



## Camping in the San Francisco Bay Area: A Survey of Facilities and Needs

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Public and private operators of campgrounds in the San Francisco Bay Area available to the general public were surveyed in early 1994 to determine whether there is a sufficient supply of campsites to accommodate demand. Key conclusions of the research include:

- o Over 2.9 million people use 76 campgrounds in the Bay Area each year.
- o The demand for campsites during the peak season from Memorial Day to Labor Day substantially exceeds supply. Nearly all of the camping facilities responding to the survey operated at capacity on weekends during the peak season.
- o Demand is sufficiently greater than supply that normally important factors such as location and amenities have little discernable impact on occupancy levels during the peak season (although hotter, inland campgrounds away from water have an earlier and shorter season).
- o The demand for more campsites is so strong that facility operators cannot accurately quantify how many more sites would be needed to meet demand. The comment of one operator is instructive: "No matter how many campsites were added (within reason) to the existing number, reservations would always fill the camp and there would always be some unmet demand on a drop-in basis for campsites during summer months" (Butano State Park survey response).
- o Approximately two-thirds of the 6,529 identified campsites are located in those Bay Area counties that are adjacent to the Pacific Ocean. The East Bay counties of Alameda and Contra Costa have by far the least number of campsites per resident (approximately one campsite per 6,000 residents, compared to a regional average of about one campsite per 850 residents for the nine-county Bay Area).
- o While the mix of residents and tourists using the camping facilities was not quantitatively surveyed, subjective information indicates high usage of coastal facilities by tourists from outside the region. Thus, the more favorable campsite-to-resident ratios for coastal counties do not necessarily mean local residents in those counties have an easier time finding available campsites.
- o Adding more campsites to existing facilities is not generally an option because campgrounds are often already as large as is considered appropriate for their locations. Increasing their capacity could have adverse environmental and experiential impacts.

Based on both objective and subjective responses to the survey, this report makes two major recommendations:

- o Based on strong demand by both residents and tourists for camping facilities in the San Francisco Bay Area, consideration should be given to methods for increasing the number of campgrounds without adversely impacting unique, sensitive or important habitats.
- o Development of a funding program to acquire open space lands for the express purpose of providing additional camping facilities should be pursued. It may be possible in some situations to develop new campgrounds within existing regional parks, but existing park usage levels and environmental considerations limit the ability of this approach to generate a sufficient number of new campsites to adequately satisfy pent-up demand.

## Research Methodology

Camping facilities were identified using published guidebooks and public agency informational materials. As much information as possible was obtained from these sources. This information was then supplemented by a mailed survey questionnaire, which was sent to all known campgrounds in the nine-county Bay Area plus Santa Cruz County. The survey was designed to determine the following information:

- o Correct name, address and ownership of each facility
- o Accessibility of sites (hike in? drive in?)
- o Capacity of facility
- o Amenities offered
- o Reservation policy
- o Fee schedule
- o Annual usage
- o Occupancy rates

Campgrounds were defined as facilities which had back-country sites, walk-in sites, car access sites, RV sites, and/or cabins. Mobile home parks were excluded, although some mobile home parks may offer short-term spaces to recreational vehicles. Also excluded were hostels and bed and breakfast facilities.

Summary data for the 76 identified camping facilities is shown in Table 1. The survey generated a 45 percent response rate (34 responses), which is excellent for this type of survey instrument. In terms of ownership, 71 percent of the survey respondents were public agencies, which 29 percent were private operators. This compares with an even 50 percent public ownership, 50 percent private ownership split for the 76 identified camping facilities. Thus, the survey has a bias toward the public sector.

## Analysis of Data

### Description of Campgrounds:

A total capacity of 6,529 campsites was identified. The number of campsites per campground ranged from a low of 5 sites to a high of 346 sites. Private campgrounds were substantially larger than public campgrounds, at an average of 106 sites per campground for private facilities compared to an average of 63 sites per campground for public facilities. A comparison of number of campsites per residents indicates a significantly smaller supply for the East Bay relative to other counties, and the disparity is projected to increase over time due to population growth (Table II). However, the more favorable campsite-per-resident ratios in the coastal counties do not necessarily mean residents in those counties have easier access to camping, since subjective evidence indicates much heavier usage by tourists at coastal campgrounds.

Table I: Number of Campgrounds and Sites

<u>County</u>	<u>Number of Campgrounds</u>	<u>Total Sites</u>	<u>Type of Campsite</u>			
			<u>RV only</u>	<u>Tent Only</u>	<u>RV or Tent</u>	<u>Cabins</u>
Alameda	3	159	12	14	133	0
Contra Costa	3	187	139	0	48	0
Marin	8	467	90	245	123	9
Napa	12	1,048	349	198	501	0
San Francisco	3	338	290	0	48	0
San Mateo	6	559	340	70	149	0
Santa Clara	6	388	196	132	60	0
Santa Cruz	6	897	332	12	517	36
Solano	6	378	186	15	177	0
Sonoma	<u>23</u>	<u>2,108</u>	<u>210</u>	<u>246</u>	<u>1,617</u>	<u>35</u>
Total	76	6,529	2,144	932	3,373	80

Only eight of the facilities were identified as having back country campsites designated for hikers, bicyclists or horseback riders. An additional two campgrounds have boat ramps for campers arriving in canoes or other boats.

A wide range of amenities are offered. Almost all of the campgrounds offer toilets, showers, pay phones, picnic tables and fireplaces. Facilities that cater to RV's must offer more amenities such as water and electric hookups and propane, and some offer video game rooms, small grocery stores, playgrounds, laundromats, etc. There seems to be little correlation between amenities and usage, which is consistent with other data showing strong unmet demand.

Fees vary depending on the season. In general, RV sites are more expensive than tent sites. The range extends from \$0 for a tent site (Point Reyes National Seashore) to \$30 nightly for an RV site with water, electricity and cable TV hookups (San Francisco North/Petaluma KOA). The average nightly fee is \$12-\$15 per vehicle.

#### Usage and Occupancy:

Usage and occupancy is difficult to quantify because of incomplete data, different ways of tracking usage, and the fact that some facilities allow or require reservations, while others operate on a casual drop-in basis. Most of the public facilities associated with the California State Park System require reservations through MISTIX (1-800-444-PARK), a centralized reservation system, from Memorial Day to Labor Day. Many of these can be booked 2 months in advance. Facilities which use MISTIX report that peak times such as Labor Day weekend are often fully reserved within a few days after the start of the advanced reservation period, although cancellations may result in sites ending up being vacant or being filled on a drop-in basis at the last minute.

The total number of people using campsites in the Bay area is estimated to exceed 2.9 million per year. Considering most campgrounds filled up during peak times, usage levels would be much higher if not for capacity constraints. The estimate of annual usage was done by determining the number of campsites represented by survey respondents who provided annual usage figures, dividing this number into the total reported annual usage to derive an average annual usage per campsite, and then multiplying this rate by the total number of campsites in the region.

Overall, campgrounds in the Bay Area are essentially full on weekends from approximately Memorial Day to approximately Labor Day. Nearly three-fourths of the survey answered that during the peak season their occupancy was in the highest occupancy category provided by the survey instrument (75% - 100% full). Reasons varied for the few respondents who indicated they did not need more spaces. For example, one was not primarily a campground, but rather a fairgrounds with an associated camping area. Usage does not seem to be determined by fees, amenities, type of sites, offered, or any other factor, with the exception that inland campsites without water have a very short peak season.

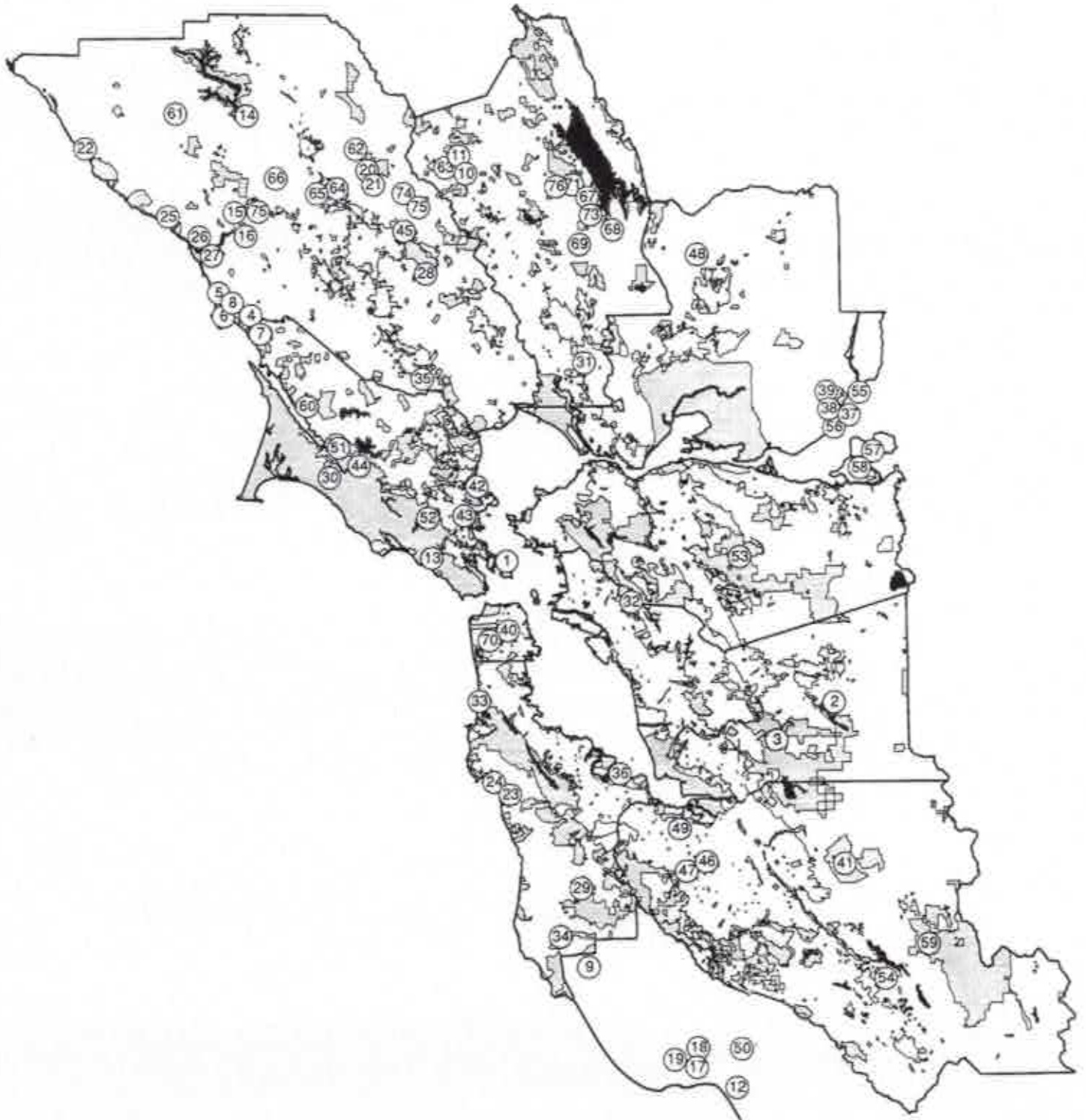
Many of the facilities say they would need anywhere from 20 to 200 more sites in order to meet demand during the busy season. For example, Half Moon Bay State Beach wrote that they would need 250 more sites, which represents a 490% increase, and Doran Regional Park in Bodega Bay claims to need 150-200 more sites, approximately a 125% increase.

Samuel Taylor State Park responded that "This area is in very short supply of quality campsites, largely because two of the major public land holders do not want to develop campgrounds. There is a major need for one night en-route camping along the 101 corridor for tourists."

In responding to the questionnaire about occupancy levels and whether they would need more spaces to accommodate demand, two different survey responders acknowledged strong demand for more campsites, but also warned about the hazards of trying to meet demand through the expansion of the existing campgrounds. Butano State Park stated that "Further development of the park would result in ecological degradation and in the diminution of the park experience for all visitors; therefore it is neither in the park's interest nor in the visitor's interest to increase the number of campsites currently available in the park. Similarly, Portola State Park commented that "We also need to consider park protection...we could easily double in size and [still] be full on weekends."

# Location of Campgrounds in the San Francisco Bay Area

(legend on following page)



## Map Legend: Campgrounds in the San Francisco Bay Area

Map ID #	Name of Campground	County	Total Sites
1	Angel Island State Park	San Francisco	48
2	Del Valle Park	Alameda	110
3	Sunol Regional Wilderness	Alameda	4
4	Bodega Bay RV Park	Sonoma	67
5	Doran Regional Park	Sonoma	138
6	Sonoma Coast St. Beach -	Sonoma	98
7	Sonoma Coast State Beach	Sonoma	30
8	Westside Regional Park	Sonoma	47
9	Big Basin Redwoods State	Santa Cruz	224
10	Bothe - Napa Valley State	Napa	50
11	Napa County Fairgrounds	Napa	50
12	New Brighton State Beach	Santa Cruz	115
13	Mt. Tamalpais State Park -	Marin	15
14	Cloverdale KOA	Sonoma	162
15	Austin Creek State	Sonoma	34
16	Casini Ranch Family	Sonoma	225
17	Cotillion Gardens RV Park	Santa Cruz	80
18	Henry Cowell Redwoods	Santa Cruz	112
19	Smithwoods Resort	Santa Cruz	150
20	Lake Sonoma Recreation	Sonoma	216
21	Liberty Glen Campground	Sonoma	110
22	Gualala Point - Sonoma	Sonoma	25
23	Half Moon Bay State Beach	San Mateo	51
24	Pelican Point RV Park	San Mateo	75
25	Fort Ross State Historic Park	Sonoma	20
26	Salt Point State Park	Sonoma	111
27	Stillwater Cove Regional	Sonoma	24
28	Sugarloaf Ridge State Park	Sonoma	50
29	Portola State Park	San Mateo	53
30	Point Reyes National	Marin	45
31	Outdoor Resorts of Napa	Napa	145
32	Anthony Chabot Regional	Alameda	45
33	Pacific Park RV Resort	San Mateo	260
34	Butano State Park	San Mateo	40
35	San Francisco North /	Sonoma	346
36	Trailer Villa	San Mateo	80
37	Brannan Island State	Solano	102
38	Delta Marina RV Park	Solano	25
39	Sandy Beach County Park	Solano	42
40	San Francisco RV Park	San Francisco	200
41	Joseph Grant County Park	Santa Clara	40
42	China Camp State Park	Marin	30
43	Marin RV Park	Marin	90
44	Samuel Taylor State Park	Marin	63
45	Spring Lake Regional Park	Sonoma	30
46	Sanborn - Skyline County	Santa Clara	48
47	Saratoga Springs Picnic &	Santa Clara	39
48	Neil's Vineyard RV Park	Solano	125
49	Mobiland Manor	Santa Clara	50
50	Carbonero Creek Trailer	Santa Cruz	114
51	Olema Ranch Campground	Marin	200
52	Mt. Tamalpais State Park -	Marin	16
53	Mt. Diablo State Park	Contra Costa	48
54	Parkway Lakes RV Park	Santa Clara	113
55	Duck Island RV Park	Solano	51

56	Eddie's Boat Harbor	Solano	33
57	Island Park	Contra Costa	59
58	Delta Resort	Contra Costa	80
59	Henry Coe State Park	Santa Clara	98
60	Tomales Bay State Park	Marin	5
61	Red Mountain Campground	Sonoma	9
62	Windsorland RV Park	Sonoma	55
63	Calistoga Ranch	Napa	144
64	Riverbend Campground	Sonoma	103
65	Burke's Resort	Sonoma	60
66	Schoolhouse Canyon	Sonoma	29
67	Putah Creek Park	Napa	130
68	Pleasure Cove Resort	Napa	105
69	Lake Solano County Park	Napa	50
70	New San Francisco Trailer	San Francisco	90
71	Lake Berryessa Marina	Napa	123
72	Steele Park Resort	Napa	22
73	Spanish Flat Resort	Napa	120
74	Lower Hunting Creek	Napa	5
75	Mirabel Trailer Park and	Sonoma	125
76	Rancho Monicello Resort	Napa	104



**Table II:  
Grouped Counties: # of people per site, 1990 vs. 2005**

