

Appendix H
Private Non-Project Recreation Survey Results

Private Non-Project Recreation Survey Results

**Lewis River Hydroelectric Projects
FERC Nos. 2111, 2213, 2071, and 935**

Prepared by:
EDAW, Inc.

Prepared for:
PacifiCorp
Cowlitz PUD

December 2000

PRIVATE NON-PROJECT RECREATION SURVEY

The Recreation Surveys (REC 3) consist of a group of 7 user count, visitor attitude, and other surveys to supplement similar surveys conducted in 1996 through 1998 in the vicinity of the projects. Combined with previous survey data for the project area, these surveys provide information on demand and use levels in the study area. These 7 recreation surveys, once completed, will be compiled into the Recreation Demand Analysis report (REC 4). This survey, the Private Non-Project Recreation Survey, is 1 of these 7 surveys. It was conducted from October to December 1999. The results of this survey are presented below.

Study Objectives

The objectives of the Recreation Surveys (REC 3) are to answer key questions identified in the previous watershed scoping, assess existing demand and use levels, assess visitor attitudes and preferences, and assess perceptions of crowding.

Study Area

The Private Non-Project Recreation Survey study area includes businesses along the Lewis River Road corridor near the projects.

Methods

The methods for this study are described on pages REC 3-3 to REC 3-6 of the Study Plan Document (PacifiCorp and Cowlitz PUD 1999a).

Study Results

This survey investigates the role of private recreation providers and related suppliers in the Lewis River Valley from below Merwin Dam upstream to the Eagle Cliff area at Swift Reservoir. The intent of this survey is to help identify the role and niche these private providers and suppliers play in helping meet the needs of visitors in the study area. In evaluating their role, a series of in-person and telephone interviews were conducted with business managers. These interviews focused on identifying: (1) the role of private providers and suppliers in the valley; (2) the characteristics of visitors to the area who utilize these businesses; (3) perceived visitor needs; (4) the importance of the projects on area businesses; (5) recent impacts of new user fees on area businesses; and (6) information relating to the potential expansion of each business to accommodate future recreation needs in the Lewis River Valley.

Interviews were conducted with the following 7 businesses in the Lewis River Valley: Lewis River RV Park and Echo Store; Lewis River Golf Course; Ariel Store; Toy Rentals and Storage (boat/PWC rental and storage); Jack's Store (Monument climbers' register); Lone Fir Resort and Trailer Park; and the Cougar Store

The Volcano View RV Campground was initially included in this survey; however, this business is currently closed with no plans for re-opening in the foreseeable future. Eagles Cliff General Store and Campground could not be contacted.

Visitor Characteristics

Each business manager was asked a series of questions pertaining to their customers' place of residence and trip characteristics. When asked where most of their customers came from, a variety of answers were provided, depending primarily on the time of year. In general, all of the business managers surveyed estimated that about 70 percent of their customers were from the Woodland-Vancouver-Portland area during the summer months. Store owner/managers surveyed indicated that a slightly higher percentage of their customers were local residents of the Lewis River Valley. All of the managers indicated that the remaining percentage of their customers were either out-of-state or international visitors who were in the area to visit Mount St. Helens National Volcanic Monument. In the winter months, a different set of customers tended to frequent these businesses. Nearly all of the customers were from the Lewis River Valley in the wintertime, particularly store customers. These local customers included both general residents and recreationists (i.e., anglers and hunters). All of the businesses contacted were open year-round.

Visitors' Primary Destinations

Business managers were also asked to indicate the most common and primary destinations of their customers. Each business, with the exception of the golf course (where the course itself is the destination), indicated that the most commonly visited area attractions are either Mount St. Helens National Volcanic Monument, or 1 of the 3 project reservoirs. When asked to indicate the primary destination of their customers, 3 managers indicated the Monument (including all RV parks), 3 indicated the project reservoirs, and 1 indicated the golf course.

Customers' Reasons for Selecting a Business

When asked why customers chose to visit their business establishment, a variety of reasons were given that did not reveal a consistent theme. However, all 7 manager responses were directly related to either visiting the Monument or visiting the project reservoirs (excluding golfing). Responses included the following (multiple responses were possible):

- To obtain Mount St. Helens climbing permits (1)
- To purchase picnic or camping supplies (2)
- To purchase fishing supplies (1)
- To camp (2)
- To be close to the Monument (1)
- To seek peace and quiet (1)

- To rent/store boats (1)

Several of the business managers indicated that some customers choose their business because it was locally owned and operated and was close by. This was especially true of local residents and seasonal homeowners who frequent these businesses, particularly the stores.

Importance of the Project Reservoirs to Visitors' Decisions

Business managers were asked to estimate the importance of the Merwin, Yale, or Swift reservoirs in their customers' decision to patronize their business. Given a choice of 5 categories (extremely important, very important, somewhat important, not very important, and not at all important), a distinct pattern emerged in the responses. Three business managers (Ariel Store, Cougar Store, and Toy Rentals and Storage) indicated that the project reservoirs were extremely important to their customers. The same number of managers (Lone Fir Resort, Jack's Store, and Lewis River RV Park) indicated that the reservoirs were only somewhat important to their customers. One manager (Lewis River Golf Course) indicated that the reservoirs were not at all important to his customers. Managers that indicated that the project reservoirs were only somewhat important to their customers' decision tended to be businesses that were more dependent on Monument visitors and local residents for business, rather than the project reservoirs. These businesses included the RV parks/resorts, and to a lesser extent, the stores. Not surprisingly, business managers that indicated that the project reservoirs were extremely important to their customers' decision were the ones that were more dependent on the reservoirs for associated boating, picnicking, and camping-related purchases. These included the area stores and boating-related businesses. The Lone Fir Resort manager reported that this business does receive some project-related overflow use when the project campgrounds are full. However, on a normal day, Lone Fir Resort customers are typically Monument visitors. Jack's Store receives more of a mix of project reservoir users and Monument visitors compared to the other local businesses. This mix of users is due to the location of this store (near Cresap Bay Campground on Lake Merwin and Saddle Dam Park on Yale Lake), coupled with the Monument climbers' register located here.

Perceptions of Need

Business managers (7) who had previously visited recreation facilities at 1 of the 3 reservoirs were asked their impression of these facilities with respect to condition and quantity. Five of managers felt that the facilities were in good condition and that the number of existing facilities was appropriate. Two of the managers felt that the facilities were in good condition, but that more boat launches and day-use facilities were needed.

Impacts of New User Fees

A set of 3 questions dealt with the issue of new user fees that were implemented by Pacific Power in 1999, and the affect of these new fees on local businesses. The business managers were asked if the new day use fee would likely alter the way their customers

used facilities and services at the project reservoirs. Six managers indicated that the new fee would likely alter their customers' use of the area. Five of these 6 managers felt that their customers would use the area less, while 1 manager felt that there would be a short-term drop in visitation that would eventually rebound. Two of the managers (Jack's Store and Toy Rental and Storage) cited losses of 30 percent or more in sales during 1999 that guided their opinion that people would likely use the area less than in the past. Four of the managers felt that their customers would use the day use areas less than before because of the new fees, while 3 managers felt that they would use the day-use areas about the same as before.

In addition, business managers were asked if they felt that their customers would be willing to pay a small additional amount to support increased law enforcement patrols and/or emergency medical service. Two managers indicated that their customers would likely be willing to pay more, 3 indicated that they would not, while 2 did not know. Those managers that indicated little support for additional fees stated that their customers were primarily local residents who were already adequately covered for these types of services.

Future Expansion Potential

The final section of this survey dealt with business owner/managers' plans for potential future expansion. Four (50%) of the managers indicated that they had the physical capability to expand, while 4 indicated that they did not. Of the 4 managers who felt their businesses could expand, 2 of the businesses (Lewis River Golf Course and Toy Rental and Storage) already had plans for limited expansion of facilities and services (e.g., renovation of existing clubhouse facilities and the addition of more boat storage units). Two other managers did not feel the need to expand their businesses at any time in the foreseeable future.

Management Comments

At the conclusion of the interview, business managers were given the opportunity to share additional comments regarding the way recreation facilities and resources in the area were being managed in the area. Although few managers had comments, these comments included:

- If user fees are to be collected, an attendant should be on-site at all times to collect fees. Otherwise, it is not fair since those who are visiting a site when there are no staff present are not paying fees.
- Local residents do not like the new user fees because they feel that these areas are part of their traditional "backyard."
- Eventually, local residents will see the tangible benefits of the new user fees and be more supportive.
- An annual pass for local residents would be welcome.
- When local residents do not use these areas, it hurts local businesses, especially those who are more dependent on locals visiting these recreation facilities.