

HDRU LIBRARY

DO NOT REMOVE

**TOURISM-RELATED BUSINESSES ALONG THE UPPER
DELAWARE SCENIC AND RECREATIONAL RIVER**

D. J. Decker, C. P. Dawson and T. L. Brown

January 30, 1981

**Department of Natural Resources
New York State College of Agriculture and Life Sciences
Cornell University
Ithaca, New York**

PREFACE

This is the final report of a research and consulting project carried out by Daniel J. Decker, Chad P. Dawson, and Tommy L. Brown of the Department of Natural Resources, New York State College of Agriculture and Life Sciences, Cornell University, Ithaca, New York. The provision of consulting services for this study was supported by funding from the Mid-Atlantic Region of the National Park Service, U.S. Department of Interior, Philadelphia, Pennsylvania under purchase order number PX4000/0/0520. The project was conducted from May through December, 1980.

The work and cooperation of the planners from the five county planning agencies in the Upper Delaware River Valley who conducted the study interviews is gratefully acknowledged. The support and cooperation of the National Park Service planners from the Mid-Atlantic Regional Office and the Denver Service Center, and the Upper Delaware Area managers is appreciated.

SUMMARY

Interview forms were developed by the authors, in cooperation with National Park Service planners and county planners from the five-county Upper Delaware River area. Interviews were conducted by county planners at the 31 general recreation businesses with campground, boat livery, and hotel-motel facilities in or near the Upper Delaware River Valley. Information was collected on selected business characteristics, supply and demand data, and labor force characteristics.

Selected Characteristics of Recreation Service Firms

Hotels-motels in the Upper Delaware River Valley tend to be older, longer established on their present sites, compared to campgrounds and boat liveries. The mean age of hotel-motel businesses was 51 years, while those of campgrounds and boat liveries were 10 and 15 years, respectively. The tenure of management by current (1980) owners and operators at hotels-motels also is longer than those managing campgrounds and boat liveries (averaging 20, 8, and 9 years, respectively).

Hotel-motel sites tend to occupy less land than boat livery and campground sites. Hotel-motel sites averaged only 7 acres of developed land, while boat liveries and campgrounds averaged 18 and 37 acres of developed land, respectively. The majority of sites of each business type had enough area for expanding their facilities if needed.

Upper Delaware River frontage at each site varied considerably between businesses. Only two hotel-motel establishments had frontage, averaging 3000 feet. Three-fourths of the campgrounds had river frontage, averaging nearly one-half mile. Most boat livery sites had river frontage, averaging 1400 feet. Businesses of all three types which did not have river frontage routinely sent their customers, who were interested in river recreation, to commercial or public river access areas.

Of the three types of recreation service firms examined, only hotels-motels were generally open year-round. Campgrounds and boat liveries generally opened in April and closed in October.

Estimates of Supply and Demand

Hotels-Motels: The number of rental units available at the hotels-motels in the Upper Delaware River Valley was 353. The vast majority of these

were double rooms and were available at 88 percent of the establishments. Most of the hotel-motel businesses were small, typically 22 rooms. Six establishments had 10 or fewer rooms and the largest had 150 rooms. Average overnight rental fees for the various types of units ranged from \$16 to \$30 for one person and from \$21.50 to \$30.00 for two people. Prices charged by hotel-motel businesses varied considerably from one establishment to another for each type of unit; the price of renting a double room ranged from \$8 to \$37 for one person and from \$12 to \$75 for two people per night.

Overall, hotel-motel managers believed that about 20 percent of their patrons in 1980 were new customers. Most managers (69%) saw no change in percent of new customers in 1980 compared to 1979. Managers reported that about 83 percent of weekend customers and 75 percent of weekday customers made advance reservations. Managers estimated that about four out of five (79%) of the hotel-motel guests came from the metropolitan New York City area.

Occupancy data were requested for the period 1 May through 15 September 1980. From May through June average weekday hotel-motel occupancy increased from 6 to 38 percent. Typical weekend occupancy was 56 to 67 percent, except for Memorial Day weekend when occupancy was 88 percent. Weekday and weekend occupancy averaged about 65 and 83 percent, respectively, through July and August. Occupancy dropped off during the first two weeks of September; weekdays averaged 32 percent while weekends averaged about 56 percent.

Campgrounds: The number of campsites available at campgrounds in the Upper Delaware River Valley was 923. Tent, RV with electricity and water hookups, and undeveloped overflow sites were the most common types of campsites. Nine out of ten campgrounds had tent sites, the most abundant and widely available kind of campsite. Capacity per campground averaged 92 campsites, ranging in size from 4 to 300. Average overnight rental fees ranged from \$5 for an RV site with no hookups to \$10 for a lean-to shelter. Prices varied considerably from one campground to another especially for tent sites (\$2-\$15), lean-to shelters (\$3-\$15), and overflow area sites (\$5-\$20).

Overall, campground managers believed that 19 percent of their campers in 1980 were new customers. Most managers (67%) saw no change in percent of new customers in 1980 compared to 1979. Managers reported that about 74 percent of weekend campers and 60 percent of weekday campers reserved campsites in advance. Campground managers estimated that four out of five (84%) of their campers came from the metropolitan New York City area.

From May through June 1980 average weekday occupancy at campgrounds increased from 3 to 12 percent. Typical weekend occupancy ranged from

46 to 67 percent with Memorial Day weekend being the busiest at 70 percent occupancy. From July through Labor Day, weekday occupancy averaged 25 percent while weekend occupancy averaged 70 percent. Occupancy dropped off markedly during the first two weeks of September; 2 percent on weekdays and 34 percent on weekends.

Boat Liveries: The number of watercraft available at boat liveries along the Upper Delaware River totalled 3566 craft. Over 90 percent of these boats were canoes. Aluminum canoes were the most abundant (2548) and widely available (85 percent of liveries) type of craft. The average number of watercraft per boat livery was 244, but ranged from as few as 2 to over 1000. Average daily rental fees for the various kinds of craft ranged from \$12 per weekday to \$13.25 per weekend day for rowboats and from \$26.75 per weekday and \$31.50 per weekend day for rafts. Aluminum canoes rented for an average of \$14.64 per weekday and \$16.18 per weekend day. Prices varied considerably from one operation to another, ranging from \$10 to \$25 per weekday and from \$12 to \$25 per weekend day for aluminum canoes.

Overall, boat livery managers believed that 35 percent of their boaters in 1980 were new customers. Half (50%) of the boat liverymen believed that the percent of new customers in 1980 was similar to that in 1979. Seven out of ten boat livery operators renting canoes reported that the majority of their canoeists reserve canoes in advance and four out of five liverymen who rent kayaks reported that the majority of kayakers reserve kayaks in advance. Boat livery operators estimated that about 61 percent of their customers came from the metropolitan New York City area. The proportions coming from the five local PA-NY counties bordering the Upper Delaware River (12%), other New York State areas (11%) and other Pennsylvania areas (13%) were similar.

During 1 May to 15 September 1980, average weekday watercraft rentals varied from only 5 to 11 percent of the available watercraft. Weekend boat rentals in the first half of May averaged 42 percent of the fleet. During 16 May through 30 June about 67 to 75 percent of the available watercraft were rented on weekend days. Weekend use of rental boats

diminished to 52 percent in both July and August, then to 44 percent on Labor Day weekend and 20 percent during the first half of September.

Advertising Outlets: The vast majority of all three types of businesses advertised in county-state tourism guides. Most campground managers and boat livery operators also advertised via mail brochures and magazine ads, whereas a majority of hotel-motel businesses used newspaper ads.

Selected Attitudinal Information

Most managers or owners of the 31 recreational service firms included in the Upper Delaware River Valley study would like to encourage more tourism. About seven out of ten managers or owners would like more tourism in April through August, while eight out of ten would like to see more tourism in September and October.

Law enforcement to regulate recreationist behavior, especially regarding littering and trespassing, is a major concern among recreation business managers. A majority of recreation business managers (54%) observed an increase in law enforcement effort in the corridor in 1980.

The majority of managers (68%) surveyed had concerns about management of the Upper Delaware River Valley, but most (74%) had positive comments regarding current management and plans for future management. Three general concerns were expressed by 20 percent or more of those people with concerns: river management programs should (1) encourage more tourists, (2) enhance additional recreational development, and (3) provide more river access -- all activities that would directly or indirectly enhance recreation service operations in the area.

Boat livery operators were asked three questions related specifically to boaters. Regarding trends in littering along the river by boaters, boat livery operators were evenly divided between reporting that littering in 1980 was less or the same as in 1979. With respect to the amount of boater use, about nine out of ten boat livery operators felt that crowding of boats on the river was not a problem. Nearly two-thirds of the managers would like to see canoeists and other boaters receive more information on boating safety.

Labor Force Characteristics

The 31 recreation businesses along the Upper Delaware River Valley employed a mean of 11.3 workers in 1980. The large combination hotel-motel/campground/liveries employed an average of 39 workers, whereas businesses that consisted of only boat liveries employed a mean of 14.4 workers, hotels/motels averaged 7.6 employees, and campgrounds averaged 4.5 workers. Although the employment in many of the businesses, especially campgrounds and liveries, is seasonal, the vast majority of all employment (83%) is full time. All types of businesses employ part-time seasonal help, but this is most prevalent in campgrounds.

In addition to providing employment for 115 owners or managers and members of their families, these businesses hired an additional 237 people in 1980, 215 (91%) of which were local residents.

Owners, coowners, and their families comprised 36 percent of total full-time employment and 48 percent of total part-time employment of Upper Delaware River Valley businesses. Local employees who were not from the owner's family, constituted 57 percent of the full-time workweeks, and 52 percent of the part-time workweeks. Nonlocal employees worked about 7 percent of all full-time work weeks; there was no part-time employment of nonresidents.

Economic Impact of Recreation Businesses

The most direct impact of these 31 recreation businesses on the economy of the Upper Delaware River Valley which can be estimated from our data is their employment of 352 people, 330 of whom are local residents. The combined employment of these businesses corresponds to an estimated 10,426 weeks of full-time employment, or the equivalent of approximately 200 full-time year-round jobs in the Upper Delaware River Valley. Using Census data, we estimate that approximately 3.5 percent of the entire labor force of the 15 townships in the Upper Delaware River area is employed by these businesses. Payroll data were not obtained in the study, but if these businesses are typical of those reported in the Census of Service Industries in 1977 they would have a combined total payroll of approximately \$1.5 million, in 1980 current dollars.

The information on business characteristics, supply and demand, and labor force characteristics reported herein for boat liveries, hotels-motels, and campgrounds have various implications for recreation planning by the public and private sectors. The integration of these data with the results from other Upper Delaware River Valley studies involving resident and nonresident recreationists, riparian landowners, and boaters on the Upper Delaware River will help provide a comprehensive overview of the needs, concerns and preferences of the various recreation-related interest groups along the Upper Delaware River Valley.

TABLE OF CONTENTS

| | <u>Page</u> |
|------------------------------------------------------------------------------------------------------------------------|-------------|
| PREFACE. | i |
| SUMMARY. | ii |
| TABLE OF CONTENTS. | viii |
| LIST OF TABLES | x |
| LIST OF FIGURES. | xi |
| INTRODUCTION | 1 |
| METHODS. | 2 |
| FINDINGS | 5 |
| Characteristics of Recreational Service Firms in the Upper Delaware River Valley | 5 |
| Business Tenure. | 5 |
| Size (Acreage) and Expansion Potential of Sites. | 8 |
| Types of Services and Facilities Offered by Recreational Service Firm Sites in the Upper Delaware River Valley. . . | 8 |
| Hotel-Motel Sites | 8 |
| Campground Sites. | 11 |
| Boat Livery Sites | 11 |
| River Frontage of Recreational Firms and Customer Access . | 11 |
| Opening and Closing Dates for Recreation Service Firm Sites in the Upper Delaware River Valley | 16 |
| Hotel-Motel Sites | 16 |
| Campground Sites. | 16 |
| Boat Livery Sites | 16 |
| Estimates of Supply and Demand. | 20 |
| Hotel-Motel Businesses | 20 |
| Number of Available Rental Units and Fees | 20 |
| Length of Stay in 1979 and 1980 | 20 |
| Percentage of New Customers in 1979 and 1980. | 23 |
| Advance Reservations. | 23 |
| Residence Areas of Hotel-Motel Customers. | 23 |
| Occupancy in 1980 Compared to 1979. | 23 |
| Campground Businesses. | 26 |
| Number of Available Campsites | 26 |
| Length of Stay in 1979 and 1980 | 29 |
| Percentage of New Campers in 1979 and 1980. | 29 |
| Advance Reservations. | 33 |
| Residence Areas of Campers. | 33 |
| Occupancy in 1980 Compared to 1979. | 33 |

| | <u>Page</u> |
|-------------------------------------------------------------------------------------------------------------|-------------|
| Boat Livery Businesses | 37 |
| Number of Available Watercraft. | 37 |
| Duration of Canoe Rentals in 1979 and 1980. | 37 |
| Percentage of New Boaters in 1979 and 1980. | 40 |
| Advance Reservations. | 40 |
| Residence Areas of Boaters. | 40 |
| Watercraft Rental in 1980 Compared to 1979. | 40 |
| Services and Facilities Available to Non-Overnight Customers at Campgrounds and Hotels-Motels | 44 |
| Advertising Outlets Utilized by Recreation Businesses. | 47 |
| Attitudes of Business Owners/Managers Regarding Management of the Upper Delaware River Valley. | 49 |
| Trend in Tourism Desired by Recreation Service Firm Managers in the Upper Delaware River Valley. | 49 |
| Other Management Concerns. | 49 |
| Labor Force Characteristics | 52 |
| Economic Impact of Recreation Businesses. | 55 |
| DISCUSSION AND IMPLICATIONS. | 56 |
| LITERATURE CITED | 59 |
| APPENDIX A | 60 |
| APPENDIX B | 66 |
| APPENDIX C | 72 |
| APPENDIX D | 79 |
| APPENDIX E | 83 |
| APPENDIX F | 87 |
| APPENDIX G | 91 |

LIST OF TABLES

| <u>Table</u> | | <u>Page</u> |
|--------------|----------------------------------------------------------------------------------------------------------------|-------------|
| 1 | Percent of Hotels-Motels (N = 16) Offering Selected Services and Facilities to Customers. | 12 |
| 2 | Percent of Campgrounds (N = 11) Offering Selected Facilities, Services, and Rentals to Overnight Campers. . | 13 |
| 3 | Percent of Boat Liveries (N = 24) Offering Selected Services and Facilities to Boaters. | 14 |
| 4 | Customer River Access and River-related Activities Permitted at Recreational Business Sites. | 17 |
| 5 | Opening and Closing Dates for Recreation Service Firm Sites. | 18 |
| 6 | Number of Rental Units, by Type of Unit at Hotels-Motels. | 21 |
| 7 | Estimated Length of Stay (Overnights) of Hotel-Motel Patrons in 1979 | 24 |
| 8 | Estimated Percent Annual Gross Receipts of Hotel-Motel Businesses, by Quarter. | 28 |
| 9 | Number of Campsites by Type of Campsite | 30 |
| 10 | Estimated Length of Stay (Overnights) of Campers in 1979. | 32 |
| 11 | Estimated Percent Annual Gross Receipts of Campground Businesses, by Quarter. | 36 |
| 12 | Number of Watercraft, by Type of Watercraft | 38 |
| 13 | Estimated Duration of Canoe Rentals in 1979 | 41 |
| 14 | Estimated Percent Annual Gross Receipts of Boat Livery Businesses, by Quarter. | 45 |
| 15 | Facilities and Services Available to Non-overnight Customers at Recreational Businesses. | 46 |
| 16 | Advertising Outlets Utilized by Recreation Service Businesses. | 48 |
| 17 | Trend in Tourism Desired by Recreation Service Businesses. | 50 |
| 18 | Employment of Recreation Service Firms in the Upper Delaware River Valley | 53 |
| 19 | Employment of Upper Delaware River Valley Recreation Businesses, by Family and Non-Family Employment | 54 |

LIST OF FIGURES

| <u>Figure</u> | | <u>Page</u> |
|---------------|---------------------------------------------------------------------------------------------------|-------------|
| 1 | Mean years businesses of each type have been in existence at their present sites. | 6 |
| 2 | Mean years businesses of each type have been under current management. | 7 |
| 3 | Mean acres of land developed at sites of each type. | 9 |
| 4 | For sites with undeveloped acreage, mean acres of land undeveloped at sites of each type. | 10 |
| 5 | For sites with river frontage, mean feet of river frontage at sites of each type. | 15 |
| 6 | Average opening and closing dates of sites of each type. | 19 |
| 7 | Mean rental fees per night, by type of unit, at hotels-motels | 22 |
| 8 | Overall percentage of hotel-motel customers who came from various residence areas. | 25 |
| 9 | Average weekday and weekend hotel-motel occupancy between 1 May and 15 September 1980 | 27 |
| 10 | Mean rental fees per night, by type of campsite | 31 |
| 11 | Overall percentage of campers who came from various residence areas | 34 |
| 12 | Average weekday and weekend campground occupancy between 1 May and 15 September 1980 | 35 |
| 13 | Mean daily rental fees, by type of watercraft | 39 |
| 14 | Overall percentage of boaters who came from various residence areas | 42 |
| 15 | Average weekday and weekend boat rentals between 1 May and 15 September 1980 | 43 |

INTRODUCTION

A 75-mile segment of the Upper Delaware River from Hancock to Sparrowbush, New York was designated by the National Parks and Recreation Act of 1978 for inclusion in the National Wild and Scenic Rivers System. The Upper Delaware is to be protected and managed as a scenic and recreational river primarily through local land use controls in the river corridor and regulations to manage the river recreationists. A management plan for the Upper Delaware River will be developed through the combined efforts of the National Park Service planners and managers; New York and Pennsylvania state, county, and local planners and officials; the Delaware River Basin Commission; and the Upper Delaware Citizens' Advisory Council.

In April 1980 the National Park Service planning and management staff and the five county planning agencies working on the Upper Delaware River requested a proposal be developed to outline a research project to collect information on the tourism-related businesses operating along the Upper Delaware River Valley.

We were requested to design and provide survey instruments which would allow the planners from the five county planning agencies in the Upper Delaware River Valley to inventory the characteristics of campgrounds, boat liveries, and hotels/motels in the valley area. This data was then to be analyzed by the Cornell consultants to determine the supply and demand, and economic importance of the tourism-related businesses along the Upper Delaware River Valley.

This project was funded by the National Park Service for the period 15 May through 31 December 1980. The objectives were defined as follows: (1) estimate the supply of and demand for campgrounds, boat-canoe liveries, and motels and hotels in the Upper Delaware River valley; and (2) estimate the effect of these tourism-related businesses on the valley economy.

Only campgrounds, boat-canoe liveries, and motels and hotels were included in this study since they are the service firms most directly related to tourism in the Upper Delaware River Valley. The decision not to include other service firms such as grocery stores, restaurants, and gas stations was made with the knowledge that it is difficult to determine

what portions of these businesses can be attributed to tourists and that some estimates of expenditures by nonresident tourists at these businesses would be included in a separate study.

METHODS

An interview form was developed with the cooperation of the National Park Service planning team and the county planners in the five-county Upper Delaware River area. The form was designed to collect: (1) business characteristics such as years under current management, and annual opening and closing dates; (2) estimates of supply such as the number of campsites, motel rooms, and canoes for rent; (3) estimates of demand such as the number of campsites, motel rooms, and canoes rented per month; (4) labor force characteristics such as the number of part-time and full-time employees; and (5) estimates of the impact of these tourism-related businesses on the Upper Delaware River Valley economy such as the amount of employment created by these businesses.

The decision not to include a detailed economic analysis of the tourism-related businesses was based on three factors: (1) the complexity and cost involved in conducting an economic analysis that takes into account all revenue, labor costs, overhead, investments, etc.; (2) the confidential nature of this information and difficulty of obtaining cooperation from the businesses; and (3) inadequate documentation of the need for this type of detailed information in the planning process. Thus, it was decided to proceed with this more descriptive analysis of the three types of tourism-related businesses.

The list of businesses to be included in this survey was compiled by the five county planning agencies in June 1980 as they conducted an inventory of the existing recreation related businesses in the Upper Delaware River Valley. For the purposes of this study the Upper Delaware River Valley was considered to be a 75-mile long and 2-mile wide corridor. Any campground, boat-canoelivery, and motel or hotel that was within this area or in close proximity (several miles) was included in the census. This resulted in a list of: (1) 10 campground type businesses operating at 11 sites; (2) 13 boat-canoelivery type businesses operating at 24

sites; and (3) 16 hotel and motel type businesses at 16 sites. These business types were represented by 31 general businesses which could include more than one of the business types (e.g., a general business could include both a campground and a boat-canoe livery).

All 39 of these tourism-related businesses (i.e., business types) were included in the survey. The operator or manager at each was interviewed by one of the county planners using the campground, boat livery, and hotel and motel survey forms included in Appendices A to C. Information was collected about these 39 businesses and the 51 sites at which they operated in the Upper Delaware River Valley in 1980. The county planners were advised about conducting these interviews using standardized procedures as explained at a group work session and outlined in an interviewer's guidebook. All of the interviews were conducted in June and July 1980 with the cooperation of the business operators and managers. Only a few managers and operators refused to disclose certain types of information such as the number of rentals.

A second segment of the study involved a followup mail survey in September 1980 to determine the demand (i.e., rentals per month) since the interviews in early summer. Therefore, each operator or manager was sent a campground, boat livery, or hotel and motel followup mail survey form (Appendices D, E and F) by the county planner who had interviewed them in June. Followup survey information was obtained from 6 of the 10 campground businesses, 9 of the 13 boat liveries, and 14 of the 16 motels or hotels in the study after several reminders.

The analysis of this data will be subdivided according to topic and level of analysis (e.g., general business analysis vs. business type analysis vs. site analysis) as follows: (1) characteristics of the businesses is an analysis of the site data for information on number of years in operation, etc.; (2) estimates of supply and demand is an analysis of each of the three business types (campgrounds, boat liveries, and motels and hotels) for information on available rentals and those actually rented in 1980, etc.; (3) the attitudes of the business operators and managers regarding the Upper Delaware River management is an analysis of the general business data regarding opinions about the 1980 season, etc.; (4) labor force characteristics is an analysis of the general business data on

employment; and (5) economic impact of recreation businesses is an analysis of employment data and census data of selected services to estimate the combined payroll of these three business types and the relative contribution of each.

While the businesses included in the interview and mail followup surveys comprise a census of the study area, it should be remembered that some businesses would not provide certain information. Each table or figure presented in the results section has a notation to indicate the number of businesses (i.e., sites, business types, and general businesses) represented by that data table or figure. All businesses generally provided complete or partial data for each section of the analysis with the notable exception of those businesses which did not supply information on rentals. Since the larger campgrounds, boat liveries, and motels and hotels did supply rental information, the data can be used to represent the demand for Upper Delaware River Valley businesses. The assumption here is that the smaller businesses tend to rent the same proportion of their supply per month as do the larger businesses. This may not be exactly true but the potential bias in such an assumption is not large since the existing data includes the majority of the available supply.

Therefore, due to the relatively high response rate from the larger businesses the rental data are reasonably representative of all Upper Delaware River demand for each business type. However, the attitude data missing from the smaller businesses which did not respond to the mail followup survey would not be expected to be similar to those of larger businesses. Thus, certain attitude data underrepresent smaller businesses but the extent or direction of any potential bias cannot be estimated or determined from any existing data sources.

FINDINGS

Characteristics of Recreational Service Firms in the Upper Delaware River Valley

This section reviews selected characteristics of the three principal types of recreational service firms (i.e., hotels-motels, campgrounds, boat liveries) found in the Upper Delaware River Valley, and is primarily a site analysis. Knowledge of site characteristics enhances planners' and managers' understanding of the nature of these businesses, thereby ensuring that recreational businesses are considered appropriately in the planning process. Additionally, it is necessary to have this information to assess the potential of the existing sites (supply) to satisfy recreationists' demand for the types of facilities and services offered to them. The background provided by this section also helps place subsequent findings sections of this report in proper perspective.

Business Tenure

The hotels-motels in the Upper Delaware River Valley tend to be older, long established on their present sites, compared to campgrounds and boat liveries. The mean age of hotel-motel businesses was 51 years, while those of campgrounds and boat liveries were 10 and 15 years, respectively. The majority (63%) of hotels-motels have been in existence for over 25 years, whereas all campgrounds and most (87%) boat liveries were established after 1965. Sixty-eight percent of the boat liveries were started during the 1970's (Fig. 1 and Table G-1).¹

Trends in the tenure of management by current (1980) owners and operators for sites of each business type correspond to those reported above. That is, people managing the hotels-motels in the valley generally have been doing so longer than people managing campgrounds and boat liveries (averaging 20, 8, and 9 years, respectively). The percentage of owners and operators who came under control of their business sites within the last 10 years for hotels-motels is 37 percent, for campgrounds, 64 percent, and for liveries, 82 percent (Fig. 2 and Table G-1).

¹Tables preceded by the letter G indicate tables in Appendix G.

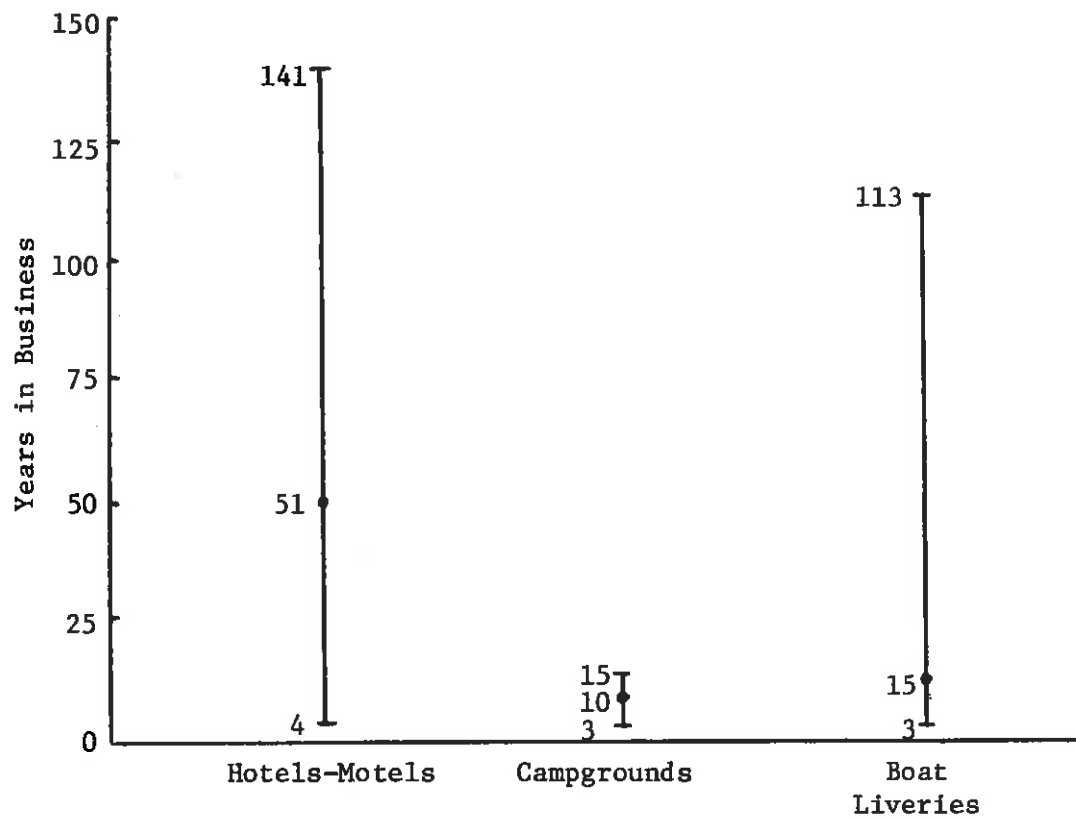


Figure 1. Mean years businesses of each type have been in existence at their present sites (range indicated by brackets). (See Table G-1 in Appendix G for details.)

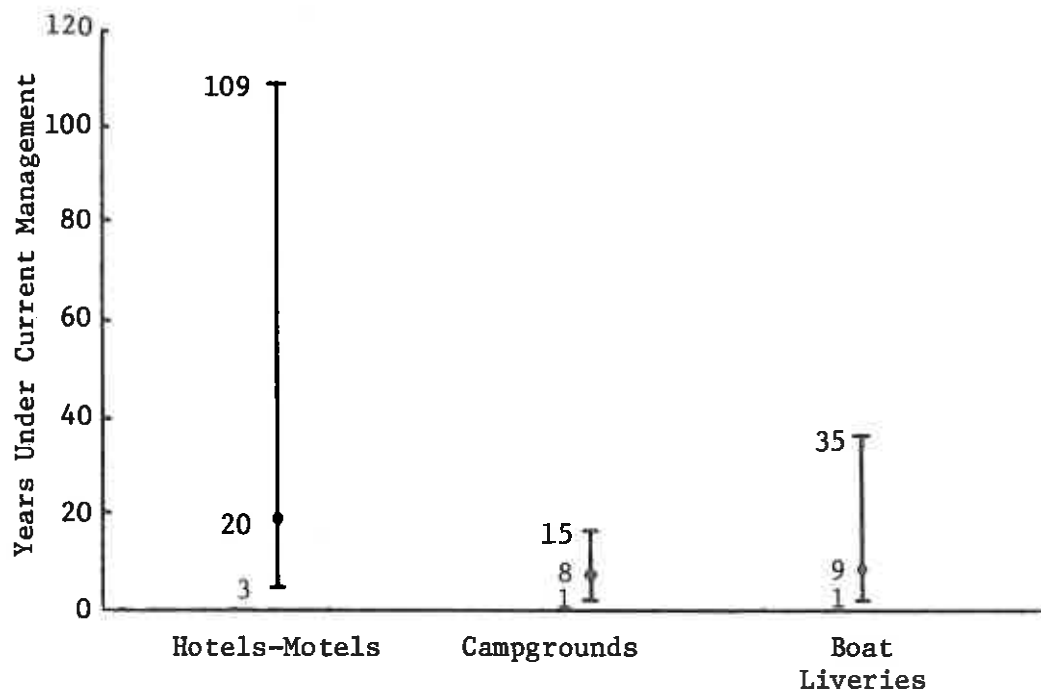


Figure 2. Mean years businesses of each type have been under current management (range indicated by brackets). (See Table G-1 in Appendix G for details.)

The establishment of campgrounds in the Upper Delaware River Valley in the late 1960s corresponds to the boom in popularity of RV camping during that period (Cole and LaPage, 1980). Boat livery operations also were established during a period when river recreation was increasing dramatically nationwide (Leatherberry et al., 1980).

Size (Acreage) and Expansion Potential of Sites

Hotel-motel sites in the Upper Delaware River Valley tend to be less land intensive than sites of the other two types of recreational service firms examined, having a mean of 7 developed acres, vs. 18 and 37 developed acres for boat liveries and campgrounds, respectively (Figure 3). The majority of hotel-motel sites (62%) were 1-5 acres, although two sites were over 100 acres (Table G-2). Operators of nearly 70 percent of these hotel-motel sites reported that they had enough area for expanding their facilities (Fig. 4). Most (52%) boat liveries were on developed sites of 1-5 acres, but over one-third (37%) were on sites exceeding 15 acres. The majority of boat livery sites (65%) had some undeveloped acreage typically 1-10 acres. Operators of 73 percent of the boat livery sites reported having area available for expansion of their facilities, either on their developed site or on their undeveloped property. Campgrounds were the most land intensive of the three types of sites studied. Two-thirds (64%) of the campgrounds utilized sites of over 15 acres; one-third (36%) were on sites of over 50 acres. Most (90%) campgrounds had undeveloped acreage for potential expansion, averaging 14 acres per site.

Overall, the majority of sites of all three types of businesses had areas suitable for expansion of their facilities, either on property already in use or on additional undeveloped land. Consequently, should the demand increase for the facilities and services offered by the three recreational business types, the existing operations seem to have the potential to expand to help meet this demand.

Types of Services and Facilities Offered by Recreational Service Firms in the Upper Delaware River Valley

Hotel-Motel Sites: Restaurants and bars were commonly available at hotel-motel sites. Less than half (44%) of the hotels-motels had swimming

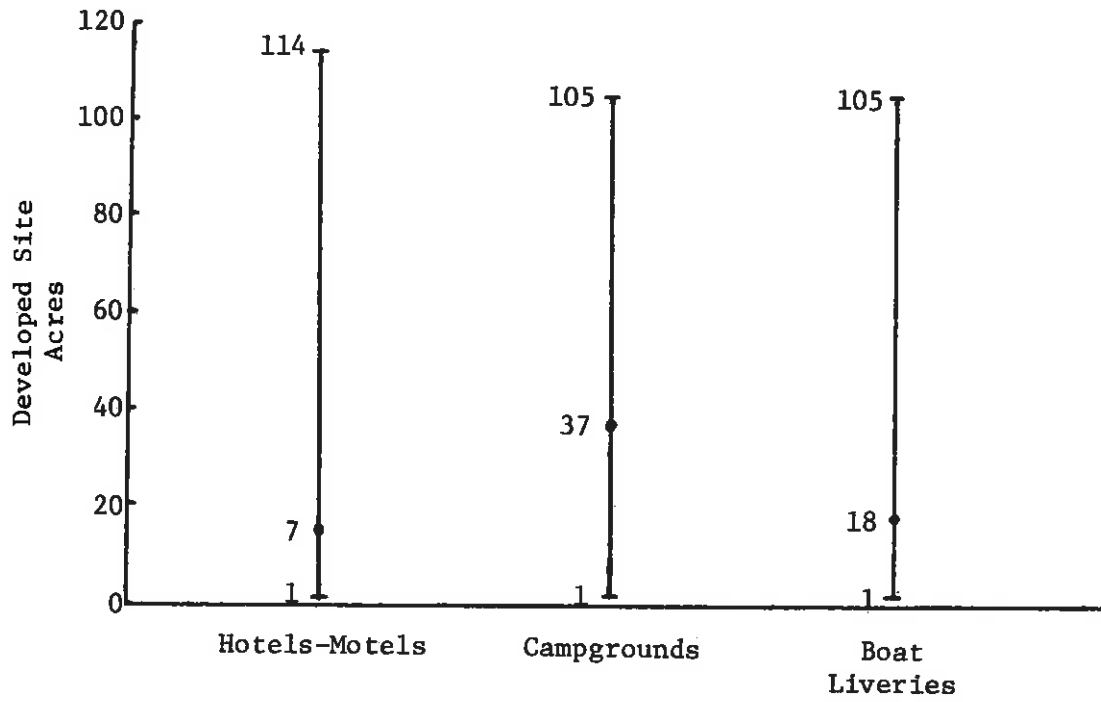
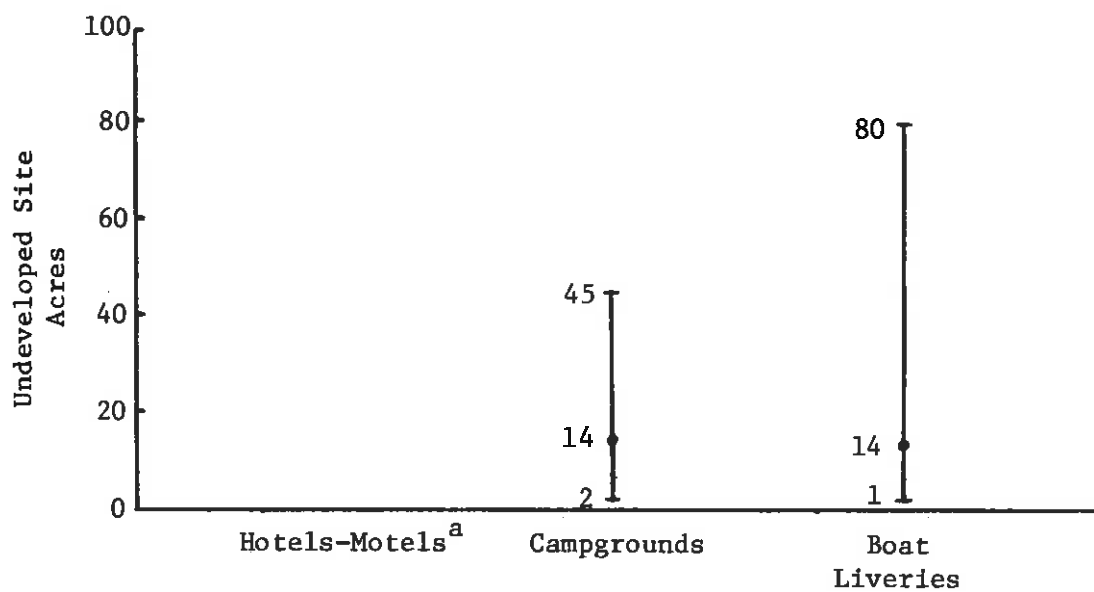


Figure 3. Mean acres of land developed at sites of each business type (range indicated by brackets). (See Table G-2 for details.)



^aThis information was not ascertained for hotel-motel sites because it would have little relevance to potential expansion possibilities.

Figure 4. For sites with undeveloped acreage, mean acres of land undeveloped at sites of each business type (range indicated by brackets). (See Table G-2 for details.)

pools. Only about 12 percent had boat liveries, but 25 percent offered a package plan with boating (Table 1).

Campground Sites: Most campgrounds in the Upper Delaware River Valley were developed with flush toilets (91%), showers (82%), and dump stations (82%). Less than half of the campgrounds had playgrounds (46%) and retail stores (46%); fewer had recreation halls (27%), swimming pools (27%), and laundry facilities (18%). Propane gas and gasoline were available for sale at 18 and 9 percent of the campgrounds, respectively. Only one campground site offered horseback riding (Table 2).

The most common type of rentals available at campgrounds were watercraft (canoe, kayak, raft, row boats). A few campgrounds offered overnight shelters (e.g., tents, trailers, lean-tos, cabins/cottages) (Table 2).

Boat Livery Sites: Nearly all (96%) boat livery sites offered return transportation for watercraft, and a majority (62%) had a similar service for boaters. Many (54%) boat liveries also offered guided boat trips for their clients. Canoe and kayak retail sales were available at many sites, also (75 and 50%, respectively). Overnight lodging facilities of various types (e.g., campgrounds, rental tents, lean-tos, rental cabins/cottages) were available at a few boat livery sites (details of these are reported in sections dealing with campgrounds and hotels-motels). Short-order food service and retail stores were available at 33 and 38 percent of the boat liveries, respectively (Table 3).

River Frontage of Recreational Service Firm Sites and Customer Access

Two hotel-motel sites had frontage on the Upper Delaware River, averaging 3000 feet (Fig. 5 and Table G-3). Both of these establishments allowed canoe-boat launching, fishing from shore and river wading or swimming (Table 4). Managers of most of the hotel-motel sites without river frontage advised customers who were interested in river recreation to go to the commercial (86%) or public (71%) river access areas.

Over three-fourths (78%) of the campground sites had river frontage, averaging nearly one-half mile (2520 feet) (Fig. 5 and Table G-3). All the campgrounds with frontage allowed canoe/boat launching and river

TABLE 1. PERCENT OF HOTELS-MOTELS (N = 16) OFFERING SELECTED SERVICES AND FACILITIES TO CUSTOMERS (SITE ANALYSIS)

| Services and Facilities | Percent |
|---------------------------|---------|
| Restaurant | 81.3 |
| Bar | 81.3 |
| Swimming pool | 43.8 |
| Retail store | 18.8 |
| Package plan with boating | 25.0 |
| Campground | 6.3 |
| Boat livery | 12.5 |
| Other facilities | 25.0 |

TABLE 2. PERCENT OF CAMPGROUNDS (N = 11) OFFERING SELECTED FACILITIES, SERVICES, AND RENTALS TO OVERNIGHT CAMPERS (SITE ANALYSIS)

| | Percent |
|--------------------|---------|
| <u>Facilities:</u> | |
| Showers | 81.8 |
| Flush Toilets | 90.9 |
| Dump Station | 81.8 |
| Laundry | 18.2 |
| Playground | 45.5 |
| Recreation Hall | 27.3 |
| Swimming Pool | 27.3 |
| Retail Store | 45.5 |
| Other facilities | 18.2 |
| <u>Services:</u> | |
| Gasoline sales | 9.1 |
| Propane Gas sales | 18.2 |
| Horseback Riding | 9.1 |
| Other services | 9.1 |
| <u>Rentals:</u> | |
| Canoe/kayak/raft | 72.7 |
| Other boats | 27.3 |
| Tents | 9.1 |
| Trailers | 18.2 |
| Cabins/cottages | 18.2 |

TABLE 3. PERCENT OF BOAT LIVERIES (N = 24) OFFERING SELECTED SERVICES AND FACILITIES TO BOATERS (SITE ANALYSIS)

| Services and Facilities | Percent |
|-----------------------------------|---------|
| Return transportation for boats | 95.8 |
| Return transportation for boaters | 62.5 |
| Guided boat trips | 54.2 |
| Canoe sales | 75.0 |
| Kayak sales | 50.0 |
| Campground | 33.3 |
| Lean-to sites | 12.5 |
| Rental cabins-cottages | 4.2 |
| Rental tents | 4.2 |
| Short-order food sales | 33.3 |
| Retail store | 37.5 |
| Other services | 16.7 |

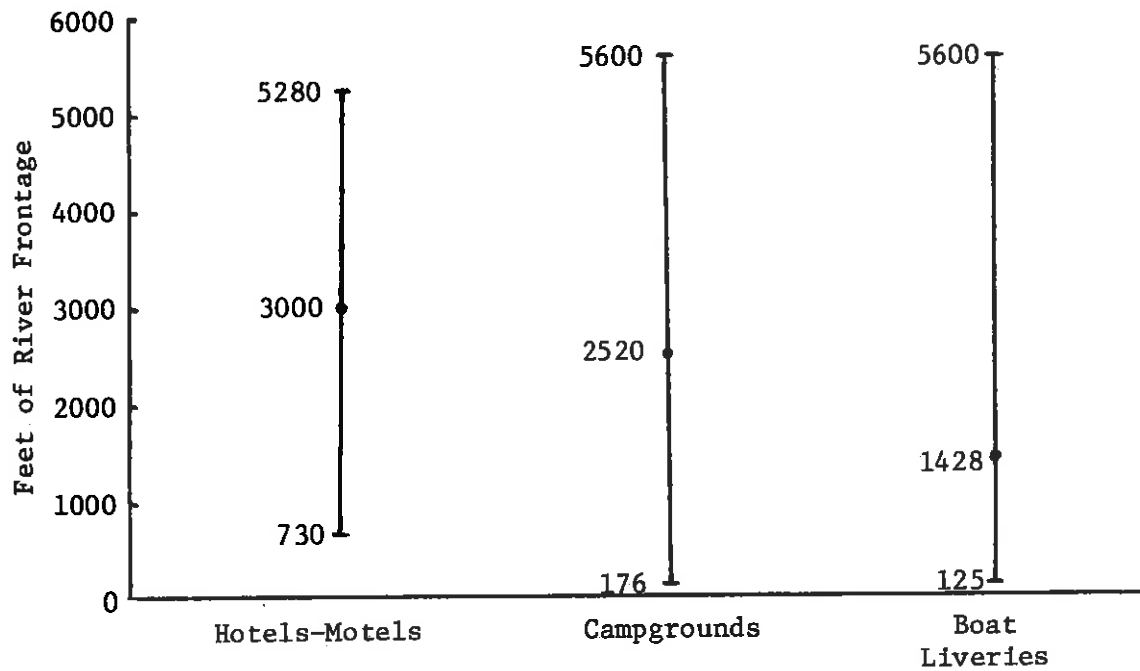


Figure 5. For sites with river frontage, mean feet of river frontage at sites of each business type (range indicated by brackets). (See Table G-3 for details.)

wading or swimming, and most (89%) allowed fishing along the shore (Table 4). Operators of the few campground sites without river frontage referred their customers to both commercial and public river access areas.

Most (88%) boat livery sites had river frontage, averaging 1428 feet (Fig. 5 and Table G-3). About half of those boat livery sites with river frontage had over 1,000 feet. Besides canoe/boat launching, most operators (95%) of boat livery sites permitted fishing along the shore and many (75%) allowed wading and swimming in the river (Table 4). All of the boat livery sites without river frontage sent customers to other commercial sites and three out of the four also directed people to public access sites.

Opening and Closing Dates for Recreation Service Firm Sites in the Upper Delaware River Valley

Hotel-Motel Sites: The majority (63%) of hotel-motel sites were open year-round. All were open by Memorial Day weekend and none closed before October 1 (Table 5 and Figure 6). The number of days these establishments were open averaged 308 days, ranging from 134 to 364 days.

Campground Sites: Most campground sites (73%) opened in April; the bulk of these opened during the last two weeks of April. All were open through September, but over half (55%) closed during October. Two campgrounds were open year-round (Table 5 and Figure 6). The average length of time campgrounds were open was 230 days.

Boat Livery Sites: No boat liveries opened before April. Most (74%) opened during the latter half of April, and about 20 percent opened in May. The first boat livery closings occurred during the last two weeks of September. Eighty-three percent closed in October and 13 percent closed later in the year (Table 5 and Figure 6). On the average, boat liveries were open 185 days, ranging from 123 to 244 days.

TABLE 4. CUSTOMER RIVER ACCESS AND RIVER-RELATED ACTIVITIES PERMITTED AT RECREATIONAL BUSINESS SITES (SITE ANALYSIS)

| Activities Permitted | Site Type | | | | | |
|--------------------------|-------------|-------|------------|-------|-------------|-------|
| | Hotel-Motel | | Campground | | Boat Livery | |
| | Those w/ | All | Those w/ | All | Those w/ | All |
| | Frontage | Sites | Frontage | Sites | Frontage | Sites |
| | Percent | | | | | |
| Canoe/boat launching | 100.0 | 12.5 | 100.0 | 81.8 | 100.0 | 83.3 |
| Fishing along shore | 100.0 | 12.5 | 88.9 | 72.7 | 95.0 | 79.2 |
| River wading or swimming | 100.0 | 12.5 | 100.0 | 81.8 | 75.0 | 62.5 |
| Number of sites | 2 | 16 | 9 | 11 | 20 | 24 |

TABLE 5. OPENING AND CLOSING DATES FOR RECREATION SERVICE FIRM SITES
(SITE ANALYSIS)

| | Site Type | | |
|--------------------------|-------------|------------|-----------------|
| | Hotel-Motel | Campground | Boat Livery |
| | Percent | | |
| <hr/> | | | |
| <u>Opening Date:</u> | | | |
| Jan 1-14 | 56.1 | 18.2 | 0.0 |
| Jan 15-Jan 31 | 6.3 | 0.0 | 0.0 |
| Feb 1-Feb 14 | 0.0 | 0.0 | 0.0 |
| Feb 15-Feb 28 | 6.3 | 0.0 | 0.0 |
| Mar 1-Mar 14 | 0.0 | 0.0 | 0.0 |
| Mar 15-Mar 31 | 0.0 | 0.0 | 0.0 |
| Apr 1-Apr 14 | 12.5 | 27.3 | 4.3 |
| Apr 15-Apr 30 | 0.0 | 45.4 | 74.0 |
| May 1-May 14 | 6.3 | 0.0 | 17.4 |
| May 15-May 31 | 12.5 | 9.1 | 4.3 |
| | <hr/> | <hr/> | <hr/> |
| | 100.0 | 100.0 | 100.0 |
| <u>Closing Date:</u> | | | |
| Sep 15-Sep 30 | 0.0 | 0.0 | 4.3 |
| Oct 1-Oct 14 | 6.3 | 18.2 | 13.0 |
| Oct 15-Oct 31 | 6.3 | 36.3 | 69.8 |
| Nov 1-Nov 14 | 0.0 | 9.1 | 4.3 |
| Nov 15-Nov 30 | 0.0 | 9.1 | 4.3 |
| Dec 1-Dec 14 | 6.3 | 9.1 | 4.3 |
| Dec 15-Dec 31 | 81.1 | 18.2 | 0.0 |
| | <hr/> | <hr/> | <hr/> |
| | 100.0 | 100.0 | 100.0 |
| Number of Sites | | | |
| | 16 | 11 | 23 ^a |

^a1 missing case.

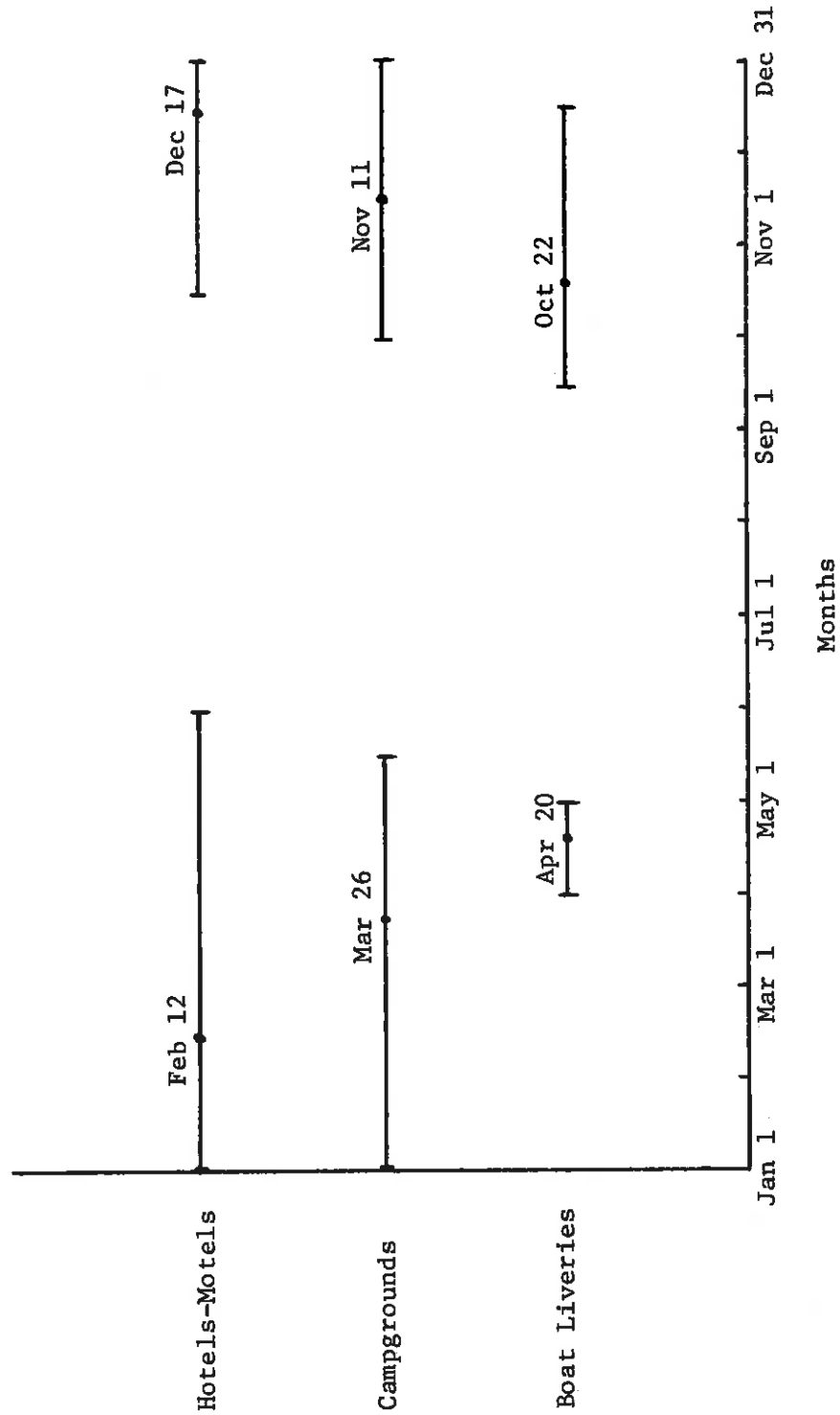


Figure 6. Average opening and closing dates (range indicated by brackets) at sites of each business type. (See Table 5 for numeric data.) (Site Analysis)

Estimates of Supply and Demand

This section will document the supply of rooms, campsites, and watercraft available for rental in the Upper Delaware River Valley and the demand for these. Additionally, factors affecting demand will be examined. Here overall businesses of each recreation service type, rather than sites as in the preceding section, are examined; that is, hotels-motels, campgrounds, or boat liveries under the same management are the units of analysis, regardless of how many sites a particular firm operates. Each of three types of recreation service businesses are reviewed separately. The information presented will help to describe further the characteristics of the recreation service businesses in the study area.

Hotel-Motel Businesses

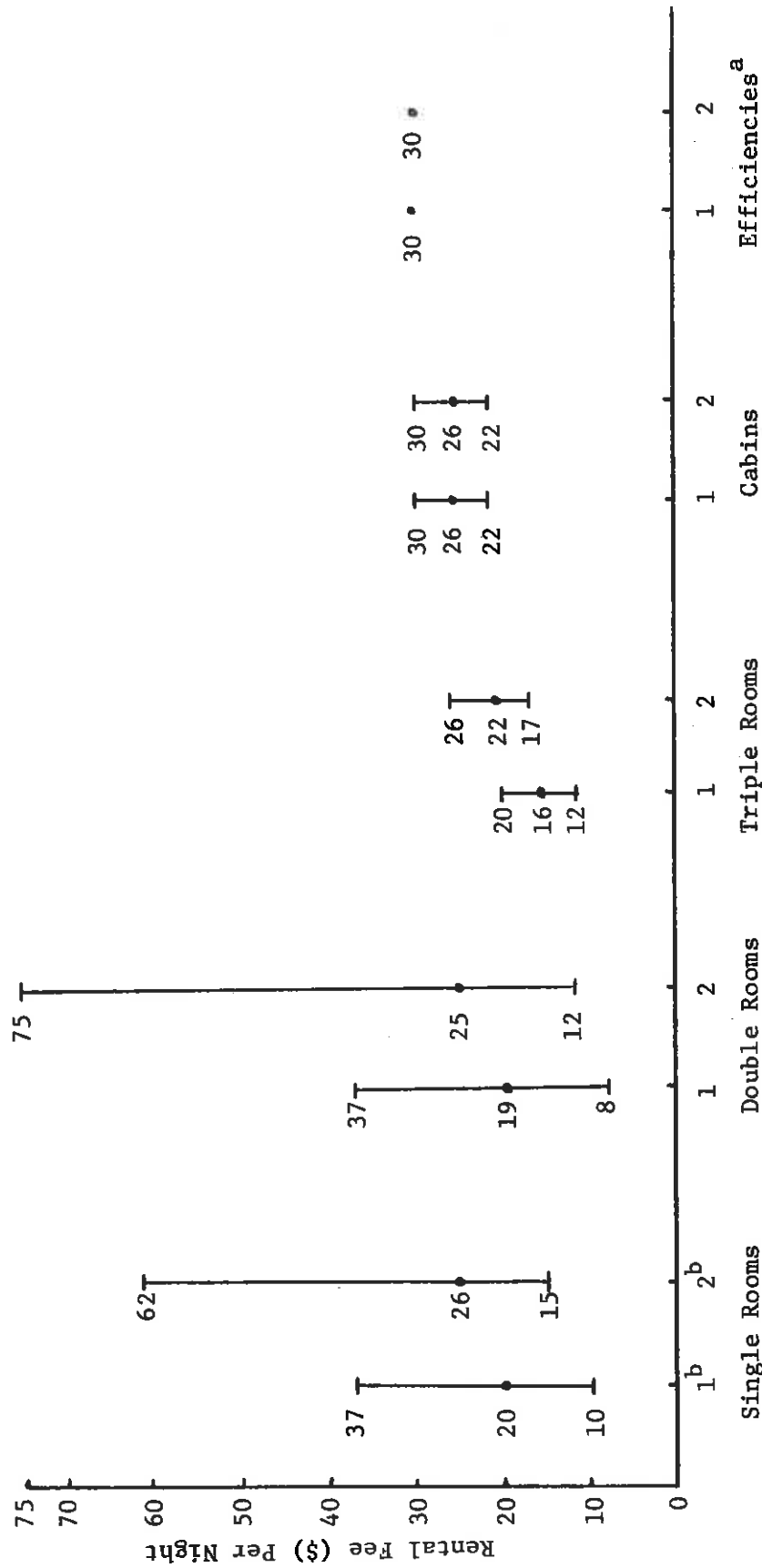
Number of Available Rental Units and Fees: The average number of rental units at hotels-motels in the Upper Delaware River Valley was 22, but the size of the establishments varied considerably. Six establishments had 10 or fewer rental units, while the largest had 150. Overall, there were 86 single rooms, 249 double rooms, 5 triple rooms, 5 cabins and 8 efficiencies, for a total of 353 rental units available in the study area in 1980. Double rooms were available at 88 percent of the hotel-motel establishments. The majority of the businesses had only 1 to 10 double rooms, but the largest establishment had 103 double rooms. One-half of the hotels-motels had single room accommodations, typically 1 to 10 single rooms, although one establishment had 47 single rooms (over 50 percent of those available). Triple rooms, cabins, and efficiencies were available at few (12% each) hotel-motel establishments in the study area (Table 6).

Average overnight rental fees for the various types of units ranged from \$16 to \$30 for 1 person to \$21.50 to \$30.00 for two people. Prices varied considerably for each type of unit (Figure 7). For example, the price of renting a double room ranged from \$8 to \$37 for one person and from \$12 to \$75 for two people.

Length of Stay in 1979 and 1980: Length of stay for customers at the various hotels-motels varied tremendously in 1979. Some establishments

TABLE 6. NUMBER OF RENTAL UNITS BY TYPE OF UNIT AT HOTELS-MOTELS (HOTEL-MOTEL BUSINESS ANALYSIS)

| Number of Rental Units | Types of Rental Units | | | | |
|------------------------------|-----------------------|-------------|-------------|--------|--------------|
| | Single rms. | Double rms. | Triple rms. | Cabins | Efficiencies |
| | Percent | | | | |
| 0 | 50.0 | 12.5 | 87.5 | 87.5 | 87.5 |
| 1-10 | 37.4 | 50.0 | 12.5 | 12.5 | 12.5 |
| 11-20 | 6.3 | 12.5 | 0.0 | 0.0 | 0.0 |
| 21-30 | 0.0 | 18.7 | 0.0 | 0.0 | 0.0 |
| 31-40 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 41-50 | 6.3 | 0.0 | 0.0 | 0.0 | 0.0 |
| >50 | 0.0 | 6.3 | 0.0 | 0.0 | 0.0 |
| Total Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Mean | 5.4 | 15.6 | 0.3 | 0.3 | 0.5 |
| Range | 0-47 | 0-103 | 0-3 | 0-4 | 0-4 |
| Total | 86 | 249 | 5 | 5 | 8 |
| Number of Businesses | 16 | 16 | 16 | 16 | 16 |



^aOnly 1 establishment provided this type of rental unit.

^bIndicates occupancy in room as one or two people.

Figure 7. Average rental fees per night by type of unit at hotels-motels (range indicated by brackets).
(Hotel-Motel Business Analysis).

had no one night guests while others relied almost entirely on one-night stays. On the other hand, some had no guests staying four or more nights while one had a majority of guests stay at least four nights (Table 7). One- and two-night stays represented the majority of rentals for 25 and 37 percent, respectively, of hotel-motel businesses in the Upper Delaware River Valley. Only one establishment reported that most (70%) of its rentals were for 4 or more nights. The remaining 5 firms had no length of stay category comprising the majority of their business in 1979. It is noteworthy that 38 and 31 percent of the hotels-motels reported no 3-night or 4-or-more-night stays in 1979 (Table 7).

Most (77%) hotel-motel managers reported that the average length of stay of their customers in 1980 was the same as that experienced in 1979. About 15 percent reported that their 1980 customers stayed longer and 8 percent reported shorter stays.

Percentage of New Customers in 1979 and 1980: Overall, hotel-motel managers believed that 20 percent of their patrons in 1980 were new customers. About 69 percent of the hotel-motel managers considered the proportion of new customers in 1980 to be about the same as in 1979. One out of five (23%) managers felt they had more new customers and 8 percent believed they had more repeat customers in 1980 vs. 1979.

Advance Reservations: Overall, about 83 percent of weekend customers made advance reservations, compared to 75 percent who did so for weekday lodging.

Residence Areas of Hotel-Motel Customers: Hotel-motel managers estimated that four out of five of their customers (79%) came from the metropolitan New York City area (i.e., New York City, Long Island, Westchester County [N.Y.], and Northeastern New Jersey). Less than 1 percent of their customers came from the five local NY-PA counties; 2.5 percent came from other New York State areas, 9 percent came from other Pennsylvania areas, and 8.5 percent came from elsewhere (Figure 8).

Occupancy in 1980 Compared to 1979: During May and June, 1980 average weekday hotel-motel occupancy increased from 6 percent in early May to

TABLE 7. ESTIMATED LENGTH OF STAY (OVERNIGHTS) OF HOTEL-MOTEL PATRONS
IN 1979 (HOTEL-MOTEL BUSINESS ANALYSIS)^a

| Estimated Percent of Patrons | Number of Nights | | | |
|---------------------------------|-------------------------------|-------|-------|-----------|
| | 1 | 2 | 3 | 4 or more |
| | Percent of Managers Reporting | | | |
| 0 | 6.3 | 0.0 | 37.5 | 31.3 |
| 1-25 | 43.8 | 37.4 | 56.2 | 62.4 |
| 26-50 | 25.0 | 25.0 | 6.3 | 0.0 |
| 71-75 | 12.5 | 18.8 | 0.0 | 6.3 |
| 76-100 | 12.5 | 18.8 | 0.0 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |
| Number of Businesses | 16 | 16 | 16 | 16 |

^aFor example, 6.3 percent of the managers reported that none of their patrons stayed for only one night; 43.8 percent reported that 1 to 25 percent of their patrons stayed for one night, etc.

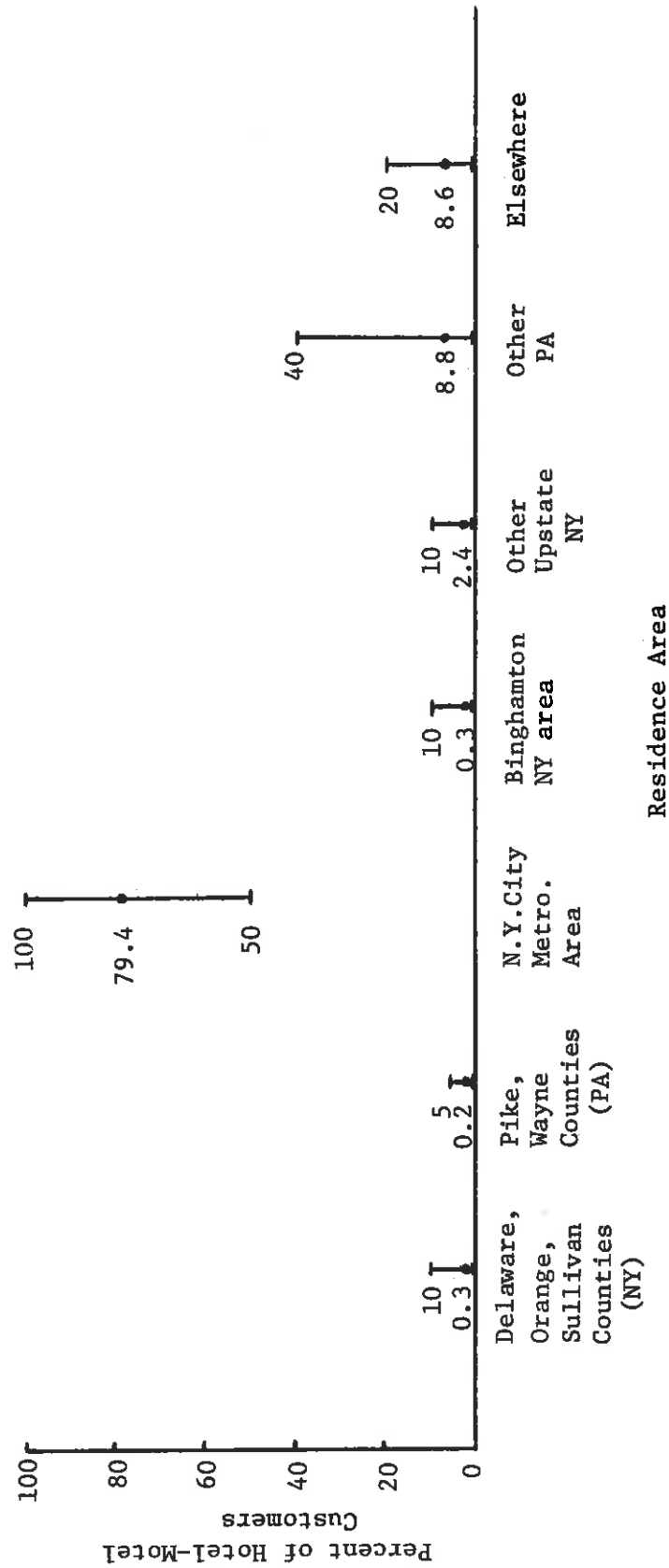


Figure 8. Overall percentage of hotel-motel customers who came from various residence areas (range in percentages reported by individual business managers is designated by brackets). (Hotel-Motel Business Analysis)

38 percent at the end of June. Typical weekend occupancy during May and June ranged from 56 to 67 percent except for Memorial Day weekend during which occupancy was about 88 percent. During July and August through Labor Day weekend, weekday occupancy averaged about 65 percent, while weekend occupancy averaged about 83 percent. Occupancy dropped off during the first two weeks of September; weekdays averaged 32 percent while weekends averaged about 56 percent (Figure 9 and Table G-4).

About half (50%) of the hotel-motel operators in the area believed their business in 1980 was up from 1979, their estimated increases ranging from 1 to 15 percent. About one-quarter (25%) believed their business dropped off in 1980, their estimated decreases ranging from 3 to 50 percent, while the remaining operators (25%) perceived no change.

The majority (70%) of hotel-motel operators reported that only 10 percent or less of their total gross receipts were received during the first quarter of the year; 50 percent reported no receipts during the first quarter (Table 8). The percentage of gross receipts generally increased during the second and third quarters; 30 percent of the hotels-motels received over half of their gross receipts during the third quarter. Only one hotel-motel establishment received the majority (100%) of their total gross receipts during the fourth quarter; for most it was 30 percent or less.

Big game hunters, sightseers, enroute travelers, and small game hunters were identified as fourth-quarter customers by 90, 45, 45, and 27 percent, respectively, of hotel-motel managers. Apparently, hunters and fall foliage sightseers made a significant contribution to the hotel-motel businesses since the 4th quarter was the second busiest in terms of gross receipts for those businesses reporting.

Campground Businesses

Number of Available Campsites: The average number of campsites at campgrounds in the Upper Delaware River Valley was 92. The size of campgrounds ranged from as few as four and five sites to as many as 300 sites. Six basic types of campsites comprised the 923 total sites available in 1980 at campgrounds in the study area. These types and the number of sites were

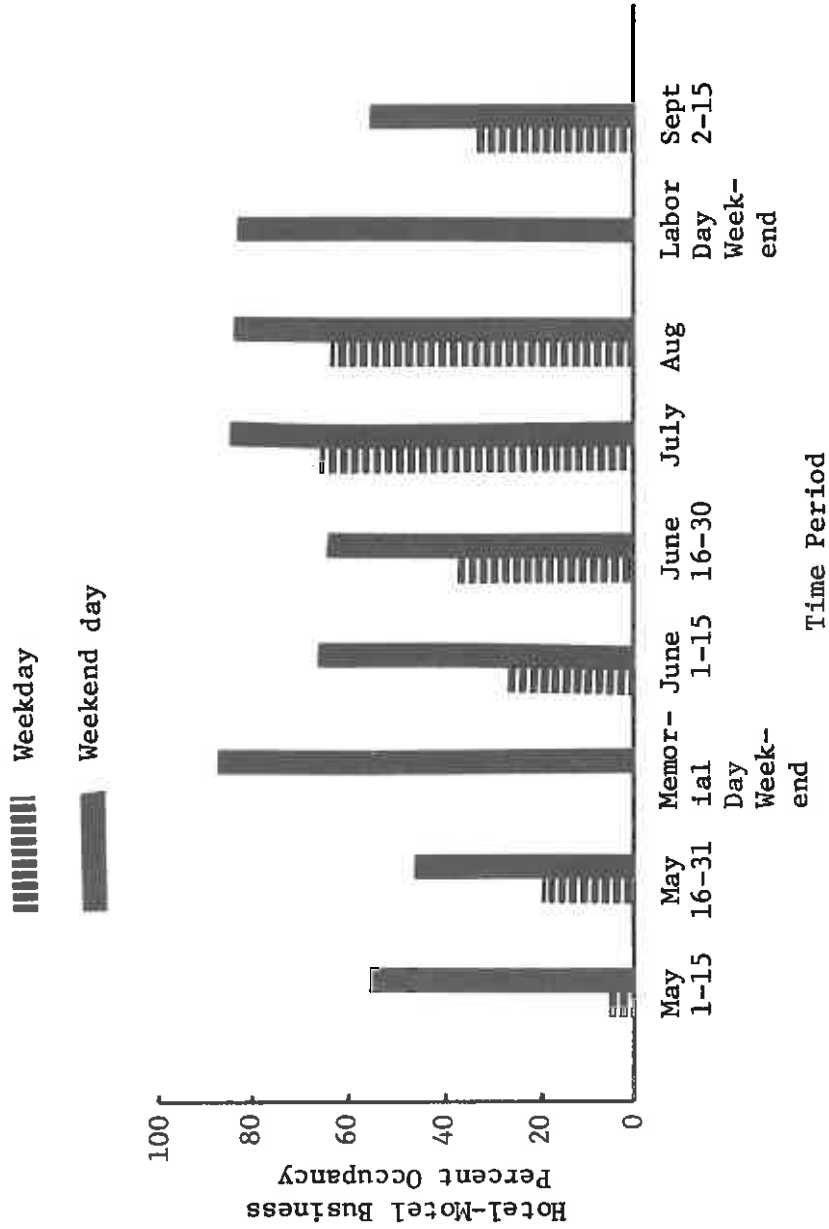


Figure 9. Average weekday and weekend hotel-motel occupancy between 1 May and 15 September 1980 (see Table G-4 for specific data). (Hotel-Motel Business Analysis)

TABLE 8. ESTIMATED PERCENT ANNUAL GROSS RECEIPTS OF HOTEL-MOTEL BUSINESSES
BY QUARTER (HOTEL-MOTEL BUSINESS ANALYSIS)

| Percent Gross Receipts | 1st Quarter (Jan-Mar) | 2nd Quarter (Apr-Jun) | 3rd Quarter (Jul-Sep) | 4th Quarter (Oct-Dec) |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Percentage of Businesses | | | |
| 0 | 50.0 | 10.0 | 10.0 | 0.0 |
| 1-10 | 20.0 | 20.0 | 0.0 | 10.0 |
| 11-20 | 20.0 | 30.0 | 0.0 | 10.0 |
| 21-30 | 10.0 | 30.0 | 30.0 | 50.0 |
| 31-40 | 0.0 | 10.0 | 30.0 | 20.0 |
| 41-50 | 0.0 | 0.0 | 0.0 | 0.0 |
| 51-60 | 0.0 | 0.0 | 10.0 | 0.0 |
| 61-70 | 0.0 | 0.0 | 10.0 | 0.0 |
| 71-80 | 0.0 | 0.0 | 10.0 | 0.0 |
| 81-100 | 0.0 | 0.0 | 0.0 | 10.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |
| Number | 10 | 10 | 10 | 10 |

as follows: tent (374), RV with all hookups (41), RV with electricity and water (221), RV with no hookups (25), lean-to shelters (64), and overflow tent areas (198).

The capacities of the campgrounds by the different categories of campsites varied considerably. The number of tent sites at those campgrounds having them (90%) ranged from fewer than 10 to 150. Only 30 percent of the campgrounds had RV sites with all hookups (i.e., electricity, water, sewage). More campgrounds (50%) had RV sites with electric and water hookups. The number of such sites at those campgrounds ranged from fewer than 10 to 100. Only one campground had RV sites (25 sites) with no hookups. Lean-to shelters were available at 30 percent of the campgrounds. Two-thirds of the campgrounds had overflow camping areas, with use capacities ranging up to the equivalent of 50 sites (Table 9).

Average overnight rental fees for various types of sites ranged from \$5 for an RV site with no hookups to \$10 for a lean-to. Prices varied considerably from one campground to another for the same type of site, especially for tent sites (\$2-\$15), lean-to shelters (\$3-\$15) and overflow area sites (\$5-\$20) (Figure 10).

Length of Stay in 1979 and 1980: Half of the campgrounds had seasonal site rentals in 1980; two had 6 seasonal sites rented, two had 15 seasonal sites rented, and one had 16 seasonal sites rented.

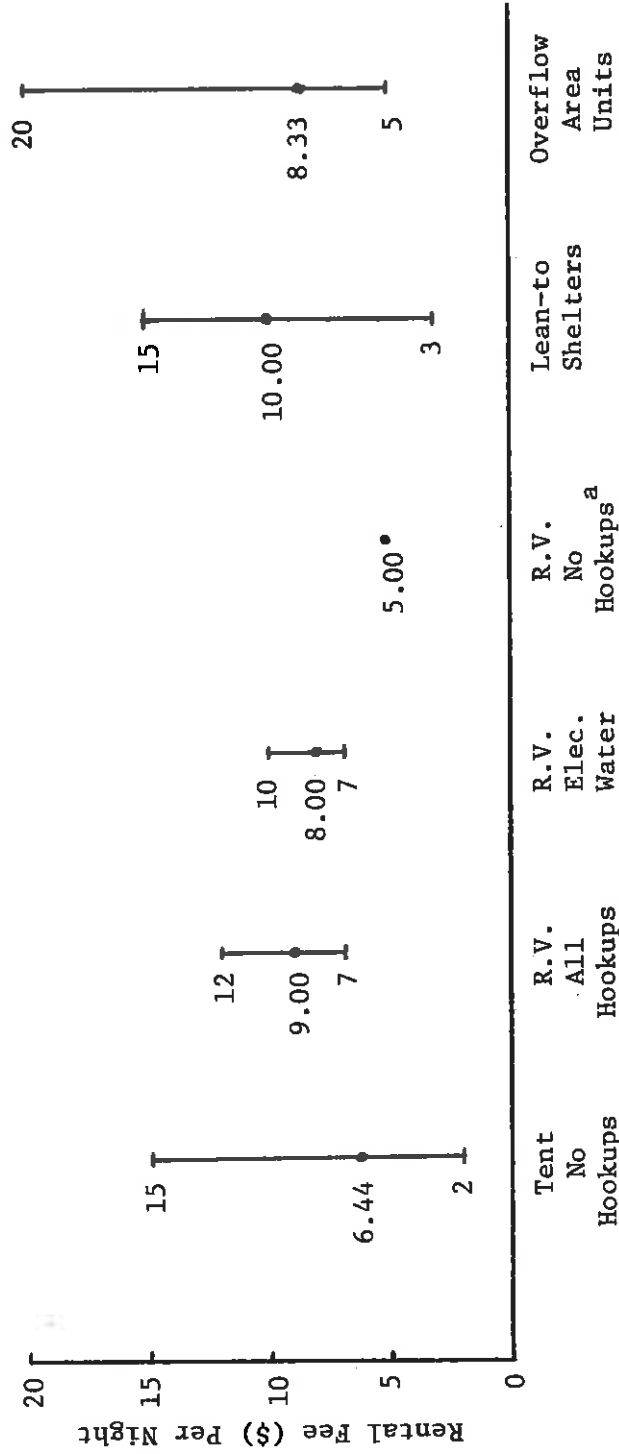
One- and two-night stays represented the majority of rentals for 10 and 40 percent, respectively, of campground businesses in the Upper Delaware River Valley. The remaining campground firms had no length of stay category comprise the majority of their business in 1979. One campground had no one-night campers, but all had some two-night customers. The majority of campground firms had campers stay for periods of 3, 4-6, and 7-14 nights, but only 2 campground businesses had any campers stay for more than 14 nights (excluding seasonal rentals) (Table 10).

Fifty percent of the campground operators reported that compared to 1979, campers in 1980 stayed longer at their campgrounds. The other 50 percent felt campers length of stay was about the same in 1980 as 1979.

Percentage of New Campers in 1979 and 1980: Overall, campground managers believed that 19 percent of their campers in 1980 were new customers.

TABLE 9. NUMBER OF CAMPSITES BY TYPE OF CAMPSITE (CAMPGROUND BUSINESS ANALYSIS)

| Number of Sites | Type of Site | | | | | | |
|-------------------------|--------------|-------------|---------------|------------|----------|------------|--|
| | Tent | Rec. Veh. | Rec. Veh. | Rec. Veh. | Lean-to | Overflow | |
| | No Hookups | All Hookups | Elec. & Water | No Hookups | Shelters | Area Units | |
| | Percent | | | | | | |
| 0 | 10.0 | 70.0 | 50.0 | 90.0 | 70.0 | 33.0 | |
| 1-10 | 20.0 | 10.0 | 20.0 | 0.0 | 20.0 | 22.0 | |
| 11-20 | 20.0 | 20.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| 21-30 | 20.0 | 0.0 | 10.0 | 10.0 | 0.0 | 0.0 | |
| 31-40 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 12.0 | |
| 41-50 | 10.0 | 0.0 | 0.0 | 0.0 | 10.0 | 33.0 | |
| 51-60 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| 61-70 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| 71-80 | 10.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| 81-90 | 0.0 | 0.0 | 10.0 | 0.0 | 0.0 | 0.0 | |
| 91-100 | 0.0 | 0.0 | 10.0 | 0.0 | 0.0 | 0.0 | |
| >100 | 10.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Total Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | |
| Mean | 37.4 | 4.1 | 22.1 | 2.5 | 6.4 | 19.8 | |
| Range | 0-150 | 0-19 | 0-100 | 0-25 | 0-50 | 0-50 | |
| Total | 374 | 41 | 221 | 25 | 64 | 198 | |
| Number of Businesses | 10 | 10 | 10 | 10 | 10 | 9 | |



^aReported by only one campground.

Figure 10. Mean rental fees per night, by type of campsite (range in fees charged by individual businesses is designated by brackets). (Campground Business Analysis)

TABLE 10. ESTIMATED LENGTH OF STAY (OVERNIGHTS) OF CAMPERS IN 1979
(CAMPGROUND BUSINESS ANALYSIS)^a

| Estimated Percent of Campers | Number of Nights | | | | | |
|---------------------------------|--------------------------------|-------|-------|-------|-------|-------|
| | 1 | 2 | 3 | 4-6 | 7-14 | >14 |
| | Percent of Operators Reporting | | | | | |
| 0 | 10.0 | 0.0 | 40.0 | 10.0 | 40.0 | 80.0 |
| 1-25 | 50.0 | 10.0 | 50.0 | 90.0 | 60.0 | 20.0 |
| 26-50 | 30.0 | 50.0 | 10.0 | 0.0 | 0.0 | 0.0 |
| 51-75 | 0.0 | 40.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 76-100 | 10.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Number | 10 | 10 | 10 | 10 | 10 | 10 |

^aFor example, 10.0 percent of the operators reported that none of their campers stayed for only one night; 50.0 percent reported that 1 to 25 percent of their campers stayed for one night, etc.

The majority (67%) of campground managers believed that the proportion of new customers was about the same in 1980 as in 1979. About 17 percent felt there were more new customers in 1980 compared to 1979, and 16 percent felt there were more repeat customers in 1980 vs. 1979.

Advance Reservations: All campgrounds accept advance reservations. Overall, about 74 percent of weekend campers and 60 percent of weekday campers reserved campsites in advance.

Residence Areas of Campers: Campground managers estimated that four out of five of their campers (84%) came from the metropolitan New York City area. Only about 3 percent of their customers came from the five local NY-PA counties; 5 percent came from other New York State areas, 6 percent came from other PA areas and 2 percent came from elsewhere (Figure 11).

Occupancy in 1980 Compared to 1979: During May and June, 1980 average weekday occupancy increased from 3 percent in early May to 12 percent at the end of June. Typical weekend occupancy for May and June ranged from about one-half to two-thirds capacity, except for Memorial Day weekend, during which occupancy was about 70 percent. During July and August through Labor Day weekend, weekday occupancy averaged about 25 percent, while weekend occupancy averaged about 70 percent. Occupancy dropped off markedly during the first two weeks of September; weekdays averaged 2 percent while weekends averaged about 34 percent (Figure 12 and Table G-5).

Most (67%) campground managers believed their business in 1980 was up from 1979, their estimated increases ranging from 10 to 25 percent. However, about one-third (i.e., all the other managers) thought their business was off in 1980, their estimated decreases ranging from 10 to 15 percent.

Two-thirds of the campground operators reported no annual gross receipts during the first quarter, whereas two-thirds reported the majority of their annual gross receipts were received during the third quarter (Table 11). The fourth quarter represented 10 percent or less of total gross receipts for four out of five campground businesses; one-third had no receipts during the last quarter. Thus, most of the campground business is during April through September.

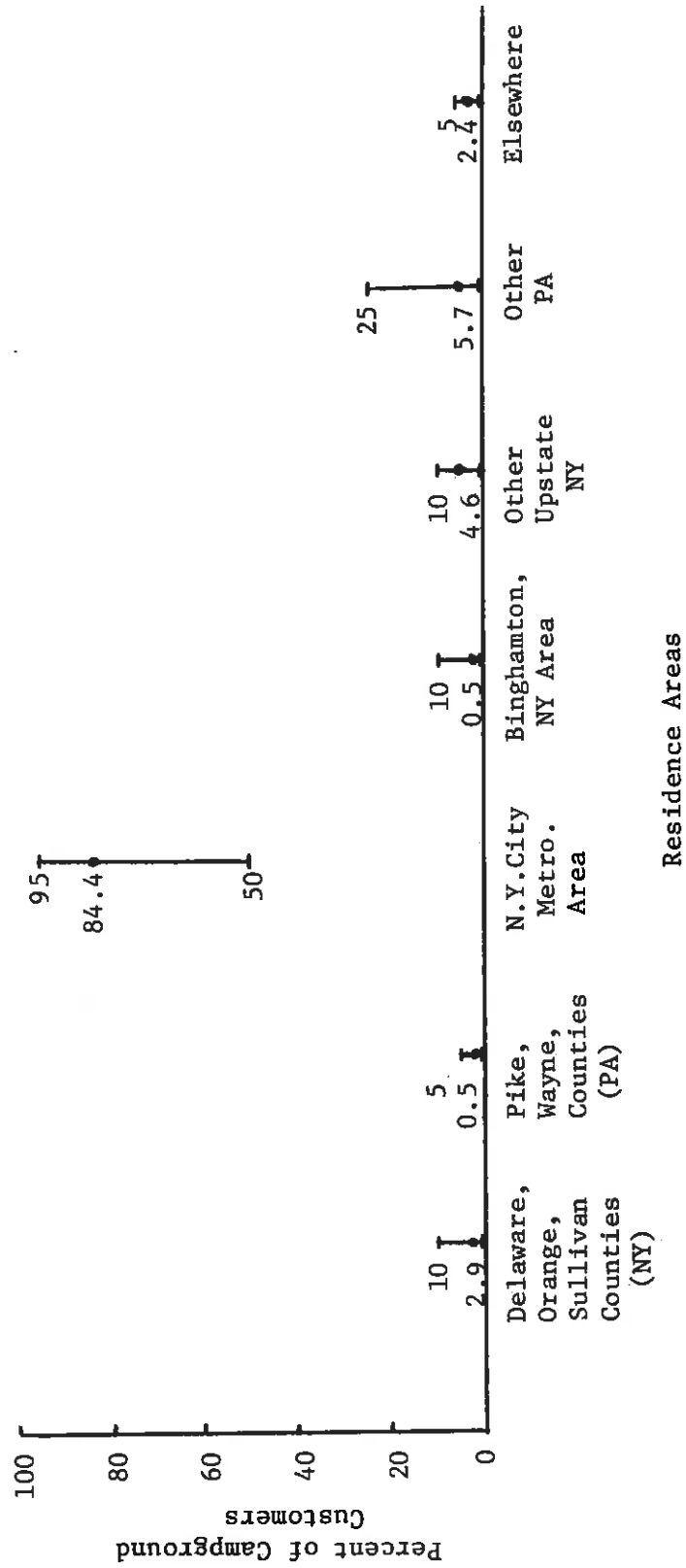


Figure 11. Overall percentage of campers who came from various residence areas (range in percentages reported by individual businesses is designated by brackets). (Campground Business Analysis)

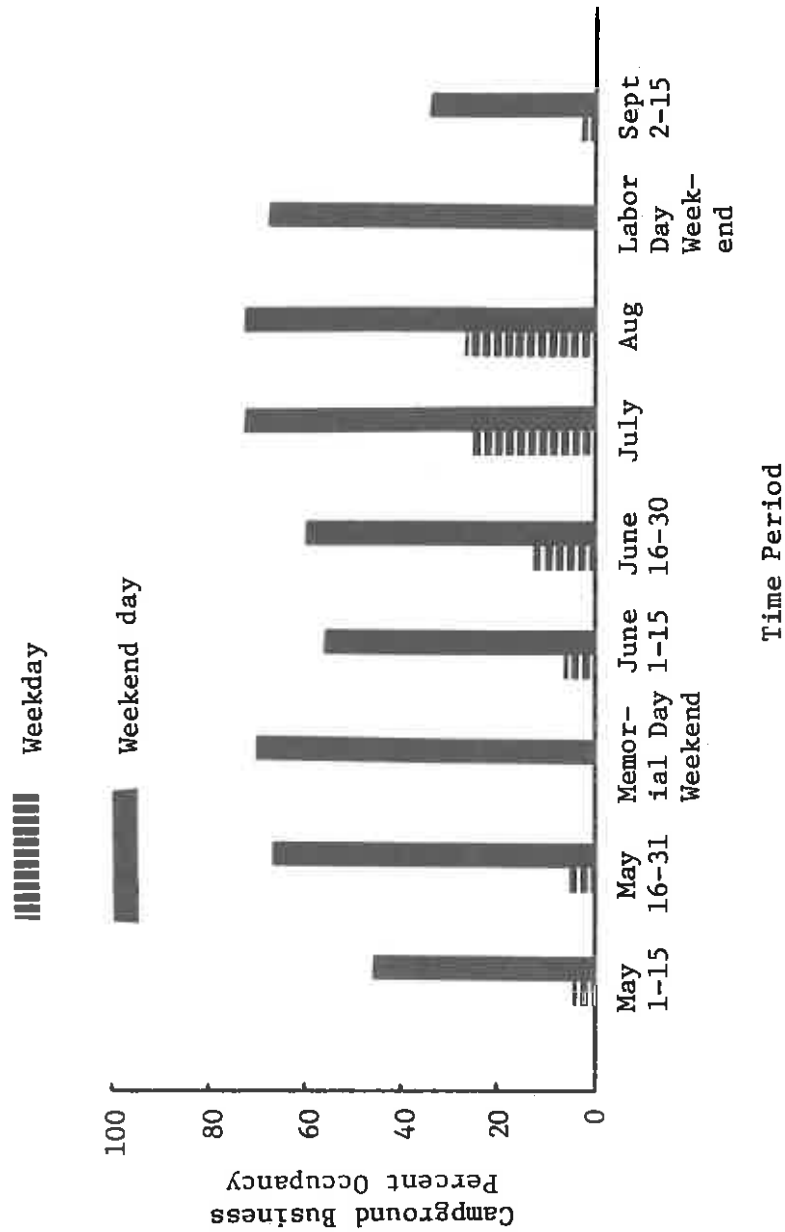


Figure 12. Average weekday and weekend campground occupancy between 1 May and 15 September 1980 (see Table G-5 for specific data). (Campground Business Analysis)

TABLE 11. ESTIMATED PERCENT ANNUAL GROSS RECEIPTS OF CAMPGROUND BUSINESSES,
BY QUARTER (CAMPGROUND BUSINESS ANALYSIS)

| Percent Gross Receipts | 1st Quarter (Jan-Mar) | 2nd Quarter (Apr-Jun) | 3rd Quarter (Jul-Sep) | 4th Quarter (Oct-Dec) |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Percent of Businesses | | | |
| 0 | 66.7 | 0.0 | 0.0 | 33.3 |
| 1-10 | 33.3 | 16.7 | 0.0 | 50.0 |
| 11-20 | 0.0 | 16.7 | 0.0 | 16.7 |
| 21-30 | 0.0 | 33.2 | 0.0 | 0.0 |
| 31-40 | 0.0 | 0.0 | 16.7 | 0.0 |
| 41-50 | 0.0 | 16.7 | 16.7 | 0.0 |
| 51-60 | 0.0 | 16.7 | 16.7 | 0.0 |
| 61-70 | 0.0 | 0.0 | 16.7 | 0.0 |
| 71-80 | 0.0 | 0.0 | 33.2 | 0.0 |
| 81-100 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |
| Number | 6 | 6 | 6 | 6 |

Sightseers, big game hunters, fishermen, canoeists, and enroute travelers were identified as fourth-quarter customers by 40, 40, 20, 20, and 20 percent, respectively, of campground operators. Apparently no one group made a very important contribution to 4th quarter gross receipts.

Boat Livery Businesses

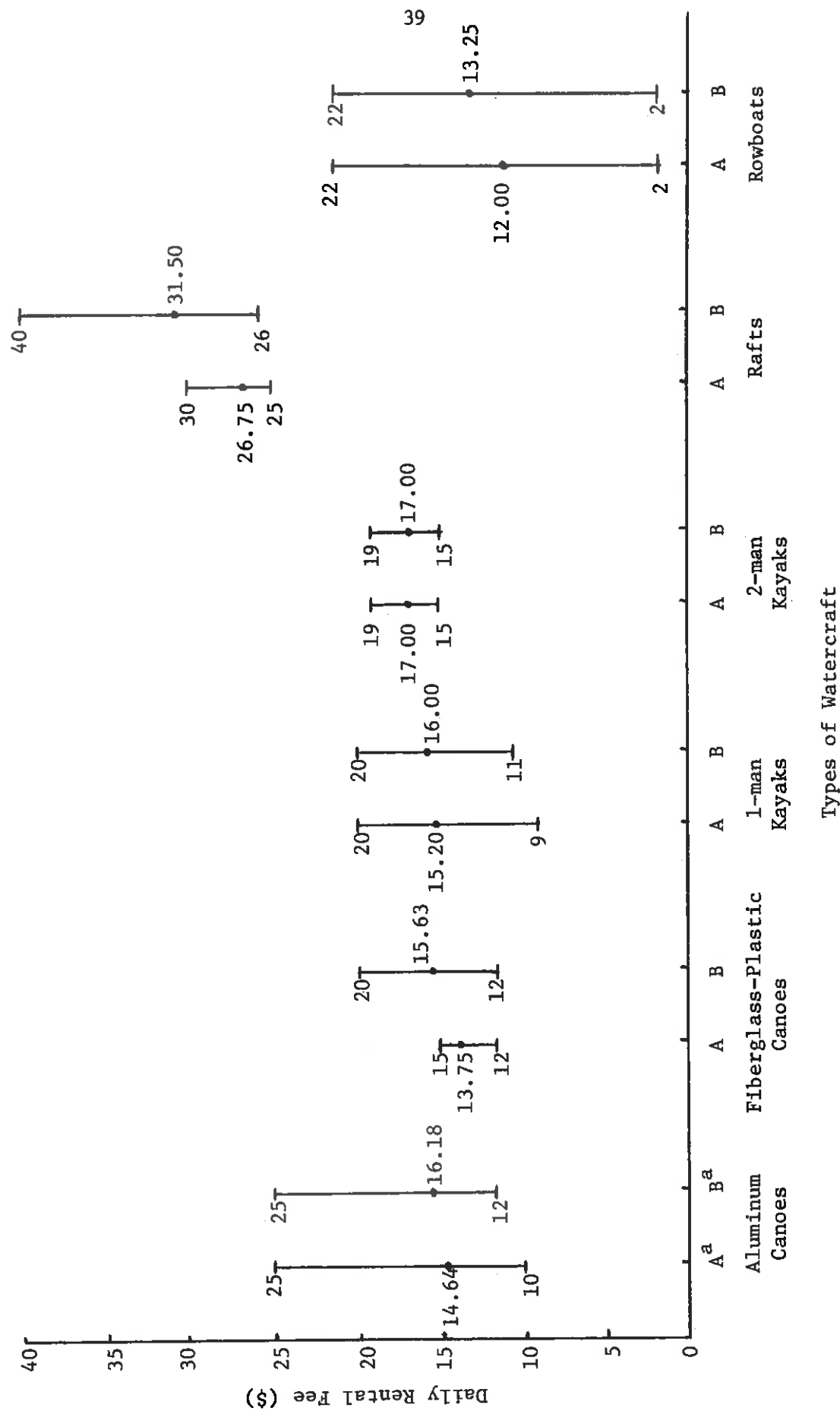
Number of Available Watercraft: The average number of watercraft available at boat liveries in the Upper Delaware River Valley was 274, but ranged from two to over 1,000. Six basic types of watercraft were available at the boat liveries operating in the study area (3566 total craft). The types of watercraft and number of each were as follows: aluminum canoes (2548), fiberglass/plastic canoes (788), 1-man kayaks (105), 2-man kayaks (61), rafts (43), and rowboats (21). There were extremely wide ranges in the number of watercraft available at each boat livery. The number of aluminum canoes at the liveries having them (85%) ranged from less than 10 to over 1,000, and the number of fiberglass canoes at liveries having them (60%) ranged from less than 10 to 350. Rowboats and rafts were in short supply, with each being available at three boat liveries and only two boat liveries had 2-man kayaks (Table 12).

Average daily rental fees for the various watercraft ranged from \$12 per weekday and \$13.25 per weekend day for rowboats to \$26.75 per weekday and \$31.50 per weekend day for rafts. Rental fees varied considerably from one boat livery business to the other for the same type of watercraft, especially for aluminum canoes (weekdays: \$10-\$25/day; weekend days: \$12-\$25/day), 1-man kayaks (weekdays: \$9-\$20; weekend days: \$11-\$20), and rowboats (weekdays and weekend days: \$2-\$22) (Figure 13).

Duration of Canoe Rentals in 1979 and 1980: Some boat livery operators relied entirely on one-day rentals for their business; others reported a majority of their rentals to be for two days. Longer stays did not contribute significantly to any boat livery operation. One- and two-day canoe rentals represented the majority of rentals for 69 and 15 percent, respectively, of boat livery businesses in the Upper Delaware River Valley.

TABLE 12. NUMBER OF WATERCRAFT AT BOAT LIVERIES BY TYPE OF WATERCRAFT (BOAT LIVERY BUSINESS ANALYSIS)

| Number of Watercraft | Type of Craft | | | | | |
|-------------------------|-----------------------------------|-------------------------------|-----------------|-----------------|-------|----------|
| | Aluminum Canoes | Fiberglass- Plastic Canoes | 1-man Kayaks | 2-man Kayaks | Rafts | Rowboats |
| | Percent of Boat Livery Businesses | | | | | |
| 0 | 15.4 | 38.5 | 61.5 | 84.6 | 69.2 | 69.2 |
| 1-10 | 7.7 | 7.7 | 15.4 | 7.7 | 23.1 | 30.8 |
| 11-20 | 7.7 | 23.0 | 0.0 | 0.0 | 7.7 | 0.0 |
| 21-30 | 0.0 | 0.0 | 15.4 | 0.0 | 0.0 | 0.0 |
| 31-40 | 15.4 | 7.7 | 7.7 | 0.0 | 0.0 | 0.0 |
| 41-50 | 15.4 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 |
| 51-75 | 0.0 | 0.0 | 0.0 | 7.7 | 0.0 | 0.0 |
| 76-100 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 101-200 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 201-300 | 0.0 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 |
| 301-400 | 7.7 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 |
| 401-500 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 501-1000 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| >1000 | 7.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Percent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Mean | 196.0 | 60.6 | 8.1 | 4.7 | 3.3 | 1.6 |
| Range | 0-1100 | 0-350 | 0-35 | 0-55 | 0-15 | 0-10 |
| Total | 2548 | 788 | 105 | 61 | 43 | 21 |
| Number of Businesses | 13 | 13 | 13 | 13 | 13 | 13 |



^aA indicates weekdays and B indicates weekend days.

Figure 13. Mean daily boat rental fees, by type of watercraft (range in fees charged by individual businesses is designated by brackets). (Boat Livery Business Analysis)

No length of stay category comprised a majority of rentals for the remaining 16 percent of the businesses in 1979. As the length of stay increased from 2 to 5 or more days, fewer businesses reported such rentals (Table 13).

Half of the boat livery operators reported that they observed little difference in the duration of watercraft rentals in 1980 compared to 1979. But, over one-third reported that their rentals tended to be for shorter periods in 1980.

Percentage of New Boaters in 1979 and 1980: Overall, boat livery operators believed that 35 percent of their boaters in 1980 were new customers. Half (50%) of the boat liverymen believed that they had about the same proportion of new customers in 1980 as in 1979, while all the others believed they had a greater proportion of new customers in 1980.

Advance Reservations: All but one boat livery accepted advance reservations. Seven out of 10 of the boat livery operators reported that the majority of their customers reserved canoes in advance; half reported that over 75 percent of their canoeists got advance reservations. Four out of five liverymen who rent kayaks reported that the majority of their kayakers did not make advance reservations.

Residence Areas of Boaters: Boat livery operators estimated that about 61 percent of their customers came from the metropolitan New York City area. Twelve percent of the boaters were from the five local NY-PA counties bordering the Upper Delaware River. About 11 percent of the boaters came from other New York State areas, 13 percent came from other Pennsylvania areas, and 3 percent came from elsewhere (Figure 14).

Watercraft Rental in 1980 Compared to 1979: For the entire period of 1 May to 15 September 1980, average weekday watercraft rentals varied from only 5 to 11 percent of the available watercraft (Figure 15). Weekend boat rentals in the first half of May averaged 42 percent of the fleet. During May 16 through June 30 about 67 to 75 percent of the available watercraft were rented on weekend days. Weekend use of rental boats diminished to 52 percent in both July and August, then to 44 percent on Labor Day weekend

TABLE 13. ESTIMATED DURATION OF CANOE RENTALS IN 1979 (BOAT LIVERY BUSINESS ANALYSIS)^a

| Estimated Percent of Boaters | Number of Days | | | | |
|---------------------------------|--------------------------------|-------|-------|-------|-----------|
| | 1 | 2 | 3 | 4 | 5 or more |
| | Percent of Operators Reporting | | | | |
| 0 | 0.0 | 7.6 | 30.8 | 61.5 | 69.2 |
| 1-25 | 0.0 | 38.5 | 69.2 | 38.5 | 30.8 |
| 26-50 | 30.8 | 38.5 | 0.0 | 0.0 | 0.0 |
| 51-75 | 38.4 | 15.4 | 0.0 | 0.0 | 0.0 |
| 76-100 | 30.8 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Number | 13 | 13 | 13 | 13 | 13 |

^aFor example, 30.8 percent of the operators reported that 26-50 percent of their canoeists rented canoes for one day; 38.4 percent reported that 51-75 percent of their canoeists rented canoes for one day; and 30.8 percent reported that 76-100 percent of their canoeists rented canoes for one day.

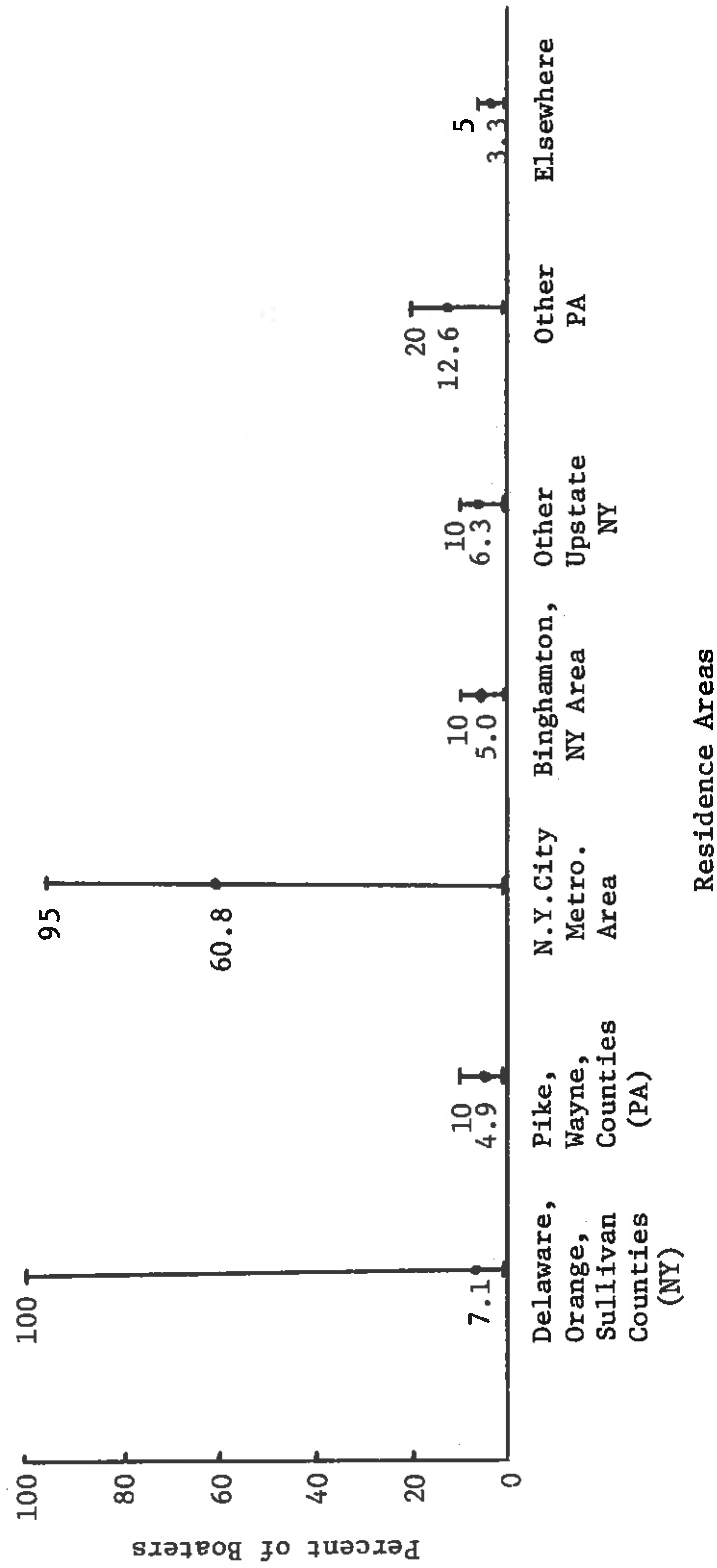


Figure 14. Overall percentage of boaters who came from various residence areas (range in percentages reported by individual businesses is designated by brackets). (Boat Livery Business Analysis)

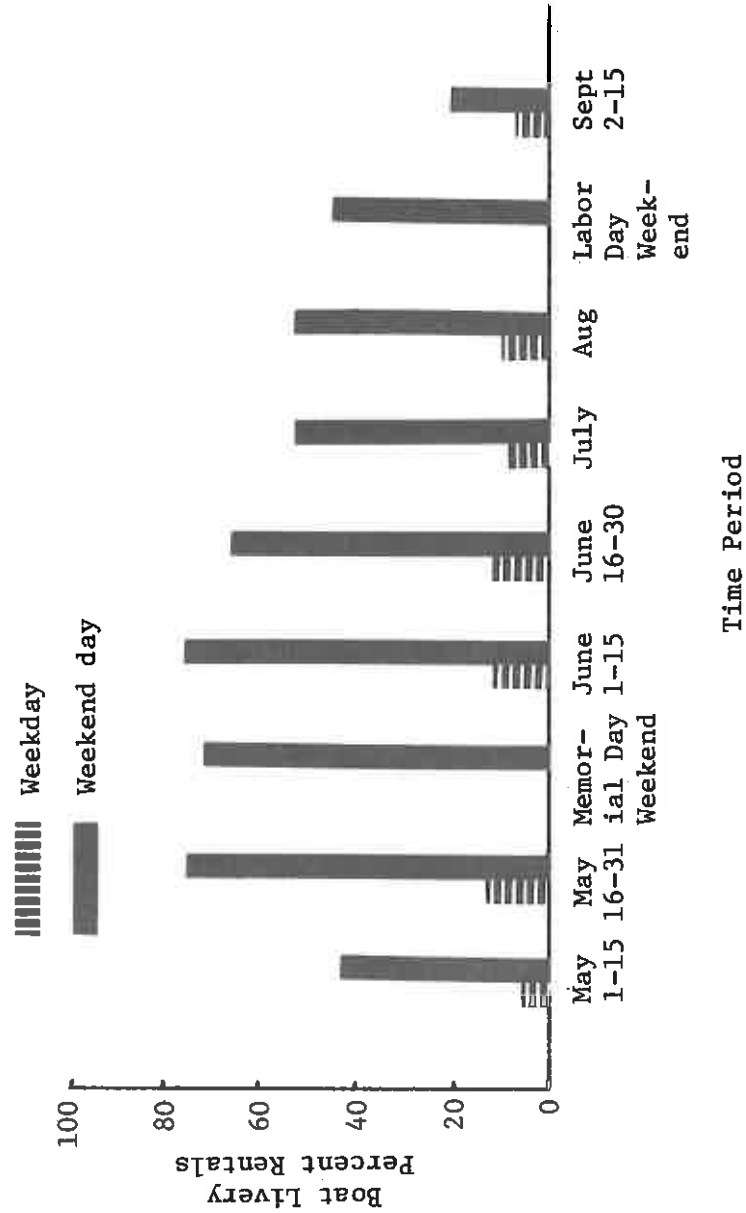


Figure 15. Average weekday and weekend boat rentals between 1 May and 15 September 1980 (see Table G-6 for specific data). (Boat Livery Business Analysis)

and 20 percent for weekend days during the first half of September (Figure 15 and Table G-6).

The majority of boat livery operators (62%) believed that their business in 1980 was up from 1979, their estimated increases ranging from 10 to 120 percent. One-quarter (25%) of the operators believed their business had decreased in 1980, their estimated decreases ranging from 11 to 75 percent, while the remaining operators perceived no change.

Only one boat livery business reported any annual gross receipts during the first quarter (Table 14). Gross receipts increased in the second and third quarters so that each contributed the majority of gross receipts for 43 and 57 percent, respectively, of boat livery businesses. The fourth quarter contributed little to annual gross receipts for the majority of businesses (57%). Thus, like campgrounds, most of the boat livery business takes place from April through September; the later fall, winter and early spring seasons contributing relatively little to the gross receipts of boat livery businesses in the area.

Services and Facilities Available to Non-Overnight Customers at Campgrounds and Hotels/Motels

While overnight customers at campgrounds and hotels-motels are most important to these businesses, other customers using specific services and facilities may contribute significantly to such businesses. The purpose of this section is to identify the types of services and facilities that are made available to non-overnight customers by campgrounds and hotel-motel businesses.

Three types of facilities were made available to day-use customers by a majority of campground operators: boating/canoeing, picnicking, and swimming. The majority of campgrounds having a retail store, horseback riding, and laundry facilities allowed day-use customers access to these services and facilities (Table 15).

Hotel-motel businesses generally allowed people access to restaurant and bar facilities, regardless of whether they were overnight guests. Two of the three hotel-motel establishments with retail stores made these available to non-overnight customers (Table 15).

TABLE 14. ESTIMATED PERCENT ANNUAL GROSS RECEIPTS OF BOAT LIVERY
BUSINESSES, BY QUARTER (BOAT LIVERY BUSINESS ANALYSIS)

| Percent Gross Receipts | 1st Quarter (Jan-Mar) | 2nd Quarter (Apr-Jun) | 3rd Quarter (Jul-Sep) | 4th Quarter (Oct-Dec) |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Percent of Businesses | | | |
| 0 | 85.7 | 0.0 | 0.0 | 42.9 |
| 1-10 | 14.3 | 0.0 | 0.0 | 42.9 |
| 11-20 | 0.0 | 14.3 | 0.0 | 14.2 |
| 21-30 | 0.0 | 14.3 | 14.3 | 0.0 |
| 31-40 | 0.0 | 28.6 | 28.6 | 0.0 |
| 41-50 | 0.0 | 0.0 | 0.0 | 0.0 |
| 51-60 | 0.0 | 28.6 | 42.8 | 0.0 |
| 61-70 | 0.0 | 0.0 | 14.3 | 0.0 |
| 71-80 | 0.0 | 14.3 | 0.0 | 0.0 |
| 81-100 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |
| Number | 7 | 7 | 7 | 7 |

TABLE 15. FACILITIES AND SERVICES AVAILABLE TO NON-OVERNIGHT CUSTOMERS OF RECREATIONAL BUSINESSES (CAMPGROUND AND HOTEL-MOTEL BUSINESS ANALYSIS)

| Facilities and Services | Percent Allowing Use By Non-Overnight Customers |
|-------------------------|-------------------------------------------------|
| <u>Campgrounds</u> | |
| Picnicking | 60.0 |
| Store | 30.0 |
| Playground | 20.0 |
| Swimming | 60.0 |
| Recreation Hall | 10.0 |
| Horseback Riding | 10.0 |
| Laundry | 10.0 |
| Boating/Canoeing | 70.0 |
| Number of Businesses | 10 |
| <u>Hotels-Motels</u> | |
| Restaurant | 62.5 |
| Bar | 68.8 |
| Swimming Pool | 6.3 |
| Shop-Store | 12.5 |
| Boat Launch | 6.3 |
| Other | 25.0 |
| Number of Businesses | 16 |

Generally, most of the hotel-motel and campground businesses having services or facilities which would be of use to non-overnight customers made these available to such people.

Advertising Outlets Utilized by Recreation Businesses

The vast majority of all three types of businesses advertised in county-state tourism guides. Most campground managers and boat livery operators also advertised via mail brochures and magazine ads, whereas a majority of hotel-motel businesses used newspaper ads (Table 16).

TABLE 16. ADVERTISING OUTLETS UTILIZED BY RECREATION SERVICE BUSINESSES
(CAMPGROUND, HOTEL-MOTEL AND BOAT LIVERY BUSINESS ANALYSES)

| Advertising Outlets | Business Type | | |
|-----------------------------|---------------|-------------|-------------|
| | Campground | Hotel-Motel | Boat Livery |
| | Percent | | |
| Mail Brochure | 70.0 | 37.5 | 84.6 |
| Newspaper Ads | 40.0 | 62.5 | 38.5 |
| Magazine Ads | 50.0 | 12.5 | 53.8 |
| Radio Ads | 20.0 | 31.5 | 38.5 |
| TV Ads | 10.0 | 6.3 | 7.7 |
| Campground guides | 40.0 | N.A. | N.A. |
| County-State tourism guides | 70.0 | 87.5 | 76.9 |
| Other | 60.0 | 56.3 | 38.5 |
| Number of Businesses | 10 | 16 | 13 |

Attitudes of Business Owners/Managers Regarding Management
of the Upper Delaware River Valley

Unless otherwise noted, this section reports responses of managers of all 31 general recreation businesses in the Upper Delaware River Valley. These general businesses can include one or more of the business types; for example, a general business may include both a campground and boat livery business.

Trend in Tourism Desired by Recreation Service Firm Managers in the Upper Delaware River Valley

Most managers or owners in the study would like to encourage more tourism. About seven out of 10 managers or owners would like more tourism in April through August, while eight out of 10 would like to see more tourism in September and October. Few managers or owners (3-6%) would like fewer tourists during any of the months listed above (Table 17).

Many of the people operating recreation service firms in the area apparently anticipate that tourism and outdoor recreation activity in the area will continue at current levels or increase since 42 percent of the firms plan to expand their operations to some extent in 1981.

Other Management Concerns

Law enforcement to regulate recreationist behavior, especially littering and trespassing, is a major concern among many people in the Upper Delaware River Valley, including recreation business managers. A majority of recreation business managers (54%) observed an increase in law enforcement effort in the corridor in 1980. Apparently, this is a reflection of federal funds made available to local governments specifically for this purpose.

The majority (68%) of managers surveyed had concerns about management of the Upper Delaware River Valley, but most (74%) had positive comments regarding current management and plans for future management. Three general concerns were expressed by 20 percent or more of those people with concerns: river management programs should (1) encourage more tourists, (2) enhance

TABLE 17. TREND IN TOURISM DESIRED BY RECREATION BUSINESS MANAGERS OR OWNERS (GENERAL BUSINESS ANALYSIS)

| Desired Trend | Time Period | | | |
|-------------------------|-------------|-------|---------|---------|
| | Apr-May | June | Jul-Aug | Sep-Oct |
| | Percent | | | |
| More | 67.7 | 74.2 | 74.2 | 80.6 |
| Same | 25.8 | 19.4 | 22.6 | 16.1 |
| Fewer | 6.5 | 6.5 | 3.2 | 3.3 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 |
| Number of Businesses | 31 | 31 | 31 | 31 |

additional recreational development, and (3) provide more river access -- all activities that would enhance the recreation service operations in the area.

Boat livery operators were asked three questions related specifically to boaters. Regarding trends in littering along the river by boaters, boat livery operators were evenly split between reporting that littering in 1980 was less or the same as in 1979. With respect to the amount of boater use, about nine out of 10 boat livery operators felt that crowding of boats on the river was not a problem, but nearly two-thirds would like to see canoeists and other boaters get more information on boating safety.

Labor Force Characteristics

The 31 recreation businesses along the Upper Delaware River Valley employed a mean of 11.3 workers in 1980. The large combination hotel-motel/campground/liveries employed an average of 39 workers, whereas businesses that consisted of only boat liveries employed a mean of 14.4 workers, hotels/motels averaged 7.6 employees, and campgrounds averaged 4.5 workers (Table 18). Although the employment in many of the businesses, especially campgrounds and liveries, is seasonal, the vast majority of all employment (approximately 83%) is full time. All types of businesses employ part-time seasonal help, but this is most prevalent in campgrounds.

In addition to providing employment for 115 owners or managers and members of their families, these businesses hired an additional 237 people in 1980, 215 (91%) of which were local residents. The majority of the nonlocal employees worked for the larger combination recreation businesses.

Owners, coowners, and their families comprised 36 percent of total full-time employment and 48 percent of total part-time employment of Upper Delaware River Valley businesses (Table 19). Local employees who were not from the owner's family constituted 57 percent of the full-time workweeks and 52 percent of the part-time workweeks. Nonlocal employees worked about 7 percent of all full-time workweeks; there was no part-time employment of nonresidents (Table 19).

TABLE 18. EMPLOYMENT OF RECREATION SERVICE BUSINESSES IN THE UPPER DELAWARE RIVER VALLEY, 1980
(GENERAL BUSINESS ANALYSIS)

| Type of Business | Weeks of Employment Provided | | | | | |
|-------------------------|------------------------------|-------|-----------|-------|----------------|-------|
| | Employees | | Full-time | | >20 Hours/Week | |
| | Mean | Total | Mean | Total | Mean | Total |
| Livery | 14.4 | 101 | 371.9 | 2603 | 59.1 | 414 |
| Hotel/Motel | 7.6 | 107 | 213.9 | 2994 | 36.1 | 505 |
| Campground | 4.5 | 18 | 60.5 | 242 | 26.0 | 104 |
| Livery/Campground | 12.0 | 48 | 257.2 | 1029 | 6.0 | 24 |
| Motel/Campground/Livery | 39.0 | 78 | 1246.0 | 2492 | 58.0 | 116 |
| Total | 11.3 | 352 | 301.9 | 9360 | 37.5 | 1163 |
| | | | | | 25.1 | 778 |

TABLE 19. EMPLOYMENT OF UPPER DELAWARE RIVER VALLEY RECREATION BUSINESSES, BY FAMILY AND NON-FAMILY EMPLOYMENT (GENERAL BUSINESS ANALYSIS)

| Employee Category | Employees | | Weeks of Employment Provided | | | | | |
|-------------------|-----------|--------|------------------------------|---------|----------------|---------|----------------|---------|
| | | | Full-time | | >20 Hours/Week | | <20 Hours/Week | |
| | Mean | Number | Total | Percent | Total | Percent | Total | Percent |
| Owner/Coowner | 1.7 | 53 | 2011 | 21.5 | 202 | 17.4 | 147 | 18.9 |
| Family Members | 2.0 | 62 | 1350 | 14.4 | 245 | 21.1 | 293 | 37.7 |
| Local | 6.9 | 215 | 5296 | 56.6 | 716 | 61.5 | 338 | 43.4 |
| Nonresident | 0.7 | 22 | 703 | 7.5 | 0 | 0.0 | 0 | 0.0 |
| Total | 11.4 | 352 | 9360 | 100.0 | 1163 | 100.0 | 778 | 100.0 |

Economic Impact of Recreation Businesses

The most direct impact of these 31 recreation businesses on the economy of the Upper Delaware River Valley which can be estimated from our data is their employment of 352 people, 330 of whom are local residents. The combined employment of these businesses corresponds to an estimated 10,426 weeks of full-time employment, or the equivalent of approximately 200 full-time year-round jobs in the Upper Delaware River Valley. Using census data (U.S. Bureau of the Census, 1973a and 1973b), we can estimate that approximately 3.5 percent of the entire labor force of the 15 townships in the Upper Delaware River area is employed by these businesses.

Payroll data were not obtained in the study, but if these businesses are typical of those reported in the Census of Service Industries in 1977 (Bureau of the Census, 1979a and 1979b), they would have a combined total payroll of approximately \$1.5 million, in 1980 current dollars. Treating campground, livery, and hotel/motel employment separately regardless of the various combinations that exist in Upper Delaware River Valley businesses, we would estimate that the hotel/motel sector contributes about 70 percent of this total payroll, liveries about 25 percent, and campgrounds about 5 percent.

DISCUSSION AND IMPLICATIONS

The information on business characteristics, supply and demand, and labor force characteristics reported herein for boat liveries, hotels-motels, and campgrounds have various implications for recreation planning by the public and private sectors. The integration of these data with the results from other Upper Delaware River Valley studies involving resident and nonresident recreationists, riparian landowners, and boaters on the Upper Delaware River will help provide a comprehensive overview of the needs, concerns and preferences of the various recreation-related interest groups along the Upper Delaware River Valley.

The 31 recreation service firms studied show evidence of being stable businesses capable of supplying the lodging and boat rental services currently demanded by the public. They have been in business an average of 8 and 9 years for campgrounds and boat liveries, and over 50 years for hotels/motels. Since the vast majority of small business failures occur within the first three years of operation, it appears likely that, regardless of whether they remain under present ownership and management, these businesses will continue to be open to service the needs of recreationists.

The occupancy and use rates of these firms in 1980 show that in aggregate their capacity exceeds the current recreational demand. Even on holiday weekends, hotel/motel occupancy was 83 percent, campground occupancy was about 70 percent, and about 75 percent of the aggregate supply of boats were rented. The majority of business owners and managers indicated they would like to see more business at all times of the year, and indicated that they have the ability for some expansion should it be warranted. The ability of existing firms to handle increased demand may be a primary reason why few additional firms have attempted to enter the market in recent years.

Two concerns expressed by many of these firms were for continued strong law enforcement efforts and for increased recreational access to the Upper Delaware River. About half of these firms acknowledged the

visibility of increased law enforcement efforts in 1980. Increased river access would give customers at boat liveries more options for choosing various origins and destinations, and trip lengths.

While we have indicated that these businesses have the capacity to provide the basic facilities and services needed by recreationists, and the nonresident recreationist survey includes an assessment of the relative difficulties of locating these businesses, we have no quantitative information that would indicate the specific quality of the services that these businesses provide. Such quality considerations as cleanliness of facilities, amount and accuracy of informational services, safety of watercraft, and courtesy of employees play a very influential role in the satisfaction of recreationists with their trip to the Upper Delaware River Valley.

Consideration of the characteristics of recreational businesses and their ability to supply the recreationists' demand for goods and services is a major component in any recreational planning process. The place of recreational businesses and their capabilities and deficiencies are only evident when viewed as one component of the tourism environment in the Upper Delaware River Valley:

- (1) The natural land and river environment which provides the attractions for visitor participation and enjoyment;
- (2) the services and facilities offered by the public and private sectors for visitors to support their recreational activities;
- (3) the informational services which help direct visitors to valley attractions, and services and facilities;
- (4) the visitors who come with needs, expectations, and the desire to participate in recreational activities; and
- (5) the availability of transportation and suitable traffic corridors which allow visitors to reach their destinations.

The study data presented in this report need to be combined with information on the other tourism components in the Upper Delaware River

Valley. This integration will help answer the questions on the complementary nature of recreational development in the public and private sectors, as well as issues relating to the guidelines and planning objectives being developed for the draft general management plan. This will aid planners and managers in their efforts to ensure that effective and efficient management plans and programs are developed in conjunction with the planning and management objectives which consider the needs and concerns of the various recreation-related interest groups in the Upper Delaware Scenic and Recreational River area.

LITERATURE CITED

- U.S. Bureau of the Census. 1973a. Census of Population: 1970 Vol. 1, Characteristics of the Population - Part 34, New York, Section 1 and 2. U.S. Government Printing Office, Washington, D.C.
- U.S. Bureau of the Census. 1973b. Census of Population: 1970 Vol. 1, Characteristics of the Population - Part 40, Pennsylvania, Section 1 and 2. U.S. Government Printing Office, Washington, D.C.
- U.S. Bureau of the Census. 1979a. 1977 Census of Service Industries: Geographic Area Series New York. U.S. Dept. of Commerce Publication SC77-A-33, Washington, D.C. 112 p.
- U.S. Bureau of the Census. 1979b. 1977 Census of Service Industries: Geographic Area Series Pennsylvania. U.S. Dept. of Commerce Publication SC77-A-39, Washington, D.C. 108 p.
- Cole, G. L. and W. L. LaPage. 1980. Camping and RV Travel Trends. In Proceedings of the 1980 National Outdoor Recreation Trends Symposium, Volume 1. USDA Forest Service Gen. Tech. Rep. NE-57, Northeastern Forest Experiment Station, Broomall, PA. pp. 165-177.
- Leatherberry, E. C., D. W. Lime and J. L. Thompson. 1980. Trends in River Recreation. In Proceedings of the 1980 National Outdoor Recreation Trends Symposium, Volume 1. USDA Forest Service Gen. Tech. Rep. NE-57, Northeastern Forest Experiment Station, Broomall, PA. pp. 147-164.

APPENDIX A

1980 BOAT LIVERY SURVEY INTERVIEW FORM
FOR THE UPPER DELAWARE RIVER STUDY

CONFIDENTIAL

1980 BOAT LIVERY SURVEY
UPPER DELAWARE RIVER STUDY

Name of Business: _____

Name of Owner/Manager: _____

Mailing Address: _____

Telephone Number: _____

Business Characteristics

1. How many years has this business been established (including 1980 season)?

_____ years

2. How many years has the business been under its current management (including 1980 season)? _____ years

3. Supply of watercraft for rent and daily fees:

| | <u>Number</u> | <u>Weekday Fee</u> | <u>Weekend Fee</u> |
|-------------------------------|---------------|--------------------|--------------------|
| a. Aluminum Canoes: | _____ | \$ _____ | \$ _____ |
| b. Fiberglass-Plastic Canoes: | _____ | \$ _____ | \$ _____ |
| c. One-man Kayaks: | _____ | \$ _____ | \$ _____ |
| d. Two-man Kayaks: | _____ | \$ _____ | \$ _____ |
| e. Rafts: | _____ | \$ _____ | \$ _____ |
| f. Rowboats: | _____ | \$ _____ | \$ _____ |
| g. Other (specify): | _____ | \$ _____ | \$ _____ |

4. a. How many total acres do you have at this site? _____ acres

- b. Does this include any undeveloped acreage that you could use to expand this livery?

_____ Yes: About how many acres? _____ acres

_____ No

5. Types of services and facilities provided at this site (check all that apply):

- ☐ return transportation for boats
☐ return transportation for boaters
☐ guided boat trips
☐ canoe sales
☐ kayak sales
☐ campground [Complete campground survey form if the campground is accessible by automobile.]
☐ lean-to sites, number: _____
☐ rental cabins/cottages, number: _____ [Complete hotel/motel survey form if appropriate.]
☐ rental tents, number: _____
☐ short order food sales
☐ retail store
☐ other (please explain: _____)

6. Does this livery border the Delaware River?

- ☐ No
☐ Yes; approximate frontage: _____ feet

IF YES: Are any of the following available? (Check all that are available.)

- ☐ canoe and boat launching
☐ fishing along the shore
☐ river wading or swimming

IF NO: Where do you usually send customers who seek access to the river?

- ☐ public access (where? _____)
☐ commercial (where? _____)

7. What are your opening and closing dates for this year?

opening date _____

closing date _____

8. Last year (1979) about what percent of your canoe rentals were for:

day use (not overnight) _____percent

2 days (1 night) _____percent

3 days (2 nights) _____percent

4 days (3 nights) _____percent

5 or more days _____percent

Total 100 percent

9. Approximately what percent of your 1979 customers visited you for the first time in 1979?

_____percent

10. How did you advertise your livery this year? (Check all that apply.)

_____mail brochures

_____newspaper ads (name of cities: _____)

_____magazine ads

_____radio (name of cities: _____)

_____television (name of cities: _____)

_____county or state tourism guide

_____other (please explain: _____)

11. Do you accept advance reservations for canoes or other boats?

_____No, first-come first-serve basis

_____Yes

IF YES: What percent of your parties reserve in advance?

canoes, _____percent

kayaks, _____percent

12. Please estimate your labor force in 1980:

| | Total Number of Employees | Total Person-weeks Full-time (40 hrs.) | Total Person-weeks Part-time (20 hrs. or more) | Total Person-weeks Part-time (Less than 20 hrs.) |
|-------------------------------------|------------------------------|-------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------|
| Owner/Co-owner | _____ | _____ | _____ | _____ |
| Family members | _____ | _____ | _____ | _____ |
| Hired help (local residents) | _____ | _____ | _____ | _____ |
| Hired help (non-local residents) | _____ | _____ | _____ | _____ |
| Total | _____ | _____ | _____ | _____ |

Boating Use and Occupancy

13. Roughly what percent of your boating customers come from the following areas:

| <u>Local/Regional</u> | <u>Percent</u> |
|--------------------------------------------------------------------------------------|----------------|
| New York: Sullivan - Delaware - Orange Counties | _____ |
| Pennsylvania: Pike - Wayne Counties | _____ |
| <u>Other</u> | |
| Metropolitan New York City (includes Long Island, NE New Jersey, Westchester Co.) | _____ |
| Binghamton area | _____ |
| Other upstate New York | _____ |
| Other Pennsylvania | _____ |
| Other states | _____ |
| TOTAL | 100% |

14. Of your total number of canoes or other boats, approximately how many were rented per day, on average, during the following periods:

| | | <u>Weekdays</u> | <u>Weekends</u> |
|----------------------|--------------------------|-----------------|----------------------|
| May 1-15 | [May 1 4-8 11-15] | | [May 2-3 9-10] |
| | | | |
| Memorial Day weekend | | N/A | [May 23-25] |
| May 16-31 | [May 18-22 26-29] | | [May 16-17 30-31] |
| | | | |
| June 1-15 | [June 1-5 8-12 15] | | [June 6-7 13-14] |
| | | | |

Management Concerns

15. Considering both economic and environmental factors, would you like to see more tourists, fewer tourists, or about the same number of tourists in the Upper Delaware area in the coming year, compared to the past year? (Check one column for each time period.)

| <u>Time Period</u> | <u>Relative Number of Tourists</u> | | |
|--------------------|------------------------------------|--------------|-----------------------|
| | <u>More</u> | <u>Fewer</u> | <u>About the Same</u> |
| April-May | _____ | _____ | _____ |
| June | _____ | _____ | _____ |
| July-August | _____ | _____ | _____ |
| September-October | _____ | _____ | _____ |

16. a) Do you have any particular concerns at this time about how the Upper Delaware River is being managed?

- b) Are there any positive aspects that you can identify at this time about how the Upper Delaware River area is being managed?

Please use this space for any additional comments:

APPENDIX B

1980 HOTEL-MOTEL SURVEY INTERVIEW FORM
FOR THE UPPER DELAWARE RIVER STUDY

CONFIDENTIAL1980 HOTEL-MOTEL SURVEY
UPPER DELAWARE RIVER STUDY

Name of Business: _____

Name of Owner/Manager: _____

Mailing Address: _____

Telephone Number: _____

Business Characteristics

1. How many years has this business been established (including 1980 season)?

_____ years

2. How many years has the business been under its current management
-
- (including 1980 season)? _____ years

3. Number of units and daily fee:

| | <u>Number</u> | <u>Rate</u> <u>1 Person</u> | <u>Rate</u> <u>2 Persons</u> |
|---------------------------|---------------|--------------------------------|---------------------------------|
| single rooms (1 bed) | _____ | \$ _____ | \$ _____ |
| double rooms (2 beds) | _____ | \$ _____ | \$ _____ |
| cabins | _____ | \$ _____ | \$ _____ |
| other lodging facilities: | | | |
| (specify: _____) | _____ | \$ _____ | \$ _____ |

4. a) How many total acres do you have at this site? _____ acres

- b) Do you have sufficient space to expand your number of rooms?

_____ Yes _____ No

5. Services provided at this site (Check all that apply.)

- ☐ restaurant
☐ bar
☐ swimming pool
☐ retail store (e.g., souvenirs, newstand, snacks, others)
☐ package plan which includes lodging and boating/canoeing
☐ campground [complete campground form]
☐ boat livery [complete boat livery form]
☐ other (please explain: _____)

6. Does this hotel/motel border the Delaware River?

- ☐ No
☐ Yes; approximate frontage: _____ feet

IF YES: Are any of the following available? (Check all that are available.)

- ☐ canoe and boat launching
☐ fishing along the shore
☐ river wading or swimming

IF NO: Where do you usually send customers who seek access to the river?

- ☐ public access (where? _____)
☐ commercial (where? _____)

7. What are your opening and closing dates for this year?

opening date _____
 closing date _____

8. Last year (1979) approximately what percent of your room rentals were for:

1 night only _____ percent

2 nights _____ percent

3 nights _____ percent

4 or more nights _____ percent

Total 100 percent

9. Approximately what percent of your 1979 customers visited you for the first time in 1979?

_____ percent

10. How did you advertise your hotel/motel this year? (Check all that apply.)

_____ mail brochures

_____ newspaper ads (name of cities: _____)

_____ magazine ads

_____ radio (name of cities: _____)

_____ television (name of cities: _____)

_____ county or state tourism guide

_____ other (please explain: _____)

11. Which of your facilities are available for non-motel guests?

_____ none _____ souvenir shop/retail store

_____ restaurant _____ boat launch

_____ bar _____ other (please specify: _____)

_____ swimming pool _____)

12. Do you accept reservations for rooms?

_____ No, first-come first-serve basis

_____ Yes

IF YES: What percent of your parties reserve in advance?

_____ weekend percent

_____ weekday percent

13. Please estimate your labor force in 1980:

| | Total Number of Employees | Total Person-weeks Full-time (40 hrs.) | Total Person-weeks Part-time (20 hrs. or more) | Total Person-weeks Part-time (Less than 20 hrs.) |
|-------------------------------------|---------------------------------|-------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------|
| Owner/Co-owner | _____ | _____ | _____ | _____ |
| Family members | _____ | _____ | _____ | _____ |
| Hired help (local residents) | _____ | _____ | _____ | _____ |
| Hired help (non-local residents) | _____ | _____ | _____ | _____ |
| Total | _____ | _____ | _____ | _____ |

Hotel Use and Occupancy

14. Roughly what percent of your customers come from the following areas:

| <u>Local/Regional</u> | <u>Percent</u> |
|------------------------------------------------------------------------------------------------------|----------------|
| New York: Sullivan - Delaware - Orange Counties | _____ |
| Pennsylvania: Pike - Wayne Counties | _____ |
| <u>Other</u> Metropolitan New York City (includes Long Island, NE New Jersey, Westchester Co.) | _____ |
| Binghamton area | _____ |
| Other upstate New York | _____ |
| Other Pennsylvania | _____ |
| Other states | _____ |

TOTAL

100%

15. Of your total number of rooms, approximately how many were rented per day, on average, during the following periods:

| | | <u>Weekdays</u> | <u>Weekends</u> |
|----------------------|--------------------------|-----------------|----------------------------|
| May 1-15 | [May 1 4-8 11-15] | _____ | [May 2-3 9-10] _____ |
| Memorial Day weekend | | N/A | [May 23-25] _____ |
| May 16-31 | [May 18-22 26-29] | _____ | [May 16-17 30-31] _____ |
| June 1-15 | [June 1-5 8-12 15] | _____ | [June 6-7 13-14] _____ |

Management Concerns

16. Considering both economic and environmental factors, would you like to see more tourists, fewer tourists, or about the same number of tourists in the Upper Delaware area in the coming year, compared to the past year? (Check one column for each time period.)

| <u>Time Period</u> | <u>Relative Number of Tourists</u> | | |
|--------------------|------------------------------------|--------------|-----------------------|
| | <u>More</u> | <u>Fewer</u> | <u>About the Same</u> |
| April-May | _____ | _____ | _____ |
| June | _____ | _____ | _____ |
| July-August | _____ | _____ | _____ |
| September-October | _____ | _____ | _____ |

17. a) Do you have any particular concerns at this time about how the Upper Delaware River is being managed?

- b) Are there any positive aspects that you can identify at this time about how the Upper Delaware River area is being managed?

Please use this space for any additional comments:

APPENDIX C

1980 CAMPGROUND SURVEY INTERVIEW FORM
FOR THE UPPER DELAWARE RIVER STUDY

CONFIDENTIAL1980 CAMPGROUND SURVEY
UPPER DELAWARE RIVER STUDY

Name of Campground: _____

Name of Owner/Manager: _____

Mailing Address: _____

Telephone Number: _____

Characteristics of Campground Business

1. How many years has this campground been in business (including 1980 season)? _____ years
2. How many years has this campground been under its current management (including 1980 season)? _____ years
3. Number of campsites available and daily campsite fees at this campground:
 - a) Number of tent, trailer and recreational vehicle sites and daily fees:

| | <u>Tent Only</u> | | <u>Trailer and Recreational Vehicle</u> | | <u>Total Number</u> |
|-----------------------------------------|------------------|------------|-------------------------------------------------|------------|-------------------------|
| | <u>Number</u> | <u>Fee</u> | <u>Number</u> | <u>Fee</u> | |
| with electric, water & sewer hookups | N/A | N/A | _____ | \$ _____ | _____ |
| with electric and water hookups | N/A | N/A | _____ | \$ _____ | _____ |
| with electric hookups | _____ | \$ _____ | _____ | \$ _____ | _____ |
| with no hookups | _____ | \$ _____ | _____ | \$ _____ | _____ |
| other (specify): _____ | _____ | \$ _____ | _____ | \$ _____ | _____ |

- b) Number of separate lean-to shelters: _____

daily use fee: \$ _____

- c) Number of camping units that can be accommodated on an undeveloped or overflow area: _____

daily use fee: \$ _____

4. a) How many total acres do you have at this site? _____ acres
- b) Does this include any undeveloped acreage that you could use to expand your campground?

_____ Yes _____ No

IF YES: Approximately how many acres are available for campsite expansion?

_____ acres

5. Type of facilities and services available at the campground:

I. Facilities

_____ showers, number: _____

_____ flush toilets, number: _____

_____ dumping station

_____ laundry, number: _____ washers; _____ dryers

_____ playground

_____ recreation hall/pavilion

_____ swimming pool

_____ store

_____ other (please explain: _____)

II. Services

_____ sale of gasoline

_____ propane gas

_____ horseback riding, number of horses: _____

_____ other (please explain: _____)

III. Rentals

_____ canoe, kayak, or raft rentals [also complete a boat livery interview form]

_____ other boat rentals, number of boats: _____ [also complete a boat livery interview form]

_____ rental tents, number: _____

_____ rental trailers, number: _____

_____ rental cabins or cottages, number: _____

_____ other (please explain: _____)

6. Does this campground border the Delaware River?

_____ No

_____ Yes; approximate frontage: _____ feet

IF YES: Which of the following are available? (check all that apply)

_____ canoe or boat launching

_____ fishing along the shore

_____ river wading or swimming

IF NO: Where do you usually send customers who seek access to the river?

_____ public access (where? _____)

_____ commercial (where? _____)

Business Operations

7. What are your opening and closing dates for this year?

opening date _____

closing date _____

8. Approximately how many seasonal sites have you rented for 1980?

_____ sites

9. Last year (1979) about what percent of your non-seasonal campers stayed:

overnight only _____ percent

2 nights _____ percent

3 nights _____ percent

4 to 6 nights _____ percent

7 to 14 nights _____ percent

more than 14 nights _____ percent

Total 100 percent

10. Approximately what percent of your 1979 camping parties stayed with you for the first time in 1979?

_____ percent new customers in 1979

11. Which of your facilities are available for day-users (non-campers)?

| | |
|----------------------------|----------------------------------------------|
| <u> </u> none | <u> </u> recreation hall/pavilion |
| <u> </u> picnicking | <u> </u> horseback riding |
| <u> </u> store | <u> </u> laundry facilities |
| <u> </u> playground | <u> </u> boating/canoeing |
| <u> </u> swimming | <u> </u> other (please specify:_____) |

12. How did you advertise your campground business this year? (Check all that apply.)

_____ mail brochures

_____ newspaper ads (name of cities: _____)

_____ magazine ads

_____ radio (name of cities: _____)

_____ television (name of cities: _____)

_____ campground guides

_____ county or state tourism guide

_____ other (please explain: _____)

13. Do you accept advance reservations for camping sites?

 No, first-come first-serve basis

 Yes

IF YES: What percent of your summer campers reserve a site in advance?

_____ weekend percent
_____ weekday percent

14. Please estimate your labor force in 1980:

| | <u>Total Number of Employees</u> | <u>Total Person-weeks Full-time (40 hrs.)</u> | <u>Total Person-weeks Part-time (20 hrs. or more)</u> | <u>Total Person-weeks Part-time (Less than 20 hrs.)</u> |
|-------------------------------------|--------------------------------------|-----------------------------------------------------------|-------------------------------------------------------------------|---------------------------------------------------------------------|
| Owner/Co-owner | _____ | _____ | _____ | _____ |
| Family members | _____ | _____ | _____ | _____ |
| Hired help (local residents) | _____ | _____ | _____ | _____ |
| Hired help (non-local residents) | _____ | _____ | _____ | _____ |
| Total | _____ | _____ | _____ | _____ |

Campground Use and Occupancy

15. Roughly what percent of your campers come from the following areas:

| <u>Local/Regional</u> | <u>Percent</u> |
|--------------------------------------------------------------------------------------|----------------|
| New York: Sullivan - Delaware - Orange Counties | _____ |
| Pennsylvania: Pike - Wayne Counties | _____ |
| <u>Other</u> | |
| Metropolitan New York City (includes Long Island, NE New Jersey, Westchester Co.) | _____ |
| Binghamton area | _____ |
| Other upstate New York | _____ |
| Other Pennsylvania | _____ |
| Other states | _____ |
| | _____ |
| TOTAL | 100% |

16. Of your total number of sites, including overflow, approximately how many were rented per night, on average, during the following periods:

| | | <u>Weekdays</u> | | <u>Weekends</u> |
|----------------------|----------------------------|-----------------|------------------------|-----------------|
| May 1-15 | [May 1 4-8 11-15] | _____ | [May 2-3 9-10] | _____ |
| Memorial Day weekend | | N/A | [May 23-25] | _____ |
| May 16-31 | [May 18-22 26-29] | _____ | [May 16-17 30-31] | _____ |
| June 1-15 | [June 1-5 8-12 15] | _____ | [June 6-7 13-14] | _____ |

Management Concerns

17. Considering both economic and environmental factors, would you like to see more tourists, fewer tourists, or about the same number of tourists in the Upper Delaware area in the coming year, compared to the past year? (Check one column for each time period.)

| <u>Time Period</u> | <u>Relative Number of Tourists</u> | | |
|--------------------|------------------------------------|--------------|-----------------------|
| | <u>More</u> | <u>Fewer</u> | <u>About the Same</u> |
| April-May | _____ | _____ | _____ |
| June | _____ | _____ | _____ |
| July-August | _____ | _____ | _____ |
| September-October | _____ | _____ | _____ |

18. a) Do you have any particular concerns at this time about how the Upper Delaware River is being managed?

- b) Are there any positive aspects that you can identify at this time about how the Upper Delaware River area is being managed?

Please use this space for any additional comments:

APPENDIX D

1980 BOAT LIVERY MAIL SURVEY FOLLOWUP FORM
FOR THE UPPER DELAWARE RIVER STUDY

1980 BOAT LIVERY SURVEY - Followup
UPPER DELAWARE RIVER STUDY

Name of Business _____

1. In 1980, compared to 1979, did you see any difference in the average length of time canoes were rented for?

_____ YES _____ NO

If YES, please explain: _____

2. Approximately what per cent of your 1980 customers visited you for the first time in 1980?

_____ per cent

How did this compare with 1979? (Check one):

_____ about the same

_____ more new customers in 1980

_____ more repeat business in 1980

3. Approximately how many total canoes, kayaks, and other boats were rented per day, on average, during the following periods:

| | <u>Average Daily Number of Boats Rented</u> | |
|-------------------|---------------------------------------------|-----------------|
| | <u>Weekdays</u> | <u>Weekends</u> |
| June 15 - June 30 | _____ | _____ |
| July | _____ | _____ |
| August | _____ | _____ |
| Labor Day Weekend | XXXX | _____ |
| September 2-15 | _____ | _____ |

4. How did your total number of boats rented to date in 1980 compare with the same period in 1979?

Up _____ per cent

Down _____ per cent

_____ No change

5. Of your total gross receipts during calendar year 1979, roughly what per cent did you receive each quarter?

| <u>Quarter</u> | <u>Percent of Annual Receipts</u> |
|-------------------------|-----------------------------------|
| January 1 - March 31 | _____ % |
| April 1 - June 30 | _____ % |
| July 1 - September 30 | _____ % |
| October 1 - December 31 | _____ % |
| | 100% |

6. What change, if any, did you observe in the availability of law enforcement assistance in 1980, compared to 1979?

_____ no change

_____ more law enforcement assistance available

_____ less law enforcement assistance available

- 6b. If you observed a change in the availability of law enforcement assistance in 1980, what do you feel were the effects of this change?

7. How did the amount of littering along the river in 1980 compare with 1979?

_____ about the same

_____ more littering

_____ less littering

8. Do you plan any expansion of your business in 1981?

_____ YES _____ NO

If YES, please indicate how many boats or other facilities you plan to add _____

9. Do you feel canoe and boat crowding is a problem on the Upper Delaware during high use periods?

_____ No

_____ Yes

If Yes, explain the problem and suggest what might be done about it: _____

10. Do you have any suggestions on how the National Park Service or other concerned agencies or organizations can provide more information or programs on boating safety on the Upper Delaware?

_____ No

_____ Yes

If Yes, please explain: _____

Please use this space for any additional comments or suggestions you wish to make:

APPENDIX E

1980 HOTEL-MOTEL MAIL SURVEY FOLLOWUP FORM
FOR THE UPPER DELAWARE RIVER STUDY

1980 HOTEL-MOTEL SURVEY - Followup

UPPER DELAWARE RIVER STUDY

Name of Business _____

1. In 1980, did you see any change from 1979 in the average length of stay of your customers? (Check one below)

_____ no change

_____ longer average length of stay

_____ shorter average length of stay

If you indicated a change in average length of stay, to what do you attribute the change? _____

2. Approximately what percent of your 1980 customer parties stayed with you for the first time in 1980?

_____ per cent new customers in 1980

How did this compare with 1979? (Check one):

_____ about the same

_____ more new customers in 1980

_____ more repeat business in 1980

3. Approximately how many rooms were rented per night, on average, during the following periods in 1980?

| | <u>Average Number of Rooms Rented</u> | |
|-------------------|---------------------------------------|-----------------|
| | <u>Weekdays</u> | <u>Weekends</u> |
| June 15 - June 30 | _____ | _____ |
| July | _____ | _____ |
| August | _____ | _____ |
| Labor Day Weekend | XXX | _____ |
| September 2-15 | _____ | _____ |

4. How did your total occupancy (total number of rooms rented) in 1980 compare with 1979?

Up _____ per cent

Down _____ per cent

_____ No change

5. Of your total gross receipts during calendar year 1979, roughly what per cent did you receive each quarter?

| <u>Quarter</u> | <u>Percent of Annual Receipts</u> |
|-------------------------|-----------------------------------|
| January 1 - March 31 | _____ % |
| April 1 - June 30 | _____ % |
| July 1 - September 30 | _____ % |
| October 1 - December 31 | _____ % |
| | _____ 100% |

If your business was closed from October 1 through December 31, 1979, Skip to Question 7.

6. We would like to gain some idea of your clientele during the last quarter (October 1 through December 31) of 1979. Please rank the following groups according to their contribution to your business during the fourth quarter. Place a "1" beside your largest clientele, a "2" beside your second largest, etc. Rank only those groups which provided at least 10 per cent of your business for the fourth quarter of 1979; leave the space beside other groups blank.

| <u>Rank</u> | <u>Group</u> |
|-------------|-------------------------------------------------------|
| _____ | Sightseers (e.g., to view fall colors, scenery, etc.) |
| _____ | Small game hunters |
| _____ | Big game hunters |
| _____ | Fishermen |
| _____ | Enroute travelers |
| _____ | Other (Specify) _____ |

- 7a. What change, if any, did you observe in the availability of law enforcement assistance in 1980, compared to 1979?

_____ no change

_____ more law enforcement assistance available

_____ less law enforcement assistance available

- 7b. If you observed a change in the availability of law enforcement assistance in 1980, what do you feel were the effects of this change?

8. Do you plan any expansion of your business in 1981?

_____ YES _____ NO

If YES, please indicate how many rooms or other facilities you plan to add _____

Please use this space for any additional comments or suggestions you wish to make:

APPENDIX F

1980 CAMPGROUND MAIL SURVEY FOLLOWUP FORM
FOR THE UPPER DELAWARE RIVER STUDY

1980 CAMPGROUND SURVEY - Followup

UPPER DELAWARE RIVER STUDY

Name of Campground _____

1. In 1980, did you see any change from 1979 in the average length of stay of your campers? (Check one below)

_____ no change

_____ longer average length of stay

_____ shorter average length of stay

If you indicated a change in average length of stay, to what do you attribute the change? _____

2. Approximately what percent of your 1980 camping parties stayed with you for the first time in 1980?

_____ per cent new customers in 1980

How did this compare with 1979? (Check one):

_____ about the same

_____ more new customers in 1980

_____ more repeat business in 1980

3. Approximately how many total sites, including overflow, were rented per night, on average, during the following periods in 1980?

| | Average Number of Sites Rented | |
|-------------------|--------------------------------|-----------------|
| | <u>Weekdays</u> | <u>Weekends</u> |
| June 15 - June 30 | _____ | _____ |
| July | _____ | _____ |
| August | _____ | _____ |
| Labor Day Weekend | XXX | _____ |
| September 2-15 | _____ | _____ |

4. How did your total occupancy (total number of sites rented) in 1980 compare with 1979?

Up _____ per cent

Down _____ per cent

_____ No change

5. Of your total gross receipts during calendar year 1979, roughly what per cent did you receive each quarter?

| <u>Quarter</u> | <u>Percent of Annual Receipts</u> |
|-------------------------|-----------------------------------|
| January 1 - March 31 | _____ % |
| April 1 - June 30 | _____ % |
| July 1 - September 30 | _____ % |
| October 1 - December 31 | _____ % |
| | _____ 100% |

If your business was closed from October 1 through December 31, 1979, Skip to Question 7.

6. We would like to gain some idea of your clientele during the last quarter (October 1 through December 31) of 1979. Please rank the following groups according to their contribution to your business during the fourth quarter. Place a "1" beside your largest clientele, a "2" beside your second largest, etc. Rank only those groups which provided at least 10 per cent of your business for the fourth quarter of 1979; leave the space beside other groups blank.

| <u>Rank</u> | <u>Group</u> |
|-------------|-------------------------------------------------------|
| _____ | Sightseers (e.g., to view fall colors, scenery, etc.) |
| _____ | Small game hunters |
| _____ | Big game hunters |
| _____ | Fishermen |
| _____ | Enroute travelers |
| _____ | Other (Specify) _____ |

- 7a. What change, if any, did you observe in the availability of law enforcement assistance in 1980, compared to 1979?

_____ no change

_____ more law enforcement assistance available

_____ less law enforcement assistance available

- 7b. If you observed a change in the availability of law enforcement assistance in 1980, what do you feel were the effects of this change?

8. Do you plan any expansion of your business in 1981?

_____ YES _____ NO

If YES, please indicate how many sites or other facilities you plan to add _____

Please use this space for any additional comments or suggestions you wish to make:

APPENDIX GSupplementary TablesTable No.

- | | |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------|
| G-1 | YEARS IN BUSINESS AND YEARS UNDER CURRENT MANAGEMENT FOR THE THREE TYPES OF RECREATION SERVICE FIRMS IN THE UPPER DELAWARE RIVER VALLEY |
| G-2 | ACREAGE OF RECREATIONAL SITES DEVELOPED AND UNDEVELOPED |
| G-3 | UPPER DELAWARE RIVER FRONTAGE AT RECREATIONAL BUSINESS SITES |
| G-4 | AVERAGE WEEKDAY AND WEEKEND HOTEL-MOTEL OCCUPANCY BETWEEN 1 MAY AND 15 SEPTEMBER 1980 |
| G-5 | AVERAGE WEEKDAY AND WEEKEND CAMPGROUND OCCUPANCY BETWEEN 1 MAY AND 15 SEPTEMBER 1980 |
| G-6 | AVERAGE WEEKDAY AND WEEKEND WATERCRAFT RENTALS BETWEEN 1 MAY AND 15 SEPTEMBER 1980 |

TABLE G-1. YEARS IN BUSINESS AND YEARS UNDER CURRENT MANAGEMENT FOR THE THREE TYPES OF RECREATION SERVICE FIRMS IN THE UPPER DELAWARE RIVER VALLEY (SITE ANALYSIS)

| Years | Site Types | | | | | |
|-----------------|-------------|--------------|-------------|--------------|-----------------|-----------------|
| | Hotel-Motel | | Campgrounds | | Boat Livery | |
| | In Business | Current Mgmt | In Business | Current Mgmt | In Business | Current Mgmt |
| | Percent | | | | | |
| 1-5 | 12.4 | 18.7 | 9.1 | 27.2 | 18.2 | 41.0 |
| 6-10 | 0.0 | 18.7 | 36.4 | 36.4 | 50.1 | 41.0 |
| 11-15 | 12.4 | 25.0 | 54.5 | 36.4 | 18.2 | 9.0 |
| 16-25 | 12.4 | 12.6 | 0.0 | 0.0 | 4.5 | 4.5 |
| 26-50 | 31.4 | 18.7 | 0.0 | 0.0 | 4.5 | 4.5 |
| >50 | 31.4 | 6.3 | 0.0 | 0.0 | 4.5 | 0.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Number of Sites | 16 | 16 | 11 | 11 | 22 ^a | 22 ^a |

^a2 missing cases; i.e., data not available for 2 boat livery sites.

TABLE G-2. ACREAGE OF RECREATIONAL BUSINESS SITES DEVELOPED AND UNDEVELOPED
(SITE ANALYSIS)

| Acres | Site Types | | | | | |
|---------|-------------------|----------------------------------|-------------------|---------------------|-------------------|---------------------|
| | Hotel-Motel | | Campgrounds | | Boat Livery | |
| | Developed Site | Undeveloped Area ^a | Developed Site | Undeveloped Area | Developed Site | Undeveloped Area |
| Percent | | | | | | |
| 0 | - | N.A. | - | 11.1 | - | 35.2 |
| 1-5 | 62.5 | N.A. | 18.2 | 33.4 | 52.4 | 41.2 |
| 6-10 | 12.5 | N.A. | 9.1 | 22.2 | 10.5 | 11.8 |
| 11-15 | 12.5 | N.A. | 9.1 | 0.0 | 0.0 | 0.0 |
| 16-25 | 0.0 | N.A. | 18.2 | 22.2 | 21.2 | 0.0 |
| 26-50 | 0.0 | N.A. | 9.1 | 11.1 | 5.3 | 5.9 |
| 51-100 | 0.0 | N.A. | 27.2 | 0.0 | 5.3 | 5.9 |
| >100 | 12.5 | N.A. | 9.1 | 0.0 | 5.3 | 0.0 |
| Total | 100.0 | N.A. | 100.0 | 100.0 | 100.0 | 100.0 |
| N | 16 | | 11 | 9 ^b | 19 ^c | 17 ^d |

^aUndeveloped land at the site location was not ascertained for Hotel-Motel sites because it would have little relevance to potential expansion possibilities.

^b2 missing cases (sites)

^c5 missing cases (sites)

^d7 missing cases (sites)

TABLE G-3. UPPER DELAWARE RIVER FRONTAGE AT RECREATIONAL BUSINESS SITES
(SITE ANALYSIS)

| Feet of River Frontage | Site Type | | |
|------------------------|-------------|----------------|-----------------|
| | Hotel-Motel | Campground | Boat Livery |
| | Percent | | |
| 0 | 87.4 | 22.2 | 22.2 |
| 1-500 | 0.0 | 11.1 | 37.4 |
| 501-1000 | 6.3 | 11.1 | 11.2 |
| 1001-2000 | 0.0 | 11.1 | 5.6 |
| 2001-3000 | 0.0 | 11.1 | 5.6 |
| 3001-4000 | 0.0 | 22.2 | 11.2 |
| 4001-5000 | 0.0 | 0.0 | 0.0 |
| >5000 | 6.3 | 11.1 | 5.6 |
| Total | 100.0 | 99.9 | 100.0 |
| N | 16 | 9 ^a | 18 ^b |

^a2 missing cases.^b6 missing cases.

TABLE G-4. AVERAGE WEEKDAY AND WEEKEND HOTEL-MOTEL OCCUPANCY BETWEEN
1 MAY AND 15 SEPTEMBER 1980 (HOTEL-MOTEL BUSINESS ANALYSIS)

| Period | | Total # of Units Available at Hotels-Motels Reporting | Percent Occupancy | Number of Hotels-Motels Reporting |
|----------------------|---------|----------------------------------------------------------------|----------------------|-----------------------------------------|
| May 1-15 | weekday | 335 | 5.7 | 15 |
| | weekend | 335 | 56.1 | 15 |
| Memorial Day weekend | | 335 | 88.1 | 15 |
| May 16-31 | weekday | 335 | 20.0 | 15 |
| | weekend | 335 | 45.7 | 15 |
| June 1-15 | weekday | 335 | 28.1 | 15 |
| | weekend | 335 | 66.9 | 15 |
| June 16-30 | weekday | 310 | 37.7 | 13 |
| | weekend | 310 | 64.8 | 13 |
| July | weekday | 310 | 65.8 | 13 |
| | weekend | 310 | 83.5 | 13 |
| August | weekday | 310 | 62.9 | 13 |
| | weekend | 310 | 83.2 | 13 |
| Labor Day weekend | | 310 | 82.6 | 13 |
| Sept 2-15 | weekday | 310 | 31.6 | 13 |
| | weekend | 310 | 55.5 | 13 |

TABLE G-5. AVERAGE WEEKDAY AND WEEKEND CAMPGROUND OCCUPANCY BETWEEN
1 MAY AND 15 SEPTEMBER 1980 (CAMPGROUND BUSINESS ANALYSIS)

| Period | | Number of Campsites Available at Camp- grounds Reporting | Percent Occupancy | Total Number of Campground Businesses Reporting |
|----------------------|---------|----------------------------------------------------------------|----------------------|----------------------------------------------------------|
| May 1-15 | weekday | 873 | 2.9 | 9 |
| | weekend | 873 | 46.0 | 9 |
| Memorial Day weekend | | 873 | 70.4 | 9 |
| May 16-31 | weekday | 873 | 5.0 | 9 |
| | weekend | 873 | 67.4 | 9 |
| June 1-15 | weekday | 873 | 6.5 | 9 |
| | weekend | 873 | 55.9 | 9 |
| June 16-30 | weekday | 789 | 11.7 | 6 |
| | weekend | 789 | 59.9 | 6 |
| July | weekday | 789 | 25.0 | 6 |
| | weekend | 789 | 72.6 | 6 |
| August | weekday | 789 | 25.6 | 6 |
| | weekend | 789 | 72.6 | 6 |
| Labor Day weekend | | 789 | 68.4 | 6 |
| Sept 2-15 | weekday | 789 | 2.3 | 6 |
| | weekend | 789 | 34.0 | 6 |

TABLE G-6. AVERAGE WEEKDAY AND WEEKEND WATERCRAFT RENTALS BETWEEN
1 MAY AND 15 SEPTEMBER 1980 (BOAT LIVERY BUSINESS ANALYSIS)

| Period | | Number of Watercraft Available at Boat Liveries Reporting | Percent Rented | Number of Boat Livery Businesses Reporting |
|----------------------|---------|-----------------------------------------------------------------|-------------------|-----------------------------------------------------|
| May 1-15 | weekday | 3128 | 4.6 | 10 |
| | weekend | 3482 | 42.2 | 11 |
| Memorial Day weekend | | 3482 | 71.0 | 11 |
| May 16-31 | weekday | 3128 | 11.2 | 10 |
| | weekend | 3482 | 75.2 | 11 |
| June 1-15 | weekday | 3128 | 10.0 | 10 |
| | weekend | 3482 | 75.3 | 11 |
| June 16-30 | weekday | 3283 | 10.8 | 8 |
| | weekend | 3283 | 66.6 | 8 |
| July | weekday | 3283 | 8.4 | 8 |
| | weekend | 3283 | 52.0 | 8 |
| August | weekday | 3283 | 9.2 | 8 |
| | weekend | 3283 | 51.7 | 8 |
| Labor Day weekend | | 3283 | 43.9 | 8 |
| Sept 2-15 | weekday | 3283 | 6.3 | 8 |
| | weekend | 3283 | 19.9 | 8 |