Update on Lake Berryessa Long-Term Contract Timeline
Lake Berryessa
Market Assessment
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  - Monticello Shores
  – Putah Canyon  - Spanish Flat
  – Berryessa Point

• 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
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 hookups
- 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
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