

## **CAMPGROUND INFORMATION FROM NPS**

**DATE:** October 3, 2019

**FROM:** National Park Service

**SUBJECT:** NPS Campgrounds

### **KEY FACTS**

- Campgrounds are an important resource for the National Park Service (NPS), providing a distinctive, low cost way for visitors to spend the night in a national park.
- At the end of Fiscal Year (FY) 2018, the National Park System included 1,421 campgrounds with 27,513 campsites.
- The deferred maintenance for campgrounds and related structures in national park sites is approximately \$331.6 million. Of this, approximately \$30.2 million resides in concession-assigned campgrounds and related structures. The total campground DM reflects 2.8% of the FY 2018 servicewide DM of \$11.9 billion.
- Of the NPS's 318 million visitors in 2018, camping visits accounted for an estimated 7.9 million nights, or 2% of total visits.
- The NPS seeks to engage with the public and other stakeholders to optimally manage toward visitor expectations and the vision for the second century of NPS campgrounds.

### **BACKGROUND**

Campgrounds allow visitors to transform a day in nature into an epic experience and provide a low-cost way for visitors to spend the night in parks across the country. More than 318 million visitors visit parks annually, with tent, RV, and backcountry campers spending an estimated 7.9 million nights at park system campgrounds in 2018.

The variety of available NPS campground facilities and amenities is extremely broad, from primitive, unstaffed back country campsites to a campgrounds that provide hot showers or can accommodate 25' Recreational Vehicles (RVs). Campgrounds are also managed through multiple models; some campgrounds are operated by the NPS, some by concessioners, and a few by other partners. The range and complexity of these models and amenities, in conjunction with limited financial resources, presents unique management challenges.

This briefing statement outlines the basic inventory, management models, planned investments and ongoing activities to support the next century of campgrounds in national parks.

## CAMPGROUND INVENTORY

The NPS manages a vast and diverse asset portfolio. As of FY 2018 year end, the NPS has a total of 1,421 campgrounds containing 27,513 campsites servicewide per the Facility Management Software System (FMSS) and NPS.gov. This includes:

- 502 **front country campgrounds** containing 16,648 campsites
- 425 **back country campgrounds** containing 2,154 campsites
- 494 campgrounds without front or back country designations
- 355 campgrounds containing 18,688 campsites **accessible by vehicle**
- 772 **group campsites**

Amenities at campgrounds in the National Park System include:

- 1,015 **comfort stations** at 346 campgrounds
- 12,730 **tent pads** at 485 campgrounds
- 8,585 **RV pads**
- 426 campgrounds with **water stations**
- 130 campgrounds with **year-round hot showers**
- 1,889 campsites at 36 campgrounds with **electrical hook ups**
- 130 campgrounds with **dumping stations**
- 33 campgrounds with **Wi-Fi**
- 60 **amphitheaters** at 55 campgrounds
- 3,534 **fire rings** at 556 campgrounds
- 14 **camp stores** at 11 parks

## MANAGEMENT MODELS

Of the Service's 1,421 campgrounds, 1,340 are managed by NPS and 81 are managed through concessions contracts.

**NPS-operated campgrounds.** The NPS operates a wide variety of campgrounds, including the 502 front country campgrounds accessible by vehicle and 425 back country campgrounds typically accessible by hiking. The range of amenities and utility hookups that are appropriate to each campground is based on the park's mission, campground location and size, availability of commercial campgrounds in the area, cost of installing and maintaining the amenities and utilities, and other considerations.

**Revenue.** Under the *Federal Lands Recreation Enhancement Act*, or FLREA, the NPS is authorized to collect fees when a "visitor uses a specific or specialized facility, equipment, or service" such as a campground. In FY 2018, the NPS Recreation Fee Program collected \$36.3 million in fees associated with overnight stays. These expanded amenity fees accounts for approximately 12% of the total recreation fee revenue collected. Expanded amenity fee rates are set by conducting comparability studies in the local area. The revenue is deposited as part of a park's overall FLREA revenue and spent in the same manner.

**Concessions-operated campgrounds.** Through the use of concession contracts or commercial use authorizations, the NPS provides commercial visitor services that are necessary and appropriate for public use and enjoyment. The park superintendent and concessions management team decide when it is necessary and appropriate to transfer operations to a concessioner based on park enabling legislation, planning documents, and substantial local market analysis.

**Revenue.** Concessioners' gross receipts top \$1 billion, including approximately 20% in lodging, 25% in merchandise and retail, and 20% in food and beverage revenue. Sixty of the 575 concessions contracts generate 85% of total gross receipts; 75% of contracts gross under \$500,000. NPS requires an average 5% franchise fee on all contracts.

## INVESTMENTS

Including the inventory associated with campgrounds, the NPS manages over 75,000 assets, including 18,000 miles of trails and thousands of culturally significant landscapes and monuments. Successfully maintaining NPS assets and infrastructure relies heavily on the carefully planned use of limited resources.

**NPS facility prioritization and investment.** The NPS utilizes its Capital Investment Strategy (CIS) to prioritize projects and direct funding towards our higher priority assets. This standard, servicewide priority-setting approach aligns investment decisions with a number of factors, including financial sustainability, resource protection, visitor use, and health and safety. Deploying both facility and financial data to support both day-to-day work management and long-term strategic decisions, NPS resources are primarily directed to deferred maintenance affecting the highest priority assets that support mission-critical infrastructure and visitor services.

**Deferred maintenance.** The deferred maintenance for campgrounds and related structures in national park sites is approximately \$331.6 million. Of this, approximately \$30.2 million resides in concession-assigned campgrounds and related structures. The total campground DM reflects 2.8% of the FY 2018 servicewide DM of \$11.9 billion.

**Planned funding.** Planned and ongoing investments include funds from Franchise Fees, the Line Item Construction and Maintenance Program, Recreation Fee Program (Rec Fee), Repair Rehab (Re/Re), and Cyclic Maintenance Program (Cyclic). As of May 2019, the Project Management Information System (PMIS) contains 559 formulated campground projects totaling \$114 million from FY 2019-2024 for the following fund sources:

<i>Fund Source</i>	<i>Number of Projects</i>	<i>Formulated Amounts (in Millions)*</i>
<b>Rec Fee</b>	460	\$99
<b>Re/Re</b>	34	\$12
<b>Cyclic</b>	65	\$4
<b>Total</b>	<b>559</b>	<b>\$114</b>

\* Table values may not sum to the total due to rounding.

Example projects include:

- \$34 million for **roads and parking lots** associated with campgrounds
- \$17 million for **water station projects** (includes water systems, water lines, water valves, etc.)
- \$16 million for **comfort stations** associated with campgrounds
- \$1 million for **electrical hook-up** projects
- \$1 million for **amphitheaters**
- 44 projects include **tent pads**
- 20 projects include **showers**
- 8 projects include **dump stations**
- 44 projects include **fire rings**

**Modernization.** Many NPS campgrounds have a rustic charm to them, but many are in need of some level of modernization or rehabilitation to either meet visitor expectations or safety requirements. The NPS does not intend to modernize every campground but strives to make smart, consistent decisions on when to modernize or rehabilitate a campground based on the park's unique circumstances, local market and financial factors, and applicable policies and regulations. In many cases, the investment of modernization and maintenance is cost prohibitive.

For example, in 2019 Sleeping Bear Dunes National Lakeshore will be renovating the comfort stations showers to make them Americans with Disabilities Act (ADA) compliant in Platte River Campground for \$99,000. The renovations will rehabilitate the failing tile and shower components and create an ADA compliant family friendly shower area

layout. In 2020, Chickasaw National Recreational Area will be replacing shower assemblies, including associated electrical and plumbing, at Point and Buckthorn campgrounds for \$54,000. Mount Rainier National Park replaced their wireless local area network (LAN) access point equipment in 2019 due to obsolete components that were no longer compliant with DOI and NPS security standards at a cost of \$40,000.

As such, the NPS works to target projects for modernization investments that concurrently improve the visitor experience at high use facilities, reduce deferred maintenance, and limit ongoing operational liability.

### **ALIGNING VISITATION, DEFERRED MAINTENANCE, AND INVESTMENTS**

To support thoughtful investment that aligns with the Department and servicewide goals of reducing deferred maintenance and improving the visitor experience, the NPS must balance competing needs and strategically target high value assets. Data-driven exercises considering campground occupancy and DM play a critical role.

**Overnight stays.** Occupancy of campgrounds varies widely, depending on location and proximity to metropolitan areas, access, amenities, and park natural and cultural resources, among other factors. The table below shows the top ten campgrounds with the highest FY 2018 occupancy that are reservable on Recreation.gov and the formulated projects associated with each location.

<b>#</b>	<b>Campgrounds</b>	<b>FY 2018 Campground Occupancy (# of individuals)</b>	<b>Formulated Amt (\$)</b>	<b>Majority DM Projects (# of projects)</b>
1	Mather Campground ( <i>GRCA</i> )	154,079	\$ 3,786,446	5 of 7 projects
2	Upper Pines ( <i>YOSE</i> )	128,113	\$ 6,209,069	0 of 2 projects
3	Watchman Campground ( <i>ZION</i> )	92,231	\$ 2,803,754	6 of 8 projects
4	Moraine Park Campground ( <i>ROMO</i> )	53,795	\$ 1,269,873	5 of 5 projects
5	Assateague Island National Seashore Campground ( <i>ASIS</i> )	51,035	\$ 1,198,356	6 of 6 projects
6	Fort Pickens Campground ( <i>GUIS</i> )	47,708	\$ 1,052,227	4 of 5 projects
7	Pinnacles Campground ( <i>PINN</i> )	44,382	\$ 332,266	2 of 4 projects
8	Blackwoods Campground ( <i>ACAD</i> )	44,289	\$ 859,719	1 of 2 projects
9	Point Reyes National Seashore Campground ( <i>PORE</i> )	43,918	\$ 746,470	7 of 8 projects

10	Hodgdon Meadow (YOSE)	43,440	\$ 553,217	1 of 1 project
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## VISION FOR THE SECOND CENTURY OF NPS CAMPGROUNDS

The NPS cannot feasibly modernize every campground nor do all resources dictate upgrades. Nonetheless, the NPS must be able to consistently and defensibly determine when the park's unique circumstances, local market and financial factors, visitor expectations, and applicable policies and regulations support such investment. In response, a collaborative team from the NPS Offices of Park Planning Facilities Lands, Commercial Services, and the Denver Service Center are being deployed to provide guidance for future NPS campground projects.

**Campground modernization and rehabilitation strategy.** The team is engaging hospitality services contractors, CBRE, Inc. and CHM Government Services, to investigate the market support, required analysis, and related business practices to support a campground modernization and rehabilitation strategy. The study will:

- Assist in understanding current and developing future expectations for camping
- Develop a report that details considerations and recommendations for the NPS to take into account during the development of a servicewide campground strategy
- Develop a repeatable framework that can be utilized at the park level to assess whether a campground modernization or rehabilitation project should occur
- Develop a generic model for the Service to use compare costs and revenues of campground operations under both a Service and concessioner-operated campground
- Conduct pilots to test the process and tools in the following six parks' campgrounds: Great Smoky National Park, Lake Mead National Recreation Area, Blue Ridge Parkway, Big Bend National Park, Rocky Mountain National Park, and Olympic National Park.

The scope of each pilot study CBRE, Inc. and CHM Government Services completes will include a campground industry analysis report, site visits, an analysis framework, and a financial analysis and model. These parks were chosen to be part of the study due to their variety of management model, seasonality, and amenities.

**Development of Standard Design Elements.** Concurrent with the completion of the servicewide campground strategy, the Denver Service Center will develop standard design elements for amenities identified in the strategy for NPS campground modernization. The process will consider best practices from other federal agencies, states, and the private sector to inform design charrettes and value based decision

making with key stakeholders and design team members. The final deliverable will consist of standards and guidelines, with sketches and illustrations where appropriate, to guide consistent campground modernization efforts across the service.

**Stakeholder engagement.** NPS must engage with the public and other stakeholders on our vision for the second century of campgrounds. This includes ongoing dialogue with the Outdoor Recreation Advisory Committee and its subcommittees.