

RECLAMATION

Managing Water in the West

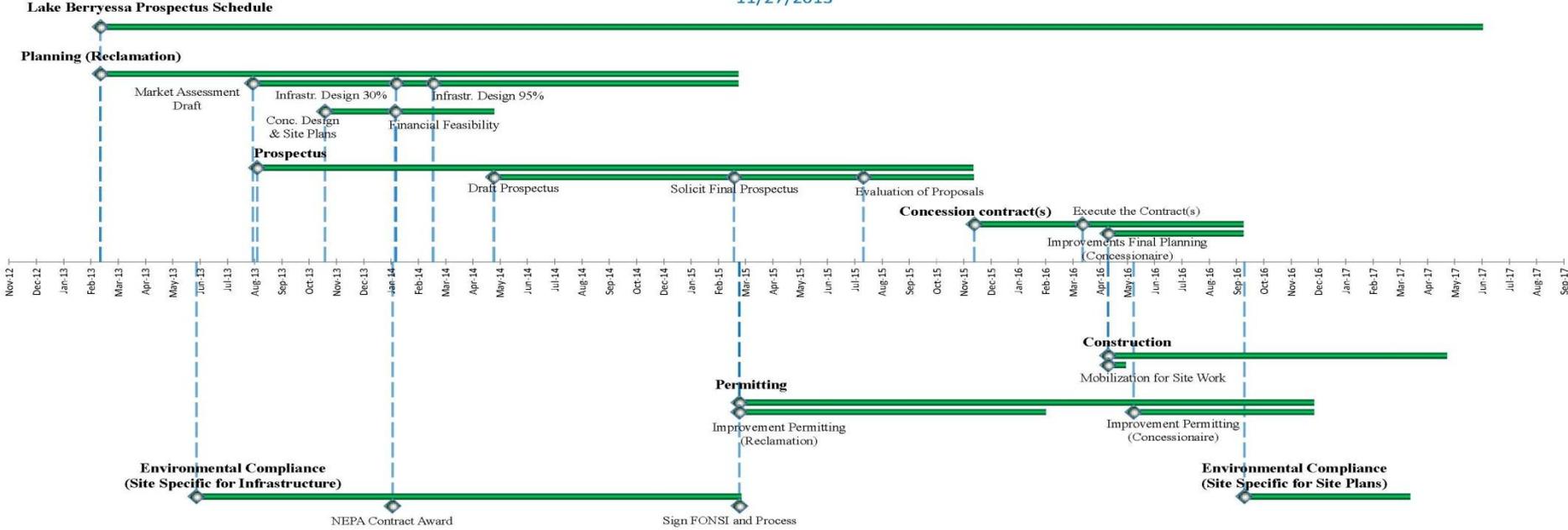
Update on Lake Berryessa Long-Term Contract Timeline



U.S. Department of the Interior
Bureau of Reclamation

Lake Berryessa Long Term Concession Area Development

11/27/2013



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Lake Berryessa

Market Assessment



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Market Assessment

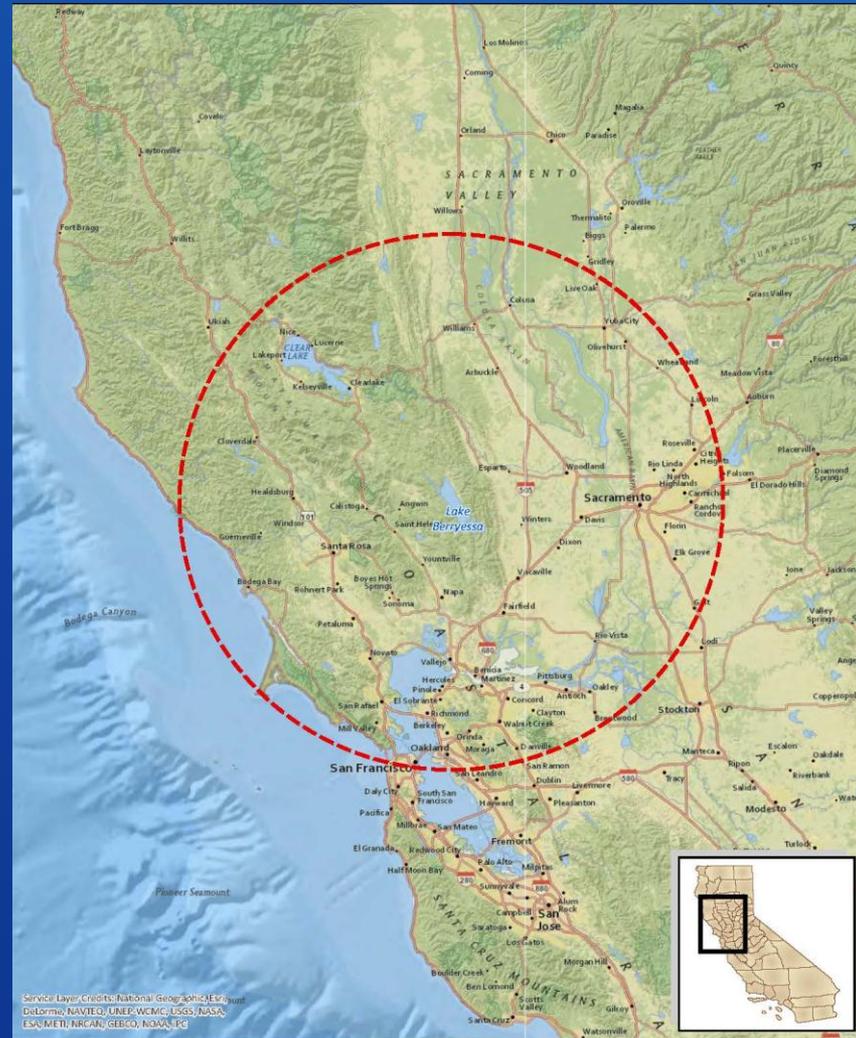
- **Market Assessment - A process to evaluate market conditions to determine what facilities and services should be provided to a group of customers**
- **Lake Berryessa Market Assessment will focus on evaluating public use services and facilities at**
 - **Steele Canyon**
 - **Putah Canyon**
 - **Berryessa Point**
 - **Monticello Shores**
 - **Spanish Flat**
- **Will be consistent with VSP ROD and Reclamation's Concession Management Directives and Standards**

Market Assessment Tasks

- Evaluate existing and future recreation trends and participation levels
- Estimate future population and demographic profile of visitors to Lake Berryessa
- Evaluate recreation environment at Lake Berryessa and comparable sites
- Define factors that can influence recreation demand
- Recommend types, quantities and locations of new facilities and services for Lake Berryessa

Lake Berryessa Market Area

- Lake Berryessa serves both Bay Area and Sacramento Valley counties
- State has identified the Central Valley as an underserved region for outdoor recreation and has set a priority to improve opportunities



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Regional Population and Demographic Trends – Central Valley

- The Central Valley's population is projected to nearly double, from 7.8 million in 2000 to 14 million in 2030 *
- Population, age and gender ratios are expected to change relatively little

* California Department of Parks and Recreation, 2009

Regional Population and Demographic Trends – Bay Area

- The Bay Area's population is projected to increase from 7.2 million in 2010 to 9.3 million in 2040 *
- Population, age and gender ratio are expected to change relatively little

* March 2013 Draft Bay Area Plan Forecast of Jobs, Population and Housing

Recreation Trends

- As society becomes more urbanized, travel patterns will increasingly depend on the *quality* of recreation opportunities and settings
- Developed land activities will increase at a rate greater than population growth through 2050
- Water-based recreational activities are expected to increase while primary-purpose trips are expected to decrease
- Offering multiple recreational opportunities should draw visitors for longer stays

Factors that Influence Recreation Demand

- Lake Berryessa has undergone a transformation like few lakes witness in such a short time; it is difficult to judge how quickly visitation will return
- Many factors influence demand, including population, visitor satisfaction, prices, resource impacts, public safety, rules and regulations, drive time and solitude
- Recreation demand is not as simple as the cliché “build it and they will come”

Factors that Influence Recreation Demand

- Recreation demand does not simply increase with greater supply of facilities or investment
- There is an optimal range of investment and supply of facilities to meet and sustain a level of demand - more development is not necessarily better
- “Boat capacity” of a lake will influence the services provided
- Nationwide, recreation use will continue to increase as a result of increased leisure time of the “baby boomer” generation

Preliminary Facilities and Services

Market condition will likely sustain the following at Lake Berryessa:

- RV standard and full hook ups
- RV dump stations
- Developed tent/trailer standard sites
- Group camping sites
- Playgrounds
- Single and group day use sites
- Hike-in campgrounds
- Boat-in campgrounds
- Floating campsites
- Yurts, park models, cabins with various amenities
- Marinas with gas, septic pump-out stations
- Boat slips for houseboats, ski boats, fishing boats
- Boat launches
- Equipment and boat rentals
- Retail sales, gas, restaurant, convenience store, café
- Swim beach

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Preliminary Facilities and Services

Market conditions will likely sustain the following at Lake Berryessa:

- **Laundry facilities**
- **Comfort stations with flush toilets and showers**
- **Vault toilets**
- **Fish-cleaning stations**
- **Connecting trails**
- **Employee housing**
- **Multi-purpose center**
- **Maintenance shop**
- **Dry boat storage**

Sources for Facility/Service Recommendations

- Visitor Services Plan (VSP) Record of Decision (ROD)
- National Surveys on the Recreation and Environment
- 2009 State Comprehensive Outdoor Recreation Plan
- U.S. Census Bureau and California Department of Finance
- Recreation information from agency websites
- Recreation information from comparable sites
- Personal communication with recreation staff from Reclamation and other agencies
- Personal communication with concession managers

Napa County Study Results

- **Independent Market Study and Financial Feasibility Study performed by PKF Consulting USA**
- **Purpose - To determine the feasibility of development of lodging facilities**
- **Traditional hotel not feasible**
- **Lodging facility of +/- 50 “Park Model” units may be feasible**

Required vs Authorized Facilities

- **Required services** are those types of services, facilities and activities that a concessionaire is required to offer to the public. Required services are not optional and must be provided.
- **Authorized services** are those types of services, facilities and activities that a concessionaire is authorized to provide during the term of the concession contract.

Next Steps

- **Conceptual site planning**
- **Financial feasibility evaluation**
- **NEPA compliance**