I. Introduction

The local comparables report for the Washington, DC tour transportation market provides an overview of comparable services to the visitor tour transportation services currently offered by the National Park Service (NPS) through a concession contract with Landmark Services Tourmobile, Inc. (Tourmobile). The purpose of the local comparables report is to inform the decision-making process of the NPS in shaping future visitor transportation service(s) for the Memorial Core and other Washington, DC area NPS resources. The report is not an evaluation of either the currently provided services of Tourmobile or services provided by any other operator, nor does the report make service recommendations.

The overall tour transportation market for the Washington, DC metropolitan area is summarized using a range of local and national sources. The report includes an overview of the characteristics of the local tour transportation market: types of tour services offered, tour operators and visitor characteristics. Many Washington, DC area agencies and national tour industry agencies have identified data gaps in visitor and tour market data; however, a discussion of the available data sets and data limitations is included in Appendix C of this report.

The report covers three tiers of comparability to the existing Tourmobile service:

1. Primary Comparable, service of the same price range and equivalent service offerings;
2. Approximate Comparable, service of an adjacent price range and similar service offerings; and
3. Least Comparable, service of an exceptionally different price range and/or offering services of a different nature but still within the family of tour transportation.

Individual documentation of Washington, DC tour transportation operators is presented including, where available, service and operational characteristics, estimated ridership information and cost of service. All data collected for this report is analogous to data collected for other NPS Alternative Transportation studies and is intended to supplement that data to provide the Washington, DC area parks a more broad perspective on the existing visitor transportation markets and services.

A. Visitor Market

Travel and tourism was estimated to be a nearly $10 billion industry in Washington, DC in 2001.[1] Approximately 17.6 million domestic visitors and another 1 million

[1] "The Role of Travel and Tourism in America's Top 100 Metropolitan Areas," The U.S. Conference of Mayors, The Travel Business Roundtable and the International Association of Convention and Visitors Bureaus, October 2002, p.3.

international visitors came to Washington DC in 2002.[2] The goal of the Alternative Transportation Study for the Washington, DC area is to plan for future visitor transportation services in the most open and informed manner and in so doing provide the best and most appropriate service for future visitors. Understanding the visitor market and the existing tour transportation market serving more than 18 million visitors per year to the greatest extent possible is an important element of that informed planning process.

Despite apparent declines in the number of visitors to the area in recent years, Washington, DC continues to be listed by the American Bus Association (ABA) as one of the three top domestic destinations for the past five years and as one of the top eight United States destinations for international travelers according to the most recent report by the WCTC.[3,4]

Table 1: Washington, DC Visitation Trends

Data Year	Domestic	International	Total Visitors
1998	19,800,000	1,396,000	21,196,000
1999	18,500,000	1,297,000	19,797,000
2000	17,600,000	1,481,000	19,081,000
2001	18,100,000	1,201,000	19,301,000
2002	17,600,000	1,000,000	18,600,000

Source: "2002 Visitor Statistics Press Briefing," Washington, DC Convention & Tourism Corp.

Of the17.6 million domestic visitors in 2002, approximately 63 percent are leisure visitors constituting the primary market for visitor tour transportation services. Table 2 below indicates the travel party characteristics and trends in leisure travels for the Washington, DC area for the past two years. The overall trend of leisure visitors to the Washington, DC area indicates that there was a significant increase in 2001. The Washington, DC Convention and Tourism Corporation (WCTC) attributes this spike to a "surge in visits to family and friends."[5]

[2] "2002 Visitor Statistics Press Briefing," Washington, DC Convention & Visitors Bureau, available at http://www.washington.org/.
[3] "The Best and the Rest," Destinations Magazine. American Bus Association, April 2003, available from www.buses.org/destinations/best_rest.cfm.
[4] "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.
[5] "2001 Domestic Visitor Figures Released," DC Update, Washington, DC Convention & Tourism Corporation, August 2002, p.1.

Table 2: 2001 – 2002 Washington, DC Travel Party Characteristics

Data Year	Washington, DC Leisure Visitors	Traveling Solo	Traveling w/ Companion(s)	
			w/ Adult(s) only	w/ Child or Children
2000	9,300,000	5,952,000	3,348,000*	
2001	12,308,000	4,800,120	4,061,640	3,446,240
2002	11,088,000	3,991,680	4,546,080	2,550,240

Source: "2002 Visitor Statistics Press Briefing," Washington, DC Convention & Tourism Corp.

* break-out not available

The 2002 visitation statistics indicate that approximately 36 percent of domestic leisure travelers to the area over the past year are traveling alone, and of the other 64 percent traveling with at least one other person, a little more than two-third may be traveling with children.[6]

Given that the tourism market for Washington, DC is a large economic generator, it is important to understand that activities and travel party characteristics of those visitors. The National Park Service, National Capital Parks-Central, has undertaken a visitor transportation survey primarily focused on the downtown Washington, DC area. This survey, to be completed by fall of 2003, will provide detailed data on visitor trip and travel party characteristics and transportation choices and preferences.

Impacts on the Visitor Market

In recent years a number of international, national and local events have had a significant impact on the local tourism market. World and local events have impacted visitors' economic ability and personal desires to travel. Most notably, the terrorist attacks on Washington, DC and New York, NY on September 11, 2001 had a profound and permanent affect on the tourism market. Not only was the nation's economic stability impacted, but new physical security concerns were introduced. Other world and regional events continue to impact the tourism market as well, such as the sniper attacks of fall of 2002 and fear of communicable diseases, such as recent fears surrounding Severe Acute Respiratory Syndrome (SARS).[7,8]

The WCTC reports that leisure travel experienced a boom in the first quarter of 2001, contributing to the overall annual increase of 24 percent over 2000. In addition, after the terrorist attacks of September 11, 2001, fourth quarter leisure visitation was up 29 percent from 2000.[9] There are some indications that more travelers made regional trips, and that domestic traveling has increased in 2001 reflecting a desire to travel

[6] "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.
[7] Eugene L. Meyer, "Snipers Hurt State Tourism More than 9/11," Washington Post, May 25, 2003, SM03.
[8] Craig Timberg, Katherine Shaver and Dan Eggen, "Montgomery to Take Lead in Sniper Trials," Washington Post, October 25, 2002
[9] "2001 Domestic Visitor Figures Released," August 2002, p.1.

closer to home.[10] While, the overall spending of Washington, DC leisure visitors was down 27 percent in the fourth quarter of 2001 from the previous year, this figure rebounded back to 2000 levels in 2002.[11]

It is difficult to know the long-term impacts of the terrorist attacks of September 11, 2001 on the tourism market in Washington, DC. Overall, industry indicators show varying impacts. Total visitation in to Washington, DC in 2002 dropped to its lowest in six years; however, domestic visitation, while also low, is at the same levels as it was in 2000. Local destinations report significant drops in visitation which were further impacted by recent events, such as the sniper attacks in the fall of 2002 and the recent U.S. war in Iraq.[12] In conjunction with the District Chamber of Commerce, Washington Mayor Anthony Williams recently launched an advertising initiative to stimulate the local tourism industry, called "Tour in DC." The campaign focuses on delivering the message that Washington, DC is still a safe place to visit.

Despite reported increased visitation overall in 2001, visitation to the Memorial Core, as represented by National Capital Parks - Central visitation, mirrors reports from other area destinations showing significant decreases in 2001.

Table 3: NACC Annual Visitation

Year	Total Visits	% Annual Change
1998	1,264,132	n/a
1999	1,432,569	12%
2000	2,816,985	49%
2001	1,860,851	-51%
2002	1,724,138	-8%

Source: National Park Service

Table 4: National Gallery of Art Annual Visitation

Year	Total Visits	% Annual Change
1998	6,198,523	n/a
1999	5,969,528	-4%
2000	5,126,954	-16%
2001	4,094,986	-25%
2002	4,575,182	10%

Source: National Gallery of Art

The recent sample visitation statistics for NACC and National Gallery of Art could indicate a slowing down in the post-September 11, 2001 rate of decline; however, the recent war with Iraq and the fear of SARS continue to cause fluctuation in the tourism

[10] Annie Gowen," Old Places, New Marketing," Washington Post, April 27, 2003, A01.
[11] "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.
[12] Gowen, A01.

industry.[13,14] A recent press release from the Travel Industry Association of America states,

> "Leisure travel has grown fairly steadily in the past two years despite the attacks of September 11, 2001 and the weakened economy. However, its growth began to wane near the end of 2002 and has been even more subdued in recent months."[15]

The Washington Post recently reported signs of recovery, indicating that hotel occupancy rates continue to be higher than the national average and visitation to some area destinations, such as the National Air and Space Museum, has risen in the early part of 2003.[16,17] The ultimate impacts of recent events cannot be conclusively measured for some time. It is clear that the tourism market in general is volatile and elastic.

B. Methodology Used to Define Comparable Services

As previously noted, based upon service characteristics and price three tiers of comparability to the existing NPS tour transportation service, Tourmobile, will be discussed:

1. Primary Comparable,
2. Approximate Comparable, and
3 Least Comparable.

For the purposes of this report the following methodology was used to define comparable services and to select operators for individual documentation.

Definition of Tour and Transportation Services

In order to establish which services are considered for comparability to Tourmobile, a number of assumptions were used to define the market. Comparable is defined as those operations that offer an element of both tour and transportation services to Washington, DC area visitors.

Tour: Scheduled services offering cultural, historical or thematic presentations of local destinations provided by an individual or group. The presentation does not have to be formal; however, the marketing of the operation should indicate an opportunity for such information or provision of access to cultural, historical or popular destinations.

Transportation: Services which inherently provide transportation to more than one individual, i.e. mass transit, and have a clear and primary correlation to the visitor market. An individual car or van can be mass transit if the marketing of the operation

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[13] Dana Hedgpeth, "Tourism Industry's Recovery Elusive," Washington Post, May 1, 2003, E06.
[14] Gowen, A01.
[15] "War Impedes Spring Leisure and Business Travel Plans," Travel Industry Assoc. of America press release, March 28, 2003, available from http://www.tia.org/Press/pressrec.asp?Item=263.
[16] Gowen, A01.
[17] Moreno, Sylvia, "It Looks Like Tourism as Usual," Washington Post, May 9, 2003, B01.

clearly indicates a transportation service to the visitor other than operating their own vehicle.

For all tour transportation services considered within the range of comparability three tiers of comparability were considered. These tiers were determined first by the price of the tour and next by the level of similarity of service. Where detailed information was not available for the similarity of service, it is assumed that the market price reflects the scale of service and price was used as the major qualifier of comparability.

The American Heritage Tour, the primary tour offered by Tourmobile, is priced at $20/adult; therefore tours of a very similar nature and within the range of $16 - $30/adult fare are considered primary comparables. Services offered by Tourmobile on this tour include an overview of destinations in the Memorial Core, along the National Mall and adjacent to the U.S. Capitol. Interpretive presentations are not in-depth and the tour also provides a broad orientation to the most visited areas. Each tier of comparability is discussed in more detail in *Section III* of this report.

Non-Comparable Tour and Transportation Services

For the purposes of this study, the following types of visitor tour services will not be considered within the range of comparability and will not be compared in this report:

- self-guided tours of any mode,
- guided walking tours,
- phone tours (e.g. Beyond Guide, www.beyondguide.com),
- private taxi services,
- limousine services, with no clear related guide services,
- public transit services, such as Metrobus, Metrorail or area commuter rail, or
- packaged travel, or destination services defined by the National Tour Association as, "…a trip arranged by a travel professional that includes at least two travel elements, such as transportation and accommodations."[18]

While walking is a mode of transportation, it is not providing a transportation service to the visitor; therefore, for the purposes of this study walking tours will not constitute comparable service. Self-guided walking and phone tours provide access to and information on cultural, historical, popular culture destinations; however, a self-guided tour can be conducted via a range of transportation modes, including for example a visitor's personal vehicle. Self-guided tours, all manner of walking tours and phone tours are however included in the Tour Operators Data Base discussed in *Section I.C* of this report.

Transportation companies, including private taxi services and limousine services, that offer no specific relationship to the tourism market via a minimum association with a specific guide service are considered too broad and not specific to the tourist market. Publicly offered transit services, such as Metrobus, Metrorail or area commuter rail, are

[18] "2001 Packaged Travel in North America: Executive Summary," National Tour Association website, available from http://www.ntaonline.com/0,5978,1_886_0_12308,00.html.

not considered system-wide; however, special tourist oriented fares, passes, etc. are briefly discussed in *Appendix B*.

Packaged tours, often traveling via motorcoach, represent a large portion of the visitor market to Washington, DC; however, the scope of services provided by these tour operators is outside the range of comparability to services provided by Tourmobile, such as the provision of meals, accommodation arrangements, event planning and receptive services. Additionally, other area agencies are studying the motorcoach service aspects of the packaged tour market. As there are estimated to be thousands of such operators, a sample of the motorcoach tour operators providing only tour transportation services, rather than packaged tour services is included in the Tour Operators Data Base as described in *Section I.C* of this report.

Individual Operator Documentation Selection

The information presented within the individual operator documentations, under *Section III* of this report, is provided as a snapshot of the local market. This data is not intended for technical analysis or evaluation; therefore, the selection of operators for individual documentation from the pool of comparable services is not based on any particular formula or highly specific criteria. Selected operators were selected based upon providing a range of examples (operator size, visibility, and scope of services) and the likelihood of available data.

C. Related Report: Data Base of Tour Operators and Destinations

In addition to this report, a data base of related information on local tour operators and destinations was collected. This additional data is intended for general research and local project planning. The data base also includes subset data on scheduled tours, as opposed to charter services, in the Washington, DC area. A description of the compiled data follows:

Tour Operators Data Base

The original intent of this data base was the compilation of a comprehensive list of tour operators within the Washington, DC area; however, through the course of research it became apparent that there is no source of comprehensive data on this subject. NPS contacted other area agencies conducting related research as well as conducting a search for national industry data independently. However, all sources indicate that this data gap is pervasive in the industry for all market areas. Following the 1980 deregulation of the United States motorcoach industry, the predominate tour mode nation-wide, there was no longer any mechanism for tracking the number of providers who serve a particular area. This data gap is discussed in more detail under *Section II* and in *Appendix A.*

As a result of the data gap, this data base includes a sample of tour transportation operators of all modes via first-hand observation and on-line research. The data base includes more than 60 operators; however, all industry data indicates that likely hundreds of operators (predominately charter motorcoach operators) provide tour

transportation services to the Washington, DC area. The data base also includes related tables for those operators with scheduled tours, with tour specifics (times, seasons, prices, etc.). Detailed operations and vehicle specifications are not included in this data base. More detailed information on comparable services is found within this report and specifically within *Section III.*

Area Destinations Data Base

This data base includes all major Washington, DC area destinations, as well as many more specialized destinations such as, religious institutions and national associations. Included for each destination is address, owner/operator, general proximity to Metrorail transit, service by regularly scheduled tour, and web address where available. This data base is provided for project planning and market overview purposes. The data base includes 170 different visitor destinations in the Washington, DC area.

Area Destinations: U.S. Capitol Building and the USMC War Memorial (Iwo Jima)

II. Washington, DC Tour Transportation Market Overview

A. Tour Transportation Services Offered

The Washington, DC tour transportation market includes services ranging from trolley/tram narrated, regularly-scheduled tours to reservation-required, guided bus or van tours. An exact figure of the number of tour transportation services available in the Washington, DC market is not known; however, market research indicates more than fifteen water, cycling or trolley/tram tours and estimates in the hundreds of charter bus tour services. Table 5 below lists all non-motorcoach comparable (including all ranges of comparability) tour transportation operators providing service to the Washington, DC area. There are a total of ten (10) operators, offering a total of 29 non-motorcoach tours. In addition to these tours, this study has cataloged an additional 48 comparable motorcoach tours which are regularly scheduled. The large number of tours and range of services offered underscore the strength of the Washington, DC tourism market overall. Annual surveys conducted by the National Tour Association, the association of tour operators of all types, has listed Washington, DC as one of the three best selling destinations in the United States for more than five years.[19]

Table 5: Range of Comparable Tour Operators (excluding motorcoach tours)

Tour Operator	Trolley	Water	Cycling	# of Tours	Tour Cost Range
Atlantic Canoe and Kayak		Yes		4	$32 - $52
Bike the Sites, Inc.			Yes	7	$40 - $80
Canal Boat Rides		Yes		2	$8
Capital River Cruises		Yes		1	$10
Dandy Restaurant Cruise Ship		Yes		1	$33 - $80.50
Gray Line/Goldline/Martz	Yes			1	$28 - $80
Historic Tours of America	Yes	Yes		4	$15 - $26
Landmark Services Tourmobile, Inc	Yes			3	$6 - $20
Potomac Riverboat Tours		Yes		3	$8 - $27
Spirit Cruises		Yes		3	$8 - $39

The majority of the area tour transportation providers provide a mix of regularly scheduled tours and charter, often personalized, tours. For example, Atlantic Canoe and Kayak offers four (4) different guided tours in the Washington, DC area in addition to special tours for annual events such as viewing 4th of July fireworks from the Potomac or special tours during the Cherry Blossom Festival for viewing the blossoms from the waterfront. Both Spirit Cruises and Dandy Restaurant Cruise Ship offer additional non-narrated cruises, and have boats available for charter tours as well.

A number of tour operators offer a variety of transportation modes as well; for example, Historic Tours of America offers both the Old Town Trolley service and the DC Ducks

[19] "2000 Tour Operator Profile," National Tour Association website, available from http://www.ntaonline.com/0,5978,1_886_0_12308,00.html.

tour (land and water tour in a re-fashioned World War II amphibious military vehicle). The most dominate tour mode serving the Washington, DC area is motorcoach.

As previously noted there is no documented count of the number of motorcoach tours operating in the Washington, DC area; however, industry data indicates a possible national market of more than 2,300 operators who may be serving the Washington, DC area for a variety of regularly scheduled and charter tours. Given the Washington, DC area's popularity as a destination, it is likely that the region captures a large portion of this possible market. The dominant presence of motorcoaches providing service to the Washington, DC area is clearly visible in the Memorial Core, at Arlington Cemetery and other area destinations. This tour market is also discussed in *Appendix A* of this report.

Motorcoaches Stacked-up at the Lincoln Memorial

A wide range of themed tours are offered in the Washington, DC area. The majority of these themed tours are primarily provided by motorcoach operators such as the *Historic Washington Homes Tour* provided by A Tour De Force, the *Civil Rights Tour* provided by Site Seeing Tours, Inc. and the *Jacqueline Bouvier Kennedy: At Home in Washington Tour* provided by UC Tours. Within the themed tour market there are a few specific examples of regularly scheduled tours including the *SpyDrive* tour operated by the Center for Counterintelligence and Security Studies (CI Centre) and the *Scandal Tour* operated by the Gross National Product comedy group.

It is not possible to document the number of possible themed tours available because of the large number of personalized itineraries available; however, there is a clear market for themed tours ranging from historical events, such as the civil rights movement, to educational tours focusing for example on the U.S. Legislature and the U.S. Supreme Court. A Tour De Force alone offers themed, primarily motorcoach, tours covering such topics as:

- African American sights,
- Architecture,
- Art,
- Cemeteries,
- Civil War Times/Mr. Lincoln's City,
- Famous People,
- First Ladies/Presidents,
- Gardens,
- Military Memorials,
- Neighborhoods,
- Sacred Structures,
- The Gilded Age, and
- Women's Sights.

The walking tour market, while not considered a comparable service, does validate the strong market for specialized and thematic tours. The DC Heritage Tourism Coalition

website alone lists 36 different themed walking tours ranging from haunted neighborhoods to the grand hotels of Washington, DC offered by a variety of guides.

In addition to a range of itineraries, tour services offered also include guide services in a range of languages. A number of motorcoach tour operators offer multi-lingual guide services ranging from Asian languages to Spanish and Portuguese. The U.S. Department of Commerce Office of Travel and Tourism Industries (Department of Commerce OTTI) reported that 50.9 million international visitors came to the United States in 2000, and the 2000 Travel Trends report for Washington, DC estimates 1.6 million, or approximately 32 percent, of those international visitors came to Washington, DC.[20,21] The Department of Commerce OTTI reports that the national market for international visitors in 2000 was primarily comprised of European visitors (50 percent), Asian visitors, primarily Japanese (30 percent), and South American visitors (the remaining 20 percent).[22]

For the range of tour transportation services offered in the Washington, DC area the costs range from free to more than $130. Most guided, one-day tours fall within the range of $20-$40/adult. The WCTC reports that the average domestic visitor spent an average of $194.58/day including tours, transportation, accommodations, food, etc.[23] There are no industry figures for how much money the average Washington, DC visitor spends for tour transportation specifically; however, the ABA estimates that the average price paid nation-wide for a day charter tour, generally including at least one meal, was $74.34 in 2001.[24] The adult fares of comparable tour transportation services are presented in more detail under *Section III* of this report.

George Washington University recently conducted a study for the ABA of the economic impacts related to the tour bus market, using Washington, DC as one of the example study markets. For the Washington, DC area the average motorcoach/bus of visitors contributed $4,780 to local hotels, restaurants and destinations per trip. Tour prices for the three study locations, Washington, DC, Lancaster, PA and New York City, "…ranged from $58.80 for a Washington day tour to $900 for a 3-day trip to New York City."[25] Despite recent impacts on the tourism market, Washington, DC hosted an estimated 11 million domestic leisure visitors in 2002 (17.6 million domestic leisure and business visitors overall) in addition to foreign nationals specifically visiting the Washington, DC region.[26]

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[20] 2000 Travel Trends, Washington, DC Convention and Tourism Corporation, available at http://www.washington.org/.
[21] "Inbound Travel to the U.S. Overview," U.S. Dept. of Commerce OTTI website, available at http://tinet.ita.doc.gov/.
[22] Ibid.
[23] "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.
[24] "The Economic Impact of Bus Tours: Highlights," George Washington University, 2001, ABA website, available from http://www.buses.org/.
[25] ibid.
[26] "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.

B. Comparable Market Example: San Francisco, CA

A brief description of the tour transportation market of San Francisco, CA is presented for comparison purposes only. San Francisco, CA was selected as a comparable to the Washington, DC market based upon its similar metropolitan population size, the presence of a wide range of destinations, including National Park Service resources, its proximity to similar transportation mode choices and its similar draw for international, as well as national tourism markets. The summary comparison indicates that the tour transportation market for Washington, DC is similar in scope and size to that of an analogous metropolitan area, and can therefore be presumed to be reasonable and adequately serving area visitors.

A comparison of the two metropolitan areas indicates very similar tour transportation markets. Overall the metropolitan areas are similar in size and attract visitors, both national and international on the same scale.

Table 6: Washington, DC and San Francisco, CA Comparisons

Point of Comparison	San Francisco, CA	Washington, DC
2000 population (CMSA)*	7,039,362[1]	7,608,070[1]
estimated 2001 tourists	15.7 million[2]	18.1 million[3]
estimated 2000 international/overseas tourists	2.83 million[2]	1.6 million[3]

* Consolidated Metropolitan Statistical Area, U.S. Census Bureau

Sources: 1 U.S. Census Bureau
2 San Francisco Convention and Visitors Bureau
3 Washington, DC 2001 Travel Trends

The broad similarity in resident and visitor populations of the metropolitan San Francisco and Washington, DC areas provides a basis for comparison for the Washington, DC area tour transportation market. No available data was found with detailed visitor trip patterns within the San Francisco area. On-line research indicates that both areas have similar difficulties in measuring detailed visitor use and trip patterns. The San Francisco Convention and Visitors Bureau indicates that most San Francisco area destinations do not have controlled entrance points, such as a gate to a theme park, a similar situation to many popular destinations in Washington, DC, such as the National Mall.

By comparison, the Washington, DC area's tour transportation market appears very similar to that of San Francisco, CA. Both metropolitan areas are served by public transportation, charter bus tour services, cycling, trolley/tram tours, water-based tours, and even "Duck" tours. The area tour markets are also comparable for those tour services not categorized as comparable to Tourmobile, such as walking and self-guided tours. San Francisco City Guides offers more than 30 different free walking tours in the

metropolitan area.[27] San Francisco is even served by some of the same operators who serve Washington, DC, such as Gray Line, providing trolley tours as well as charter motorcoach tours. The tour transportation services in the San Francisco area include multi-lingual guide services as well.

Preliminary research indicates one important difference between the two markets. San Francisco's multi-day charter tour service market is not as dominant as that of the Washington, DC area. There is a strong market for regional charter motorcoach day-tours, such as tours of Alcatraz Island, Muir Woods National Monument, Yosemite National Park and Napa and Sonoma Valleys.

A comparison table of a sample of tour transportation services between San Francisco, CA and Washington, DC demonstrates that the type and cost range of services provided in Washington, DC is analogous to those of a similar city/destination area, and can therefore be understood to be appropriately serving the existing visitor market.

[27] San Francisco City Guides website, available at http://www.sfcityguides.org/

Table 7: Washington, DC and San Francisco, CA Tour Transportation Comparison
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Table 7: Washington, DC and San Francisco, CA Tour Transportation Comparison
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C. Washington, DC Area New Infrastructure and Destinations Overview

New Infrastructure

In order to understand how the existing visitor tour transportation market compares to future transportation service plans, an overview of area long-range transportation plans and visions is summarized below. The National Capital Planning Commission (NCPC) *Extending the Legacy Plan (Legacy Plan)* is the visionary long-range plan for the Washington, DC area. The *Legacy Plan*, completed in early 2001, identifies key areas within the Washington, DC region for future development and investment, with a focus on reconnecting and integrating all areas within the region. The plan identifies eight key areas/corridors for investment focus:

- North and South Capitol Streets,
- Southwest Waterfront,
- East Capitol Street,
- Eighth Street, NW,
- Federal Triangle,
- Anacostia Waterfront,
- Maryland Avenue, SW, and
- The Kennedy Center

Many of the goals laid out in the Legacy Plan revolve around providing new and improved transportation access and the plan recognizes that these improvements must serve both residents and visitors. The plan states, "Nurturing tourists is vital to Washington's long-term economic interests."[28] The on-going plans of the Washington Metropolitan Area Transit Authority (WMATA) and the District Department of Transportation (DDOT) to improve transportation connectivity and access will serve both residents and visitors, and support the goals laid out in the *Legacy Plan*.[29] DDOT recently identified three over arching focuses for future transportation investment, in anticipation of the federal reauthorization of the Transportation Equity Act for the 21st Century.[30]

1. Renew Aging Infrastructure (bridge replacements, up-grading and converting transit vehicles, improving and up-dating systems' images, etc.)
2. Support the Anacostia Waterfront Initiative (primary identified investment corridor for transit connections)
3. Develop Transportation Alternatives (neighborhood circulators to augment existing systems, improve cross-district flow and access, city-wide light-rail/trolley network).

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[28] Extending the Legacy: Planning America's Capital for the 21st Century, National Capital Planning Commission, 2001, pg. 58.

[29] "City Council Hearing on the District of Columbia Transit Development Study," Presentation to District of Columbia City Council on September 18, 2002, prepared by Washington Area Transit Authority.

[30] "Transportation Reauthorization Project Request to the U.S. House of Representatives Committee on Transportation and Infrastructure Subcommittee on Highways and Transit," presented by the District Department of Transportation and the Government of the District of Columbia, March 2003.

These investment priorities clearly support the goals of the Legacy Plan, such as re-connecting underdeveloped and isolated areas of the metropolitan area and focusing redevelopment activity around the waterfronts. A number of significant project are currently underway within the region which underline how these goals and policies are also focused on better serving future visitors by providing new and better uses for the resources in Washington, DC Four of the preeminent initiatives are discussed below:

The Downtown Circulator is a joint planning effort between the NCPC, WMATA, DDOT and the Downtown DC Business Improvement District (BID), an organization of civic and business interests in downtown Washington, DC. The proposed Circulator will provide low-fare, fast, and convenient transit service between the Memorial Core, the Convention Center, the National Mall and Southwest Waterfront and the Capitol. The proposed system is designed to provide supplemental transit service to both visitors and downtown workers.[31]

A major focus of both WMATA and DDOT for future expenditures is cross-district connections. These projects focus on improving access and traffic flow throughout the metropolitan area to natural, civic and cultural resources far beyond those found only in the downtown and Memorial Core areas. The Downtown Circulator proposal, a current study of city-wide light-rail/trolley services, a study of improvements to the K Street transit corridor (including bus-rapid transit and proposed future light-rail) and a study of new east-west, rather than radial, Metrorail corridors are all underway. All of these studies underline the desire to provide better connectivity and a broad, more user-friendly transit options for both residents and visitors.

The Anacostia Waterfront Initiative is a collaborative effort between the District of Columbia and twelve partner federal agencies, including the National Park Service, to promote development of the waterfront areas, protect the water-quality and natural resources along the river and reconnect the waterfront neighborhoods to the larger urban fabric. Projects will include promotion of specific areas for improved recreational opportunities and the redevelopment of Robert F. Kennedy Stadium, the anchor of East Capitol Street.

The Kennedy Center is one of the premier civic centers of the Washington, DC area; however, it is surrounded on three sides by of a web of freeway ramps. The Kennedy Center is working in conjunction with DDOT and the Federal Highway Administration to reconfigure the transportation network surrounding the Center, as well as improve vehicular, pedestrian and future Potomac River access to the Center itself.

New Destinations

Despite recent fluctuations in area visitation, many new destinations have recently or are soon to open. The Mayor William's Tour DC marketing initiative also reflects the

[31] Downtown DC Business Improvement District website available at http://www.downtowndc.org/download/circulator.pdf.

move to attract business and convention tourism to support the newly opened 2.3 million square foot Washington Convention Center. The center hopes to attract three million people per year to the Washington, DC area.[32]

The two most recent significant destination additions were the opening of the International Spy Museum, the first museum dedicated solely to presenting the trade and history of espionage in the United States, and the City Museum of Washington, DC. The International Spy Musuem is also one of the few major destinations in the Washington, DC area to charge admission; however, despite this the museum has surpassed expected visitation. The City Museum includes a historical view of the District of Columbia as well as providing an introduction to the neighborhoods and communities for Washington, DC visitors.

With the exception of the Smithsonian Institution National Air & Space Museum Udvar-Hazy Center at Dulles Airport, all of the new planned major destinations will be located in the downtown Washington, DC area, and most will be in or adjacent to the Memorial Core area. Below is a timeline of the up-coming new major destinations.[33] In addition to those shown below, there are additional destinations planned which do not yet have identified opening dates, the most notable of which is a planned museum for African American history and culture. It is expected that this museum will also be located in or adjacent to the Memorial Core area.

[32] Washington Convention Center website available at http://www.dcconvention.com/newcenter/facts.asp
[33] All opening dates taken from: "2002 Visitor Statistics Press Briefing," available at http://www.washington.org/.

III. Tour Transportation Market by Price/Service Range

As discussed in *Section I.B* of this report, for all tour transportation services considered within the range of comparability three tiers of comparability were considered and compared against the baseline service of Tourmobile, specifically the American Heritage Tour, the primary tour offered by Tourmobile, which is priced at $20/adult.

Information presented in the operator summaries represents data collected through service observation, advertised services on company brochures and websites and direct data collection with operators. All areas noted as served by each tour include sites which were observed and interpreted in addition to those sites served with tour stops.

Note: proprietary operating data has been removed from this report, specifically ridership and cost related operating figures.

Tourmobile articulated tram stopped along the National Mall.

A. Baseline: Landmark Services Tourmobile, Inc.

Landmark Services Tourmobile, Inc. (Tourmobile) provides tour and transportation services to area visitors through a concession contract with the National Park Service, National Capital Region. This concession contract provides Tourmobile with the only license to provide this service on lands under the jurisdiction of the National Park Service in the Washington, DC area.

Tourmobile provides two tours in the Washington, DC area, and two multi-day combination tour packages.[34] This study focuses on the primary tour services provided in and adjacent to the Memorial Core and the National Mall areas. These include:

1. American Heritage Tour (with optional Arlington Cemetery Tour), and
2. Washington By Night.

[34] For the purposes of this report, tour services provided within Arlington National Cemetery are considered as part of the American Heritage Tour reflecting the manner in which tickets are sold by Tourmobile for the American Heritage Tour.

Tourmobile operates both of these core tours with unique vehicles. These trams are articulated and can accommodate as many passengers as a motorcoach while affording the visitor a more open view than a motorcoach.

One-day tours serving Mount Vernon Estate and Gardens and the Frederick Douglass National Historic Site are currently suspended; however, available two-day package tours do include these destinations. Tourmobile is the only tour transportation operator who is permitted by the U.S. Department of the Army to operate within Arlington National Cemetery.

1. American Heritage Tour (optional Arlington Cemetery Tour)

Scope of Service

Areas Served

- Anacostia/East Capital
- ✓ Arlington Cemetery
- Dupont Circle
- Embassy Row
- Georgetown
- Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- Other(s)

Estimated Ridership: [redacted]*

** This figure does not include an estimated 120,000 visitors/month on the Arlington National Cemetery tour, which would include visitors from a composite of Landmark Services Tourmobile tours and other area tours that bring visitors to Arlington National Cemetery.*

Details of Service

Hours of Operation (peak season):

Weekdays: 9:30 a.m. – 4:30 p.m.
Weekends: same

Length of Tour: avg. 3 hours

Season(s) Service: year round, daily

Average Headways:

Weekdays: 20 mins.
Weekends: 13 mins.

Average Stop Times: est. 3-5 mins.

Maximum Passenger Loads: est. 85 visitors/vehicle

Staffing: 1 driver and 1 guide/vehicle and 1 staff at each of the sales stops: Union Station and Jefferson Drive sales kiosk.

Visitor Experience

Guide/Interpretation Type: Dedicated guide. Tourmobile provides interpretive presentations on area memorials and sites, including design significance of memorials, statues and architecture, institutional histories and interpretation of historical sites. The tour provides an orientation to the Memorial Core, Arlington Cemetery and the National Mall. This is the only tour transportation which includes interpretation of sites within Arlington Cemetery. Some information regarding hours of operations and tickets for area sites is included.

Cost/Passenger:

Adult: $20.00*
Child: $10.00
Senior: n/a

Vehicle Characteristics: Tram vehicle with one entrance/exit point at front of the vehicle and an additional exit point at the rear. Standard vehicles are accessible for riders with minimal mobility impairments, and all other handicapped riders must make arrangements in advance for wheelchair accessible vehicles. Seats are fiberglass benches. Vehicle is open to the air in summer season, but can be enclosed and heated. With the exception of two compressed natural gas vehicles, the vehicle fleet is gasoline based.[35]

Tram vehicles used for Arlington National Cemetery optional tour loop are unique. These trams are open on one side for boarding to all rows of seats, and are secured while the tour is in motion with metal gate. These trams feature bench seating for 5-7 persons/row. Additionally, these trams are not articulated, but two trams are hitched together for the standard tour.

Ticketing Structure: Tickets can be purchased in either on-line or over the phone with Ticketmaster, at Tourmobile sales kiosks in Union Station or seasonally at Jefferson Drive kiosk. In addition tickets can be purchased on board at any stop. Credit cards are accepted at sales kiosks only.

Service Marketing: On-line at (http://www.tourmobile.com) and on sign-kiosks in the Memorial Core and National Mall areas at Tourmobile stops.

** Cost/passenger includes price of Arlington Cemetery Tour. When purchased as a separate tour the cost/adult is $6.00 and the cost/child $5.50.*

Description: Boarding and re-boarding is allowed at all stops. The Tourmobile tour concentrates on the National Mall and Memorial Core areas. This is the only one of the daytime trolley/tram type tours offered in the Washington, DC area that stops at the Jefferson Memorial. In addition, Tourmobile is the only tour which is permitted within Arlington Cemetery. The tour also includes stops along Madison and Jefferson Drives which are the National Mall entrances to the Smithsonian Institutions and the National Gallery of Art. No stops coincide with hotels, nor are courtesy hotel pick-ups provided in advance of the tour.

2. Washington By Night

Scope of Service

Areas Served

Anacostia/East Capital
Arlington Cemetery
Dupont Circle
Embassy Row
Georgetown

[35] Conversion of two trams to CNG is the result of a DOI pilot program in 1992. No data is available at the time of this report regarding the results of that pilot program.

Kennedy Center
MCI/Convention Center
✓ Monumental Core
National Cathedral
✓ National Mall
Rock Creek Park/Zoo
✓ U.S. Capitol
✓ Union Station
✓ White House
Other(s): Pennsylvania Avenue

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):
Weekdays: 7 p.m.
Weekends: same

Length of Tour: avg. 3 hours

Season(s) Service: year round, daily

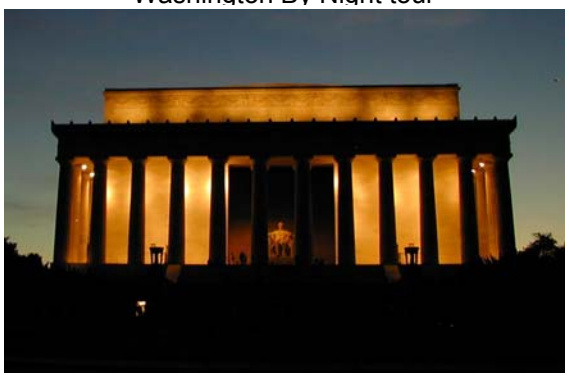
Average Headways:
Weekdays: n/a
Weekends: n/a

Average Stop Times: est. 10-20 mins.

Maximum Passenger Loads: est. 85 visitors/vehicle

Staffing: 1 driver and 1 guide/vehicle

Lincoln Memorial as seen on the Tourmobile Washington By Night tour



Visitor Experience

Guide/Interpretation Type: Dedicated guide. Tourmobile provides interpretive presentations on area memorials and sites, including design significance of memorials, statues and architecture, institutional histories and interpretation of historical sites.

Cost/Passenger:
Adult: $20.00
Child: $10.00
Senior: n/a

Vehicle Characteristics: Tram vehicle with one entrance/exit point at front of the vehicle and an additional exit point at the rear. Standard vehicles are accessible for riders with minimal mobility impairments, and all other handicapped riders must make arrangements in advance for wheelchair accessible vehicles. Seats are fiberglass benches. Vehicle is open to the air in summer season, but can be enclosed and heated. With the exception of two compressed natural gas vehicles, the vehicle fleet is gasoline based.

Ticketing Structure: Tickets can be purchased in either on-line or over the phone with Ticketmaster, at Tourmobile sales kiosks in Union Station.

Service Marketing: On-line at (http://www.tourmobile.com) and on sign-kiosks in the Memorial Core and National Mall areas at Tourmobile stops.

Description: This tour makes only three (3) stops: at the Jefferson Memorial, the FDR Memorial and a joint stop for the Lincoln, Vietnam Veterans and Korean War Memorials. No stops coincide with hotels, nor are courtesy hotel pick-ups provided in advance of the tour.

B. Primary Comparables

As discussed in *Section I.B* of this report, the definition of comparable tours includes regularly scheduled services offering interpretive presentations of local destinations provided by an individual or group and which inherently provide transportation to more than one individual. Within the price range of primary comparables to Tourmobile are any tours which fall within the range of ≥ $16 and ≤ $30. There are eight (8) operators offering tours 20 different tours which fit within the definition of comparable. Three (3) of those operators, Historic Tours of America, Gray Line / Martz Group (Gray Line) and Gross National Product's Scandal Tour. These operators provide a total of eight (8) different comparable tours.

The comparable tours to Tourmobile are provided via several modes of transportation including, trolleys, motorcoaches, boats and individual vans. Historic Tours of America and Gray Line operate trolley tours and evening tours which are most closely comparable to Tourmobile's services. These tours provide very similar interpretive services, and generally only vary from Tourmobile by route and vehicle type. Each of these operators also offer private charter tours on demand.

Specific market segments served was not generally available; however, rough estimates of available ridership data indicate that the individual market share of visitors on daytime tours is evenly distributed between the mostly closely comparable operators and tours. Prices/adult for these daytime tours range from $20 to $28, and from $20 to $30 for evening tours. One of the more notable differences in marketing between these operators was the "Hometown Pass" option available to Historic Tours of America patrons. Recognizing repeat business generated by locals hosting out-of-town guests, Historic Tours of America allows local residents to sign-up for a free "Hometown Pass" which allows them to take tours for free when accompanied by a guest.

Gross National Product's Scandal Tour is an anomaly from the typical tour because it is offered for smaller groups, 4-5 persons, and therefore provides more direct interaction between the visitor and the guide. This tour also caters to a specific audience interested in political scandals and political history rather than a broad overview of area sites. The comparable tours offered by a range of operators include both the broad overview tours as well as tours focused on specific sites or subject matter, such as Mount Vernon or the Scandal Tour.

Table 8: Primary Comparables
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Operator 1: Historic Tours of America (Old Town Trolley)

Historic Tours of America operates three comparable interpretive tours in the Washington, DC area:

1. Old Town Trolley Tour of Washington (with optional Memorial Loop connecting tour to Arlington Cemetery Visitor Center and FDR Memorial included from the Lincoln Memorial);
2. Monuments by Moonlight; and the
3. DC Ducks.

In addition to the Washington, DC area, Historic Tours of America also operates tours in San Diego, CA, Key West, FL, St. Augustine, FL, Boston, MA and Savannah, GA. The company facilitates the host-visitor phenomenon by offering a "Hometown Pass" via on-line registration for those persons who live in any of the six areas served by Historic Tours of America. This pass for use on any of Historic Tours of America tours is free to the resident when accompanied by a paying visitor, making it more likely that the host will bring his/her guests business to Historic Tours of America. Additionally, all tickets purchased on-line for any tour are given a 10 percent discount. Tour vehicles are also available for private charter tour use.

Peak seasons generally correspond with the summer months, June – August, as well as heavy volumes in spring, such as the Cherry Blossom festival and school spring breaks.

1. Old Town Trolley Tour of Washington (with optional Memorial Loop)

Scope of Service

Areas Served

- Anacostia/East Capital
- ✓ Arlington Cemetery
- ✓ Dupont Circle
- ✓ Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- ✓ MCI/Convention Center
- ✓ Monumental Core
- ✓ National Cathedral
- ✓ National Mall
- ✓ Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- Other(s):

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):

Weekdays: 9:30 a.m. – 5:30 p.m.
Weekends: same

Length of Tour: 2 – 2.5 hours

Season(s) Service: year round, daily service ends at 4:30 during winter season

Average Headways:
Weekdays: 15-20 mins.
Weekends: 5 min.

Average Stop Times: est. 3 minutes

Maximum Passenger Loads: 35-40 / trolley

Staffing: 1 driver/guide per trolley and 1 staff at each of the sales stops: Union Station, Hotel Washington/JW Marriott, and Georgetown. Drivers switching points at Old Post Office Tower Pavilion and Union Station.

Visitor Experience

Guide/Interpretation Type: Driver/Guide. Similar information to other area trolley/tram tours with additional information about specific hotel, shopping and restaurant establishments. Some information regarding hours of operations and tickets for area sites. Also provides orientation to city attractions. Interpreters demonstrated flexibility in interpreting sites not typically included when re-routing was necessary.

Cost/Passenger:
Adult: $26.00
Child: $13.00
Senior: n/a

Vehicle Characteristics: Trolley cars with one entrance point at front of the car. Most trolley cars equipped with wheelchair lifts, including all new trolleys. Handicapped riders suggested to make reservations in advance for best service. Seats are wooden benches. Vehicle is open to the air in summer season, but can be enclosed and heated. Nearly all of the trolley vehicles run on propane, and Historic Tours of America maintains its own fueling station. Trolley fleet does not include low-floor or kneeling vehicles.

Old Town Trolley touring near the Convention Center.

Ticketing Structure: Tickets can be purchased in either on-line at 10 percent discount, or from Old Town Trolley staff at one of 3 designated stops (Union Station, Hotel Washington/JW Marriott, and

Georgetown). Passengers boarding at non-sales stops wait to purchase tickets until a sales stop is reached on the honor system. Tickets can be purchased on-line for all tours, at many area hotel gift shops/concierge desks. Many stops are co-located with major hotels.

Service Marketing: Very thorough website (http://www.historictours.com/washington/) with links to attractions served, area restaurants and many trip planning resources.

Description: The Old Town Trolley tour of Washington stops often correspond with area hotels. Driver/guides are in regular radio contact with an operations center and appear to have been counting passenger loading and unloading. Board/re-boarding permitted at all stops. The tour is accompanied by sound bites on area facts, tour information and safety recorded by celebrity impersonator(s). On hot summer days, the Old Town Trolley gave away fans with the Historic Tours of American logo printed on them. Boarding and re-boarding is allowed at all stops.

The Memorial Loop service to Arlington Cemetery and the FDR Memorial (originating and concluding at the Lincoln Memorial) was no extra charge and presented three options to riders for moving around the Cemetery:

1. free, self-guided walking tour;
2. cemetery tour (Tourmobile) tickets for motorized tour through the cemetery; or
3. suggested walk to Kennedy Grave sites, only 8 minutes each way from Visitor Center.
   Memorial Loop headway closer to advertised 30 minutes than regular tour.

The Memorial Loop vehicle varied from standard open air trolley to an enclosed larger trolley accommodating same number of passengers and also wheel chair lift equipped.

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2. Monuments by Moonlight

Scope of Service

Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- Dupont Circle
- Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- ✓ Other(s): U.S. Marine Corp Memorial (Iwo Jima)

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):

Weekdays: 7:30 p.m.
Weekends: same

Length of Tour: 2.5 hours

Season(s) Service: year round, once/day

Average Headways:
Weekdays: n/a
Weekends: n/a

Average Stop Times: average 10 – 15 minutes, 20 minutes at Lincoln Memorial

Maximum Passenger Loads: 35-40 / trolley

Staffing: 1 driver/guide

Visitor Experience
Guide/Interpretation Type: One driver/guide provides interpretive presentation on the tour. Tour only makes 3 stops: FDR Memorial, Lincoln/Vietnam Veterans/Korean War Memorials and U.S.M.C. Memorial

Cost/Passenger:
Adult: $26.00
Child: $13.00
Senior: n/a

Vehicle Characteristics: Trolley cars with one entrance point at front of the car. Most trolley cars equipped with wheelchair lifts, including all new trolleys. Handicapped riders suggested to make reservations in advance for best service. Seats are wooden benches. Vehicle is open to the air in summer season, but can be enclosed and heated. Nearly all of the trolley vehicles run on propane, and Historic Tours of America maintains its own fueling station. Regular trolley not low-floor.

Ticketing Structure: Advanced reservations required, minimum 2 hours prior. Tickets are purchased either on-line or at Union Station, departure point. Reservations must be made over the phone or in person at Union Station. Tickets can be purchased on-line for all tours, at some area hotel gift shops/concierge desks.

Service Marketing: Service marketed on-line (http://www.historictours.com) and at the Historic Tours of America kiosk at Union Station.

Description: Some stops are made and passengers may disembark; however, passengers must re-board the same vehicle within the allotted stop time to progress with the tour. This tour makes three (3) stops at the FDR Memorial, the U.S.M.C. War Memorial (Iwo Jima), and the Vietnam Veterans War Memorial and the Lincoln Memorial (combined stop). Hotel pickups are made in advance of the Union Station departure time at four area hotels: the Mayflower Hotel, the Omni Shoreham, the Capital Hilton and the Hyatt Regency.

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3. DC Ducks

Scope of Service
Areas Served
- Anacostia/East Capital
- ✓ Arlington Cemetery
- Dupont Circle
- Embassy Row
- Georgetown
- Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall

Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- ✓ Other(s): Albert Einstein Memorial, Japanese American Memorial to Patriotism, Taft Memorial and Pennsylvania Avenue including the U.S. Court House, and the U.S. Navy Memorial.

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):
Weekdays: 10 a.m. – 4 p.m.
Weekends: same

Length of Tour: 1.5 hours

Season(s) Service: March to November, daily service

Average Headways:
Weekdays: 60 minutes
Weekends: 30 minutes

Average Stop Times: n/a

Maximum Passenger Loads: 28 / vehicle

Staffing: 1 driver/guide per vehicle and 1 additional staff at departure point.

Visitor Experience

Guide/Interpretation Type: One driver/guide provides interpretive presentation on the tour. This is a non-stop tour. Interpreters demonstrated flexibility in interpreting sites not typically included when re-routing was necessary.

Cost/Passenger:
Adult: $26.00
Child: $13.00
Senior: n/a

Vehicle Characteristics: Original World War II amphibious land vehicle/water craft, called DUKWs. Vehicles not handicapped accessible. Vehicles are open air and not enclosable. Top nautical speed is estimated 5 knots/hour. Vehicles are valued at roughly [redacted], and gasoline fueled.

DC Duck tour leaving Union Station.

Ticketing Structure: Tickets are purchased either on-line or at Union Station at Historic Tours of American kiosk.

Service Marketing: Service marketed on-line (http://www.historictours.com) and at the Historic Tours of America kiosk at Union Station. Duck bill noise-makers are provided to tour participant for additional entertainment and as a souvenir of the tour.

Description: Seasonal tour only, running from mid-March to November. Union Station is the departure and return point for the tour. Gravelly Point, adjacent to Regan National Airport, is the entrance/exit point for the tour into the Potomac River. Approximately 20 - 25 minutes of the tour is in the Potomac River, including only a short circle around the river adjacent to the airport. Presence of full truck, including wheels, contributes to low vehicle speed in the water, and resulting in a short water tour only.

DC Duck entering the water at Gravelly Point.
(photo from Historic Tours of America website)

Operator 2: Gray Line / Martz Group
Gray Line or Martz Group (Gray Line) operates thirteen different tours and excursions in and from the Washington, DC area; four of these tours are comparable:

- L'il Red Trolley
- Washington After Dark
- Washington, Embassy Row & Arlington National Cemetery
- Mount Vernon and Old Town Alexandria

In addition to these tours Gray Line offers a number of non-comparable one- and two-day coach tours to area sites and outlying sites such as Gettysburg, PA and Williamsburg, VA. The majority of Gray Line's comparable and non-comparable tours are provided via motorcoach; however, the L'il Red Trolley tour is provided in a historic/historic replica trolley.[36]

Gray Line operates a ticket kiosk and tour departure point for all tours from the parking level of Union Station. Many tours include hotel pick-ups prior to the tour at area hotels, including all four of the comparable tours. The L'il Red Trolley includes many stops which correspond with area hotels, and hotel pick-ups are made at major area hotels in advance of Union Station departure times for the three remaining comparable tours. Hotel returns following the tour are not guaranteed.

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1. L'il Red Trolley

Scope of Service
Areas Served

- Anacostia/East Capital
- ✓ Arlington Cemetery
- ✓ Dupont Circle
- ✓ Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- ✓ MCI/Convention Center
- ✓ Monumental Core
- ✓ National Cathedral
- ✓ National Mall
- ✓ Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- Other(s)

Estimated Ridership: *not available*

Details of Service
Hours of Operation (peak season):
Weekdays: 9:00 a.m. – 5:00 p.m.
Weekends: same

[36] It is unknown at the time of this report if the trolley vehicles used for the L'il Red Trolley tour are in fact historic vehicles.

Length of Tour: 2 – 2.5 hours

Season(s) Service: year round, with two week closure from Jan. 1st – Jan. 20th.

Average Headways:
Weekdays: 40 – 45 mins.
Weekends: 30 mins.

Average Stop Times: est. 2-5 minutes

Maximum Passenger Loads: 30-32 / trolley

Staffing:1 driver/guide and 1 ticket sales staff at Union Station sales kiosk.

Visitor Experience
Guide/Interpretation Type: Driver/Guide. Similar information to other area trolley/tram tours with focus on pointing out the sites as well as architectural facts. Also gave restaurant endorsements at various stops.

Cost/Passenger:
Adult: $28.00
Child: $14.00
Senior: n/a

Vehicle Characteristics: Trolley vehicles with accommodation for handicapped patrons in rear of vehicle. Driver's seat obscures views on left-hand side of vehicle somewhat. Trolley vehicles are not low-floor or kneeling vehicles. Open to the air, except during inclement weather. Vehicles have wooden benches.

L'il Red Trolley parked at the Gray Line Terminal at Union Station.

Ticketing Structure: Ticket could be purchased from some drivers, and at some stops – honor system for those patrons boarding at non-sales stops. Tickets could be consistently purchased at Union Station, from a Gray Line booth on the parking level, and in advance on-line.

Service Marketing: Service is advertised on-line (http://www.grayline.com) and also on free maps distributed by Downtown DC BID. Route stops also marked on this free map.

Description: Many stops coincide with area hotels, and tickets can be purchased at many of these hotels and souvenir shop. Board/re-boarding permitted at all stops. Union Station sales kiosk and stop located in parking level at the rear of the station.

2. Washington After Dark

Scope of Service

Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- Dupont Circle
- Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ White House
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ Other(s): USMC War Memorial

Estimated Ridership: *not available*

Details of Service

Hours of Operation (peak season):

Weekdays: 7:45 p.m.
Weekends: same

Length of Tour: 3 hours

Season(s) Service: April 1st – December 31st, once/day

Average Headways:

Weekdays: n/a
Weekends: n/a

Average Stop Times: *not available*

Maximum Passenger Loads: *not available*

Staffing:1 driver/guide and 1 ticket sales staff at Union Station sales kiosk.

Visitor Experience

Guide/Interpretation Type: Driver/Guide.

Cost/Passenger:

Adult: $30.00
Child: $15.00
Senior: n/a

Vehicle Characteristics: motorcoach

Ticketing Structure: Tickets can be purchased at Union Station, from a Gray Line booth on the parking level, and in advance on-line.

Service Marketing: Service is advertised on-line (http://www.grayline.com).

Description: Some stops are made and passengers may disembark; however, passengers must re-board the same vehicle within the allotted stop time to progress with the tour. This tour makes four (4) stops at the Jefferson Memorial, the Lincoln, Korean War and Vietnam Veterans War Memorials (combined stop), the FDR Memorial, the Kennedy Center. Union Station sales kiosk and stop located in parking level at the rear of the station.

3. Washington, Embassy Row & Arlington National Cemetery

Scope of Service

Areas Served

- Anacostia/East Capital
- ✓ Arlington Cemetery
- Dupont Circle
- ✓ Embassy Row
- ✓ Georgetown
- Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ White House
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ Other(s): USMC War Memorial, FBI Headquarters and US Navy Memorial

Estimated Ridership: *not available*

Details of Service

Hours of Operation (peak season):

Weekdays: 8:30 a.m. and 2 p.m.
Weekends: same

Length of Tour: 4 hours

Season(s) Service: afternoon departures year-round, daily, and additional morning departures June – October.

Average Headways:

Weekdays: *not available*
Weekends: *not available*

Average Stop Times: *not available*

Maximum Passenger Loads: *not available*

Staffing: 1 ticket sales staff at Union Station sales kiosk

Visitor Experience

Guide/Interpretation Type: *not available*

Cost/Passenger:

Adult: $30.00
Child: $15.00
Senior: n/a

Vehicle Characteristics: motorcoach

Ticketing Structure: Tickets can be purchased at Union Station, from a Gray Line booth on the parking level, and in advance on-line.

Service Marketing: Service is advertised on-line (http://www.grayline.com).

Description: Some stops are made and passengers may disembark; however, passengers must re-board the same vehicle within the allotted stop time to progress with the tour. This tour makes three (3) stops at the US Marine Corps Memorial (Iwo Jima), the Lincoln, Korean War and Vietnam Veterans War Memorials (combined stop), and Arlington National Cemetery. Union Station sales kiosk and stop located in parking level at the rear of the station.

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4. Mount Vernon & Old Town Alexandria

Scope of Service

Areas Served

Anacostia/East Capital
Arlington Cemetery
Dupont Circle
Embassy Row
Georgetown
Kennedy Center
MCI/Convention Center
Monumental Core
National Cathedral
National Mall
Rock Creek Park/Zoo
White House
U.S. Capitol
✓ Union Station
✓ Other(s): Christ Church, Mount Vernon Estate and Gardens, Alexandria, VA, Fort Washington, the Pentagon and Crystal City, VA.

Estimated Ridership: *not available*

Details of Service

Hours of Operation (peak season):

Weekdays: 8:30 a.m. and 2 p.m.
Weekends: same

Length of Tour: 4 hours

Season(s) Service: afternoon departures year-round, daily, and additional morning departures June – October.

Average Headways:

Weekdays: *not available*
Weekends: *not available*

Average Stop Times: *not available*

Maximum Passenger Loads: *not available*

Staffing: 1 ticket sales staff at Union Station sales kiosk

Visitor Experience
Guide/Interpretation Type: *not available*

Cost/Passenger:
Adult: $30.00
Child: $15.00
Senior: n/a

Vehicle Characteristics: motorcoach

Ticketing Structure: Tickets can be purchased at Union Station, from a Gray Line booth on the parking level, and in advance on-line.

Service Marketing: Service is advertised on-line (http://www.grayline.com).

Description: This tour makes limited stops at Christ Church and Mount Vernon Estate and Gardens; all other sites are viewed from the motorcoach.

Gray Line / Martz motorcoach parked at the Union Station terminal.

Operator 3: Gross National Product
The Scandal Tour is a unique tour of political scandal history in Washington, DC hosted by performers from the local comedy group Gross National Product (GNP). This tour provides an overview of the more famous political scandals, the political figures involved and often the site(s) where the scandals unfolded. The tour is only given to small groups and is somewhat informal and more interactive as a result. The tour, the only tour GNP offers, makes only two stops at the Watergate complex and at the former Capitol Hill home of Presidential candidate Gary Hart.

This tour is given on Saturdays only from April – September only.

Scandal Tour

Scope of Service
Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- ✓ Dupont Circle
- ✓ Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- ✓ National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ U.S. Capitol
- Union Station
- ✓ White House
- ✓ Other(s): Capitol Hill, Banneker Circle/L'Enfant Promenade

Estimated Ridership: *not available*

Details of Service
Hours of Operation (peak season):
Weekdays: n/a
Weekends: 1 p.m.

Length of Tour: 1.5 hours

Season(s) Service: April – September*

Average Headways:
Weekdays: n/a
Weekends: n/a

Average Stop Times: 15 minutes

Maximum Passenger Loads: est. 5 / vehicle

Staffing: 1 driver/guide

**Season of service may vary depending upon tour schedule of GNP comedy group members.*

Visitor Experience
Guide/Interpretation Type: The guide provides a comedic interpretation of local scandal lore occasionally accompanied by taped audio presentations (e.g. mock sound bites from scandalous political figures). The tour does not provide any in-depth political or local history, but instead concentrates on high-profile comedic scandals.

Cost/Passenger:
Adult: $30.00
Child: n/a
Senior: n/a

Vehicle Characteristics: Individual van

Ticketing Structure: Tickets must be purchased in advance over the phone.

Service Marketing: Service is advertised on-line (http://www.gnpcomedy.com). The website includes a map of the tour sites and mock sound bites from some of the highlighted scandalous figures.

Description: This tour's interpretation focuses primarily on high-profile political scandals, and does not provide any overall introduction to the area. The political scandal focus does provide the opportunity for the rider to view some areas that are not typically included on other general tours, such as Capitol Hill. While the tour only makes two formal stops, the smaller vehicle allows the driver/guide to slow down and easily negotiate traffic to allow riders viewing opportunities for many area sites, such as the White House, the memorials, and the Tidal Basin. Among others, the covered tour scandals include: Watergate, a variety of Clinton Scandals (Monica Lewinski and Whitewater), Mary Todd Lincoln's insanity, Iran-Contra, Representative Wilbur D. Mills and Fanne Foxe, and former Mayor Marion S. Barry Jr.

C. Approximate Comparables

As discussed in *Section I.B* of this report, the definition of comparable tours includes regularly scheduled services offering interpretive presentations of local destinations provided by an individual or group and which inherently provide transportation to more than one individual. Within the category of comparable tours, based upon price range of approximate comparables to Tourmobile are any tours which fall within the range of free to ≤ $15 or within the range of ≥ $31 and ≤ $50. There are fifteen (15) operators offering tours which fit within the definition of approximate comparable. Three (3) of those operators, Capitol River Cruises, Bike the Sites, and Historic Tours of America are summarized below. These operators provide a total of 6 different approximate comparable tours.

The range of tours offered within the approximate comparables category is more broad. Tours include bicycle, boat, motorcoach tours. The boat tours in this category include tours with food service and entertainment in addition to tours of sites along the Potomac waterfront. Additionally, some of the tours in this price range are regularly scheduled, but increasingly focused on providing charter transportation rather than significant interpretation. The operators summarized below, include three which fall at the more interpretive tours end of this spectrum. In some cases, such as the bicycle tours offered by Bike the Sites and the National Park Service, interpretation is more in-depth than the general overview interpretation offered with many of the primary comparable tours to Tourmobile in the above section of this report.

With the exception of the free bicycle tours given by the National Park Service, the majority of approximate tours range in cost between $31 - $50 for adults. School groups and children's groups were one of the largest markets served by the approximate comparable tour operators.

Table 9: Approximate Comparables
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Table 9: Approximate Comparables
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Operator 1: Capitol River Cruises

This non-stop boat tour includes an overview of sites as the boat moves south along the Potomac River from the Georgetown Harbor to Hains Point/ East Potomac Park. The return trip north on the Potomac River is not narrated but provides a second opportunity to view the sites. The tour boat serves snacks, sodas and alcoholic drinks as well to tour participants. The captain provides the interpretation and tour participants can move freely about the boat. Seating includes chairs in the bow of the boat, not covered, and tables and chairs in the stern of the boat, that is covered. The stern of each boat can be sealed with clear plastic flaps in case of rain. These boats were originally designed in the 1950s as ferry boats for service on the Great Lakes.

Peak season for Capitol River Cruises is the summer. Much of the market served by Capitol River Cruises is children's day care/camp groups in the summer months. Capitol River Cruises maintains loose relationships with surround school districts to provide a field trip program. These tours are offered at a student rate. Group and student rates generally range from 30-40 percent discounted. Public business hours begin at noon, and school/children's group tours are run in the morning. In the fall Capitol River Cruises provides many tours to international, primarily European, and seniors travel groups. Groups and charter services account for roughly 40 percent of sales, and walk-up business accounts for 50 percent. The remaining 10 percent of sales comes from snack/drink sales. Charter services range in cost from $300 - $400/hour.

Capitol River Cruises

Scope of Service

Areas Served

- Anacostia/East Capital
- ✓ Arlington Cemetery
- Dupont Circle
- Embassy Row
- ✓ Georgetown
- ✓ Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- National Mall
- Rock Creek Park/Zoo
- U.S. Capitol
- Union Station
- White House
- ✓ Other(s): Ronald Reagan National Airport, 14th Street, Arlington Memorial, and Theodore Roosevelt Bridges, Theodore Roosevelt Island, Netherlands Carillon and the Pentagon.

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):
Weekdays: 12 p.m. – 9 p.m.
Weekends: same

Length of Tour: 1.5 hours

Season(s) Service: April - October

Average Headways:
Weekdays: 1 hour
Weekends: 30 minutes

Average Stop Times: n/a

Maximum Passenger Loads: 91 on the Nightingale II and 109 on the Nightingale I.

Staffing: 1 guide / captain and 1 crew member / café staff and one staff in the ticket booth at the Washington Harbor

Visitor Experience

Guide/Interpretation Type: 1 guide/captain

Cost/Passenger:
Adult: $10.00
Child: $5.00
Senior: n/a

Vehicle Characteristics: 90 + passenger open boat with captain's cabin. 2 boats in the fleet, and both are diesel powered.

Ticketing Structure: Tickets are purchased at Washington Harbor.

Service Marketing: Service is advertised on-line (http://www.capitolrivercruises.com).

Description: The tour focused on general history of the city, Arlington National Cemetery and the monuments as well as the history of the bridges crossing the Potomac.

Operator 2: Bike the Sites

Bike the Sites is the only company offering guided bicycle tours to the Washington, DC area sites. In addition to customized tours, available regularly scheduled Bike the Sites interpretive tours include: Capital Sites, Mount Vernon, Bridges of Washington and Civil War Statutes. Each of these tours is a comparable tour to the tour service offered by Tourmobile; however, only the Capital Sites is summarized. The tour company typically provides the Capital Sites tour twice daily, but also offers tour times in the early morning (Beat the Heat) and evening (Sites @ Nite) to avoid the summer heat as demanded. The tour price includes bicycle rental, helmet, water bottle and snack in addition to guided interpretive services.

The Capital Sites tour is the most popular tour offered and Bike the Sites provides bicycle tour services to an average of [redacted] visitors/day during the week, and [redacted] visitors/day during the weekend. An estimated 50 percent of Bike the Sites business is from corporate bookings and the remainder is a mix of tourists and local residents, many of which are repeat customers hosting out-of-town guests. Also included in the group bookings are a large number of school and other children-oriented groups. The tour guide to visitor ratio is kept around 1 to 15, and larger tour groups are parceled into smaller groups to keep the tour size manageable.

The smaller tour size of the Bike the Sites tours, as well as the flexible nature of the transportation mode allow for frequent stops, and personal interaction with the tour guide. The bicycle as the means of transportation also allows the tour to experience the sites in a non-typical manner, riding through West and East Potomac Parks between the FDR Memorial and the Jefferson Memorial along the Tidal Basin for example. This allows the tour to pass through the memorials and tour sites as one seamless tour, rather than off and on of a vehicle and into the sites.

All tours begin from the Bike the Sites base of operations and facilities located at the Old Post Office Tower Pavillion. Bike the Sites operators indicate that bicycle tours often appeal to many European visitors who may be more familiar and comfortable with touring on bicycles, an example of Bike the Sites particular edge in this market is the popularity of Bike the Sites tours and relationship developed between the company and the European airline stewards and pilots often looking for a tour while laying over in the Washington, DC area. Bike the Sites provides discounts to this group as well as to Military personnel and some corporate clients.

Bike the Sites tours are available year-round on demand, and baring inclement weather, such as snow or ice; however, the primary season is from March to December.

Additionally, tandem and pedal cabs, similar to a bicycle-drawn open coach, are available for handicapped tour participants.

Capital Sites

Bike the Sites stopped at the Lincoln Memorial.

Scope of Service

Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- Dupont Circle
- Embassy Row
- Georgetown
- Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ U.S. Capitol
- Union Station
- ✓ White House
- ✓ Other(s): Old Post Office Tower and Albert Einstein Memorial

Estimated Ridership: [redacted]

Details of Service:

Hours of Operation (peak season):
Weekdays: 9 a.m. – 5 p.m.*
Weekends: same

Length of Tour: 3 – 3.5 hours

Season(s) Service: March - December

Average Headways:
Weekdays: n/a
Weekends: n/a

Average Stop Times: n/a

Maximum Passenger Loads: n/a

Staffing: 1 guide / 15 visitors and several support staff in tour office

** Hours of tours offered only – bike rental and exercise tour hours may not be the same.*

Visitor Experience

Guide/Interpretation Type: Guide leads tours and provides interpretation at frequent stops, in addition to directing navigation of tour group through pedestrian areas. The tour focused on providing the National Mall and the Memorial Core with historical interpretation of buildings and memorials and monuments. The tour covered some non-traditional tour stops including the Albert Einstein Memorial and an up-close examination of the architecture of the National Gallery of Art.

Cost/Passenger:
Adult: $40.00*
Child: $30.00
Senior: n/a

Vehicle Characteristics: Individual and tandem bicycles.

Ticketing Structure: Tickets are currently reserved with a credit card over the phone or in person at the Bike the Sites location at Old Post Office Tower. Bike the Sites is working toward an on-line reservation system soon as well.

Service Marketing: Service is advertised on-line (http://www.bikethesites.com) as well as having some partner restaurants affiliations, such as the District ChopHouse & Brewery, which boasts a Bike the Sites microbrew.

**Discounts are offered if a bicycle rent is not required.*

Description: Navigating heavily pedestrian areas presented some challenges for bicycle tour participants, especially at the Lincoln, Vietnam Veterans and Korean War Memorials and in some areas along the National Mall. However, the tour route was rarely co-located with traffic on streets affording participants a more generally comfortable and safe route. The tour does navigate across Constitution and Independence Avenues and 15th, 14th and 12th Streets while riding through the Memorial Core.

Tour also includes complimentary snack and bottle of water along with bicycle and helmet rental. Energy bar snack is distributed by guide mid-way through the tour, and the bottle of water also includes a coupon to area partner restaurants and vendors.

Bike the Sites tour stopped at the Albert Einstein Memorial.

Operator 3: Historic Tours of America (Old Town Trolley)

Historic Tours of America operates one approximate comparable interpretive tour in the Washington, DC area, the Washington, DC Express Tour. This tour is shorter than the other available Historic Tours of America tours and specifically targets those visitors with less time available to view the sites.

In addition to the Washington, DC area, Historic Tours of America also operates tours in San Diego, CA, Key West, FL, St. Augustine, FL, Boston, MA and Savannah, GA. The company facilitates the host-visitor phenomenon by offering a "Hometown Pass" via on-line registration for those persons who live in any of the six areas served by Historic Tours of America. This pass for use on any of Historic Tours of America tours is free to the resident when accompanied by a paying visitor, making it more likely that the host will bring his/her guests business to Historic Tours of America. Additionally, all tickets purchased on-line for any tour are given a 10 percent discount. Tour vehicles are also available for private charter tour use.

Peak seasons generally correspond with the summer months, June – August, as well as heavy volumes in spring, such as the Cherry Blossom festival and school spring breaks.

Washington, DC Express Tour

Scope of Service

Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- Dupont Circle
- Embassy Row
- Georgetown
- ✓ Kennedy Center
- MCI/Convention Center
- ✓ Monumental Core
- National Cathedral
- ✓ National Mall
- Rock Creek Park/Zoo
- ✓ U.S. Capitol
- ✓ Union Station
- ✓ White House
- Other(s)

Estimated Ridership: ridership not yet documented

Details of Service

Hours of Operation (peak season):

Weekdays: 11:30 a.m. – 5:30 p.m.
Weekends: same

Length of Tour: 1 hour

Season(s) Service: year round, daily service

Average Headways:
Weekdays: 90 minutes
Weekends: same

Average Stop Times: n/a

Maximum Passenger Loads: 35/coach

Staffing: 1 driver/guide

Visitor Experience
Guide/Interpretation Type: driver/guide

Cost/Passenger:
Adult: $15.00
Child: $10.00
Senior: n/a

Vehicle Characteristics: 30+ passenger motorcoach. Not alternative fueled. 2 coaches in the fleet. No low-floor, kneeling or wheel chair capabilities.

Ticketing Structure: Tickets are purchased either on-line or at Union Station, the departure point.

Service Marketing: Service marketed on-line (http://www.historictours.com) and at Historic Tours of America kiosk in Union Station. This is a new tour targeting visitors with only a short amount of time available, but are interested in seeing some of the city sites.

Description: No stops are made; this is a continuous tour. This tour began operating in the summer of 2003. Note: Usually one coach in service for Express Tour and remaining coach provides shuttle services between Arlington/Crystal City hotels to the Lincoln Memorial connecting Virginia tourists for free to Historic Tours of America tours. This shuttle service operates once in the morning and once in the evening only.

D. Least Comparable Services

As discussed in *Section I.B* of this report, the definition of comparable tours includes regularly scheduled services offering interpretive presentations of local destinations provided by an individual or group and which inherently provide transportation to more than one individual. Within the category of comparable tours, based upon price range of least comparables to Tourmobile are any tours which are ≤ $51. There are seven (7) operators offering tours which fit within the definition of least comparable. One of these operators is summarized below, The Centre for Counterintelligence and Security Studies SpyDrive.

The range of tours offered within the least comparables category is also more broad than the primary comparable tours. Tours include bicycle, kayak, boat, motorcoach tours. The majority, eight (8) of twelve (12) of the least comparable tours are extended tours to outlying sites, such as Williamsburg, and often provided via motorcoach.

Table 10: Least Comparables
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Operator 1: Centre for Counterintelligence and Security Studies (CI Centre)
SpyDrive is an in-depth, non-stop tour of espionage history and related sites offered once a month to the public and hosted by espionage professionals, a retired counter-intelligence officer, agents and even the Executive Director of the International Spy Museum in Washington, DC. The Centre for Counterintelligence and Security Studies (CI Centre) does not offer any other land tours, nor is this service offered in any other city. SpyDrive is offered to individuals and non-charter groups of any size only one Saturday each month; the remainder of SpyDrive's business comes from charter tours of 20 – 25 persons. The tour focuses on presenting several hours of espionage history, anecdotes and interpretation of sites, and does not provide any non-espionage related interpretation, or information.

The CI Centre has offered this tour for two years; however, the main role of this institution is to provide security and counter intelligence training. Charter tours account for approximately 70 percent of CI Centre's tours. The CI Centre does not maintain any specific relationships with other tour or visitor groups. Many of these groups are often working with local tours in a lower price range than SpyDrive. The CI Centre also indicates that the higher cost associated with SpyDrive reflects the highly experienced hosts and level of interpretation presented. The CI Centre does not own any vehicles but contracts with transportation providers to facilitate the SpyDrive.

The CI Centre also conducts SpyCruise and in the future plans to offer SpyRetreat. Both are extended trips with in-depth presentations and seminars.

SpyDrive

Scope of Service
Areas Served

- Anacostia/East Capital
- Arlington Cemetery
- ✓ Dupont Circle
- ✓ Embassy Row
- ✓ Georgetown
- Kennedy Center
- ✓ MCI/Convention Center
- Monumental Core
- ✓ National Cathedral
- National Mall
- Rock Creek Park/Zoo
- U.S. Capitol
- Union Station
- ✓ White House
- ✓ Other(s): FBI Bldg., Sheridan Circle, and Cathedral Heights (Russian Embassy)

Estimated Ridership: [redacted]

Details of Service

Hours of Operation (peak season):
Weekdays: n/a
Weekends: 9:30 a.m.

Length of Tour: 3 hours

Season(s) Service: all year

Average Headways:
Weekdays: n/a
Weekends: n/a

Average Stop Times: n/a

Maximum Passenger Loads: est. 65 / coach

Staffing: 1 driver, 1 organizer and 2 guides

Visitor Experience

Guide/Interpretation Type: The tour is primarily guided by one of the hosts and supporting anecdote/alternate view is added by additional host. The interpretation is non-stop from one site to the next and covers some overall education of espionage operations in addition to specific historical events in the Washington, DC area. More than 35 sites are included in the tour. Tour was hosted by espionage professionals, a retired U.S. Army counter-intelligence officer and a retired, former high-ranking KGB agent.

The audio presentation is augmented by a visual presentation on overhead monitors, and a hand-out glossary of names and terms. The visual presentation compliments the interpretation by presenting photos, video clips (e.g. film footage of McCarthy trials) and reiterating names, dates and facts.

Cost/Passenger:
Adult: $55.00
Child: $30.00
Senior: n/a

Vehicle Characteristics: Enclosed motorcoach with restroom facilities and video monitors. Seats are individual and cushioned. Coaches to accommodate handicapped visitors can be provided.

Ticketing Structure: Tickets must be purchased in advance either on-line or through Ticketmaster.

Service Marketing: Service is advertised on-line (http://www.spydrive.com).

Description: In relating the local espionage lore, the tour also gives an unconventional tour of the District of Columbia, including many sites and areas not served by other tours. In turn, many of the more traditional tourist destinations are not viewed on this tour, including the Monumental Core, the National Mall or the U.S. Capitol.