

GLEN CANYON NATIONAL RECREATION AREA

RIVER FLOAT TRIP COMPARABILITY SURVEY



AUGUST/SEPTEMBER 2007

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INTRODUCTION

2007 RIVER FLOAT TRIP COMPARABILITY ANALYSIS GLEN CANYON NATIONAL RECREATION AREA

The following river float trip comparability analysis was completed by Business Management to obtain a base for future rate requests/approvals for food and beverage operations.

On August 30, 2007 through September 2, 2007, representatives from the National Park Service (NPS) and Colorado River Discovery, LLC (CRD) visited river rafting companies in Utah and Idaho. The potential comparable locations offering river raft/float trip services were determined jointly by NPS and CRD prior to the on-site visits.

The survey team included the following individuals:

Jacki Blais, Concessions Management Specialist, Glen Canyon NRA
Lou Good, Chief of Business Management, Glen Canyon NRA
Scott Seyler, Operating Partner, Colorado River Discovery, LLC

This comparability analysis and survey was compiled in accordance with the National Park Service Concessions Management Improvement Act of 1998, P.L. 105-391, 112 Stat. 3596, 16 U.S.C. which states:

Sec. 406. Reasonableness of Rates.

Sec. (a). Each concession contract shall permit the concessioner to set reasonable and appropriate rates and charges for facilities, goods, and services provided to the public, subject to approval under subsection (b).

Sec. (b). A concessioner's rates and charges to the public shall be subject to approval by the Secretary. The approval process utilized by the secretary shall be as prompt and as unburdensome to the concessioner as possible and shall rely on market forces to establish reasonableness or rates and charges to the maximum extent practicable. The Secretary shall approve rates and charges that the Secretary determines to be reasonable and appropriate. Unless otherwise provided in the contract, the reasonableness and appropriateness of rates and charges shall be determined primarily by comparison with those rates and charges for facilities, goods, and services of comparable character under similar conditions, with due consideration to the following factors and other factors deemed relevant by the Secretary: length of season, peak loads, average percentage of occupancy, accessibility, availability and costs of labor and materials, and type of patronage. Such rates and charges may not exceed the market rates and charges for comparable facilities, goods, and services, after taking into account the factors referred to in the preceding sentence.

In addition, the 2006 National Park Service Management Policies, Chapter 10, provides the following guidance:

10.2.4.7 Rates.

The National Park Service must approve all rates charged to visitors by concessioners. The reasonableness of a concessioner's rates and charges to the public will, unless otherwise provided in the contract, be judged primarily on the basis of comparison with current rates and charges for facilities and services of comparable character under similar conditions. Due consideration will be given to length of season, provision of peak loads, average percentage of occupancy, accessibility, availability and costs of labor and materials, type of patronage and other factors deemed significant by the NPS Director.

There are six rate approval methods that the Superintendent may use when reviewing a concessioner's rate request. Each of these methods conforms to and is in compliance with the The Concessions Policy Act of 1998 (PL 105-391). The rate approval method used for this survey is the Direct Comparability Method.

The Direct Comparability Method consists of two processes; the Full Review and the Limited Review. The Full Review is the process used for this comparability survey and required that the NPS collect extensive information from businesses outside of the park that were identified as potential comparables and most similar to the concession operation. This information was analyzed and those properties determined to be most similar will be used as actual comparables in the assessment of concessioner's rate requests.

On-site visits to collect information included the following potential comparable facilities:

- | | |
|----------------------------------|-----------------------|
| 1. Wild River Expeditions | Bluff, Utah |
| 2. Moab Adventure Center | Moab, Utah |
| 3. Tag-A-Long Expeditions | Moab, Utah |
| 4. Adrift Adventures | Moab, Utah |
| 5. NAVTEC Expeditions | Moab, Utah |
| 6. Cascade Raft and Kayak | Horseshoe Bend, Idaho |
| 7. Exodus Wilderness Adventures | Riggins, Idaho |
| 8. Epley's Whitewater Adventures | Riggins, Idaho |
| 9. Salmon River Experience | Riggins/Moscow, Idaho |
| 10. Northwest Voyageurs | Pollock, Idaho |

II. SELECTION OF COMPARABLES METHODOLOGY

As directed by Director's Order NPS-48 4.3 Rate Approval Program, a list of five (5) separate criteria were used to determine which of the facilities/operations visited, would be selected as most similar/comparable to the concessioner's operations. These criteria have numeric values and when added together support decisions in determining the most similar/comparable facilities.

1. **Competition**
2. **Seasonality**
3. **Similar Clientele**
4. **Similarity of Operations**
5. **Transportation***

Also included is a review of extra quality features. These are additional features/attributes that add merit, but are not assigned a numeric value. Extra quality features for both the concessioner and the potential comparables are documented. Extra quality features are not intended to be used in the process of selecting actual comparables but only to analyze the variables between the actual comparables.

- Employee training, i.e., guide, interpretation, first aid/CPR
- Fees (use fees, i.e., BLM, USFS, etc.)
- Cancellation Policy (24, 36, 48, 72 hours)
- Deposits

As part of the analysis it is important to go over several differences/distinctions relative to raft trips and passenger transportation that will play a primary role in future rate reviews/approvals.

Colorado River Discovery (CRD) provides float trips on a 15-mile flat water river section, whereas, the other companies operate primarily on whitewater sections.

CRD's river trips are fully motorized up and down the river. Based on Environmental Protection Agency (EPA) guidelines, the company uses the most efficient and environmentally-friendly technology in motors that are on the market today. Operating costs using this type/size of motor are much higher for CRD than companies that may use smaller motors to navigate through short distances of flat water/eddy river sections or for totally oared trips.

Several companies transport their passengers greater distances to launch or from take out locations than CRD, while other companies in close proximity of river launch/take out sites do not incur the additional transportation costs. Many of the companies use large passenger vans instead of buses to transport their customers, whereas, CRD uses only bus transportation.

CRD is limited by contract to a specific boat number for their operations, while the other companies are limited to number of launches and/or passengers.

The following river rafting/float operations were selected based on the criteria as the most similar/comparable to Colorado River Discovery, LLC river float operations:

- | | |
|----------------------------------|-----------|
| 1. Moab Adventure Center | 91 Points |
| 2. Epley's Whitewater Adventures | 87 Points |
| 3. Wild River Expeditions | 86 Points |
| 4. Tag-A-Long Expeditions | 84 Points |
| 5. Adrift Adventures | 84 Points |
| 6. NAVTEC Expeditions | 84 Points |
| 7. Exodus Wilderness Adventures | 82 Points |
| 8. Salmon River Experience | 82 Points |

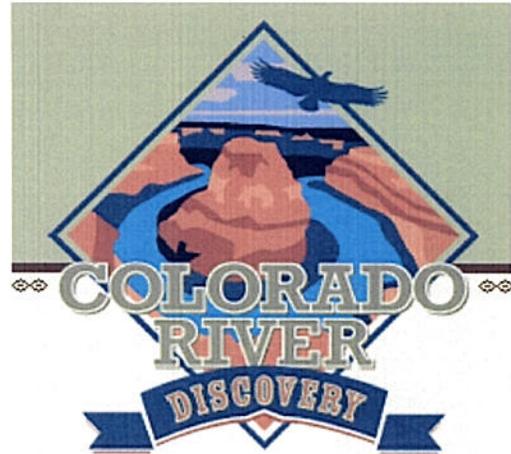
*******Comparability Cut-off*******

- | | |
|----------------------------|-----------|
| 9. Northwest Voyageurs | 79 Points |
| 10. Cascade Raft and Kayak | 74 Points |

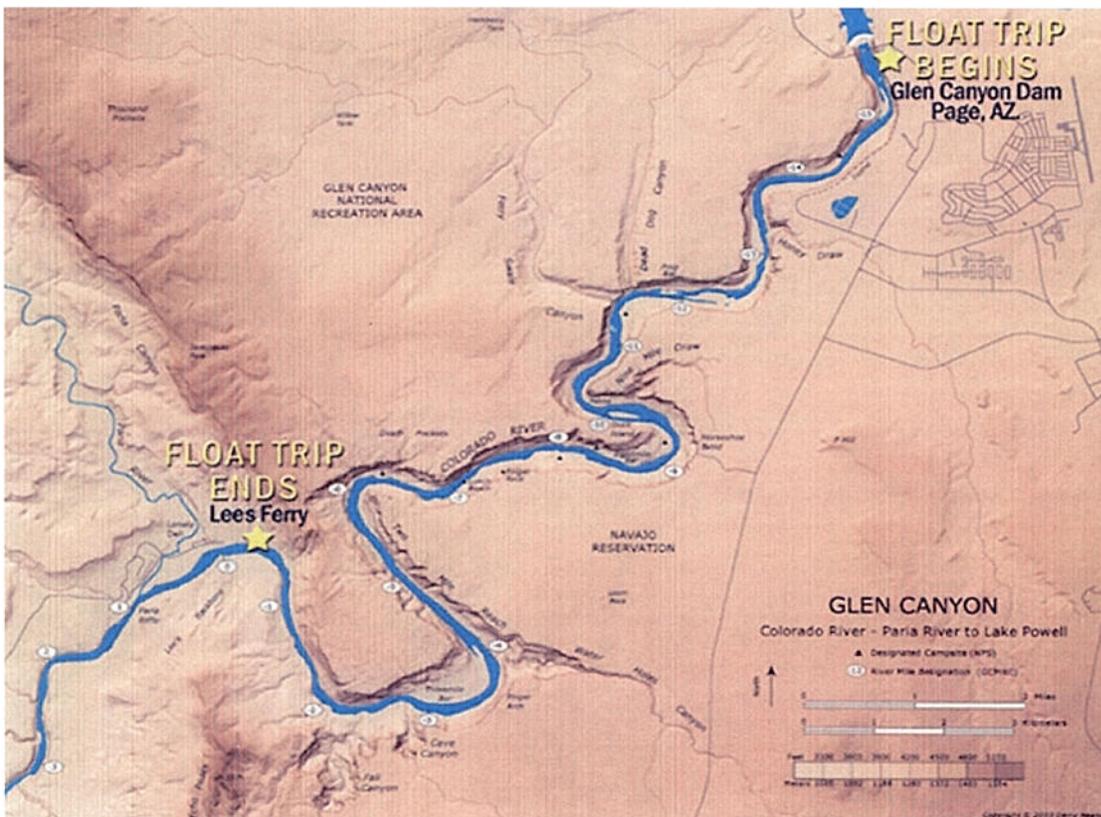
III. COLORADO RIVER DISCOVERY, LLC

Colorado River Discovery, LLC
P.O. Box 575
130 6th Avenue
Page, Arizona 86040
Phone: (928) 645-9175
Fax: (928) 645-9178
Toll Free: (888) 522-6644

www.raftthecanyon.com



Colorado River Discovery, LLC provides the following visitor services within Glen Canyon National Recreation Area: motorized guided interpretive half, full and specialty river raft trips on the 15-mile stretch of the Colorado River beginning just below Glen Canyon Dam and ending at Lees Ferry. In addition, the company also provides backhauling services up river for kayak/canoe customers. Trips begin March 1 and continue through November 30 of each year. Transportation from Colorado River Discovery's office location in the city of Page is included in the guided river trips. The company provides all the equipment necessary for the trips and includes water and soft drinks. For the full day and/or longer specialty trips a full deli-style lunch is provided.



2007 RIVER FLOAT TRIP COMPARABILITY STUDY

The following criteria are used to determine comparability when using the direct full review approval method of rate approval.

COMPARABLE OPERATIONS	CRD	Wild River Exped.	Moab Adv. Center	Tag-A-Long Expeditions	Adrift Advent.	NavTec Expeditions	Cascade Raft/Kayak	Exodus Wild Riv	Epley's Whitewater	Salmon Riv Exp	Northwest Voyageurs
1. COMPETITION (10)		10	10	10	10	10	10	10	10	10	10
2. SEASONALITY 5 months or more (10) less than 5 months (5)	10	10	10	10	10	10	5	10	10	10	10
3. SIMILAR CLIENTELE Vacationing public (10) Business (5) Local (3)	10	10	10	10	10	10	10	10	10	10	10
4. SIMILARITY OF OPERATIONS A. Length of Tours Half day/Full day (specialty) (10) Multiple days only (5) B. Equipment Frame w/pontoons (10) Raft w/frame (5) C. Propulsion Motor (10) Oar/Motor (7) Oar/paddle (5) D. Size of Fleet 20 or more (10) 19 or less (5) E. Point of Origin deadhead back (10) transport (7) disassemble transport (5)	10 10 10 10 10 10 10 10 10	10 5 7 10 5 7 10 5 7									
5. TRANSPORTATION leased (10) owned (5) A. Number of Miles 25 or more (10) 24 or less (5) B. Vehicle Size Bus (10) Van/Bus (7) Other (5)	10 10 10 10 10	5 10 7 5 7									
TOTAL CRITERIA POINTS	100	86	91	84	84	84	74	82	87	82	79

Wild River Expeditions
P.O. Box 118
101 Main Street
Bluff, Utah 84512
Fax: (435) 672-2365
Toll Free: (800) 422-7654



www.riversandruins.com

Wild River Expeditions located in Bluff, Utah has been in business for 50 years. The company offers guided interpretive one-day and multiple-day river trips on the San Juan River. Wild River's season is March through October. During that time they offer one-day trips on a daily basis and launch three to five multiple-day trips per week. Trips are oared/rowed trips with the use of a small 8 hp motor for flat water areas.

Trips can be reserved by telephone or email with advance reservations recommended. A one-third deposit (trip cost) is required to confirm space, with balance due thirty days prior to the launch date. Deposit refunds are available when written cancellations are made at least 30 days prior to launch date. A Bureau of Land Management (BLM) per



person access/user fee is an additional charge and is based on trip length; i.e., \$6 per person fee for one-day trips. Multi-day per person fee ranges from \$12 to \$18. The company uses passenger vans for land transportation to river launch areas and return. The mileage ranges from approximately 4 miles up to 70 miles.



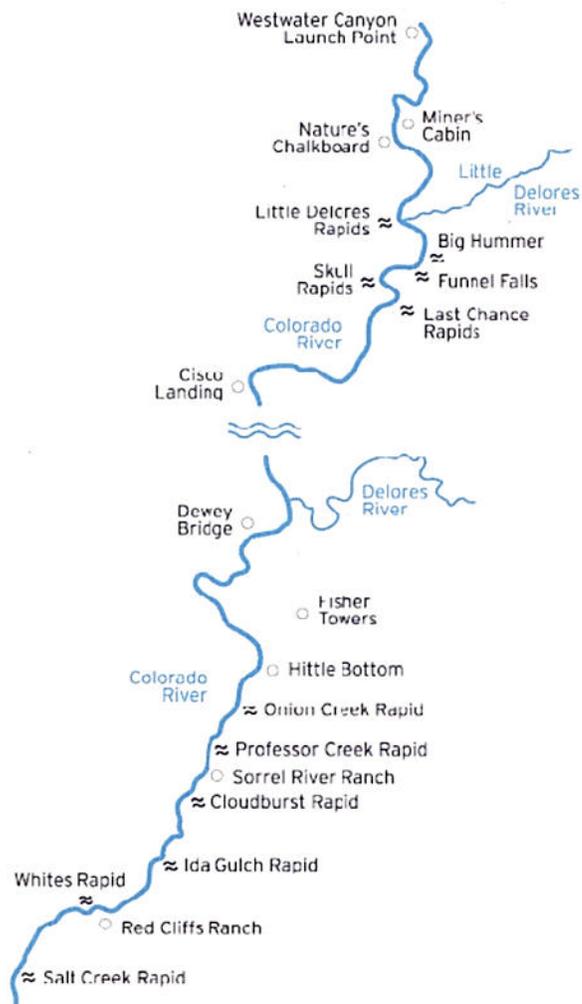
Moab Adventure Center
225 South Main Street
Moab, UT 84532
Phone: (435) 259-7019
Fax: (435) 259-8110
Toll Free: (888) 622-4097

www.moabadventurecenter.com



Moab Adventure Center offers many guided tour services including river rafting trips. The company is located in Moab, Utah and offers half-day, one-day and multiple-day river trips on the Colorado River section outside of Moab. They offer both oared and paddled raft trips that can be booked in advance by telephone a full-fare deposit with a 48-hour cancellation policy. No refund will be given if canceled less than 48 hours. A Bureau of Land Management (BLM) 3% access fee is charged to river users on one or multiple-day trips. Moab Adventure Center offers children and 10% senior citizen discounts as well.

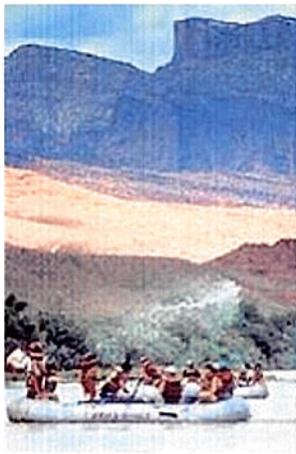
Trips are offered on 16-foot rafts that accommodate up to 10 passengers per raft. Visitors are transported by vehicle 40 or more miles to river access and then back to the Moab Adventure Center depending on the trip.



Tag-A-Long Expeditions
452 North Main Street
Moab, UT 84532
Phone: (435) 259-8946
Fax: (435) 259-8990
Toll Free: (800) 453-3292

www.tagalong.com

Tag-A-Long Expeditions business for more than 40 Colorado and Green Rivers company offers a combination half, full, and multiple day river trips on sections of the Colorado River. A non-refundable \$20 deposit is required for one and half day trips when making reservations. Final payment is due prior to departure. The Westwater day trip requires a non-refundable \$150 per person deposit. BLM per person \$7 fee is in addition to the individual trip fee. The company also offers a 5% senior citizen discount.



located in Moab, Utah has been in years providing river trips on the and in Canyonlands National Park. The of land and water based trips including

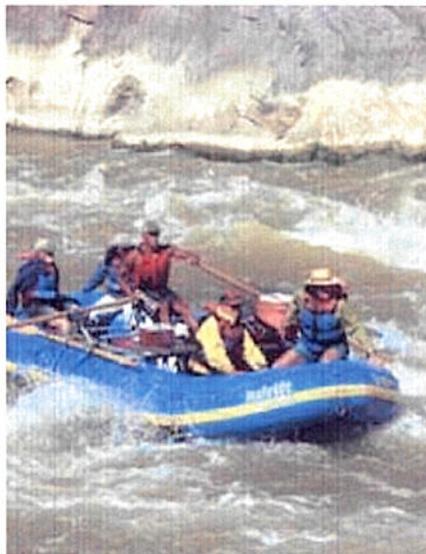
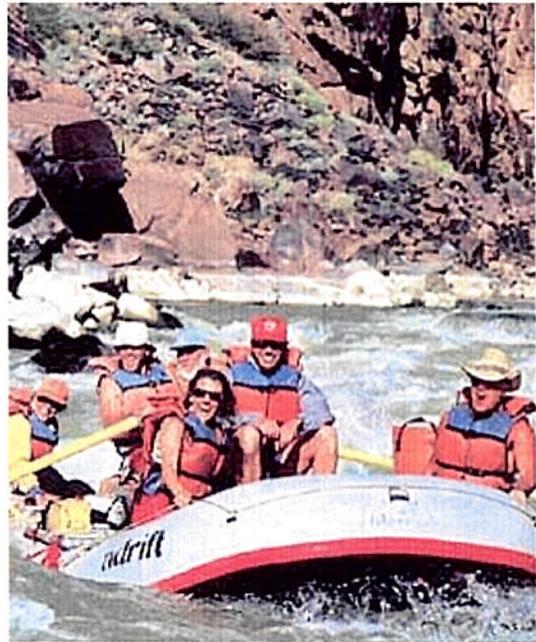


Adrift Adventures
378 North Main Street
Moab, UT 84532
Phone: (435) 259-8594
Fax: (435) 259-7628
Toll Free: (800) 874-4483

www.adrift.net

Adrift Adventures is based out of Moab, Utah. The company offers both land and water based trips and has operated for 29 years. The water based trips include half, full and multiple day river rafting trips that are rowed, oared or motorized trips and jet boat, dory boat and specialty trips.

Adrift Adventures reservation deposit and cancellation policy for half and full day rafting trips requires a \$10 per person deposit for confirmation that can be refunded if 24-hour notice from the departure time. The deposit is non-refundable if canceled 7 or less days of departure date. More multiple day trips a \$100 deposit is required with the balance due 45 days before departure date. The deposit is not refundable if trip canceled 44 days or less. The company offers group and family rate discounts. Adrift Adventures holds a permit with the Bureau of Land Management (BLM) and pays a percentage of annual gross receipts back to the agency.



NAVTEC Expeditions
321 North Main Street
Moab, UT 84532
Phone: (435) 259-7983
Fax: (435) 259-5823
Toll Free: (800) 833-1278

www.navtec.com

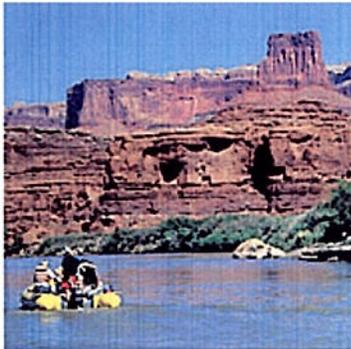


NAVTEC (Navigation Technologies) has operated for 35 years offering summer and winter adventures that are land and water based. The company, located in Moab, Utah, offers half, full and multiple day river rafting trips.

A \$15 per person deposit is required to hold reservations for both the half and full day Fisher Towers raft trip. Final payment is due 2 days prior to trip departure. Cancellations are

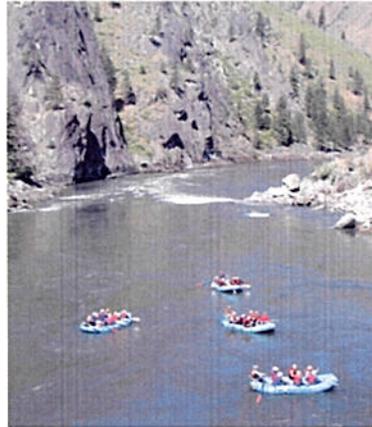


subject to a \$10 per person processing fee. No refunds within 48 hours of trip departure. Final payments are non-refundable. The full day Westwater Canyon raft trip requires a \$30 per person non-refundable deposit with the balance due 21 days prior to trip departure. Cancellations made 22 or more days prior to departure receive a full refund less the \$30 deposit. No funds within 21 days of departure.



Exodus Wilderness Adventures
606 N. Main Street
P.O. Box 1231
Riggins, ID 83549
Fax: (928) 628-4109
Toll Free: (800) 992-3484

www.riverescape.com



Exodus Wilderness Adventures is an Idaho based; family owned and operated river company located in Riggins, Idaho. The company offers river rafting trips on the Main and Lower Salmon River. Also, offered are jet boat tours and fishing trips as well as kayak instruction. Exodus offers half, full and multiple day rafting trips.



A 50% deposit is required when reserving trips with the balance due prior to the trip and can be paid when you arrive at the company's office. Children and Senior citizens age 65 and over

receive a 15% discount on trips, except on already discounted family or senior trips. The company requires a 48- hour cancellation notice. If notice is received, the deposit less 25% of total cost will be refunded. Cancellations later than 48 hours will result in loss of deposit. Trip cost does not include Federal Land Use Fee or guide gratuities. Exodus Wilderness Adventures provides the half- and full-day trips under a permit with the Bureau of Land Management (BLM) and pays a percentage of gross receipts back to that agency.



Epley's Whitewater Adventures
P.O. Box 1129
Riggins, ID 83549
Cell Phone: (775) 934-5081
Home/Fax: (775) 777-1069
Toll Free: (800) 233-1813

www.epleys.com



Epley's Whitewater Adventures located in Riggins, Idaho has been in business since 1962 offering half, full and multiple day river trips on sections of the Salmon River. The company's half day trips include snacks and beverages, while the full day trips include a full deli-style buffet lunch and a free souvenir Epley's t-shirt. Also offered is a deluxe Dinner Adventure, a full day trip ending with a steak dinner served at the company's headquarters overlooking the Salmon River.



The company's cancellation policy for its half and one day trips: if canceled 15 days prior to scheduled launch date will refund your trip fee less 50% service charge. Cancellations made less than 5 days of scheduled launch date are non-refundable. Trip prices do not include a 3% Bureau of Land Management (BLM) fee. Children 12 and under receive a 15 % discount of listed prices. Group discounts are also available on all trips.



Salmon River Experience
812 Truman
P.O. Box 9145
Moscow, ID 83843
Riggins Office: (208) 628-3014
Moscow Phone: (208) 882-2385
Fax: (208) 882-2385
Toll Free: (800) 892-9223

www.salmonriverexperience.com



Salmon River Experience has been in business for more than 20 years offering half, full and multiple river trips on the Main Salmon (Riggins, Idaho) and multiple day trips on the Main Salmon-Lower Gorge/Hells Canyon. The company operates out of two offices; Moscow, Idaho and the other in Riggins, Idaho.

A 50% per person deposit is required within 10 days of requested reservation. Reservations are confirmed upon receipt of a deposit. The balance of the trip is due no later than 4 weeks prior to trip. (Trips booked within the 4-weeks require full payment to confirm.) All trips are paid in advance. Written notice is required at least 10 weeks prior to launch date for a full refund, less \$25 per person cancellation fee. If notice is received between 4 and 10 weeks prior to launch date, a 50% forfeiture of trip price will be charged. No refunds can be given if canceled within 4 weeks of the trip. Trip price does not include a 3% Bureau of Land Management (BLM) Use Fee. The company offers children rates for ages 8-17 if accompanied by an adult. Group rates apply to groups of 8 or more.



Cascade Raft and Kayak
7050 Highway 55
Horseshoe Bend, ID 83629
Phone: (208) 793-2221
Fax: (208) 939-1899
Toll Free: (800) 292-7238

www.cascaderaft.com

Cascade Raft and Kayak located in Horseshoe Bend, Idaho owned and operated by the Long family has offered Idaho whitewater rafting trips since 1985. The company offers half and full day trips on the Main, North and Lower Fork sections of the Payette River. A 50% deposit is required to reserve your trip. The deposit is non-refundable if you cancel within 14 days of the scheduled trip. A 10% re-booking fee will be charged for any rescheduling. Rates do not include a 6% sales tax. The company provides trips under a permit on Bureau of Land Management (BLM) and United States Forest Service (USFS) river sections. Under an agreement between the two agencies Cascade Raft and Kayak pays a percentage of annual gross receipts to the USFS.



Northwest Voyageurs
HC2 Box 501
Pollock, ID 83547
Fax: (208) 628-4081
Toll Free: (800) 727-9977

www.voyageurs.com

Northwest Voyageurs based in Pollock, Idaho (10 miles south of Riggins, Idaho) is owner-operated offering a variety of outdoor adventures including half, full and multiple day whitewater rafting trips. The company offers river trips on both the Salmon and Snake Rivers.



The company's reservation system requires a \$40 non-refundable per person deposit for the half and full day trips to confirm the reservation. The full balance is due 60 days prior to the day trip. If trip is booked less than 60 days in advance, full payment is required when making the reservation. Groups of 12 or more



and children 12 and under receive a 10% discount. Discounts cannot be combined. All payments are non-refundable, however, if notified in writing at least 90 days prior to departure; the company will hold payments less the initial deposit for a period of one year. If notified less than 90 days prior to departure, all payments are forfeited. (Once you are signed up, the company loses the right to sell your seat to another individual) Northwest Voyageurs recommends purchasing travel insurance for all multi-day reservations.

