



## Clinch River State Park

# Market Analysis and Business Plan



**November 2022**

Prepared By:





**“RIVERS ARE PLACES THAT RENEW OUR SPIRIT, CONNECT US WITH OUR PAST, AND LINK US DIRECTLY WITH THE FLOW AND RHYTHM OF THE NATURAL WORLD.”**

*- Ted Turner*

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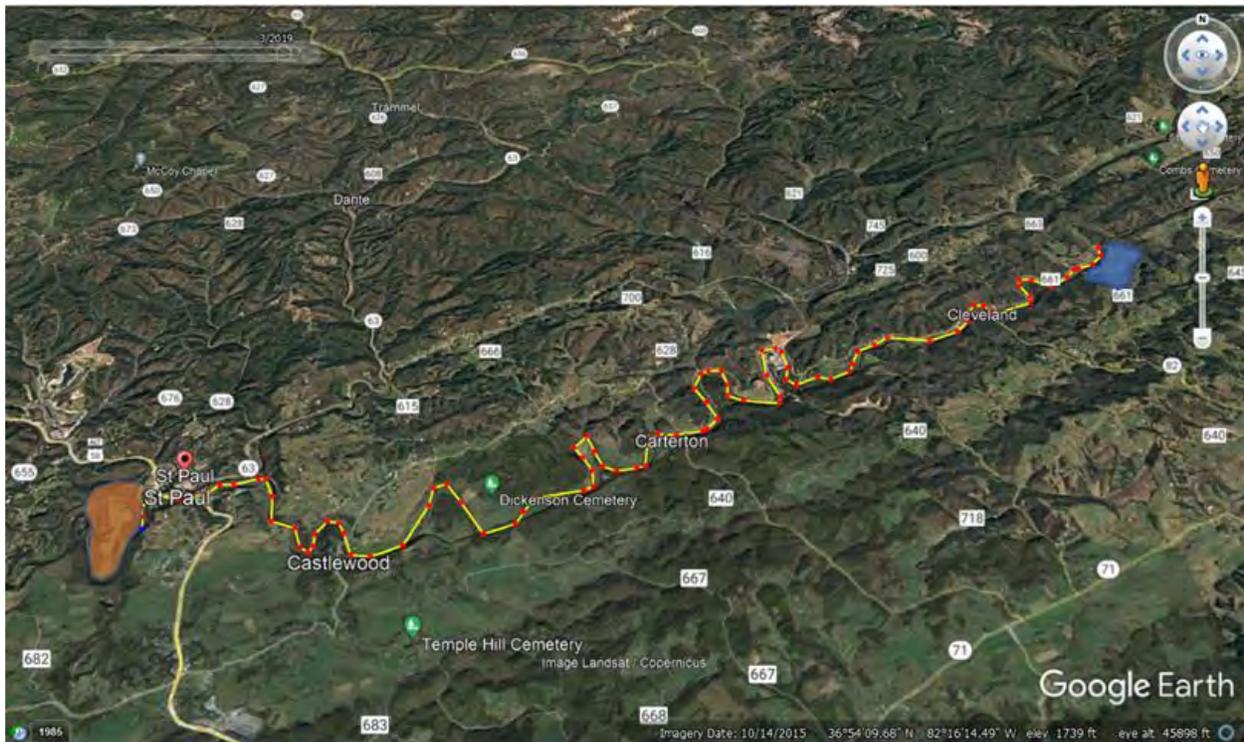
## EXECUTIVE SUMMARY

The Virginia Department of Conservation and Recreation (DCR) envisions a new state park in far western Virginia that will be unique in the system, as well as a tremendous asset to the local communities. Clinch River State Park is to be designed and operated as a “string of pearls” along the Clinch River which is already very popular for recreational paddlers. This park and its multiple units will be enabling infrastructure that further promotes and supports paddling and recreational access to the highly scenic Clinch River in an area of the state that currently does not have a state park.

## INTRODUCTION

This *Market Analysis and Business Plan* was completed in September 2022 as a part of the master plan process of two units in particular – the Artrip Bent unit located in Russell County and the Sugar Hill unit located in Wise County. These two units are the anchors of a stretch of the Clinch River that is approximately 20 river miles in length and feature multiple access points between them. There is currently a local initiative, the Clinch River Valley Initiative (CRVI), that has organized and works to promote the recreational benefits, ecological biodiversity, and economic potential of the Clinch River as a significant natural resource in the region. CRVI currently designs and installs signage at key river access points and provides printed and digital information for users and visitors.

A Google Earth image of these two units and the Clinch River are detailed in the map below.



- Artrip Bent unit
- Sugar Hill unit
- Clinch River

## OBJECTIVES OF THE MARKET ANALYSIS AND BUSINESS PLAN

This *Market Analysis and Business Plan* was developed under the following objectives:

-  Evaluate the market characteristics and opportunities of the layered service markets for Clinch River State Park and its multiple units.
-  Integrate and enhance existing recreational and usage opportunities of the Clinch River into the operational strategy of the state park.
-  Utilize best practices and proven strategies for achieving a standard of excellence and financial resiliency in the operational strategy for Clinch River State Park.
-  Improve the visibility and desirability of Clinch River State Park as a unique resource for the local residents and visitors to the region.
-  To provide reliable access to the Clinch River for varied recreational uses that are respectful to the natural resources of the area and the overall health of the waterway.
-  Support the community investment with seamless and respectful operations and enhance partnerships and funding opportunities in both the public and private sectors.

## ELEMENTS OF THE PLAN

The major components and key recommendations of this *Market Analysis and Business Plan* are the result of industry best-practice analyses at the local, regional and national levels. The components include:

- Service market delineation and analysis
- Regional and national trends analysis
- Usage and visitation projections
- Design recommendations
- Operations and management strategies
- Financial performance projections

## OPPORTUNITIES AND CONSTRAINTS

There are opportunities and constraints that have been identified and addressed in the planning process of developing this *Market Analysis and Business Plan*. These are based on a thorough review of the site and engagement with local state park staff. They are detailed below and included in developing the operational strategy and pro forma that follows in this plan.

There are several opportunities that benefit the potential operational success of Clinch River State Park that have been identified. Those include, but are not limited to the following:

- The linkage of multiple sites along the Clinch River which is already a popular paddling destination.
- The limited availability of cabins and improved “park” accommodations in the near vicinity and region.
- Existing tourism and visitation to St. Paul and the area.
- The incredible beauty and terrain of both the Artrip Bent and Sugar Hill units.

In addition to the opportunities afforded by the sites, there are three primary constraints that must be addressed in the business plan portion of this study. These include, but are not limited to:

- While there is existing tourism to the area, the usage projections of the state park are nearly double the amount of current annual visitation to the region.
- Terrain and topography constrain potential development opportunities.
- There is not a direct river access options from the Artrip Bent site due to topography and an existing railroad track.

## KEY RECOMMENDATIONS

### INCLUSIVE USAGE AND BROAD APPEAL

It is critical that the design of both the Artrip Bent and Sugar Hill units enable and support usage from visitors with broad interests, varied skills and backgrounds, and diverse socioeconomic characteristics. Similarly, possible visitor experiences that range from free or low cost to more expensive will ensure that the park will be viewed as an asset for all types of users, including local residents and those that are visiting the region from further afield. There are certain activities and user experiences that may not be appropriate for these sites given their topography, ecological sensitivities, and the operational values and policies of DCR. These may include but not be limited to ATV/UTV usage, extensive adventure courses, and archery or firearm ranges. Each potential use should be carefully evaluated whether it is a good “fit” for the site and meets the operational objectives of DCR.

Site features and amenities that support broad and varied outdoor experiences will not only optimize potential visitation, but also increase the opportunities for revenue generation that can support operating costs. Revenues generated from park access, day and overnight facility use, and concession permits could be significant with the proper blend of features and amenities.

### ARTRIP BENT UNIT DESIGN AND OPERATIONS

The Artrip Bent unit is located upstream of the Sugar Hill unit and other river access points, and therefore is largely expected to be utilized as a staging point for river recreationalists planning to paddle the river at varied lengths. It should also be designed as a stand-alone state park destination for users that may only be seeking the experience the park itself can provide. As a result, it is recommended the design of the Artrip Bent unit include varied overnight accommodations from camping to yurts or cabins, limited day use facilities (picnic shelters or pavilions), comfort station(s), and trails. A group camping area should also be considered at this site.

This site will require staff specifically assigned to the unit in order to properly operate and provide the necessary coverage for maintenance, visitor engagement, and security. It is possible entry into the site can be managed by an automated fee gate thereby relieving state park staff of manning an entry booth for fee collection and creating greater operational efficiency. It is also recommended to utilize park host volunteers that could provide a 24-hour presence and visitor support for the park and its guests.

## SUGAR HILL UNIT DESIGN AND OPERATIONS

The Sugar Hill unit affords itself to much greater development opportunities because of its size, its topography, and its proximity to the community of St. Paul. This is a site that is likely to be enjoyed both as a day-use site for trails and other related amenities, but also as a high quality overnight stay destination. It is recommended that facility and amenity development on the Sugar Hill unit include but not be limited to:

- ◆ Primitive camping sites
- ◆ Water/electric camping sites / RV camping sites
- ◆ Cabins / yurts
- ◆ Paddle-in campsites
- ◆ Trails
- ◆ Playground / nature play area
- ◆ Comfort stations
- ◆ Day-use / picnic area with shelters
- ◆ Visitor center
  - Interpretive exhibits
  - Retail / park store
  - Multi-purpose meeting space
  - Administrative and storage space
- ◆ Maintenance shop / yard

This blend of facility/amenity development also creates robust opportunities for revenue generation to assist in off-setting operating costs. It is recommended that the state park staff that service and manage both the Artrip Bent and Sugar Hill units be based at Sugar Hill. This would require spaces to be developed that support their administrative and maintenance requirements. Finally, it is recommended that work campers / park hosts be utilized to augment staff resources in maintenance and visitor engagement.



## MARKET ANALYSIS

### INTRODUCTION

Virginia Department of Conservation and Recreation (DCR) selected the team that includes PROS Consulting to assist in completing a Market Analysis and Business Plan for the envisioned Clinch River State Park in western Virginia. This plan will serve the park and DCR over the next 10 years by providing strategic direction and vision for the development of this new state park and its related sites along the Clinch River. A key component of the planning process is a market opportunity analysis that identifies the most important aspects of the service market relevant to the DCR’s priorities in this project, as well as an analysis of market and service opportunities based on detailed information on similar service providers in the area and emerging best practices from around country. This analysis will include identification of the service area being evaluated, a detailed demographics analysis of that service area, a national and regional trends analysis, a similar provider assessment, and program and services review.



Photo: Office of the Governor - Jack Mayer

### SERVICE MARKET DELINEATION

A major focus of this Market Analysis and Business Plan is an informed evaluation of development and operational opportunities of Clinch River State Park being newly DCR. This future park will be comprised of multiple sites along the Clinch River in a “string of pearls” concept to provide river access and outdoor recreation opportunities for local residents and the region. The primary site envisioned to have the most intensive development if referred to as the Sugar Hill tract near the town of St. Paul, Virginia.

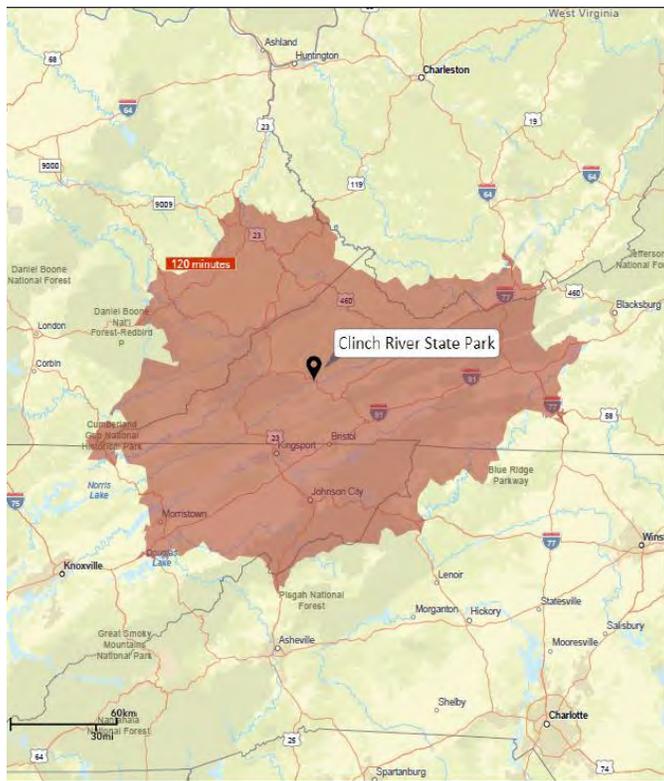


Figure 1a: Primary Service Area Boundaries

State Parks generally, and certainly Clinch River State Park, are typically regional destinations with draw and appeal for visitors that extends several hours drive time from the site. In order to evaluate the market potential and positioning of the future state park, a primary and secondary service market was identified. The primary service market is based on a two-hour (120 minutes) drive time from the Sugar Hill tract. Based on typical state park visitation patterns, it is expected that 60-75% of the visitors to the new state park will originate from within this service area. The secondary service market is based on a five-hour (300 minutes) drive time from the site. It is anticipated 25-40% of the visitors will originate from the region that extends between two hours and five hours from the site. While visitors and users may originate from beyond these service areas, this region is most likely to include the vast majority of visitors.

The map to the left illustrates that primary service area (Figure 1a) and the map on the following page depicts both the primary and secondary service markets combined (Figure 1b).

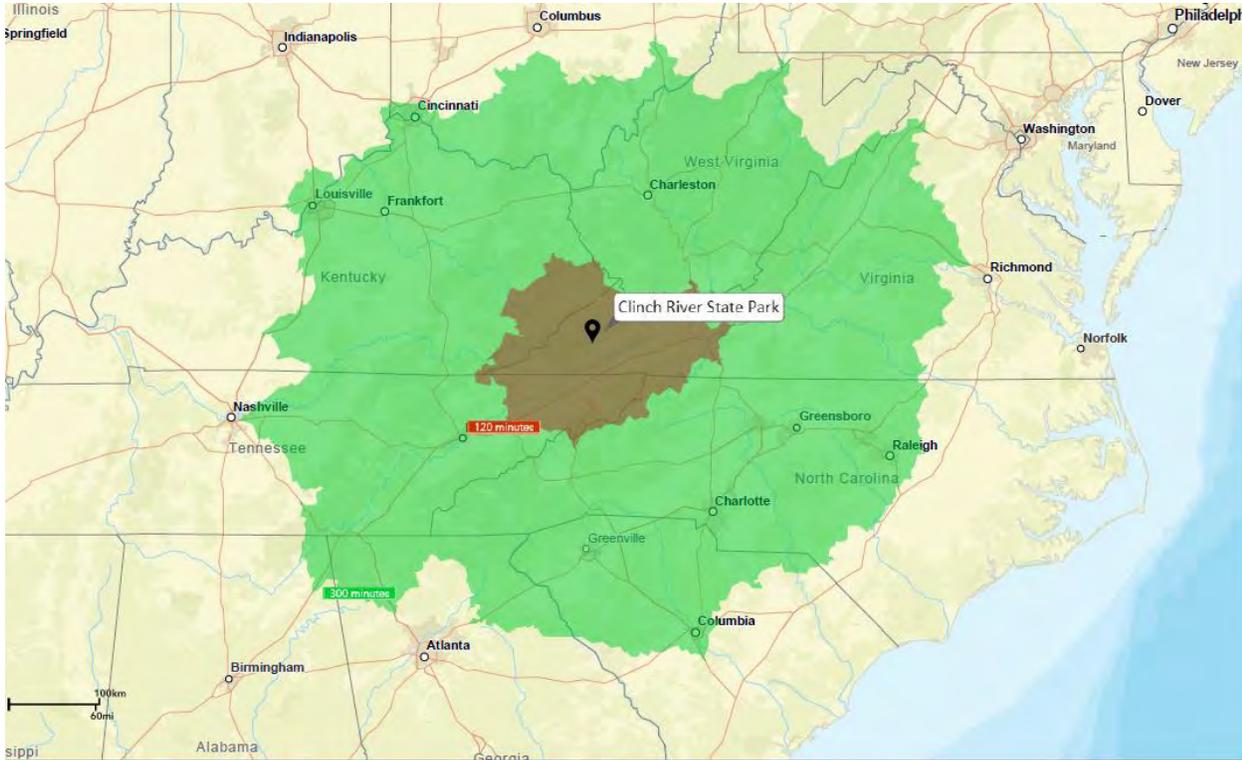


Figure 2b: Primary (120 minutes) and Secondary (300 minutes) Service Area Boundaries

The primary service area is predominantly rural, with the only real population center being the Tri-cities region of Tennessee that includes the cities of Kingsport, Bristol and Johnson City, Tennessee. Nearly 40% of the total population of the primary service area is located within that region of Tennessee which is approximately 30-35 miles south of the park site.

The secondary service area, which extends to a five-hour drive time from the park, includes several large metropolitan areas in multiple states including Cincinnati, Ohio; Lexington, Frankfort and Louisville, Kentucky; Charleston, West Virginia; Greensboro, Raleigh and Charlotte, North Carolina; Greenville and Columbia, South Carolina; and reaches to the outskirts of Nashville, Tennessee. The secondary service area even extends to within 60 miles of Atlanta, Georgia.

### DEMOGRAPHICS ANALYSIS

The demographics and recreational trends analysis helps provide a thorough understanding of the demographic makeup of residents within the primary service area, assesses key economic factors, as well as identifies national, regional, and local recreational trends that are relevant to the planning process.

The demographic analysis describes the population within primary and secondary service areas of the study focus. This assessment is reflective of the region's total population and its key characteristics such as age segments, race, ethnicity, income levels, and gender. It is important to note that future projections are based on historical patterns and unforeseen circumstances during or after the time of the analysis could have a significant bearing on the validity of the projected figures.

**PRIMARY SERVICE AREA DEMOGRAPHIC OVERVIEW**



**2021 Total Population**  
**1,352,563**



**2021 Total Households**  
**560,624**



**2021 Median Age**  
**44.4 years**



**2021 Median Household Income**  
**\$41,798**



**2021 Race**  
**93% White 3% Black Alone**  
**1% Asian Alone**  
**2.65% Hispanic Origin**

**SECONDARY SERVICE AREA DEMOGRAPHIC OVERVIEW**



**2021 Total Population**  
**23,766,036**



**2021 Total Households**  
**9,437,915**



**2021 Median Age**  
**40.5 years**



**2021 Median Household Income**  
**\$54,881**



**2021 Race**  
**77% White 14% Black Alone**  
**2% Asian Alone**  
**6.76% Hispanic Origin**

## METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in January 2022 and reflects actual numbers as reported in the 2010 Census (2020 data is not available at this time) as well as estimates for 2026 as obtained by ESRI. Straight line linear regression was utilized for 2031 and 2036 projections.

## RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; therefore, caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

- American Indian – This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian – This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black – This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander – This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White – This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino – This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

*Please Note: The Census Bureau defines Race as a person's self-identification with one or more of the following social groups: White, Black or African American, Asian, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, some other race, or a combination of these. While Ethnicity is defined as whether a person is of Hispanic / Latino origin or not. **For this reason, the Hispanic / Latino ethnicity is viewed separate from race throughout this demographic analysis.***

## SERVICE AREA POPULACE

This demographic analysis provides a basic understanding of the population characteristics of the residents that live within the primary and secondary service markets (two-hour and five-hour drive) of Clinch River State Park. The analysis that follows identifies multiple demographic characteristics of interest for this project including:

- Overall size of the service area populations by individuals, households, age segments, and race
- Economic status and spending power demonstrated by household income statistics
- Influence of demographic trends on recreation participation

## POPULATION AND HOUSEHOLDS

The total 2021 population of both the primary and secondary service area is estimated to be 21,674,528 comprised of 9,47,915 total estimated households. The population within the primary service area accounts for only 6% of the population within the five-hour drive (secondary service area) with an estimated 1,352,563 residents in 2021. A table summarizing the population of both the primary and secondary service areas is provided below (**See Figure 3**). These illustrate the population as accounted in the 2010 U.S. Census, and updated projections for 2021 and 2026<sup>1</sup>. Note the highlighted cells indicating that the degree of projected change expected in the primary service area is drastically different than the expected growth within the secondary service area.

	Estimated Primary Service Area Population	Estimated Primary Service Area Households	Estimated Secondary Service Area Population	Estimated Secondary Service Area Households
<b>2010</b>	1,310,927	540,843	21,674,528	8,599,438
<b>2021</b>	1,352,563	560,624	23,766,036	9,437,915
<b>2026</b>	1,358,409	563,840	24,725,551	9,823,597
<b>Growth from 2010 to 2021</b>	41,636	19,781	2,091,508	838,477
<b>% Change from 2010 to 2021</b>	3.2%	3.7%	9.6%	9.8%

Figure 3: Primary and Secondary Service Areas' Total Population and Households

## KEY TOTAL POPULATION AND HOUSEHOLD FINDINGS

The key findings of the total population and household analysis are detailed as follows:

1. The population of the primary service has not increased significantly in the last 10 years (0.29% annual growth rate) when compared with the national annual growth rate of 0.86%. The secondary service area population has grown by a much faster annual rate more comparable to the national average (0.88%).
2. The total population of the secondary service area population is substantially larger than the primary service area, indicating the potential for a significant number of visitors that could potentially originate from beyond a two-hour drive from the state park.
3. The growth in number of households is larger than the total population growth rate in both primary and secondary service areas indicating average household size is decreasing. This could be attributable to growth in the number of single individual and young family households.

<sup>1</sup> Detailed 2020 census data beyond total population is not currently available for this geography. In order to maintain data integrity throughout the entire demographics analysis, the 2021 estimates from ESRI were utilized.

AGE SEGMENTATION

Evaluating the service areas by age segments, the population of the primary services area is primarily older given that 37% are within the 55+ years age segment compared to 25% of the population falling within the 35-54 segment. The primary service area has a median age of 44.4 years old which is higher than the U.S. median age of 38.1 years. Assessing the population as a whole, the region is projected to continue its current aging trend. Over the next 15 years, the 55+ population is expected to grow to represent 44% of the region’s total population. This is largely due to the increased life expectancies and the remainder of the Baby Boomer generation shifting into the senior age groups. (See Figure 4a).

Incidentally, the population of the secondary service area is more middle-aged with a slight skew to older with 32% of the population at 55+ years of age. Over the next 15 years, the 55+ population is expected to grow to represent 37% of the region’s total population. This is illustrated in Figure 4b.

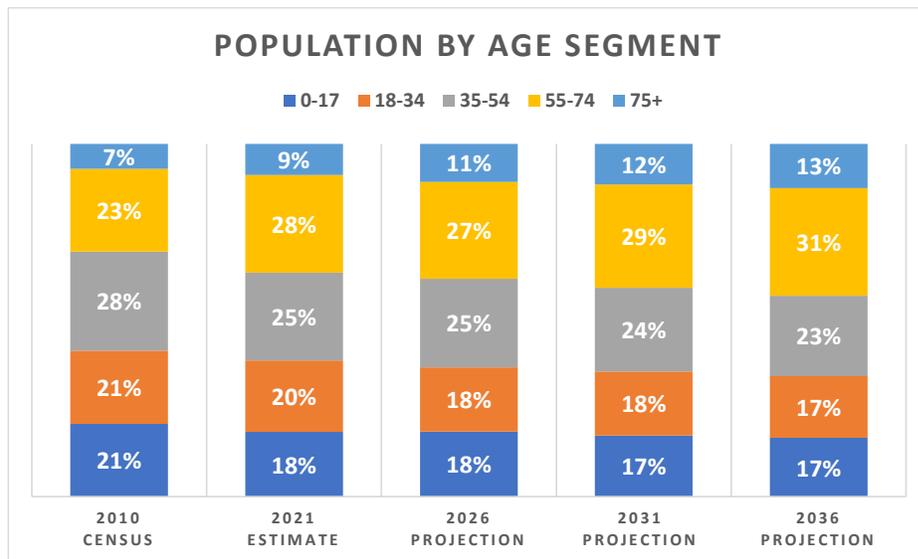


Figure 4a: Primary Service Area's Population by Age Segments

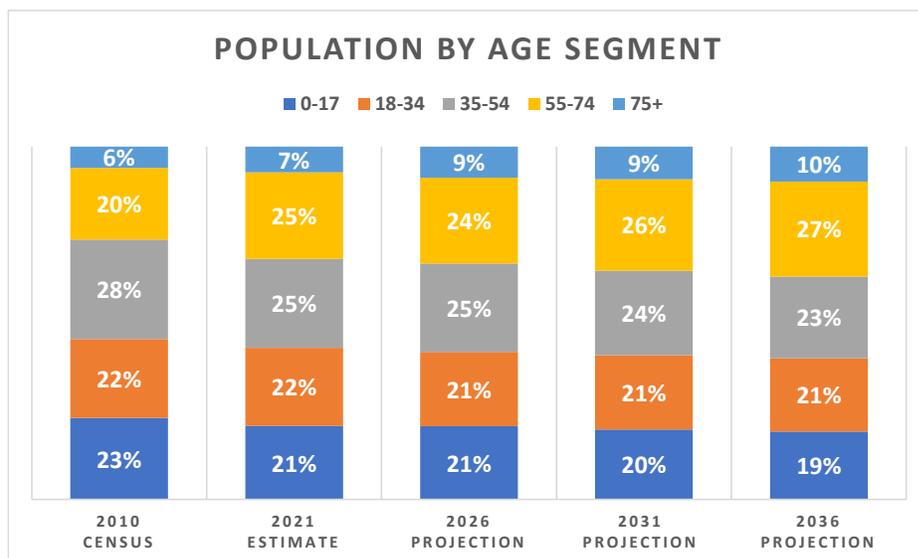


Figure 4b: Secondary Service Area's Population by Age Segments

## RACE

Analyzing race, the current population of both service areas current is mostly White Alone, with a considerably more diverse population in the secondary service area. This is attributable to the multiple major metropolitan areas included in the secondary region. The 2021 estimate shows that 93% of the population falls into the White Alone category within a two-hour drive of the park, while that category only comprises 77% of the population in the secondary service area. The Black Alone (13%) category by far represents the largest minority group in both regions. The racial diversification of the secondary service area is only slightly less diverse than the national population, which is approximately 70% White Alone, 13% Black Alone, and 7% Some Other Race. The predictions for 2036 expect both region’s population to continue diversifying at a fairly slow rate, with the White Alone population projected to decrease by only 3% as a proportion of the entire population and the minority categories expected to experience very slight increases. (Figures 5a and 5b)

## ETHNICITY

The region’s population was also assessed based on Hispanic/Latino ethnicity, which by the Census Bureau definition is viewed independently from race. It is important to note that individuals who are Hispanic / Latino in ethnicity can also identify with any of the racial categories from above. Based on the 2010 Census, it is estimated in 2021 those of Hispanic/Latino origin represent roughly 3% of the primary service area’s current population, which is significantly lower than the national average (18% Hispanic/Latino). The Hispanic/ Latino population of the secondary service area accounts for approximately 7% of the total population which is still below the national average. This portion of the population is expected to grow only slightly over the next 15 years in both service areas. (Figures 6a and 6b)

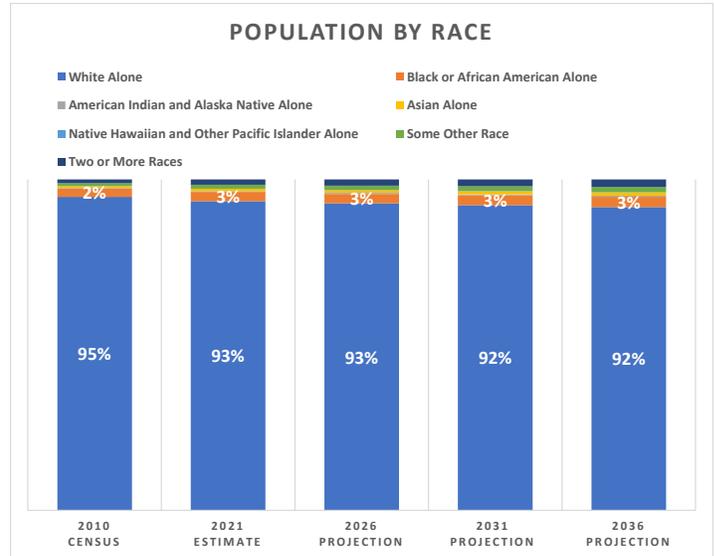


Figure 5a: Primary Service Area’s Population by Race

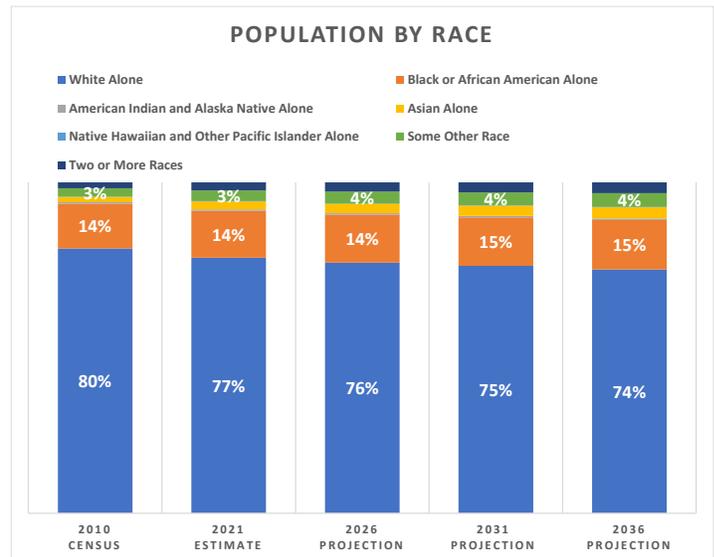


Figure 5b: Secondary Service Area’s Population by Race

Figure 6a: Primary Service Area’s Population by Ethnicity

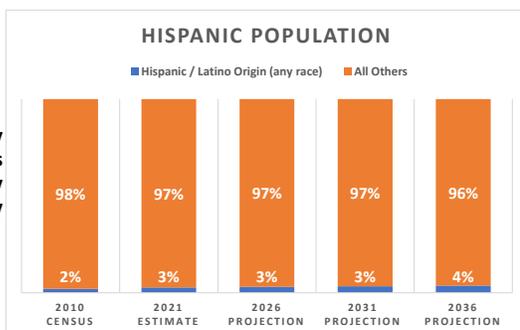
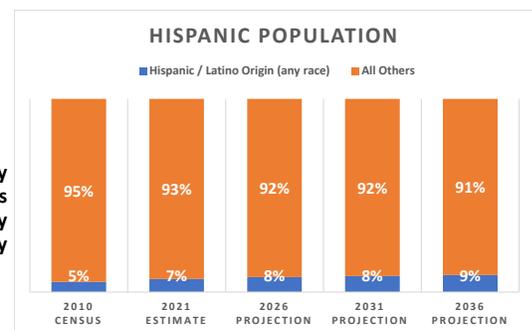


Figure 6b: Secondary Service Area’s Population by Ethnicity



HOUSEHOLD INCOME

The primary service area’s per capita income (\$24,374) and median household income (\$41,798) are considerably lower than current State of Virginia statistics (\$40,635 and \$74,456) and the national averages (\$35,672 and \$65,712). Incidentally, the secondary service area’s per capita income (\$30,564) and median household income (\$54,881) are still lower than current State of Virginia statistics, but closer to the national averages. Additionally, as seen in **Figures 7a and 7b**, both the per capita income and median household income of both regions are expected to grow modestly over the next 15 years. A comparison of income characteristics of the primary and secondary service areas with that of Virginia (state-wide) and the U.S. is provided in **Figures 8a and 8b**.

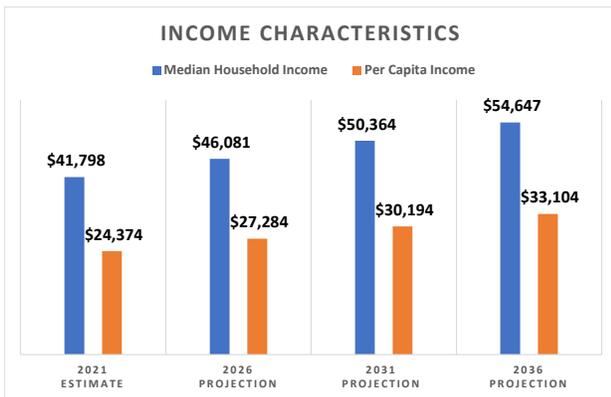


Figure 7a: Primary Service Area's Income Characteristics

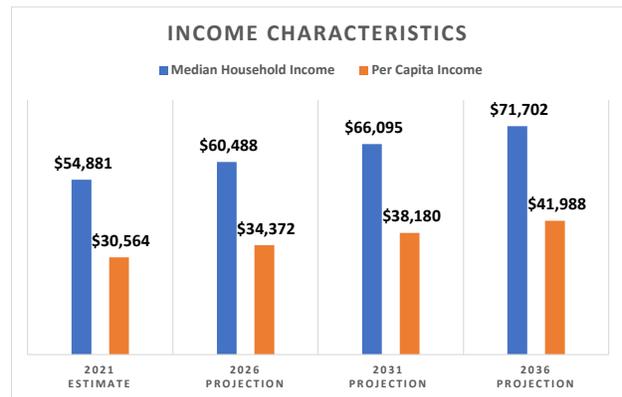


Figure 7b: Secondary Service Area's Income Characteristics



Figure 8a: Primary Service Area Comparative Income Characteristics

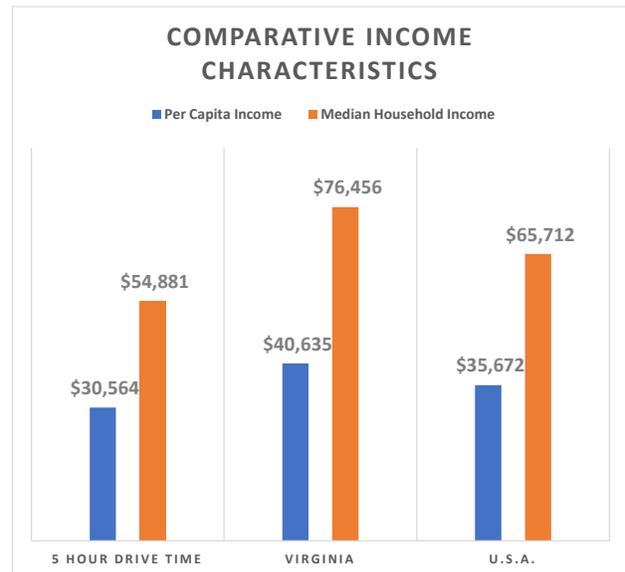
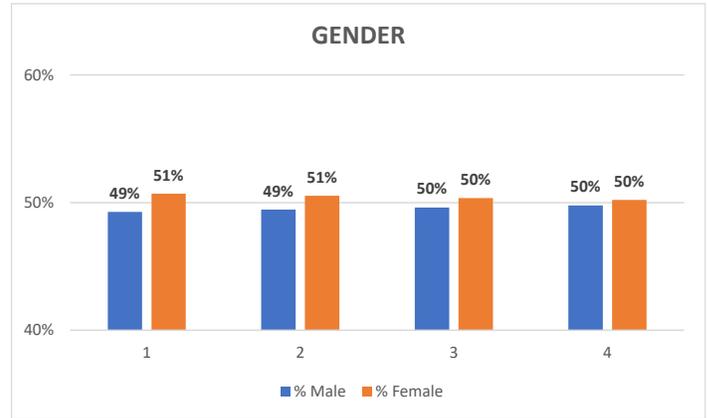


Figure 8b: Secondary Service Area Comparative Income Characteristics

## GENDER

Both primary and secondary services areas currently has a slightly higher female population (51%) than male (49%). This is expected to remain fairly unchanged over the next 15 years, as shown in **Figure 9**.



**Figure 9: Primary Service Area's Gender Breakdown**

## KEY DEMOGRAPHIC FINDINGS

- The primary service area's **population annual rate of change** (0.29%) is considerably slower than the national annual population growth rate (0.86%), but the secondary service area annual growth is more aligned with the national average (0.88%).
- The region's **average household size** is slightly less in both in both the primary service area (2.34) and secondary service area (2.45) than the national (2.53) average.
- When assessing **age segments**, the service area's reflects a predominantly middle-aged and older populace with continued growth in the proportion of older adults (55+ years) to the entire population anticipated over the next 10-15 years particularly within a two-hour drive of the state park.
- The region's **racial distribution** is mostly White Alone with a much larger population of those who identify as Black Alone in the secondary service market and small populations of people who identify as Asian or Some Other Race populations. Overall, this region is less diverse when compared to national percentage racial population distribution.
- The region's percentage of **Hispanic/Latino population** (primary service area = 2.65%; secondary service area = 6.67%) is significantly lower than the national average (18.3%).
- The primary service area's **per capita income** (\$24,374) and **median household income** (\$41,798) are both considerably lower when compared to Virginia's (\$40,635 and \$76,456) and the national (\$35,672 and \$65,712) income characteristics. The secondary service area income statistics (\$30,564 and \$54,881) are closer to the national averages, but remain lower than Virginia's state averages.

Additionally, we are seeing the annual trends detailed below in total population growth, growth of number of households including family households, number of owner-occupied households, and median household income over the next five years (2021-2026) in the broader secondary service market.

Trends: 2021-2026 Annual Rate			
Population			0.79%
Households			0.80%
Families			0.69%
Owner Households			0.96%
Median Household Income			1.96%

## RECREATION TRENDS ANALYSIS

The trends analysis is intended to provide an understanding of national, regional, and local recreational trends. This analysis examines participation trends, activity levels, and programming trends. It is important to note that all trends are based on current and/or historical patterns and participation rates.

### NATIONAL TRENDS IN RECREATION

#### METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Leisure Activities Topline Participation Report 2021* was utilized in evaluating the following trends:

- National Recreation Participatory Trends
- Core vs. Casual Participation Trends
- Non-Participant Interest by Age Segment



The study is based on findings from surveys carried out in 2020 by the Physical Activity Council (PAC), resulting in a total of 18,000 online interviews. Surveys were administered to all genders, ages, income levels, regions, and ethnicities to allow for statistical accuracy of the national population. A sample size of 18,000 completed interviews is considered by SFIA to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.32 percentage points at a 95 percent confidence level. Using a weighting technique, survey results are applied to the total U.S. population figure of 303,971,652 people (ages six and older).

The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S. This study looked at 118 different sports/activities and subdivided them into various categories including: sports, fitness, outdoor activities, aquatics, etc.

#### CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency of participation. Core participants have higher participatory frequency than casual participants. The thresholds that define casual versus core participation may vary based on the nature of each individual activity. For instance, core participants engage in most fitness activities more than 50-times per year, while for sports, the threshold for core participation is typically 13-times per year.

In a given activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than casual participants. This may also explain why activities with more core participants tend to experience less pattern shifts in participation rates than those with larger groups of casual participants.

#### INACTIVITY RATES / ACTIVITY LEVEL TRENDS

SFIA also categorizes participation rates by intensity, dividing activity levels into five categories based on the caloric implication (i.e., high calorie burning, low/med calorie burning, or inactive) and the frequency of participation (i.e., 1-50 times, 50-150 times, or above) for a given activity. Participation rates are expressed as 'super active' or 'active to a healthy level' (high calorie burning, 151+ times), 'active' (high calorie burning, 50-150 times), 'casual' (high calorie burning, 1-50 times), 'low/med calorie burning', and 'inactive'. These participation rates are then assessed based on the total population trend over the last five years, as well as breaking down these rates by generation.

## IMPACT OF COVID-19

229.7 million people ages 6 and over reported being active in 2020, which is a 3.6% increase from 2019 and the greatest number of active Americans since 2007. With a shift towards working remotely and children moved to virtual learning, free time increased. This, coupled with stay-at-home orders and general decisions to keep out of public places, put an emphasis on the public finding ways to occupy their time.

Participation in sports and activities that allowed people to be socially distant saw significant increases. These activities included pickleball, tennis, golf, trail running, skateboarding, surfing, day hiking, and recreational kayaking. In general, outdoor sports and racquet sports had the largest increase in participation compared to their 2019 numbers.

As could be expected, team sports, showed consistent drops in participation with all but 5 of the 23 tracked team sports showing decreases in overall participation. The team sports like Basketball and Soccer, that did show an increase of participation in 2020 can be attributed to recreational or backyard play, which is counter to the trend of the past decade.

With gyms and health clubs being forced to close in most of the country, fitness participation levels overall decreased in 2020. However, home fitness activities that can be practiced at home, like Yoga, Pilates, and Dumbbells/Hand Weights, showed significant participation increases, while activities done generally in health clubs, studios, or pools like Aquatic Exercise, Group Stationary Cycling, Stair-Climbing Machine, and Cardio Kickboxing, experienced substantial declines.

## NATIONAL RECREATION PARTICIPATORY TRENDS

While the SFIA report provides national trend data across a wide range of recreational activities including general sports and fitness, this trends analysis only focuses on that activities that could be relevant to programs, services and potential visitor experiences relevant to Clinch River State Park. Those activities include outdoor recreation and water sports / activities.

### NATIONAL TRENDS IN OUTDOOR RECREATION

#### PARTICIPATION LEVELS

Results from the SFIA report demonstrate strong growth in participation regarding outdoor/adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or with proper social distancing in a group, and are not as limited by time constraints. In 2020, the most popular activities, in terms of total participants, from the outdoor/adventure recreation category include: Day Hiking (57.8 million), Road Bicycling (44.5 million), Freshwater Fishing (42.6 million), Camping within ¼ mile of Vehicle/Home (36.1 million), and Recreational Vehicle Camping (17.8 million).



**Hiking  
(Day)**  
57.8 million



**Bicycling  
(Road)**  
44.5 million



**Fishing  
(Freshwater)**  
42.6 million



**Camping  
(<¼mi. of Car/Home)**  
36.1 million



**Camping  
(Recreational Vehicle)**  
17.8 million

### FIVE-YEAR TREND

From 2015-2020, Day Hiking (55.3%), BMX Bicycling (44.2%), Skateboarding (37.8%), Camping within ¼ mile of Vehicle/Home (30.1%), and Fly Fishing (27.3%) have undergone the largest increases in participation. The five-year trend also shows activities such as Adventure Racing (-31.4%), In-Line Roller Skating (-18.8%), Archery (-13.5%), and Traditional Climbing (-4.5%) to be the only activities with decreases in participation.

### ONE-YEAR TREND

The one-year trend shows almost all activities growing in participation from the previous year. The most rapid growth being in Skateboarding (34.2%), Camping within ¼ mile of Vehicle/Home (28.0%), Birdwatching (18.8%), and Day Hiking (16.3%). Over the last year, the only activities that underwent decreases in participation were Adventure Racing (-8.3%) and Archery (-2.7%).

### CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

A majority of outdoor activities have experienced participation growth in the last five- years. Although this a positive trend, it should be noted that all outdoor activities participation, besides adventure racing, consist primarily of casual users. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2015	2019	2020	5-Year Trend	1-Year Trend
Hiking (Day)	37,232	49,697	57,808	55.3%	16.3%
Bicycling (Road)	38,280	39,388	44,471	16.2%	12.9%
Fishing (Freshwater)	37,682	39,185	42,556	12.9%	8.6%
Camping (< 1/4 Mile of Vehicle/Home)	27,742	28,183	36,082	30.1%	28.0%
Camping (Recreational Vehicle)	14,699	15,426	17,825	21.3%	15.6%
Birdwatching (>1/4 mile of Vehicle/Home)	13,093	12,817	15,228	16.3%	18.8%
Fishing (Saltwater)	11,975	13,193	14,527	21.3%	10.1%
Backpacking Overnight	10,100	10,660	10,746	6.4%	0.8%
Bicycling (Mountain)	8,316	8,622	8,998	8.2%	4.4%
Skateboarding	6,436	6,610	8,872	37.8%	34.2%
Fishing (Fly)	6,089	7,014	7,753	27.3%	10.5%
Archery	8,378	7,449	7,249	-13.5%	-2.7%
Climbing (Indoor)		5,309	5,535	n/a	4.3%
Roller Skating, In-Line	6,024	4,816	4,892	-18.8%	1.6%
Bicycling (BMX)	2,690	3,648	3,880	44.2%	6.4%
Climbing (Traditional/Ice/Mountaineering)	2,571	2,400	2,456	-4.5%	2.3%
Climbing (Sport/Boulder)		2,183	2,290	n/a	4.9%
Adventure Racing	2,864	2,143	1,966	-31.4%	-8.3%

NOTE: Participation figures are in 000's for the US population ages 6 and over

<b>Legend:</b>	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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Figure 10: Outdoor / Adventure Recreation Participatory Trends

## NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

### PARTICIPATION LEVELS

The most popular water sports / activities based on total participants in 2020 were Recreational Kayaking (13.0 million), Canoeing (9.6 million), and Snorkeling (7.7 million). It should be noted that water activity participation tends to vary based on regional, seasonal, and environmental factors. A region with more water access and a warmer climate is more likely to have a higher participation rate in water activities than a region that has a long winter season or limited water access. Therefore, when assessing trends in water sports and activities, it is important to understand that fluctuations may be the result of environmental barriers which can greatly influence water activity participation.



**Kayaking**  
13.0 Million



**Canoeing**  
9.6 Million



**Snorkeling**  
7.7 Million



**Jet Skiing**  
4.9 Million



**Surfing**  
3.8 Million

### FIVE-YEAR TREND

Over the last five years, Surfing (40.7%), Recreational Kayaking (36.9%) and Stand-Up Paddling (21.7%) were the fastest growing water activities. White Water Kayaking (3.5%) was the only other activity with an increase in participation. From 2015-2020, activities declining in participation most rapidly were Boardsailing/Windsurfing (-28.2%), Water Skiing (-22.7%), Jet Skiing (-21.8%), Scuba Diving (-21.0%), Sea Kayaking (-18.5%), and Sailing (-15.0%).

### ONE-YEAR TREND

Similarly, to the five-year trend, Surfing (28.2%) and Recreational Kayaking (14.2%) also had the greatest one-year growth in participation, from 2019-2020. Activities which experienced the largest decreases in participation in the most recent year include: Boardsailing/Windsurfing (-9.8%), Sea Kayaking (-5.4%), and Water Skiing (-4.8%)

### CORE VS. CASUAL TRENDS IN WATER SPORTS/ACTIVITIES

As mentioned previously, regional, seasonal, and environmental limiting factors may influence the participation rate of water sport and activities. These factors may also explain why all water-based activities have drastically more casual participants than core participants, since frequencies of activities may be constrained by uncontrollable factors. These high causal user numbers are likely why a majority of water sports/activities have experienced decreases in participation in recent years. *Please see **Appendix A** for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Water Sports / Activities					
Activity	Participation Levels			% Change	
	2015	2019	2020	5-Year Trend	1-Year Trend
Kayaking (Recreational)	9,499	11,382	13,002	36.9%	14.2%
Canoeing	10,236	8,995	9,595	-6.3%	6.7%
Snorkeling	8,874	7,659	7,729	-12.9%	0.9%
Jet Skiing	6,263	5,108	4,900	-21.8%	-4.1%
Surfing	2,701	2,964	3,800	40.7%	28.2%
Stand-Up Paddling	3,020	3,562	3,675	21.7%	3.2%
Sailing	4,099	3,618	3,486	-15.0%	-3.6%
Rafting	3,883	3,438	3,474	-10.5%	1.0%
Water Skiing	3,948	3,203	3,050	-22.7%	-4.8%
Wakeboarding	3,226	2,729	2,754	-14.6%	0.9%
Kayaking (White Water)	2,518	2,583	2,605	3.5%	0.9%
Scuba Diving	3,274	2,715	2,588	-21.0%	-4.7%
Kayaking (Sea/Touring)	3,079	2,652	2,508	-18.5%	-5.4%
Boardsailing/Windsurfing	1,766	1,405	1,268	-28.2%	-9.8%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
<b>Legend:</b>	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 11: Water Sports/Activities Participatory Trends

## REGIONAL SPORTS AND LEISURE MARKET POTENTIAL

The following charts show sport and leisure market potential data for residents of the primary and secondary service areas, as provided by ESRI. Market Potential Index (MPI) measures the probable demand for a product or service within the defined service areas. The MPI shows the likelihood that an adult resident will participate in certain activities when compared to the U.S. national average. The national average is 100; therefore, numbers below 100 would represent lower than average participation rates, and numbers above 100 would represent higher than average participation rates. The service area is compared to the national average in two (2) categories –outdoor activity and commercial recreation.

MPI scores are a tool that DCR can use for consideration when starting new programs or developing new facilities and amenities. The market potential gives DCR a starting point for estimating resident attendance and participation for a broad set of recreational activities. **Of important note is that outdoor recreation participation trends for the secondary service area are reported as considerably higher than that of the primary service region, indicating that proportionally stronger visitation to Clinch River State Park is likely to originate from beyond a two-hour drive time from the park.**

MPIs for the primary service region’s residents generally demonstrate market potential figures ranging lower than the national average across all categories that were assessed. The top five activities based on MPI were Fresh Water Fishing (154), Overnight Camping in the Last 12 Months (109), Spent \$250+ on Sport and Rec Equipment (104), Spent \$1-99 on Sport and Rec Equipment (93), and Salt Water Fishing (92). **Only 12% of all activities assessed in the primary service area had MPI scores above the national average**, which suggests while the more local regional population may not be as inclined to utilize the state park facilities as those in the secondary service area.

MPIs for the secondary service area’s residents were still generally lower than national averages in most activities assessed, but higher than that of the primary service area. The top five activities based on MPI were Fresh Water Fishing (121), Spent \$250+ on Sport and Rec Equipment (104), Overnight Camping in the Last 12 Months (102), Spent \$1-99 on Sport and Rec Equipment (100), and Spent \$100-249 on Sport and Rec Equipment (99). Canoeing / Kayaking was close behind with an MPI of 98. **Only 15% of all activities assessed in the primary service area had MPI scores above the national average**

The following charts compare MPI scores for 26 sport and leisure activities that are prevalent for residents within the service regions relevant to the programs, services and visitor experiences most relevant to the future Clinch River State Park. The activities are categorized by activity type and listed in descending order, from highest to lowest MPI score. High index numbers (100+) are significant because they demonstrate that there is a greater likelihood that residents within the service areas will actively participate in offerings provided by the organization.

**OUTDOOR ACTIVITY MARKET POTENTIAL**

While the Outdoor Activity category featured the highest overall MPI score for any one activity across the categories analyzed, general Commercial Recreation scores were higher overall. Assessing MPI scores for the Outdoor Activity Category reveals only one activity in both service areas above national average MPI which was Fresh Water Fishing. The lowest activities based on MPI were Mountain Biking and Backpacking. **Figures 12a and 12b** below feature MPI scores for both the primary and secondary service areas.

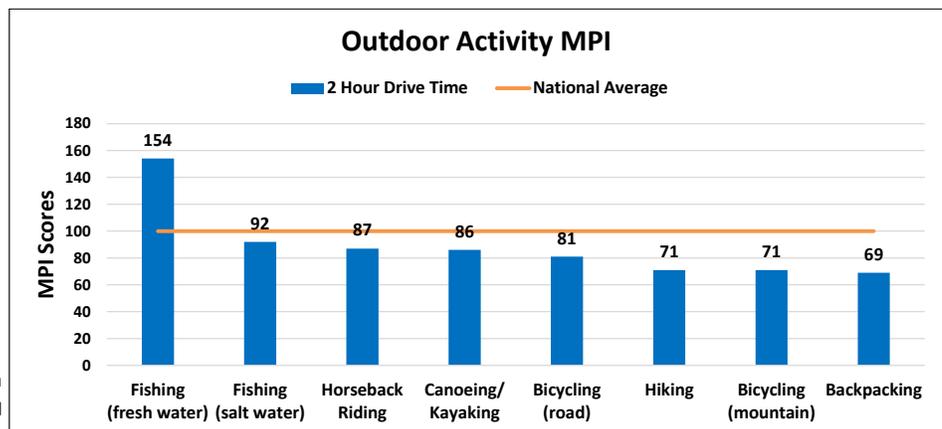


Figure 12a: Primary Service Area Outdoor/Adventure Activities MPI

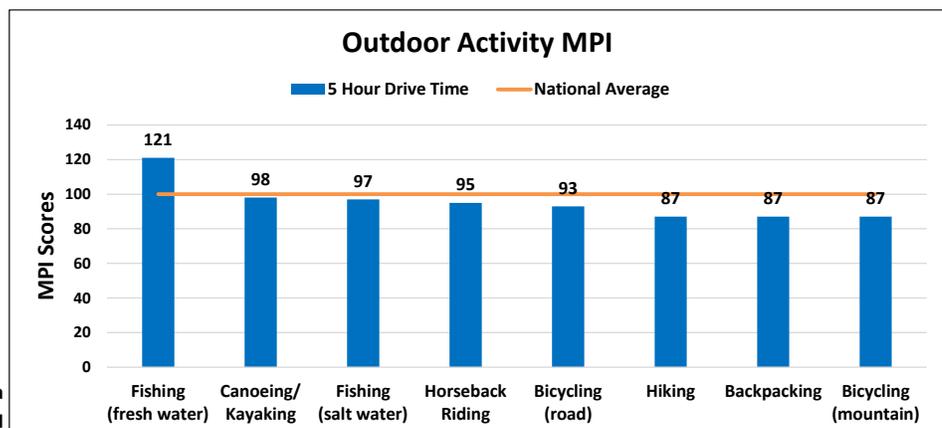


Figure 12b: Secondary Service Area Outdoor/Adventure Activities MPI

**COMMERCIAL RECREATION MARKET POTENTIAL**

The Commercial Recreation category also reveals a small number of activities with MPI scores above the national average in both the primary and secondary service areas. Relevant to the types of experiences relevant to Clinch River State Park, in both regions Spent \$250+ on Sports Rec Equipment and Went Overnight Camping in the Last 12 Months were among the highest MPI of all activities in this study. The lowest MPI activities were Went to a Dance Performance and Went to a Museum within the last 12 months. **Figures 13a and 13b** below and on the following page illustrate the MPI scores for 18 commercial recreation activities in both the primary and secondary service areas.

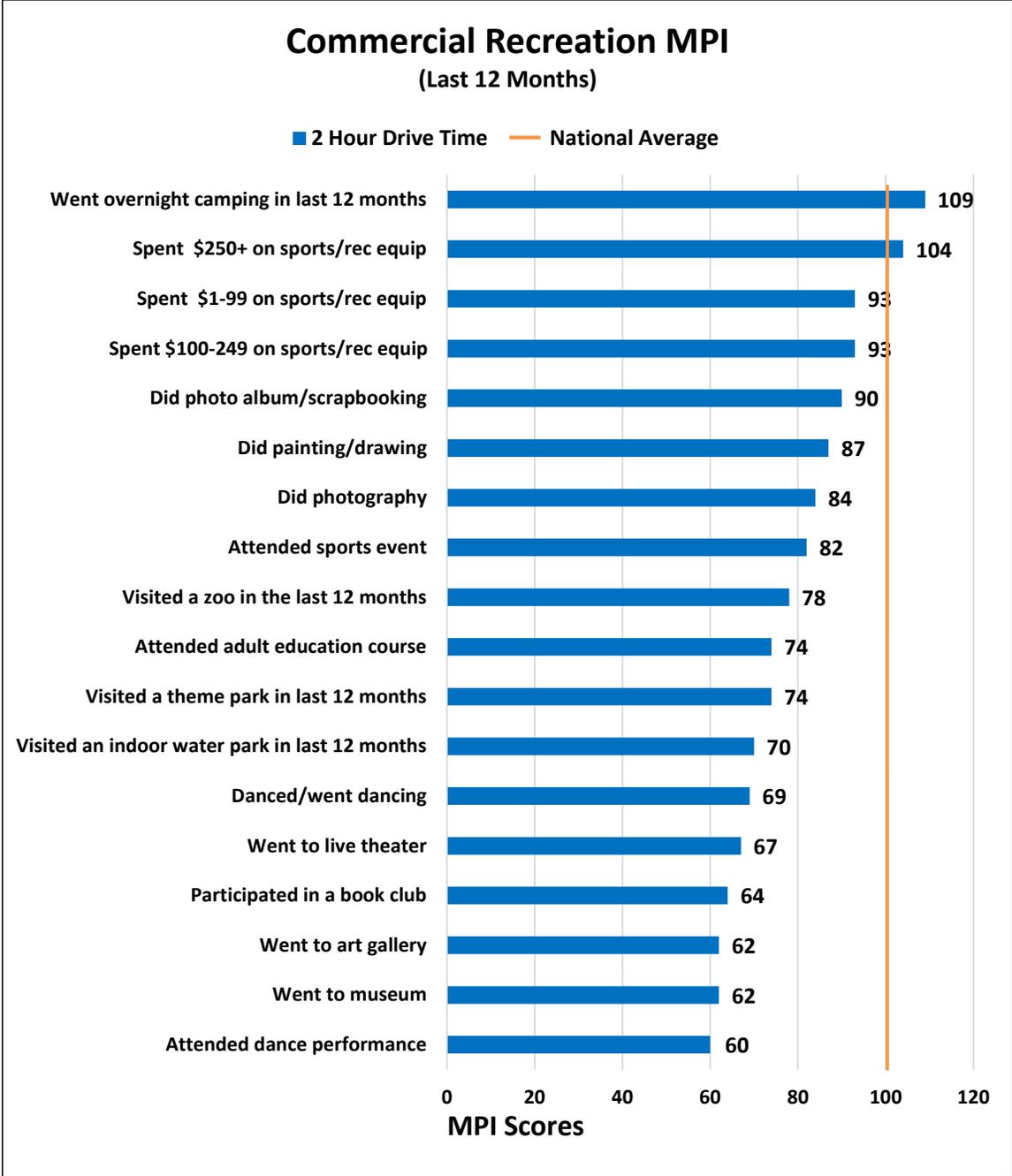


Figure 13a: Primary Service Area Commercial Recreation MPI

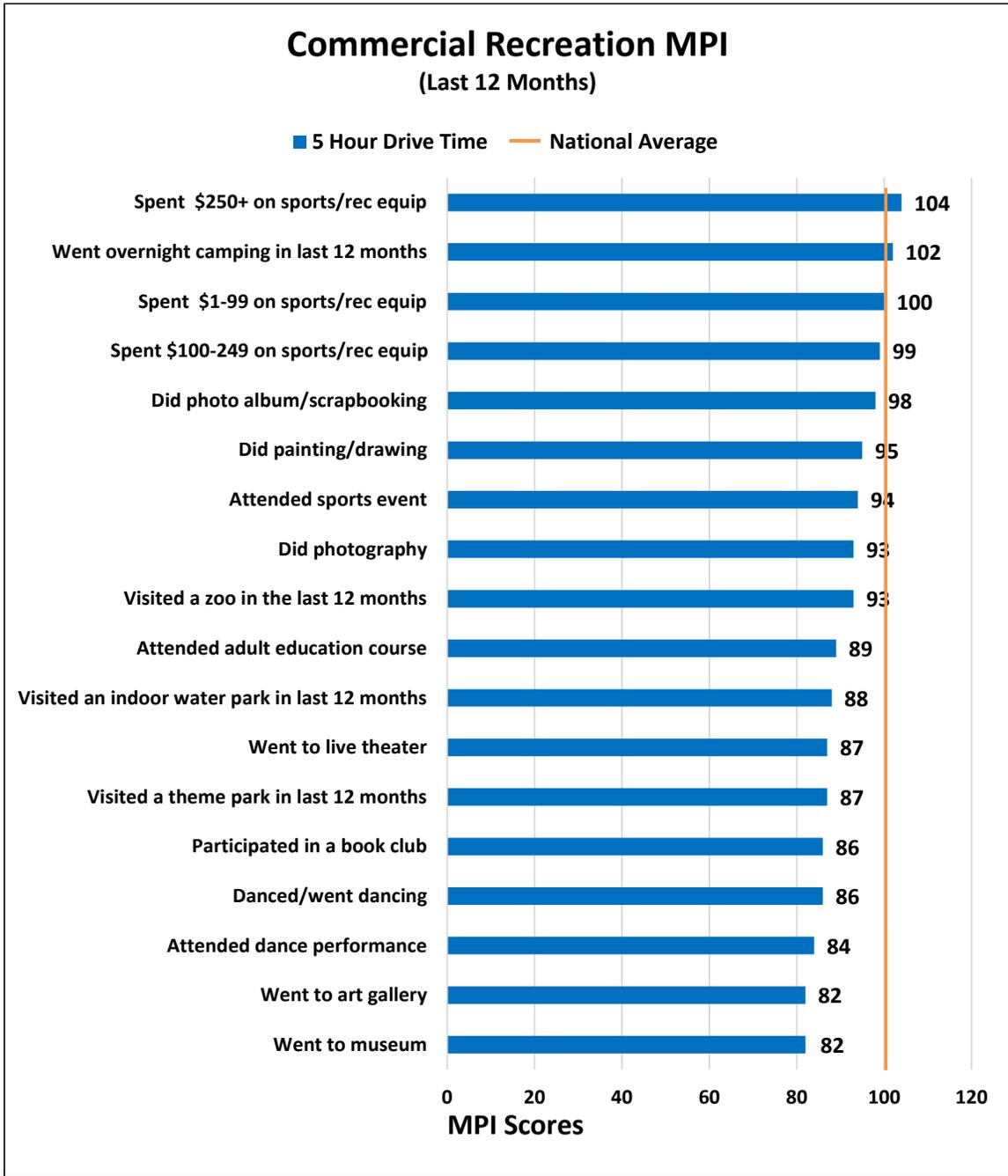


Figure 13b: Secondary Service Area Commercial Recreation MPI

### DETAILED OUTDOOR RECREATION PARTICIPATION RATES

Supporting these statistics are the findings from the recently completed *2021 Outdoor Recreation Participation Report*, conducted in 2020 by the Outdoor Industry Foundation. During the 2020 calendar year a total of 18,000 online interviews were carried out with a nationwide sample of individuals and households. The total panel has over one million members and is maintained to be representative of the US population.

Oversampling of ethnic groups took place to boost response from typically under-responding groups. A weighting technique was used to balance the data to reflect the total US population aged six and above. The following variables were used: gender, age, income, household size, region and population density. The total population figure used was 303,971,652 people aged six and above. The report details participation among all Americans, youth, young adults and adults.

From these results, a current and accurate picture of outdoor recreation participation trends can be ascertained. The following pages summarize some of the key findings associated with this report.<sup>2</sup>

Some of the activities with the greatest levels of participation that are relevant to this study are presented in the table below.<sup>3</sup> Participation is measured in millions of people and percentage of total U.S. population. Note the dramatic increase in total number of participants from 2019 to 2020, which is the single largest one-year jump in participation on record (**Figure 14**).

Activity	Participation (millions)	Percent of Population
Running, Jogging and Trail Running	63.8	21.0%
Hiking	57.8	19.0%
Freshwater, Saltwater and Flyfishing	54.7	18.0%
Road Biking, Mountain Biking and BMX	52.7	17.3%
Car, Backyard, Backpacking and RV Camping	47.9	15.8%

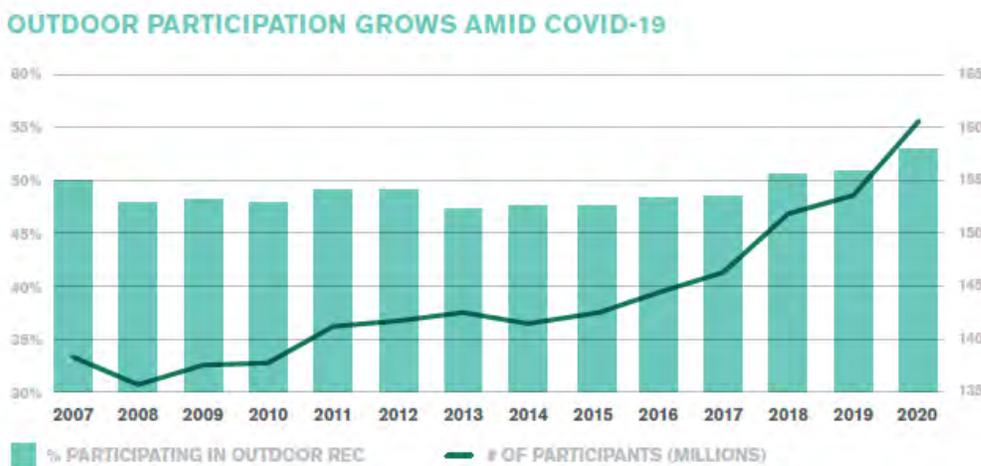


Figure 14: Outdoor Participation Trend 2007 - 2020

<sup>2</sup> Outdoor Industry Foundation. *Outdoor Recreation Participation Study: 2021*, 23rd Edition. Boulder, Colorado, 2021.

<sup>3</sup> Outdoor Industry Foundation. *Outdoor Recreation Participation Study: 2021*, 23rd Edition. Boulder, Colorado, 2021.

The tables below detail the most popular outdoor activities in 2020 by reported personal income, age segment, and race.<sup>4</sup>

Interest Level	Under \$25,000	\$25,000-\$49,000	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000+
1	Fishing	Fishing	Hiking	Hiking	Hiking
2	Hiking	Hiking	Fishing	Working out w/weights	Working out w/weights
3	Camping	Camping	Camping	Fishing	Yoga
4	Working out w/weights	Working out w/weights	Working out w/weights	Cardio Fitness	Cardio Fitness
5	Yoga	Yoga	Cardio Fitness	Working out w/ machines	Working out w/ machines

Interest Level	Ages 6-12	Ages 13-17	Ages 18-24	Ages 25-34	Ages 35-44	Ages 45-54	Ages 55-64	Ages 65+
1	Basketball	Basketball	Running	Running	Hiking	Hiking	Hiking	Fishing
2	Soccer	Fishing	Yoga	Hiking	Yoga	Fishing	Fishing	Hiking
3	Fishing	Running	Hiking	Cardio Fitness	Camping	Working out w/weights	Working out w/weights	Working out w/machines
4	Camping	Camping	Working out w/weights	Yoga	Cardio Fitness	Camping	Working out w/machines	Working out w/weights
5	Baseball	Hiking	Cardio Fitness	Working out w/weights	Working out w/weights	Cardio Fitness	Cardio Fitness	Swimming for Fitness

Interest Level	Asians	African Americans	Hispanics	Whites
1	Running, Jogging and Trail Running 25%	Running, Jogging and Trail Running 17%	Running, Jogging and Trail Running 21%	Hiking 22%
2	Hiking 22%	Road Biking, Mountain Biking and BMX 12%	Road Biking, Mountain Biking and BMX 17%	Freshwater, Saltwater and Fly Fishing 19%
3	Road Biking, Mountain Biking and BMX 16%	Freshwater, Saltwater and Fly Fishing 11%	Hiking 17%	Car, Backyard, Backpacking and RV Camping 18%
4	Car, Backyard, Backpacking and RV Camping 12%	Car, Backyard, Backpacking and RV Camping 7%	Car, Backyard, Backpacking and RV Camping 16%	Road Biking, Mountain Biking and BMX 17%
5	Freshwater, Saltwater and Fly Fishing 10%	Hiking 6%	Freshwater, Saltwater and Fly Fishing 14%	Running, Jogging and Trail Running 16%

<sup>4</sup> Outdoor Industry Foundation. Outdoor Recreation Participation Study: 2021, 23rd Edition. Boulder, Colorado, 2021.

The table below details the percentage of Americans over six years of age that participate in outdoor recreation activities most closely linked to the activities and focus of the future Clinch River State Park. Participation rates are reported for all Americans aged six years and older.<sup>5</sup> Note the activities and percentage participation rates highlighted in yellow as these are the activities that experienced the greatest increase in participation as a percentage of the total population from 2018-2020. These activities and their percent growth in participation were Day Hiking (+3.1%), Camping (+1.9%), and General Fishing (+1.6%).

Activity	2018		2019		2020	
	#(000's)	%	#(000's)	%	#(000's)	%
Backpacking overnight	10,540	3.5%	10,660	3.5%	10,746	3.5%
Bicycling (mountain)	8,690	2.9%	8,622	2.8%	8,998	3.0%
Birdwatching	12,344	4.1%	12,817	4.2%	15,228	5.0%
<b>Camping (Car, Backyard, Backpacking, RV)</b>	41,674	<b>13.9%</b>	41,757	13.8%	47,935	<b>15.8%</b>
Canoeing	9,129	3.0%	8,995	3.0%	9,595	3.2%
Fishing (Fly)	6,939	2.3%	7,014	2.3%	7,753	2.6%
<b>Fishing (Fly, Salt, Fresh)</b>	49,423	<b>16.4%</b>	50,165	16.6%	54,744	<b>18.0%</b>
Fishing (Freshwater, Other)	38,998	13.0%	39,185	12.9%	42,556	14.0%
<b>Hiking (Day)</b>	47,860	<b>15.9%</b>	49,697	16.4%	57,808	<b>19.0%</b>
Kayak Fishing	2,535	0.8%	2,748	0.9%	3,016	1.0%
Kayaking (Recreational)	11,017	3.7%	11,382	3.8%	13,002	4.3%
Rafting	3,404	1.1%	3,438	1.1%	3,474	1.1%
Trail Running	10,010	3.3%	10,997	3.6%	11,854	3.9%
Wildlife Viewing	20,556	6.8%	20,040	6.6%	21,038	6.9%

<sup>5</sup> Outdoor Industry Foundation. Outdoor Recreation Participation Study: 2021, 23rd Edition. Boulder, Colorado, 2021.

## SERVICE PROVIDER ANALYSIS

A key component of the Market Analysis and Business Plan is conducting a Service Provider Analysis of facilities and services in the near vicinity of Clinch River State Park. The purpose of this analysis is to identify direct and indirect similar service providers related to the potential amenities and services that can be developed at the state park that can support visitation to the park, as well as the park supporting usage of the facilities and services of these regional providers. This assessment targeted notable parks, private providers, and sites that feature notable day-use and overnight facilities with similar offerings as those identified in the visioning process for the state park.

### IMPROVED OVERNIGHT STAYS – CABINS AND LODGES

There are several privately operated cabins and lodges within the vicinity of the multiple units that will make up Clinch River State Park once fully developed. An evaluation of these facilities was conducted for all providers within 50 miles of a Clinch River State Park unit. Those facilities, as well as basic descriptions are provided in the table below and following page based on geography. There are a total of 13 improved overnight stay facilities within the region of the park.

Site / Facility	Address	Phone	Notes
<b>Near St. Paul / Castlewood, VA</b>			
<b>Mountain View Lodge</b>	16602 Wise Street St. Paul, VA 24283	276-395-0546	Suites and studios; Nine (9) rooms
<b>Beef Holler Lodge</b>	Castlewood, VA 24224	727-863-6091	2-bedroom cabin; pond, trails and cave to explore
<b>West: Big Stone Gap / Duffield / Keokee / Dryden</b>			
<b>Appalachian Mountain Cabins</b>	126 Appalachian Drive Duffield, VA 24244	877-299-8123	Four cabins sleeping 4-8 people
<b>Natural Tunnel State Park</b>	1420 Natural Tunnel Pkwy Duffield, VA 24244	276-940-2674	14 cabins sleeping 6-8 people; 6- bedroom lodge, Lodge that sleeps 48, and 4 yurts
<b>Southwest Virginia Museum Historical State Park</b>	10 W 1 <sup>st</sup> Street N Big Stone Gap, VA 24219	276-523-1322	Single cottage sleeps 8 people
<b>Northwest: Norton / Wise / Coeburn / Pound / Jenkins (KY)</b>			
<b>Black Bear Cabin Rentals, LLC</b>	211 Scarlett Lane Neon, KY 41840	606-634-2372	2-bedroom cabin
<b>North: Grundy / Elkhorn City (KY) / Clintwood / Haysi</b>			
<b>Knotty Poplar Cabins</b>	1211 Woods Fork Road Grundy, VA 24614	423-534-7204	8-person and 10- person cabin
<b>Southern Gap Outdoor Adventure</b>	1124 Shipping Sparrow Road Grundy, VA 24614	276-244-1111	Five cabins sleeping 7-10 people
<b>Breaks Interstate Park</b>	627 Commission Circle Breaks, VA 24607	276-865-4413	9 cabins, 70-room lodge, 1 yurt

Site / Facility	Address	Phone	Notes
<b>East: Abingdon / Damascus / Glade Spring / Chilhowie / Saltville</b>			
<b>Damascus Cabins Sales and Rentals</b>	127 E. Imboden Street Damascus, VA 24236	276-492-1041	Five cabins sleeping 2-5 people
<b>Creep Trail Cottages</b>	553 Adkins Street Damascus, VA 24236	276-451-8342	Five cabins sleeping 2-6 people
<b>River Trail Cabins</b>	726 N Beaver Dam Ave Damascus, VA 24236	276-628-8123	Three cabins sleeping 2-4 people
<b>Laurel Run Cabins</b>	22405 Jeb Stuart Hwy Damascus, VA 24236	336-362-1372	Three cabins sleeping 2-4 people
<b>Raven Ridge Lodge</b>	21704 Raven Ridge Saltville, VA 24370	276-889-1299	Single lodge sleeping 6 people
<b>South: Gate City / Weber City / Kingsport (TN) / Bristol (VA/TN) / Church Hill (TN)</b>			
<b>Boone's Pointe Cabins</b>	VA-224 Gate City, VA 24251	276-494-1077	Unclear number of cabins sleeping 2-4 people
<b>Butterfly Blessing Chalets and Cabin Rentals</b>	712 E Main Blvd Church Hill, TN 37642	423-357-8109	Information not available

Aside from the large number of cabins and lodging available at Natural Tunnel State Park and Breaks Interstate Park, these facilities range from highly professional operations with multiple cabins or rooms available for rent to a small number of facilities that have little or no information available about the facilities and those that can only be rented through third-party rental aggregation sites (AirBnB, Bookings.com, etc.). The largest of the private facilities is Damascus Cabins Sales and Rentals and Creep Trail Cottages both located east of the state park and with five individual cabins each. Additionally, Mountain View Lodge in St. Paul which is closest to the Sugar Hill Unit of the state park has nine rooms available for overnight stay. There are only two public parks (state, county or local) within 50 miles of Clinch River State Park that feature improved overnight accommodations, and both are west of the park.

## CAMPGROUNDS

There are far more campgrounds within 50 miles of Clinch River State Park than improved overnight accommodations, with the vast majority being private campgrounds. Those facilities, as well as basic descriptions are provided in the table below and following pages based on geography. There are a total of 36 campground facilities within the relative proximate region of the park.

Site / Facility	Address	Phone	Notes
<b>Near St. Paul / Castlewood, VA</b>			
<b>Maggie Way Campground</b>	3418 Hidden Acres Road St. Paul, VA 24283	276-762-4597	25 RV hook-up sites, bathhouse and fish pond
<b>Ridge Runner Campground</b>	4111 Russell Creek Road St. Paul, VA 24283	276-455-0550	28 RV hook-up sites
<b>West: Big Stone Gap / Duffield / Keokee / Dryden</b>			
<b>Squatchy Adventures</b>	1750 Clinch River Hwy Duffield, VA 24244	276-202-6074	4 RV hook-up sites and 4 tent sites
<b>Clinch River Life</b>	15264 US-23 N Duffield, VA 24244	276-690-9199	5 tent and RV sites

Site / Facility	Address	Phone	Notes
<b>West: Big Stone Gap / Duffield / Keokee / Dryden (continued)</b>			
Clinch River Family Campground	7237 Anglers Way Road Duffield, VA 24244	877-254-6247	27 RV Hook-up sites, and 20 electric/water sites
Cave Springs Campground / Recreation Area (NFS)	State Road 845 Dryden, VA 24243	276-546-4297	21 electric hook-up sites and 20 tent sites
Natural Tunnel State Park	1420 Natural Tunnel Pkwy Duffield, VA 24244	276-940-2674	34 electric/water sites and primitive camping
<b>Northwest: Norton / Wise / Coeburn / Pound / Jenkins (KY)</b>			
Flag Rock Recreation Area	Route 619/Flag Rock Rd Norton, VA 24273	276-679-0754	18 electric/water sites
Flatwood Campground (NFS)	1700 Park Ave SW Norton, VA 24273	276-679-8370	Primitive sites only
Lonesome Pine RV Park	11414 Norton-Coeburn Road Coeburn, VA 24230	276-393-4437	24 RV sites
Bark Camp Recreation Area (NFS)	1700 Park Ave SW Norton, VA 24273	276-679-8370	Primitive sites only
Cane Patch Campground (NFS)	1700 Park Ave SW Norton, VA 24273	276-679-8370	Primitive sites only
High Knob Recreation Area (NFS)	1700 Park Ave SW Norton, VA 24273	276-679-8370	Primitive sites only
Laurel Fork Campground	1700 Park Ave SW Norton, VA 24273	276-679-8370	Primitive sites only
<b>North: Grundy / Elkhorn City (KY) / Clintwood / Haysi</b>			
Southern Gap Outdoor Adventure	1124 Shipping Sparrow Road Grundy, VA 24614	276-244-1111	19 RV hook-up sites and primitive camping area
Mountain Top Campground	100 Kiwanis Park Road Haysi, VA 24256	276-218-0271	18 RV hook-up sites and 18 primitive tent sites
Thunder River Campground	1558 Spashdam Road Haysi, VA 24256	276-701-9876	10 RV hook-up sites and 10 primitive tent sites
Cranesnest Campground	192 White Water Road Haysi, VA 24256	276-835—9544	20 primitive sites
Lower Twin Campground	192 White Water Road Haysi, VA 24256	276-835—9544	25 primitive sites
Pound River Campground	1182 Pound River Campground Road Clintwood, VA 24228	276-835-9544	22 primitive sites
Breaks Interstate Park	627 Commission Circle Breaks, VA 24607	276-865-4413	138 RV hook-up / tent sites
<b>Northeast: Cleveland / Lebanon / Honaker / Richlands, Raven / Claypool Hill</b>			
Cleveland Riverbend Campground	6654 Cleveland Road Cleveland, VA 24225	276-889-4365	Five RV sites and primitive tent area

Site / Facility	Address	Phone	Notes
<b>East: Abingdon / Damascus / Glade Spring / Chilhowie / Saltville</b>			
<b>Wolf Lair Campground</b>	19091 County Park Road Abingdon, VA 24211	276-739-8004	56 RV hook-up sites and safari tent
<b>Lakeshore Campgrounds</b>	19417 County Park Road Abingdon, VA 24211	276-628-5394	200 RV and tent sites
<b>Callebs Cove Campground</b>	25136 Whitaker Hollow Road Abingdon, VA 24211	276-475-5222	Multiple RV sites
<b>Damascus Creekside RV Park</b>	111 S Railroad Ave Damascus, VA 24236	276-475-5276	Multiple RV sites
<b>Laurel Creek RV Park</b>	812 Orchard Hill Road Damascus, VA 24236	276-477-3656	21 RV hook-up sites
<b>Brumley Cove Baptist Camp</b>	21530 Brumley Gap Road Abingdon, VA 24210	276-944-4673	Information not available
<b>Riverside Campground</b>	18496 N Fork River Road Abingdon, VA 24210	276-623-0340	94 RV hook-up sites and 20 electric/water tent sites
<b>Rainbow Campground</b>	4372 Tumbling Creek Rd Saltville, VA 24370	276-944-4243	Multiple RV hook-up sites and electric/water tent sites
<b>South: Gate City / Weber City / Kingsport (TN) / Bristol (VA/TN) / Church Hill (TN)</b>			
<b>Suga Hollow Park</b>	23261 Sugar Hollow Road Bristol, VA 24202	276-645-7275	75 campsites
<b>Cochran's Lakeview Campground</b>	821 Painter Creek Road Bristol, TN 37620	423-878-8045	Information not available
<b>Peace Lakeview Campground</b>	846 TN-44 Bristol, TN 37620	423-534-5716	Information not available
<b>Observation Knob Park</b>	553 Knob Park Road Bristol, TN 37620	423-878-1881	Multiple RV hook-up sites
<b>Backbone Rock Campground (NFS)</b>	10585 TN-133 Shady Valley, TN 37688		10 primitive tent sites
<b>Warrior's Path State Park</b>	490 Hemlock Road Kingsport, TN 37663	423-239-8531	94 RV hook-up / tent sites

The vast majority of the campgrounds located within 50 miles of Clinch River State Park are privately-owned and operated, with six predominantly primitive campgrounds operated by the National Forest Service (NFS), and three state parks with more developed campgrounds. The private campgrounds range from large, highly professional operations to more simple operations with limited infrastructure and information available. Several campgrounds feature day-use amenities such as pavilions, bath houses, natural water access (river, lake or pond), and multi-use open areas. Campgrounds located within NFS lands or state parks also feature extensive trail and other outdoor recreation opportunities on-site, however NFS campgrounds are primitive and offer no water or electric utilities.

## OUTFITTERS

In several regions within 50 miles of the Clinch River State Park sites there are outfitter operators that provide a variety of equipment provision and guided services. These primarily include guided and unguided ATV experiences, mountain biking, canoeing, kayaking and fishing. Those service providers, as well as basic descriptions are provided in the table below and following pages based on geography. There are a total of nine (9) known outfitters operating within 50 miles of the state park.

Outfitter	Address	Phone	Notes
<b>Near St. Paul / Castlewood, VA</b>			
<b>Clinch Life Outfitters</b>	3022 5 <sup>th</sup> Avenue St. Paul, VA 24283	276-608-6907	Kayak rentals, guided kayaking, guided fishing
<b>Clinch River Adventures</b>	16642 E. Riverside Drive St. Paul, VA 24283	276-275-4154	Tube and kayak rental, shuttle service
<b>Esembee Adventure Company</b>	3051 4 <sup>th</sup> Avenue St. Paul, VA 24283	276-455-0550	ATV, kayak, tube, mountain bike, and fishing gear rentals; shuttle service
<b>West: Big Stone Gap / Duffield / Keokee / Dryden</b>			
<b>Squatchy Adventures</b>	1750 Clinch River Hwy Duffield, VA 24244	276-202-6074	Kayak and tube rentals
<b>Clinch River Life</b>	15264 US-23 N Duffield, VA 24244	276-690-9199	Tube rentals and shuttle service
<b>Iron Works Cycling and Outdoor Adventure</b>	520 Wood Avenue E Big Stone Gap, VA 24219	276-207-8232	Mountain bike and kayak sales and repair services
<b>Northwest: Norton / Wise / Coeburn / Pound / Jenkins (KY)</b>			
<b>Pathfinder Outdoor Adventures and High Knob Outfitters</b>	534 Park Ave Norton, VA 24273	276-219-4001 276-219-4002	Kayak, standup paddle board, and canoe rentals
<b>Northeast: Cleveland / Lebanon / Honaker / Richlands, Raven / Claypool Hill</b>			
<b>OAC Outfitters</b>	Pounding Mill, VA	276-971-3038	Tour and booking agency
<b>East: Abingdon / Damascus / Glade Spring / Chilhowie / Saltville</b>			
<b>Adventure Damascus Bike Rental and Shuttle Company</b>	331 Douglas Drive Damascus, VA 24236	276-475-6262	Mountain bike rental and shuttle service

While there are fewer campgrounds and improved overnight accommodations in the immediate vicinity of the Sugar Hill tract of Clinch River State Park near St. Paul, Virginia, some of the more established outfitters supporting recreation on the river through both fishing and kayaking that also provide shuttle service are located in this area. The only other region with a concentration of more well established outfitters is west of the park near the community of Duffield, Virginia.

## SERVICE PROVIDER ANALYSIS CONCLUSIONS

Based on a summary of the service provider analysis, there are several conclusions that are relevant for this Market Analysis and Business Plan for Clinch River State Park. This assessment identified that among the amenities and visitor experiences considered for the study site to meet the desired goals and objectives for DCR, improved overnight accommodations, RV and tent camping, with a select set of day-use amenities to enrich the overnight visitor experience as well as activate the site for day-use opportunities is the primary recommendation. The service provider analysis revealed a few key points:

- While there are a multitude of improved overnight accommodations within 50 miles of the Clinch River State Park sites, the majority of those are west, north and east of the park with the largest facilities being Natural Tunnel State Park (36 miles from St. Paul) and Breaks Interstate Park (45 miles from St. Paul). There are very few improved accommodations in the near vicinity of the Sugar Hill tract of the state park, which is where the likely potential of these amenities would be located.
- Similar to improved overnight accommodations, the presence of existing campgrounds is strong within 50 miles of the state park but not in the immediate vicinity of the Sugar Hill tract. There are two existing campgrounds in that area that are well established and primarily cater to RV campers. There could be other campground opportunities to consider at Clinch River State Park sites depending on the presence of other providers and the level of service being evaluated for the state park experience (primitive vs. improved camping).
- There are several outfitters operating within 50 miles of Clinch River State Park and some of the most established services are present in the near vicinity of St. Paul and the Sugar Hill tract. This favors potential day-use activation, as well as value-added visitor experiences for overnight guests at the state park unit located there.

**CONCLUSION 1:** There is moderate-strong market potential for improved overnight accommodations at the Sugar Hill tract of Clinch River State Park.

**CONCLUSION 2:** There is moderate-strong market potential for an improved campground that supports RVs and tent campers at the Sugar Hill tract, as well as potentially limited camping at other sites of Clinch River State Park.

**CONCLUSION 3:** Existing outfitters and guide services are well positioned in several regions within 50 miles of Clinch River State Park to offer supported experiences for both day-use and overnight visitors to the park.

## VISITATION AND USAGE PROJECTIONS

The process to develop visitation and usage projections for Clinch River State Park requires the view of the individual units of the park (ie. Artrip Bent and Sugar Hill) operating in tandem with one another. It is extremely difficult at this planning stage to definitively estimate the market draw of individual units. It is most likely that the connectivity between the sites and existing access points along the Clinch River is what creates the largest appeal for most visitors.

It is expected that the Sugar Hill unit will most likely see a greater amount of day-use given the proximity to the St. Paul community and the allure of daily trail usage. The Artip unit will see incidental day-use, but its qualities and location are more likely to be used predominantly as an overnight camping or lodging location from where visitors can either just stay the night and/or stage a trip down the Clinch River. Estimated local day-use of both sites will impact design of desired parking capacity but are not as relevant in developing defensible recommendations on properly sizing campgrounds and overnight accommodations. The projections included in this analysis take into account potential local day-use but are more aligned to the larger market characteristics of the primary and secondary service markets as identified in the preceding market analysis.

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### POTENTIAL VISITATION PROJECTIONS

Visitation projections for the experiences possible at Clinch River State Park were derived from a multi-step process that has proven to be reliable in numerous previous studies conducted for similar projects. This process involves the components described below.

1. Identification of user market size and characteristics
2. Identification of relevant outdoor recreation participation trends
3. Application of participation trend data to user markets + tourism data
4. Estimation of market capture rate

The details within each of these components are provided in the sections that follow.

#### USER MARKET SIZE AND CHARACTERISTICS

The user market of the project will predominantly serve two areas – the primary service market (two-hour drive time) and the secondary service market which is comprised of residents from within a two-hour to five-hour drive. Additionally, existing tourism in the region is expected to significantly contribute to usage of the sites and services of the park. There will be potentially significant incidental traffic to the sites from residents and visitors to the area that are outside of both of these user markets, but for the sake of prudence and reliable market planning these user markets are considered to be the source of at least 75% of the site’s potential visitors.

All market characteristics are taken into account when developing usage projections, but the following characteristics have the heaviest influence on determining market capture rates:

- **Primary Service Market (Two-hour drive time)**
  - 1,352,563 residents
  - Largest age segment = 55-74 years
  - Largest household income segment = \$50-75K annually
- **Secondary Service Market (Two-hour to five-hour drive time)**
  - 22,413,473 residents
  - Largest age segment = 55-74 years
  - Largest household income segment = \$50-75K annually

## USING MARKET DATA TO PROJECT USAGE

Relevant outdoor recreation participation trends that were analyzed for the Clinch River State Park developments were overall participation in outdoor recreation activities, and participation in multiple related outdoor recreation categories – general users, recreational canoeing/kayaking, whitewater canoeing/kayaking, and camping. These participation rates will help to develop a core, or base, of participants of the programs, services, and experiences of the park. Incidental traffic from tourists or out-of-market visitors will likely be captured in the overall participation rate in outdoor recreation. The following participation rates are the heaviest influence on determining user market size:

- Outdoor recreation participation (overall) = 53%
- Non-whitewater paddling participation = 4.3%
- Whitewater paddling participation = 0.9%
- Camping = 15.8%

## APPLYING PARTICIPATION TRENDS TO USER MARKETS

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For the purpose of these usage projections and operational models, the classifications of potential users discussed below are aligned with participation trends. These user classifications have been developed based upon the direct experience of existing whitewater park operators and the predominate usage of those facilities.

### GENERAL USER

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The general user are those individuals, families, and groups that may have little or no previous experience or technical skills in paddling rivers, but are inclined to participate in the programs, services, and experiences of the river recreation and general state park services and amenities envisioned for these sites. They are likely to own all their own camping equipment or RV, and possibly own canoes or kayaks they may bring with them for a Clinch River State Park experience. Those that do not own watercraft are likely to be inclined to rent boats or hire a guide service. These are also users that could just be looking for a scenic and safe place to camp or stay the night and enjoy the parks' amenities.

**The general user market will be determined based upon 53% of the population.**

### NON-WHITewater PADDLERS (INCLUDES RAFTING)

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Non-whitewater paddlers are individuals, families, and groups that have recreational paddling and/or rafting experience and possible equipment of their own. These users will tend to be older adults and new entrants into paddle sports, and likely have limited experience in whitewater paddling. Non-whitewater paddlers will likely participate in equipment rentals and self-guided experiences, and more likely to participate in instructional clinics and services as they transition their skills to include whitewater sports.

**The non-whitewater paddler user market will be determined based upon 4.3% of the population.**

### WHITewater PADDLERS

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Whitewater paddlers are individuals, families, and groups that have previous whitewater paddling experience, mostly kayaking and canoeing, and usually have equipment of their own. These users tend to be young adults, but can include participants of all ages. These paddlers will represent the smallest user segment. Whitewater paddlers will rarely participate in guided programs and most likely have their own equipment. Since this section of the Clinch River is not considered a strong whitewater experience,

most paddlers in this category would likely access the sites to enjoy a scenic river trip well within their skill level.

**The whitewater paddler user market will be determined based upon 0.9% of the population.**

### CAMPING

Camping has become increasingly popular in recent years with a noticeable increase in participation seen as an impact of COVID-19. The percentage of campers that own their equipment and/or RV has increased, as well as the distance individuals and families will travel to seek their camping experience.<sup>6</sup> Given the remoteness of Clinch River State Park, this latter fact bodes well for participation.

**The camping user market will be determined based upon 15.8% of the population.**

The total user market *is not* the projected usage of the park, but rather the smaller sub-set of the total population that is most likely to participate in the park’s programs, services, and experiences. Actual usage projections are based upon an estimated capture rate of users from within the user market. The tables below detail the total user market size based upon these user classifications and their corresponding participation trends.

User Market	Participation Rate	Primary Service Market	Secondary Service Market	Total User Market
General Users	53.0%	716,858	11,879,141	12,595,999
Non-whitewater Paddlers	4.3%	58,160	963,779	1,021,940
Whitewater Paddlers	0.9%	12,173	201,721	213,894
Camping	15.8%	213,705	3,541,329	3,755,034

Local Market Population	1,352,563
Secondary Market Population	22,413,473
<b>Total Market Population</b>	<b>23,766,036</b>

The data presented in this table indicates that the total user market for general users is 12,599,999 persons including the primary and secondary service areas. Included within this population are approximately 716-858 persons as general users that live within the primary service area, or within a two-hour drive. Similarly, the total user market of non-whitewater paddlers appears to be 1,021,940, of which 58,160 persons are within the primary service area. The total user market of whitewater paddlers is approximately 213,894 of which 12,173 are projected to reside in the primary service area. And finally, the total potential user market of campers is 3,755,034, with approximately 213,705 residing within the primary service area.

### ESTIMATING CAPTURE RATE

The capture rate of a market is the percentage of the user market that can reliably be captured to participate at least once annually in the services and experiences of Clinch River State Park. Research has shown that while there may be overall user market of 1,00,897 people within the primary service area, not all of these people will visit the sites each year. Actual capture rates are considerably lower than total market size for recreation and tourism because these are discretionary activities.

Estimating the potential capture rate of a user market is not an exact science, but is based upon previous performance of similar sites, general economic conditions, and the prevailing characteristics of the user

<sup>6</sup> Wisconsin Office of Outdoor Recreation. North American Camping Report: The 2021 Topline, Madison, Wisconsin, 2022.

market population. As a general rule, the capture of a user market declines with distance from the park. In other words, while the capture rate of a market within a two-hour drive of Clinch River State Park may be as high 5%, it will likely not be any higher than a fraction of 1% among residents beyond that distance. Capture rates will also differ based upon user classifications. For example, whitewater paddlers tend to demonstrate higher degrees of dedication to their activity than general users. Therefore, the capture rate of these users will be higher than that of general users. The table below details the estimated capture rates for each of the user classifications in each of the service areas. Again, these are based on industry experiences of other similar projects in the United States.

Given the remoteness of Clinch River State Park, market capture rates have been further reduced in this projection from that of sites located closer to population centers because of the lack of convenience for most people within a two and five-hour drive time to access the park. Camping and overnight stay accommodations and occupancy rates of similar state parks in the region have been taken into account when estimating the capture rates for Clinch River State Park. Additionally, data was obtained from the St. Paul Tourism Office indicating only 14,000 – 15,000 current annual visitors to the area.

Because Clinch River State Park is a new site in a fairly remote location, projections were developed with a range of potential visitation. This is based on a conservative approach to market capture rates, and a more aggressive approach. These differing capture rates are detailed in the tables below.

#### CONSERVATIVE CAPTURE RATE

User Market	Primary Service Market Capture Rate	Secondary Service Market Capture Rate
General Users	0.20%	0.09%
Non-whitewater Paddlers	5.00%	0.50%
Whitewater Paddlers	5.00%	0.50%
Camping	0.20%	0.08%

#### AGGRESSIVE CAPTURE RATE

User Market	Primary Service Market Capture Rate	Secondary Service Market Capture Rate
General Users	0.80%	0.10%
Non-whitewater Paddlers	7.00%	0.50%
Whitewater Paddlers	7.00%	0.50%
Camping	0.70%	0.10%

#### DEVELOPING VISITATION PROJECTIONS

The final step for determining reliable visitation projections is to apply the estimated capture rates for each classification of user to the service market in each service area. The tables that follow detail the specific data this process yields in both the conservative and aggressive capture rate scenarios. These usage projections are intentionally calculated as conservative estimates for visitation and participation at the river recreation sites and services once fully operating. They have followed the following process:

1. **Total Market Size x Participation Rate = Total User Market**
2. **Total User Market x Estimated Capture Rate = Total Market Capture, or Total Potential Market**
3. **Total Potential Market x Adjusted Estimated Capture Rate = Usage Projection**

### CONSERVATIVE VISITATION PROJECTIONS

User Market	Primary Service Market Capture Rate	Primary Service Market Capture	Secondary Service Market Capture Rate	Secondary Service Market Capture
General Users	0.20%	1,434	0.09%	10,691
Non-whitewater Paddlers	5.00%	2,908	0.50%	4,819
Whitewater Paddlers	5.00%	609	0.50%	1,009
Camping	0.20%	427	0.08%	2,833

User Market	Total Market Capture
General Users	12,125
Non-whitewater Paddlers	7,727
Whitewater Paddlers	1,617
Camping	3,260
<b>TOTAL</b>	<b>24,730</b>

### AGGRESSIVE VISITATION PROJECTIONS

User Market	Primary Service Market Capture Rate	Primary Service Market Capture	Secondary Service Market Capture Rate	Secondary Service Market Capture
General Users	0.80%	5,735	0.10%	11,879
Non-whitewater Paddlers	7.00%	4,071	0.70%	6,746
Whitewater Paddlers	7.00%	852	0.70%	1,412
Camping	0.70%	1,496	0.10%	3,541

User Market	Total Market Capture
General Users	17,614
Non-whitewater Paddlers	10,818
Whitewater Paddlers	2,264
Camping	5,037
<b>TOTAL</b>	<b>35,733</b>

*IMPORTANT NOTE: These visitation projections do not fully capture the potential local day-use of Clinch River State Park, as that demand is largely incalculable and unknown at this point in the planning process.*

As noted in these tables and this exercise, the total potential usage of Clinch River State Park sites and services by the recreational market is approximately 25,000 – 35,000 annual visitors. The total potential visitation is comprised of 12,000 – 18,000 general use visitors, 8,000 – 11,000 non-whitewater paddlers, 2,000 whitewater paddling enthusiasts, and 3,000 – 5,000 campers all of which would likely drive the operational and financial success of the sites.

### TOTAL POTENTIAL VISITATION PROJECTION

**The combined projections from the combined service markets equate to the likelihood that the total potential user-ship of Clinch River State Park sites and services could be 24,730 – 35,733 visitors each year.** While this represents the total potential usage, the pro forma developed within this report does not assume this level of usage in the initial years of operation. Rather, the pro forma was developed to identify the minimal annual usage required to support a financially “break-even or better” operational model.

From these findings, the following recommendations are reflected in the operational models developed for Clinch River State Park:

1. Design of amenities and services should have a broad appeal to people with skilled expertise in specific paddling sports, as well as low-barrier of entry activities for general users.
2. Operations should be limited and low-maintenance in order to be flexible and cost efficient.
3. The core business of Clinch River State Park sites and services will most likely be from general users, non-whitewater paddler, and campers that elect to stay overnight either camping or in improved accommodations that support their stay and desired experience.
4. Ancillary revenue streams are advisable to support operations costs. These include but are not limited to special events, festivals, and concession operations.



## DESIGN RECOMMENDATIONS

This *Market Analysis and Business Plan* includes design recommendations for the Artrip Bent and Sugar Hill units of Clinch River State Park that are based on a series of factors:

- Potential visitation projections
- Current regional tourism
- Visitation and overnight accommodations at nearby state parks in the region
- Visitation and overnight accommodations at similar state parks in the region

These design recommendations are predominantly focused on overnight stay capacity at the combines Clinch River State Park units. Parking and comfort station / restroom facilities should be determined based on the combined need of overnight accommodations and allowable day-use to also protect the impact on natural resources. Trail development should be based on site suitability and available space.

### OVERALL VISITATION

Based on typical visitation patterns of state parks in the area and of similar characteristics, the table below depicts how the estimated annual visitation at both the conservative and aggressive levels would likely materialize on a monthly basis.

	Percent of Annual Visitation	Annual Visitation 24,730	Annual Visitation 31,995
January	1%	247	320
February	3%	742	960
March	8%	1,978	2,560
April	10%	2,473	3,200
May	12%	2,968	3,839
June	14%	3,462	4,479
July	14%	3,462	4,479
August	12%	2,968	3,839
September	8%	1,978	2,560
October	10%	2,473	3,200
November	6%	1,484	1,920
December	2%	495	640
<b>TOTAL</b>	<b>100%</b>	<b>24,730</b>	<b>31,995</b>

### CAMPGROUND RECOMMENDATIONS

When developing design recommendations for campgrounds at Clinch River State Park, strong consideration was given to current (2021) visitation and usage data at campgrounds at state parks both located within a 60-minute drive time and those located within a four-hour drive time that matched the characteristics of the park. This analysis was focused on two state parks in particular – Warriors Path State Park (TN) located within a 60-minute drive time of the site, and Hiwassee River State Park (TN) that is within a four-hour drive time of Clinch River State Park and shares many characteristics of the project sites. Warriors Path State Park, while close in proximity, is a very different setting in that this is a park located directly within an urban area (Kingsport, TN) with a tremendous amount of day-use attributed to the amenities of the park that include a golf course. Hiwassee River State Park is more closely aligned with the type of park and user experiences that are more relevant for Clinch River State Park.

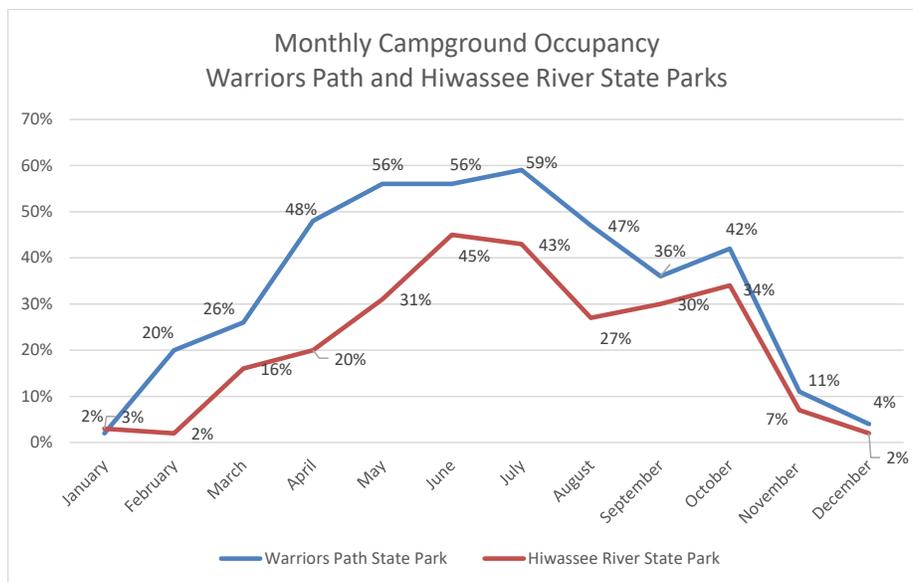
The usage projections utilized in this analysis for design recommendations are aligned with the overall visitation projections of Clinch River State Park and existing tourism data detailed within this report. The

chart below depicts comparisons of annual occupancy rates, subsequent annual campsite usage, and a varied set of campground capacity options for the combined development of the Artrip Bent and Sugar Hill units. Based on this analysis, it is recommended that the first phase of development at Clinch River State Park sites of campsites be a total of **50-60** in number. This should include an appropriate mix of walk-in sites, car-camping tent sites, and sites that can accommodate RVs.

Annual Usage	Warriors Path State Park		Hiwassee River State Park		Clinch River State Park					
	Monthly Campground Occupancy	Monthly Campground Use	Monthly Campground Occupancy	Monthly Campground Use	Monthly Campground Occupancy	Number of Campsites / Monthly Campground Use				
						40	50	60	70	90
January	2%	79	3%	42	1%	12	16	19	22	28
February	20%	161	2%	21	2%	22	31	37	43	56
March	26%	739	16%	227	16%	198	248	298	347	446
April	48%	1,352	20%	278	24%	288	372	446	521	670
May	56%	1,787	31%	454	31%	384	481	577	673	865
June	56%	2,220	45%	636	45%	540	698	837	977	1,256
July	59%	2,936	43%	630	45%	558	698	837	977	1,256
August	47%	1,899	27%	392	27%	335	419	502	586	753
September	36%	1,415	30%	426	30%	360	465	558	651	837
October	42%	1,713	34%	498	35%	434	543	651	760	977
November	11%	452	7%	96	7%	84	109	130	152	195
December	4%	153	2%	22	2%	25	31	37	43	56
<b>Annual Campsites Sold</b>		<b>14,906</b>		<b>3,722</b>		<b>3,281</b>	<b>4,158</b>	<b>4,989</b>	<b>5,821</b>	<b>7,484</b>
<b>Avg Annual Occupancy</b>	34%		22%			22%	23%	23%	23%	23%

This analysis assumes that the reasonable annual occupancy rate of the campgrounds at Clinch River State Park are approximately 23%, with capacity to accommodate monthly occupancy rates up to 45% or higher during peak seasons and potentially large event periods.

The following graphs depict occupancy and usage rates at Warriors Path and Hiwassee River State Parks in 2021.

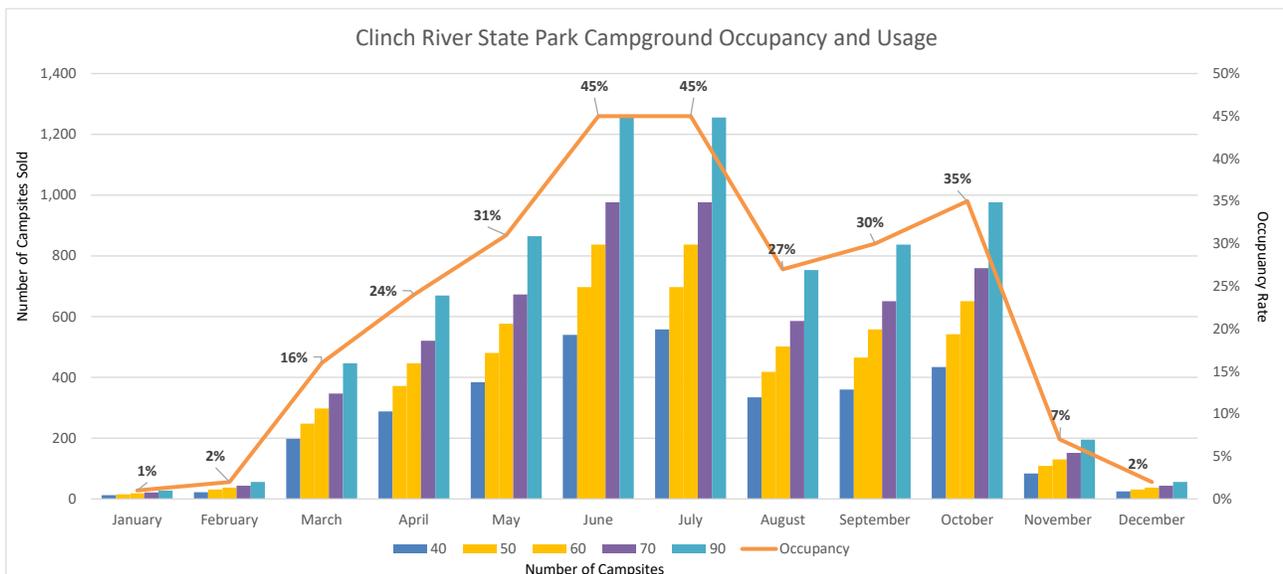


As additional support for the potential campground and cabin usage, monthly campground cabin attendance was also obtained for Hungry Mother State Park and Natural Tunnel State Park, both located in the same region of Virginia as Clinch River State Park. Hungry Mother State Park is located approximately 63 miles from the Sugar Hill Unit and Natural Tunnel State Park is approximately 53 miles away. These monthly attendance figures for both parks in 2020 and 2021 is provided in the tables below.

Hungry Mother State Park												
2020	January	February	March	April	May	June	July	August	September	October	November	December
Camp	53	53	1,393	0	3,190	9,654	10,477	9,387	5,328	6,380	2,662	409
Cabin	563	604	1,317	0	0	2,169	3,627	3,123	2,283	2,790	2,033	534
<b>Total</b>	<b>616</b>	<b>657</b>	<b>2,710</b>	<b>0</b>	<b>3,190</b>	<b>11,823</b>	<b>14,104</b>	<b>12,510</b>	<b>7,611</b>	<b>9,170</b>	<b>4,695</b>	<b>943</b>
2021	January	February	March	April	May	June	July	August	September	October	November	December
Camp	307	155	3,844	7,019	2,363	10,059	12,583	8,464	9,485	8,430	3,967	845
Cabin	397	379	2,476	2,708	664	3,388	5,055	3,715	3,559	3,453	3,049	1,081
<b>Total</b>	<b>704</b>	<b>534</b>	<b>6,320</b>	<b>9,727</b>	<b>3,027</b>	<b>13,447</b>	<b>17,638</b>	<b>12,179</b>	<b>13,044</b>	<b>11,883</b>	<b>7,016</b>	<b>1,926</b>
									<b>Total Overnight</b>		<b>Avg per Month</b>	
									2020		2020	
									60,829		5,669	
									2021		2021	
									97,445		8,120	

Natural Tunnel State Park												
2020	January	February	March	April	May	June	July	August	September	October	November	December
Camp	0	0	464	0	1,524	4,235	4,894	4,373	3,790	3,722	1,287	378
Cabin	413	290	276	0	0	549	910	1,466	1,076	2,503	1,164	534
<b>Total</b>	<b>413</b>	<b>290</b>	<b>740</b>	<b>0</b>	<b>1,524</b>	<b>4,784</b>	<b>5,804</b>	<b>5,839</b>	<b>4,866</b>	<b>6,225</b>	<b>2,451</b>	<b>912</b>
2021	January	February	March	April	May	June	July	August	September	October	November	December
Camp	0	0	1,155	2,501	2,765	3,138	3,280	3,254	3,845	3,379	1,135	59
Cabin	643	466	1,074	927	851	1,043	1,421	1,474	1,359	1,437	749	890
<b>Total</b>	<b>643</b>	<b>466</b>	<b>2,229</b>	<b>3,428</b>	<b>3,616</b>	<b>4,181</b>	<b>4,701</b>	<b>4,728</b>	<b>5,204</b>	<b>4,816</b>	<b>1,884</b>	<b>949</b>
									<b>Total Overnight</b>		<b>Avg per Month</b>	
									2020		2020	
									33,848		2,821	
									2021		2021	
									36,845		3,070	

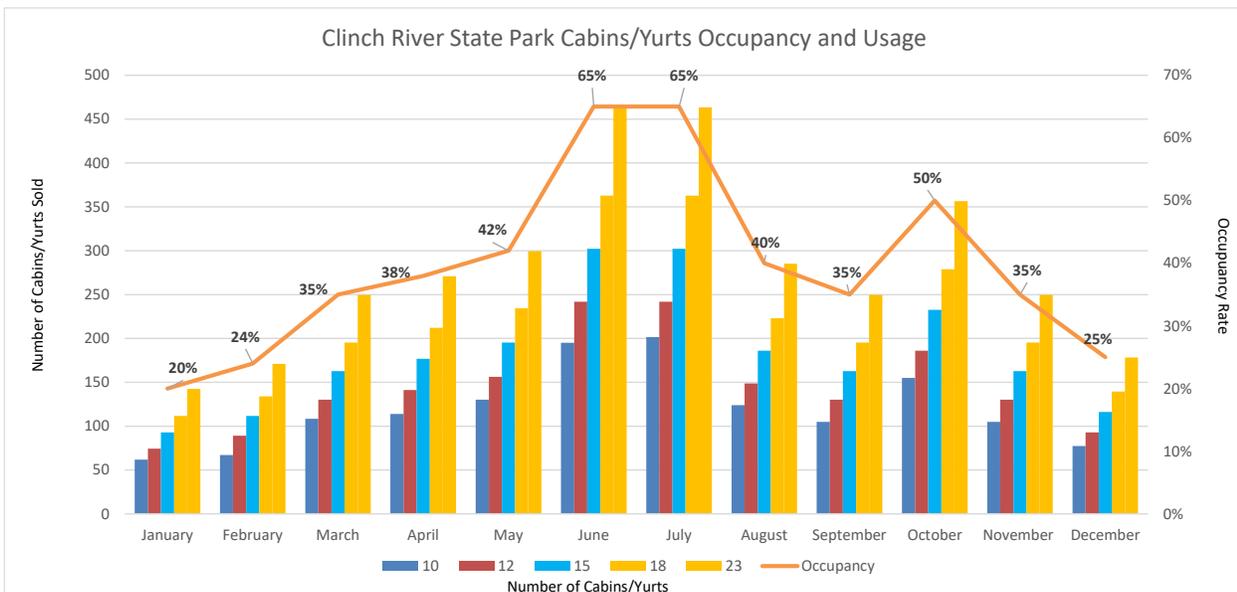
The subsequent recommended design capacity for campgrounds at Clinch River State Park at the varying levels of development are detailed in the graph below. Note the recommended 50-60 site scenarios are depicted in orange in the graph below.



CABINS / YURTS RECOMMENDATIONS

Similar to campground usage data taken from nearby and similar state parks particularly in Tennessee, design recommendations were developed for cabins and yurt facilities for Clinch River State Park. These recommendations are based on projected overall visitation, unique market characteristics, and the overall average annual occupancy rate of similar improved accommodations in Tennessee State Parks of 46%. This analysis suggests that the initial optimal amount of cabins and yurts would operate at just above 40% occupancy and should be developed at the combined units of Clinch River State Park to be **18-23 units**. This is detailed in the table and graph that follows with the recommended level of cabin/yurt development depicted in orange in the capacity comparison graph.

Clinch River State Park						
Number of Cabins-Yurts / Monthly Usage						
Annual Usage	Monthly Occupancy	10	12	15	18	23
January	20%	62	74	93	112	143
February	24%	67	89	112	134	171
March	35%	109	130	163	195	250
April	38%	114	141	177	212	271
May	42%	130	156	195	234	299
June	65%	195	242	302	363	463
July	65%	202	242	302	363	463
August	40%	124	149	186	223	285
September	35%	105	130	163	195	250
October	50%	155	186	233	279	357
November	35%	105	130	163	195	250
December	25%	78	93	116	140	178
<b>Annual User Nights Sold</b>		<b>1,455</b>	<b>1,775</b>	<b>2,219</b>	<b>2,663</b>	<b>3,403</b>
<b>Avg Annual Occupancy</b>	41%	40%	41%	41%	41%	41%



## BUSINESS PLAN

This Business Plan portion of this report contains three major elements for the purposes of informing operational and management planning of Clinch River State Park. These include:

1. Operational Standards
2. Program and Management Strategy
3. Pricing Strategy and Financial Pro Forma

## OPERATIONAL STANDARDS

The operational standards outlined within this plan are derived from state park management best practices within DCR and among peer state park agencies around the United States. The first aspect of these operational standards is the recommended operational model.

### RECOMMENDED OPERATIONAL MODEL

The recommended operational model of Clinch River State Park is a **managed access / staffed model**. This means the sites have controlled entry through either a manned or automated admission point and feature a basic staffing model to support user safety, site / amenity management, and the visitor experience. The Sugar Hill unit will have access from the Clinch River itself that will be more challenging to enforce but should be regularly monitored to ensure any visitors accessing the park from the river are adhering to park policies and facility usage regulations.

It is recommended that there be staffing located at both the Artrip Bent and Sugar Hill units to oversee the sites, manage operations and maintenance, and support visitor safety and experiences. These staff resources can be augmented by a volunteer program that includes work campers or park hosts to assist in providing basic park and campground maintenance and visitor engagement / support. It is also recommended to consider the engagement of qualified concessionaires to provide guided experiences on the Clinch River that can utilize the state park sites as staging locations, or as launch or take-out sites for river experiences.

### Guiding Principles:

1. The operations and management of Clinch River State Park should be managed with the following primary purposes:
  - a. Stewardship of the natural, historic and cultural resources of the sites
  - b. Safe visitor experiences for both day-uses, as well as multi-day and overnight experiences
  - c. Provide access to nature and outdoor recreation opportunities
  - d. Support and enhance quality of life for local communities and residents by providing protected open and green spaces, access to nature, and public recreation opportunities
  - e. Support and enhance local economic development through the attraction of visitors from outside the area
2. The core business of Clinch River State Park will be from parking and facility usage fees collected from visitors. Fee-based facility will include but not be limited to picnic shelters, campsites, cabins, yurts, and the future lodge at the Sugar Hill unit once developed.
3. Ancillary revenues can be generated from equipment rental, concessionaire fees from river operators, and limited retail / park store that can be support at the Sugar Hill unit.

## PROGRAMS AND SERVICES MANAGEMENT

Programs and services should be developed and managed within a classification system of **intended purpose** and **what benefits they provide**. Funding source expectations can then be assigned and this data used in future cost analyses. The results of this process is a summary of definitions and criteria, classification of programs and services within the park, and recommended cost recovery targets for each service based on these assumptions. The classification of services protocol identifies:

- the most important park operations and processes
- the support functions performed
- the value-added programs that enrich both the visitor’s experience and generate earned revenues in mission-aligned ways to help support operating costs

It is imperative to classify the services based on the users’ perspective. Who is benefiting from consuming the service? Although some services may seem “core” to a park, they may really be an important service. For example, camping is a service that benefits the people camping, not the general public. Although it generates money and is considered a high priority service, it does not mean it translates into a “core” service.

Specific details on recommended classification of programs and services are provided in subsequent sections of this plan.

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## PRICING OF SERVICES

All services should be evaluated yearly for their performance and relevancy to the operational and management objectives of the park. It times it may be advisable for services to be reduced, eliminated, or transferred. Classifying programs and services is an important process for a park to follow in order to remain aligned with the visitor’s interests and needs, the park’s mission, and to sustainably operate within the bounds of the financial resources that support it. It is a best practice is providing public programs that they be regularly evaluated on the criteria of type, who benefits from it, and who bears the cost of the program.

The approach taken in this analysis expands classifying services in the following ways:

- For whom the program is targeted
- For what purpose
- For what benefits
- For what cost
- For what outcome

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## PERFORMANCE MEASURES

Site standards have been developed and are recommended to support the core amenities and services of Clinch River State Park. The standards focus on establishing what constitutes a quality experience, pricing and cost, marketing and communication standards for users to access the amenity or service, and performance measures to track desired outcomes of the park and that hold staff accountable to those standards.

Clinch River State Park should consider developing the following performance measures to track desired outcomes and to demonstrate to key leadership the value of the investment being made in its programs, services, and amenities.

- During peak season, camp sites and overnight accommodations will have the following utilization targets (per month):
  - Campsites with electricity: 55%
  - Campsites without electricity: 55%
  - Cabins: 65%
  - Yurts: 65%
- During off-peak season, camp sites and overnight accommodations will have the following utilization targets (per month):
  - Campsites with electricity: 35%
  - Campsites without electricity (reduced availability): 35%
  - Cabins: 40%
  - Tipi: 40%
- All special events will generate at least 100% cost recovery for offering the service
- Reinvest 10% of all generated revenue into park operations and maintenance
- Repeat visitation will be tracked and the park goal is to have 50% repeat visitors annually (from previous year)
- Out of area visitation to Clinch River State Park will represent 70% of total visitation
- Capital improvements meet 95% of target revenues predicted
- Visitor satisfaction levels met at 90% or greater in all services
- Volunteer hours make up 15% of the total work force hours in the park

#### **STANDARDS OF HIGH QUALITY STATE PARK EXPERIENCE**

For all amenities and services, the following standards should be in place to promote a high-quality state park experience:

- All staff qualifications are consistent with in-the-field experience.
- Any guided or facilitated programs should have a staff/volunteer-to-participant ratios that is appropriate for participants to feel safe and attended to.
- Minimum and maximum numbers of participants are set for programs that will allow for a high-quality experience.
- The length of programs must commensurate with the attention capability of the participants to respond effectively in order to enjoy themselves in the activity.
- Appropriate support transportation is available to assist participants for river experiences (if necessary).
- Staff is trained in first-aid and CPR. Volunteers are trained as well when appropriate.
- Staff and volunteers are trained in customer service and diversity training to make all visitors feel welcome and appreciated.

- Customer feedback methods are in place to seek input from visitors on their expectations of park services and the results of their experience. This should include pre- and/or post-evaluations focus groups or trailer calls.
- Pricing of services is explained to participants and/or parents on the level of investment they are making in the service and the level that Clinch River State Park is investing in their experience.
- All park policies and usage regulations are available and accessible to visitors.
- New temporary and seasonal staff volunteers, and contract employees working with children will have certified background checks.
- Staff and volunteers that have regular visitor contact will be dressed in the appropriate uniform that includes a nametag.
- Performance measures tracked will be shared with staff and volunteers.
- Exit interviews will be conducted with temporary and seasonal staff before they leave each season and noted in their file as to re-hire or not.
- All regulatory requirements for programs and services are complied with.

#### **MAINTENANCE STANDARDS**

- Establish maintenance zones within Clinch River State Park that correlate with regular maintenance attention and activities performed. This should range from Level 1 areas that are highly utilized by visitors and require routine and daily maintenance, to Level 3 areas that require little to no regular maintenance beyond resource stewardship.
- Minimize Level 1 areas that require regular mowing during the growing season to optimize staff efficiency by utilizing native plantings.
- Maintain an active invasive management plan to continually improve the quality of the natural resources at Clinch River State Park.
- Utilize a maintenance management system to strategically prioritize and allocate staff resources to necessary maintenance tasks, as well as track capital asset lifecycle.
- Regularly inspect built infrastructure to identify maintenance priorities.
- Utilize volunteers where appropriate and possible to improve maintenance staff efficiency.
- Track the asset value of the park system and try to budget for 3%-5% of total asset value as an annual reinvestment in capital infrastructure.

#### **FINANCIAL STANDARDS**

- The fee schedule is in place, and staff understand the philosophy behind it and how to communicate price to users.
- Pricing of all services including concessions will be established commensurate with the prices of other available park amenities and consistent with system standards.
- The park will reserve the right to review concessionaire books as requested.

- Monthly results of programs and services will be posted and shared with staff on those services that are underperforming, meeting, or exceeding financial goals.
- Mini business plans will be developed for each core service on a yearly basis that evaluate the service based on meeting the outcomes desired for participants, cost recovery, percentage of the market and business controls, cost of service, pricing strategy for the next year given the fee schedule, and marketing strategies to be implemented. Cash collection standards and refund process standards should be incorporated. This will be the basis for budget development.
- Yearly competitor and other service providers will be benchmarked, shopped, and evaluated, for changes they are making and how they compare.
- Partnerships with service or program providers will be updated yearly, their level of contribution will be documented, and tracking performance measures will be shared with each partner or transferred to other service providers, thus reducing the impact on staff time.

## PROGRAM AND MANAGEMENT STRATEGY

### CLASSIFICATION OF SERVICES

As noted previously in this plan, the classification of services is an important framework for how programs and services can be developed, organized, managed, and refined. The service classification process consists of the following steps:

1. A definition for each program or service classification was developed that fits the legislative intent and expectations, the ability to meet public needs within the appropriate areas of service, and the mission and core values of Clinch River State Park (and the Virginia State Parks System).
2. Criteria were developed that evaluated each area and function within the program and service to determine the classification that best fit.

The classification matrix on the following page was developed as a guide for Clinch River State Park staff to follow when classifying programs and services and how that program or service needs to be managed with regard to cost recovery. Establishing clarification of what constitutes a “**Core Public Service**”, “**Important Public Service**”, and “**Value Added Service**” will provide the staff and its stakeholders a better understanding of why and how to manage each program or service area as it applies to public value and private value.



CRITERIA TO CONSIDER	CORE PUBLIC SERVICES	IMPORTANT PUBLIC SERVICES	VALUE ADDED SERVICES
Public interest or developmental importance as well as mandated by law and is mission aligned	High Public Expectation	High Public Expectation	High Individual and Interest Group Expectation
Financial sustainability	Free, Nominal or Fee Tailored to Public Needs — Requires Public Funding	Fees Cover Some Direct Costs — Requires a Balance of Public Funding and a Cost Recovery Target	Fees Cover Most Direct and Indirect Costs — Some Public Funding as Appropriate
Benefits – i.e. health, safety, and protection of a valuable asset.	Substantial Public Benefit (negative consequence if not provided)	Public and Individual Benefit	Primarily Individual Benefit
Competition in the market	Limited or No Alternative Providers	Alternative Providers Unable to Meet Demand or Need	Alternative Providers Readily Available
Access	Open Access by All	Open Access / Limited Access to Specific Users	Limited Access to Specific Users

The consultant team used the workload analysis task definitions to develop a service classification recommendation for Clinch River State Park. The recommendations are based upon national best practices. There is, of course, flexibility within the suggested classifications for the parks to adjust as necessary. It should be noted that the classifications are developed in relation to the user. See Appendix B for the recommended service classifications.

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## PROGRAMS AND SERVICES

### **FACILITY USAGE**

By far the most financially lucrative group of services provided at Clinch River State Park will be varied facility usage. This includes parking, picnic shelters, lodge rental, campsites, and improved accommodations.

### **DAY-USE FACILITIES**

The variety of day use facilities that will be revenue generating will also contribute to the overall usability of the state park. This including parking fees, rentable picnic shelters/pavilions, and rental of indoor multi-purpose space in the ledge for private and special events.

### **OVERNIGHT STAYS**

The primary core service of Clinch River State Park pertaining to that which has the highest potential for revenue generation to support overall operating costs is camping and overnight stays. While this may not account for the most visitors, it is certainly anticipated to be the highest revenue yielding function of the park. Having a blend of overnight stay options from varying levels of camping to improved accommodations like cabins and yurts is critical to not only diversify usage but also to increase the revenue generation capacity of the park.

### **SELF-GUIDED RECREATION**

A major core service of Clinch River State Park is the variety of self-guided recreation opportunities supported by the natural and built infrastructure of the park. This also will contribute to potential equipment rental opportunities that supports self-guided experiences with the possibility of adding guided river trips as an optional service provided by concessionaires. Self-guided experiences for users that bring their own equipment can enjoy the Clinch River State Park is anticipated to be the by far the most common type of park usage. All of these services can be organized to provide a variety of recreational options:

- Self-guided recreation – land based
  - Camping
  - Hiking
  - Mountain biking
  - Horseback riding
  - Geocaching
  - General recreation and sport
- Self-guided recreation – river based
  - Kayaking / canoeing
  - Rafting
  - Tubing
  - Stand-up paddleboarding

### **EQUIPMENT RENTAL AND SHUTTLE SERVICES**

Equipment rental for self-guided experiences has the potential of producing sizeable revenues during certain seasons of the year. It is recommended that the basic watercraft rental be restricted to single and tandem kayaks, inner tubes, and stand-up paddleboards. All watercraft rentals should come with paddles and personal flotation devices (PFDs) and must be accompanied with a signed rental agreement that detail usage rules, regulations and restrictions; personal safety responsibilities; indemnification; agreement to pay for rental gear and equipment; and personal assumptions of risk.

Finally, all rental agreements must be accompanied by a standard safety presentation or video that details the hazards of the waterway, courtesy and recreational ethics, usage rules and restrictions, and personal safety guidelines; or a facilitated orientation detailing the same information; or both. Recommended equipment rental and pricing is detailed in the table below. Paddles and PFDs should be included with all watercraft rentals.

Shuttle services could be offered during peak seasons to better enable users to rent equipment at the Sugar Hill unit, put-in at the river access point upstream near St. Paul, and float back to the state park. There could also be shuttle services considered for access points further upstream of the Sugar Hill unit at higher costs to the user. Shuttle services could be considered complimentary for visitors who rent equipment, and at a nominal fee for those that have provided their own equipment.

Usage Type	Cost to User	Length
Single kayak rental	\$25-35	3 hours
Tandem kayak rental	\$40-50	3 hours
Inner tube rental	\$15-20	3 hours
Stand-up paddleboard rental	\$30-40	3 hours

**GUIDED SERVICES AND PROGRAMS**

Guided services or facilitated programs at Clinch River State Park can include a variety of services and visitor experiences that are either provided directly by state park interpretive staff or by concessionaires. These are detailed below with some examples provided:

- Guided river experiences (concessionaire-operated)
- Guided horseback riding (concessionaire-operated)
- Resource interpretive programs – natural, historic and/or cultural (state park provided)
  - Guided hikes
  - Birding programs
  - Star parties
  - Flora and fauna identification programs
- Junior ranger programs (state park provided)
- Art in nature programs (concessionaire or state park provided)
  - Nature photography
  - Landscape painting
  - Sculpting
- Health and wellness programs (concessionaire-operated)
  - Yoga
  - Tai Chi
  - Trail running



## ANCILLARY PROGRAMS

The recommended ancillary programs of Clinch River State Park are those that can help to establish the market position of the sites as a high-quality recreational asset and destination, to diversify usage and enjoyment of these amenities by a broad segment of the community, to support regional tourism to the area, and to generate potentially significant earned revenues for the park.

## SPECIAL EVENTS AND FESTIVALS

There are a multitude of special events that could be held at Clinch River State Park, particularly the Sugar Hill unit, that can help to energize these assets in the region and encourage visitors to engage in more recreational use of the Clinch River. Special events can range from a variety of styles including, but not limited to festivals, fundraisers, skill exhibitions, and community social events. It is recommended that a minimum of two events be developed that are annual and on-going. Special events can include, but not be limited to music and crafts festival in the summer and fall and a series of competitive events (running, paddling, bicycling, etc.) in the spring and summer. Additional events can be planned and facilitated throughout the year to continue to refresh the Clinch River experience for both local residents and visitors.



**LEFT: Missouri Bluegrass Festival (North Dakota Parks and Recreation);  
RIGHT: Yampa River Festival (Friends of the Yampa – Steamboat Springs, Colorado)**

## MARKETING AND PROMOTIONS

One of the operational functions most often misunderstood and under-resourced in park operations is the essential element of marketing and promotion of the programs, services and potential visitor experiences. These operational pro forma have been developed with the assumption that sufficient marketing and promotional support will be provided in order to attract the estimated and potential user base identified. Appropriate marketing expenses have been included in the operational model, and these expenses have been built around industry best practices and proven techniques for effectively promoting river recreation experiences.

**RECOMMENDED TARGET MARKET GROUPS**

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Youth service organizations</li> <li>• Church groups</li> <li>• Private and public schools</li> <li>• Recreational clubs and organizations</li> <li>• Special user groups</li> </ul> | <ul style="list-style-type: none"> <li>• Organized adult groups</li> <li>• Community organizations</li> <li>• Civic clubs and associations</li> <li>• Enthusiasts and adventure recreationalists</li> <li>• Naturalists</li> </ul> | <ul style="list-style-type: none"> <li>• General public</li> <li>• Special recreation user groups</li> <li>• Families</li> <li>• Colleges and universities</li> <li>• Businesses</li> </ul> |
|---|--|---|

Marketing and promotional partnerships should be considered and developed with local businesses and community tourism organizations. This can include shared advertising opportunities, as well as potential experience packaging for visitors.

**PHASED DEVELOPMENT APPROACH**

The development of Clinch River State Park will occur in a phased approach that supports the ability to launch two separate but linked park units in a thoughtful and strategic manner. The current strategy is to develop the park in four primary phases:

- **Acquisition Phase** (current)
- **Development Phase 1** – initial park infrastructure and activation of day-use areas at Sugar Hill Unit, basic infrastructure at Artrip Bent Unit. And development at the Artrip Bent Unit will not begin until all acquisition work at this site is complete.
- **Development Phase 2** – initial overnight accommodations at Sugar Hill Unit, expanded day-use area development at Artrip Bent Unit.
- **Development Phase 3** – expansion of overnight accommodations and day-use areas at Sugar Hill Unit, overnight accommodations at Artrip Bent Unit.

A more detailed description of current planned developments in each phase are provided below.

**DEVELOPMENT PHASE 1**

**Sugar Hill Unit-** The following are suggested items for development for the Sugar Hill Unit for Phase 1:

- Develop and install entrance road off US Hwy 58 into the park continuing to park staff residence, shop facility, picnic grove, visitor center/gift shop, and slide boat launch area.
- Install utilities: electricity, water, sewer, and phone, fiber to contact station, shop facility, picnic grove area, and visitor center/gift shop.
- Build Contact Station
- Build a shop facility with support structures and restricted access secondary entrance.
- Build picnic grove with (2) picnic shelters, playground area, parking and restrooms
- Build Visitor Center with park offices, meeting space, gift shop and interpretive display area with parking support (ensure parking support does not affect view shed)
- Build a slide boat launch with a parking area, (5) paddle in camping sites and a pit toilet.
- Develop and install a trail from Visitor Center to the chimney area.
- Develop and install trail from Visitor Center to boat launch area

- Develop and install trail(s) on bluff tops on the SW portion of the park near the staff residence with parking support

**Artrip Bent Unit-** The following are suggested items for development for the Artrip Bent Unit for Phase 1:

- Entrance Road off of Artrip Bent Road that leads to a parking area near the current cemetery.
- Self-payment station along entrance road
- Build small maintenance yard area with service access road on the north side of the property
- Service access road/walking path from the cemetery parking lot that leads to Historic Blockhouse area, ridgetop views and trail connection to the future Owen's Preserve property

## DEVELOPMENT PHASE 2

**Sugar Hill Unit-** The following are suggested items for development for the Sugar Hill Unit for Phase 2:

- Install (20-25) standard camping site campground with a minimum of (2) bathhouses.
- Build camp store and orientation area with small attached shelter for programming with parking
- Install (4) yurt sites with decks and parking support
- Install (3) walk-in tent sites and vault toilet
- Install (10-12) site Water & Electric RV campground with bathhouse on the northeastern side of the property
- Build (1) picnic shelter to picnic grove for a total of (3) picnic shelters
- Install utilities: Power, water, sewer, phone, fiber for above listed phase 2 facilities
- Develop and install Mountain Bike network on the N side of the property (former Hill property)
- Build (1) additional staff residence near current staff residence

**Artrip Bent Unit-** The following are suggested items for development for the Artrip Bent Unit for Phase 2:

- Build Contact Station with office space/small gift sales area attached
- Build (2) picnic shelters with parking support and (2) comfort stations
- Install utilities: Power, water, sewer, phone, fiber for above listed phase 2 facilities
- Develop and install trail connection to historic sites and future Owen's preserve from the NW side of the property picnic area

## DEVELOPMENT PHASE 3

**Sugar Hill Unit-** The following are suggested items for development for the Sugar Hill Unit for Phase 3:

- Install second Water & Electric RV campground with (20-25 sites) with bathhouse.
- Develop and install trail connection to existing Sugar Hill Trail from campground
- Build (12-15) cabins consisting of a mix of 2-bedroom, 3-bedroom and at least one or two 6-bedroom lodges.
- Install group campsites and vault toilet
- Install utilities: Power, water, sewer, phone, fiber for above listed phase 3 facilities

**Artrip Bent Unit-** The following are suggested items for development for the Artrip Bent Unit for Phase 3:

- Install (12-14) standard campsites with parking support on the northwestern bluff overlooking the river
- Build (up to 4) Yurts with decks and parking support on northwestern bluff overlooking the river
- Build (2) bathhouses to support standard campsites and yurts
- Install (6-8) walk-in camping spots on the southeastern ridge top and vault toilet
- Build (1) staff residence, if a suitable option is not acquired in the acquisition phase
- Install utilities: Power, water, sewer, phone, fiber for above listed Phase 3 facilities

**STAFFING**

The staffing model projected to support the operations and management of Clinch River State Park including both the Artrip Bent and Sugar Hill units is detailed in the section that follows and is aligned with the planned phased development approach of the sites. This staffing strategy was developed in partnership with the local Virginia State Park staff and their projections for staffing needs. This does not include state park support staff that may be regional or state-wide in their focus. A full projected schedule of full-time equivalent staffing by phase is detailed in the table below.

*Clinch River State Park FTE Phased Staffing Matrix	FTE Park Manager	FTE Asst. Manager - Operations/ LE	FTE Office Manager	FTE Chief Ranger - Operations / LE	FTE Chief Ranger - Visitor Experience	FTE Park Ranger - LE	FTE Park Ranger Maintenance	FTE Housekeeping Manager	Total # per phase
Acquisition Phase (Current)	1			1					2
Phase 1 Development	1			1		1	1		4
Phase 2 Development	1		1	2	1	1	2		8
Phase 3 Development	1	1	1	2	1	1	2	1	10

\* Information on FTE matrix based on the 2018 DCR/VSP Staffing Matrix documents

Similarly, wage and seasonal staff will grow as the park moves through the development phases. The projected wage and seasonal employees needed to properly operate and maintain both units of Clinch River State Park are detailed in the table below.

**Clinch River State Park Wage Phased Staffing Matrix	Wage 1500 Admin & Office Specialist III	Wage Seasonal Admin & Office Specialist I	Wage Seasonal Contact Ranger	Wage 1500 Volunteer & Special Events Coord	Wage Seasonal Concession/Livery/Campstore Ranger	Wage 1500 Ed Support Specialist	Wage Seasonal Interpreter	Wage 1500 Trades Tech II	Wage Seasonal Trades Tech I	Wage 1500 Housekeeper	Total # per phase
Acquisition Phase (Current)	1					1		1			3
Phase 1 Development	1	1	2			1	1	2	2		10
Phase 2 Development	1	2	3		4	1	2	2	3	1	19
Phase 3 Development	2	2	6	1	4	1	3	3	6	4	32

**STAFFING COSTS**

Based on current pay rates of the agency, FTE and wage/seasonal staffing costs by position are detailed in the tables below. These tables reflect total cost at full build out of the park having completed all three development phases.

Clinch River State Park FTE	FTE Park Manager	FTE Asst. Manager - Operations/ LE	FTE Office Manager	FTE Chief Ranger - Operations / LE	FTE Chief Ranger - Visitor Experience	FTE Park Ranger - LE	FTE Park Ranger - Maintenance	FTE Housekeeping Manager
# of positions needed at full build out	1	1	1	2	1	1	2	1
FTE Avg. salary + benefits	\$ 99,552.00	\$ 77,969.00	\$ 77,969.00	\$ 61,445.00	\$ 61,445.00	\$ 61,445.00	\$ 61,445.00	\$ 61,445.00
Grand Total per position at full build out	\$99,552.00	\$77,969.00	\$77,969.00	\$122,890.00	\$61,445.00	61,445.00	\$122,890.00	\$61,445.00

10 FTE positions
\$685,605
Average; \$68,560 annual

Clinch River State Park Wage 1500/Seasonal	Wage 1500 Admin & Office Specialist III	Wage Seasonal Admin & Office Specialist I	Wage Seasonal Contact Ranger	Wage 1500 Volunteer & Special Events Coord	Wage 1500 Ed Support Specialist	Wage Seasonal Interpreter	Wage 1500 Trades Tech II	Wage Seasonal Concession/Livery Ranger	Wage Seasonal Trades Tech I	Wage 1500 Housekeeper
Positions Needed at Full Build Out	2	2	6	1	1	3	3	4	6	4
Wage 1500/Seasonal Hourly Rate	\$15.00	\$13.00	\$12.00	\$15.00	\$14.50	\$12.50	\$14.00	\$12.50	\$12.50	\$12.50
Annual Hours per Position	2,080	1,040	1,040	2,080	2,080	1,040	2,080	1,040	1,040	2,080
Total Cost per Position	\$31,200.00	\$13,520.00	\$12,480.00	\$31,200.00	\$30,160.00	\$13,000.00	\$29,120.00	\$13,000.00	\$13,000.00	\$26,000.00
Grand Total per Position Type at Full Build Out	\$62,400.00	\$27,040.00	\$74,880.00	\$31,200.00	\$30,160.00	\$39,000.00	\$87,360.00	\$52,000.00	\$78,000.00	\$104,000.00

32 Wage 1500/seasonal positions
\$412.00/hour
Avg. \$12.88/hour

## PRICING STRATEGY AND PRO FORMA

The pricing strategy and pro forma includes recommended fees for programs and services, as well as estimated operating costs to manage the multiple units of Clinch River State Park year-round.

### EARNED REVENUES

The greatest earned revenue potential of Clinch River State Park is centered on collected parking fees and fees for overnight stays, both camping and improved accommodations. There are additional revenue opportunities from other facility usage, equipment rental and limited retail. It is important to distinguish earned revenue streams as three different categories – core, support, and ancillary – in order to prioritize how operational expenses are allocated. A brief description of recommended revenue sources within each of these categories is provided below.

- **Core revenue streams**
  - Parking fees
  - Camping
  - Improved overnight accommodations
- **Support revenue streams**
  - Equipment rental
  - Picnic shelter rental
  - Indoor multi-purpose space rental
  - Retail sales (food, beverage, visitor supply, etc)
- **Ancillary revenue streams**
  - Program / service concessionaire fees
  - Fees from special events and festivals (vendors, food concessions, etc.)
  - Sponsorship or on-site advertising
  - Additional vending

The recommended pricing for each of these programs and services is based on the existing fee structure of DCR. These are detailed in the table below and on the following page. These represent Virginia resident fees only. Higher fees could be considered for non-Virginia residents if desired. Also, cabin and yurt fees can additionally increase during peak usage seasons.

Program / Service	Recommended Fee	Duration
Parking – Standard vehicle	\$7	Single day
Parking – High occupancy / bus	\$15	Single day
Camping – Standard (walk-in)	\$25	Nightly
Camping – Electric and Water	\$35	Nightly
Cabin (1-bedroom)	\$110	Nightly
Cabin (2-bedroom)	\$125	Nightly
Yurt	\$100	Nightly

Program / Service	Recommended Fee	Duration
Single kayak rental	\$35	3-hours
Tandem kayak rental	\$45	3-hours
Inner tube rental	\$15	3-hours
Stand-up paddleboard rental	\$35	3-hours
Picnic shelter / pavilion rental	\$50	Single day
Indoor multi-purpose space rental	\$500	5-hours
Guided river programs	Varies	2-3 hours
Guided land programs	Varies	2-3 hours
Interpretive/Junior Ranger programs	Free	≤1 hour
Skill-building programs	Varies	1-2 hours
Health and wellness programs	Varies	≤1 hour
Vendor / concession fees	10-13% gross receipts	Varies

#### USAGE ASSUMPTIONS FOR THE PRO FORMA

The following usage assumptions for the initial years of operation are derived from the projections and assumptions within this report and are detailed in the table below.

Visitation / Usage Type	Conservative Annual Projection	Aggressive Annual Projection
<b>Total Visitation</b>	25,000	32,000
<b>Parking</b>	9,500	12,500
<b>Camping</b>	4,150	5,000
<b>Cabins / Yurts</b>	2,600	3,400

## FINANCIAL PRO FORMA COMPONENTS

These financial pro forma assume the following:

- 245-day peak and shoulder operating season, with 148 prime operating days within that season
- 120-day low season
- Phased development of facilities as noted previously in this report

### EXPENSES

- Labor costs
  - Development Phase 1
    - Four FTEs
    - 10 Wage/Seasonal
  - Development Phase 2
    - Eight FTEs
    - 19 Wage/Seasonal
  - Development Phase 3
    - 10 FTEs
    - 32 Wage/Seasonal
- Materials and supplies include office and administrative materials, maintenance supplies, educational materials, and could include some promotional materials
- Equipment costs include annual repair and replacement of maintenance or recreational equipment
- Marketing and promotion expenses includes contracted / purchased marketing materials and advertising, as well as promotional printing
- Maintenance expenses
  - Facility maintenance (materials/supplies and contracted expenses)
  - Site maintenance (materials/supplies and contracted expenses)
  - Resource management (materials/supplies and contracted expenses)
- Miscellaneous expenses can include legal or professional fees, unbudgeted contracted services, etc.

### REVENUES

There were two different revenue scenarios developed in this study based on a conservative and a more aggressive visitation projection. The first scenario of a more conservative visitation projection for Year 1 revenues were calculated as shown in the table below.

Clinch River State Park - Conservative Visitation			
Revenue Stream	Average Fee	Year 1 Usage	Projected Revenues
Parking	\$7	9,500	\$66,500
Camping	\$30	4,150	\$124,500
Cabins / Yurts	\$110	2,600	\$286,000
Equipment rental	Varies	4,000	\$60,000
Picnic shelter rental	\$50	500	\$25,000
Additional Ancillary / Support Programs and Services	Varies	6,000	\$15,000
<b>TOTALS</b>			<b>\$577,000</b>

Miscellaneous / ancillary revenues are also based on very conservative estimates of potential instructional clinic fees, limited retail revenue, and revenues from special events.

The second revenue scenario are based on a conservative approach to visitation and usage, albeit still aligned with the market analysis results.

<b>Clinch River State Park - Aggressive Visitation</b>			
<b>Revenue Stream</b>	<b>Average Fee</b>	<b>Year 1 Usage</b>	<b>Projected Revenues</b>
Parking	\$7	12,500	\$87,500
Camping	\$30	5,000	\$150,000
Cabins / Yurts	\$110	3,400	\$374,000
Equipment rental	Varies	5,500	\$75,000
Picnic shelter rental	\$50	750	\$37,500
Additional Ancillary / Support Programs and Services	Varies	8,000	\$25,000
<b>TOTALS</b>			<b>\$749,000</b>

These two scenarios assume the same level of operational expense to deliver as the difference in the usage projection would not require additional resources to produce the increased service outcome. The first scenario is a more conservative usage estimate, and the second scenario demonstrates a service level required to generate sufficient revenues to fully cover operating expenses as projected.



## FINANCIAL PRO FORMAS

The table below details the projected operational pro forma for both conservative and aggressive visitation projections as detailed within this business plan. These are projected as annual financial performance expectations based on the two usage scenarios across all three phases of development. Given it is unknown when development phases will be complete, these are not projected as expected years of completion in the pro forma. It is known that Development Phase 2 will not be completed until years Development Phase 1, and similarly Development Phase 3 will not be completed until some number of years after Development Phase 2. As a result, conservative usage levels at each phase of development and subsequent revenue generation are slightly higher than the previous phase.

	Development Phase 1 Complete		Development Phase 2 Complete		Development Phase 3 Complete	
	Conservative	Aggressive	Conservative	Aggressive	Conservative	Aggressive
<b>Expenses</b>						
FTE Personnel	\$ 283,887	\$ 298,081	\$546,191	\$ 573,501	\$685,605	\$ 719,885
Wage/Seasonal Staff	\$ 163,800	\$ 171,990	\$ 327,080	\$ 343,434	\$ 353,737	\$ 371,424
Materials and Supplies	\$ 5,000	\$ 5,250	\$ 10,000	\$ 10,500	\$ 10,815	\$ 11,356
Equipment	\$ 5,000	\$ 5,250	\$ 10,000	\$ 10,500	\$ 14,000	\$ 14,700
Utilities	\$ 12,000	\$ 12,600	\$ 20,000	\$ 21,000	\$ 30,000	\$ 31,500
Marketing	\$ 1,000	\$ 1,050	\$ 10,000	\$ 10,500	\$ 13,000	\$ 13,650
Maintenance	\$ 15,000	\$ 15,750	\$ 20,000	\$ 21,000	\$ 25,000	\$ 26,250
Miscellaneous	\$ 7,500	\$ 7,875	\$ 10,000	\$ 10,500	\$ 10,605	\$ 11,135
<b>subtotal</b>	\$ 493,187	\$ 517,846	\$ 953,271	\$ 1,000,935	\$ 1,142,762	\$ 1,199,900
<b>Revenues</b>						
Parking	\$ 66,500	\$ 87,500	\$ 72,500	\$ 95,600	\$ 79,025	\$ 103,523
Camping	-	-	\$ 124,500	\$ 150,000	\$ 135,705	\$ 177,774
Cabins / Yurts	-	-	\$ 95,333	\$ 124,667	\$ 286,000	\$ 374,000
Equipment rental	\$ 30,000	\$ 37,500	\$ 48,000	\$ 60,000	\$ 60,000	\$ 75,000
Picnic shelter rental	\$ 12,500	\$ 18,750	\$ 25,000	\$ 37,500	\$ 27,250	\$ 40,875
Additional Ancillary / Support Programs and Services	\$ 5,000	\$ 8,333	\$ 10,000	\$ 16,667	\$ 15,000	\$ 25,000
<b>subtotal</b>	\$ 114,000	\$ 152,083	\$ 375,333	\$ 484,433	\$ 602,980	\$ 796,171
<b>Total</b>	\$ (379,187)	\$ (365,763)	\$ (577,938)	\$ (516,501)	\$ (539,782)	\$ (403,729)
<b>Cost Recovery Percent</b>	23%	29%	39%	48%	53%	66%
<b>Required Loss Coverage</b>	\$ 379,187	\$ 365,763	\$ 577,938	\$ 516,501	\$ 539,782	\$ 403,729

This operating pro forma indicates the potential to operate at 23%-29% cost recovery (recovery of operating expenses by earned revenues) with the completion of Development Phase 1. Similarly, this pro forma indicates Clinch River State Park has the potential to operate at 39%-48% cost recovery with the completion of Development Phase 2, and at 53%-66% with the completion of Development Phase 3. starting in Year 1, moving to 34% once the second development phase is complete. The relatively low cost recovery with only Development Phase 1 complete is due to the lack of significant revenue generating amenities such as campgrounds and yurts/cabins. There are likely to be multiple cost avoidance opportunities in these initial operating years in staffing and maintenance costs as operations ramp up and large maintenance issues are typically less prevalent in the first few years of operations. As cost avoidance opportunities are prudently available, cost recovery performance of operations can improve.

## CONCLUSION

This *Market Analysis and Business Plan* details out the projected service markets, identifies leading characteristics within those service markets that will most likely affect operations at Clinch River State Park, and build visitation and usage projections based on that data. Additionally, these projections were utilized along with performance metrics at nearby Virginia and Tennessee State Parks, as well as similar “river state parks”, to inform design recommendations for capacity of overnight accommodations. Finally, industry best practices and local circumstances drove the development of an operational model and business strategy that aligns with the expected development phases of the park culminating in a projected financial pro forma at each development phase.

The results of these analyses and business plan indicate that Clinch River State Park is not only going to provide tremendous quality of life and economic value to the local region, but also can be operated with sound business principles and defensible financial performance measures. This is a visionary project that will provide both tangible and intangible benefits to local residents and visitors to the area, and further promotion the local region as a viable eco and adventure tourism destination.



## APPENDIX A: CORE VS. CASUAL PARTICIPATION TRENDS

### OUTDOOR/ADVENTURE RECREATION

National Core vs Casual Participatory Trends - Outdoor / Adventure Recreation								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
<b>Hiking (Day)</b>	<b>37,232</b>	<b>100%</b>	<b>49,697</b>	<b>100%</b>	<b>57,808</b>	<b>100%</b>	<b>55.3%</b>	<b>16.3%</b>
<b>Bicycling (Road)</b>	<b>38,280</b>	<b>100%</b>	<b>39,388</b>	<b>100%</b>	<b>44,471</b>	<b>100%</b>	<b>16.2%</b>	<b>12.9%</b>
<i>Casual (1-25 times)</i>	18,845	49%	20,796	53%	23,720	53%	25.9%	14.1%
<i>Core(26+ times)</i>	19,435	51%	18,592	47%	20,751	47%	6.8%	11.6%
<b>Fishing (Freshwater)</b>	<b>37,682</b>	<b>100%</b>	<b>39,185</b>	<b>100%</b>	<b>42,556</b>	<b>100%</b>	<b>12.9%</b>	<b>8.6%</b>
<i>Casual (1-7 times)</i>	20,206	54%	20,857	53%	24,309	57%	20.3%	16.6%
<i>Core(8+ times)</i>	17,476	46%	18,328	47%	18,247	43%	4.4%	-0.4%
<b>Camping (&lt; 1/4 Mile of Vehicle/Home)</b>	<b>27,742</b>	<b>100%</b>	<b>28,183</b>	<b>100%</b>	<b>36,082</b>	<b>100%</b>	<b>30.1%</b>	<b>28.0%</b>
<b>Camping (Recreational Vehicle)</b>	<b>14,699</b>	<b>100%</b>	<b>15,426</b>	<b>100%</b>	<b>17,825</b>	<b>100%</b>	<b>21.3%</b>	<b>15.6%</b>
<i>Casual (1-7 times)</i>	7,843	53%	8,420	55%	11,281	63%	43.8%	34.0%
<i>Core(8+ times)</i>	6,856	47%	7,006	45%	6,544	37%	-4.6%	-6.6%
<b>Fishing (Saltwater)</b>	<b>11,975</b>	<b>100%</b>	<b>13,193</b>	<b>100%</b>	<b>14,527</b>	<b>100%</b>	<b>21.3%</b>	<b>10.1%</b>
<i>Casual (1-7 times)</i>	6,971	58%	7,947	60%	9,109	63%	30.7%	14.6%
<i>Core(8+ times)</i>	5,004	42%	5,246	40%	5,418	37%	8.3%	3.3%
<b>Birdwatching (&gt;1/4 mile of Vehicle/Home)</b>	<b>13,093</b>	<b>100%</b>	<b>12,817</b>	<b>100%</b>	<b>15,228</b>	<b>100%</b>	<b>16.3%</b>	<b>18.8%</b>
<b>Backpacking Overnight</b>	<b>10,100</b>	<b>100%</b>	<b>10,660</b>	<b>100%</b>	<b>10,746</b>	<b>100%</b>	<b>6.4%</b>	<b>0.8%</b>
<b>Bicycling (Mountain)</b>	<b>8,316</b>	<b>100%</b>	<b>8,622</b>	<b>100%</b>	<b>8,998</b>	<b>100%</b>	<b>8.2%</b>	<b>4.4%</b>
<i>Casual (1-12 times)</i>	3,862	46%	4,319	50%	4,803	53%	24.4%	11.2%
<i>Core(13+ times)</i>	4,454	54%	4,302	50%	4,194	47%	-5.8%	-2.5%
<b>Skateboarding</b>	<b>6,436</b>	<b>100%</b>	<b>6,610</b>	<b>100%</b>	<b>8,872</b>	<b>100%</b>	<b>37.8%</b>	<b>34.2%</b>
<i>Casual (1-25 times)</i>	3,867	60%	4,265	65%	6,315	71%	63.3%	48.1%
<i>Core(26+ times)</i>	2,569	40%	2,345	35%	2,557	29%	-0.5%	9.0%
<b>Fishing (Fly)</b>	<b>6,089</b>	<b>100%</b>	<b>7,014</b>	<b>100%</b>	<b>7,753</b>	<b>100%</b>	<b>27.3%</b>	<b>10.5%</b>
<i>Casual (1-7 times)</i>	3,843	63%	4,493	64%	5,020	65%	30.6%	11.7%
<i>Core(8+ times)</i>	2,246	37%	2,521	36%	2,733	35%	21.7%	8.4%
<b>Archery</b>	<b>8,378</b>	<b>100%</b>	<b>7,449</b>	<b>100%</b>	<b>7,249</b>	<b>100%</b>	<b>-13.5%</b>	<b>-2.7%</b>
<i>Casual (1-25 times)</i>	7,038	84%	6,309	85%	6,102	84%	-13.3%	-3.3%
<i>Core(26+ times)</i>	1,340	16%	1,140	15%	1,147	16%	-14.4%	0.6%
<b>Climbing (Indoor)</b>		n/a	<b>5,309</b>	<b>100%</b>	<b>5,535</b>	<b>100%</b>	n/a	4.3%
<b>Roller Skating (In-Line)</b>	<b>6,024</b>	<b>100%</b>	<b>4,816</b>	<b>100%</b>	<b>4,892</b>	<b>100%</b>	<b>-18.8%</b>	<b>1.6%</b>
<i>Casual (1-12 times)</i>	4,246	70%	3,474	72%	3,466	71%	-18.4%	-0.2%
<i>Core(13+ times)</i>	1,778	30%	1,342	28%	1,425	29%	-19.9%	6.2%
<b>Bicycling (BMX)</b>	<b>2,690</b>	<b>100%</b>	<b>3,648</b>	<b>100%</b>	<b>3,880</b>	<b>100%</b>	<b>44.2%</b>	<b>6.4%</b>
<i>Casual (1-12 times)</i>	1,457	54%	2,257	62%	2,532	65%	73.8%	12.2%
<i>Core(13+ times)</i>	1,233	46%	1,392	38%	1,348	35%	9.3%	-3.2%
<b>Climbing (Traditional/Ice/Mountaineering)</b>	<b>2,571</b>	<b>100%</b>	<b>2,400</b>	<b>100%</b>	<b>2,456</b>	<b>100%</b>	<b>-4.5%</b>	<b>2.3%</b>
<b>Climbing (Sport/Boulder)</b>		n/a	<b>2,183</b>	<b>100%</b>	<b>2,290</b>	<b>100%</b>	n/a	4.9%
<b>Adventure Racing</b>	<b>2,864</b>	<b>100%</b>	<b>2,143</b>	<b>100%</b>	<b>1,966</b>	<b>100%</b>	<b>-31.4%</b>	<b>-8.3%</b>
<i>Casual (1 times)</i>	1,121	39%	549	26%	328	17%	-70.7%	-40.3%
<i>Core(2+ times)</i>	1,743	61%	1,595	74%	1,638	83%	-6.0%	2.7%

NOTE: Participation figures are in 000's for the US population ages 6 and over

<b>Participation Growth/Decline</b>	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
<b>Core vs Casual Distribution</b>	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

WATER SPORTS/ACTIVITIES

National Core vs Casual Participatory Trends - Water Sports / Activities									
Activity	Participation Levels						% Change		
	2015		2019		2020		5-Year Trend	1-Year Trend	
	#	%	#	%	#	%			
Kayaking (Recreational)	9,499	100%	11,382	100%	13,002	100%	36.9%	14.2%	
Canoeing	10,236	100%	8,995	100%	9,595	100%	-6.3%	6.7%	
Snorkeling	8,874	100%	7,659	100%	7,729	100%	-12.9%	0.9%	
	<i>Casual (1-7 times)</i>	7,002	79%	6,192	81%	6,374	82%	-9.0%	2.9%
	<i>Core(8+ times)</i>	1,872	21%	1,468	19%	1,355	18%	-27.6%	-7.7%
Jet Skiing	6,263	100%	5,108	100%	4,900	100%	-21.8%	-4.1%	
	<i>Casual (1-7 times)</i>	4,425	71%	3,684	72%	3,783	77%	-14.5%	2.7%
	<i>Core(8+ times)</i>	1,838	29%	1,423	28%	1,116	23%	-39.3%	-21.6%
Surfing	2,701	100%	2,964	100%	3,800	100%	40.7%	28.2%	
	<i>Casual (1-7 times)</i>	1,665	62%	2,001	68%	2,507	66%	50.6%	25.3%
	<i>Core(8+ times)</i>	1,036	38%	962	32%	747	34%	-27.9%	-22.3%
Stand Up Paddling	3,020	100%	3,562	100%	3,675	100%	21.7%	3.2%	
Sailing	4,099	100%	3,618	100%	3,486	100%	-15.0%	-3.6%	
	<i>Casual (1-7 times)</i>	2,818	69%	2,477	68%	2,395	69%	-15.0%	-3.3%
	<i>Core(8+ times)</i>	1,281	31%	1,141	32%	1,091	31%	-14.8%	-4.4%
Rafting	3,883	100%	3,438	100%	3,474	100%	-10.5%	1.0%	
Water Skiing	3,948	100%	3,203	100%	3,050	100%	-22.7%	-4.8%	
	<i>Casual (1-7 times)</i>	2,835	72%	2,355	74%	2,189	72%	-22.8%	-7.0%
	<i>Core(8+ times)</i>	1,112	28%	847	26%	861	28%	-22.6%	1.7%
Wakeboarding	3,226	100%	2,729	100%	2,754	100%	-14.6%	0.9%	
	<i>Casual (1-7 times)</i>	2,308	72%	1,839	67%	2,007	73%	-13.0%	9.1%
	<i>Core(8+ times)</i>	918	28%	890	33%	747	27%	-18.6%	-16.1%
Kayaking (White Water)	2,518	100%	2,583	100%	2,605	100%	3.5%	0.9%	
Scuba Diving	3,274	100%	3,715	100%	2,588	100%	-21.0%	-30.3%	
	<i>Casual (1-7 times)</i>	2,405	73%	2,016	54%	1,880	73%	-21.8%	-6.7%
	<i>Core(8+ times)</i>	869	27%	699	46%	708	27%	-18.5%	1.3%
Kayaking (Sea/Touring)	3,079	100%	2,652	100%	2,508	100%	-18.5%	-5.4%	
Boardsailing/Windsurfing	1,766	100%	1,405	100%	1,268	100%	-28.2%	-9.8%	
	<i>Casual (1-7 times)</i>	1,461	83%	1,112	79%	1,015	80%	-30.5%	-8.7%
	<i>Core(8+ times)</i>	305	17%	292	21%	253	20%	-17.0%	-13.4%

NOTE: Participation figures are in 000's for the US population ages 6 and over

<b>Participation Growth/Decline</b>	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
<b>Core vs Casual Distribution</b>	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

## APPENDIX B: CLASSIFICATION OF SERVICES

<b>CLASSIFICATION OF SERVICES</b>			
For each Service place an 'X' to indicate if it is an Essential, important, or Value-Added service			
Service	Essential  Mostly PUBLIC good / Part of the Mission / Serves majority of the Community / Highest Level of Subsidy offered / "This service MUST be provided"	Important  Mix of PUBLIC and PRIVATE good / Important to the community / Serves the broad community / Some level of subsidy offered / "This service SHOULD USUALLY be provided"	Value-Added  Mostly PRIVATE good / Enhanced Community Offering / Serves niche groups / Limited to no subsidy / "This service is NICE to provide"
<b>Visitor Services</b>			
Ranger Station	X		
Camper Services		X	
Enterprise Sales		X	
General Visitor Services	X		
<b>Interpretation/Education</b>			
Recurring Public Programs or Tours		X	
Special Event Programming			X
Educational Programs for Schools		X	
Interpretive Media	X		
<b>Public Safety and Enforcement</b>			
Public Safety and Compliance Patrol	X		
Incident Reporting	X		
Coordination with Law Enforcement	X		
Assist Emergency Services	X		
Safety Planning and Training	X		
<b>Heritage Resource Management</b>			
Artifact Collections/Information Management	X		
Cultural Resources Protection and Management	X		
Heritage Resource Management, Stabilization, Preservation, and Compliance	X		
<b>Maintenance</b>			
Maintenance Planning and Management	X		
Major Maintenance/Capital Project Implementation	X		
Routine/Preventative Maintenance	X		
Equipment/Vehicle Repair	X		
Custodial Duties	X		
Site Inspections	X		
Recreation Impact management	X		
Landscape management	X		
Weed management	X		
Hazard Tree and Forest Management	X		
Public Water System Mgmt	X		
<b>Travel</b>	X		
<b>Park</b>			
Budget Management	X		
Contract/agreement management	X		
Marketing		X	
Grant Writing		X	
Issuing and Administering Permits	X		
Oversee Visitor Studies		X	
Enterprise	X		
<b>Planning</b>			
Planning	X		
Major Maintenance/ Capital Development Management	X		
Regulatory Processes/Environmental Assessments	X		
<b>Administration</b>			
Administrative Duties	X		
Purchasing	X		
<b>Staff Management</b>			
Employee Recruitment	X		
Employee Performance Management	X		
Supervision	X		
Policies and Procedures	X		
Employee Training	X		
Volunteer Management		X	
<b>Collaboration/Partnership</b>			
Collaborating with local officials		X	
Collaboration with partner groups		X	
Public Presentations and Meetings		X	
Collaboration with Adjacent Landowners	X		
Department/Division work	X		
Interdepartmental coordination	X		

