

Part I

BUSINESS OPPORTUNITY

Food and Beverage and Retail Services

at Mabry Mill

within

Blue Ridge Parkway

National Park Service
Department of the Interior

Concession Contract No. CC-BLRI009-25



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INTRODUCTION

Site Visit

The National Park Service (“Service”) will host a site visit for organizations interested in bidding on this opportunity on the date listed on the Prospectus’ inside front cover. The site visit gives interested organizations an overview of the concession operation along with a tour of some of the Concessioner’s assigned facilities under the Draft Contract. Each interested Offeror is limited to five persons attending the site visit, and all attendees must be over the age of eighteen.

To attend the site visit, registration is required no later than one week in advance of the scheduled date. To register, please contact Laura Nelson, Blue Ridge Parkway Concessions Specialist, at (828) 348-3407 or laura_s_nelson@nps.gov, with the name of the organization you represent, the primary contact for the organization, including contact phone number, mailing address and email address, and the number of people in your party. All parties attending the site visit must disclose to the Service the names of the interested organizations engaging their services. The Service will give further information and additional directions by return email message to the primary contact.

Site visit participants are responsible for obtaining their own lodging, meals, and transportation. Participants are encouraged to obtain lodging as soon as possible, as lodging in the area is limited. Since the concession operation will still be serving visitors at the time of the site visit, no more than two people per organization will be permitted within the kitchen area. Attendance at the site visit is not required in order to submit a proposal for the Prospectus; however, attendance is encouraged.

Notification of Intent to Propose

If you plan to submit a proposal in response to this solicitation, you must notify William Gordon, Commercial Services Management Specialist, NPS Regional Office Serving Interior Region 2, via email at william_gordon@nps.gov no later than 2:00 p.m. Eastern time on August 5, 2024. The Service will not accept proposals from entities that do not provide notice on or before this deadline.

Summary of Term and Conditions of the CC-BLRI009-25 Opportunity

Location

Blue Ridge Parkway

Draft Contract Term

10 Years

Projected Effective Date

January 1, 2025

Required Services

Food and Beverage, Retail

2025 Projected Gross Receipts*

\$600,000 to \$900,000

Estimated Initial Investment

\$320,000

Minimum Franchise Fee

1% of gross receipts

Component Renewal Reserve

2.0% of gross receipts



Information Regarding This Solicitation

The Prospectus describes in general terms the previous business operation and the business opportunity for services allowed pursuant to Concession Contract No. CC-BLRI009-25 ("Draft Contract"). It is comprised of five parts:

- I. Business Opportunity (this document)
- II. Proposal Instructions
- III. Proposal Package
- IV. Draft Concession Contract Including Contract Exhibits
- V. Appendices Table of Contents

This Prospectus includes Service estimates of revenue and expenses to assist Offerors in developing financial projections. These estimates reflect Service assumptions based on planning decisions, historical concession operating data, industry standards, economic conditions, and comparable and competitive operations. The Service does not guarantee these projections will materialize and assumes no liability for their accuracy. Offerors must compile and present their own financial projections based on independent assumptions, due diligence, and industry knowledge.

Offerors must review all sections of this Prospectus, especially the terms and conditions of the Draft Contract, including its exhibits (Part IV), to determine the full scope of a future concessioner's responsibilities. If there is any inconsistency between the Prospectus' terms and the Draft Contract's terms, the Draft Contract will control.

Certain federal laws apply to this solicitation including the National Park Service Concessions Management Improvement Act of 1998 (Title IV, Public Law 105-391, and hereafter referred to as "the 1998 Act"), as amended, and its implementing regulations at 36 C.F.R. Part 51. If there is any inconsistency between the Prospectus' terms and 36 C.F.R. Part 51, 36 C.F.R. Part 51 will control. 36 C.F.R. Part 51 is available at the [Government Printing Office's Electronic Code of Federal Regulations website](https://www.ecfr.gov/current/title-36/chapter-I/part-51)¹.

Parts I, II, and III refer to Blue Ridge Parkway as "the Park" or "the Parkway".

"Concessioner" refers to the entity that will be the concessioner under the Draft Contract.

"Previous Concessioner" refers to Cape Leisure Mabry Mill, LLC, the concessioner under Concession Contract CC-BLRI009-14 ("Previous Contract"). The term of the Previous Contract was from January 1, 2014, to December 31, 2023. A copy of the Prior Contract is included as an Appendix to this Prospectus.

The Service intends to award the Draft Contract around November 1, 2024, or around two months before the anticipated effective date when the Concessioner would commence operations on January 1, 2025. Visitor services were historically open from May through October, and the Concessioner may extend the length of the operating season if desired. The Service intends to announce the selected Offeror around September 1, 2024, or around four months before award. This should give the selected Offeror the opportunity to observe the winterization of facilities before the seasonal closure. Award of a concession contract does not occur until the competitive process has been completed and both the selected Offeror and the Service have signed the concession contract. While the Service will make every effort to meet this schedule, it is subject to change.

¹<https://www.ecfr.gov/current/title-36/chapter-I/part-51>



Proposal Overview

Part II of this Prospectus contains the instructions for submitting proposals. Offerors must carefully read and comply with those instructions.

Part III of this Prospectus contains the proposal package Offerors must complete in its entirety. The proposal package contains a required transmittal letter, five principal selection factors, and two secondary selection factors. Each selection factor identifies the minimum and maximum points the Service may award depending on the quality of the response. The following paraphrases the information sought under each selection factor. The wording of the actual selection factors controls.

Principal Selection Factor 1 requires Offerors to describe how they will protect, conserve, and preserve the resources of the Park. Offerors must describe how they would address maintenance.

Principal Selection Factor 2 requires Offerors to describe how they would improve the visitor experience through improvements and adjustments to food and beverage and retail services.

In Principal Selection Factor 3, Offerors must describe their organizational structure and provide documentation to help the Service understand the Offeror and its relationship to other entities. The Service does not score the first portion of Selection Factor 3 but may use it to understand responses elsewhere in a proposal. Incomplete submissions may lead to a lower score elsewhere if the information submitted does not support claims made in response to specific subfactors in this and other selection factors. The Service provides forms Offerors must complete depending on their organizational structure. The rest of this principal selection factor, which is scored, requires Offerors to describe their experience providing similar services, strategies for employee recruitment and retention, and history of violations or infractions and overall strategy to minimize and resolve them.

In Principal Selection Factor 4, Offerors must submit documentation demonstrating that they have the financial resources to commence and carry-on operations under the Draft Contract, including a business history form. Offerors also must complete the given Excel workbook and provide other information to demonstrate an understanding of the operations under the Draft Contract.

In Principal Selection Factor 5, Offerors state the franchise fee they will pay on gross receipts generated under the Draft Contract. Failure to agree to pay at least the minimum franchise fee set out in this selection factor will result in the Service finding the proposal non-responsive and ineligible for award of the Draft Contract.

Secondary Selection Factor 1 requires Offerors to describe how they would reduce solid waste and minimize environmental impacts of their operations.

Secondary Selection Factor 2 requires Offerors to describe their marketing plan.



Doing Business with the Service

The Service has worked with private parties to offer services to visitors dating back to the earliest times of national parks. Many of the iconic lodges and other structures found in America's national parks were constructed and operated by private parties, and that relationship continues today.

We use the term "commercial visitor services" when generally describing services, benefits, and goods offered to visitors within an area of the National Park System by a third party for a fee. Simply put, the term "commercial visitor services" includes lodging, food and beverage, retail, marina operations, guided recreation, rental of equipment, experiential transportation, and similar services the National Park Service itself does not offer. Congress has passed several laws guiding the Service in contracting with third parties to offer these services, including the 1998 Act. The Service implemented regulations for many aspects of the law, primarily to set out the process for soliciting bids for new contracts and managing concessioners' investment in structures owned by the United States.

Working with the Service in providing commercial visitor services differs from operating outside a park in several respects. By law, we approve rates to ensure park visitors do not pay higher fees for goods and services merely because such transaction occurs within a park. Section 4(B) of the Operating Plan (Exhibit B to the Draft Contract) lists the rate methods for all visitor services. As with the private sector, concessioners must develop and follow environmental management programs, risk management programs, and similar programs to ensure operations comply with applicable laws. Service employees review the quality of concession operations and compliance with contract requirements including the maintenance of facilities.

Even with those regulatory actions, concessioners in national parks enjoy significant benefits. Many parks function as unique visitor destinations. Concessioners frequently operate with few, if any, in-park competitors, even though we do not grant exclusive rights to offer any visitor services. Although we approve rates, our processes ensure the rates are competitive with similar services near the operating locations. Our contract oversight reflects the best management practices of the private sector industries. We developed operating standards based on similar ones in the private sector to reflect best industry practices for the services offered under the concession contracts.

The National Park Service and its Mission

In 1916, President Woodrow Wilson approved legislation creating the National Park Service within the Department of the Interior. That legislation stated that Congress created America's National Park Service to:

...conserve the scenery and the natural and historic objects and the wild life therein, and to provide for the enjoyment of the same in such a manner and by such means as will leave them unimpaired for the enjoyment of future generations. Pub. L. No. 64-235, § 1 (codified at 54 U.S.C. § 100101(a)).

Additionally, Congress has declared that the National Park System should be:

...preserved and managed for the benefit and inspiration of all the people of the United States. Pub. L. No. 91-383, § 1 (codified at 54 U.S.C. § 100101(b)).

The Service has as its overall mission the preservation and public enjoyment of significant aspects of the nation's natural and cultural heritage. To learn more about the Service, visit www.nps.gov. The website includes information about the Service's mission, policies, and information on individual park units.



BLUE RIDGE PARKWAY

In 1936, Congress formally authorized the construction of Blue Ridge Parkway, a designated National Scenic Byway and All-American Road intended to connect Shenandoah National Park to the Great Smoky Mountains National Park. The Parkway, which was built over a period of 52 years, is almost 500 miles long and crosses through the states of North Carolina (NC) and Virginia (VA) along the Blue Ridge mountain range. Land alongside the Parkway is maintained by the Service and, in many places, borders land protected by the United States Forest Service.

The maximum speed limit never surpasses 45 miles per hour with no direct interchanges with interstate highways, making it possible for visitors passing through to leisurely and safely enjoy the passing scenery. The Parkway's varied and scenic environment is designed to showcase the natural beauty and culture of the surrounding area.

From Milepost 0 at Rockfish Gap, VA to Milepost 355 near Mount Mitchell State Park, NC, the Parkway lives up to its name by following the crest of the Blue Ridge Mountains, averaging about 3,000 feet in elevation, and occasionally dipping down into the coves and hollows or crossing low-elevation water gaps. At Mount Mitchell, the Parkway veers westward through the Black Mountains, then into the Craggy Mountains before descending toward Asheville, NC. From there, the road climbs to elevations over 6,000 feet in the Balsam Mountains before entering the Great Smoky Mountains National Park near Cherokee, NC.

Along this route an unsurpassed diversity of climate zones, vegetation zones, physiographic zones, and geological features are traversed. The more than 81,000 acres of Parkway lands pass through a highland area of five degrees longitude and approximately 3 degrees latitude, making it the third largest unit of the National Park Service in terms of area covered. Park resources include 600 streams (150 headwaters), 47 Natural Heritage Areas (areas set aside as national, regional or state examples of exemplary natural communities), a variety of slopes and exposures, and possibly 100 different soil types. The Parkway is a home for both southern species at the lower elevations and northern species on the mountaintops.



Due to the varied topography, weather conditions can vary dramatically. The highest point on the Parkway (Richland Balsam Mountain at Milepost 431) is often closed from November to April due to inclement weather like snow, fog, and even freezing fog from low clouds. A few facilities located on the Parkway are open year-round, although a large majority (like visitor centers, campgrounds and picnic areas) begin opening on a staggered schedule in late April and stay open through the fall leaf color.

Exhibit 1 on the following page presents a map of the Parkway. Additional information about the Park can be found at www.nps.gov/blri.



Exhibit 1. Map of Blue Ridge Parkway



Source: National Park Service



CONCESSION OPPORTUNITY

The Draft Contract requires the Concessioner to provide food and beverage and retail services at Mabry Mill during the operating season from, at minimum, May through October each year. The Concessioner may extend the operating season if desired.

Located at Milepost 176.2, Mabry Mill is one of Blue Ridge Parkway’s most popular visitor attractions due to its rich history and picturesque environment. Facilities at Mabry Mill include the historic gristmill, sawmill and blacksmith shop, which were built shortly after the turn of the 20th century and restored to provide visitors a view of pioneer life in Appalachia. A short trail connects these structures and provides informative exhibits and interpretive displays. Visitor activities at the Mill include demonstrations that showcase old time skills like basket weaving, blacksmithing and apple butter making as well as special events that focus on local music and dancing. The mill has historically been open to the public seven days a week from 8 a.m. to 6 p.m. from May through October.

Directly south of the historic area is the Mabry Mill Restaurant and Gift Shop, which caters not only to those stopping to view the mill, but also to visitors passing by and staying within the area. The Parkway offers a variety of recreational activities in the area that include hiking, camping and picnicking. Nearby towns including Floyd and Meadows of Dan offer many retail and dining opportunities, which are detailed in the Market Overview section of this document.

Draft Contract Term and Effective Date

The Draft Contract has a term of **ten (10) years** with an effective date of January 1, 2025. The Draft Contract’s effective date may change before award if necessary; however, in such event, the Service will change the expiration date of the Draft Contract, if necessary, to provide ten operating seasons.

Required and Authorized Services

The Draft Contract includes the following required and authorized services.

Exhibit 2. Required Services of the Draft Contract

Service	Location
Food and Beverage: Family Casual (10-FBF), Quick Service (10-FBQ) or Fast Casual (10-FBC)	Mabry Mill
Retail: Souvenirs, Gifts and Recreation Specialty	Mabry Mill

Exhibit 3. Authorized Services of the Draft Contract

Service	Location
Vending	Mabry Mill
Hiker Shuttle	Mabry Mill

Overview of Required Services

A summary of each of the required services is provided below. Offerors should reference the Draft Contract and its exhibits for additional information. All minimum operating hours are specified in the Draft Contract Exhibit B Operating Plan in the appropriate section for each service type and location. Rate methods for Food and Beverage and Retail services are summarized below.



Food and Beverage

The Concession operation includes the Mabry Mill Restaurant, which serves country cooking in a casual setting. The Dining Room occupies 800 square feet of space and has seating for up to 65 people. Historical usage trends indicate that peak demand occurs during the morning (breakfast) and early afternoon (lunch) hours.

The Parkway will allow the Concessioner under the Draft Contract flexibility in how and when it provides food service. Food service may be Family Casual, Quick Service, or Fast Casual as defined in NPS Commercial Services Standards.

At a minimum, the restaurant must be open five hours per day, four days per week. The Concessioner may operate during breakfast, lunch, or dinner meal periods.

The Service will approve proposed operating hours yearly. After approval, operating hours will remain fixed for the season unless the Parkway approves changes.



Food and Beverage Prices

Under the Draft Contract, Food and Beverage prices will be subject to Competitive Market Declaration (CMD). Food and Beverage prices may be set based upon market conditions.

The Previous Concessioner's core menu items with 2023 prices are presented in Appendix I to this Prospectus. The Concessioner will have the flexibility to offer food and beverage items different from historical menu items.



Retail

The Concession operation at Mabry Mill also includes a Gift Shop that occupies approximately 800 square feet of retail space in the same building as the Restaurant facility. The Gift Shop sells gifts, souvenirs and prepackaged food and beverages.

The Parkway plans to allow the Concessioner flexibility in opening hours for the Gift Shop. Minimum operating hours are 10:00 a.m. to 2:00 p.m., at least four days per week.

As part of the retail operation, the Concession operation supports interpretive programs at Mabry Mill, including:

- **Sales of Service interpreter made craft items.** On infrequent occasions, Service Interpretive Rangers produce marketable products as part of their interpretive demonstrations. Such products include, but are not limited to, items produced in the blacksmith shop, brooms, and baskets. The Concessioner offers these products for sale in the Gift Shop and provides a portion of the proceeds of the sale to the Service, in accordance with 16 U.S.C. 1a2g. The Concessioner and the Service will agree on this portion of the proceeds, which will represent the cost of the materials used in the demonstration.
- **The Mabry Mill musician program.** On occasion, the Service brings local or regional musicians to perform in the Mill demonstration area. During their performance, the Concessioner is encouraged to offer the featured musician's CD for sale in the Gift Shop. The Concessioner and musician will negotiate this transaction.



Under the Draft Contract, retail prices will be under CMD.



Revenue Assumptions

In developing prospective revenue estimates, the Service assumed changes from historical revenue in part, but not limited to, the following:

- Modified Food and Beverage service (previously Family Casual with table service; now assumed to be Fast Casual or Quick Service with counter service)
- Change from Core Menu pricing to Competitive Market Declaration
- Flexibility to reduce operating hours to close in early afternoon (as early as 2 p.m.)
- Flexibility to reduce operating days to as few as four days per week
- Flexibility to simplify the menu to emphasize speed of service
- Flexibility to expand the retail operation into space currently occupied by food service operations or to expand the food service operation into space currently used for retail.

The Service assumed no utility add-ons in its revenue projections.

Estimated Projections by Department

The following exhibit provides a projected departmental revenues summary for the first operating season under the Draft Contract (2025).

Exhibit 4. Projected Departmental Revenues Summary

Department	2025
Food and Beverage	\$400,000 - \$600,000
Retail	\$200,000 - \$300,000
TOTAL REVENUES	\$600,000 - \$900,000
Less: Deductions*	\$0
GROSS RECEIPTS	\$600,000 - \$900,000

* Authorized deductions (exclusions) are listed in the definition of "gross receipts" in Sec. 2 of the Draft Contract.

The following exhibits provide a breakdown of projections of operating statistics by department.

Exhibit 5. Projected Food and Beverage Operating Statistics

	2025
Mabry Mill Restaurant Transactions	24,000 – 30,000
Average Revenue per Transaction	\$17.50 – \$19.50

Exhibit 6. Projected Retail Operating Statistics

	2025
Mabry Mill Gift Shop Transactions	33,000 - 39,000
Average Revenue per Transaction	\$6.50 - \$8.50



Expense Assumptions

In developing projected expense estimates, the Service assumed adjustments of certain direct, indirect and fixed expenses to reflect costs associated with the changes in operations. The Service projects that most expenses will be within industry average ranges.

Minimum Wage

The Concessioner must comply with all provisions of Executive Order 14026 of April 27, 2021, (Increasing the Minimum Wage for Federal Contractors) and its implementing regulations, including the applicable contract clause, codified at 29 C.F.R. pt. 23, all of which are incorporated by reference into the Draft Contract. The Service considered the implications of these requirements in the analysis of the minimum franchise fee. Offerors must consider the impacts of these requirements when developing their financial projections.

As stated in 29 C.F.R. Part 23, the United States Department of Labor will increase the actual minimum wage for federal contractors during the term of the Draft Contract each year based on the annual change in the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W).

The Federal Contractor Minimum Wage for 2024 is \$17.20. There are no exemptions for tipped workers.

Utilities Expenses

The Service will provide water and wastewater service to the Concessioner. The Concessioner must obtain all other utilities (electricity, solid waste, telephone, propane and fuel oil, and internet) from out-of-park suppliers.

The Service charges utility users (including concessioners) the utility systems' operating and maintenance costs and amortized cost of capital improvements to utility systems. The Service has reviewed projected operating and maintenance costs and amortized costs of capital improvements for these utility systems and services and has developed projected rates. The rate for water and wastewater charged to concessioners in 2024 is \$75.31 per thousand gallons, and the Service estimates the Concessioner will use approximately 300,000 gallons in 2025. The Service has incorporated this rate into its franchise fee calculation and will not approve a utility add-on. Refer to Director's Order #35B (a link to which is included in the Appendices to this Prospectus) for more information on this policy.

Other Operating Considerations

The Service assumes the Concessioner will have flexibility to test different food and beverage service concepts, different operating hours, and different weekly schedules (open and closed days).

The Concessioner will be permitted to provide outside seating in the areas identified in Exhibit D to the Draft Contract.



INVESTMENT ANALYSIS

As shown in the following exhibit, the Concessioner's total estimated required initial investment as projected by the Service is **\$320,000 in 2025 dollars**. This includes personal property, inventory, supplies, start-up costs (staff hiring, training, etc.), and working capital (investment needed to cover expenses incurred in advance of offsetting revenues).

The Concessioner will incur start-up costs before commencing operations under the Draft Contract. Start-up costs include staff hiring, training that may involve compensation in addition to normal wages, systems implementation, legal support services, and marketing and advertising beyond normal annual expenditures.

The Previous Contract does not require the Previous Concessioner to sell and transfer to its successor other property associated with the concession operations. The Service assumes the Concessioner will acquire personal property similar in value to the property owned by the Previous Concessioner.

Exhibit 7. Estimated Initial Investment

Item	Estimated Amount (2025 Dollars)
Initial Personal Property Investment	\$200,000
Inventory Investment	\$50,000
Start-up Costs	\$35,000
Working Capital	\$35,000
Total Initial Investment	\$320,000

In addition to the initial investment, the concessioner must cure Deferred Maintenance over the first two years of the Draft Contract term.

Deferred Maintenance

The Concessioner must cure, within the first two years of the Draft Contract's term, all deferred maintenance ("DM") for all real property assets assigned under the Draft Contract. The Draft Contract requires the Concessioner to maintain buildings according to the Maintenance Plan (Exhibit H to the Draft Contract), which means DM will not accumulate. The Draft Contract lists DM projects in an attachment to the Maintenance Plan.

The following exhibit presents estimated DM costs. The Service has estimated these costs for illustrative purposes only; Offerors must develop their own estimates. In addition, the Concessioner must cure the DM to the Service's satisfaction even if the actual cost total exceeds the estimates provided in this Prospectus.

Exhibit 8. Estimated Deferred Maintenance

Year	Amount
2025	\$34,000
2026	\$34,000
Total	\$68,000



Additionally, the Draft Contract has other financial requirements that are ongoing through the term of the contract, including the following. Your responses in the proposal package should address these items.

Maintenance

Assigned Facilities

The Draft Contract, Exhibit D, Assigned Land and Real Property Improvements (Concession Facilities), contains a complete list and maps of assigned land and real property improvements.

Component Renewal Reserve

The Draft Contract requires the Concessioner to establish a Component Renewal Reserve to ensure funds are available to accomplish certain component renewal and replacement activities. Please see the Draft Contract's Section 10(C) for guidance on the Component Renewal Reserve's terms and conditions. The Service will require the Concessioner to fund the Component Renewal Reserve for the Draft Contract with two percent (2.0%) of gross receipts as defined in Sec. 2 of the Draft Contract. As further explained in the Draft Contract, the Concessioner must expend sufficient additional monies to maintain the Concession Facilities to the Director's satisfaction, which may require the Concessioner to expend more than the amount that it pays into the Component Renewal Reserve.

Minimum Franchise Fee

Offerors must agree to pay the minimum franchise fee, as set out in Principal Selection Factor 5 of the Proposal Package (Part III of this Prospectus), although Offerors may propose higher franchise fees in accordance with terms of the Prospectus.

The following describes the minimum franchise fee acceptable to the Service for each year of the contract term:

1.0% of gross receipts

In determining the minimum franchise fee, the Service, using available industry data, considered the probable value to the Concessioner of the privileges granted by the Draft Contract. This probable value is based upon a reasonable opportunity for net profit in relation to capital invested and the obligations of the contract including anticipated revenues and expenses.

Leasehold Surrender Interest

The Concessioner will be eligible to obtain LSI as outlined in the Draft Contract and Exhibits A ("Leasehold Surrender Interest") and F1 ("Concessioner New Construction and Major Rehabilitation Project Procedures") to the Draft Contract, subject to all requirements within.

No Preferred Offeror

The Director of the Service has determined that no preferred offeror for this Draft Contract exists pursuant to the terms of 36 C.F.R. Part 51. This solicitation for commercial visitor services is fully competitive.



HISTORICAL CONCESSION DATA

This section presents information regarding historical revenue and operating data to assist Offerors in developing projections for future operations associated with the Draft Contract.

Please note that the COVID-19 pandemic and associated closures and restrictions impacted operations during the 2021 operating season.

Historical Financial Information

The following exhibit presents gross revenues by department from 2021 to 2023 for the Previous Contract.

Exhibit 9. Previous Contract BLRI009 – Historical Gross Revenues by Department

	2021	2022	2023
Food and Beverage	\$349,434	\$435,766	\$453,880
Retail	\$218,059	\$235,831	\$284,662
Total	\$567,493	\$671,597	\$738,542

Exhibit 10. Previous Contract BLRI009 – Historical Franchise Fees Paid

	2021	2022	2023
Franchise Fees Paid	\$8,512	\$10,074	\$11,078

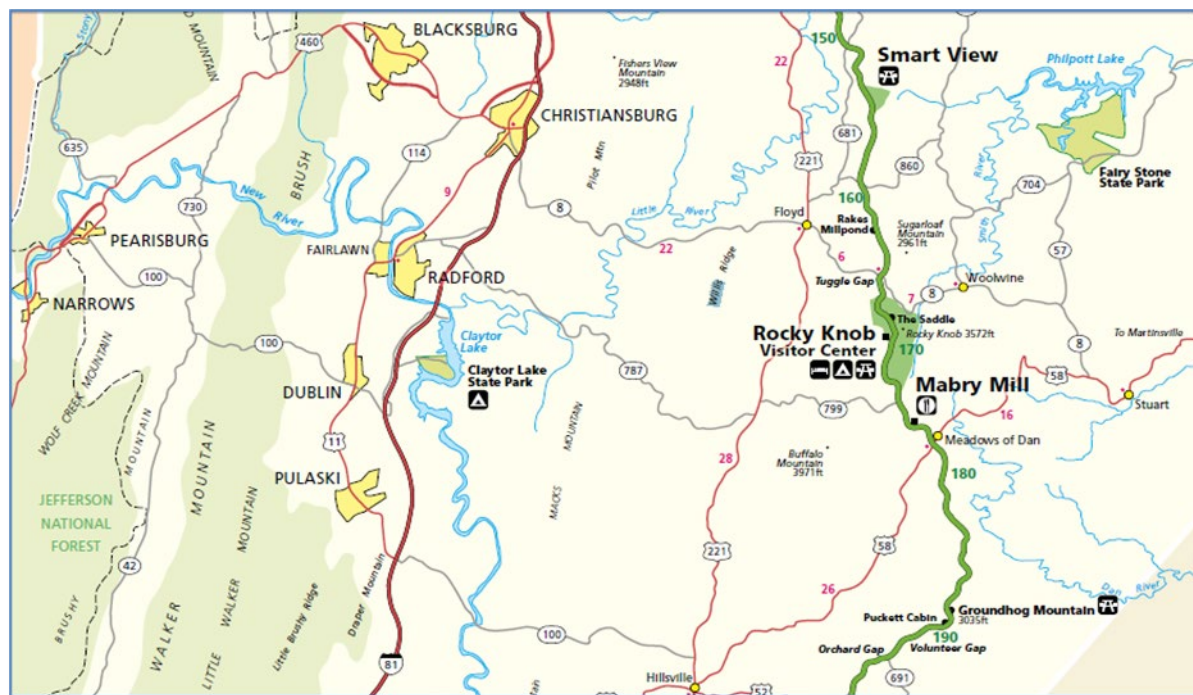


MARKET AREA OVERVIEW

Mabry Mill is located in Floyd County, Virginia. The closest large metropolitan center is Roanoke, which is located approximately 60 miles to the north, and Winston-Salem, NC is about 60 miles to the south. In closer proximity are several smaller cities and communities, which include Meadows of Dan, Floyd, Christiansburg, Radford, Blacksburg, Dublin and Pulaski. The nearby town of Floyd has become a popular destination for tourists seeking Appalachian music and culture.

The map below illustrates the location of Mabry Mill within the surrounding area.

Exhibit 11. Regional Area Map and Location of Concession Facilities



Source: National Park Service

Virginia's Music Heritage Trail, designated the "Crooked Road," crosses over the Blue Ridge Parkway near Mabry Mill. The Crooked Road consists of over 300 miles of interconnected byways and Route 58, which passes through much of the far southwest corner of the state. Several music festivals are held throughout the summer along the Crooked Road, in towns including Floyd, Galax, Marion, and Abingdon. More information is available at <http://thecrookedroadva.com>.

Southwest Virginia is also well known for Appalachian crafts and handiwork. The Heartwood center in Abingdon is a regional center for craft, music, food, and local culture. It is the headquarters for 'Round the Mountain, a network of more than 400 Southwest Virginia artisans and craftspeople. This organization has developed 15 "Artisan Trails" connecting studios, vineyards, galleries and music venues in the area. Two Artisan Trails near Mabry Mill include the Floyd County Trail and the Harmony Trail. More information is available at <http://www.roundthemountain.org>.



Local Competitive Market

Food and Beverage Service

The closest comparable dining alternative to Mabry Mill within the boundaries of the Parkway is the Restaurant at Peaks of Otter Lodge (at Milepost 86). The following table presents a list of several food and beverage outlets within 20 miles of Mabry Mill.

Exhibit 12. Food and Beverage Services near Mabry Mill

Restaurant Name	Description	Location
Jane's Country Café	Regional specialties	Meadows of Dan, VA
Primitive Coffee	Coffee shop, baked goods	Meadows of Dan, VA
Longfin Grill	Fish entrees, burgers, BBQ	Meadows of Dan, VA
Crossroads Café	Sandwich shop	Stuart, VA
Chateau Morisette Restaurant	Winery, elevated Southern	Off Blue Ridge Parkway (Floyd)
Jim's Grill	Burgers, subs, chicken	Willis, VA
Dino's Restaurant	Salads, sandwiches, subs	Willis, VA
Tuggles Gap Roadside Inn	Breakfast, sandwiches, wraps	Tuggle's Gap, VA
Maples Restaurant at Olde Mill	Regional specialties	Laurel Fork, VA
Crooked Oak Restaurant	Breakfast, sandwiches, salads	Hillsville, VA
Parkway Grill	Breakfast, sandwiches, dinner	Floyd, VA
Floyd Country Store Café	Salads, sandwiches, soups	Floyd, VA
Blue Ridge Diner	Breakfast, sandwiches, lunch	Floyd, VA
Pickle & Ash Restaurant	Locally-sourced specialties	Stuart, VA

Source: Consultant

Retail Service

Similar to food and beverage, the closest alternative retail services to Mabry Mill within the boundaries of the Parkway are at Peaks of Otter Lodge. Retail services at Peaks of Otter include a gift shop that sells souvenirs, apparel, and artisanal crafts as well as a country store and the Sharp Top store. Several small communities in close proximity to Mabry Mill offer a range of retail alternatives.

Exhibit 13. Retail Services near Mabry Mill

Restaurant Name	Description	Location
Concord Corner Store	Gifts, clothing, unique items	Meadows of Dan, VA
Poppy's	Gifts, yarn, crafts	Meadows of Dan, VA
Poor Farmer's Market	Sandwiches, snacks, market	Meadows of Dan, VA
Nancy's Candy Company	Candy, chocolate	Meadows of Dan, VA
Floyd Country Store	Gifts, souvenirs, music, food	Floyd, VA
The Station	Crafts, farmers market, gallery	Floyd, VA

Source: Consultant



Blue Ridge Parkway Visitation

Blue Ridge Parkway visitation numbers are among the highest in the National Park system and are based on a variety of counting procedures and formulas, including numerous traffic count locations along the entire Parkway. Between 2013 and 2023, Parkway recreation visitation increased at an average annual rate of 2.6%. Park visitation was only modestly impacted at the start of the COVID-19 pandemic, with visitation declining by roughly 6% in that year. However, visitation rebounded significantly in 2021 to 15.9 million visitors, an increase of 13.1% over 2020 visitation. Visitation set a new record in 2023 at approximately 16.7 million visitors, 6.1% higher than in 2022.

Exhibit 14. Blue Ridge Parkway Recreation Visitation

Year	Recreation Visitors	Percentage Change
2013	12,877,368	-
2014	13,941,749	8.3%
2015	15,054,603	8.0%
2016	15,175,578	0.8%
2017	16,093,765	6.1%
2018	14,690,418	-8.7%
2019	14,976,085	1.9%
2020	14,099,485	-5.9%
2021	15,948,148	13.1%
2022	15,711,004	-1.5%
2023	16,667,164	6.1%





-- END Part I: Business Opportunity --

