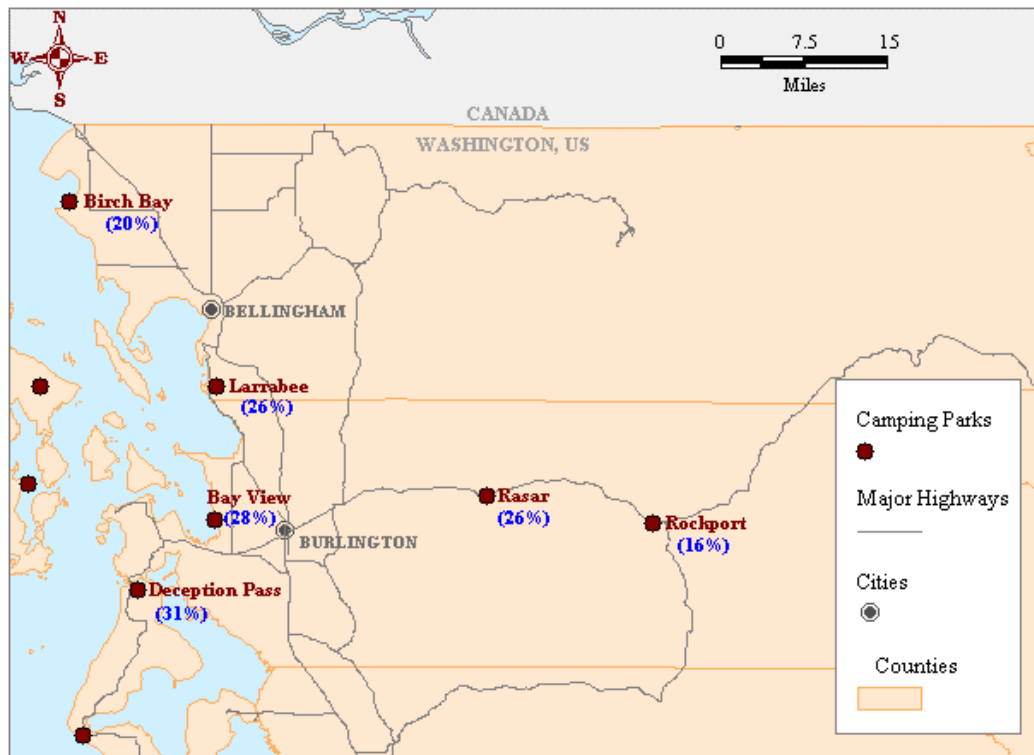
PARK	CAMPSITES
Camano Island	88
Fort Casey	38
Fort Ebey	54
Moran	149
South Whidbey	51
Spencer Spit	44
Sucia Island	55



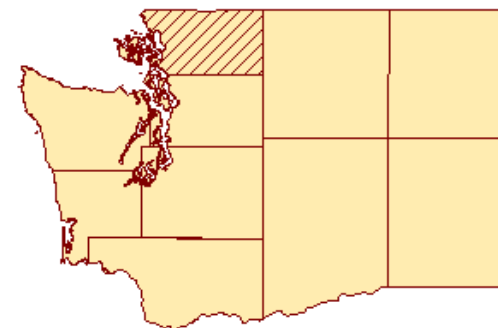
* Visitor origin based on State Park Reservation Data, 2003

NORTHWEST REGION

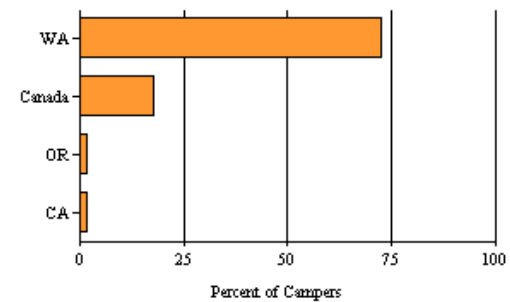
State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



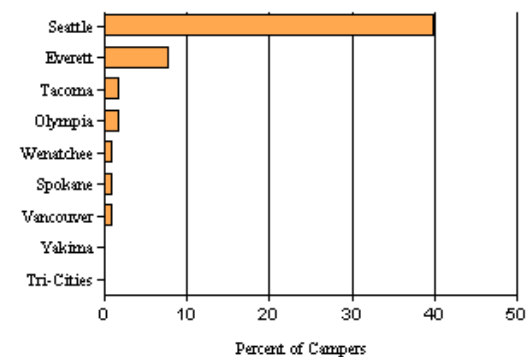
PARK	CAMPSITES
Bay View	80
Birch Bay	169
Deception Pass	265
Larrabee	89
Rasar	49
Rockport	61



Top Sources of Campers to Region *



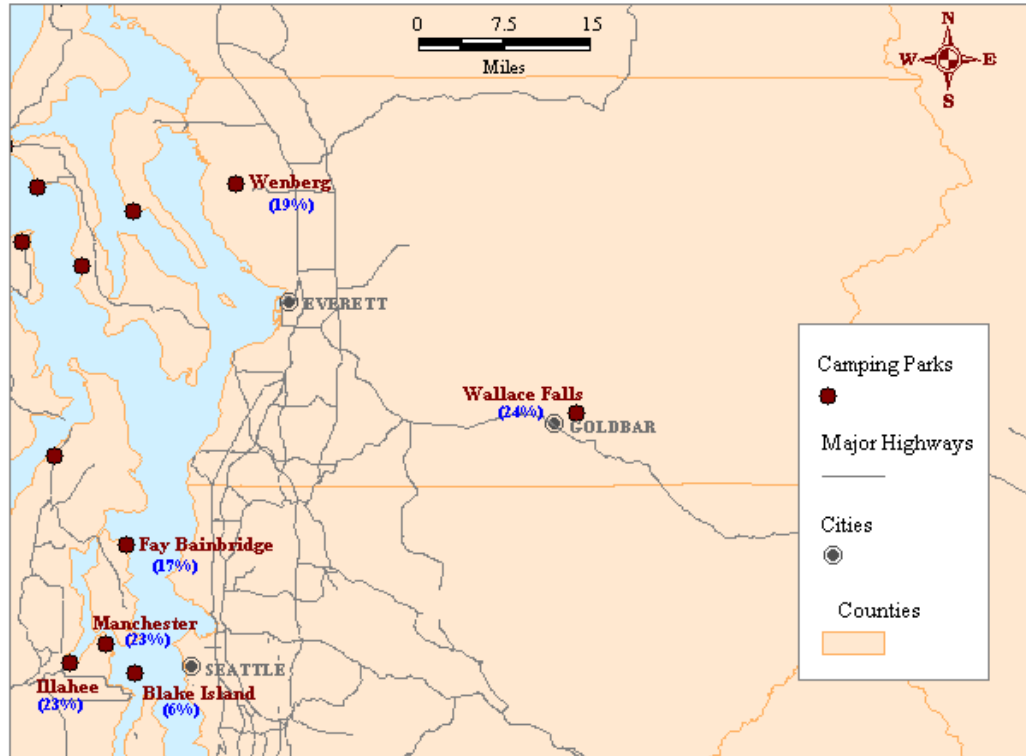
Washington Resident Sources of Campers to Region *



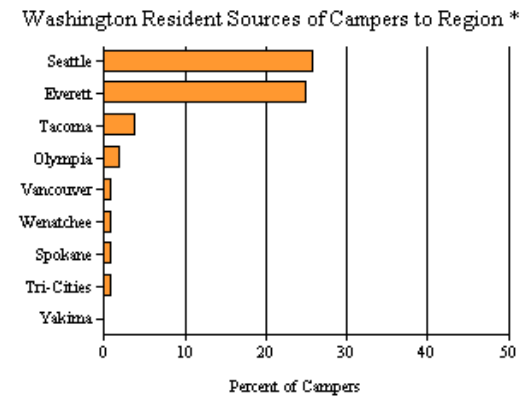
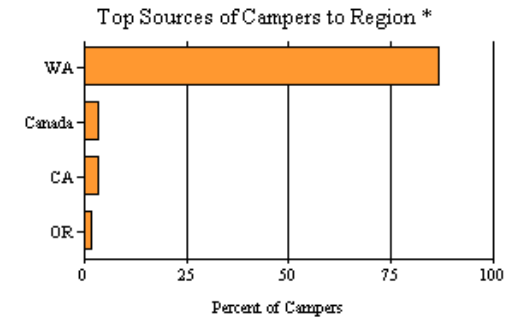
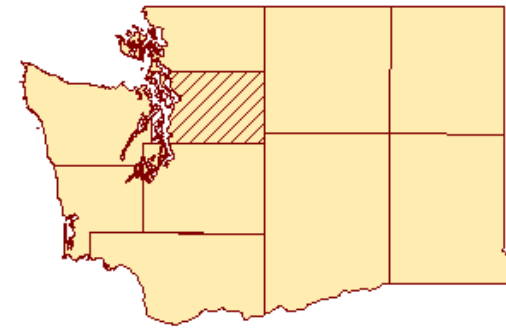
* Camper Origin based on Reservation Data, 2003

NORTH PUGET SOUND REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



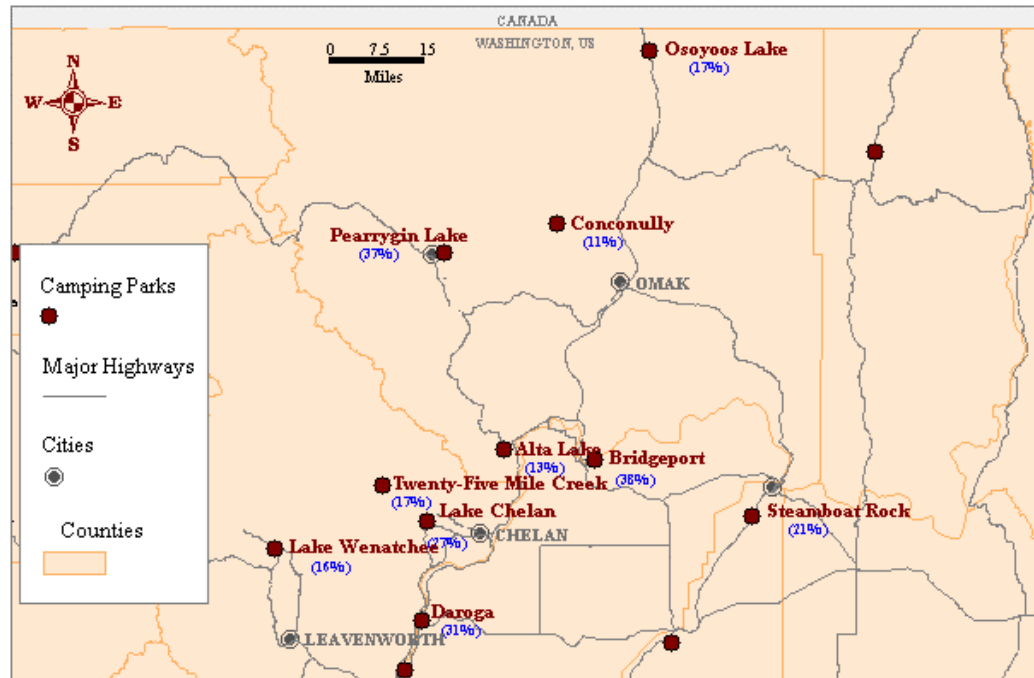
PARK	CAMPSITES
Blake Island	57
Fay Bainbridge	39
Illahee	33
Manchester	55
Wallace Falls	6
Wenberg	79



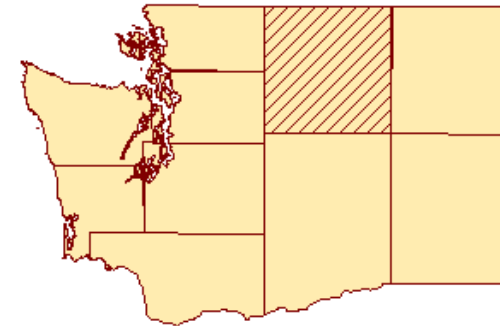
* Camper Origin based on Reservation Data, 2003

NORTH CENTRAL REGION

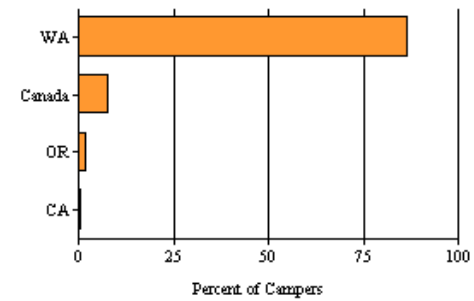
State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



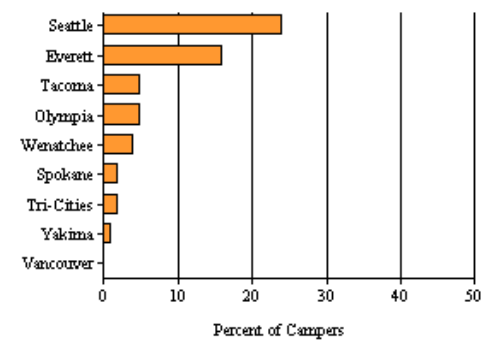
PARK	CAMPSITES
Alta Lake	189
Bridgeport	34
Conconully	73
Daroga	47
Lake Chelan	144
Lake Wenatchee	199
Osoyoos Lake	87
Pearrygin Lake	84
Steamboat Rock	209
Twenty-Five Mile Creek	84



Top Sources of Campers to Region *



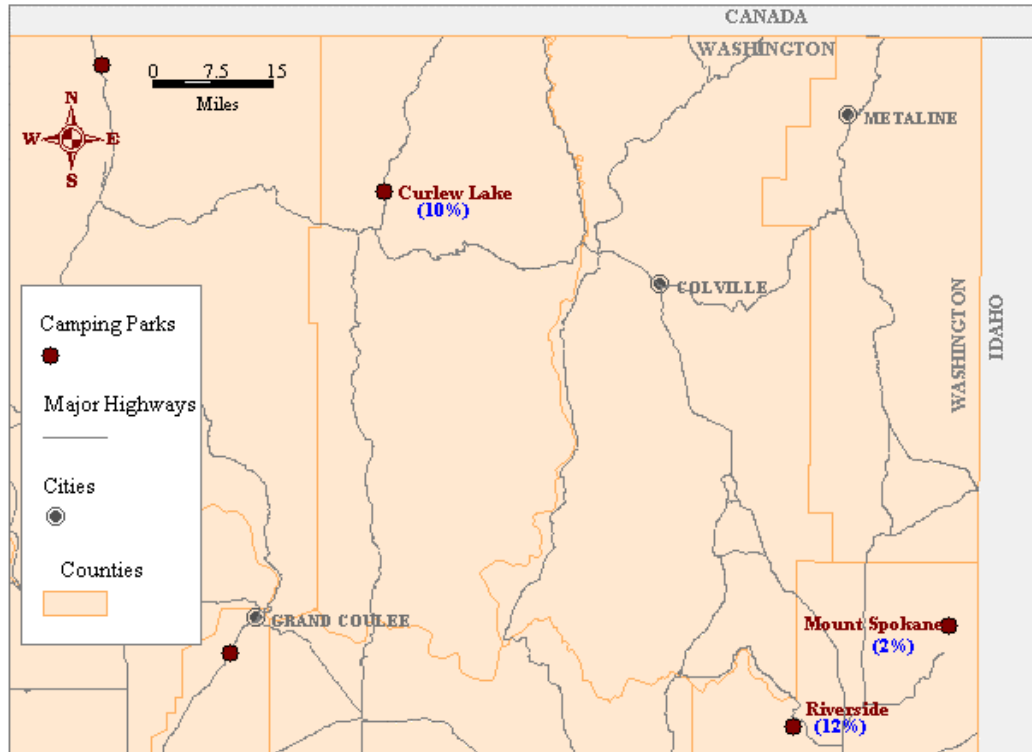
Washington Resident Sources of Campers to Region *



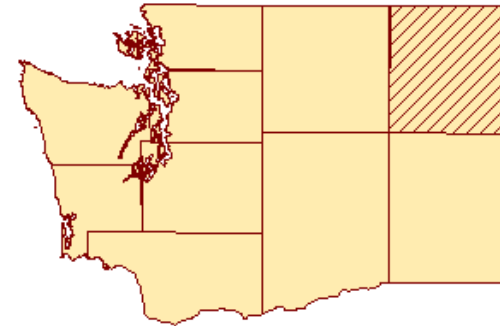
* Camper Origin based on Reservation Data, 2003

NORTHEAST REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



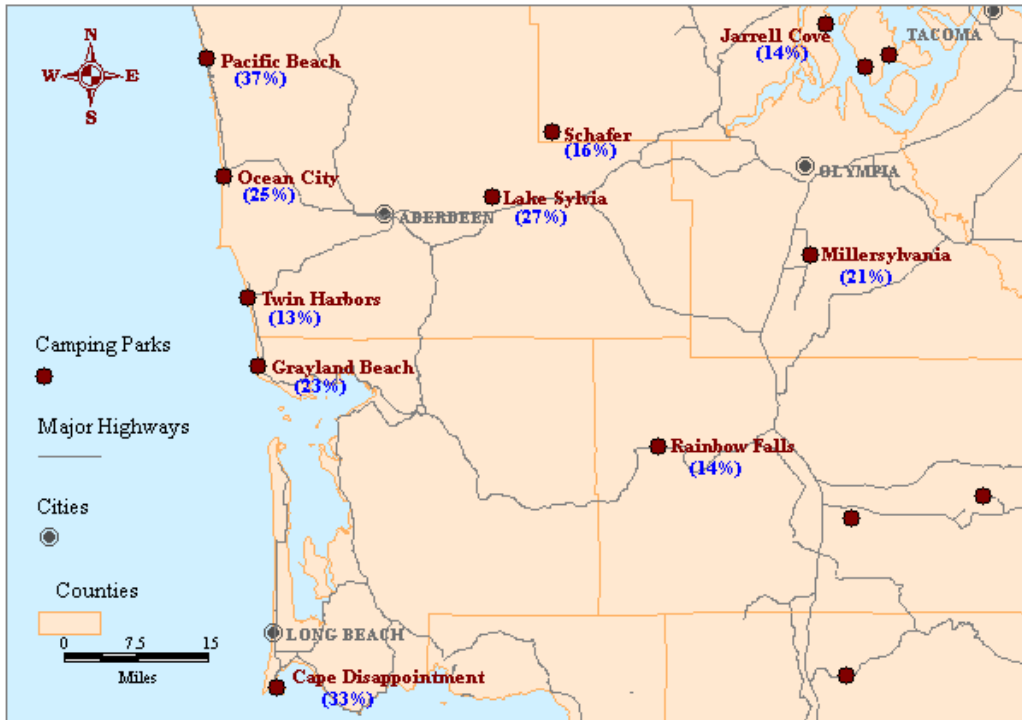
PARK	CAMPSITES
Curlew Lake	99
Mount Spokane	12
Riverside	101



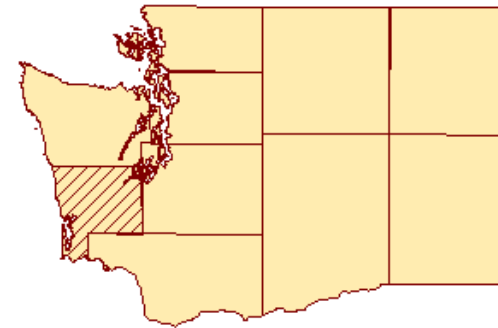
Note: Visitor origin data is not available for state parks identified in this region.

SOUTH COAST REGION

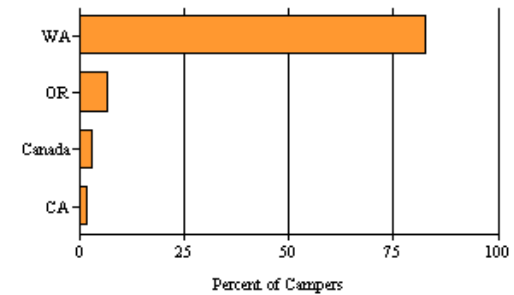
State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



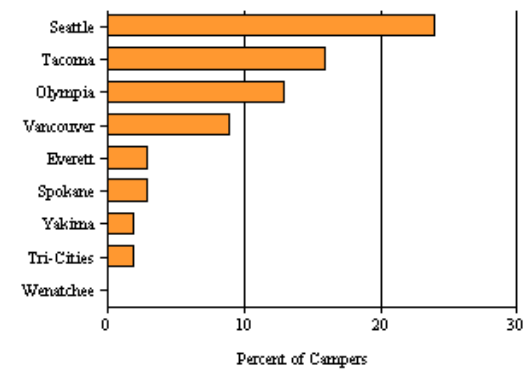
PARK	CAMPSITES
Cape Disappointment	254
Grayland Beach	113
Jarrell Cove	22
Lake Sylvia	37
Millersylvania	170
Ocean City	182
Pacific Beach	64
Rainbow Falls	50
Schafer	42
Twin Harbors	301



Top Sources of Campers to Region *



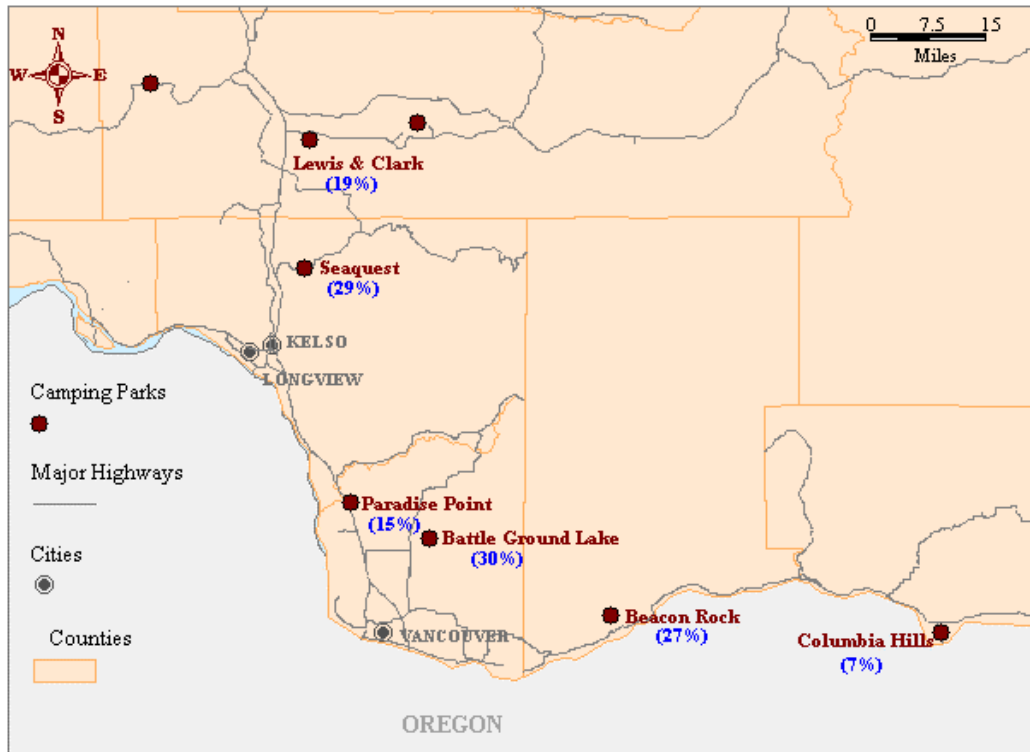
Washington Resident Sources of Campers to Region *



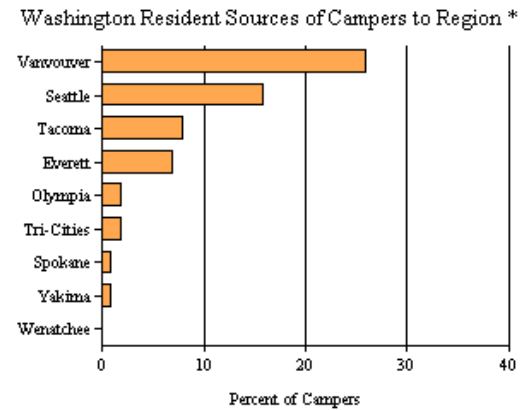
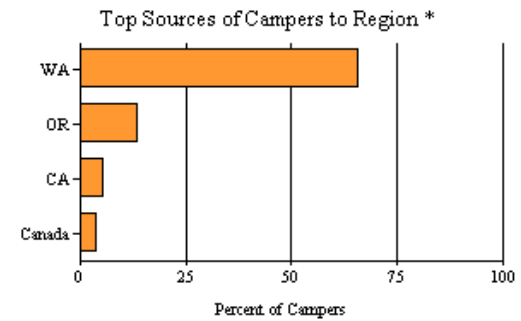
* Camper Origin based on Reservation Data, 2003

SOUTHWEST REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



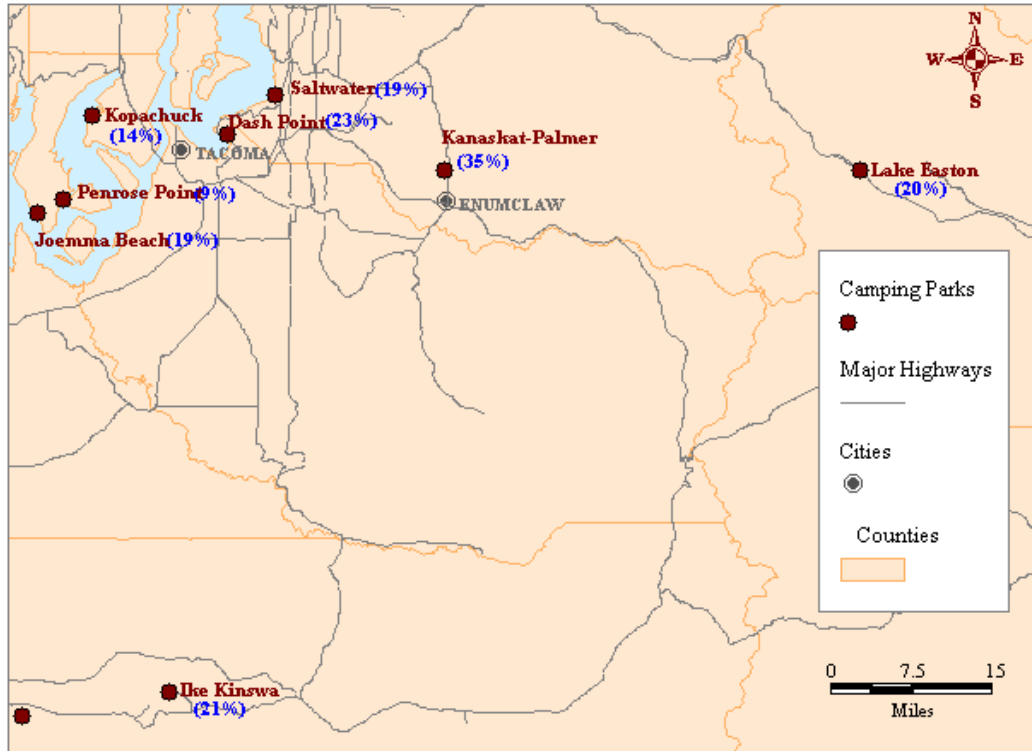
PARK	CAMPSITES
Battle Ground Lake	53
Beacon Rock	36
Columbia Hills	14
Lewis & Clark	25
Paradise Point	79
Seaquest	91



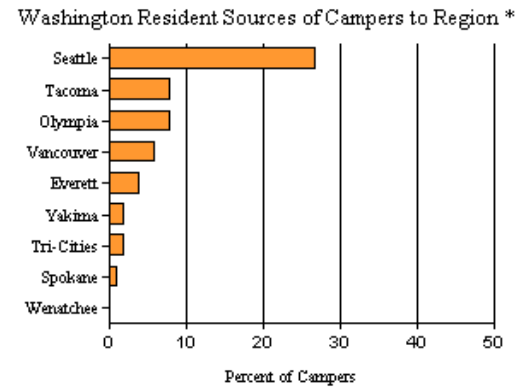
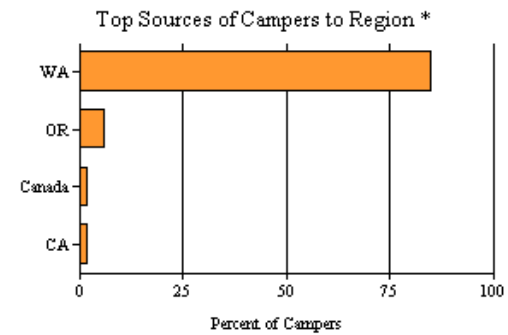
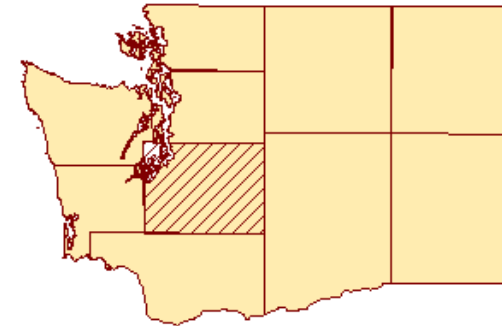
* Camper Origin based on Reservation Data, 2003

SOUTH PUGET SOUND REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



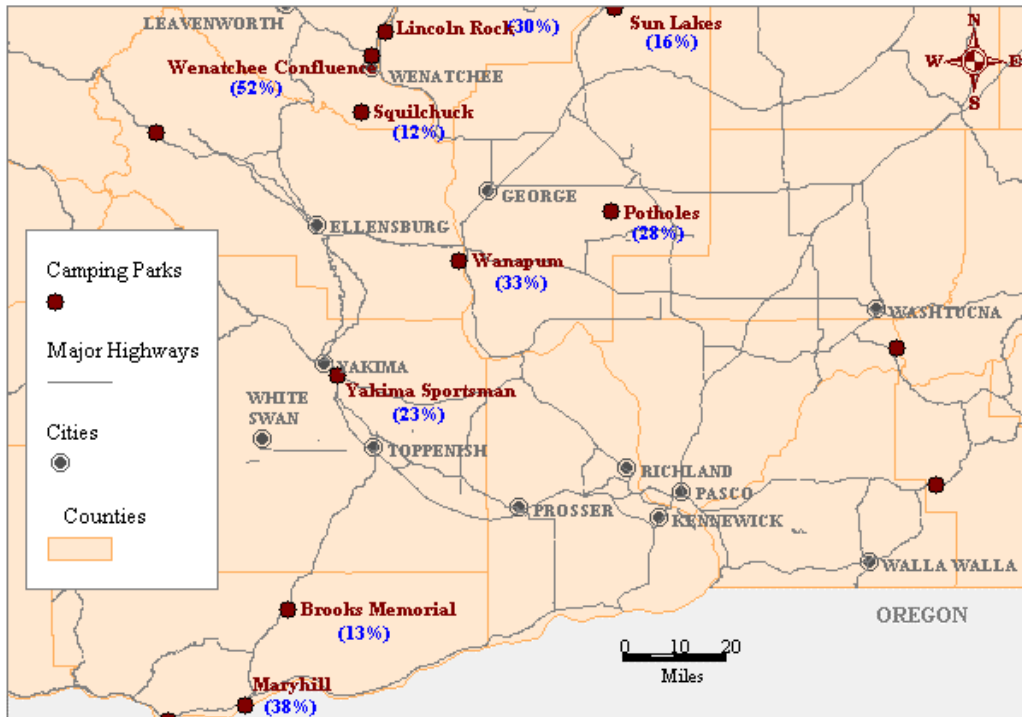
PARK	CAMPSITES
Dash Point	137
Ille Kinswa	101
Joemma Beach	19
Kanaskat-Palmer	52
Kopachuck	47
Lake Easton	138
Penrose Point	86



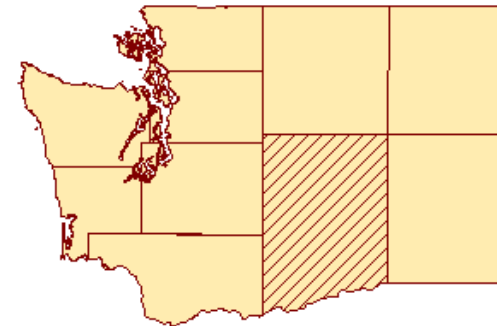
* Camper Origin based on Reservation Data, 2003

SOUTH CENTRAL REGION

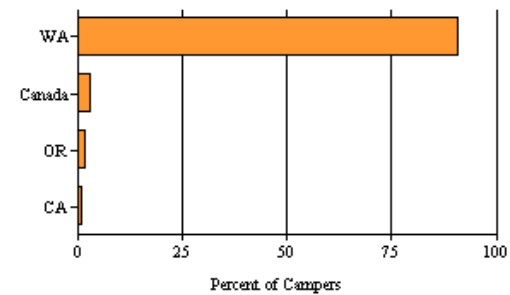
State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



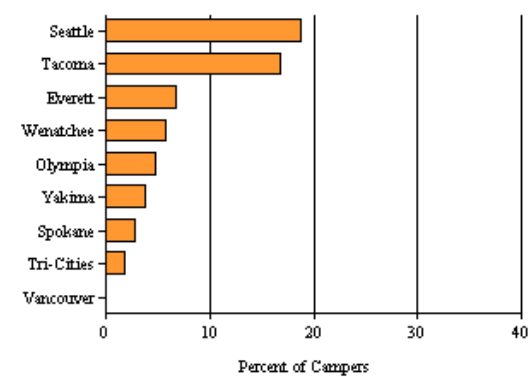
PARK	CAMPSITES
Brooks Memorial	47
Lincoln Rock	96
Maryhill	81
Potholes	120
Squilchuck	20
Sun Lakes	175
Wanapum	51
Wenatchee Confluence	71



Top Sources of Campers to Region *



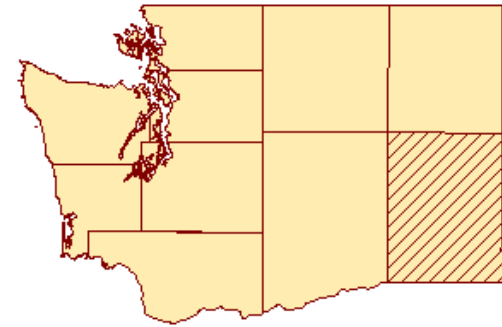
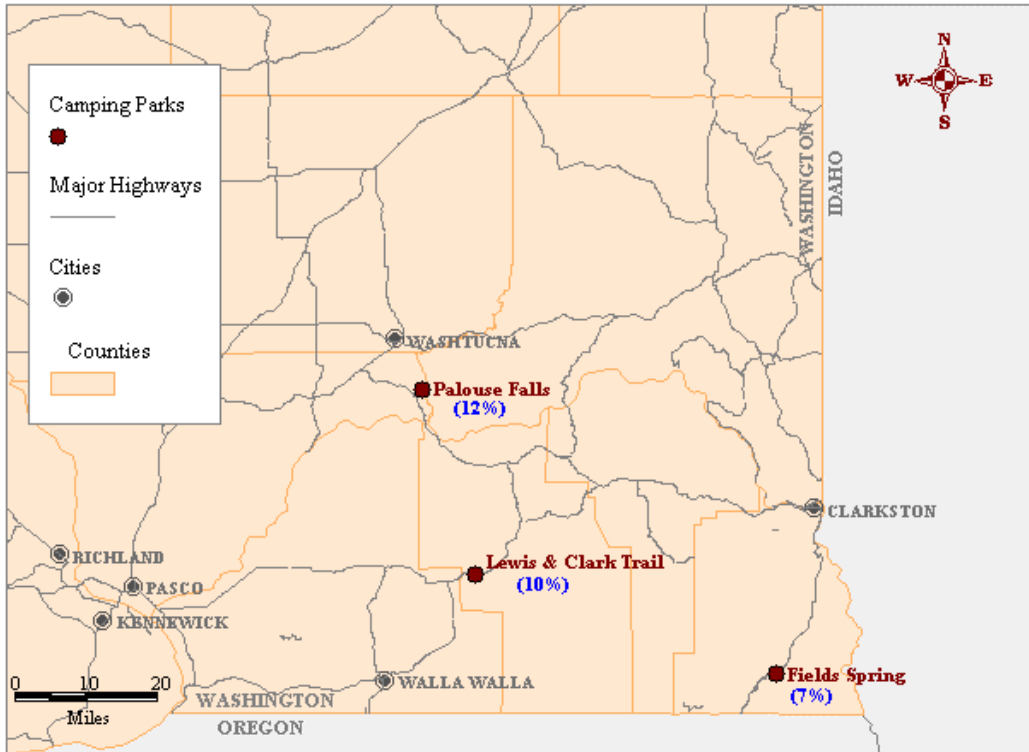
Washington Resident Sources of Campers to Region *



* Camper Origin based on Reservation Data, 2003

SOUTHEAST REGION

State Parks with Camping (Annual % Occupancy, Sep 03 - Aug 04)



Note: Visitor origin data is not available for state parks identified in this region.

PARK	CAMPSITES
Fields Spring	24
Lewis & Clark Trail	34
Palouse Falls	10

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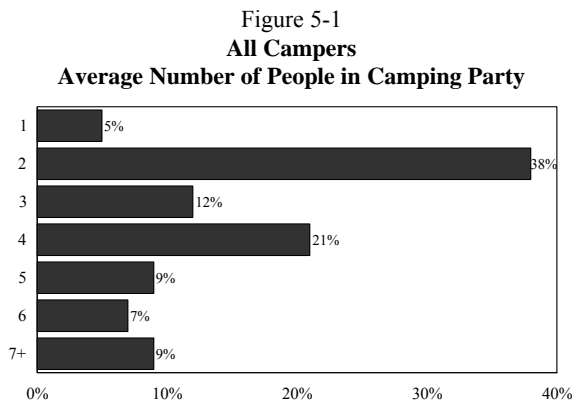
V. Profile of Washington State Park Campers

This section describes and compares selected characteristics, demographics, and preferences of Washington State Park campers and camping parties. In particular, those who camped one or more nights in a yurt, cabin, or platform tent (referred to as convenience campers) are compared to a sample of all campers to Washington State Parks. The findings presented in this section are based on the *Washington State Parks and Recreation Commission 1999 Convenience Camping Survey*, which was used to characterize yurt, cabin and platform tent campers, as well as statewide telephone survey of Washington State Parks users and non-users, and data provided by the Washington State Parks reservation system.

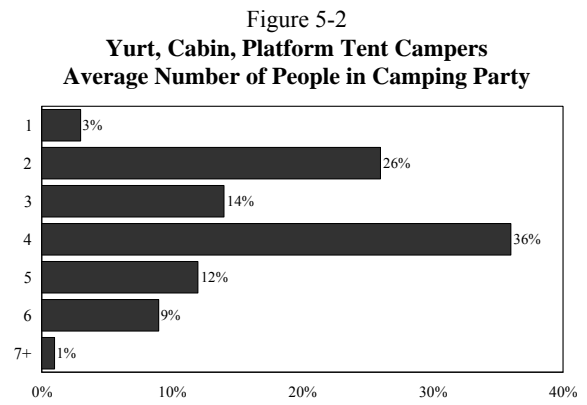
Camping Parties

1. Compared to all campers, those who camped in a yurt, cabin, or platform tent were more likely to camp in larger groups.

Among yurt, cabin, and platform tent campers, a group of four people was the most common size of camping parties. Among of all campers, camping parties of two were dominated. Percentage breakouts for the number of people in camping parties are shown in Figures 5-1 and 5-2.



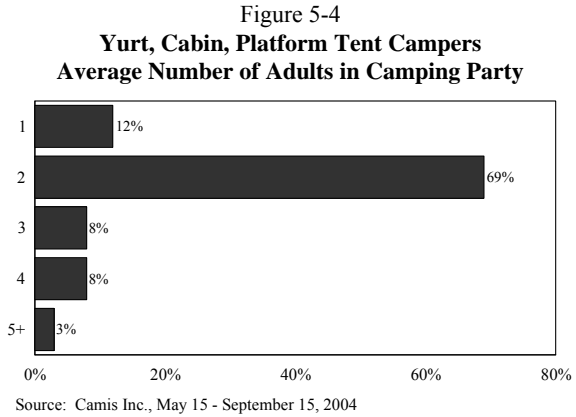
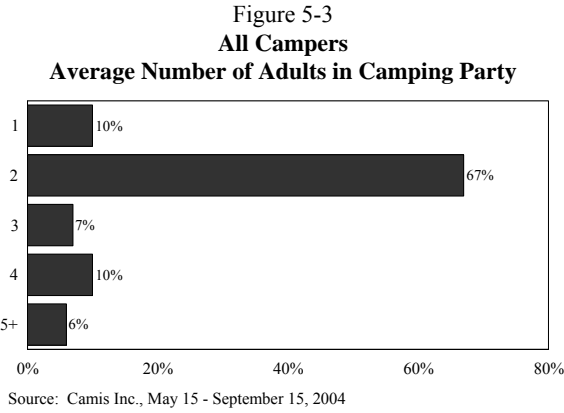
Source: Camis Inc., May 15 - September 15, 2004



Source: Camis Inc., May 15 - September 15, 2004

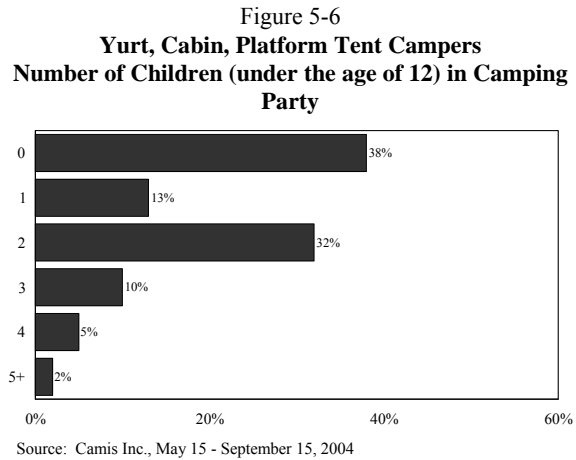
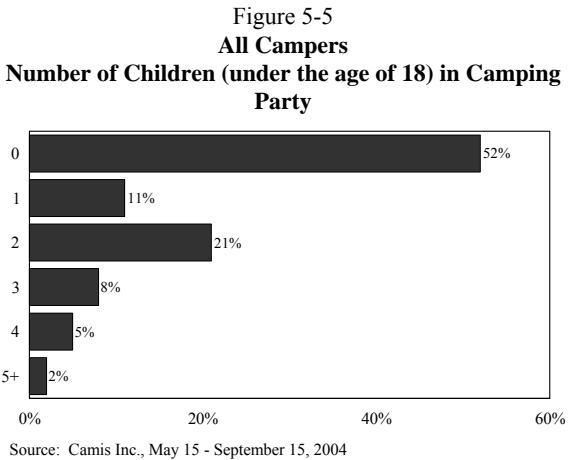
2. *Most camping parties had two or more adults.*

All campers and convenience campers were both similar in that about nine-out-of-ten camping parties had two or more adults. Specific percentage breakouts for adults in camping parties are summarized in Figures 5-3 and 5-4.



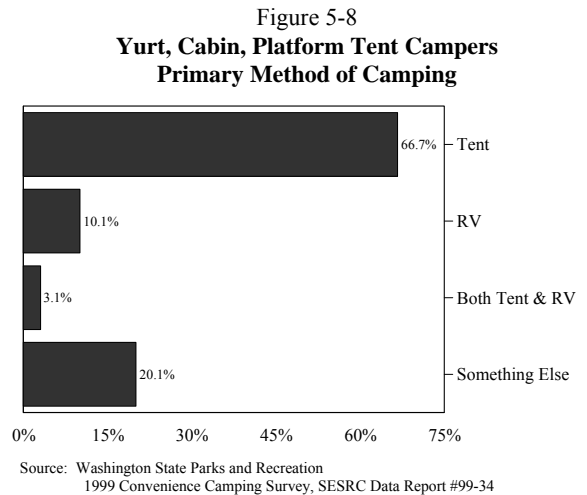
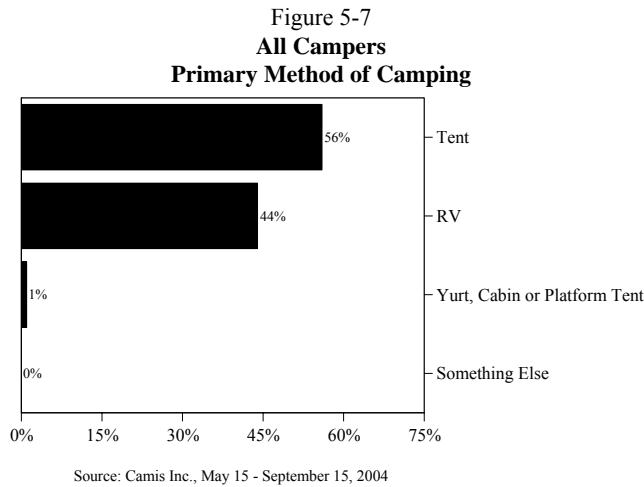
3. *Compared to all campers, those who camped in a yurt, cabin, or platform tent were more often with children.*

Among all campers, more than one-half (52%) camped without children. For those who camped in a yurt, cabin, and platform tent, children were present in more than three out of five camping parties. Percentage breakouts for children in camping parties are summarized in Figures 5-5 and 5-6.



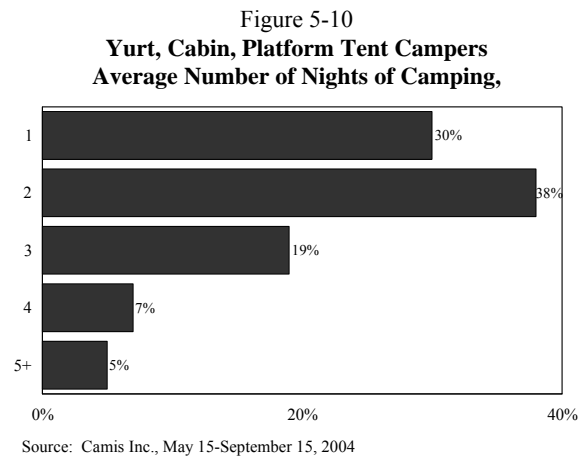
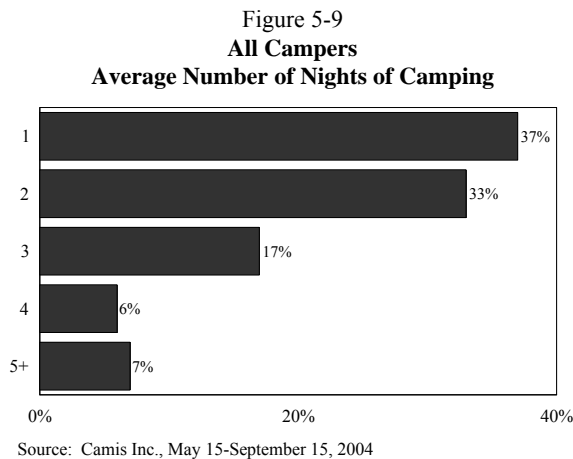
4. *Yurt, cabin, and platform tent campers are significantly less oriented to recreation vehicle (RV) camping as an alternative.*

Two-thirds of convenience campers (66.7%) usually use a tent to camp. As shown in Figures 5-7 and 5-8, just one-in-ten convenience campers usually camps with a RV, as compared to almost half of all campers (44.0%) who camp primarily with an RV.



5. *Compared to all campers, those who camped in a yurt, cabin, or platform tent are more likely to camp for two nights.*

Among all campers, one-third (33%) of camping parties camped for two nights, as compared to a slightly higher percentage of convenience campers (38%).

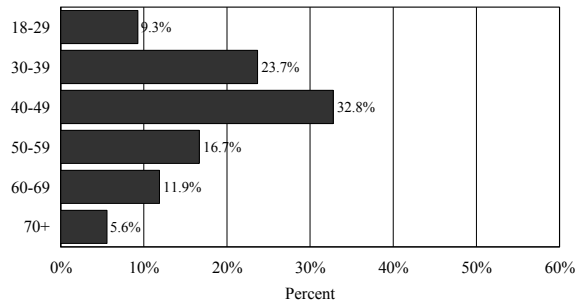


Demographic Characteristics

6. *As compared to all campers, convenience campers tend to be more middle aged.*

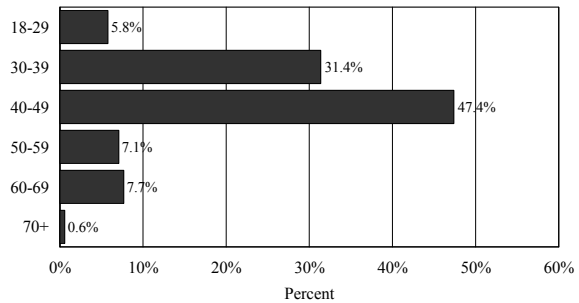
Approximately eight-in-ten (80%) of convenience campers were between 30-49 years of age, as compared to just over one-half of all campers (represents age of survey respondent). Among all campers, those in the younger (under 30 years) and empty-nest (over 50 years) age groups were more represented.

Figure 5-11
All Campers
Age of Adult Campers



Source: Reservations Northwest Users Survey, 1999
Oregon Survey Research Laboratory, University of Oregon

Figure 5-12
Yurt, Cabin, Platform Tent Campers
Age of Adult Campers

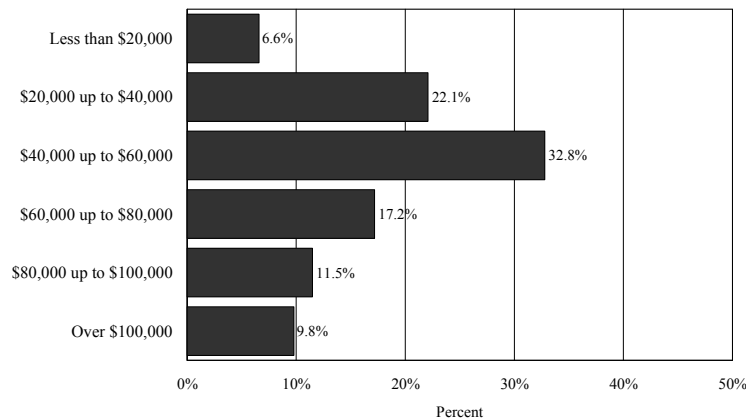


Source: Washington State Parks and Recreation
1999 Convenience Camping Survey, SESRC Data Report #99-34

7. *Overall, convenience campers are more representative of middle-income households.*

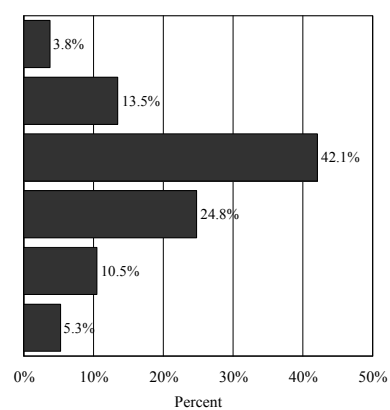
Compared to all campers, convenience campers are more representative of those households earning between \$40,000 to \$80,000 per year, as shown below in Figures 5-13 and 5-14.

Figure 5-13
All Campers
Annual Household Income



Source: Statewide Telephone Survey of Washington State Parks Users and Non-Users
SESRC Data Report #00-06

Figure 5-14
Yurt, Cabin, Platform Tent Campers
Annual Household Income

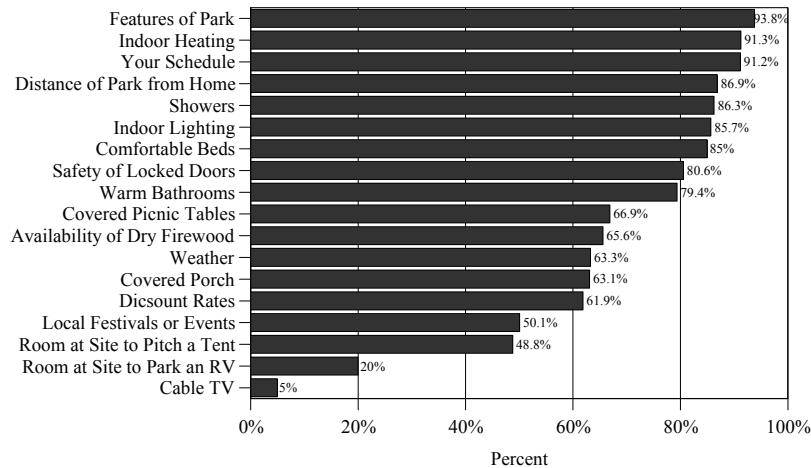


Source: Washington State Parks and Recreation
1999 Convenience Camping Survey
SESRC Data Report #99-34

Attitudes and Preferences

Respondents of the Convenience Camping Survey were asked to describe the degree of importance (from very important to very unimportant) of different amenities and features in selecting a campground during fall, winter and spring. Figure 5-15 shows the top responses for features and amenities identified as *either* very important or somewhat important by convenience campers. Features of the park itself, such as natural or historical resources, topped the list. Personal schedule and the distance of the park from home – both of which reflect travel time value and the park’s proximity to market areas of travel – were also among the most important. Among selected campground amenities, respondents identified indoor heating, showers, indoor lighting, comfortable beds, and safety locks as most important (as identified by more than 80% of respondents).

Figure 5-15
Yurt, Cabin, Platform Tent Campers
Degree of Importance, when deciding where to camp

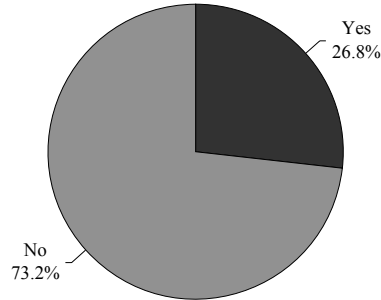


Source: Washington State Parks and Recreation
 1999 Convenience Camping Survey, SESRC Data Report #99-34

Respondents of the Convenience Camping Survey were also asked whether they would have camped without any convenience camping structure. As shown in Figure 5-16, nearly three-quarters (73.2%) indicated that if there were no yurt, cabin or platform tent available they would not have gone camping at that park on that date.

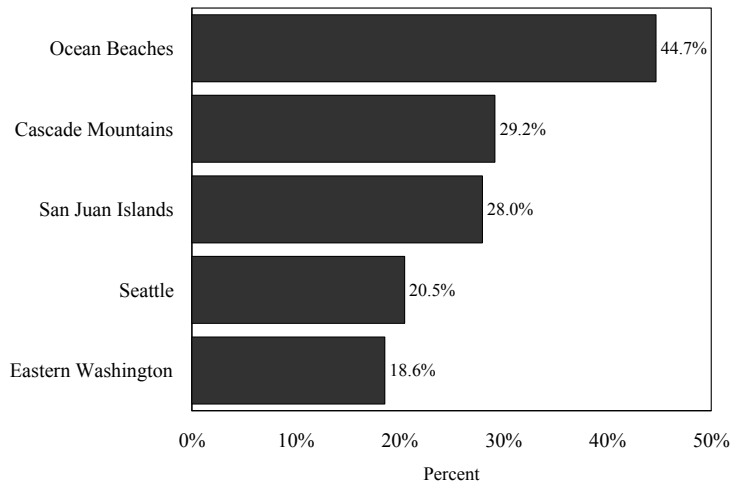
When questioned if additional yurts, cabins and platform tents were added to the Washington State Parks System, almost one-half (45%) of convenience campers identified Ocean Beaches as the most likely location to camp during fall, winter and spring months of the year. Cascade Mountains and San Juan Islands Regions were locations chosen by about 30 percent of respondents. About 20 percent indicated a preference for locations within an hour of metropolitan Seattle. Eastern Washington was identified as the least favorable destination for convenience camping during the non-summer seasons.

Figure 5-16
Yurt, Cabin, Platform Tent Campers
Would still camp (at this place and time) if no
convenience camping structure available at park?



Source: Washington State Parks and Recreation
 1999 Convenience Camping Survey, SESRC Data Report #99-34

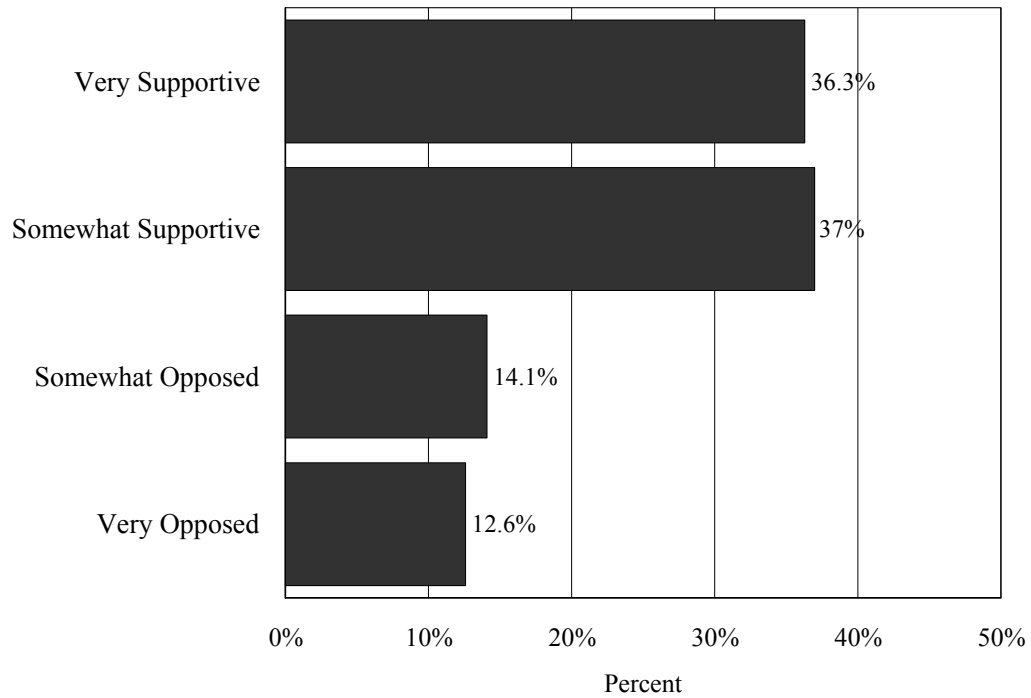
Figure 5-17
Yurt, Cabin, Platform Tent Campers
Most desirable locations during fall, winter, and spring



Source: Washington State Parks and Recreation
 1999 Convenience Camping Survey, SESRC Data Report #99-34
 Note: Total exceeds 100% due to multiple responses.

Results of the Statewide Telephone Survey of Washington State Park Users and Non-Users showed that availability of convenience camping structures are valued not only for convenience campers, but also for all campers. More than 70% of respondents (Figure 5-18) were very supportive or somewhat supportive of yurts, cabins or cabin-tents offered to campers in Washington State Parks.

Figure 5-18
Support or Oppose One-Room Yurt, Cabin or Cabin-Tent by Overnight Campers



Source: Statewide Telephone Survey of Washington State Parks Users and Non-Users
SESRC Data Report #00-06

Overview

Camping Characteristics

- Convenience campers tend to camp in larger groups as compared to all campers in general.
- Convenience campers and all campers are similar in terms of camping parties, with two adults as the most common party size.
- Convenience campers are more likely to camp with children as compared to all campers.
- Convenience campers are more oriented to tent camping and less so to camping with an RV, as compared to all campers.
- Convenience campers tend more often to camp two or more nights, as compared to all campers.

Demographic Characteristics

- Convenience campers are more often middle-aged (30-49 years of age) as compared to all campers.
- Convenience campers are more representative of middle-income households (household income between \$40,000 and \$60,000 per year), as compared to all campers.

Attitudes and Preferences

- “Features of the Park”, such as natural and historical resources, was identified as the most important factor in selecting a location to camp. Distance of the Park from Home and Schedule were also included among the top answers.
- Nearly three-quarters of convenience campers would not have camped if no convenience camping structure were available.
- Ocean Beaches, Cascade Mountain, and San Juan Islands were identified as the most desirable locations for convenience camping during fall, winter and spring.
- More than 70 percent of all campers support to some extent additional convenience camping structures in Washington State Parks.

VI. State Park Assessment and Evaluation

This section describes the evaluation criteria and ranking used to assess Washington state parks most appropriate for future yurt and cabin development. Evaluation criteria are based on a broad range of market-demand factors important for camping and outdoor recreation. The findings described in this assessment are intended as preliminary and exemplary. Final site selection will warrant a more rigorous evaluation within the context of the identified criteria as well as the potential for additional and/or revised information pertinent to yurt and cabin development.

Based on the following site evaluation criteria, this location assessment serves as an example of a methodological procedure intended to identify Washington state parks most desirable for yurt and cabin development.

Site Evaluation Criteria

- Proximity to Primary Markets: evaluates the park's location and proximity with respect to distance and travel time to the primary sources of campers to Washington State Parks.
- Capacity and Demand: evaluates the size and the adequacy of the campgrounds to accommodate the development needs and areas most suited for construction of facilities.
- Features of Park: evaluates the physical conditions of the park and important natural landmarks or features with regard to location that would most enhance the quality of the camper's experience.
- Campground Amenities: evaluates campground amenities with regard to restrooms, picnic areas and group sites.
- Seasonal Restrictions: evaluates the seasonal campground use and variation, particularly with respect to demand for yurts and cabins.

Method of Ranking

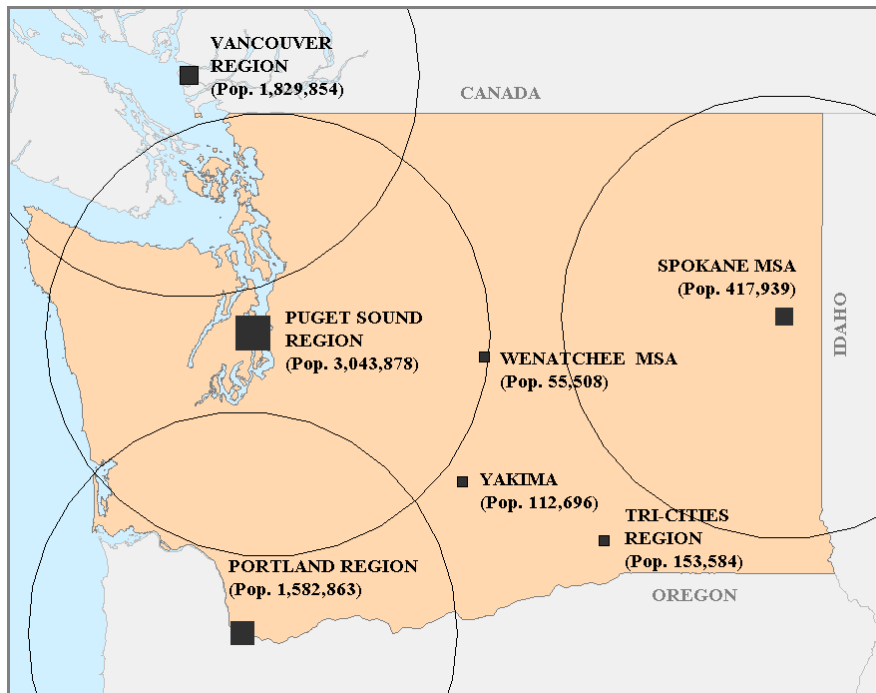
Each Washington state park with a campground was evaluated based on the above criteria and ranked between 1 and 3 depending on the degree to which the campground would support yurt and cabin development (detailed rankings appear in Appendices B-1 – B-6). Ranked scores were weighted (by a factor of 2) in order to reflect criteria identified by yurt and cabins users as inherently more important when making decisions about where to camp: Proximity to Primary Markets and Features of the Park. This method of ranking is intended to establish the parks of highest priority for yurt and cabin development.

Evaluation scores across all criteria were totaled to determine an overall score and establish a relative measure of recreation value for potential yurt and cabin campers. Based on these criteria, Washington state parks were identified as the most desirable in which to expand the current yurt and cabin rental program.

Proximity to Primary Markets

In the previous Section, sources of campers to Washington state parks were summarized in terms of market-demand areas. Based on these findings, four market-demand areas were identified as the primary sources of campers (Puget Sound Region, Portland Region, Vancouver, B.C. Region, and Spokane MSA). Subsequently, Washington state parks were identified with respect to those that fell within a 100-mile radius of each primary market-demand area. In general, these are the state parks located no more than approximately two hours travel time from a market-demand area (in some cases due to ferry schedules, traffic flow, and/or international border crossings, travel time will exceed two hours). As illustrated in Figure 6-1, to a certain extent, the 100-mile radius areas overlap, resulting in a number of Washington state parks identified as located within relatively close proximity of two primary market-demand areas.

Figure 6-1
Sources of Campers to Washington State Parks



Source: U.S. Census Bureau

Note: Puget Sound Region represents King, Pierce and Snohomish Counties

Portland Region represents Portland WA-OR Urbanized Area

Tri-Cities Region represents Kennewick-Richland Urbanized Area

In terms of the criterion *Proximity to Primary Markets*, those parks located within a 100-mile radius of two market-demand areas received a rank of three (3), within a single market-demand area a rank of two (2), and those which did not fall within a 100-mile radius of a primary market-demand area received a rank of one (1). For each market-demand area, Figures 6-2 – 6-5 show Washington state parks located within a 100-mile radius (See Appendix B-1 for corresponding rank).

Figure 6-2
Puget Sound Region
Washington State Parks within 100-mile radius

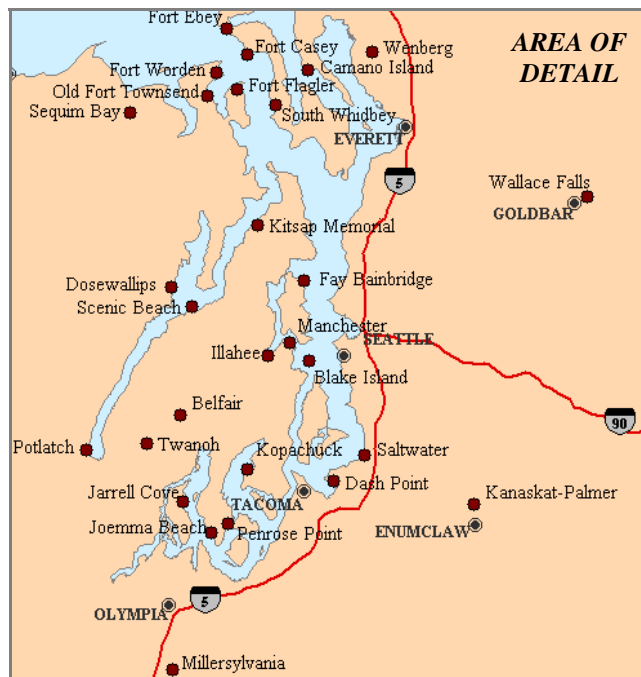
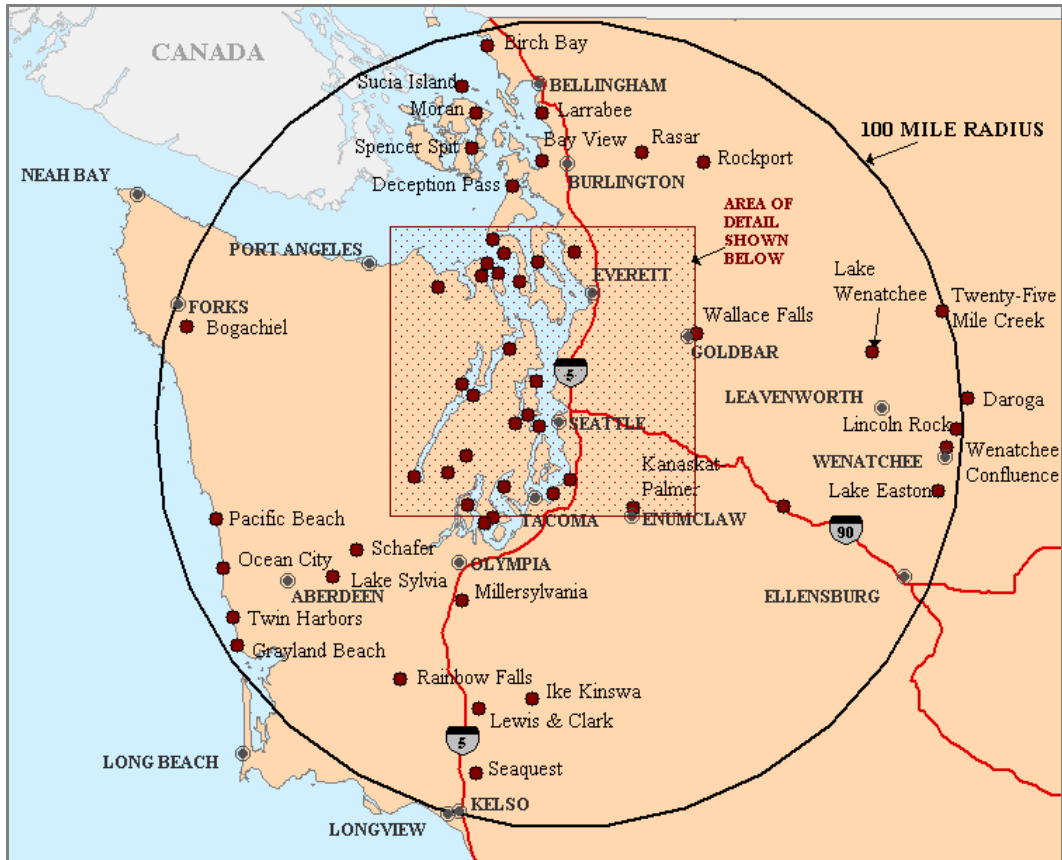


Figure 6-3
Vancouver, B.C. Region
Washington State Parks within 100-mile radius



Figure 6-4
Spokane MSA
Washington State Parks within 100-mile radius

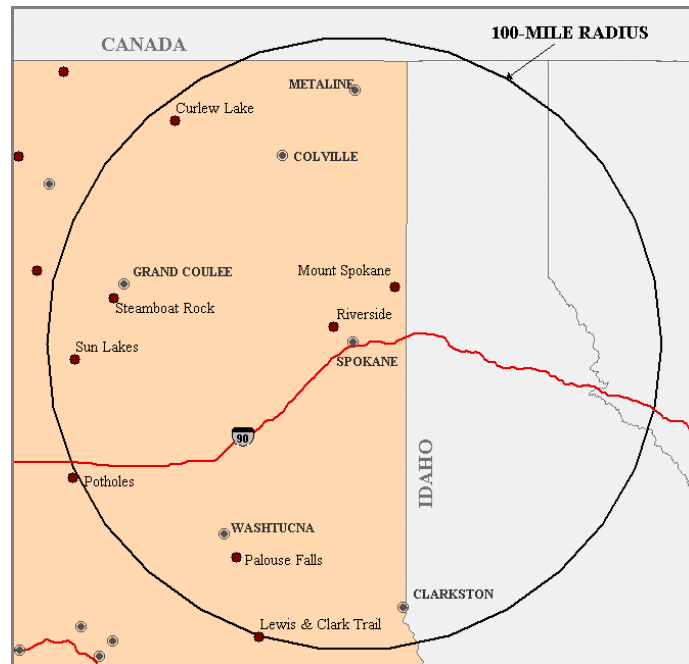


Figure 6-5
Portland Region
Washington State Parks within 100-mile radius



Capacity and Demand

In term of the criterion *Capacity and Demand*, Washington State Parks were ranked separately based on the number of campsites available at the Park and their average annual occupancy rate:

- Parks that have at least 100 campsites received a rank of three (3), parks with from 50 to 99 campsites received a rank of two (2), and parks that have fewer than 50 campsites received a rank of one (1).
- Parks with an occupancy rate of at least 20% received a rank of three (3), parks with an occupancy rate between 15% and 20% received a rank of two (2), and parks with occupancy rates less than 15% received a rank of one (1).

Table (Appendix B-2) shows a list of all Washington State Parks with campgrounds, ranked by capacity; and a second table (Appendix B-3) shows the list of the same state parks, ranked by demand.

Features of the Park

In terms of the criterion *Features of the Park*, Washington State Parks were ranked based on the number of selected features of the Park which are most attractive for campers. Features of the Parks included camping opportunities, waterfront, recreation boating/fishing, outdoor recreation trails, historical displays/museums, scenic views, wildlife viewing/bird watching, beach walking, and organized sport activities/events.

Parks that have at least six of the features described above earned a rank of three (3), parks with 5 features received a rank of two (2), and parks with less than 5 features received a rank of one (1). The table in Appendix B-4 shows a list of the ranked state parks with corresponding rank for features of the park criterion.

Campground Amenities

In terms of the *Campground Amenities* criterion, Washington State Parks were ranked based on the number of available campground amenities. The list of the selected amenities included picnic tables, group campsites, dump stations, access for people with disabilities, utility spaces, restrooms, showers, kitchen shelters, and visitor/education centers.

Those Washington State Parks that have at least 8 of the amenities described above received a rank of three (3), parks with 7 amenities received a rank of two (2) and parks with less than 7 amenities received a rank of one (1). The table in Appendix B-5 shows the details of campground amenities ranking.

Seasonal Restrictions

In terms of the *Seasonal Restrictions* criterion, Washington State Parks were ranked based on the extent to which the park remains open for seasonal use. Those parks that are opened year-round, received a rank of three (3). Parks that are opened year-round but have some campsites closed during winter received a rank of two (2). Parks that are closed during some period of the year received a rank of one (1). The table in Appendix B-6 shows a list of the ranked state parks with corresponding rank for seasonal restrictions.

Overall Assessment

Based on the overall assessment of site evaluation criteria (found in Appendix C), a number of Washington state parks were identified as most desirable for future development of yurts and cabins (see Table 6-1 and Figure 6-6). Each of the most desirable state parks is located within 100-miles of a primary market-demand area, and each (as indicated by average annual occupancy and the number of campsites) has strong demand for, and current use of, the existing campground facilities. The features of these parks offer the highest value in terms of natural and historical resources. In addition, these parks offer the greatest potential to provide high-quality recreational experiences for visitors, helping to enhance overall visitation – particularly during the shoulder season months of the year.

Subsequently, the selection of most desirable Washington state parks was evaluated with respect to the potential to support four proposed strategies, all of which could potentially generate additional revenue, provide new visitor services, diversify the Commission’s funding base, and improve economic self-sufficiency:

1. Enhance shoulder season
2. Serve primary market areas
3. Promote natural/historical features
4. Encourage statewide tourism

In Table 6-1, the most desirable state parks were identified according to their potential to support each of the proposed strategies. All of the most desirable state parks strongly supported either two or more of the proposed strategies, an indication that any potential trade-offs between strategies appears to be minimal, and to some degree, four strategies can be supported by yurt and cabin development at these parks.

Figure 6-6
**Washington State Parks with
 Most Desirable for Yurt and Cabin Development**



Table 6-1
**Priority Value among Washington State Parks
Most Desirable for Yurt and Cabin Development**

	Proposed Strategies				Development Priority
	Enhance Shoulder Season	Serve Primary Market Areas	Promote Natural/Historical Features	Encourage Statewide Tourism	
Battle Ground Lake	●		●	●	Extremely Important
Birch Bay		●	●	●	Extremely Important
Cape Disappointment	●		●	●	Extremely Important
Deception Pass		●	●	●	Extremely Important
Fort Casey	●	●	●		Extremely Important
Fort Ebey	●	●	●		Extremely Important
Grayland Beach	●		●	●	Extremely Important
Illahee	●		●	●	Extremely Important
Millersylvania	●	●		●	Extremely Important
Moran		●	●	●	Extremely Important
Ocean City	●		●	●	Extremely Important
Rasar		●	●	●	Extremely Important
Sequest	●	●		●	Extremely Important
Sequim Bay		●	●	●	Extremely Important
Steamboat Rock	●		●	●	Extremely Important
Camano Island		●	●		Moderately Important
Dosewallips	●			●	Moderately Important
Fort Flagler		●	●		Moderately Important
Fort Worden		●	●		Moderately Important
Manchester	●		●		Moderately Important
South Whidbey		●	●		Moderately Important
Spencer Spit		●	●		Moderately Important
Sun Lakes	●			●	Moderately Important
Wenatchee Confluence	●			●	Moderately Important

● Signifies high potential to enhance proposed strategy.

VII. Financial Analysis

This section presents a preliminary financial analysis for the potential development of yurts and cabins within Washington state parks. This analysis is intended to illustrate the potential revenue and costs associated with an additional 150 yurts and cabins constructed in Washington state parks – 75 units in fiscal year 2006 and 75 units in fiscal year 2007. The analysis provides cash flow projections and the annual returns on investment over a period of 20 years.

This financial analysis considers all operating and administrative expenses as well as costs associated with debt service and a replacement reserve fund (equal to 10% of gross revenue). Examples of two cash flow scenarios are presented: Table 7-2 illustrates a scenario in which the additional 150 yurts and cabins are developed on existing utility campsites, which reflects an adjustment in net revenue to account for an associated loss in campsite rental fees for a period of sixty days. Table 7-3 illustrates a scenario in which the additional 150 yurts and cabins are developed on new campsites. Other specific revenue and cost assumptions that underlie projected cash flows appear in Table 7-1 below.

Table 7-1
Assumed Rental Rates, Annual Occupancy, and Years to Payoff

Revenue and Cost Factors:				
Yurt/Cabin Rental Rate (per night)		\$40		
Average Annual Occupancy				
May - Sept.		83%		
Oct. - Apr.		33%		
Operating and Admin. Costs:				
Cleaning/Supply/Utility Cost (per rental day)		\$6		
Marketing/Overhead (percent of gross revenue)		10%		
Replacement Reserve (percent of gross revenue)		10%		
Inflation Adjustment (annual)		3%		
	Cost for	Capital Cost--Net Present Value	Payback Period	Amortiz'n for
<u>Capital Cost (turn-key):</u>	<u>(1 unit)</u>	<u>(150 units)</u>	<u>(years)</u>	<u>150 units</u>
New campsite:	\$25,000	\$3,791,095	7	\$451,000
Existing campsite:	\$20,000	\$3,032,876	7	\$360,800
<i>Financial terms: 10 yrs, 3.5%</i>				

Source: Dean Runyan Associates

Table 7-2

Built on Existing Campsites (75 units in FY 2006 and 75 units in FY2007)

Category	Year									
	1	2	3	4	5	6	7	8	9	10
Revenue:										
Yurt/Cabin Rentals [Med Range]	\$590,000	\$1,214,000	\$1,251,000	\$1,288,000	\$1,327,000	\$1,367,000	\$1,408,000	\$1,450,000	\$1,494,000	\$1,538,000
Less: Campsite Revenue	<u>(\$99,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>	<u>(\$198,000)</u>
Net Additional Revenue	\$491,000	\$1,016,000	\$1,053,000	\$1,090,000	\$1,129,000	\$1,169,000	\$1,210,000	\$1,252,000	\$1,296,000	\$1,340,000
Expenses:										
Administration	\$59,000	\$121,400	\$125,100	\$128,800	\$132,700	\$136,700	\$140,800	\$145,000	\$149,400	\$153,800
Operating	\$91,700	\$188,900	\$194,600	\$200,400	\$206,400	\$212,600	\$219,000	\$225,600	\$232,300	\$239,300
Debt Service	<u>\$180,400</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>	<u>\$360,800</u>
Total Expenses	\$331,100	\$671,100	\$680,500	\$690,000	\$699,900	\$710,100	\$720,600	\$731,400	\$742,500	\$753,900
Net Operating Revenue	\$159,900	\$344,900	\$372,500	\$400,000	\$429,100	\$458,900	\$489,400	\$520,600	\$553,500	\$586,100
less: Replacement Reserve	(59,000)	(121,400)	(125,100)	(128,800)	(132,700)	(136,700)	(140,800)	(145,000)	(149,400)	(153,800)
Net Income	<u>\$100,900</u>	<u>\$223,500</u>	<u>\$247,400</u>	<u>\$271,200</u>	<u>\$296,400</u>	<u>\$322,200</u>	<u>\$348,600</u>	<u>\$375,600</u>	<u>\$404,100</u>	<u>\$432,300</u>

Net Present Value
10 year period 20 year period

Cost of Capital (shown as debt service)	\$2,902,552	\$3,032,876
Net Operating Revenue (without Replacement Reserve)	\$3,600,315	\$10,564,115
Net Income (with Replacement Reserve)	\$2,512,836	\$8,331,866
<u>Annual Return on Investment</u> without Replacement Reserve	2.2%	6.4%
<u>Annual Return on Investment</u> with Replacement Reserve	-1.4%	5.2%

Note: Inflation and discount rates calculated at 3.0%.

Table 7-2 (continued)

Built on Existing Campsites (75 units in FY 2006 and 75 units in FY2007)

Category	11	12	13	14	15	16	17	18	19	20
Revenue:										
Yurt/Cabin Rentals [Med Range]	\$1,585,000	\$1,632,000	\$1,681,000	\$1,732,000	\$1,783,000	\$1,837,000	\$1,892,000	\$1,949,000	\$2,007,000	\$2,068,000
Less: Campsite Revenue	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>	<u>(\$225,000)</u>
Net Additional Revenue	\$1,360,000	\$1,407,000	\$1,456,000	\$1,507,000	\$1,558,000	\$1,612,000	\$1,667,000	\$1,724,000	\$1,782,000	\$1,843,000
Expenses:										
Administration	\$158,500	\$163,200	\$168,100	\$173,200	\$178,300	\$183,700	\$189,200	\$194,900	\$200,700	\$206,800
Operating	\$246,500	\$253,900	\$261,500	\$269,300	\$277,400	\$285,800	\$294,300	\$303,200	\$312,200	\$321,600
Debt Service	<u>\$180,400</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
Total Expenses	\$585,400	\$417,100	\$429,600	\$442,500	\$455,700	\$469,500	\$483,500	\$498,100	\$512,900	\$528,400
Net Operating Revenue	\$774,600	\$989,900	\$1,026,400	\$1,064,500	\$1,102,300	\$1,142,500	\$1,183,500	\$1,225,900	\$1,269,100	\$1,314,600
less: Replacement Reserve	(158,500)	(163,200)	(168,100)	(173,200)	(178,300)	(183,700)	(189,200)	(194,900)	(200,700)	(206,800)
Net Income	<u>\$616,100</u>	<u>\$826,700</u>	<u>\$858,300</u>	<u>\$891,300</u>	<u>\$924,000</u>	<u>\$958,800</u>	<u>\$994,300</u>	<u>\$1,031,000</u>	<u>\$1,068,400</u>	<u>\$1,107,800</u>

Note: Inflation and discount rates calculated at 3.0%.

Table 7-3

Built on New Campsites (75 units in FY 2006 and 75 units in FY2007)

Category	Years									
	1	2	3	4	5	6	7	8	9	10
Revenue:										
Yurt/Cabin Rentals (Med Range)	\$590,000	\$1,214,000	\$1,251,000	\$1,288,000	\$1,327,000	\$1,367,000	\$1,408,000	\$1,450,000	\$1,494,000	\$1,538,000
Expenses:										
Administration	\$59,000	\$121,400	\$125,100	\$128,800	\$132,700	\$136,700	\$140,800	\$145,000	\$149,400	\$153,800
Operating	\$91,700	\$188,900	\$194,600	\$200,400	\$206,400	\$212,600	\$219,000	\$225,600	\$232,300	\$239,300
Debt Service	<u>\$225,500</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>	<u>\$451,000</u>
Total Expenses	\$376,200	\$761,300	\$770,700	\$780,200	\$790,100	\$800,300	\$810,800	\$821,600	\$832,700	\$844,100
Net Operating Revenue	\$213,800	\$452,700	\$480,300	\$507,800	\$536,900	\$566,700	\$597,200	\$628,400	\$661,300	\$693,900
less: Replacement Reserve	(59,000)	(121,400)	(125,100)	(128,800)	(132,700)	(136,700)	(140,800)	(145,000)	(149,400)	(153,800)
Net Income	<u>\$154,800</u>	<u>\$331,300</u>	<u>\$355,200</u>	<u>\$379,000</u>	<u>\$404,200</u>	<u>\$430,000</u>	<u>\$456,400</u>	<u>\$483,400</u>	<u>\$511,900</u>	<u>\$540,100</u>
Net Present Value										
	<u>10 year period</u>	<u>20 year period</u>								
Cost of Capital (Cost of Debt Service)	\$3,628,189	\$3,791,095								
Net Operating Revenue	\$4,467,540	\$12,826,896								
Net Income	\$3,380,062	\$10,594,647								
<u>Annual Return on Investment</u> without Replacement Reserve	2.1%	6.3%								
<u>Annual Return on Investment</u> with Replacement Reserve	-0.7%	5.3%								

Note: Inflation and discount rates calculated at 3.0%.

Table 7-3 (continued)
Built on New Campsites (75 units in FY 2006 and 75 units in FY2007)

Category	Years									
	11	12	13	14	15	16	17	18	19	20
Revenue:										
Yurt/Cabin Rentals (Med Range)	\$1,585,000	\$1,632,000	\$1,681,000	\$1,732,000	\$1,783,000	\$1,837,000	\$1,892,000	\$1,949,000	\$2,007,000	\$2,068,000
Expenses:										
Administration	\$158,500	\$163,200	\$168,100	\$173,200	\$178,300	\$183,700	\$189,200	\$194,900	\$200,700	\$206,800
Operating	\$246,500	\$253,900	\$261,500	\$269,300	\$277,400	\$285,800	\$294,300	\$303,200	\$312,200	\$321,600
Debt Service	<u>\$225,500</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
Total Expenses	\$630,500	\$417,100	\$429,600	\$442,500	\$455,700	\$469,500	\$483,500	\$498,100	\$512,900	\$528,400
Net Operating Revenue	\$954,500	\$1,214,900	\$1,251,400	\$1,289,500	\$1,327,300	\$1,367,500	\$1,408,500	\$1,450,900	\$1,494,100	\$1,539,600
less: Replacement Reserve	(158,500)	(163,200)	(168,100)	(173,200)	(178,300)	(183,700)	(189,200)	(194,900)	(200,700)	(206,800)
Net Income	<u>\$796,000</u>	<u>\$1,051,700</u>	<u>\$1,083,300</u>	<u>\$1,116,300</u>	<u>\$1,149,000</u>	<u>\$1,183,800</u>	<u>\$1,219,300</u>	<u>\$1,256,000</u>	<u>\$1,293,400</u>	<u>\$1,332,800</u>

Note: Inflation and discount rates calculated at 3.0%.

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Appendix A

Literature Review – State Park Recreation and Camping Trends

“Convenience Camping Structures Investigation for Washington State Parks” by Brian Hovis, in cooperation with team members Tom Oliva and Don Powell

This report is based on many sources of data, including Washington and Oregon State Parks’ surveys, interviews with Oregon and Washington State Park staffs, occupancy rate statistics with an emphasis on convenience camping structures – particularly yurts. Recommendations provided good insights on installation of new convenient camping structures within Washington State Parks.

Here are highlights from the report:

- Convenience camping structures should be placed in year-round parks, which are likely to attract shoulder-season campers
- Convenience camping structures should be installed within an hour’s drive of urban areas with the greatest number of potential customers.
- The Report recommended installation of both cabins and yurts units within State Parks.
- The Report recommended the installation of simpler units at the beginning to place greater number of units at less cost, and then gradual installation of camping structures with different levels of convenience, including deluxe units, perhaps with bathroom and kitchen facilities.
- The Report recommended installation of between three and five convenience camping structures at each of the selected parks, with available and accessible utilities, to decrease operational impacts and to increase product recognition.
- Convenience camping structures at Oregon ocean beach state parks are doing particularly well. This fact may be considered in comparison of different state parks as candidates for installation of new convenience camping structures.
- Conversion of some existing campsites (particularly standard or primitive sites) may be the best strategy for utilizing the available funding.

“Campers in California: Travel Patterns and Economic Impacts” by Dean Runyan Associates (July 2000)

This study of camping in California provides a comprehensive profile of camping travel patterns, camping activities, travel spending patterns and demographics of campers. This study builds upon a July 1994 study of the same title also prepared by Dean Runyan Associates. This report describes 1999-2000 original camping data collected from campers throughout the state of California, and summarizes and interprets results for campers who stayed overnight. Here are some findings from the study, which helped to better understand future demand for yurt/cabin camping.

- *More than eight out of ten campers became interested in camping and spending time outdoors as children.*
- *First camping experiences were usually in a tent, RV or trailer.*
- Over half of all campers were with parents on their first camping trip.
- Friends and parents have greatly influenced campers' interests in camping and spending time outdoors.
- Most camping parties traveled less than 300 miles to reach their camping destinations.
- Over half of National Park and State Parks users prefer automobiles or trucks with tents to travel to the campground.
- Nearly half of all campers reported bringing no additional equipment along on camping trips.
- California campers are predominantly empty nesters and retired people.
- Camping in California is an activity primarily participated in by relatively affluent, well-educated people.

The National Park Service Comprehensive Survey of the American Public: Pacific West Region Technical report (August 2002)

This Report is one of seven regional technical reports, produced from the findings of a national survey of the American public, conducted by the United States National Park Service and the Social Research Laboratory of Northern Arizona University. Information in this Report reflects the attitudes, opinions, interests and visitation patterns of a representative sample of adults. Information drawn from the Pacific West Region (California, Hawaii, Idaho, Nevada, Oregon, Washington and the islands of the outer Pacific) reflects information from residents of the regional population, rather than from visitors to the parks within those specific regions.

Here are some results of the survey, which were useful in the understanding of overnight trends among campers in Washington State as one of the states of the Pacific West Region:

- Over two-thirds (72%) of respondents in the Pacific West Region visited at least once in their lifetime, and about 40% visited within 2 last years, a national park, historic or cultural site, monument or other unit managed by the National Park Service. About two-thirds (68%) of the general public and 87% of recent visitors may visit any National Park unit within the next year.
- One-third (33%) of visitors from the Pacific West Region were camping at a National Park Service Campground on their last visit, and 13 percent of visitors went overnight backpacking.
- More than half of the general public and recent visitors agreed to some degree that they might visit the National Park units more often if hotel/food costs were lower and if the Parks themselves were not so crowded.

“Public Opinions and Attitudes on Outdoor Recreation in California 1997”, the California Outdoor Recreation Planning Program (March 1998)

This Report is based on results from a focused public opinion survey, undertaken by the California Department of Parks and Recreation in 1997. 2,010 California households were selected at random to represent a sample of the state population.

Here are some findings from the 1997 Survey:

- Californians considered camping in developed and primitive sites to be one of the nine top outdoor recreational activities that should have priority for the expenditure of public funds, based on unmet demand and public support.
- Californians tend to want more campgrounds and fewer commercial businesses within public parks.
- 51.8% of the survey’s respondents indicated that they were camping for one or more days in developed sites with a tent or vehicle, and 25.8% of respondents were camping in primitive areas and backpacking at least once in 1997.
- Respondents have a high willingness to pay for camping in both developed and primitive sites.
- More than one third of respondents strongly agree that they’d like to see construction of more simple campgrounds with picnic tables, cold water and restrooms, as well as construction of more campgrounds that are intensely developed, with hot showers and/or electrical and water hook-ups as improvements in park and recreational facilities and services.
- There is growing support for increased facility maintenance and increased construction of new facilities in comparison with the 1987 and 1992 studies.

“Oregon Outdoor Recreation Plan 1994-1999”, Oregon Parks and Recreation Department (December 1994)

This Statewide Comprehensive Outdoor Recreation Plan is a part of a national program to assist state and local governments with acquisition and development of outdoor recreation areas and facilities.

- A statewide survey was conducted in 1993 to examine Oregon recreational participation and assess current needs. According to the survey, about one third of respondents (30%) were tent camping (without a camper or motorhome) at primitive or semi-primitive sites, and about half of residents (49.7%) would prefer to participate in the same activities. Crowded facilities were cited as one of barriers to more frequent participation in recreation activities.
- One of the strategies of the Plan was to establish criteria for a need assessment. Inventory of available and potential resources helped to find ways to extend recreation opportunities statewide. Yurts in Oregon State Park campgrounds were cited as a way to provide alternative camping opportunities for the public.

Appendix B-1
Ranking Table: Proximity to Primary Criterion

State Park	Market Area	Rank
Bay View	Puget Sound, Canada	3
Birch Bay	Puget Sound, Canada	3
Camano Island	Puget Sound, Canada	3
Deception Pass	Puget Sound, Canada	3
Fort Casey	Puget Sound, Canada	3
Fort Ebey	Puget Sound, Canada	3
Fort Flagler	Puget Sound, Canada	3
Fort Worden	Puget Sound, Canada	3
Larrabee	Puget Sound, Canada	3
Moran	Puget Sound, Canada	3
Old Fort Townsend	Puget Sound, Canada	3
Rasar	Puget Sound, Canada	3
Rockport	Puget Sound, Canada	3
Sequim Bay	Puget Sound, Canada	3
South Whidbey	Puget Sound, Canada	3
Spencer Spit	Puget Sound, Canada	3
Wenberg	Puget Sound, Canada	3
Ike Kinswa	Puget Sound, Portland	3
Lewis & Clark	Puget Sound, Portland	3
Millersylvania	Puget Sound, Portland	3
Rainbow Falls	Puget Sound, Portland	3
Sequest	Puget Sound, Portland	3
Battle Ground Lake	Portland	2
Beacon Rock	Portland	2
Brooks Memorial	Portland	2
Cape Disappointment	Portland	2
Horsethief Lake (Columbia Hills)	Portland	2
Maryhill	Portland	2
Paradise Point	Portland	2
Belfair	Puget Sound	2
Blake Island	Puget Sound	2
Bogachiel	Puget Sound	2
Daroga	Puget Sound	2
Dash Point	Puget Sound	2
Dosewallips	Puget Sound	2
Fay Bainbridge	Puget Sound	2
Grayland Beach	Puget Sound	2
Illahee	Puget Sound	2
Jarrell Cove	Puget Sound	2
Joemma Beach	Puget Sound	2
Kanaskat-Palmer	Puget Sound	2
Kitsap Memorial	Puget Sound	2
Kopachuck	Puget Sound	2
Lake Easton	Puget Sound	2

State Park	Market Area	Rank
Lake Sylvia	Puget Sound	2
Lake Wenatchee	Puget Sound	2
Lincoln Rock	Puget Sound	2
Manchester	Puget Sound	2
Ocean City	Puget Sound	2
Pacific Beach	Puget Sound	2
Penrose Point	Puget Sound	2
Potlatch	Puget Sound	2
Saltwater	Puget Sound	2
Scenic Beach	Puget Sound	2
Schafer	Puget Sound	2
Squilchuck	Puget Sound	2
Twanoh	Puget Sound	2
Twenty-Five Mile Cr.	Puget Sound	2
Twin Harbors	Puget Sound	2
Wallace Falls	Puget Sound	2
Wenatchee Confluence	Puget Sound	2
Curlew Lake	Spokane	2
Lewis & Clark Trail	Spokane	2
Mount Spokane	Spokane	2
Palouse Falls	Spokane	2
Potholes	Spokane	2
Riverside	Spokane	2
Steamboat Rock	Spokane	2
Sun Lakes	Spokane	2
Alta Lake	outside	1
Bridgeport	outside	1
Conconully	outside	1
Fields Spring	outside	1
Lake Chelan	outside	1
Osoyoos Lake	outside	1
Pearrygin Lake	outside	1
Wanapum	outside	1
Yakima Sportsman	outside	1
Sucia Island	Puget Sound, Canada	1*

* Sucia Island State Park was ranked as one (1), due to accessibility only by private boats.

Appendix B-2
Ranking Table: Capacity Criterion

State Park	Number of Campsites	Rank
Alta Lake	189	3
Belfair	181	3
Birch Bay	169	3
Cape Disappointment	254	3
Dash Point	137	3
Deception Pass	265	3
Dosewallips	139	3
Fort Flagler	121	3
Grayland Beach	113	3
Ike Kinswa	101	3
Lake Chelan	144	3
Lake Easton	138	3
Lake Wenatchee	199	3
Millersylvania	170	3
Moran	149	3
Ocean City	182	3
Potholes	120	3
Riverside	101	3
Steamboat Rock	209	3
Sun Lakes	175	3
Twin Harbors	301	3
Battle Ground Lake	53	2
Bay View	80	2
Blake Island	57	2
Camano Island	88	2
Conconully	73	2
Curlew Lake	99	2
Fort Ebey	54	2
Fort Worden	85	2
Kanaskat-Palmer	52	2
Larrabee	89	2
Lincoln Rock	96	2
Manchester	55	2
Maryhill	81	2
Osoyoos Lake	87	2
Pacific Beach	64	2
Paradise Point	79	2
Pearrygin Lake	84	2
Penrose Point	86	2
Rainbow Falls	50	2
Rockport	61	2
Saltwater	53	2
Scenic Beach	52	2

State Park	Number of Campsites	Rank
Sequest	91	2
Sequim Bay	81	2
South Whidbey	51	2
Sucia Island	55	2
Twenty-Five Mile Cr.	84	2
Wanapum	51	2
Wenatchee Confluence	71	2
Wenberg	79	2
Yakima Sportsman	71	2
Beacon Rock	36	1
Bogachiel	43	1
Bridgeport	34	1
Brooks Memorial	47	1
Daroga	47	1
Fay Bainbridge	39	1
Fields Spring	24	1
Fort Casey	38	1
Horsethief Lake (Columbia Hills)	14	1
Illahee	33	1
Jarrell Cove	8	1
Joemma Beach	19	1
Kitsap Memorial	47	1
Kopachuck	47	1
Lake Sylvia	37	1
Lewis & Clark	25	1
Lewis & Clark Trail	34	1
Mount Spokane	12	1
Old Fort Townsend	40	1
Palouse Falls	10	1
Potlatch	37	1
Rasar	49	1
Schafer	42	1
Spencer Spit	44	1
Squilchuck	20	1
Twanoh	49	1
Wallace Falls	6	1

Appendix B-3
Ranking Table: Demand Criterion

State Park	Avg. Annual Occupancy	Rank
Battle Ground Lake	30%	3
Bay View	28%	3
Beacon Rock	27%	3
Birch Bay	20%	3
Bridgeport	38%	3
Cape Disappointment	33%	3
Daroga	31%	3
Dash Point	23%	3
Deception Pass	31%	3
Dosewallips	23%	3
Fort Casey	39%	3
Fort Ebey	30%	3
Fort Flagler	27%	3
Fort Worden	47%	3
Grayland Beach	23%	3
Ike Kinswa	21%	3
Illahee	23%	3
Jarrell Cove	39%	3
Kanaskat-Palmer	35%	3
Kitsap Memorial	27%	3
Lake Chelan	27%	3
Lake Easton	20%	3
Lake Sylvia	27%	3
Larrabee	26%	3
Lincoln Rock	30%	3
Manchester	23%	3
Maryhill	38%	3
Millersylvania	21%	3
Moran	23%	3
Ocean City	25%	3
Pacific Beach	37%	3
Pearrygin Lake	37%	3
Potholes	28%	3
Potlatch	25%	3
Rasar	26%	3
Sequest	29%	3
South Whidbey	21%	3
Spencer Spit	25%	3
Steamboat Rock	21%	3
Wallace Falls	24%	3
Wanapum	33%	3
Wenatchee Confluence	52%	3
Yakima Sportsman	23%	3

State Park	Avg. Annual Occupancy	Rank
Belfair	17%	2
Camano Island	16%	2
Fay Bainbridge	17%	2
Joemma Beach	19%	2
Lake Wenatchee	16%	2
Lewis & Clark	19%	2
Old Fort Townsend	15%	2
Osoyoos Lake	17%	2
Paradise Point	15%	2
Rockport	16%	2
Saltwater	19%	2
Scenic Beach	15%	2
Schafer	16%	2
Sequim Bay	17%	2
Sun Lakes	16%	2
Twanoh	19%	2
Twenty-Five Mile Cr.	17%	2
Wenberg	19%	2
Alta Lake	13%	1
Blake Island	6%	1
Bogachiel	12%	1
Brooks Memorial	13%	1
Conconully	11%	1
Curlew Lake	10%	1
Fields Spring	7%	1
Horsethief Lake (Columbia Hills)	7%	1
Kopachuck	14%	1
Lewis & Clark Trail	10%	1
Mount Spokane	2%	1
Palouse Falls	12%	1
Penrose Point	9%	1
Rainbow Falls	14%	1
Riverside	12%	1
Squilchuck	12%	1
Sucia Island	7%	1
Twin Harbors	13%	1

Appendix B-4
Ranking Table: Features of the Park Criterion

	Camping	Waterfront	Recreation Boating/Fishing	Outdoor Recreation Trails	Historical Displays/Museums	Scenic Views	Wildlife Viewing/Birdwatching	Beach Walking	Organized Sports/Activities	Rank
State Park										
Battle Ground Lake	•	•	•	•			•		•	3
Birch Bay	•	•	•	•			•	•	•	3
Blake Island	•	•	•	•			•	•	•	3
Camano Island	•	•	•	•			•	•		3
Cape Disappointment	•	•	•	•	•		•	•		3
Daroga	•	•	•	•			•		•	3
Deception Pass	•	•	•	•	•	•	•	•		3
Fay Bainbridge	•	•	•	•	•			•		3
Fort Casey	•	•	•	•	•			•		3
Fort Ebey	•	•	•	•	•			•		3
Fort Flagler	•	•	•	•	•			•		3
Fort Worden	•	•	•	•	•			•	•	3
Grayland Beach	•	•	•	•			•	•		3
Illahee	•	•	•	•	•				•	3
Kopachuck	•	•	•	•			•	•		3
Lake Sylvia	•	•	•	•	•		•			3
Lewis & Clark Trail	•	•	•	•	•		•			3
Manchester	•	•	•	•	•				•	3
Moran	•	•	•	•		•	•			3
Ocean City	•	•	•	•			•	•		3
Rasar	•	•	•	•	•		•			3
Scenic Beach	•	•	•	•				•	•	3
Sequim Bay	•	•	•	•				•	•	3
South Whidbey	•	•	•	•			•	•		3
Spencer Spit	•	•	•	•			•	•		3
Steamboat Rock	•	•	•	•		•	•			3
Sucia Island	•	•	•	•			•	•		3
Alta Lake	•	•	•	•			•			2
Brooks Memorial	•	•	•	•					•	2
Dash Point	•	•	•	•				•		2
Dosewallips	•	•	•	•			•			2
Fields Spring	•	•		•			•		•	2
Horsethief Lake (Columbia Hills)	•	•	•	•	•					2
Jarrell Cove	•	•	•	•			•			2
Joemma Beach	•	•	•	•				•		2
Kitsap Memorial	•	•	•	•					•	2
Lake Easton	•	•	•	•			•			2

State Park	Camping	Waterfront	Recreation Boating/Fishing	Outdoor Recreation Trails	Historical Displays/Museums	Scenic Views	Wildlife viewing/Birdwatching	Beach Walking	Organized Sports/Activities	Rank
Larrabee	•	•	•	•				•		2
Lincoln Rock	•	•	•	•					•	2
Old Fort Townsend	•	•	•	•	•					2
Osoyoos Lake	•	•	•				•		•	2
Pacific Beach	•	•	•				•	•		2
Penrose Point	•	•	•	•				•		2
Potlatch	•	•	•	•			•			2
Rainbow Falls	•	•	•	•					•	2
Riverside	•	•	•	•	•					2
Saltwater	•	•	•	•				•		2
Sun Lakes	•	•	•	•	•					2
Twanoh	•	•	•	•					•	2
Twin Harbors	•	•	•	•				•		2
Wenatchee Confluence	•	•	•	•					•	2
Yakima Sportsman	•	•	•	•			•			2
Bay View	•	•	•				•			1
Beacon Rock	•	•	•	•						1
Belfair	•	•	•					•		1
Bogachiel	•	•	•	•						1
Bridgeport	•	•	•	•						1
Conconully	•	•	•							1
Curlew Lake	•	•	•	•						1
Ike Kinswa	•	•	•	•						1
Kanaskat-Palmer	•	•	•	•						1
Lake Chelan	•	•	•							1
Lake Wenatchee	•	•	•	•						1
Lewis & Clark	•		•	•						1
Maryhill	•	•	•	•						1
Millersylvania	•	•	•	•						1
Mount Spokane	•			•		•				1
Palouse Falls	•			•		•				1
Paradise Point	•	•	•	•						1
Pearrygin Lake	•	•	•	•						1
Potholes	•	•	•	•						1
Rockport	•			•			•			1
Schafer	•	•	•	•						1
Sequest	•	•		•					•	1
Squilchuck	•			•						1
Twenty-Five Mile Creek	•	•	•							1
Wallace Falls	•		•	•		•				1
Wanapum	•	•	•							1
Wenberg	•	•	•							1

Appendix B-5
Ranking Table: Campground Amenities Criterion

State Park	Picnicking	Group Camp	Dump Station	Disabled Access	Utility Spaces	Restrooms	Showers	Kitchen Shelters	Visitor/Education Centers	Rank
Alta Lake	•	•	•	•	•	•	•	•		3
Battle Ground Lake	•	•	•	•	•	•	•	•		3
Birch Bay	•	•	•	•	•	•	•	•		3
Brooks Memorial	•	•	•		•	•	•	•	•	3
Daroga	•	•	•	•	•	•	•	•		3
Deception Pass	•	•	•	•	•	•	•	•	•	3
Dosewallips	•	•	•	•	•	•	•	•		3
Fort Flagler	•	•	•	•	•	•	•	•	•	3
Illahee	•	•	•	•	•	•	•	•		3
Kanaskat-Palmer	•	•	•	•	•	•	•	•		3
Kitsap Memorial	•	•	•	•	•	•	•	•		3
Lake Wenatchee	•	•	•	•	•	•	•	•		3
Lewis & Clark Trail	•	•	•	•		•	•	•	•	3
Millersylvania	•	•	•	•	•	•	•	•	•	3
Rasar	•	•	•	•	•	•	•	•		3
Seaquest	•	•	•	•	•	•	•	•	•	3
Sequim Bay	•	•	•	•	•	•	•	•		3
South Whidbey	•	•	•	•	•	•	•	•		3
Sun Lakes	•	•	•	•	•	•	•	•	•	3
Twin Harbors	•	•	•	•	•	•	•	•		3
Wenatchee Confluence	•	•	•	•	•	•	•	•		3
Bay View	•	•	•	•	•	•	•			2
Belfair	•		•	•	•	•	•	•		2
Bogachiel	•	•	•		•	•	•	•		2
Bridgeport	•	•	•	•	•	•	•			2
Camano Island	•	•	•	•		•	•	•		2
Cape Disappointment	•		•	•	•	•	•		•	2
Dash Point	•	•	•	•	•	•	•			2
Fay Bainbridge	•		•	•	•	•	•	•		2
Fort Worden	•		•	•	•	•	•		•	2
Kopachuck	•	•	•	•		•	•	•		2
Lake Easton	•	•	•	•	•	•	•			2
Lincoln Rock	•		•	•	•	•	•	•		2
Manchester	•	•	•	•	•	•	•			2
Maryhill	•	•	•	•	•	•	•			2
Ocean City	•	•	•	•	•	•	•			2
Pearrygin Lake	•	•	•	•	•	•	•			2
Penrose Point	•	•	•	•	•	•	•			2

State Park	Picnicking	Group Camp	Dump Station	Disabled Access	Utility Spaces	Restrooms	Showers	Kitchen Shelters	Visitor/Education Centers	Rank
Potholes	•	•	•	•	•	•	•			2
Rainbow Falls	•	•	•		•	•	•	•		2
Riverside	•	•			•	•	•	•	•	2
Rockport	•	•	•		•	•	•	•		2
Saltwater	•	•	•	•		•	•	•		2
Scenic Beach	•	•	•	•		•	•	•		2
Spencer Spit	•	•	•	•		•	•	•		2
Twanoh	•	•		•	•	•	•	•		2
Twenty-Five Mile Creek	•	•	•	•	•	•	•			2
Wenberg	•		•	•	•	•	•	•		2
Yakima Sportsman	•		•	•	•	•	•	•		2
Beacon Rock	•	•	•			•	•	•		1
Blake Island	•	•				•	•			1
Conconully	•		•	•		•	•	•		1
Curlew Lake	•		•		•	•	•			1
Fields Spring	•		•	•		•	•	•		1
Fort Casey	•			•		•	•		•	1
Fort Ebey	•	•		•	•	•	•			1
Grayland Beach	•			•	•	•	•			1
Horsethief Lake (Columbia Hills)	•		•		•	•				1
Ike Kinswa	•		•	•	•	•	•			1
Jarrell Cove	•	•		•		•	•	•		1
Joemma Beach	•			•						1
Lake Chelan	•		•		•	•	•	•		1
Lake Sylvia	•	•	•	•		•	•			1
Larrabee	•	•	•	•	•		•			1
Lewis & Clark	•	•		•		•	•	•		1
Moran	•		•	•		•	•	•		1
Mount Spokane	•	•		•		•		•		1
Old Fort Townsend	•	•	•			•	•	•		1
Osoyoos Lake	•		•	•		•	•	•		1
Pacific Beach	•		•	•	•	•	•			1
Palouse Falls	•			•		•				1
Paradise Point	•		•		•	•	•			1
Potlatch	•		•		•	•	•			1
Schafer	•		•		•	•	•			1
Squilchuck	•	•				•	•	•		1
Steamboat Rock	•		•	•	•	•	•			1
Sucia Island	•	•								1
Wallace Falls	•					•		•		1
Wanapum	•			•		•	•			1

Appendix B-6

Ranking Table: Seasonal Restrictions Criterion

State Park	Seasonal Restrictions	Campground Season	Rank
Battle Ground Lake	none	year-round	3
Belfair	none	year-round	3
Blake Island	none	year-round	3
Brooks Memorial	none	year-round	3
Cape Disappointment	none	year-round	3
Dosewallips	none	year-round	3
Fields Spring	none	year-round	3
Fort Casey	none	year-round	3
Fort Ebey	none	year-round	3
Grayland Beach	none	year-round	3
Illahee	none	year-round	3
Jarrell Cove	none	year-round	3
Joemma Beach	none	year-round	3
Kanaskat-Palmer	none	year-round	3
Kitsap Memorial	none	year-round	3
Lake Chelan	none	year-round	3
Lake Wenatchee	none	year-round	3
Manchester	none	year-round	3
Maryhill	none	year-round	3
Millersylvania	none	year-round	3
Ocean City	none	year-round	3
Pacific Beach	none	year-round	3
Palouse Falls	none	year-round	3
Paradise Point	none	year-round	3
Penrose Point	none	year-round	3
Potholes	none	year-round	3
Potlatch	none	year-round	3
Rainbow Falls	none	year-round	3
Riverside	none	year-round	3
Seaquest	none	year-round	3
Steamboat Rock	none	year-round	3
Sucia Island	none	year-round	3
Sun Lakes	none	year-round	3
Wallace Falls	none	year-round	3
Wenatchee Confluence	none	year-round	3
Yakima Sportsman	none	year-round	3
Bay View	some campsites are closed in winter	year-round (partial)	2
Birch Bay	some campsites are closed in winter	year-round (partial)	2
Bogachiel	some campsites are closed in winter	year-round (partial)	2
Camano Island	some campsites are closed in winter	year-round (partial)	2

State Park	Seasonal Restrictions	Campground Season	Rank
Dash Point	The upper campground is closed from Sept. 13 to April 15.	year-round (partial)	2
Deception Pass	some campsites are closed in winter	year-round (partial)	2
Fort Worden	Lower campground is opened during winter; upper campground is closed from Dec. 1 to Feb. 13.	year-round (partial)	2
Ike Kinswa	some campsites are closed in winter	year-round (partial)	2
Larrabee	some campsites are closed in winter	year-round (partial)	2
Lewis & Clark	some campsites are closed in winter	year-round (partial)	2
Moran	some campsites are closed in winter	year-round (partial)	2
Rasar	some campsites are closed in winter	year-round (partial)	2
Sequim Bay	some campsites are closed in winter	year-round (partial)	2
South Whidbey	some campsites are closed in winter	year-round (partial)	2
Wenberg	some campsites are closed in winter	year-round (partial)	2
Alta Lake	Campground is closed from Nov. 1 to March 25.	limited season	1
Beacon Rock	Main campground is closed from Oct. 18 to Apr. 1. Four campsites are available year-round.	limited season	1
Bridgeport	Campground is closed from Nov. 1 to March 25.	limited season	1
Conconully	Main portion of park open weekends and holidays only Dec. 1 through March 25. Lower lake camping area closed from Sept. 15 to April 1.	limited season	1
Curlew Lake	Campground is closed from Nov. 1 to Apr. 1. Snow conditions may influence the reopening date.	limited season	1
Daroga	Campground is closed from Oct. 11 to March 11.	limited season	1
Fay Bainbridge	Campground is closed from Oct. 18 to April 8.	limited season	1
Fort Flagler	Campground is closed from Nov. 1 to March. 1	limited season	1
Horsethief Lake (Columbia Hills)	Campground is closed from Nov. 1 to Apr. 1.	limited season	1
Kopachuck	Campground is closed from Oct. 4 to March 25.	limited season	1

State Park	Seasonal Restrictions	Campground Season	Rank
Lake Easton	Campground is closed from Oct. 26 to April 22. Winter camping is available in the day-use area.	limited season	1
Lake Sylvia	Campground is closed from Oct. 6 to March 5. Winter camping is available in the day-use area.	limited season	1
Lewis & Clark Trail	Campground is closed from Sep.15 to April 1. Winter camping is available in the day-use area.	limited season	1
Lincoln Rock	Campground is closed from Oct. 18 to March 11.	limited season	1
Mount Spokane	Campground is closed from Sep.15 to May 20.	limited season	1
Old Fort Townsend	Campground is closed from Oct. 1 to April 1.	limited season	1
Osoyoos Lake	Open for camping and day use weekends and holidays only Oct. 25 through March 18.	limited season	1
Pearrygin Lake	Campground is closed from Oct. 25 to April 1, depending on weather and snow conditions.	limited season	1
Rockport	Campground is closed from Oct. 31 to April 1.	limited season	1
Saltwater	Campground is closed from Oct. 4 to April 22.	limited season	1
Scenic Beach	Campground is closed from Sep. 27 to April 22.	limited season	1
Schafer	Campground is closed from Oct. 5 to April 21.	limited season	1
Spencer Spit	Campground is closed from Oct. 31 to March 4.	limited season	1
Squilchuck	Campground is closed from Sep. 27 to May 13. Snow conditions may influence the reopening date.	limited season	1
Twanoh	Campground is closed from Oct. 11 to April 1.	limited season	1
Twenty-Five Mile Cr.	Campground is closed from Oct. 11 to April 1.	limited season	1
Twin Harbors	flooding might cause some of these campsites to be closed during rainy months.	limited season	1
Wanapum	Campground is closed from Nov. 1 to Apr. 1.	limited season	1

Appendix C Ranking Table: Summary

Evaluation Scale Rank for Potential Development 1=some 2=moderate 3=substantial	Proximity Factor	Weighted Proximity Factor	Capacity Factor	Demand Factor	Features of Park Factor	Weighted Features of Park Factor	Campground Amenities Factor	Seasonal Restrictions Factor	Total Rank
Deception Pass	3	6	3	3	3	6	3	2	23
Birch Bay	3	6	3	2	3	6	3	2	22
Fort Flagler	3	6	3	3	3	6	3	1	22
South Whidbey	3	6	2	3	3	6	3	2	22
Battle Ground Lake	2	4	2	3	3	6	3	3	21
Cape Disappointment	2	4	3	3	3	6	2	3	21
Fort Ebey	3	6	2	3	3	6	1	3	21
Fort Worden	3	6	2	3	3	6	2	2	21
Moran	3	6	3	3	3	6	1	2	21
Ocean City	2	4	3	3	3	6	2	3	21
Rasar	3	6	1	3	3	6	3	2	21
Sequim Bay	3	6	2	2	3	6	3	2	21
Camano Island	3	6	2	2	3	6	2	2	20
Dosewallips	2	4	3	3	2	4	3	3	20
Fort Casey	3	6	1	3	3	6	1	3	20
Grayland Beach	2	4	3	3	3	6	1	3	20
Illahee	2	4	1	3	3	6	3	3	20
Manchester	2	4	2	3	3	6	2	3	20
Millersylvania	3	6	3	3	1	2	3	3	20
Steamboat Rock	2	4	3	3	3	6	1	3	20
Seaquest	3	6	2	3	1	2	3	3	19
Spencer Spit	3	6	1	3	3	6	2	1	19
Sun Lakes	2	4	3	2	2	4	3	3	19
Wenatchee Confluence	2	4	2	3	2	4	3	3	19
Daroga	2	4	1	3	3	6	3	1	18
Dash Point	2	4	3	3	2	4	2	2	18
Kitsap Memorial	2	4	1	3	2	4	3	3	18
Larrabee	3	6	2	3	2	4	1	2	18
Rainbow Falls	3	6	2	1	2	4	2	3	18
Bay View	3	6	2	3	1	2	2	2	17
Blake Island	2	4	2	1	3	6	1	3	17
Ike Kinswa	3	6	3	3	1	2	1	2	17
Kanaskat-Palmer	2	4	2	3	1	2	3	3	17
Lake Wenatchee	2	4	3	2	1	2	3	3	17
Pacific Beach	2	4	2	3	2	4	1	3	17
Potholes	2	4	3	3	1	2	2	3	17

Evaluation Scale Rank for Potential Development 1=some 2=moderate 3=substantial	Proximity Factor	Weighted Proximity Factor	Capacity Factor	Demand Factor	Features of Park Factor	Weighted Features of Park Factor	Campground Amenities Factor	Seasonal Restrictions Factor	Total Rank
Riverside	2	4	3	1	2	4	2	3	17
Scenic Beach	2	4	2	2	3	6	2	1	17
Belfair	2	4	3	2	1	2	2	3	16
Brooks Memorial	2	4	1	1	2	4	3	3	16
Fay Bainbridge	2	4	1	2	3	6	2	1	16
Jarrell Cove	2	4	1	3	2	4	1	3	16
Lake Easton	2	4	3	2	2	4	2	1	16
Lake Sylvia	2	4	1	3	3	6	1	1	16
Lewis & Clark Trail	2	4	1	1	3	6	3	1	16
Lincoln Rock	2	4	2	3	2	4	2	1	16
Maryhill	2	4	2	3	1	2	2	3	16
Penrose Point	2	4	2	1	2	4	2	3	16
Potlatch	2	4	1	3	2	4	1	3	16
Twin Harbors	2	4	3	1	2	4	3	1	16
Wenberg	3	6	2	2	1	2	2	2	16
Yakima Sportsman	1	2	2	3	2	4	2	3	16
Joemma Beach	2	4	1	2	2	4	1	3	15
Kopachuck	2	4	1	1	3	6	2	1	15
Old Fort Townsend	3	6	1	2	2	4	1	1	15
Rockport	3	6	2	2	1	2	2	1	15
Saltwater	2	4	2	2	2	4	2	1	15
Sucia Island	1	2	2	1	3	6	1	3	15
Alta Lake	1	2	3	1	2	4	3	1	14
Lake Chelan	1	2	3	3	1	2	1	3	14
Lewis & Clark	3	6	1	2	1	2	1	2	14
Paradise Point	2	4	2	2	1	2	1	3	14
Twanoh	2	4	1	2	2	4	2	1	14
Wallace Falls	2	4	1	3	1	2	1	3	14
Twenty-Five Mile Cr.	2	4	2	2	1	2	2	1	13
Beacon Rock	2	4	1	3	1	2	1	1	12
Bogachiel	2	4	1	1	1	2	2	2	12
Fields Spring	1	2	1	1	2	4	1	3	12
Horsethief Lake (Columbia Hills)	2	4	1	1	2	4	1	1	12
Osoyoos Lake	1	2	2	2	2	4	1	1	12
Palouse Falls	2	4	1	1	1	2	1	3	12
Pearrygin Lake	1	2	2	3	1	2	2	1	12
Bridgeport	1	2	1	3	1	2	2	1	11
Curlew Lake	2	4	2	1	1	2	1	1	11
Schafer	2	4	1	2	1	2	1	1	11
Wanapum	1	2	2	3	1	2	1	1	11

Evaluation Scale Rank for Potential Development 1=some 2=moderate 3=substantial	Proximity Factor	Weighted Proximity Factor	Capacity Factor	Demand Factor	Features of Park Factor	Weighted Features of Park Factor	Campground Amenities Factor	Seasonal Restrictions Factor	Total Rank
Mount Spokane	2	4	1	1	1	2	1	1	10
Squilchuck	2	4	1	1	1	2	1	1	10
Conconully	1	2	2	1	1	2	1	1	9