



Analysis to Assist with Pricing the New Recreation Pass

Task #2: Benchmarking

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Table of Contents

1. Introduction	5
1.1. Background	5
1.2. Purpose of the Benchmarking	5
2. Overview and Comparison of the U.S. and Canadian Systems	6
2.1. United States	6
2.1.1. Federal Duck Stamp Program	7
2.1.2. Corps of Engineers Annual Day-Use Pass	8
2.1.3. Golden Eagle Passport (GEP)	8
2.1.4. Golden Eagle Sticker	8
2.1.5. National Parks Pass	8
2.1.6. Golden Age Passport	9
2.1.7. Golden Access Passport	9
2.1.8. Trends in Pass Prices and Visitation	9
2.2. Canada	14
3. U.S. State Parks	17
4. Comparison of Eight Selected States	24
4.1. California	26
4.1.1. Holdings, Visitation, and Employment	26
4.1.2. Operating Budget	27
4.1.3. Passes	29
4.2. Florida	30
4.2.1. Holdings, Visitation, and Employment	30
4.2.2. Operating Budget	30
4.2.3. Passes	31
4.3. Massachusetts	32
4.3.1. Holdings and Visitation	32
4.3.2. Operating Budget	32
4.3.3. Passes	33
4.4. Oregon	34
4.4.1. Holdings, Visitation, and Employment	34
4.4.2. Operating Budget	34
4.4.3. Passes	35
4.5. Texas	36
4.5.1. Holdings, Visitation, and Employment	36
4.5.2. Operating Budget	36
4.5.3. Passes	37
4.6. Utah	38
4.6.1. Holdings and Visitation	38
4.6.2. Operating Budget	38
4.6.3. Passes	39
4.7. Virginia	39
4.7.1. Holdings and Visitation	39
4.7.2. Operating Budget	40
4.7.3. Passes	40
4.8. Wisconsin	41
4.8.1. Holdings and Visitation	41

4.8.2. Operating Budget	41
4.8.3. Passes	41
4.9. Some Lessons about Passes from These Eight States	42
4.9.1. Pricing Policies.....	42
4.9.2. Marketing.....	44
5. Other Recreation Passes.....	46
5.1. Regional Passes.....	46
5.1.1. Adventure Pass	46
5.1.2. Joint Rocky Mountain National Park and Arapaho National Recreation Area Pass	47
5.1.3. Northwest Forest Pass	47
5.1.4. Oregon-Washington Recreation Pass	47
5.1.5. Oregon Coastal Pass	48
5.1.6. Idaho VIP Pass	48
5.1.7. Red Rock Pass Program.....	48
5.1.8. Chattahoochee-Oconee National Forests Recreation Pass.....	48
5.1.9. Southwest Pennsylvania Park Pass	48
5.2. Annual Passes for Amusement Parks, Zoos, and Museums	48
6. Implications for Pricing the New Recreation Pass	50
7. References.....	51

List of Tables

Table 1. Golden Eagle Passport and National Parks Pass Prices, 1965–2006.....	10
Table 2. Approximate Golden Eagle Passport and National Parks Pass Sales, 1997–2005.....	10
Table 3. Approximate Golden Eagle Pass and National Parks Pass Revenue, 1997–2003.....	11
Table 4. Recreation Visits by Type of US-NPS Area, 2000–2005.....	12
Table 5. Golden Age Passport Sales	13
Table 6. Parks Canada Pass Prices.....	15
Table 7. Comparison of Annual Parks and Passes: U.S. and Canada	16
Table 8. Parks Canada Recreation Visits by Type of Area, FY 2001–2005	17
Table 9. State Park Total Acreage and Major Facilities (June 30, 2004).....	18
Table 10. State Parks’ Operating Budgets and Revenues (June 30, 2004).....	20
Table 11. Prices of State Annual Passes	22
Table 12. Annual State Park Visitation for Selected States, FY 2000–2004.....	25
Table 13. Annual State Park Visitation Rates for Selected States, FY 2000 and 2004	26
Table 14. Annual State Park Fee Revenues (Nominal) for Selected States, FY 2000–04.....	26
Table 15. Florida State Parks’ Revenue from Annual Pass Sales.....	32
Table 16. Massachusetts State Parks’ Revenue from Annual Pass Sales	32
Table 17. Oregon State Parks Revenue from User Fees.....	35
Table 18. Texas State Parks’ Revenue from Annual Pass Sales	37
Table 19. Utah State Parks’ Revenue, Expenses, and Visitor Fees, FY 2001–2005	39
Table 20. Virginia State Parks’ Expenditure and Revenue Comparison (FY 2001–2005).....	40
Table 21. Wisconsin Sticker and Trail Pass Fees, 2005.....	42
Table 22. Summary of Annual Park Passes Issued by Eight Selected States	43
Table 23. Pass Prices of Selected Amusement Parks.....	49
Table 24. Pass Prices of Some Major Zoos and Museums.....	49

List of Figures

Figure 1. FY 2004 Sources of Operating Funds	20
Figure 2. California State Parks’ Operating Budget for FY 2005	27
Figure 3. California State Parks and Recreation Fund Revenue Sources for FY 2005.....	28
Figure 4. Florida State Parks’ Expenditures for FY 2004–2005	31
Figure 5. Massachusetts State Parks’ Expenditures for FY 2005.....	33

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1. Introduction

This report is one part of a larger project undertaken by the Wyoming Survey & Analysis Center (WYSAC) and the Departments of Economics, Sociology, and Statistics at the University of Wyoming. The objective of the project is to assist the agencies that administer federal lands in pricing the new annual pass for recreation on federal lands that is scheduled to go on sale in 2007.

Information reported here is based largely on published and unpublished data obtained from the National Park Service and other agencies in the Department of the Interior, the U.S. Department of Agriculture's Forest Service, various state park offices, the National Association of State Park Directors, and their respective websites. We did not audit the information supplied to us by third-party sources, but to the best of our knowledge, the information in this report is accurate.

1.1. Background

The Federal Lands Recreation Enhancement Act (FLREA, 2004) approved the introduction of a new federal lands recreation pass, which we will refer to here as the New Recreation Pass, or NRP. This new pass is scheduled to replace the existing Golden Eagle Passport and National Parks Pass in 2007. New passes will also replace the existing Golden Age and Access passports, offering benefits to individuals aged 62 and older and to those with physical disabilities.

The FLREA called for a pass to provide convenient and fairly priced access to federal recreation sites that charge fees; to provide opportunities for education on our federal lands; to provide support for public lands; and to develop partnerships with organizations that support recreation and stewardship on our public lands. This New Recreation Pass will cover the entrance fees for units administered by the National Park Service (NPS) and the National Wildlife Refuge System (NWRS), as well as standard amenity fees for developed areas administered by the Bureau of Land Management (BLM), the Bureau of Reclamation (BOR), and the U.S. Forest Service (USDA-FS). Fee areas generally include visitor centers or other developments with certain standard amenities (e.g., designated parking, camping sites, etc.). At present, it is not anticipated that the new pass will cover any expanded amenity fees for such things as reservation services or developed campgrounds and boat launches. When appropriate, pass holders will also pay special recreation permit fees such as those for motorized recreational vehicle use, recreational events, and group activities.

1.2. Purpose of the Benchmarking

This "benchmarking" report aims to place the possible prices of a new federal recreational land pass into the context of other similar recreational passes. To do this, we have used historical data on the U.S. federal land pass, as well as data on pricing and benefits for annual passes from Parks Canada, from U.S. state parks, and from a few other recreation venues. In consultation with agency representatives, we selected eight key states for detailed comparisons of state parks. Six of these

were also selected for the focus group portion of the larger project. The eight key benchmarking states are as follows:

- California (focus group – Fresno)
- Florida
- Massachusetts (focus group – Peabody)
- Oregon (focus group – Portland)
- Texas
- Utah (focus group – Salt Lake City)
- Virginia (focus group – Richmond)
- Wisconsin (focus group – Madison)

Although doing so was not part of the original project design, WYSAC was generally able to schedule meetings with state park officials in conjunction with the focus groups or other professional travel. Texas was the only state where we did not conduct a face-to-face interview, but even there we contacted state park officials by telephone and received information for this analysis. WYSAC also met with officials of Parks Canada for the same purpose. Additional data were collected as necessary from the relevant websites.

While providing general information on all state park systems, this report devotes particular attention to these eight key states. However, we begin at the national level with information about the current U.S. pass structure and some comparisons to Parks Canada.

2. Overview and Comparison of the U.S. and Canadian Systems

2.1. United States

As detailed below, many different passes for recreation on federal lands are recognized by various agencies. A variety of laws authorize these passes. The Duck Stamp Act of 1934 allowed the issuance of the Duck Stamp. The Land and Water Conservation Fund Act of 1965 and subsequent amendments authorized the Golden Eagle, Golden Age, and Golden Access passports. The National Parks Omnibus Management Act of 1998 authorized the National Parks Pass, which was implemented in April 2000.

Many provisions of the Federal Lands Recreation Enhancement Act of 2004 (the FLREA) parallel the earlier Land and Water Conservation Fund and the Recreation Fee Demonstration Program (RFDP, or Fee Demo Program), which for many years have helped to manage federal recreation lands. In 1996, under the RFDP, Congress permitted four federal land management agencies to charge visitor fees: the NPS, the Fish and Wildlife Service, the BLM, and the USDA-FS.

While most agencies welcomed the Fee Demo Program, assessments of its impact on federal recreation land management brought mixed reviews. Although the fees collected at over 300 federal recreation sites could alleviate initial shortfalls in funding, some analysts expressed concern that money collected from user fees would lead to “(1) continued decreases in government allocation(s); (2) a double taxation problem; (3) attention focused on fee generation and use function rather than preservation of public lands; (4) displacement, particularly among low-income users; (5) commodification of outdoor recreation experiences; and (6) additional ecological and social impacts from increasing amounts of users and new forms of recreation” (Shultis, 2005). To increase the

clarity of use of both funds and lands, Martin (1999) recommended that agencies clearly declare their general policies, criteria, and philosophies about the Fee Demo Program.

The experimental RFDP has generated close to a billion dollars in recreation fees since 1996 for the NPS alone. Congress extended the program several times so as to continue a revenue flow to land management agencies, conservation, experimentation with new fees and fee structures, and maintenance to improve service quality.¹ According to the U.S. Department of the Interior (2001), participating agencies or departments could retain all the revenue from the Fee Demo Program but had to spend at least 80% of the revenue “at the sites where the fees were collected.” Agency directors distributed the remaining 20% of the collected fees for special-emphasis projects. Some agencies allowed 100% of the fee revenues collected to remain at the collection site.

Currently, more than 500 federal sites in the U.S. charge fees for entrance or for specific recreational activities such as camping or boat launching. According to the Department of the Interior, “entrance and user fees for federal lands are not only used for conserving our nation’s land, wildlife, waterways and historical sites, but are used to develop, maintain, and improve visitor services and recreation opportunities” (2001, p. 2).

A comprehensive survey of the American public conducted for the NPS (2001) provides insights into public opinion about fees for access to federal lands. One-third of the survey respondents had visited at least one NPS unit within the past two years. A majority (60%) said they were “likely to visit a National Park System unit again within the next year.” Most of the respondents said that they had visited a national park to sightsee or vacation. Only 7% mentioned entrance fees as a reason for not visiting a national park. Most people preferred low entrance fees covering only basic amenities compared to high entrance fees covering expanded amenities. Most supported some kind of discount for senior citizens, students, and volunteers.

In a 1998 report commissioned by the National Park Foundation, Arc Consulting used focus groups and survey results to conclude that 77% of the respondents agreed that national parks should have entrance fees. People had generally positive and supportive attitudes towards park passes, but a few expressed concerns. Some respondents worried that people might see passes as “designating exclusive rights of ‘membership,’ while others reported strong beliefs in shared ownership of the parks and democratic access to their resources.”

Similar feelings surfaced when WYSAC conducted the focus group portion of the current study. Most of the focus group participants expressed strong support for federal recreational lands and their administration, coupled with concerns about the fee structure and the use of fee revenues.

Next we provide a summary of current nationwide recreational land passes, followed by a discussion of trends in pass prices and visitation.

2.1.1. Federal Duck Stamp Program

This pass was introduced in 1934 with a price of \$1 (Simon, 2005). Priced today at \$15, it serves as a day-use pass and a federal permit required for waterfowl hunters who are 16 years old or older. This pass is only good for National Wildlife Refuges and is valid from July 1 of any year through June 30

¹ Information on the RFDP was gathered from the National Park Service’s website (<http://www.nps.gov/feedemo/>) on November 24, 2005.

of the following year. If an area charges a per-vehicle fee, the pass admits the owner and any accompanying passengers in a private vehicle. If an area charges a per-person fee, the pass admits only the pass holder, spouse, and children.

The pass can be purchased at post offices, sporting goods stores or department stores, and at many national wildlife refuges, or by calling the Federal Duck Stamp Office. Stamps are also available online. Amplex Corporation has administered this pass program since 1989. Amplex sells the pass to the third-party vendors at face value and earns interest on sales revenues (Simon, 2005).

2.1.2. Corps of Engineers Annual Day-Use Pass

The Corps of Engineers Day-Use Pass is sold for \$30 and is valid for the calendar year of purchase. The pass allows the holder to use facilities governed by Corps of Engineers and admits the owner and any accompanying passengers (up to eight people) in a private vehicle. The pass covers fees for boat ramps or swimming beaches at Corps sites, but does not cover fees for camping or special facilities such as group picnic shelters, multipurpose courts, amphitheaters, and athletic complexes.

One may purchase this pass at any Corps site that charges day-use fees, or through the mail from most Corps district or lake offices.

2.1.3. Golden Eagle Passport (GEP)

This pass is valid for one year from the date of first use and costs \$65 (see Simon, 2005). The pass allows the holder to enter fee areas administered by the BLM, the NPS, the Fish and Wildlife Service, and the Forest Service. These may include developed day-use recreation sites (e.g., picnic sites, trailheads, visitor centers, and parking) as well as areas of high public use that may not be highly developed. If an area charges a per-vehicle fee, the pass admits the owner and any accompanying passengers in a private vehicle. If an area charges a per-person fee, the pass admits only the pass holder, spouse, and children. The pass does not cover fees associated with overnight camping, developed boat launches or swimming sites, specialized interpretive services, or concessionaire services.

This pass is available at most BLM, FWS, and Forest Service sites that charge entrance fees. One can also purchase it from the Forest Service and the Bureau of Land Management office. Prior to 2000, it was also available at NPS sites, but the NPS replaced the GEP with Golden Eagle Stickers (described below). Currently, the great majority of GEP sales are through the Forest Service.

2.1.4. Golden Eagle Sticker

The Golden Eagle Sticker affixed to the National Parks Pass (described next) provides the same benefits as the GEP (described above). The sticker costs \$15. Since its introduction in 2000, it has been available through all the same sources as the GEP and also at all NPS sites.

2.1.5. National Parks Pass

Public Law 105-391 of 1998 authorized the NPS to begin selling the National Parks Pass in April 2000 (Simon, 2005). This pass is available at most national parks, online, and by phone. The National Parks Pass is valid for one year from the date of first use. Its \$50 price was set by statute and has not changed since its introduction. The pass allows the holder to enter fee areas administered by the NPS. If an area charges a per-vehicle fee, the pass admits the owner and any accompanying passengers in a private vehicle. If an area charges a per-person fee, the pass admits

only the pass holder, spouse, and children. The pass does not include overnight camping, developed boat launching facilities or swimming sites, specialized interpretive services, or concessionaire services.

2.1.6. Golden Age Passport

This pass is valid for life and costs a one-time fee of \$10. Only citizens or permanent residents of the U.S. who are 62 or older may buy this pass. It allows the holder to enter the fee areas governed by the BLM, the NPS, FWS, Corps of Engineers (Corps), the Forest Service, and the Tennessee Valley Authority (TVA). If an area charges a per-vehicle fee, the pass admits the owner and any accompanying passengers in a private vehicle. If an area charges a per-person fee, the pass admits the pass holder, spouse, and children. In addition to the benefits of the Golden Eagle Passport, the Golden Age Passport provides a 50% discount at campgrounds, at developed boat-launching facilities and swimming sites, and for specialized interpretive services.

Since purchasers must show proof of age, they must buy this pass in person at BLM offices, TVA Watershed Team offices, or Corps, FWS, Forest Service, or NPS sites.

2.1.7. Golden Access Passport

This pass is valid for life. It is free to citizens or permanent residents of the U.S. who are legally blind or permanently disabled. It allows the holder to enter the fee areas governed by the BLM, the NPS, FWS, the Corps, the USDA-FS, and the TVA. If an area charges a per-vehicle fee, the pass admits the owner and any accompanying passengers in a private vehicle. If an area charges a per-person fee, the pass admits the pass holder, spouse, children, and other persons accompanying the holder such as parents or care assistants. In addition to the benefits of the Golden Eagle Passport, it provides a 50% discount at campgrounds, at developed boat launching facilities and swimming sites, and for specialized interpretive services.

Since applicants must show proof of medically determined permanent disability or eligibility for receiving benefits under federal law (a self-certification option is available at the BLM, the FWS, and the NPS), the Golden Access Passport can only be obtained in person at a BLM office, a TVA Watershed Team office, or a Corps, FWS, Forest Service, or NPS site.

2.1.8. Trends in Pass Prices and Visitation

Table 1 shows the history of Golden Eagle Passport (GEP) and National Parks Pass (NPP) prices. The GEP's real cost (in year 2000 dollars) hovered around \$40 for more than two decades after its introduction in 1965. The recent increases in nominal price (to \$50 and then to \$65) have put the current real cost of the pass at about \$57. The NPP, nominally \$50 since its introduction in 2000, now has a real cost of about \$44 in year 2000 dollars.

Tables 2 and 3 present sales and revenue figures based on internal records from the U.S. Department of the Interior. The figures are only approximate because the underlying records are not always mutually consistent. Beginning in 2000, the tabulated figures probably understate total revenues and GEP sales by failing to account fully for the sale of Golden Eagle Stickers. (The purchase of a sticker, in effect, converts the NPP into a GEP.) Another source of inaccuracy is the NPS practice of allowing visitors to "buy up" to a pass, by applying receipts from recent entrance fees toward the price of an annual pass. Arguably, the entrance fees that are so applied should be considered as pass revenue rather than as entrance fee revenue.

Table 1. Golden Eagle Passport and National Parks Pass Prices, 1965–2006

Year	GEP Price	GE Price Adjusted for Inflation*	NPP Price	NPP Price Adjusted for Inflation*
1965	\$7	\$38.27		
1970	\$10	\$44.38		
1986	\$25	\$39.28		
1997	\$50	\$53.65		
2000	\$65	\$65.00	\$50	\$50.00
2006	\$65	\$57.31	\$50	\$44.08

*Adjusted for inflation using CPI from the Federal Reserve Bank of Minneapolis (2006); base year is 2000.

Source for unadjusted prices: Simon, 2005.

Even with these caveats, Table 2 documents a huge drop in sales of the Golden Eagle Passport during 2000–2001, undoubtedly due to the introduction of the National Parks Pass in 2000. GEP sales have recently seen some recovery (a greater recovery if one were to consider sticker conversions), but outright GEP sales in 2003 were less than 10% of the 1999 sales. Meanwhile, NPP sales have increased more than 50% since 2000.

Table 2. Approximate Golden Eagle Passport and National Parks Pass Sales, 1997–2005

	1997	1998	1999	2000	2001	2002	2003	2004	2005
GEP	~194,000	~211,000	~224,000	~54,000	~10,500	~9,600	~20,800	~51,881	~53,663
NPP				200,000	~285,000	306,000	336,000	403,426	460,000
Total	~194,000	~211,000	~224,000	~254,000	~295,500	~315,600	~356,800	~455,307	~513,663

~ denotes an estimate based on reported revenue.

Source: Ms. Jolene Johnson Hall, NPS Recreation Pass Program Project Manager, US DOI; December, 2005.

Combined sales of the two passes showed robust and steady growth, nearly doubling since 1997. However, based on these figures, it appears that less than 1% of U.S. households purchase either the NPP or GEP in any given year. This contrasts sharply with Arc Consulting's (1998) projection that 37% of the U.S. population was likely to buy the GEP, a figure the consulting firm called "a conservative estimate."

Table 2 clearly shows that most pass purchasers choose the \$50 NPP rather than the \$65 GEP, which covers additional federal lands. Almost 90% of NPP purchasers would have to buy Golden Eagle Stickers to offset the decline in GEP sales following the NPP's introduction in 2000. Data on the number or proportion of sticker purchasers are not available, but a sticker purchase rate approaching 90% seems very unlikely.

Table 3 compares the revenue generated from GEP and NPP sales. A sharp drop in GEP revenue is evident for 2000–2001 due to the introduction of National Parks Pass in 2000. However, the combined revenue from both passes increased steadily, both in nominal dollars and after adjustment for inflation. The calculated increase in total pass revenue would likely be even greater if data on sticker sales were available.

Table 3. Approximate Golden Eagle Pass and National Parks Pass Revenue, 1997–2003

Fiscal Year	Golden Eagle		National Parks Pass		Total Revenue	Revenue Adjusted for Inflation*
	Price	Gross Rev.	Price	Gross Rev.		
1997	\$50	\$9,700,000			\$9,703,204	\$10,407,102
1998	\$50	\$10,500,000			\$10,500,000	\$11,092,638
1999	\$50	\$11,000,000			\$11,000,000	\$11,369,748
2000	\$65	\$3,500,000	\$50	\$10,100,000	\$13,600,000	\$13,600,000
2001	\$65	\$680,000	\$50	\$14,200,000	\$14,880,000	\$14,476,474
2002	\$65	\$625,000	\$50	\$15,300,000	\$15,925,000	\$15,243,385
2003	\$65	\$1,725,000	\$50	\$16,800,000	\$18,525,000	\$17,336,984

*Adjusted for inflation using CPI from the Federal Reserve Bank of Minneapolis (2006); base year is 2000.

Source: Ms. Jolene Johnson Hall, NPS Recreation Pass Program Project Manager, US DOI; December, 2005.

Current estimates obtained directly from agency personnel put total annual revenues from the Fee Demo Program at about \$230 million across all participating agencies. About \$20 million of this total comes from annual pass sales (mainly NPP), around \$100 million from entrance fees (mainly at NPS sites), and the remainder from expanded amenity fees (mainly at Forest Service sites). The costs of collection absorb about 20% of the revenues at NPS, and about 15% at the other agencies (see <http://www.usdo.gov>).

A recent study involving 33 national parks showed that National Parks Pass holders used each pass an average of three times to enter national parks (NPS, 2004). With a typical entrance fee at the gate of \$15 to \$20, the pass revenue from visitors who average three park visits per pass is approximately the same as the gate revenue that would have been generated if they had paid the entrance fees instead of buying the pass. However, if they also visited any other NPS sites not covered in the 33 park study, their purchase of the pass saved them money and cost NPS some foregone gate revenue. Similarly, if collection costs are higher for passes than for on-site entrance fees, then it seems likely that the NPP, at its current \$50 price, is a revenue loser for NPS relative to the foregone gate fees.

That same study (NPS, 2001) showed that vehicles using the NPP to enter one of these 33 national parks contained an average of 2.3 people, with 60% of those vehicles carrying only two people. More than half of pass buyers (54%) used cash to purchase the NPP from those 33 locations; the rest used credit cards. Most (77%) of the pass revenue came from five parks (Zion, Grand Canyon, Yosemite, Yellowstone, and Rocky Mountain national parks).

The growth in total pass revenues shown in Table 3 has occurred despite a decline in total visitation at NPS sites. The data in Table 4 show that from 2000 through 2005, with only a partial rebound in 2004, visitation at NPS sites declined from approximately 286 million to 273 million. That decline would be steeper if viewed in per capita terms, relative to the growing U.S. population. Because pass sales, in general, and NPP sales in particular increased markedly over the same period while visitation dropped, it appears that a rising proportion of visitors are using annual passes. However, the ratio of total NPS visits recorded to passes sold was almost six hundred to one in 2005. Apparently, relatively few visitors gain entrance to federal lands using either of these annual passes.

Table 4. Recreation Visits by Type of US-NPS Area, 2000–2005

Type of Area	2000	2001	2002	2003	2004	2005
<i>International Historic Site</i>	NA*	NA*	NA*	NA*	NA*	NA*
<i>National Battlefield</i>	1,515,034	1,578,131	1,564,104	1,533,005	1,447,045	1,493,340
<i>National Battlefield Park</i>	2,124,140	2,260,199	2,244,658	2,278,347	2,028,760	1,789,570
<i>National Battlefield Site</i>	NA*	NA*	NA*	NA*	NA*	NA*
<i>National Historic Site</i>	10,214,814	10,109,574	9,825,739	9,238,593	9,979,224	26,440,825
<i>National Historical Park</i>	26,625,827	26,292,964	25,574,254	25,054,246	26,842,325	9,989,032
<i>National Lakeshore</i>	3,619,755	3,469,258	3,759,717	3,659,566	3,458,680	4,001,782
<i>National Memorial</i>	26,330,618	26,462,172	25,186,654	23,115,959	31,798,631	30,067,075
<i>National Military Park</i>	5,348,379	5,667,987	5,822,486	5,352,739	5,046,909	5,050,109
<i>National Monument</i>	23,811,367	21,842,404	20,259,927	19,987,662	19,783,308	20,881,450
<i>National Park</i>	66,074,921	64,083,237	64,509,866	63,430,778	63,766,230	63,546,297
<i>National Parkway</i>	33,998,215	34,366,307	35,745,525	31,079,207	31,686,553	31,726,660
<i>National Preserve</i>	1,689,066	1,740,382	1,727,321	2,140,881	1,994,601	2,638,047
<i>National Recreation Area</i>	49,964,115	48,333,109	48,226,556	47,727,743	46,591,988	46,845,003
<i>National Reserve</i>	66,255	68,165	78,334	79,879	76,586	67,235
<i>National River</i>	4,297,272	4,431,108	4,441,655	3,800,063	4,356,663	4,283,832
<i>National Scenic Trail</i>	NA*	NA*	NA*	NA*	NA*	NA*
<i>National Seashore</i>	18,920,188	18,706,770	19,479,333	18,902,919	17,837,017	14,725,557
<i>National Wild and Scenic River</i>	938,755	814,496	863,977	797,120	924,863	1,114,220
<i>Parks (Other)</i>	10,352,557	9,947,663	7,989,774,911	7,920,934	9,288,954	8,828,717
NPS Total*	285,891,275	279,873,926	277,299,880	266,099,641	276,908,337	273,490,756

*The source provided no visitation information for the International Historic Site, National Battlefield Site, and National Scenic Trail categories. These are treated as zeroes in the NPS Total.

Source: <http://www2.nature.nps.gov/stats/> (retrieved on November 14, 2005).

As shown in Table 4, at about 275 million visits per year, visitation to the national parks is recovering from the recent low in 2003. The other federal lands administered by the Department of the Interior (fee areas and non-fee areas under BLM and FWS) add another 100 million visits per year.

Meanwhile, annual visitation to national forests appears to be fluctuating around 210 million visits. In 2001 a major project was undertaken by the USDA-FS to estimate and assess the number of and satisfaction with visits to national forests and grasslands (see English et al., 2004). Since most points of entrance and exit at national forests have no monitoring, visitations to these federal recreational lands are estimated by sampling. Over a four year period, the Forest Service National Visitor Use Monitoring Project (NVUM) sampled visitors at 25 percent of the national forests and grasslands, using over 22,000 days of volunteer and paid researcher time. Results from that project suggest that there were about 205 million visits to national forests and grasslands in 2003 for recreation, with

another 10 million visits in corridor drive-throughs. In 2000, the number of visits appeared to be 209 million, and in 2001, there were 214 million visits. These fluctuations may be due to sampling error or may represent some modest change in forest visits.

Roughly speaking, the total number of annual visits to national forests and grasslands appears to be about half the number of visits to areas managed by agencies in the Department of the Interior. The majority of the latter are visits to sites overseen by NPS, which are generally more developed with more visitor amenities. Most visits to national forests and grasslands are day use visits, with the greatest number being to undeveloped areas of the national forests. The White River National Forest in Colorado received the most visits, with over 9.7 visits annually, of which 6.5 million visits were for skiing.

The Golden Eagle Passport (or NPP plus the sticker) covers access to the national forests where access is monitored, as would the NRP. Individual national forests may have annual passes, sold for around \$20, but there is no annual National Forest Passport as such. The fact that the national forests and grasslands have relatively open access means that many visitors probably pay no entrance fee whatever. That would imply a large amount of potential revenue foregone.

Table 5 shows the number of Golden Age Passports sold since 1990. After a sharp dip in the mid 1990s, annual sales have apparently recovered to about their 1990 level. The decline may have been largely a demographic phenomenon, since the low birth rates during the Great Depression, which began around 1932, would produce relatively small numbers of Americans reaching age 62 in 1994 and for the next few years thereafter.

As shown in Table 5, the number of Golden Age Passports sold annually is currently about 375,000, producing \$3.75 million in revenue. Another 75,000 or so Golden Access Passports are given out free of charge each year. Together, the Age and Access passports approach the combined number of GEPs and NPPs sold per year (Table 2). This similarity in numbers has major revenue implications, especially when one considers two facts: (1) each Age or Access passport is a one-time acquisition (since the passes are good for the holder's lifetime), and (2) they not only cover entrance fees but also provide a 50% discount on many expanded amenity fees.

Table 5. Golden Age Passport Sales

Year	Total Golden Age Passports Issued	Year	Total Golden Age Passports Issued
1990	386,690	1998	254,656
1991	370,952	1999	254,851
1992	346,077	2000	250,213
1993	320,000	2001	296,702
1994	137,527	2002	296,702
1995	156,351	2003	327,390
1996	154,651	2004	373,055
1997	258,154		

Source: Ms. Jolene Johnson Hall, NPS Recreation Pass Program Project Manager, US DOI; December, 2005.

Unlike the NPP or the GEP, the Age and Access passports do not create an opportunity for a satisfied customer to buy one again. We can not know what proportion of Age or Access passport holders would buy the NPP or GEP if the other passports were not available. Still, it seems almost certain that the availability of the much cheaper lifetime pass substantially reduces the potential market for the two annual passes, and will have a similar effect on the NRP.

At \$10 per pass, Golden Age Passport sales currently augment the annual revenues generated from GEP and NPP sales by about 20%. If no Golden Age Passport existed, and if everyone who bought it in 2004 had instead purchased the higher-priced Golden Eagle Passport, total revenues would have increased by another \$20.5 million. Additional purchasers might also come from the ranks of those holding Golden Access Passports, if that pass were not available. The total resulting sales could well double the actual annual revenues from combined NPP, GEP, and Golden Age Passport sales. Indeed, the hypothetical figure is even higher if we consider holders of the lifetime passes from earlier years as potential purchasers of an annual pass. For example, if just 10% of Golden Age Passport purchasers from each of the five years prior to 2004 had purchased a GEP in that year, the agencies administering federal lands would have gained another \$9.3 million in revenue.

Clearly, the decision to offer such a deeply discounted pass to the nation's older people has had major revenue consequences, which will only intensify as the post-World War II "baby boom" generation becomes eligible for the lifetime pass beginning in 2007. This generation includes large numbers of healthy, active outdoor enthusiasts for whom reaching age 62 no longer means transitioning to a sedentary lifestyle, as it may have some decades earlier. Instead, they are transitioning to a new lifestyle that often includes both work and vigorous recreation. Many members of this generation will likely visit federal lands in their retirement and leisure time.

2.2. Canada

We turn next to a summary of the Canadian national park system, based on published sources, websites, and interviews with Parks Canada officials. The Canadian national park system strives to encourage "public understanding, appreciation and enjoyment" of Canada's "natural heritage so as to leave it unimpaired for future generations" (Parks Canada, 2004). Almost all of the 105 locations administered by Parks Canada charge entry and service fees and use the revenues to provide visitors with services and facilities.

Parks Canada offers three kinds of annual passes (summarized in Table 6). These passes are valid for one year from the month of purchase and give pass holders unlimited access to explore Canada's 28 national parks and 77 national historic sites. The passes are non-transferable and are valid for entry only, not for any other Parks Canada services or facilities. Parks Canada also charges location fees for daily filming and photography depending on the size of the crew. The campsite fees also differ depending on the services the site provides (e.g., electricity and water). Parks Canada passes can be purchased at any participating national park in Canada or by phone. All revenues obtained from the sale of annual passes, as well as day passes, are retained by the Park or Historic Site where the pass was purchased.

Table 6. Parks Canada Pass Prices

Pass Type**	National Parks*	National Historic Sites*	Both (Discovery Package)*	Both, \$U.S.
Adult	\$63.00	\$49.00	\$78.00	\$ 70.17
Senior	\$54.00	\$42.00	\$67.00	\$ 60.27
Youth	\$32.00	\$25.00	\$39.00	\$ 35.08
Family/Group	\$125.00	\$99.00	\$157.00	\$141.23

*Canadian dollars. Exchange rate of .899523 taken from <http://www.x-rates.com/> on June 8, 2006.

***Adult*: 17 to 64; *Senior*: 65 and over; *Youth*: 6 to 16; *Family/Group*: Up to seven people (maximum of two adults) who arrive at a national park in a single vehicle or visit a national historic site together.

Source: <http://www.parks.canada.ca/>. Information retrieved on November 16, 2005.

The Canadian pass option most similar to those available in the U.S. is the Discovery Package, which covers family or group entrance fees to Canada's 105 national parks and historic sites. This pass is directly comparable to the U.S. National Parks Pass, which covers entrance fees to national parks, historic sites, and other lands administered by the NPS. More generally, the Discovery Package might also be compared to the U.S. Golden Eagle Passport, which covers entrance not only to NPS sites but also to other federal lands that charge an entry fee. For either comparison, Canada's Discovery Package costs substantially more than its U.S. counterpart—\$141 U.S., compared to \$50 (NPP) or \$65 (GEP).

Table 7 offers some comparisons of U.S. and Canadian parks and pricing. Notably, with a top pass price that is almost three times the corresponding U.S. pass, Parks Canada reports annual pass revenues that are more than three times the U.S. figure. Total visitation at Parks Canada sites is only about one-thirtieth of U.S. visitation, implying that a much higher proportion of Canadian visitors use passes.

The Parks Canada agency surveyed Canadians between September 2003 and February 2004 to determine the prices of the passes. It asked respondents whether "they would prefer Parks Canada to maintain current prices, which would result in the Agency having to close facilities and reduce services or to ... increase prices in order to rebuild facilities and improve services." A majority of respondents accepted higher user fees because of Parks Canada's commitment to improving facilities and services. Some suggested increasing fees in phases, and the Canadian Parliament elected to extend the phase-in period from three to four years (2005 to 2008) and to stagger the fee increases for various services based on their comparability with prices charged at other heritage attractions across Canada and internationally (Parks Canada, 2005b).

A 2002 research report by Parks Canada concluded that the majority of Canadians value Canada's national parks, national historic sites, and marine conservation areas and see the protection of the natural environment as an important national issue (Parks Canada, 2005a). Nearly 80% of respondents indicated that they trust governmental authority to protect Canada's natural and cultural heritage. More than half of the Canadians surveyed also indicated that they had visited a national park or national historic site in the past year (which compares to about a third in the U.S.), and this group thought that Parks Canada ought to make public education about history and the natural environment a high priority. Around 90% of Canadians surveyed indicated that they would "strongly" or "somewhat" support the use of their tax dollars to maintain existing historic sites. 69% of respondents were willing to donate additional money to support national parks, national historic sites, or marine conservation areas and to support many of the activities that the Parks Canada agency performs.

Table 7. Comparison of Annual Parks and Passes: U.S. and Canada

Pass Characteristic	United States	Canada
<i>Number of people covered</i>	Vehicle (Family)	Vehicle (Max. 7 with 2 adults)
<i>Issuing formats</i>	Cards	Car tags or Cards
<i>Price</i>	\$50 (NPP); \$65 (GEP)	\$141 (Discovery Package, \$U.S.)
<i>Accepted payment methods</i>	Cash and major credit cards	Cash and major credit cards
<i>Purchasing locations</i>	At participating federal lands, online, or by phone	At participating national parks and historic sites or by phone
<i>Benefits</i>	Waives entrance fees	Waives entrance fees
<i>Exemptions</i>	No pass required for children under 16 and disabled persons; \$10 passes for seniors (62+)	Discounts for children between 6 and 16 and for seniors (65+)
<i>Number of units</i>	388 (NPS only)	105
<i>Park acreage</i>	79,005,557 (NPS only)	NA
<i>Total visitation (fee and non-fee areas)</i>	~600,000,000	21,483,422
<i>Visitations per 1,000 population</i>	~2,000	659
<i>Daily entry fee</i>	\$4.00–\$25.00	\$8.55–\$17.10 (\$U.S.)
<i>Any other annual pass</i>	Site-specific annual passes for most locations	Individual Annual Pass; National Historic Parks only and National Historic Sites only passes; Dual Park Combo Pass
2003 Annual Pass Revenue	~\$18,000,000	~\$66,703,714 (\$U.S.)
2003 Operating Expenses	~\$1,600,000,000	~\$454,355,473 (\$U.S.)
Annual Pass Revenue as a % of the Annual Operating Budget	~1.13%	~14.68%

Source: Official websites of the US DOI (<http://www.doi.gov/>) and Parks Canada (<http://www.parksCanada.ca/>). Information retrieved in November 2005.

Roughly 57% of respondents to that Parks Canada survey indicated that they were “very satisfied” with the fees and the services provided. 67% of visitors surveyed were “very satisfied” overall with their visit to the national park, national historic site, national historic canal, or marine conservation area they selected. 65% of the visitors were “very satisfied” with the value for the entrance fee, and 87% of the survey respondents who were “very satisfied” overall with their visit were also “very satisfied” with the value for the entrance fee.

Parks Canada plans to re-evaluate its annual pass prices every five years using similar research methods and to submit a proposal to Parliament with recommendations for possible adjustments. According to the Parks Canada budget (2005a), Parks Canada will get \$209 million in new, non-pass funding over the next five years and \$75 million per year thereafter to improve the quality of services (e.g., facilities and infrastructures). The agency’s other revenues, such as pass sales and visitor fees, will fund the remaining amount needed for maintenance. In 2003 -04, various fee revenues funded about 12%–14% of Parks Canada’s total expenses (Annual Report, 2004). A Parks Canada official who specializes in evaluating the annual pass prices described a funding source split of

approximately 70/30 between the revenues obtained from general funding such as appropriations from Parliament (70%) and revenues obtained from annual pass sales and gate receipts (30%).

Table 8. Parks Canada Recreation Visits by Type of Area, FY 2001–2005

	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005
National Parks	12,409,796	12,592,724	12,576,695	11,972,426	12,328,750
National Historic Sites	10,107,021	10,357,034	11,304,660	10,200,259	9,154,672
Parks Canada Total	22,516,817	22,949,758	23,881,355	22,172,685	21,483,422

Source: <http://www.parksCanada.ca/>. Information retrieved on November 16, 2005.

Table 8 shows that total visitation in Parks Canada declined over the past couple of years, a situation similar to that in the U.S. (see Table 4). This decline in park visitation might be understood in a number of ways. First, there was a mild economic slowdown in the 2002-2004 period that could have affected the amount of disposable income for recreation.

Second, there may also have been an “echo” baby boom effect. The baby boom is said to extend from 1946 to 1964, with the peak number of births in 1957. Using just 1957 as an approximate anchor, if we assume that most boomers complete their own family formation between the ages of 22 and 32, then second generation baby boom families would be complete between 1979 and 1989. And, if family vacations to national lands are a large part of the number of visitations, with the mean family child around ten years of age, we would expect that baby boom echo effects on park visitations set in between 1989 and 1999. As the baby boomers see their own children reach 16+ years, with numbers peaking around the year 2000, visitations may fall off. That is, once baby boomers have passed through their family formation years, visits to national lands in the U.S. and Canada may fall off until the population numbers offset the decline in baby boomer family activities.

A less optimistic forecast follows from a third explanation suggested by Pergams and Zaradic (2006). As they note, “after 50 years of steady increase, per capita visits to U.S. national parks have declined since 1988. ... We may be seeing evidence of a fundamental shift away from people’s appreciation of nature ... to focus on sedentary activities involving electronic media. Such a shift would not bode well” for future visitation to outdoor recreational lands. In other words, as the baby boom generation is succeeded by the video game generation, recreating on federal lands may continue to decline in popularity.

3. U.S. State Parks

This section examines the provisions and pricing policies of state parks in the U.S., since state park policies may be helpful in comparing the price and attributes of the NRP. The National Association of State Park Directors (NASPD) has compiled and published basic statistical data about the state parks for more than 25 years, obtaining consistent data since 1992. The NASPD meets on an annual basis and, in cooperation with the Department of Recreation and Park Administration at Indiana University, publishes the Annual Information Exchange Report, which is this section’s primary source of data on state parks nationwide.

U.S. state parks have a unique presence, with their natural, historical, and cultural resources offering close-to-home outdoor recreation opportunities. Most state parks provide large open spaces for

recreation and relaxation. U.S. state park agencies administer 5,793 areas, of which 4,847 are currently operating, on 13.8 million acres (National Association of State Park Directors, 2005). From July 1, 2003, to June 30, 2004, state parks reported 723.3 million visits (including day and overnight visits to both fee and non-fee areas). This is roughly the same magnitude as the total number of visits to federal lands administered by the Department of the Interior and the Forest Service.

The state park agencies administer 11 different types of areas. The largest single category is state parks as such, with 2,008 distinct parks that occupy 8.7 million acres of land. The 50 state park agencies administer 162,743 improved campsites, 6,532 cabins and cottages, 6,836 lodge rooms, 229 restaurants, 2,172 golf courses, 75 ski slopes, 305 marinas, 303 swimming pools, and 99 stables. Table 9 shows the numbers of major facilities in each state.

Table 9. State Park Total Acreage and Major Facilities (June 30, 2004)

State	Park Acreage	Improved campsites	Cabins & Cottages	Group Facilities	Restaurants
<i>Alabama</i>	49,710	2,522	179	2	5
<i>Alaska</i>	2,990,641	0	51	0	0
<i>Arizona</i>	25,146	1,343	11	7	0
<i>Arkansas</i>	23,189	1,532	116	2	7
<i>California*</i>	1,123,947	9,600	60	3	14
<i>Colorado</i>	201,286	2,215	57	0	0
<i>Connecticut</i>	23,281	1,304	0	0	0
<i>Delaware</i>	20,270	852	31	18	0
<i>Florida*</i>	244,869	3,399	146	3	1
<i>Georgia</i>	79,216	2,479	361	15	5
<i>Hawaii</i>	24,036	75	50	0	3
<i>Idaho</i>	29,164	1,364	57	3	0
<i>Illinois</i>	74,648	6,483	186	0	10
<i>Indiana</i>	63,079	6,426	111	6	7
<i>Iowa</i>	34,383	4,570	72	3	2
<i>Kansas</i>	32,900	6,700	32	1	2
<i>Kentucky</i>	39,638	2,610	332	1	17
<i>Louisiana</i>	31,683	1,223	191	12	0
<i>Maine</i>	26,710	819	0	0	0
<i>Maryland</i>	91,942	2,314	131	0	0
<i>Massachusetts*</i>	54,935	3,340	20	0	0
<i>Michigan</i>	186,244	12,543	161	0	0
<i>Minnesota</i>	202,866	3,873	72	11	1

<i>Mississippi</i>	23,395	1,618	234	12	3
<i>Missouri</i>	135,902	3,571	192	13	9
<i>Montana</i>	33,248	442	5	0	0
<i>Nebraska</i>	31,478	3,555	217	1	3
<i>Nevada</i>	69,950	642	3	0	0
<i>New Hampshire</i>	64,633	1,120	3	0	0
<i>New Jersey</i>	332,977	1,191	70	3	9
<i>New Mexico</i>	89,420	1,572	17	0	0
<i>New York</i>	313,062	14,663	756	38	28
<i>North Carolina</i>	103,462	2,927	12	5	1
<i>North Dakota</i>	9,230	818	35	2	0
<i>Ohio</i>	164,406	9,338	518	7	12
<i>Oklahoma</i>	68,911	3,911	252	18	13
<i>Oregon*</i>	48,745	5,327	258	2	3
<i>Pennsylvania</i>	276,689	5,295	287	5	2
<i>Rhode Island</i>	8,063	1,126	1	0	0
<i>South Carolina</i>	29,926	2,856	156	6	1
<i>South Dakota</i>	78,415	3,310	209	0	12
<i>Tennessee</i>	116,943	34	19	13	11
<i>Texas*</i>	514,209	7,047	163	26	26
<i>Utah*</i>	144,725	1,628	7	0	3
<i>Vermont</i>	50,361	2,232	26	7	0
<i>Virginia*</i>	60,598	1,306	202	38	2
<i>Washington</i>	69,148	7,384	123	17	4
<i>West Virginia</i>	80,337	1,257	333	3	12
<i>Wisconsin*</i>	67,607	972	7	4	0
<i>Wyoming</i>	115,929	15	0	2	1
Total	8,725,842	162,743	6,532	309	229

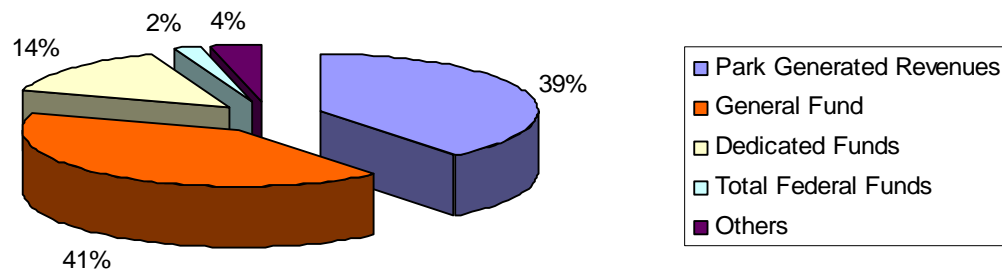
*Shaded rows denote the eight states of primary interest for this report.

Source: National Association of State Park Directors, 2005a.

McLean (2000a) recently warned that despite gains in state park acreage and visitation during the 1990s, fiscal challenges lay ahead. This prediction has proved well-founded, with many states reducing their state general fund's support for state parks in the past few years (NASPD, 2005a). NASPD (2005a) reports state park income in five categories: 1) park-generated revenues, 2) the state general fund, 3) dedicated funds earmarked for capital improvements, 4) federal funds, and 5) other sources. In the 1990s, more than half of total operating budgets typically came from state general funds (McLean, 2000a). Figure 1 and Table 10 show that in 2004 only 40% of operating expenses

came from state general funds. State park operating expenses from all sources equal about 0.2% of the states' budgets, on average, and a few states provide no general fund revenues at all.

Figure 1. FY 2004 Sources of Operating Funds



Source: National Association of State Park Directors, 2005a.

Table 10. State Parks' Operating Budgets and Revenues (June 30, 2004)

State	Total State Expenditure (\$)	State Park Operating Budget (\$)	% of State Budget	Park-Generated Revenues (\$)	Park Revenue as % of Operating Budget	General Fund (\$)	Dedicated Funds (\$)
Alabama	9,068,038,460	28,726,590	0.32%	22,953,442	80%	0	5,438,595
Alaska	4,763,402,149	5,761,500	0.12%	1,462,200	25%	3,504,200	120,900
Arizona	20,109,656,400	19,353,800	0.10%	8,851,127	46%	2,203,400	7,564,673
Arkansas	13,172,406,234	34,184,452	0.26%	12,990,518	38%	13,016,974	8,163,236
California	39,049,622,000	273,834,000	0.70%	78,087,000	29%	97,291,000	46,078,000
Colorado	13,583,479,688	26,811,737	0.20%	18,150,983	68%	2,831,763	4,940,060
Connecticut	13,755,000,000	11,976,900	0.09%	0	0%	11,210,200	766,700
Delaware	3,121,407,400	23,542,700	0.75%	7,668,400	33%	6,751,300	4,610,400
Florida	58,036,700,000	71,942,225	0.12%	38,273,069	53%	0	32,501,822
Georgia	16,174,683,712	55,557,976	0.34%	27,188,420	49%	19,626,911	2,100,000
Hawaii	7,400,172,663	2,672,568	0.04%	1,772,568	66%	0	0
Idaho	4,340,303,800	16,567,200	0.38%	4,277,600	26%	7,054,200	4,453,000
Illinois	68,360,877,131	50,481,404	0.07%	11,827,074	23%	28,416,700	10,237,630
Indiana	20,000,044,039	35,169,211	0.18%	29,163,347	83%	6,005,864	0
Iowa	4,500,000,000	13,188,957	0.29%	3,645,510	28%	6,976,364	2,003,000
Kansas	10,990,900,850	8,443,169	0.08%	5,982,060	71%	1,516,725	50,000
Kentucky	16,931,384,664	79,282,156	0.47%	50,869,056	64%	28,413,100	0
Louisiana	13,800,000,000	21,251,626	0.15%	199,613	1%	21,052,013	0

<i>Maine</i>	2,642,999,485	7,794,052	0.29%	0	0%	6,462,994	1,209,218
<i>Maryland</i>	22,975,000,000	37,567,445	0.16%	15,127,817	40%	21,671,133	0
<i>Massachusetts</i>	22,000,000,000	31,112,703	0.14%	2,198,692	7%	26,320,795	0
<i>Michigan</i>	38,017,893,600	51,351,324	0.14%	29,706,275	58%	0	21,645,049
<i>Minnesota</i>	23,328,609,000	27,987,000	0.12%	9,261,000	33%	15,299,000	3,427,000
<i>Mississippi</i>	3,434,911,661	12,649,335	0.37%	6,869,081	54%	4,905,565	0
<i>Missouri</i>	17,778,972,628	29,410,177	0.17%	4,954,704	17%	716,723	22,369,990
<i>Montana</i>	3,142,270,239	7,017,069	0.22%	1,978,339	28%	0	4,338,982
<i>Nebraska</i>	4,415,638,622	16,313,615	0.37%	11,092,695	68%	4,557,138	633,395
<i>Nevada</i>	5,900,072,627	9,295,783	0.16%	2,310,590	25%	5,036,837	1,551,405
<i>New Hampshire</i>	3,944,374,848	8,499,902	0.22%	8,499,902	100%	0	0
<i>New Jersey</i>	23,701,822,000	33,941,614	0.14%	3,360,614	10%	30,581,000	0
<i>New Mexico</i>	9,578,642,400	18,809,300	0.20%	3,619,200	19%	8,869,800	1,005,000
<i>New York</i>	20,359,000,000	164,896,000	0.81%	60,945,900	37%	94,043,100	6,190,000
<i>North Carolina</i>	27,863,766,521	34,249,773	0.12%	3,614,408	11%	20,209,463	9,657,449
<i>North Dakota</i>	2,529,719,698	2,861,410	0.11%	1,021,003	36%	1,820,369	0
<i>Ohio</i>	48,667,200,000	66,477,359	0.14%	28,621,889	43%	34,044,043	3,811,427
<i>Oklahoma</i>	13,053,000,472	37,358,367	0.29%	21,586,876	58%	14,346,374	908,745
<i>Oregon</i>	17,999,425,023	41,416,652	0.23%	18,784,912	45%	0	20,754,778
<i>Pennsylvania</i>	55,475,000,000	68,050,000	0.12%	16,443,000	24%	51,207,000	0
<i>Rhode Island</i>	5,959,400,958	8,240,176	0.14%	0	0%	8,240,176	0
<i>South Carolina</i>	15,425,467,943	23,334,689	0.15%	15,145,799	65%	0	0
<i>South Dakota</i>	2,703,284,538	12,519,078	0.46%	7,416,513	59%	2,586,357	905,000
<i>Tennessee</i>	22,200,565,700	60,691,800	0.27%	32,510,600	54%	26,781,200	1,400,000
<i>Texas</i>	59,585,635,670	51,355,498	0.09%	14,898,102	29%	20,957,396	15,500,000
<i>Utah</i>	6,702,566,000	22,935,000	0.34%	8,221,000	36%	8,464,600	5,743,600
<i>Vermont</i>	3,574,308,641	6,557,558	0.18%	6,212,763	95%	301,795	0
<i>Virginia</i>	26,379,372,090	17,143,857	0.06%	6,431,769	38%	10,712,088	0
<i>Washington</i>	28,109,000,000	45,517,788	0.16%	14,556,368	32%	29,985,168	627,915
<i>West Virginia</i>	9,330,000,000	29,061,577	0.31%	18,389,666	63%	8,299,528	2,372,383
<i>Wisconsin</i>	26,617,601,000	19,751,700	0.07%	9,387,800	48%	4,775,600	4,577,400
<i>Wyoming</i>	2,207,293,195	8,237,043	0.37%	0	0%	5,894,066	0
Total	912,760,893,749	1,791,152,815	0.20%	706,529,264	39%	722,960,022	257,656,752

Shaded rows denote the eight key states for this report.

Source: The National Association of State Park Directors, 2005a.

Reductions in their states' contributions for operating expenses, along with inflationary pressure and general economic conditions, have forced at least ten state park agencies to increase user fees. At least seven states have reduced employee payrolls, and at least eight states have encouraged early retirements (NASPD, 2005b). On average, about 39% of 2003–2004 state park operating budgets came from user fees, and the recent legislative and administrative emphasis in most state park systems seeks to make them even more self-sufficient and revenue-oriented. Decreasing (or, at best, constant) revenue from state general funds has meant that park budgets for operation and management have generally not kept up with inflation. State park agencies respond to their fiscal challenges by encouraging privatization, contract management, fundraising, and by implementing and expanding various fee programs.

Most of the state park systems currently charge at least some kind of user fees, such as entrance, parking, lodging, rental, or campsite fees. The specifics are constantly in flux, but Table 11 provides an overview, as of the date of this report. Except as noted, the table indicates the price of an annual, statewide vehicle pass for non-residents of the state. Most states' annual passes cover the basic amenities (entry and parking) but not expanded amenities (e.g., camping and boat launching).

Table 11. Prices of State Annual Passes

State	Number of Units	Current Annual Pass Price (\$)	Entry Type
<i>Alabama</i>	22	No pass	NA
<i>Alaska</i>	31	40.00	Vehicle
<i>Arizona</i>	29	100.00	Vehicle
<i>Arkansas</i>	51	Free	NA
<i>California</i>	278	125.00	Vehicle
<i>Colorado</i>	41	55.00	Vehicle
<i>Connecticut</i>	62	60.00	Vehicle
<i>Delaware</i>	14	54.00	Vehicle
<i>Florida</i>	159	85.80	Vehicle
<i>Georgia</i>	63	30.00	Vehicle
<i>Hawaii</i>	52	Free	NA
<i>Idaho</i>	28	25.00	Vehicle
<i>Illinois</i>	121	No pass	NA
<i>Indiana</i>	24	46.00	Vehicle
<i>Iowa</i>	71	Free	NA
<i>Kansas</i>	24	36.65	Vehicle
<i>Kentucky</i>	52	Free	NA
<i>Louisiana</i>	36	30.00	Vehicle/ Individual
<i>Maine</i>	33	60.00	Individual
<i>Maryland</i>	55	100.00	Vehicle

<i>Massachusetts</i>	135	45.00	Vehicle
<i>Michigan</i>	97	25.00	Vehicle
<i>Minnesota</i>	70	25.00	Vehicle
<i>Mississippi</i>	24	20.00	Vehicle
<i>Missouri</i>	82	No pass	NA
<i>Montana</i>	42	25.00	Vehicle
<i>Nebraska</i>	75	18.35	Vehicle
<i>Nevada</i>	24	90.00	Vehicle
<i>New Hampshire</i>	67	100.00	Vehicle/ Individual
<i>New Jersey</i>	103	50.00	Vehicle
<i>New Mexico</i>	32	40.00	Vehicle
<i>New York</i>	205	59.00	Vehicle
<i>North Carolina</i>	34	40.00	Vehicle
<i>North Dakota</i>	16	25.00	Vehicle
<i>Ohio</i>	74	Free	NA
<i>Oklahoma</i>	50	Only 1 park has an entrance fee	Vehicle
<i>Oregon</i>	180	25.00	Vehicle
<i>Pennsylvania</i>	116	No pass	NA
<i>Rhode Island</i>	27	60.00	Vehicle
<i>South Carolina</i>	47	50.00	Individual
<i>South Dakota</i>	57	23.00	Vehicle
<i>Tennessee</i>	51	Free	NA
<i>Texas</i>	120	60.00	Individual
<i>Utah</i>	41	70.00	Vehicle
<i>Vermont</i>	52	75.00	Individual
<i>Virginia</i>	44	55.00	Vehicle
<i>Washington</i>	114	50.00	Vehicle
<i>West Virginia</i>	NA	No pass	NA
<i>Wisconsin</i>	95	35.00	Vehicle
<i>Wyoming</i>	24	25.00	Individual

Shaded rows denote the eight key states for this report.

Source: NPS, 2005b; NPS, 2006; various state park offices and websites.

Excluding several states that declare their state parks free, Nebraska charges the least (\$18.35) and California the most (\$125) for annual passes. As indicated in Table 11, eight state park agencies have set their annual pass price higher than the \$65 Golden Eagle Passport, including four states at \$100

or more. Almost half of the states with annual passes have set their pass price equal to or greater than the \$50 National Parks Pass.

4. Comparison of Eight Selected States

With guidance from the NRP program agencies, a list of eight state park systems was developed for more detailed analysis. We based the decision to include these eight states on their location, size, and diversity in state characteristics. While we do not claim that these eight states are representative of all state park systems in the United States, they nonetheless encompass many of the characteristics found across the U.S. that would affect pricing of the federal recreational land pass. For example, as shown in Table 11, these 8 states include 3 with annual pass prices greater than the Golden Eagle, 2 more with pass prices greater than the National Parks Pass, and 3 with annual passes that sell for \$45 or less.

The sources of data throughout this section include the state park websites for each state and personal communications with state parks officials. WYSAC researchers conducted face-to-face interviews with state park officials in seven of the eight states, plus a telephone interview with a Texas park official. The park officials contacted shared many similar opinions about annual passes, pricing strategies, budgets, and ways to improve the state park system's performance. Many of them also expressed interest in the current study and enthusiasm for closer communication and cooperation with the agencies that administer federal lands and pass programs.

Despite these similarities, the states use very different methods to estimate park visitation. For example, Utah simply sums the total number of entrants but excludes visitations by construction workers or park officials. Virginia officials calculate attendance by multiplying the number of daily parking passes sold by four, the number of occupied campsites by 4.5, and the number of occupied cabins by 4.1. They also installed traffic counters at unstaffed access points and multiplied the number of cars registered on the traffic counters by four. They then add these figures to an estimate made by individual park management that accounts for the following attendance variables: annual pass holders, hiking and biking access, boat access, special event attendance, and staff vehicles registering on traffic counters (a negative entry). Some minor variations exist in this refined estimate to account for special situations. The method's value lies in its consistent application from year to year, which allows for trend analyses within the state.

Comparisons across states are limited in precision, given the states' widely differing methods for counting visitors. Indeed, we must view even comparisons over time within a state cautiously, since the methodologies themselves are subject to change. For example, a seemingly precipitous decline in visitation to Texas state parks from FY 2003 to FY 2004 can be explained by a change in the agency's counting method.

With these caveats noted, Table 12 indicates that five of the eight state park systems examined lost visitors over the fiscal years 2000 - 2004. The exceptions are Florida, Oregon, and Virginia. Officials in states where visitation declined offered no consistent explanation for the trend (which is similar to that noted earlier for national parks visitation in the U.S. and Canada). Since Texas reorganized its estimation procedures, we can not state with certainty that Texas lost visitation, but we include Texas to demonstrate how difficult it is for the states to make and maintain realistic visitation counts.

Table 12. Annual State Park Visitation for Selected States, FY 2000–2004

State	FY 2000	FY 2001	FY 2002	FY 2003	FY 2004
<i>California</i>	98,519,949	80,305,625	85,664,789	85,778,617	82,031,611
<i>Florida</i>	16,672,326	18,133,491	17,734,774	18,241,109	19,117,944
<i>Massachusetts</i>	12,775,063	12,282,378	11,883,637	10,512,209	10,050,913
<i>Oregon</i>	38,563,461	39,758,298	39,438,936	39,243,783	45,144,475
<i>Texas</i>	18,750,576	17,539,656	17,089,692	17,620,047	9,715,728
<i>Utah</i>	6,737,083	6,295,779	5,940,741	5,805,755	5,867,074
<i>Virginia</i>	5,717,026	6,011,233	6,856,305	5,622,730	6,125,745
<i>Wisconsin</i>	15,470,176	15,993,799	15,528,496	15,738,820	14,967,419

Source: National Association of State Park Directors, 2005b.

Since both Florida and Oregon have had consistent population growth over the last ten years, it is useful to adjust park visitations by population size, lest the increase in population size alone contribute to the increase in state visitations to state parks. This adjustment is only approximate, because visitors to state parks are not drawn solely from residents of that state.

Table 13 presents the adjustment, which corroborates the view that only Florida, Oregon, and Virginia had increased visitation between 2000 and 2004. The table also shows that Oregon has by far the highest visitation rate per 1000 inhabitants of the 8 states detailed here. Three of these states are close to the national average of about 1000 visits per capita, and four are two or three times that average. Seven of the states have rates that are in the same order of magnitude as visitation per capita to U.S. federal lands and to Parks Canada (Table 7). Oregon stands out as an exceptional case, with a rate more than 10 times the national average for state park visits per inhabitant.

Table 14 shows the annual fee revenue generated by the eight state park systems over the past five years. Seven of the eight states increased their fee-generated revenues, and the eighth (Massachusetts) also showed an increase until the most recent year. With visitation generally declining, the increase in total fee revenue must be attributable to rising fees.

We turn next to state by state descriptions of the 8 state park systems. We begin with California, for which the available information is most detailed. As will become apparent, state park systems are highly varied, and so too is the depth of information available about those systems.

Table 13. Annual State Park Visitation Rates for Selected States, FY 2000 and 2004

State	Visitation Rate per Thousand (2000)	Visitation Rate per Thousand (2004)
<i>California</i>	2909	2285
<i>Florida</i>	1043	1099
<i>Massachusetts</i>	2012	1566
<i>Oregon</i>	11,271	12,559
<i>Texas</i>	899	432
<i>Utah</i>	3017	2456
<i>Virginia</i>	808	821
<i>Wisconsin</i>	2884	2717
United States	1016	943

Visitation rate is calculated by dividing the number of state park visits in a state by the population (in thousands) of the state in 2000 and 2004.

Source: National Association of State Park Directors, 2005b; U.S. Census Bureau, 2006.

Table 14. Annual State Park Fee Revenues (Nominal) for Selected States, FY 2000–04

State	FY 2000	FY 2001	FY 2002	FY 2003	FY 2004
<i>California</i>	\$59,111,989	\$38,967,077	\$29,519,676	\$47,225,000	\$60,301,000
<i>Florida</i>	\$25,766,021	\$28,577,198	\$29,892,927	\$31,925,406	\$32,074,581
<i>Massachusetts</i>	\$5,570,434	\$5,725,161	\$7,217,763	\$8,210,610	\$5,484,070
<i>Oregon</i>	\$14,987,767	\$15,831,445	\$15,119,198	\$15,198,524	\$18,482,436
<i>Texas</i>	\$24,419,652	\$20,281,945	\$21,109,374	\$21,764,929	\$24,799,274
<i>Utah</i>	\$5,570,000	\$5,722,200	\$6,013,700	\$5,689,100	\$5,940,300
<i>Virginia</i>	\$7,258,399	\$6,476,873	\$7,911,583	\$8,583,791	\$8,726,989
<i>Wisconsin</i>	\$11,438,058	\$12,854,701	\$13,245,674	\$14,395,841	\$14,224,379

Source: National Association of State Park Directors, 2005b.

4.1. California

4.1.1. Holdings, Visitation, and Employment

With 278 classified and unclassified units in 23 districts, including five in the Off-Highway Motor Vehicle Recreation Division, the California Department of Parks and Recreation (CDPR) administers more distinct units than any other state park system. CDPR owns over a million acres of land (second only to Alaska in state park acreage), which is more than 1% of California's total area. Because of population growth, California has fewer acres of state park per capita today than at any time since 1930. The CDPR owns over 6.5 million feet of waterfront (more than 1000 miles), including 3.4 million feet of lakefront, 1.6 million feet of oceanfront, and 1.7 million feet of riverfront land. The CDPR provides the public with over 15,000 individual and group campsites, 590 non-camping overnight facilities, nearly 8,000 picnic sites, and 3,760 miles of non-motorized trails.

More than 82 million people visited California state parks in the 2003–2004 fiscal year, including about 3% of park visitors who operate off-highway vehicles in state park units each year.

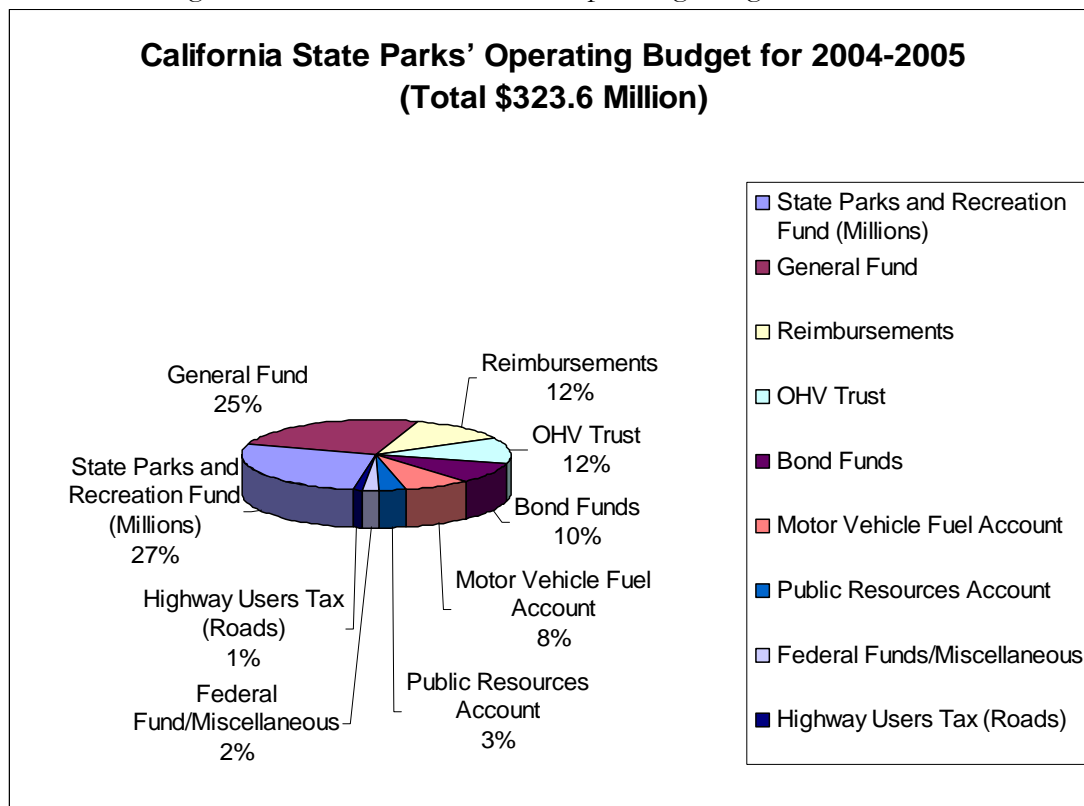
California State Parks is authorized to employ approximately 2,400 permanent staff and approximately 2,700 seasonal staff to administer, protect, operate, and maintain the state park system. Nearly 11,000 volunteers contributed over 900,000 hours to the system in 2003. Volunteers staff visitor centers, maintain trails, serve as camp hosts, present interpretive programs and special events, and do much more.

4.1.2. Operating Budget

The 2004–2005 state budget reduced California’s general fund appropriation for its state parks by \$15 million. California State Parks increased user fees to offset budget cuts as well as to raise an additional \$3 million fund. Parks will use this fund to hire seasonal personnel (who staff the fee-collection kiosks and entrance stations) and to address maintenance needs throughout the system.

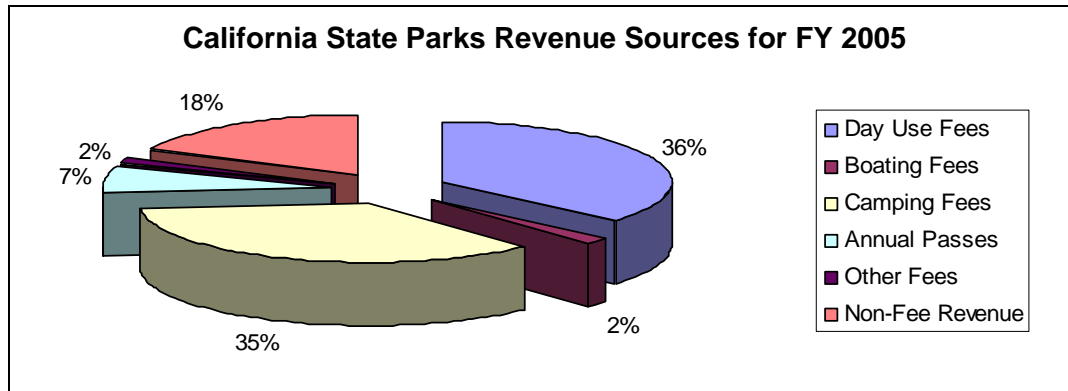
Figure 2 shows that 27% of the California State Parks total operating budget comes from the State Parks and Recreation Fund, and Figure 3 indicates the various fees that comprise the main sources of that fund. The day-use fee for California’s state parks currently ranges from \$2 to \$15. (Buyers can visit multiple state park units in the same day after buying a one-time day-use pass.) The revenue earned from annual pass sales (including all kinds of annual passes; see Figure 3) was \$5,667,687 for FY 2004–2005 and \$2,321,454 for the first five months of FY 2006.

Figure 2. California State Parks’ Operating Budget for FY 2005



Source: California State Parks Office, Sacramento, CA (2005).

Figure 3. California State Parks and Recreation Fund Revenue Sources for FY 2005



Source: California State Parks Office, Sacramento, CA (2005).

As of FY 2004, California State Parks' concessions program included over 170 concession contracts held by for-profit and non-profit concessionaires. One of the more innovative of these partnerships is an arrangement with SBC Communications to bring high-speed wireless internet access to picnic tables, tents, RV spaces, and cabins at some parks. California State Parks also has 46 operating agreements with public agencies that cover some state park units or portions thereof.

State park units act as an economic boost to local communities. For example, visitors to Morro Bay State Park added \$15 million to the local economy in direct and indirect expenditures over two years. The visitors' expenditures created 364 jobs in Morro Bay, primarily in recreation and amusement, hotels, restaurants, and retail shops. According to California State Parks officials, the 85 million visitors to the state park system in the 2001–2002 fiscal year spent approximately \$2.6 million in local communities and supported over 100,000 jobs statewide. Gross sales through the concessions program exceed \$94 million, and the department collects over \$10 million in rent. A total of 80 cooperating associations operate in park units throughout the state. The funds these associations generate through sales at park stores, special event admissions, and fundraising help continue interpretive programs at the individual parks. These associations' net income in 2003 was nearly \$11 million.

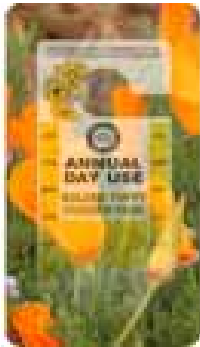
In the next section, we summarize the variety of passes available for California State Parks. The information presented is largely paraphrased from http://www.parks.ca.gov/?page_id=1049, as accessed on November 7, 2005.

4.1.3. Passes



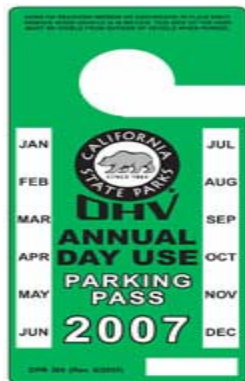
Annual Day-Use Parking Pass

This pass costs \$125 and may be purchased online. The pass is for “any passenger vehicle and is valid at all state-operated parks” that collect a parking fee. The vehicle must display the pass on its “rearview mirror or dashboard.” The passes are good one year from the date of purchase. At the time of purchase, the passes are hole-punched for the month in which they are purchased. Off-highway vehicle (OHV) recreational units do not honor the Annual Day-Use Parking Pass; they only accept the OHV Annual Day-Use Pass.



Golden Poppy Annual Day Use Pass

This pass is recommended as a great value for frequent visitors of inland, northern and reservoir parks, costing only \$90. This pass gives the visitor and occupants in a vehicle parking for one year and is honored at 98 selected parks that charge a day use parking fee.



DHV Annual Day-Use Parking Pass

This pass costs \$50 and is available online. The pass is for any passenger vehicle and is valid at all state-operated Off-Highway Vehicle Recreational Areas. The vehicle must display the pass “on its rearview mirror or dashboard.” A list of the OHV parks that accept the OHV Day Use Parking Pass appears online at <http://ohv.parks.ca.gov/>. The OHV Day-Use Parking Pass is only honored at OHV units and not at any other type of state park.

Annual Boat Use Pass

This small sticker adheres to the Annual Day-Use Parking Pass hang tag (or to a separate card for those who already have their passes and for Golden Bear Pass users). It costs \$75. “This pass waives boat-launching fees for all motorized vessels and for sailboats over eight feet” long. No boat-launch fees are assessed for sailboats “under the length limit or for non-motorized craft,” so their users do not need an Annual Boat Use Pass.

Golden Bear Pass

This pass is for seniors “62 years of age or older with income limitations (specified on the application form); for persons receiving aid to the aged, blind, or disabled; and for persons receiving Aid to Families with Dependant Children.” This \$5 annual pass entitles the bearer and spouse to use parking facilities in state-operated parks for one year from the date of purchase. At the time of purchase, the passes are hole-punched for the month in which they are purchased. Persons who wish to obtain the pass must download an application, fill it in, and submit it in person to a unit of the California State Parks system or to the CDPR Pass Program Office.

Disabled Discount Pass

Permanently disabled persons may purchase a \$3.50 discount card from CDPR. “The pass provides a year-round 50% discount for all basic facility use (including parking and camping) in state-operated parks (except in Hearst San Simeon State Historical Monument). The discount does not apply to fees under \$2 or to supplementary fees and cannot be used with any other discount or pass program.” Persons who wish to obtain the pass must download an application, fill it in, and submit it in person to a district office or to the Department Pass Program Office.

Disabled Veteran/Prisoner of War Pass

This lifetime pass for “honorably discharged war veterans who are residents of California” costs \$3.50. Applicants must have a “service-connected disability rated at 50% or more, have a service-connected disability rated at 100% for reasons of employability, or have been held as a prisoner of war by forces hostile to the United States.” This pass “entitles the bearer to free use of all California State Parks system facilities, including camping and day use,” but it does not cover supplemental fees. Persons who wish to obtain the pass must download an application, fill it in, and send it to the Department of Parks and Recreation.

SNO-PARK Season and Day Permits

The CDPR “operates 21 SNO-PARK sites that provide snow-cleared parking lots with sanitation facilities, access to snow play areas, and cross-country ski and snowmobile trails.” “Each vehicle parked at a SNO-PARK site from November 1 through May 30 of each year” requires a SNO-PARK permit. Permit vendors throughout northern California sell these as day permits or seasonal permits. Day permits cost \$5 and “are valid for a single day.” Seasonal permits cost \$25 and “are valid for the entire SNO-PARK season from November 1 through May 30.”

4.2. Florida

4.2.1. Holdings, Visitation, and Employment

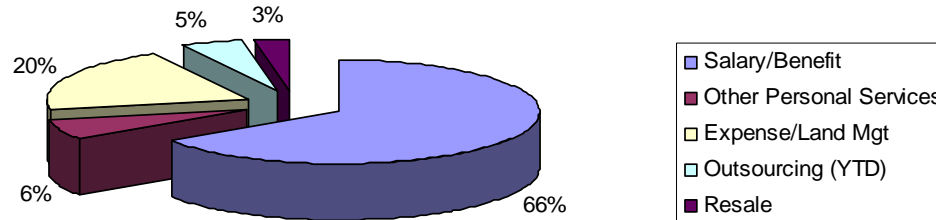
In number of units, Florida State Parks is the fourth-largest state system in the country with 159 parks and more than 100 miles of beach. They offer year-round outdoor activities for visitors of all ages, including fishing, hiking and riding on natural scenic trails, battle reenactments, and Native American festivals. Several parks showcase Florida’s unique history with museums.

Florida State Parks provides the public with over 3,000 individual and group improved campsites and 146 non-camping overnight facilities. Over 17.3 million visitors each year visit Florida state parks. The agency employs 1,000 salaried employees and has 6,000 volunteers.

4.2.2. Operating Budget

As Figure 4 shows, Florida State Parks spends most of its funding on personnel.

Figure 4. Florida State Parks' Expenditures for FY 2004–2005



Source: Florida State Parks Office (2006).

Because of Florida's population growth, providers of outdoor recreation facilities and services continue to be pressured to meet expanding demand. The Florida Legislature, recognizing that the state alone cannot provide the volume or variety of leisure pursuits that its present and future populations will need, has tasked the Department of Environmental Protection with developing and executing a comprehensive, multipurpose outdoor recreation plan. This Statewide Comprehensive Outdoor Recreation Plan (SCORP) provides the framework for policy planning and implementation. Not only is it a planning tool for public and private recreation interests throughout the state, but it also forms the basis of the statewide and regional supply and demand calculations.

The following information about Florida's pass system was drawn on (November 9, 2005) from <http://www.floridastateparks.org/information/fees.cfm#Policy>.

4.2.3. Passes

The daily entrance fee for Florida state parks ranges from \$4 to \$5 per carload (up to eight people). Pedestrians, bicyclists, and extra passengers in vehicles with an Annual Individual Entrance Permit holder pay \$1 as an entrance fee. The annual pass waives entrance fee charges, but it does not waive any special use fees. Individual passes cost \$40 before tax per year, and family passes cost \$80 before tax per year. The family pass is good for a maximum of eight people in one vehicle. All Florida state parks honor these passes except for Madison Blue Spring, Homosassa Springs State Park, and Sunshine Skyway Fishing Pier, which offer a 33% discount to pass holders. Passes are available online, through a state park, or by mail. Florida state park Annual Passes are good from the day of purchase to the last day of the 13 month calendar. A Pass bought on May 18, 2006, expires after May 31, 2007.

These annual passes allow park admission and all the privileges of the now-discontinued Recreational Use Pass, including after-hours use, without an extra fee. Persons without a pass pay the daily admission fee and applicable daily recreational use fees (e.g., equestrian use, diving, and tubing fees). Everyone except campers must have an annual pass for after-hours park admission in those parks that have after-hours activities, and they must log in at the entrance station. Senior, disabled, and low-income Florida residents get a discount if they can provide proof of their status.

According to officials' rough estimates, the Florida State Parks system sells between 30,000 and 40,000 annual passes per year. For FY 2004 the agency consolidated ten different types of annual passes into two types and increased the price from \$30 to \$40 for individual passes and from \$60 to

\$80 for family passes. Table 15 shows the increase in annual pass-generated revenue between FY 2003 and FY 2004, corresponding to the price change.

Table 15. Florida State Parks' Revenue from Annual Pass Sales

Fiscal Year	Annual Pass Revenue	Park-Generated Revenue	Pass Revenue as a % of Park-Generated Revenue
FY 2000–2001	\$1,054,187	\$28,577,199	4%
FY 2001–2002	\$1,525,027	\$29,893,209	5%
FY 2002–2003	\$1,587,288	\$31,925,406	5%
FY 2003–2004	\$1,907,884	\$32,074,586	6%
FY 2004–2005	\$1,977,499	\$38,273,069	6%

Source: Florida State Parks Office, 2006.

4.3. Massachusetts

4.3.1. Holdings and Visitation

Massachusetts's state park system has 135 units that provide the public with over 3,300 individual and group improved campsites and 20 non-camping overnight facilities. The agency manages 10% of the state's landmass, including 2,000 miles of trails, 27 watersheds, 1,753 buildings, 29 campgrounds, 67 beaches, 39 swimming pools, 39 skating rinks, 2 golf courses, 60 playgrounds, and 55 battlefields. Massachusetts's state parks attracted more than 10 million visitors in 2004.

4.3.2. Operating Budget

Table 16 shows the Massachusetts State Parks revenue from pass sales, including in-state (\$35) and out-of-state (\$45) passes. Out-of-state passes accounted for about 10% to 12% of the total pass revenue in 2004. For the 2005 season, the agency started selling holiday passes in December 2004.

In FY 2005, the Department of Conservation and Recreation spent \$180.2 million in funds from four major sources. Of these, approximately 85% (\$154.1 million) were authorized or appropriated by the Massachusetts Legislature (state funds) and 15% (\$26.1 million) were received in trust from private individuals or corporations, municipalities for dedicated projects, the Massachusetts Water Resources Authority water supply protection programs, the federal government for specified grant programs, and other miscellaneous sources. The agency raised almost 2% of its total revenue from annual pass sales in 2003 and 2004.

Table 16. Massachusetts State Parks' Revenue from Annual Pass Sales

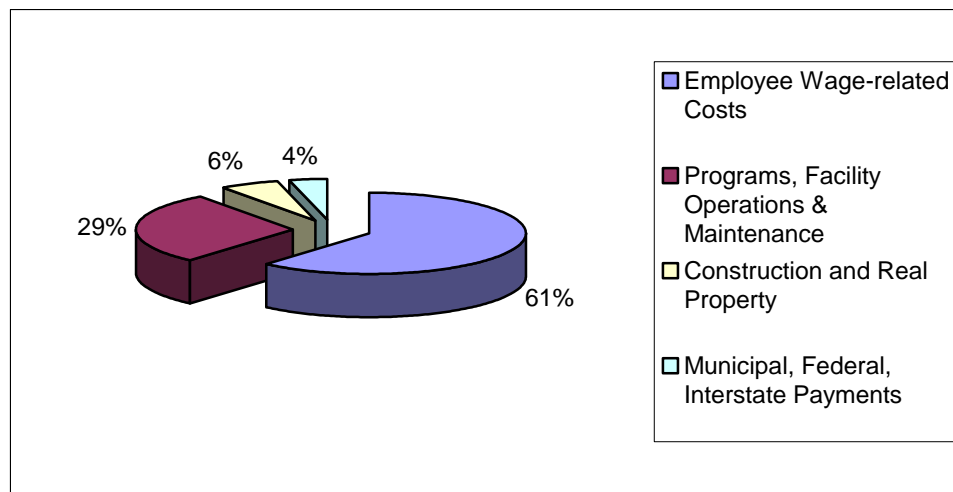
Fiscal Year	Annual Pass Sales Revenue*	Park-Generated Revenue
2003	\$541,938	NA
2004	\$582,137 (26%)	\$2,198,692
2005	\$630,049	NA

*Parenthetical values indicate the revenue's percentage of total Massachusetts State Parks-generated revenues.

Source: Massachusetts State Parks Office, 2005.

Figure 5 confirms that wage-related costs are the state parks division's largest expenditure.

Figure 5. Massachusetts State Parks' Expenditures for FY 2005



Source: Massachusetts State Parks Office, 2005.

The following information about passes is based closely on <http://www.mass.gov/dcr/parkspass.htm>, as accessed on October 29, 2005.

4.3.3. Passes

The Massachusetts state park service requires day or annual passes for all vehicles entering the parks. The cost of day-use passes ranges from \$2 to \$7 per vehicle depending on the facilities. Parking fees range from \$2 at day-use areas to \$5 at inland water areas and \$7 at ocean beaches.

The season pass, called the Massachusetts Parks Pass, costs \$35 for residents and \$45 for non-residents. The season pass provides visitors unlimited day-use parking access to state park facilities under the Department of Conservation and Recreation (DCR). The pass is issued for one vehicle in the form of a hang tag and is valid for one calendar year (January 1 to December 31), regardless of purchase date. Buyers of the 2005 Massachusetts Parks Pass may also purchase an additional vehicle sticker for \$15, which affixes to the hang tag. Buyers of the sticker must provide two vehicle plate numbers. This second car sticker adds a second family vehicle registration number to the Parks Pass. This sticker became available on April 1, 2005, at all locations that sell the Massachusetts Parks Pass.

The Massachusetts Parks Pass applies only to DCR properties outside of the greater Boston area where day-use fees are charged. Some facilities may require a separate parking fee. Additional fees apply for certain activities such as skiing on groomed trails, but no charges apply for day hiking or for snowshoeing. Camping fees range from \$10 to \$15 depending on the services provided. Reservations for campsites cost \$10. The Parks Pass is available by phone, by mail, or at any DCR state park facility that charges daily parking fees.

Weekly passes cost \$5 per vehicle and \$3 per person without a vehicle. Annual passes are also available for a specific park, for \$15. Admission to most public lands administered by the Trustees of Reservations requires either an annual or a day pass. Fees vary among centers, but are generally a few dollars per person. An annual pass to all reservations costs \$40 for an individual or \$60 for a family.

Senior citizens who are 62 or over may request a senior citizen pass that allows free day use for them and those sharing their vehicle. Massachusetts offers no student or military discounts. Disabled patrons displaying a handicapped motor vehicle license plate, a disabled veteran license plate, or a handicapped hang tag placard are admitted without charge.

For a special celebratory event day, the commissioner may declare a day of free admission. This happens about once a year, usually on the opening day in June.

4.4. Oregon

4.4.1. Holdings, Visitation, and Employment

With 180 parks, Oregon's state park system is the third largest in the country. The Oregon Parks and Recreation Department (OPRD) provides the public with over 5,000 individual and group improved campsites and 258 non-camping overnight facilities. Oregon's state parks are among the most popular in the U.S.; their combined day-use and camping attendance of 45.1 million annual visitors (2004) consistently ranks Oregon's parks among the most visited in the nation.

As of June 30, 2005, OPRD operated with 391 full-time, year-round positions—250 in the field, 121 in Salem, and 20 at Reservations Northwest. Each summer (late May through early September), nearly 414 seasonal positions augment the field work force. A total of 26,492 volunteers donated 455,027 hours in 2004. The estimated value of their work was \$7.7 million. In the latest Oregon Population Survey (2004), 91% of Oregonians rated parks and open spaces offered in Oregon as “very” or “somewhat” good.

4.4.2. Operating Budget

According to OPRD (2006), during the budget years of 2003–05 its total revenue of \$146.6 came from various sources. The Oregon Lottery comprised 35% (\$55.4 million) of the total revenue, whereas park user fees (\$33.6 million), RV registration fees (\$17.8 million), federal funds (\$9 million) and ATV revenues (\$9.7 million) respectively comprised 21%, 11%, 6%, and 6% of the total revenue. Other sources contributed \$34.4 million (21%) to the total revenue, sources such as ODOT transfers for roads, rest areas, and salmon plate proceeds; Oregon Marine Board grants; timber sales; miscellaneous permit and sales revenues; interest income; and a beginning biennial balance.

In November 1998, Oregonians passed Ballot Measure 66, which resulted in the constitutional dedication of 7.5% of Oregon Lottery proceeds to the state park system. Of this amount, OPRD ensures that at least \$8 million every two years goes to support outdoor recreation through grants to local governments. \$21 million is to reduce the backlog of facility repairs at state parks and to make other investments in facilities, and \$7 million is available to purchase new state park properties. Remaining lottery revenues help finance OPRD's Heritage Conservation program, which preserves historically significant locations, and other OPRD investments. In addition to lottery proceeds, funding for grant programs comes from the NPS Land and Water Conservation Fund, the Heritage Conservation Fund, RV registration fees, all-terrain vehicle (ATV) gas tax and permits, and the federal Recreational Trails Program.

Table 17 shows that 9% of the total park-generated revenue came from various user fees in 2005. Revenue from two-year day-use passes showed a substantial increase in 2005. In explanation, the

park officials confirmed that the pass was introduced in 2003. Since it is a two-year pass, many pass holders renewed their expired passes in 2005, causing the increase we see in Table 17. Officials expect lower sales in 2006 and another increase in 2007.

Table 17. Oregon State Parks Revenue from User Fees

Item	2004 revenue*	2005 revenue*
<i>Day-Use Fees: Iron Ranger</i>	\$936,963 (6%)	\$748,047 (4%)
<i>Day-Use Fees: Booth</i>	\$509,222 (3%)	\$477,994 (3%)
<i>Annual Day-Use Pass</i>	\$250,693 (2%)	\$259,737 (1%)
<i>Two-Year Day-Use Pass</i>	\$36,700 (0.2%)	\$141,242 (1%)
<i>Annual Extra Vehicle</i>	\$20,090 (0.1%)	\$24,392 (0.1%)
<i>Two-Year Extra Vehicle</i>	\$14,597 (0.1%)	\$17,488 (0.1%)
<i>Coastal Passport Five-Day</i>	\$2,125 (0.01%)	\$2,760 (0.01%)
<i>WORP (WA/OR Rec. Pass)</i>	NA (implemented in 2005)	\$18,264 (0.1%)
Total	\$1,789,937 (12%)	\$1,709,789 (9%)

*Rounded-up parenthetical values indicate the revenue's percentage of total Oregon State Parks-generated revenues.
 Source: Oregon State Parks Office, Salem, OR (2005).

The following information is mainly from http://www.oregon.gov/OPRD/PARKS/dayuse_permit.shtml on November 29, 2005.

4.4.3. Passes

The Oregon state park system contains many day-use parks. Two dozen of these parks charge a day-use parking fee of \$3 to \$5. Annual or bi-annual passes waive the parking fees at all parks. A 12-month pass costs \$25, with a \$5 seasonal discount during December and April. A 24-month pass costs \$40. The annual pass is a windshield sticker that allows up to four individuals to enter the parks. Passes for additional vehicles cost \$5 for 12 months and \$10 for 24 months. One must purchase extra vehicle passes at the time of the original pass purchase. These passes are available at any State Parks office, by phone, or from vendors all over the state. The Oregon State Parks website lists these vendors.

Additional charges apply for camping, boating, and other activities. Registered campers at state parks do not have to purchase a day-use pass; they may simply display their current state park camping receipt on their vehicle's dashboard. Non-campers without an annual pass must buy a daily pass. The daily pass is good for the entire day at a day-use-fee state park, and holders may travel to multiple day-use-fee parks on the same day with the same pass. Most parks have yellow machines near their entrances or parking areas that dispense these passes, but some parks sell them from the park booth or office.

The park system has also housed a Sno-Park program since 1983. The program is seasonal, running from October through April. The Oregon Department of Transportation (ODOT) runs the Sno-Park program, which generally offers permits only at ski resorts rather than at all Sno-Park locations. The Department of Motor Vehicles (DMV) has established two different methods for distributing

Sno-Park permits: 1) contracted agents and 2) appointed vendors. Oregon currently has 28 Sno-Park agents, who must sign agent agreements and be bonded. The DMV pays for credit checks and bonding for applicants who want to become Sno-Park agents.

Until 2000, agents received an inventory of permits without charge in advance of permit sales. At the end of each month, agents remitted a sales report and payment based on permit sales for that month. After a large number of delinquent accounts by the agents in the 1998–1999 seasons, ODOT began charging for the Sno-Park permits before sending them to sales agents. At the end of every season, agents return the unsold permits to ODOT, which reconciles the permit control numbers to the amount recorded on the sales report and reimburses agents for unsold permits.

In contrast to agents, vendors purchase permits directly from the DMV for resale and are not bonded, do not sign an agreement, and do not submit sales reports. The 2000 policy change enabled vendors to collect any commission they wanted from the 2000–2001 seasons' sales. Usually agents and vendors collect a \$0.50 commission for each permit sold. Vendors mail their unused permits to the Vehicle Processing Unit's refund desk for reimbursement. The Sno-Park vendor program works well for the DMV because vendors handle almost the entire permit sales process. In addition, Oregon residents tend to know that rangers patrol Sno-Park areas regularly and issue citations to non-compliant vehicles. This knowledge encourages residents to purchase the permit.

4.5. Texas

4.5.1. Holdings, Visitation, and Employment

The Texas state park system has 118 state parks and 51 wildlife, historical, and fish hatchery units administered by the Texas Parks and Wildlife Department (TPWD), as well as international and migratory waterways. In the Texas-Mexico corridor, the TPWD administers 29 parks and recreational areas, which accounted for 21 million dollars in revenue for the surrounding communities in 2003.

The agency employs over 11,000 individuals, conducted over 13,000 surveys of plants, animals, fish, and people in 2003, and wrote over 4,000 management plans. The Texas state park agency provides the public with over 7,000 individual and group improved campsites and 163 non-camping overnight facilities. Texas state parks attracted almost 10 million visitors in 2004.

4.5.2. Operating Budget

Budget shortfalls have required the TPWD to reduce its workforce and its operating hours at state lands. Additionally, plans are underway to shift the Matagorda State Park to Fish and Wildlife management only; to place Lake Houston State Park under the care of the city of Houston; and charge an additional \$1 entrance fee for the San Jacinto State Park with its tour of the USS Texas battleship.

Table 18. Texas State Parks' Revenue from Annual Pass Sales

Year	Number Sold	Total Revenue*
2000	47,363	\$2,368,150
2001	48,651	\$2,432,550
2002	48,631	\$2,431,530
2003	50,188	\$2,510,129
2004	**58,664	\$3,626,372 (24%)
2005 (through 12/03/2005)	***63,998	\$4,047,934

*Parenthetical value indicates the revenue's percentage of total Texas State Parks-generated revenues.

**Includes 485 gift certificates

***Includes 1309 gift certificates

Source: Texas State Parks Office, 2005.

A 2005 survey showed that total Texas State Parks economic activity (calculated by aggregating the expenditures of all visitors to the state parks) generated an estimated \$793 million in sales (a \$456 million impact on residents' income) and accounted for an estimated 11,928 jobs. Over \$50 million in park-generated revenue (2005) ensures that Texas state parks are properly staffed and well maintained so that visitors can enjoy their natural and cultural treasures.

Information presented above, like the pass information below, is largely based on <http://www.tpwd.state.tx.us/publications/pwdpubs/media/pwd> as accessed between December, 2005 and March, 2006.

4.5.3. Passes

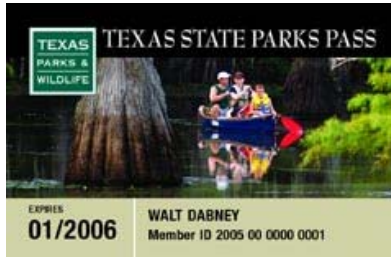
Texas State Parks Pass

The annual Texas State Parks Pass (TSPP) allows purchasers unlimited visits to 118 state parks and historical sites without paying the entrance fees. The pass is valid for 12 months from the time of purchase. Pass holders also receive "members-only" discounts (50% off for camping and a 10% discount at Texas state park stores) on camping, lodging, park store merchandise, and recreational equipment rentals, and they are eligible for promotions such as waived activity fees and free programs. Members can sign up for a customized "Getaway Planner" e-newsletter. The TSPP is available at most state parks and historical sites as well as by phone. One can order a personalized replacement card for \$25.

A one-card membership pass costs \$60, a two-card membership \$75. A second pass card purchased at a later date costs \$25. Each card must bear a separate name, and both holders must reside in the same household. Second cards purchased after original cards bear the same expiration date as the originals. Pass holders may bring as many guests with them as can ride in one non-commercial vehicle. The card holder must be present and may need to show ID. A person entering a state park by boat, by bicycle, or on foot with a valid TSPP may enter the park without paying a per-person daily entrance fee. The pass holder may also bring as many as five additional guests without paying an entry fee if the guests enter the park by the same means as the pass holder.

Before 2004, the Texas Communications Division—Marketing Branch administered the annual state park pass program, and the pass was called the Texas Conservation Passport. In January 2004, the

Texas State Parks Division regained administrative charge of the annual state park pass, a change that increased the revenue from pass sales (see Table 18, above). The State Parks Division sells gift certificates for the annual pass (now the Texas State Parks Pass) that allow the purchaser to pre-pay for a one-card pass and allow the recipient to redeem the pass at any time. The agency also held a holiday promotion in December 2004 and 2005 in which they offered a state park annual ornament, gift box, and card with a gift-certificate purchase.



These cards are issued like credit cards, with the buyer's name printed on them. Initially, the buyers receive temporary wallet cards, but within 45 to 60 days of purchase, they get the cards with their printed names. At the time of purchase, buyers receive a receipt of sale and a Texas State Parks guide book.

The Texas Parklands Passport (also known as the Bluebonnet Pass) is available to senior citizens, disabled veterans, and people with disabilities as outlined in Title 31 of the Texas Administrative Code. The Youth Group Annual Entrance Permit is a special program for youth groups 13–18 years of age. This permit for non-profit youth groups waives entry fees for group members and a reasonable number of accompanying adult sponsors. The annual permit costs \$100 and admits a maximum group of 50 people. The Youth Group Annual Entrance Permit is available at state parks and at the Austin Texas State Parks headquarters.

4.6. Utah

4.6.1. Holdings and Visitation

Utah's state park system has 41 units comprising almost 145,000 acres of land. Utah's state park agency provides the public with over 1,600 individual and group improved campsites and 20 non-camping overnight facilities. Utah's state parks attracted almost 6 million visitors in 2004.

4.6.2. Operating Budget

Table 19 provides statistics on Utah's state park revenue and operating expenses. The table shows a consistent increase in park-generated revenues and operating expenses. Both cost and revenue per visitor have also increased significantly since 2001. The state park agency could not provide any data on annual pass sales and revenue.

Table 19. Utah State Parks' Revenue, Expenses, and Visitor Fees, FY 2001–2005

Description	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005
Park revenue	\$7,929,195	\$8,212,496	\$8,008,828	\$8,188,237	\$9,672,300
Operating expenses	\$22,328,457	\$22,484,189	\$22,158,381	\$22,935,005	\$25,447,525
Visitor fee	\$2.61	\$3.00	\$3.27	\$4.12	\$4.11
Revenue per visitor	\$1.26	\$1.38	\$1.60	\$1.95	\$2.19
Average revenue per park	\$193,400	\$200,300	\$205,400	\$205,400	\$234,267

Source: Utah State Parks Office, Salt Lake City, 2005.

4.6.3. Passes

Utah state parks charge \$5 to \$9 per private motor vehicle with up to eight occupants or \$3 to \$5 per person for pedestrians or bicyclists. These fees permit use of all activity areas in a state park, except areas that carry special charges. Each park requires a minimum fee based on amenities and the group facility's capacity. Group site day-use fees are \$2 per person six years and over. Group camping also costs \$2 to \$3 per person. One independent camp unit consists of one vehicle with up to eight occupants and any attached recreational equipment. Any vehicles in addition to the independent camp unit must pay one-half the full price of a campsite. Commercial vehicles with nine or more occupants pay \$2 per person. Groups from Utah public or parochial schools enter and park for free with advance notice. When the park provides special arrangements or interpretive talks, the park manager may charge a fee of \$0.50 per person. Museum entrance fees vary from \$2 to \$6 per person.

The annual pass costs \$70. It allows the pass holder and up to seven guests in the same vehicle entrance and day-use access to most of Utah's state parks for one year from the month of purchase. Annual park passes waive day-use entrance fees but do not discount overnight camping or golf course fees. Passes are available at state parks, at regional offices, or by phone.

Utah residents 62 years of age or older can either purchase an annual Senior Pass for \$35 or show a Utah driver's license at the entrance gate to receive half off the day-use fee. The Senior Pass is valid for day use only and does not give a discount on camping. The Salt Lake State Parks office and all Utah state parks issue this pass. Disabled veterans and those who meet the Utah State Parks disability qualifications are eligible for a free Special Fun Tag. Only the Salt Lake office can issue Special Fun Tags.

4.7. Virginia

4.7.1. Holdings and Visitation

Virginia's state park system has 44 units comprising more than 60,500 acres of land with more than 450 miles of trails in historical sites, natural areas, and state parks. There are over 1,300 individual and group improved campsites, 202 non-camping overnight facilities, 80 picnic shelters, 23 visitor centers, 19 snack bars, ten swimming beaches, six swimming pools, and two restaurants. The system attracts six to eight million park visitors a year. More than 97% of respondents to the 2000 Virginia Outdoors Survey rated trails as the state park agency's most important offering. The trails provide a range of outdoor experiences in different settings: coastal forests, hardwood forests, hemlock

forests, dunes, tranquil lakes, and spectacular mountains. Trails give visitors opportunities for bird-watching and wildlife viewing, exercise, family outings, and mountain biking.

4.7.2. Operating Budget

Table 20 shows a consistent increase in the Virginia State Parks agency's parking fee revenue; however, this revenue's ratio to the system's total revenue remains constant. The agency could not provide any data on annual pass sales and revenue.

Table 20. Virginia State Parks' Expenditure and Revenue Comparison (FY 2001–2005)

Description	2001	2002	2003	2004	2005
Total Expenditures*	\$19,784,347	\$19,908,941	\$19,572,039	\$21,339,131	\$22,018,665
Total Revenue*	\$7,891,975	\$8,822,413	\$8,867,990	\$9,665,765	\$9,785,802
Parking Fee Revenue	\$1,180,198	\$1,412,087	\$1,392,885	\$1,499,607	\$1,553,581
Parking Fee Revenue as a % of Total Revenue	15%	16%	16%	16%	16%

*The National Association of State Parks Directors (2005a) reports lower figures than this source.

Source: Virginia State Parks Office, 2005.

4.7.3. Passes

Virginia state parks charge \$2 to \$4 per private motor vehicle with up to fifteen occupants for a day pass. The fee permits the use of all day-activity areas in a state park with the exception of any special (Memorial Day, Fourth of July, and Labor Day) or weekend charges. The Virginia State Parks system issues various types of annual passes that waive this entry fee.

Parking passes

- Naturally Yours Passport Plus: This pass costs \$55 and is good for parking and admission to all Virginia state parks for one year. The pass also entitles holders to a 10% discount on camping, state park merchandise, equipment rentals (may not apply to non-park-operated concessions), and shelter and amphitheater rentals. The lifetime version of this pass costs \$275.
- Naturally Yours Parking Passport: This passport costs \$33 and is good for parking and admission at one park of the buyer's choice for one year. One must indicate the park on the application.
- Disability Pass: This pass is free to those with Social Security disability benefits (verification letter required upon application). It allows free vehicle parking and free admission for the pass holder and anyone who needs to assist the pass holder, at parks and facilities with per person admission. This pass is not required for those with a handicapped license plate or decal.

Senior Naturally Yours Passport Plus

This one-year pass costs \$30. It has benefits similar to those described above for the Naturally Yours Passport Plus, which allows parking and admission to all parks, and provides Plus Package amenities (a 10% discount on camping, state park merchandise, equipment rentals, and shelter and amphitheater rentals as well as a Virginia State Parks bumper sticker). The pass without any Plus Package amenities costs \$20. Only those 62 years old or older may purchase it. The lifetime version of this pass costs \$100.

Other passes

- Annual Horse Trailer and Vehicle Pass: \$72 annually; allows parking and horse trailer parking at all state parks.
- Special Horse Trailer and Vehicle Pass: \$33 annually; allows parking and horse trailer parking at Occoneechee and Staunton River state parks.
- Naturally Yours Passport Plus for Boaters: \$138 annually, \$385 lifetime; allows boat launching at all Virginia state parks and provides the benefits described above for the Naturally Yours Passport Plus. A Senior Naturally Yours Passport Plus for Boaters costs \$110 annually or \$285 for life, is good for admission, parking, and boat launching at all Virginia state parks, and provides Plus Package amenities.
- Naturally Yours Park/Launch Passport: \$116 annually; allows boat launching and parking at all Virginia state parks. Unlike the Passport Plus Pass, this pass includes no discounts or other benefits. For people with disabilities, a Handicapped Launch Passport costs \$40 and allows parking and boat launching at any state park (requires handicapped decal or Disability Pass).
- Naturally Yours Park/Launch Passport, First Landing, Kiptopeke, or Lake Anna: \$88 annually; allows boat launching and parking only at First Landing, Kiptopeke, or Lake Anna state parks.

4.8. Wisconsin

4.8.1. Holdings and Visitation

The Wisconsin state park system, officially called the Wisconsin Department of Natural Resources (WDNR), has 95 units comprising 67,600 acres of land. It manages over 970 individual and group campsites and seven non-camping overnight facilities. Wisconsin has 37 state trails totaling 1,607 miles. These trails are open summer and winter for a variety of activities: walking and hiking, bicycling, in-line skating, horseback and all-terrain vehicle riding, snowmobiling, cross-country skiing, and snowshoeing. About 15 million people visit Wisconsin state parks annually.

4.8.2. Operating Budget

User fees and state taxes supply most of the money for operating Wisconsin state parks, forests, and trails. The fees include vehicle admission stickers, state trail passes, and camping fees. The WDNR could not provide any data on annual pass sales and revenue or about their other sources of funding.

4.8.3. Passes

All motor vehicles stopping in state parks and recreation areas must have a vehicle admission sticker. Some state forest and trail parking areas also require a sticker. One can buy either an annual sticker, valid for admission to all state parks and forests for the calendar year, or a daily sticker, valid only on the date of issue. Visitors can also purchase a one-hour sticker at most state parks and forests. All these stickers may be purchased in advance of a park visit.

In addition to a sticker, all people ages 16 and older must have a trail pass for biking, in-line skating, horseback riding, or cross-country skiing on designated trails. Hiking does not require a trail pass. An additional \$5 fee applies to anyone who fails to pay before using the park, trail, or campsite if a self-registration station is available. Table 21 lists Wisconsin's 2005 sticker and trail pass fees. Department of Natural Resources service centers sell annual stickers and trail passes by mail and phone. Some parks, forests, and trails have self-registration stations for fee payment. Businesses near state trails also sell trail passes.

Table 21. Wisconsin Sticker and Trail Pass Fees, 2005

Sticker type	Annual	Half-price*	Day	One-hour
<i>WI resident</i>	\$20	\$10	\$5	\$3
<i>WI resident age 65 or older</i>	\$10	N/A	\$3	\$3
<i>Non-resident</i>	\$30	\$15	\$10	\$3
<i>Bus, WI</i>			\$10	
<i>Bus, out-of-state</i>			\$20	

* Half-price annual stickers are available for additional vehicles registered to the same household address as a full-price annual sticker.

Source: Wisconsin State Parks Office, 2005.

Vehicle admission and trail fees may be waived for authorized public and private school events, groups with mentally or physically disabled persons and their attendants brought by a nonprofit organization whose primary purpose is to improve their mental or physical health, and people on official government business. One can receive such a waiver by completing a Vehicle Permit/Trail Fee Waiver Request form and sending it directly to the property one wishes to access. The property must receive the form at least seven days before the planned activity begins.

4.9. Some Lessons about Passes from These Eight States

Table 22 provides a summary and comparison of some key features of the park systems and passes in the eight states examined in detail above. WYSAC found that, in general, the state park pass systems' goals were (1) to provide a convenient and standardized means of paying fees (mainly entry fees) for a specific set of sites; (2) to cover the costs associated with administering the pass program as well as site development; (3) to provide revenue for project improvements; (4) to reduce cash handling; (4) to provide social benefits for certain population segments; and (5) to create price discrimination and price incentives for specific market segments.

4.9.1. Pricing Policies

At the most general level, policy makers are aware that federal, state, and local park properties have delicate ecosystems and habitats. At the same time, agencies face increasing demands for outdoor recreation. Agencies must strike a critical balance between providing outdoor recreation opportunities and protecting natural resources. A pricing decision should consider all these aspects.

The state park agencies reviewed typically chose pass prices arbitrarily, without undertaking systematic price analyses or visitor surveys before raising or establishing annual pass prices. The ratio of daily to annual pass price ranged widely, from one-third (Wisconsin) to one-twentieth (Florida and Virginia). All of the states except Wisconsin were quite far from the one to three ratio of the typical daily entrance fee at national parks to the price of the \$50 National Parks Pass. The average ratio for these eight states is 0.13, which means that roughly 7.7 visits will allow an annual pass holder to break even financially in visiting state parks.

Table 22. Summary of Annual Park Passes Issued by Eight Selected States

Characteristics	Selected States							
	California	Florida	Massachusetts	Oregon	Texas	Utah	Virginia	Washington
<i>Annual Park Passes</i>	California	Florida	Massachusetts	Oregon	Texas	Utah	Virginia	Washington
Number of people covered	Vehicle	Vehicle (max. 8 people)	Vehicle	Vehicle (max. 4 people)	Vehicle (max. 15 people)	Vehicle	Vehicle (max. 15 people)	Vehicle
Issuing formats	Hang tag		Hang tag	Windshield sticker	Card	Hang tag	Windshield sticker, hang tag, card	Windshield sticker
Price	\$125	\$80	Res. \$35 Non-Res. \$45	\$25	\$60	\$70	\$55	\$55
Ratio of avg. daily pass price to annual pass price	0.06	0.05	0.10	0.12	0.07	0.10	0.05	0.05
Exemptions	Discounts for seniors, physically handicapped; \$3.50 annual pass for veterans	Children under 6 enter free; 50% discount for disabled persons and seniors, 65+	waived for vehicles bearing an HP plate, placard or disabled veteran license plate	free camping and day-use to veterans with a service-connected disability and active military on leave	Discounts for senior citizens and physically handicapped persons	Utah school groups enter free with advance notice	Discounts for seniors; physically handicapped persons are free	Children under 6 enter free; 50% discount for disabled persons and seniors, 65+
Other benefits	Waives state park parking fee	Waives state park entrance fee	Waives state park parking fee	Waives state park entrance fee	Waives state park entrance fee; special discounts at park facilities	Waives state park entrance fee	Waives state park entrance, parking fees; 10% discounts on camping, picnics	Waives state park entrance fee
Number of units	278	159	135	180	120	41	44	44
Park acreage	1,123,947	244,869	54,935	48,745	1,300,000	144,725	60,598	60,598
Annual visitation	82,031,611	19,117,944	10,050,913	45,144,475	9,715,728	5,867,074	6,125,745	6,125,745
Avg. annual visits per park	295,078	120,239	74,451	250,803	80,964	143,099	139,221	139,221
Price of daily pass	\$2–\$14	\$4–\$5/ vehicle or \$1 / person	\$2–\$7 (includes parking)	\$3	\$3–\$5	\$3–\$5/person	\$2–\$4	\$2–\$4
Price of any other pass	Annual Boat Use Pass, \$75; SnoPark Season Pass, \$25	Individual Annual Pass, \$40		2-year pass, \$40; NW Pass, \$85 (\$20 for add-on)			Lifetime Plus Passpt Plus \$275; Parking Passpt \$33	Annual Pass \$15
Gross revenue from passes	\$78,087,000	\$38,273,069	\$2,198,692	\$18,784,912	\$14,898,102	\$8,221,000	\$6,431,769	\$6,431,769
Operating expenses	\$273,834,000	\$71,942,225	\$31,112,703	\$41,416,652	\$51,355,498	\$22,935,000	\$17,143,857	\$17,143,857

Indeed, annual pass sales for several of the states agencies have gotten a boost from increases in the daily-use fee. For example, Oregon increased its state park day-use price while introducing a new price for its annual pass. If an agency charges a \$3 (average) daily entrance and parking fee to enter and park in its state parks, then an annual pass that costs \$30 requires ten visits to break even. But if an agency increases its daily entrance fee at the same time that it increases its annual pass price, purchasers may require fewer visits to make the annual pass financially worthwhile. This fact may increase annual pass sales. The addition of new park sites to the day-use fee program may also increase the value and the sales of an annual pass.

Of course, if high-visitation vehicles and individuals switch from a daily pass to an annual pass, an outcome might be a reduction in total revenue. Following the previous example, imagine that a state had ten visitors. Out of those ten customers, assume that two bought the \$30 annual pass and eight entered with only a \$3 day use pass. If the non-pass holders' average annual frequency of entry was five times each, the total revenue was $[(2 \times \$30) + (8 \times 5 \times \$3)] = \$180$. But with a new price mix, these same visitors may behave differently. Suppose the annual pass is raised to \$36, and the day use pass to \$4. Some visitors may completely stop coming to the parks (e.g., low-income and low-frequency visitors); some may only reduce their frequency of visits; and some (high-frequency but non-pass-holding visitors) may switch to an annual pass (if they plan to visit nine or more times a year). This last category of the customers may also increase their number of visits because they foresee less congestion in parks with the raised day-use fee.

Now assume that one customer completely leaves the market, and three people buy the annual pass. The remaining six visitors have reduced their average number of park visits to two annually after the price increase. In this situation, the total revenue is $[(3 \times \$36) + (6 \times 2 \times \$4)] = \$156$. Under the usual assumptions, agencies can lose revenue even after a price increase. Even if one does not account for the increased daily entrance fees, a reduction in net revenue appears when one considers the cost of higher visitation rates by new pass holders (because now the passes are effectively cheaper).

In short, it is essential to distinguish pass revenues from total revenues, a distinction given detailed attention in the econometric part of the full study.

4.9.2. Marketing

Arc Consulting (1998) concluded that people have low awareness about the annual pass programs for federal lands. All eight state parks studied admit that they also fall short when it comes to advertisement. This perception matches WYSAC's focus group results. Advertising the NRP by mentioning all its attributes could play an important role in increasing demand. All the state agencies agreed that they could improve their emphases on the sale and use of annual passes and other multi-day passes. For example, one suggestion for increasing annual pass sales was to allow residents to purchase their parks passes at a discount when they renew their vehicle licenses.

The consensus, both among state parks officials interviewed and in the focus groups, was that no single marketing change will dramatically increase the sale of annual passes; such an increase will result from a combination of efforts that take into account issues such as the following.

Vendor Sales Program

Oregon's agency successfully implemented the vendor sales program at a fixed commission (\$0.50).

Multi-year and additional vehicle passes

Oregon implemented a two-year annual pass program, which increased its sales. Many focus group participants suggested similar policies. A number of states have an additional-vehicle pass program for multiple vehicles registered to the same household.

Individual and family passes

The Florida park system (like Parks Canada) sells both individual and family passes. Family passes cost two times more than individual passes, give discounts, and allow more than one person in a vehicle. Many participants of the focus groups suggested similar price differentiation.

Multi-agency pass system

Agencies could try to devise a mechanism for multi-state pass systems that cover several states' recreation facilities while providing an equitable revenue distribution.

Expanded amenities with annual passes

Some of the states provide discounts (usually 10%) at park facilities to pass holders. Although most of the agencies have annual passes that only waive entry and parking fees, some states have other pass programs for boat launching, hiking, sno-parking, and other activities.

Discounts

Discounts for senior citizens, disabled citizens, and war veterans are common. The California and Florida state park systems also provide discounts for the low-income groups with the help of the food-stamp program. This was a topic which came up several times in the focus group meetings as well.

Convenience of entry

The agencies agreed that pass holders should get a separate lane while entering the park so that they need not wait in line. An audio cassette-sized transponder on the dashboard (used by the highway system) can clear a vehicle's entry. Florida State Parks has already implemented a "fast pass" system.

Diverse system financing

During 2003–04, California experienced a large revenue fall when the state general fund's contribution was significantly reduced. This reduction compelled the agency to increase its entry fees. To avoid such a scenario, agencies should adopt a set of guiding principles around sources of revenue, ensuring long-term financial stability by proactively pursuing diverse, fair, and sustainable sources of revenue.

Trust

State agencies accepted the fact that people often distrust claims about the distribution of money. The focus groups also revealed a great deal of concern about fee distribution. Some agencies suggested that they might mention fee distribution while advertising the annual passes.

Park accessibility

Fee collection at an entrance station is practical at parks with limited access or few roads. Multiple-road access to a park makes it difficult for an agency to control access, thus making it difficult to charge entrance fees.

Compliance activities

The state park officials generally did not believe that significant revenue gains would accrue from making changes in current compliance activities. They said that providing staffed ticket booths whenever possible is the best way to maximize compliance. Day-use-fee parks should routinely present staff to provide contact with the visitors, increase compliance, and act as information sources. Visitors like to see staff; they add to the visitor's perception that they receive value for their money at parks. Agencies should de-emphasize enforcement during the non-peak season, which implies that enforcement levels should match visitation levels.

Changing demographics

Agencies need to address demographic trends to ensure that all groups receive appropriate access to recreational opportunities in the future. These trends include a steadily increasing population, increasing diversity within the population (both in terms of culture and age), and a gap between the rich and the poor.

Energy conservation

Oregon plans to reduce its use of electricity by retrofitting its existing infrastructure and constructing a new infrastructure according to principles of energy conservation.

5. Other Recreation Passes

Without aiming or claiming to be exhaustive, this benchmarking report will next devote brief attention to some recreational passes that are neither national in scope, like the NPP, GEP, and Parks Canada Discovery Package, nor specific to a state park system. We begin by summarizing a number of regional passes, often involving inter-agency, inter-state, and/or federal-state cooperation. We then cover some passes for other kinds of recreational activities.

5.1. Regional Passes

All of the following information on regional passes was gathered from www.recreation.gov/regionalpasses.cfm, on November 15, 2005.

5.1.1. Adventure Pass

The Adventure Pass is a recreation use pass for the Angeles, Cleveland, Los Padres, and San Bernardino national forests in southern California. Visitors must display the Adventure Pass in their vehicles when parked on national forest land for recreation purposes (picnicking, skiing, hiking, snow-playing, hunting, fishing, etc.). The Adventure Pass is not required to travel through the forests without stopping, to stop for information, or to park at places where a site-specific fee applies.

Annual Adventure Passes cost \$30, whereas the Day Pass costs \$5. Owners of Annual Adventure Passes may purchase one Second-Vehicle Pass, which costs \$5. Annual Adventure

Pass holders must present their original passes to sellers for verification when buying the Second-Vehicle Pass. Expiration dates for both the Annual and Second-Vehicle passes run concurrently, meaning that the Second-Vehicle Pass expires the same month as the original Annual Pass does, no matter when the holder purchases it. Thrifty consumers should buy the annual pass near the first of the month, thereby getting 13 months of use (since the Annual Pass expires at the end of the month of purchase the following year). Also, consumers should consider buying their Second-Vehicle Pass at the same time as their Annual Pass.

Holders of Golden Age and Golden Access Passports no longer receive a 50% discount on the Adventure Pass. This policy change resulted from the implementation of the new National Golden Passport Program. All Golden Passports now cover the basic parking and use fees of the Adventure Pass Program. Owners of these Golden Passports no longer need Adventure Passes. The former promotional package (“Buy a Golden Eagle—Get a Free Annual Adventure Pass”) was discontinued on April 1st, 2003.

Adventure Passes are sold at the forest supervisors’ offices in the four Southern California national forests. In addition, small and large local businesses sell the pass in nearly one hundred communities near the forests. This pass is not sold online, although credit card holders can purchase the pass by phone. This pass is also available by mail or fax.

5.1.2. Joint Rocky Mountain National Park and Arapaho National Recreation Area Pass

The Arapaho National Recreation Area (ANRA) is a congressionally designated region within the Arapaho National Forest in Grand County, Colorado. The ANRA consists of approximately 36,000 acres of water and adjacent lands, including Shadow Mountain Lake, Lake Granby, Monarch Lake, Willow Creek Reservoir, and Meadow Creek Reservoir. This pass covers access to both Rocky Mountain National Park and Arapaho National Forest. The pass costs \$50 a year. The developed campgrounds in the ANRA remain under private concessionaire management and charge separate camping-use fees.

Passes are sold at the forest supervisors’ offices, at Arapaho National Forest, and at Rocky Mountain National Park. This pass is available by mail as well as online from the Public Lands Interpretive Association.

5.1.3. Northwest Forest Pass

The Northwest Forest Pass is a vehicle parking pass that entitles the holder to use many improved trailheads, picnic areas, boat launches, and interpretive sites in national forests throughout Oregon, Washington, and the North Cascades National Park Service Complex. The Annual Northwest Forest Pass costs \$30, and the Day Pass costs \$5. Holders of Golden Eagle, Golden Age, and Golden Access Passports get a 50% discount on the pass. Northwest Forest Passes are available from local Forest Service offices and from local businesses. The pass is available online or by phone.

5.1.4. Oregon-Washington Recreation Pass

This pass covers all entry and day-use fees for federal recreation areas (BLM, USDA-FS, FWS, NPS, and six Corps sites) as well as for state parks and recreation commission parks in Washington and Oregon. It comes as a hang tag honored for a private vehicle entrance at 26 Oregon state parks, 22 Washington state parks, and at federal sites that charge day-use fees for

trailheads, picnic areas, boat launches, some visitor centers, and some park events. This pass costs \$85 a year, and is also available as a \$20 add-on to the existing Golden Eagle Passport. Golden Age and Access Pass holders are not eligible to upgrade their passports. The pass is valid for 12 months from the month of purchase. It may be purchased online, via a toll-free number, or at most USDA-FS offices in Oregon and Washington.

5.1.5. Oregon Coastal Pass

This pass is valid for entrance, day-use, and parking fees for 17 sites between Astoria and Brookings along U.S. Highway 101 that are managed by the state, the USDA-FS, the BLM, or the NPS. It costs \$35 a year. A passport valid for five consecutive days costs \$10. The passes are available at coastal state park and federal agency offices and at local vendors in several coastal communities. Credit card holders may call the State Park Info Center to buy the pass.

5.1.6. Idaho VIP Pass

This pass covers access fees to approximately 100 recreation sites in Idaho that charge vehicle-based, day-use parking, and entry fees. It includes sites managed by Idaho State Parks, the USDA-FS, the BLM, the BOR, and the NPS. The pass costs \$49 a year.

5.1.7. Red Rock Pass Program

The Red Rock Pass Program covers parking in the Red Rock Country National Forest. The Forest Service has partnered with the Sedona-Oak Creek Canyon Chamber of Commerce, Sedona Cultural Park, and the Arizona Natural History Association to provide “one-stop shopping” at four Gateway Visitor Centers. The pass costs \$20 a year.

5.1.8. Chattahoochee-Oconee National Forests Recreation Pass

This pass costs \$25 a year. It covers access to Georgia’s two national forests, the Chattahoochee and the Oconee.

5.1.9. Southwest Pennsylvania Park Pass

This pass covers entry to the Johnstown Flood National Memorial, the Allegheny Portage Railroad National Historic Site, and Fort Necessity National Battlefield for the pass holder and accompanying spouse, children, and parents. The pass costs \$15 a year.

5.2. Annual Passes for Amusement Parks, Zoos, and Museums

Amusement parks, zoos, and museums provide different kinds of annual passes along with different kinds of recreation. We provide a cursory look at some of the more notable entertainment venues which have some similarities with national recreational lands. All the data in this section are taken from the official websites of each venue.

The amusement parks listed in Table 23 have annual passes, and most offer discounts for seniors and children. They may also provide free parking, discounts on food, merchandise, and more. These passes (in most cases) cover no other fees after entering the venue. The passes are widely advertised, and widely available (in nearby hotels, restaurants, general stores). Often, they can be bought on-line with a discount. Most of the passes are valid through the end of the

calendar year (December 31). These amusement parks also provide various ticket packages of multi-day, multi-park passes. Some passes are not valid during certain black-out-dates.

Table 23. Pass Prices of Selected Amusement Parks

Venue	Individual Admission	Annual Pass
Disneyland, CA	\$59 (Ages 3-9 for \$49)	\$349
Disney World, FL	\$63 (Ages 3-9 for \$52)	\$415 (Ages 3-9 for \$365.00)
Universal Studios, FL	\$63 (Child \$52)	\$179.95
Universal Studios, CA	\$49	\$119.00
Cedar Park, OH	\$39.95	\$99.95
Knott's Berry Farm, CA	\$39.95	\$115.00
Dollywood, TN	\$45.70	\$75.00
Legoland, CA	\$54	\$106
Paramount's Kings Dominion, VA	\$49.99	\$99.99
Six Flags Magic Mountain, CA	\$59.99	\$69.99
Sea World, CA	\$54	\$147.00
Wild Adventure, GA	\$34.95	\$89.95
Busch Gardens, VA	\$77	\$279.95
Six Flags Over Texas, TX	\$40	\$80

The pass prices are all higher than the current Golden Eagle and National Parks Pass prices, but individual admissions are also substantially higher than day-use entrance fees on federal lands. The ratio of admission to pass price is about one-half or one-third for most of the venues. Disney properties are a notable exception, with a ratio of one-sixth to one-seventh.

Table 24 provides a similar display for some well known zoos, animal parks, and museums. Here too the prices for these annual passes all exceed the \$50 price of a National Parks Pass, and all but one are more than the \$65 Golden Eagle. However, the daily admission prices are fairly similar to entrance fees for federal lands. Most of the ratios are around one-seventh.

Table 24. Pass Prices of Some Major Zoos and Museums

Venue	Individual Admission	Annual Pass
National Zoo	Free	NA
Denver Zoo	\$10	\$75
Woodland Park Zoo	\$10.50	\$135
Chicago Field Museum	\$12	\$80
Natural History Museum, Los Angeles CA	\$9	\$60
Colonial Williamsburg	\$34	\$75
Denver Museum of Nature & Science	\$10	\$75

6. Implications for Pricing the New Recreation Pass

- In real dollars, adjusted for inflation, both the \$65 Golden Eagle Passport (GEP) and the \$50 National Parks Pass (NPP) are now more than 10% cheaper than they were when the NPP was introduced in the year 2000.
- With pass purchasers averaging three or more entrances per year, these two existing annual passes provide a cost savings (a subsidy) to multi-visit households and a revenue loss (a deficit) to federal land management agencies, relative to the typical day-use entrance fees that are foregone as a result of the passes.
- Parks Canada offers fewer recreational sites than the U.S. National Park Service, and far fewer than all federal land management agencies combined; nevertheless, at about \$140 per year in U.S. dollars, the Canadian pass costs almost triple the price of the NPP, and more than double the price of the GEP.
- No state park system in the U.S. offers the number or variety of outdoor recreational venues available on federal lands; nevertheless, eighteen states have annual passes priced equal to or greater than the NPP, topped by California's pass at \$125 per year.
- Annual passes for nationally known amusement parks, zoos, and museums generally sell for more than the price of the GEP, and some exceed the price of the Parks Canada pass.

In short, from a variety of perspectives the benchmarking results indicate that the price of the New Recreation Pass for federal lands could be substantially higher than the current Golden Eagle Passport. A price of \$100 to \$150 would be in line with the cost of an annual pass for California state parks, Parks Canada, or nationally known amusement parks, zoos, and museums.

To be sure, a low pass price (coupled with an effective marketing campaign) could increase sales of the annual pass. However, those additional sales would likely sacrifice day-use entrance fees, which could result in a net revenue loss.

Conversely, increasing the pass price may lead to fewer pass sales. However, an off-setting increase in day-use entrance fees would be expected. Often, the price for entrance or for a pass is just a small fraction of the total cost of a visit to recreational lands, since the visit may involve substantial expenses for transportation, lodging in transit, camping supplies or other equipment, etc. In addition, some households will buy even a high-priced pass for its convenience, for the economic value it confers on frequent visitors, or for the opportunity it provides to support federal lands.

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Note: In addition to the following references, we collected most of the state park and Parks Canada information from various state park or Parks Canada offices and websites.

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