

TWIN LAKES MASTER PLAN

**ADVISORY COMMITTEE MEETING #3
DECEMBER 8, 2022**

AGENDA

- **PROJECT UPDATE**
- **BASELINE FISCAL ASSESSMENT**
- **MARKET ASSESSMENT**
- **PRELIMINARY ASSUMPTIONS**
- **NEXT STEPS**

TWIN LAKES MASTER PLAN

PROJECT UPDATE

ADVISORY COMMITTEE MEETING #3
OCTOBER 27, 2022

PROJECT PURPOSE

CREATE A GUIDE FOR PREFERRED DEVELOPMENT PATTERNS, PUBLIC AND PRIVATE INVESTMENT AND ENHANCEMENT OF THE TWIN LAKES AREA FOR THE NEXT 10-20 YEARS.

THE PLAN WILL INCLUDE:

- **VISION** ...DEFINING THE FUTURE CHARACTER OF THE TWIN LAKES AREA.
- **GROWTH SCENARIOS** ...TO MEASURE THE IMPACT OF POTENTIAL DEVELOPMENT PATTERNS.
- **FUTURE DEVELOPMENT PLAN** ...TO DEFINE A PREFERRED DEVELOPMENT PATTERN.
- **ACTION PLAN** ...INCLUDING POLICIES, INVESTMENTS, STRATEGIES TO IMPLEMENT YOUR VISION.



TWIN LAKES #1 BOAT LAUNCH

PROJECT TIMELINE (2022/23)

MONTH

AUG

SEPT

OCT

NOV

DEC

JAN

FEB

MAR

APR

MAY/
JUNE

TASK 1: DESCRIBE YOUR CONDITION

Project Administration and Initiation

Pre-Planning and Background Information

Baseline Fiscal Conditions

TASK 2: PUBLIC OUTREACH

Focus Group Meetings

Community Preferences Survey

Public Open House

Advisory Committee Meetings

TASK 3: CONFIRM YOUR VISION

Vision Development

Market Conditions Assessment

TASK 4: CHOOSE YOUR PATH

Growth Scenarios

Preferred Growth Scenario

Future Development Map

TASK 5: DEFINE YOUR FUTURE

Public Policies/Strategies

Public Policies/Strategies

Design Framework

Catalytic Design Projects

TASK 6: SET YOUR AGENDA

Master Plan Work Program

Master Plan Approval

Tentative Schedule - Subject to change

PUBLIC OUTREACH SNAPSHOT

- **VISIONING MEETINGS**

- CITY STAFF
- COMMERCIAL AND RECREATION INTERESTS
- PROPERTY OWNERS
- LEASEHOLDERS

- **PUBLIC OPEN HOUSE**

- HELD ON SEPTEMBER 27, 2022
- 36 ATTENDEES (SIGN IN)
- 3 GENERAL EXERCISES

- **COMMUNITY SURVEY**

- CLOSED, RECEIVED 255 RESPONSES
- WEBSITE, SOCIAL MEDIA BLASTS, OPEN HOUSE

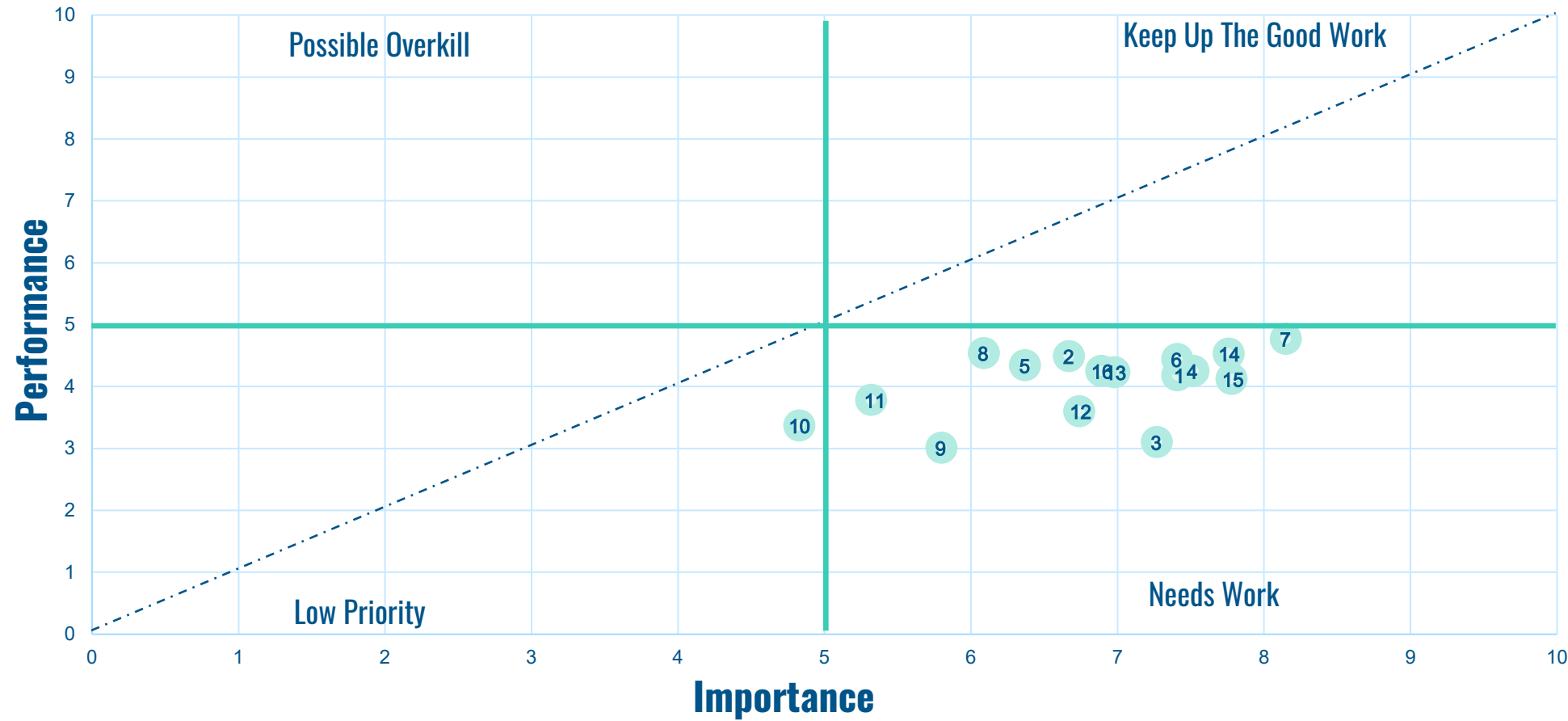


PUBLIC OUTREACH KEY TAKEAWAYS

- IMPROVE **RECREATIONAL OFFERINGS** AT THE TWIN LAKES – MORE THAN JUST BOAT USES; TRAILS, NATURAL AREAS, PICNICKING, DISC GOLF, ETC.
 - DIFFERENTIATE LAKE 1 AND LAKE 2
- IMPROVE PUBLIC SAFETY **AT & ON** TWIN LAKES
 - POLICE PRESENCE
 - FIRE ACCESS
 - CODE ENFORCEMENT
- PROTECT **WATER QUALITY** AND REDUCE **SHORELINE EROSION**
- MAINTAIN **TRANQUIL NATURE** OF TWIN LAKES
- **SMALL-SCALE COMMERCIAL** USES NEAR THE LAKES (CONVENIENCE STORE, FOOD TRUCK, VENDING MACHINES)
- IMPROVE **PERMITTING SYSTEM**
- SUPPORT **SHAWNEE RESIDENTS** ACCESS TO THE LAKES

PERFORMANCE VERSUS IMPORTANCE

1	Park upgrades
2	Boat and kayak ramps
3	Trails (natural or paved)
4	Roadway maintenance
5	Water and sewer expansion
6	Public safety (fire, EMS, police)
7	Water quality protection
8	Wayfinding and directional signage
9	Retail, restaurants, entertainment
10	Arts and cultural amenities
11	Event spaces
12	Increased access for those with special needs
13	Floodplain/stormwater management
14	Land/habitat conservation
15	Erosion control
16	Code enforcement/regulation



S

STRENGTHS

- Peaceful
- Quality Lakes
- Clean
- Great Water-Based Resource (i.e. recreation, relaxing, living)

O

OPPORTUNITIES

- Improve Recreational Offerings
- Enhance Safety & Access
- Provide Small-Scale Commercial
- Proactively Enforce City Codes
- Evaluate Permitting Systems (cost, type, etc.)

A

ASPIRATIONS

- Protect Water Quality
- High Quality Recreational Amenities
- Improved Signage & Local Awareness of the Lakes
- Limit Access and Development on/at Lake 2

R

RESULTS

- Maintaining Water Quality
- Preserving Tranquility
- Providing a Diversity of Uses
- Enhancing Local Ecology

VISION AND GUIDING PRINCIPLES

“THE TWIN LAKES AREA IS AN ESSENTIAL COMMUNITY RESOURCE AND TRANQUIL PUBLIC AMENITY THAT SERVES THE RESIDENTS OF SHAWNEE THROUGH THE PROVISION OF A HIGH-QUALITY AND PROTECTED SUPPLY OF WATER, ACCESS TO NATURAL AND RURAL LANDSCAPES, AND THE AVAILABILITY OF DIVERSE RECREATIONAL AMENITIES THAT SUPPORT THE PASSIVE ENJOYMENT OF THE LAKES AND SURROUNDING PROPERTY.”

1. EMBRACE THE STEWARDSHIP OF OUR NATURAL RESOURCES.
2. PROMOTE FISCALLY RESPONSIBLE GROWTH PATTERNS.
3. PROVIDE BELOVED AND BENEFICIAL RECREATIONAL AMENITIES.
4. FACILITATE THE EFFICIENT DELIVERY OF PUBLIC SERVICES.

TWIN LAKES MASTER PLAN

BASELINE FISCAL ASSESSMENT

ADVISORY COMMITTEE MEETING #3
DECEMBER 8, 2022

THE TWIN LAKES NEXT STEPS

- **PREPARE
GROWTH/DEVELOPMENT
SCENARIO ALTERNATIVES**
- **CREATE FINAL GROWTH SCENARIO**
- **EVALUATE THE FISCAL PERFORMANCE
OF THE FINAL GROWTH SCENARIO**



TWIN LAKES MASTER PLAN

MARKET ASSESSMENT

ADVISORY COMMITTEE MEETING #3
DECEMBER 8, 2022

MARKET CONDITIONS ASSESSMENT: KEY THEMES

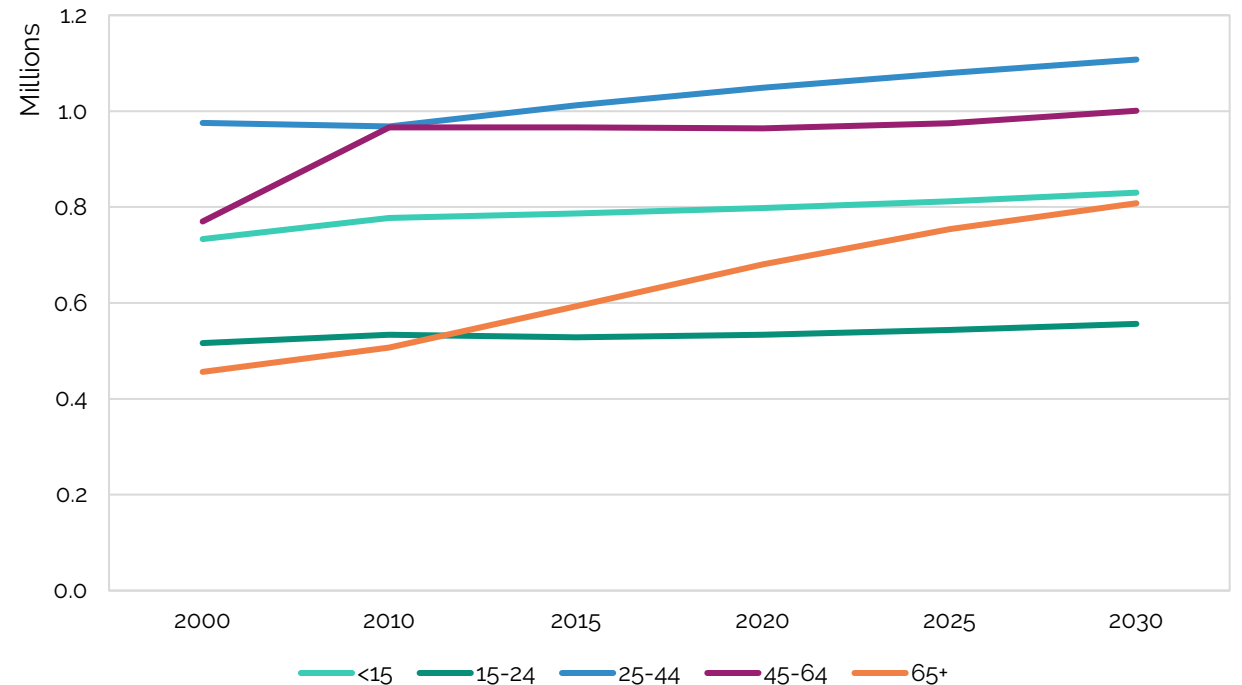


- **NATIONAL CAMPING.** CAMPING HOUSEHOLDS HAVE INCREASED IN RECENT YEARS
- **STATE OUTDOOR RECREATION.** CORE OUTDOOR RECREATION GDP REACHED AROUND \$2.2 BILLION IN 2021 – HIGHER LEVELS OF ACTIVITY THAN 2019
- **LAKES – ORIGIN MARKETS.** APPROXIMATELY 70% OF USERS ORIGINATE FROM UNDER 10 MILES BASED ON DEVICE TRAFFIC. 96% OF USERS LIVE IN OKLAHOMA.

MARKET CONDITIONS ASSESSMENT: DEMOGRAPHICS - AGE

- **STATE.** OVERALL POPULATION EXPECTED TO EXCEED 4.3 MILLION BY 2030
- **25-44.** LARGEST AGE SEGMENT REACHING 1.1 MILLION BY 2030. ABOUT 26% OF THE POPULACE.

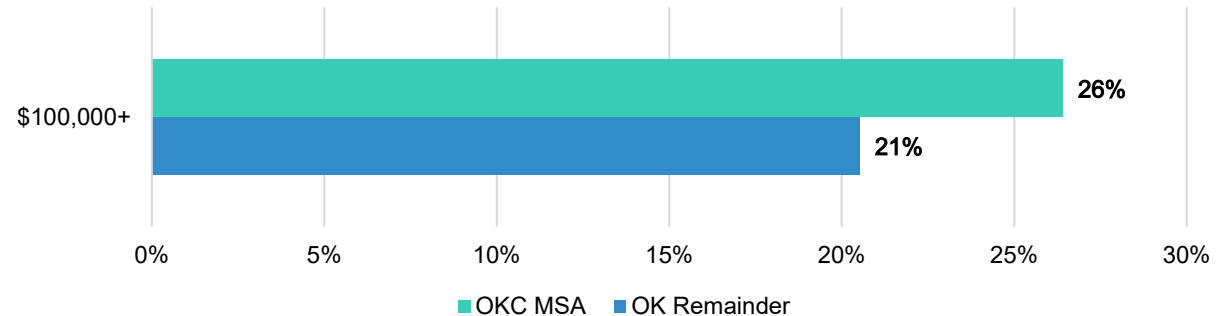
Oklahoma Population Projections



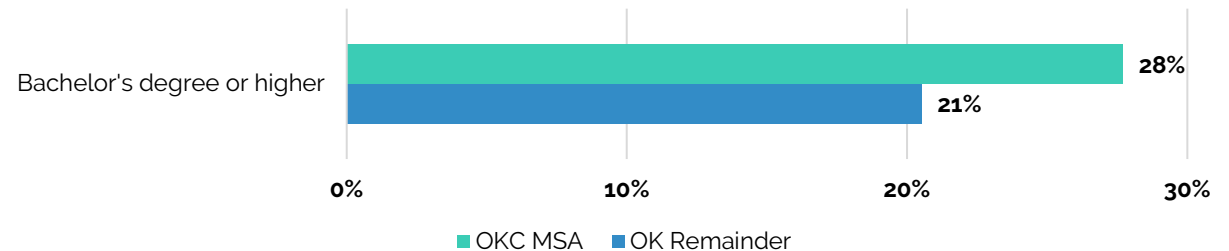
MARKET CONDITIONS ASSESSMENT: DEMOGRAPHICS – INCOME/EDUCATION

- **OKLAHOMA CITY MSA.** LARGER PERCENTAGE OF THE HOUSEHOLDS ARE HIGH INCOME WITH HIGHER RATES OF EDUCATIONAL ATTAINMENT THAN THE REMAINDER OF THE STATE.

High Income Households as a Percent of Population



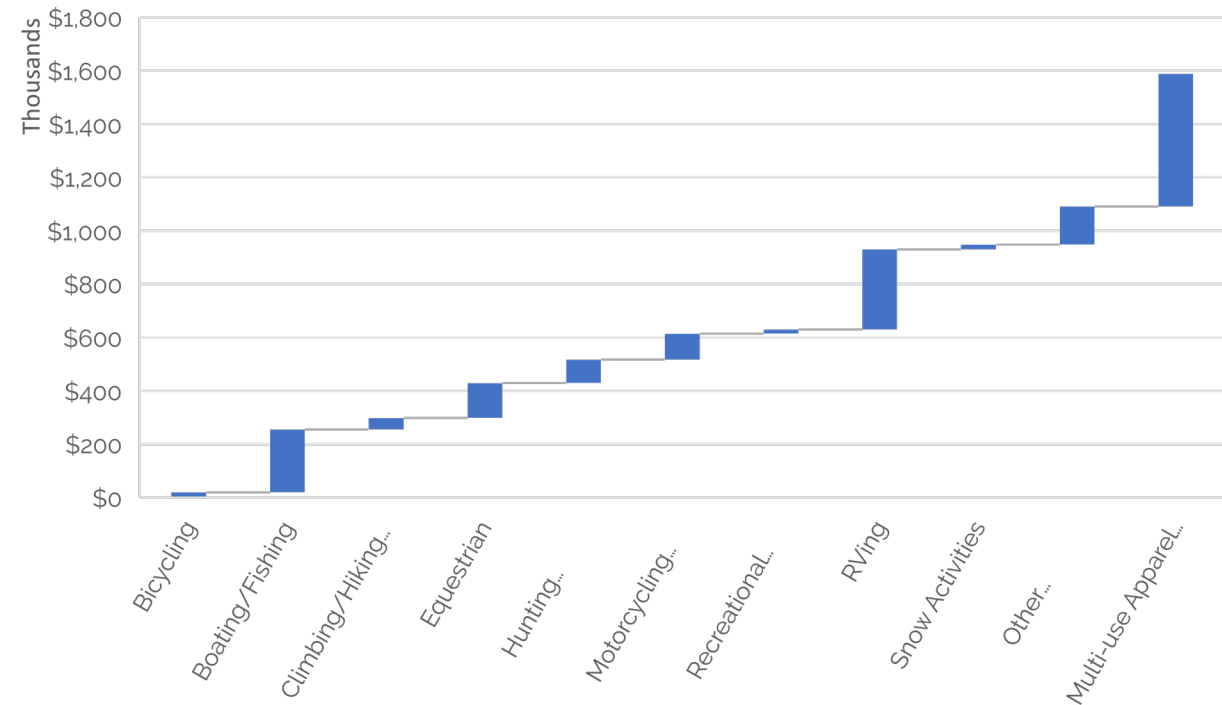
Higher Degree Attainment as a Percent of Population



MARKET CONDITIONS ASSESSMENT: OUTDOOR RECREATION - OKLAHOMA

- **STATE.** CORE OUTDOOR RECREATION GDP REACHED AROUND \$2.2 BILLION IN 2021
- **GROWTH.** THIS CORE ACTIVITY HAS GROWN ON AVERAGE 2.6% PER YEAR SINCE 2012.
- **SIZE.** BOATING/FISHING & RVING MAKE UP APPROXIMATELY 24% OF THE CORE ACTIVITY.

Selected Core Outdoor Recreation by Activity



MARKET CONDITIONS ASSESSMENT: OUTDOOR RECREATION - OKLAHOMA

- **STATE.** BOATING/FISHING IS APPROXIMATELY 15% OF CORE OUTDOOR RECREATION GDP.
- **GROWTH.** CANOEING/KAYAKING & FISHING ARE EXPERIENCING HIGH AVERAGE PER YEAR GROWTH RATES. CANOEING/KAYAKING HAS EXPERIENCED MUCH OF THIS GROWTH IN 2020/2021.

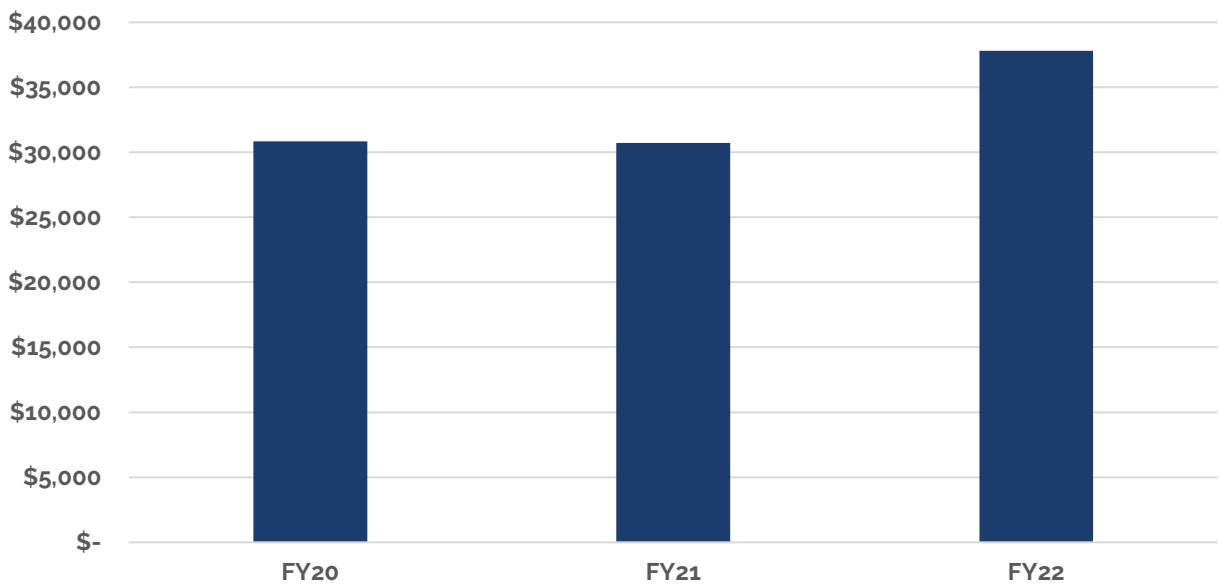
Boating/Fishing	Avg. Growth 10 Years	Share of Activity
Canoeing/Kayaking	8.5%	4%
Fishing (excludes boating)	8.8%	25%
Sailing	0.8%	3%
Other Boating	4.0%	68%

Includes equipment purchases, maintenance, services, insurance.

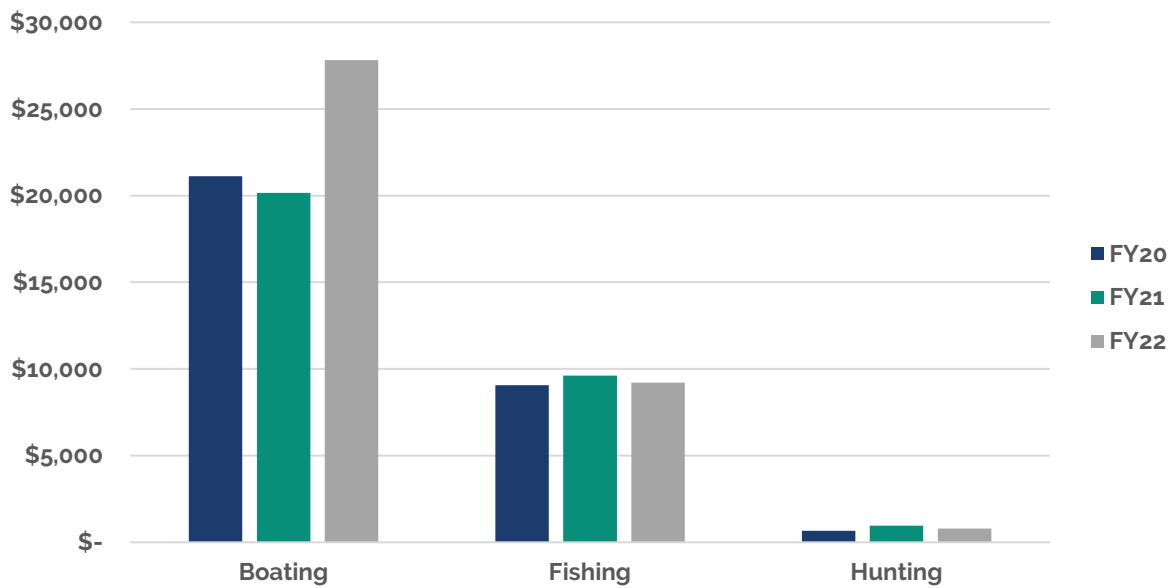
MARKET CONDITIONS ASSESSMENT: PERMITTED ACTIVITY – TWIN LAKES



Total Permit Revenue



Total Permit Revenue by Type



MARKET CONDITIONS ASSESSMENT: PERMIT FEES

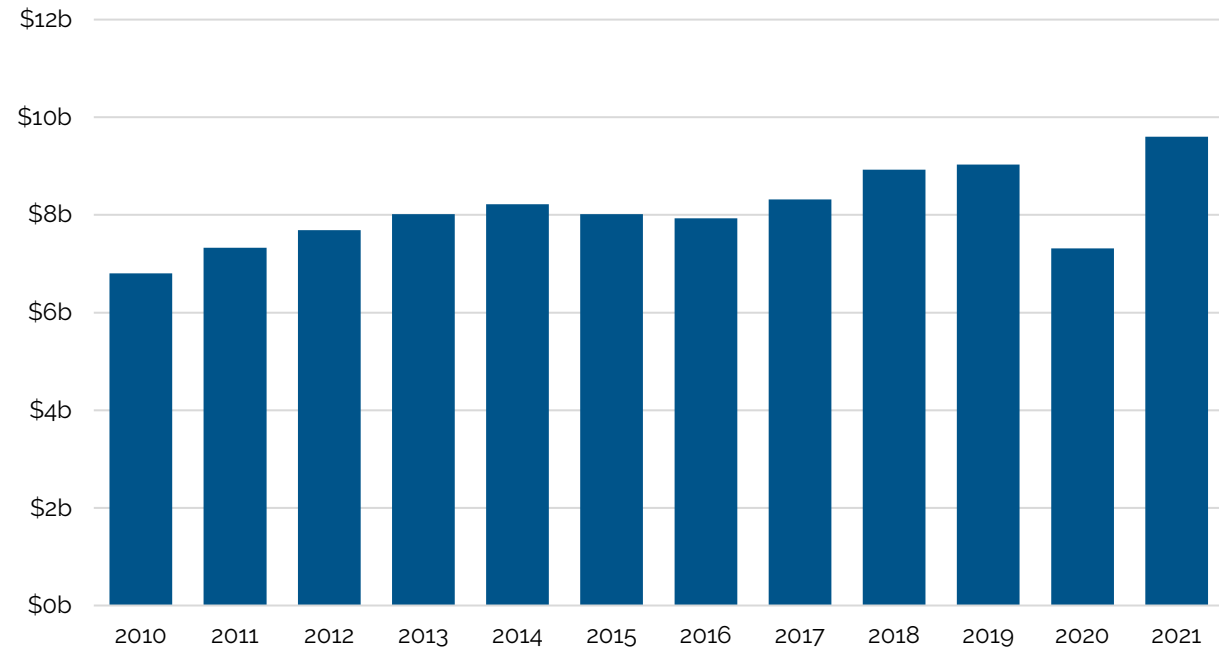
- TWIN LAKES PERMIT FEES ARE COMPARABLE TO SIMILAR REGIONAL LAKES.

Item	Wes Watkins	Twin Lakes	Sportsman Lake
Tent	\$10 / night	\$8 / night	\$8 / night
RV	\$25 / night		\$20 / night
Boating	\$5 / watercraft	\$7 / daily \$30 / annual	\$5 / daily \$25 / annual
Fishing	\$3 / person	\$3 / daily \$20 / annual	Free

MARKET CONDITIONS ASSESSMENT: TRAVEL ACTIVITY - OKLAHOMA

- **STATE.** VISITOR SPENDING ECLIPSED PRIOR HIGHS IN 2021.
- **GROWTH.** VISITOR SPENDING HAS INCREASED AN AVERAGE 2.7% PER YEAR OVER THE LAST 10 YEARS.

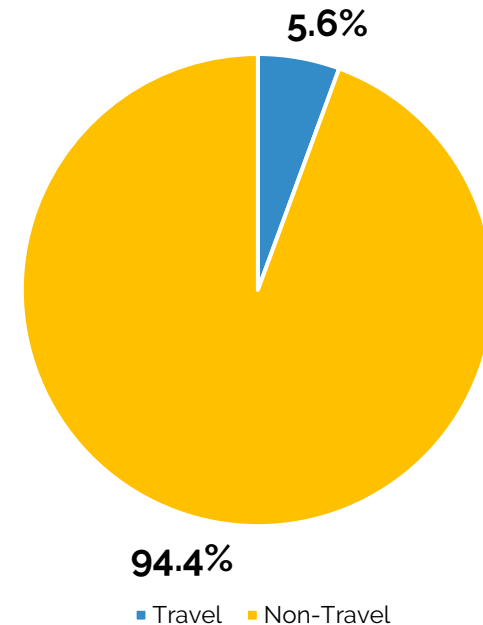
Visitor Spending in Oklahoma (\$Billions)



MARKET CONDITIONS ASSESSMENT: TRAVEL ACTIVITY – POTTAWATOMIE

- **COUNTY.** TRAVEL ACTIVITY CONTRIBUTES APPROXIMATELY 5.6% OF JOBS IN POTTAWATOMIE COUNTY. SLIGHTLY HIGHER THAN THE STATE AVERAGE OF 4.3%.
- **SIZE.** 1,800 JOBS DIRECTLY GENERATED BY TRAVEL ACTIVITY IN THE COUNTY

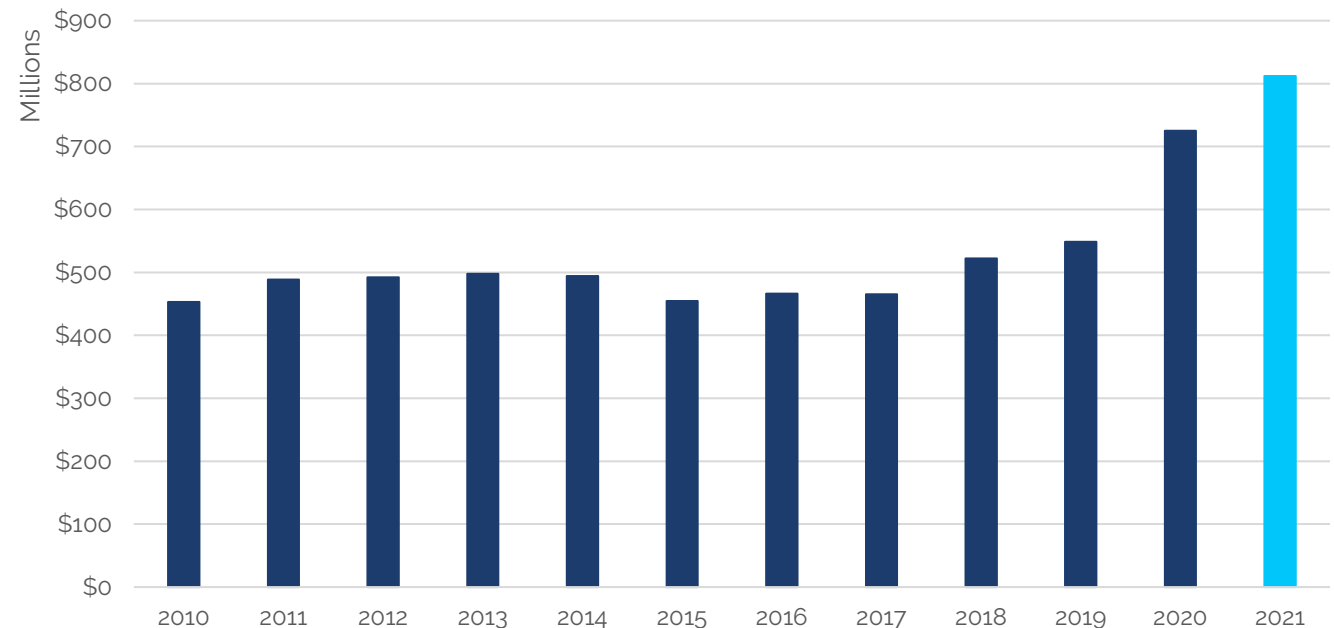
Travel Share of Employment



MARKET CONDITIONS ASSESSMENT: TRAVEL ACTIVITY - OKLAHOMA

- **STATE.** SPENDING BY CAMPERS GREW TO \$812 MILLION IN 2021.
- **GROWTH.** ACTIVITY FROM THESE TRAVELERS DID NOT DECREASE IN 2020 COMPARED TO OTHER TYPES.
- **SIZE.** APPROXIMATELY 8.5% OF STATEWIDE TRAVEL SPENDING ORIGINATES FROM CAMPERS.

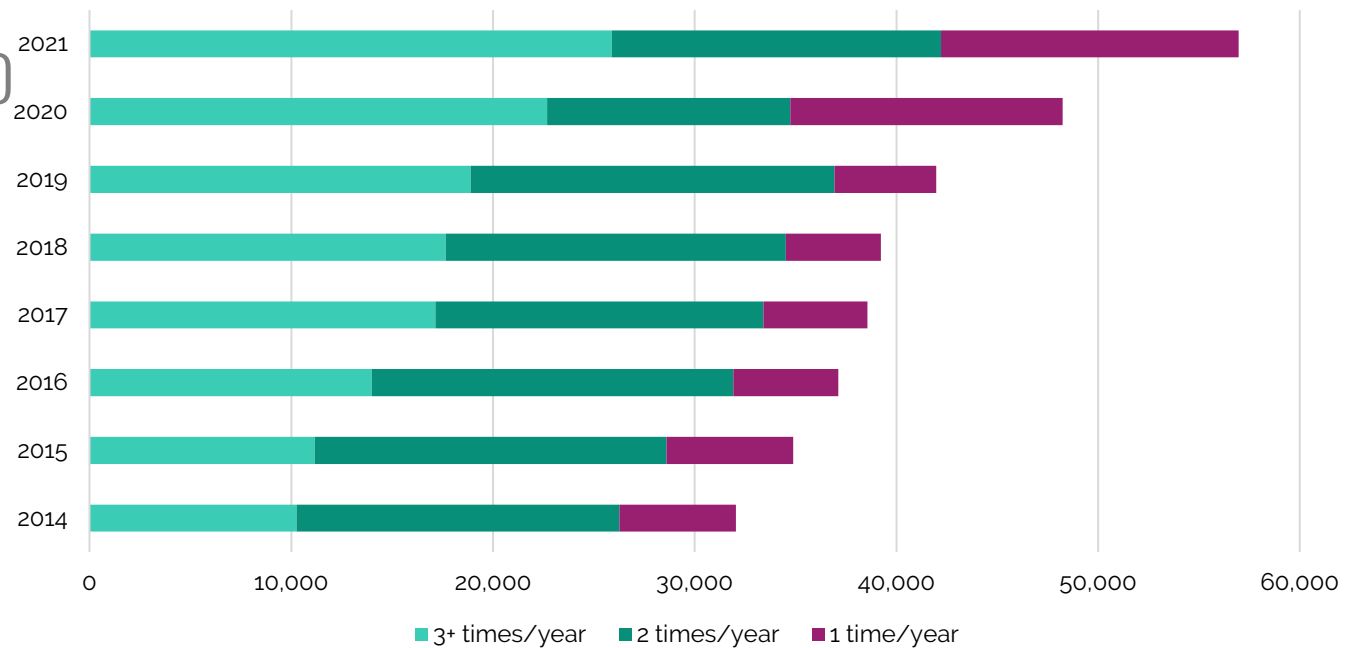
Travel Spending by Campers in Oklahoma



MARKET CONDITIONS ASSESSMENT: NATIONAL TRENDS - CAMPING

- **GROWTH.** NATIONWIDE CAMPING HOUSEHOLDS HAS GROWN SUBSTANTIALLY SINCE 2019. FUELED PRIMARILY BY NEW CAMPERS.
- **AMENITIES.** INDIVIDUALS SEEKING MODERNIZATION LIKE WIFI ACCESS WHEN CAMPING.
- **NEW CAMPERS.** 43% OF NEW CAMPERS PREFER RVING OR CABIN/GLAMPING

Camping Households by Trips per Year (1,000s)



MARKET CONDITIONS ASSESSMENT: REGIONAL OPTIONS

- LAKES OF SIMILAR SIZE
CONTAIN MORE
OPTIONS FOR
OVERNIGHT STAYS

Item	Wes Watkins	Lake Stanley Draper	Sportsman Lake	Isaac Walton
Tent/Primitive	33	32	29	15
RV	29 full		10 full + 30 partial	
Boat Ramps	3	4	3	2
Pavilions	3	2	2	2

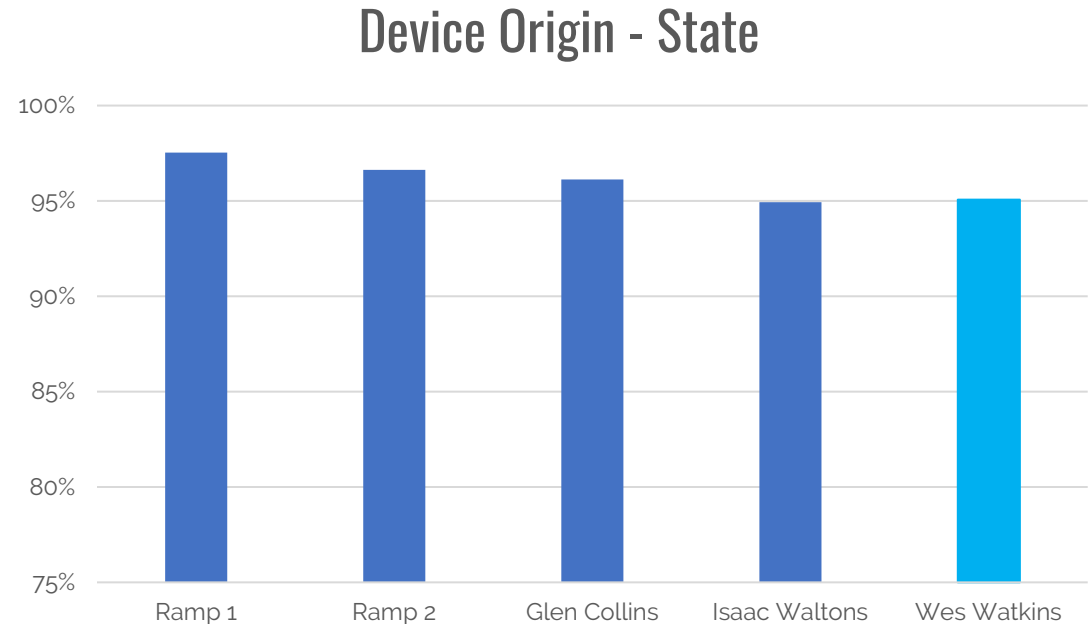
MARKET CONDITIONS ASSESSMENT: PERFORMANCE CHARACTERISTICS

- DIFFERENT OVERNIGHT OPTIONS RESULT IN VARIOUS LEVELS OF PERFORMANCE. THE MORE DEVELOPED THE HIGHER THE OCCUPANCY & RATE

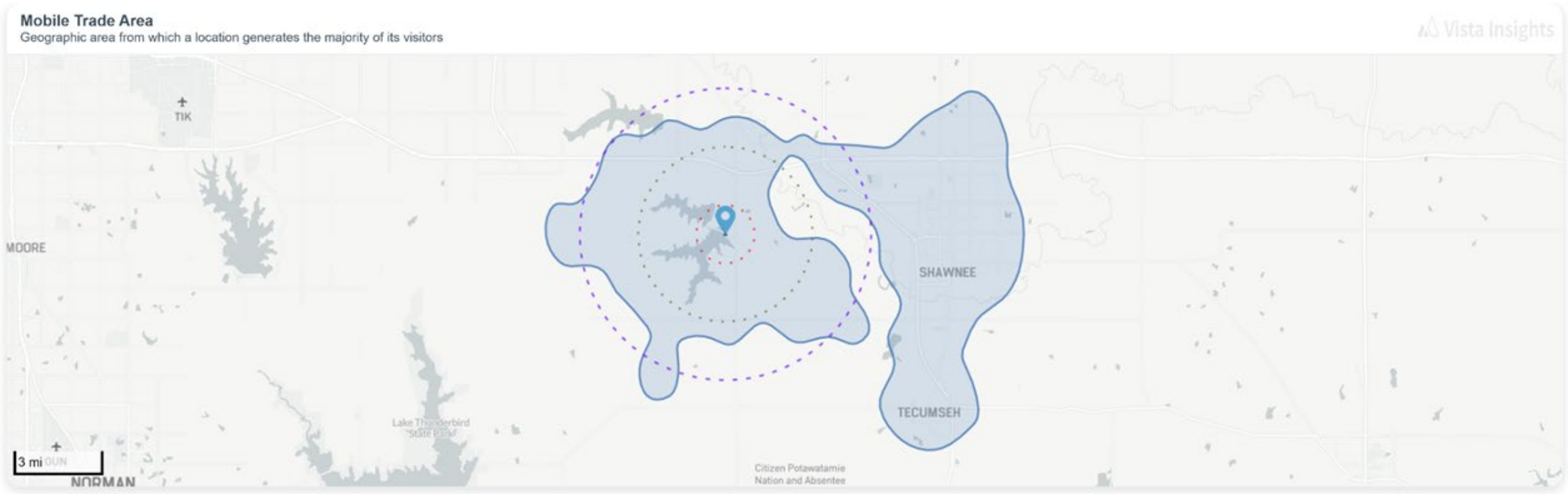
Item	Occupancy	Rate
Tent/Primitive	5-10%	\$15 / Night
RV	20 -30%	\$30 -45/ Night
Yurt	25-35%	\$50 -75 / night
Cabin	30 -40%	\$100 -125 / Night

MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY

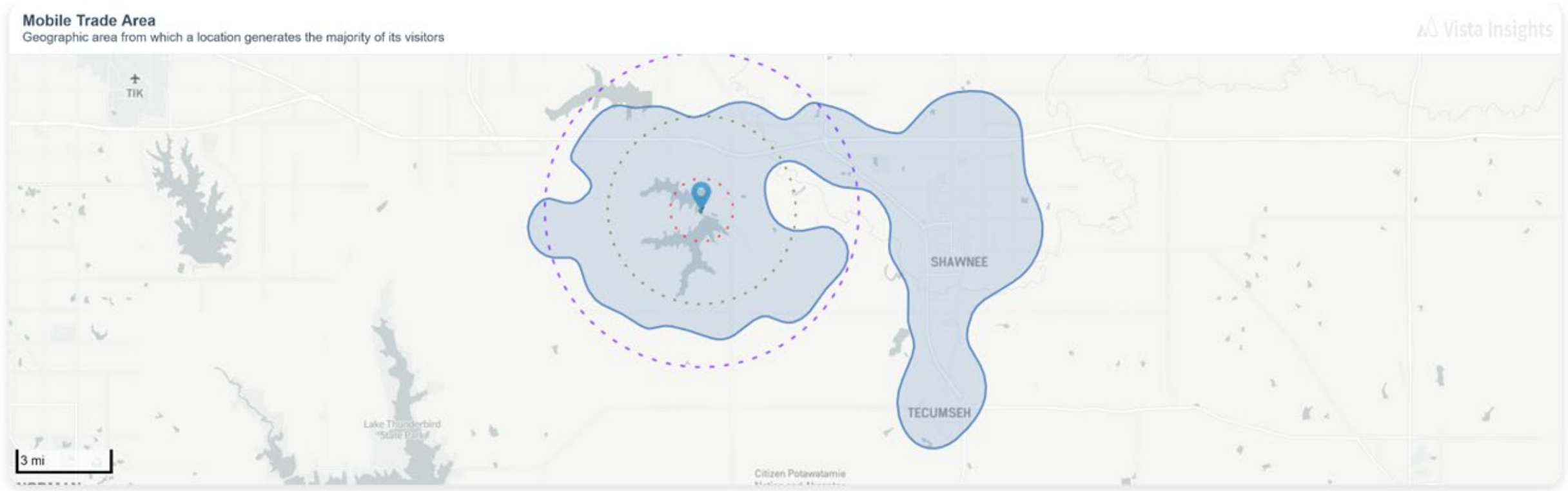
- **LAKES.** OVER 95% OF USERS LIVE IN OKLAHOMA. (WES WATKINS INCLUDED AS COMPARISON)
- **ZIP CODE.** DEVICES FROM 74801 MAKE UP APPROXIMATELY 25% OF TRAFFIC AT THE TWIN LAKES.



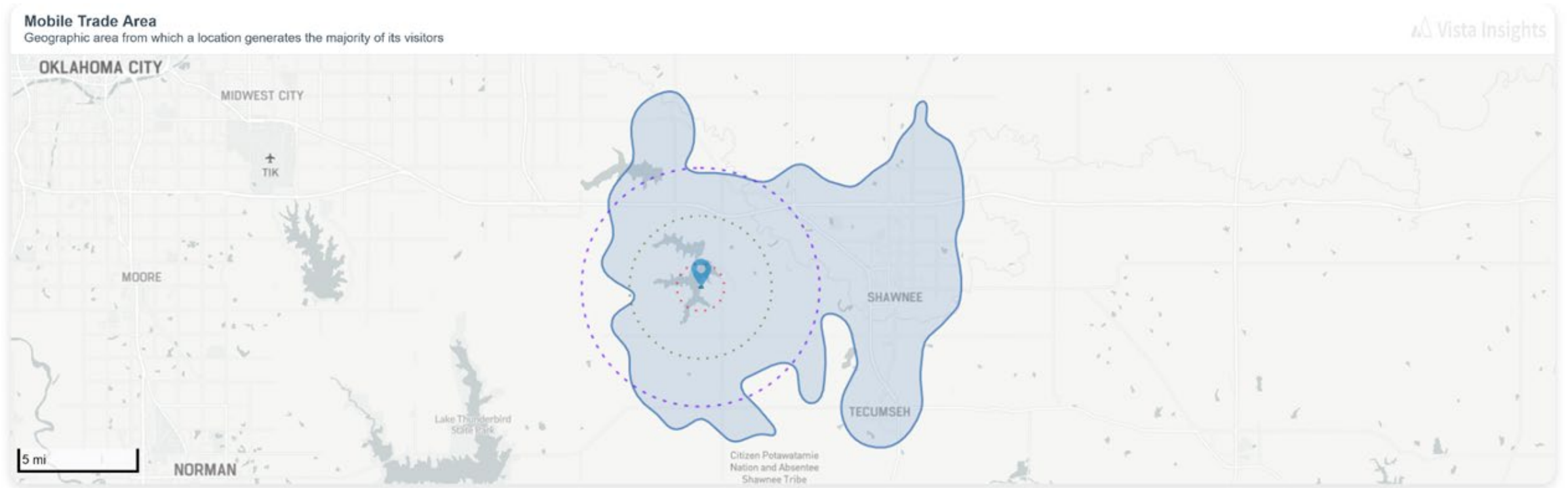
MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY – RAMP 1



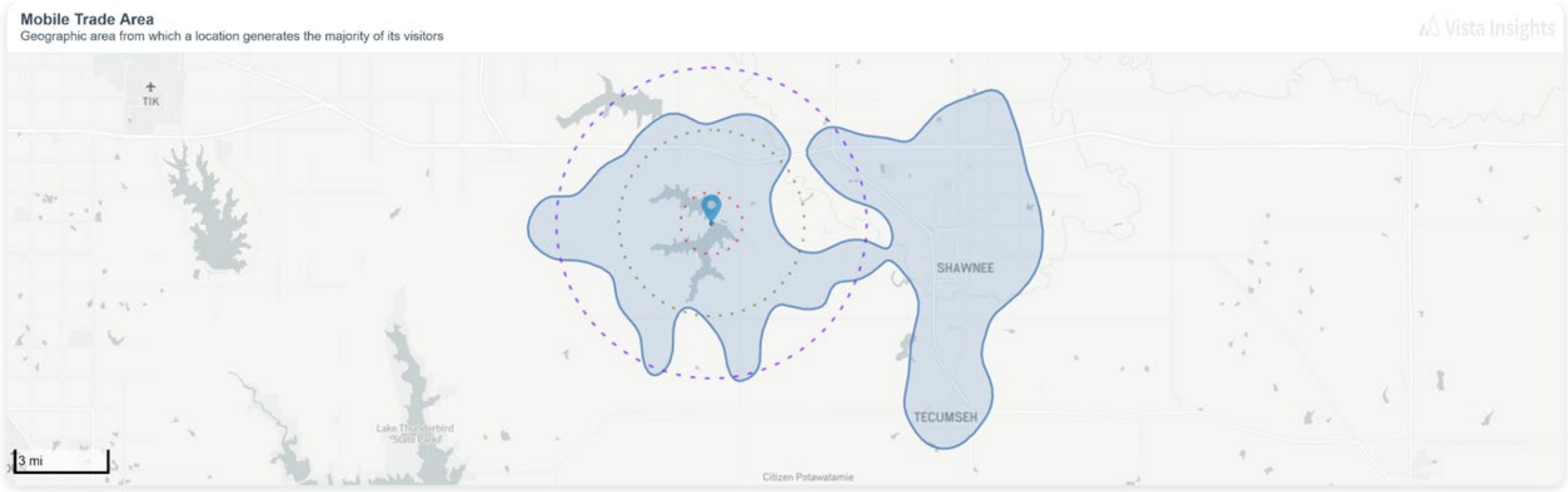
MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY – RAMP 2



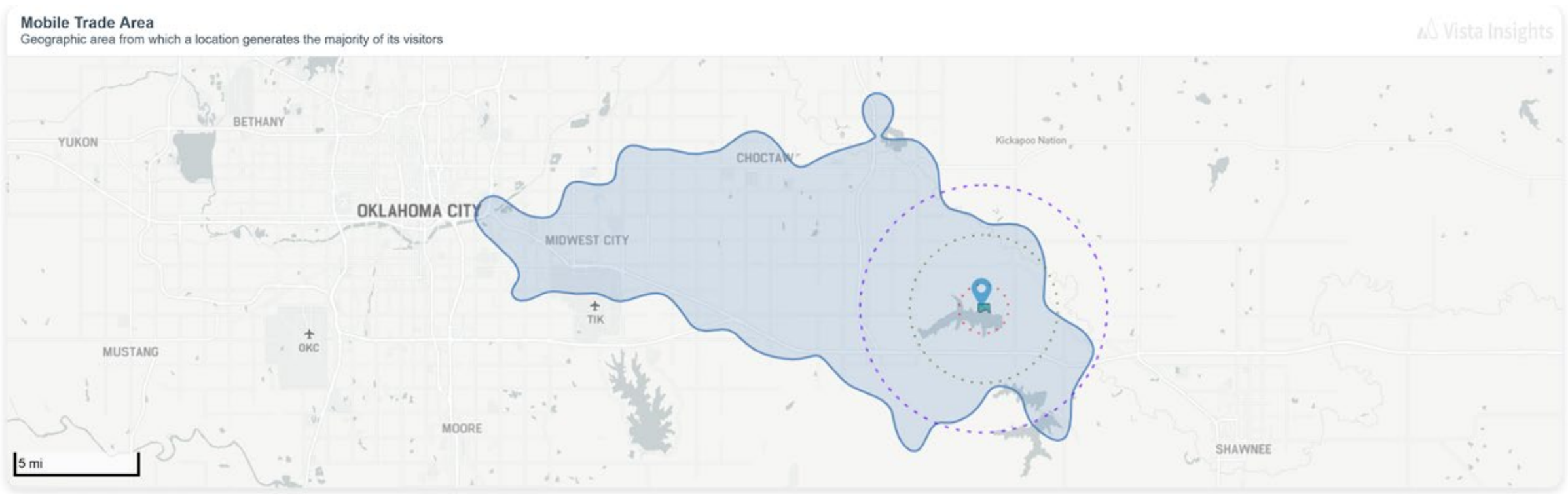
MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY – ISAAC WALTONS PARK



MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY – GLEN COLLINS PARK



MARKET CONDITIONS ASSESSMENT: GEOLOCATION ACTIVITY – WES WATKINS



MARKET CONDITIONS ASSESSMENT: NATIONAL TRAVEL SHARE OF INDUSTRY

- TRAVEL AND TOURISM IS NOT A MAJOR SOURCE OF ECONOMIC ACTIVITY FOR CERTAIN SECTORS. THESE INDUSTRIES RELY HEAVILY ON THE RESIDENT POPULATION BASE

Item	Share Travel/Tourism
Restaurants	14%
Recreation	25%
Retail	3%

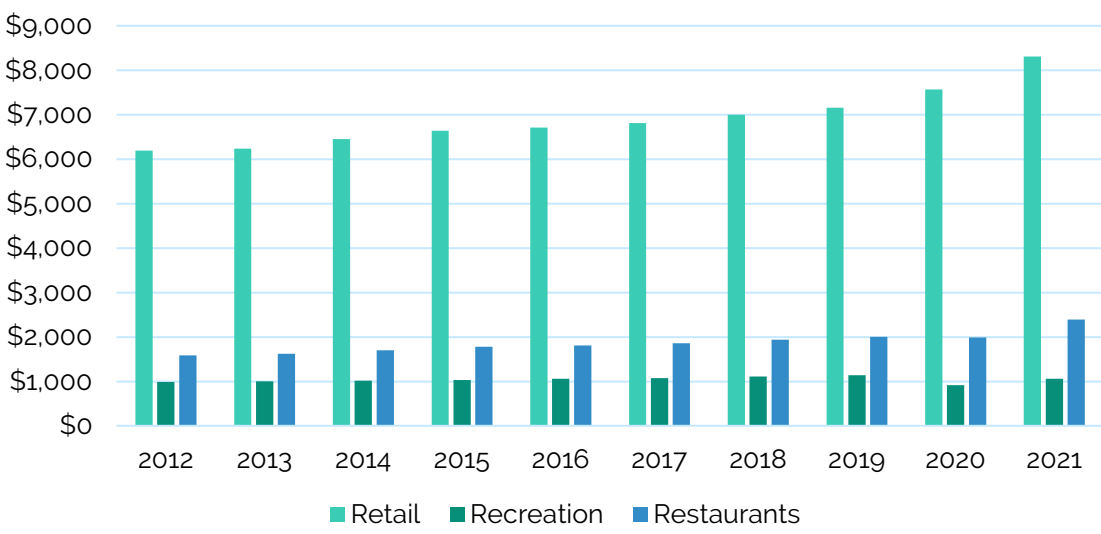
Select industries represented in above table. Travel and tourism covers approximately 27 industry groups. 2019 values listed.

MARKET CONDITIONS ASSESSMENT: SELECTED SERVICES – STATE



- **RETAIL.** PER CAPITA SPENDING GROWING AN AVERAGE OF 3% PER YEAR.
- **RESTAURANTS.** PER CAPITA SPENDING GROWING AN AVERAGE OF 5% PER YEAR.

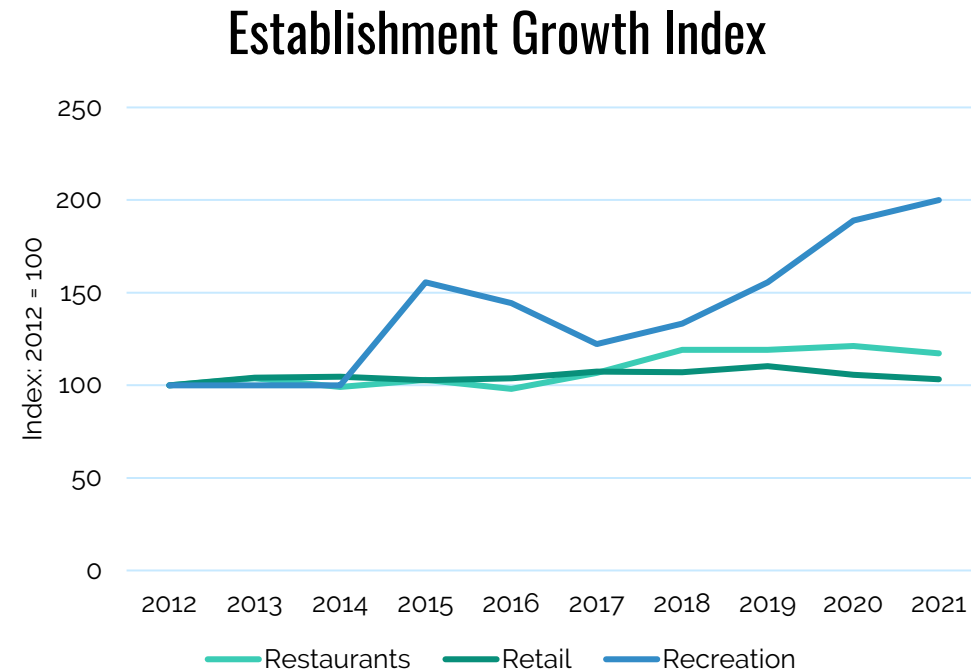
Per Capita Personal Consumption
Expenditures



MARKET CONDITIONS ASSESSMENT: SELECTED SERVICES – COUNTY

- **GROWTH.** RECREATION ESTABLISHMENTS GROWING IN POTTAWATOMIE COUNTY AT A HIGHER RATE THAN OTHER SERVICES.

Item	2021 Establishment Count
Restaurants	122
Recreation	18
Retail	221



MARKET CONDITIONS ASSESSMENT: EXAMPLE AMENITIES OVERNIGHT

- BEYOND AMENITY DEVELOPMENT – ONGOING MAINTENANCE & MODERNIZATION & QUALITY IMPROVEMENTS ARE IMPORTANT LONG TERM CONSIDERATIONS

Item	Considerations
Tent/Primitive	Tent Pad Development
RV	Full Hookups, Pull -throughs
Cabin	Simple or Upscale
All	Spacing, Tree/Ground Cover, Setting (inland, waterfront, etc.), WiFi
Auxiliary	Showers/Restrooms, Laundry, Camp Store, Food Trucks, Electric Car Charging
Management	Park Rangers, On -site staff, Online Reservation System

MARKET CONDITIONS ASSESSMENT: EXAMPLE AMENITIES DAY USE

- BEYOND AMENITY DEVELOPMENT – ONGOING MAINTENANCE & MODERNIZATION & QUALITY IMPROVEMENTS ARE IMPORTANT LONG TERM CONSIDERATIONS

Item	Considerations
Water Oriented	Developed swimming area, slides, non -motorized watercraft rental, fishing gear rentals, pool/hot tub/sauna, marina
Land Oriented	Child play -area, bicycle rental, trail development (paved, ADA accessible, gravel, retaining structure), shore quality development
Event Spaces	Personal: Pavilions (electricity, water, cooking) , Building (electricity, water, restrooms, small kitchen). Performance: Amphitheater (simple or full -stage)
Auxiliary	Showers/Restrooms, Food Trucks, Electric Car Charging
Management	Park Rangers, On -site staff, Online Reservation System

MARKET ASSESSMENT NEXT STEPS

- DETERMINE TYPES OF RECREATIONAL OFFERINGS TO INCLUDE IN THE TWIN LAKES



TWIN LAKES MASTER PLAN

PRELIMINARY ASSUMPTIONS

ADVISORY COMMITTEE MEETING #3
DECEMBER 8, 2022

PRELIMINARY ASSUMPTIONS

- **GROWTH.** LIMIT DENSITIES AND INTENSITIES. THE EXPANSION OF WATER AND SEWER TO ACCOMMODATE HEAVY GROWTH MAY BE INFEASIBLE.
- **LAKES.** LOOK AT USES DIFFERENTLY ON LAKE 1 AND LAKE 2 TO MAINTAIN NATURAL/TRANQUIL NATURE OF THE LAKES AND SUPPORT SHAWNEE RESIDENTS.
- **RECREATION.** CREATE THE “WOW” FACTOR, IMPROVE RESIDENTIAL USE OF THE LAKES. NEED LOCAL SUPPORT AND USE OF FACILITIES. INCLUDE A VARIETY OF RECREATIONAL ELEMENTS FOR EACH LAKE.
- **PUBLIC SERVICES.** EXPAND PUBLIC SERVICES AND ACCESS TO LAKES IN A FISCALLY RESPONSIBLE MANNER.

NEXT STEPS

MEETING #4 – SCENARIO PLANNING WORKSHOP

- DISCUSS 2 ALTERNATIVE GROWTH SCENARIOS
- SCHEDULED FOR JANUARY 11, 2023

MEETING #5 – PREFERRED SCENARIO (VIRTUAL)

- REVIEW PREFERRED GROWTH SCENARIO
- ANTICIPATED IN FEBRUARY, 2023