

MARKET AREA OVERVIEW

REGIONAL AND LOCAL MARKET AREA

The Bluffs Restaurant and Gift Shop is located in relatively remote area of the Park near the Virginia-North Carolina state line. On the Virginia side, the largest major cities in the surrounding area (with populations greater than 50,000) include Richmond, Roanoke and Lynchburg. On the North Carolina side, the larger nearby cities are Charlotte, Boone, Winston-Salem/Greensboro and Asheville.

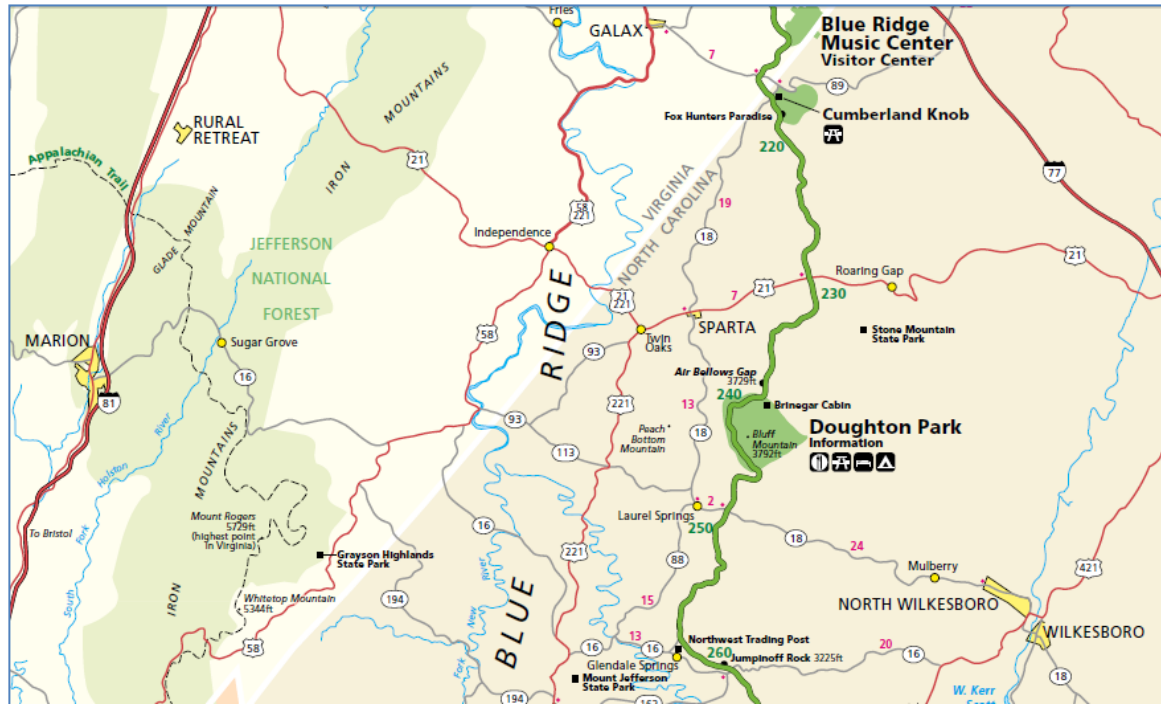
The following exhibit presents a map illustrating the location of the concession facilities under the Draft Contract within the greater regional area.

REGIONAL AREA MAP AND LOCATION OF CONCESSION FACILITIES



The following presents a more detailed map of the concession site. Doughton Park is located within Alleghany County, NC.

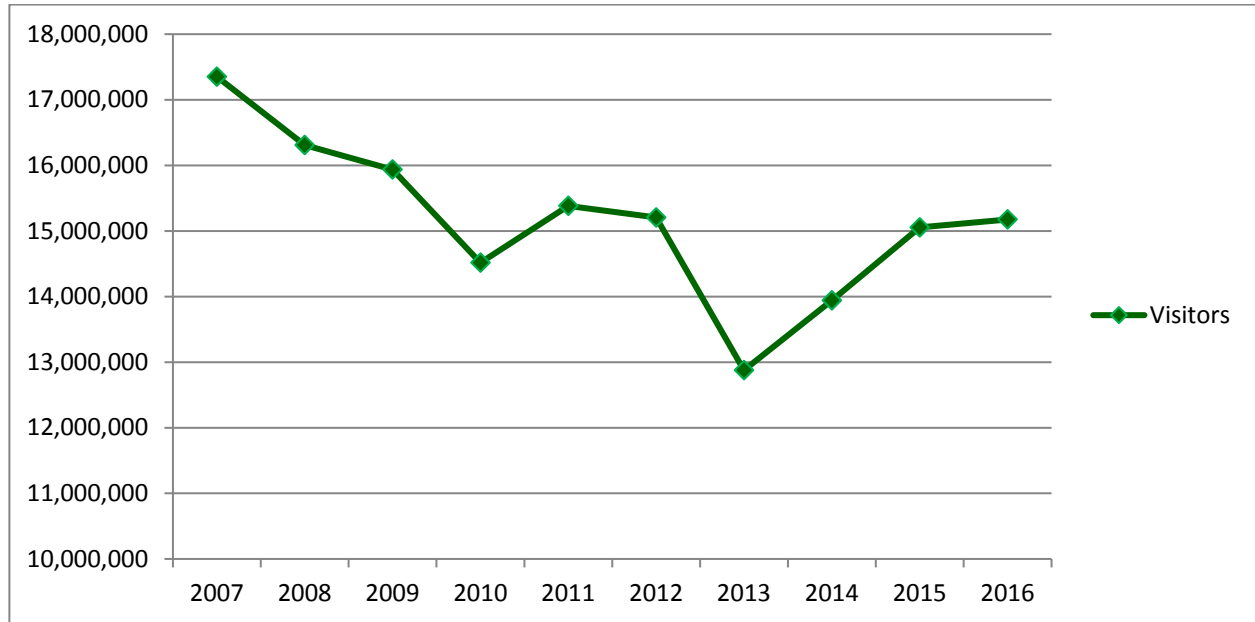
LOCATION OF DOUGHTON PARK CONCESSION FACILITIES (ROAD IS SHADED GREEN)



PARK VISITATION INFORMATION

The Service bases recreation visitor counts on data from traffic counters placed across multiple points along the Parkway. For more information on how the Service collects and reports recreation visitor counts, please visit <http://www.nature.nps.gov/stats/index.cfm>. The following exhibit depicts Parkway visitation trends over the 2007-2016 period.

BLUE RIDGE PARKWAY VISITATION, 2007-2016



Source: National Park Service

From 2007 to 2016, the Parkway averaged over 15 million visitors annually. Visitation in 2013 was affected by the government sequestration and federal government shutdown.

SEASONALITY OF VISITATION

The following exhibit presents data on average monthly Parkway visitation reported from 2007 to 2016. While the Parkway is open year-round, visitation is seasonal.

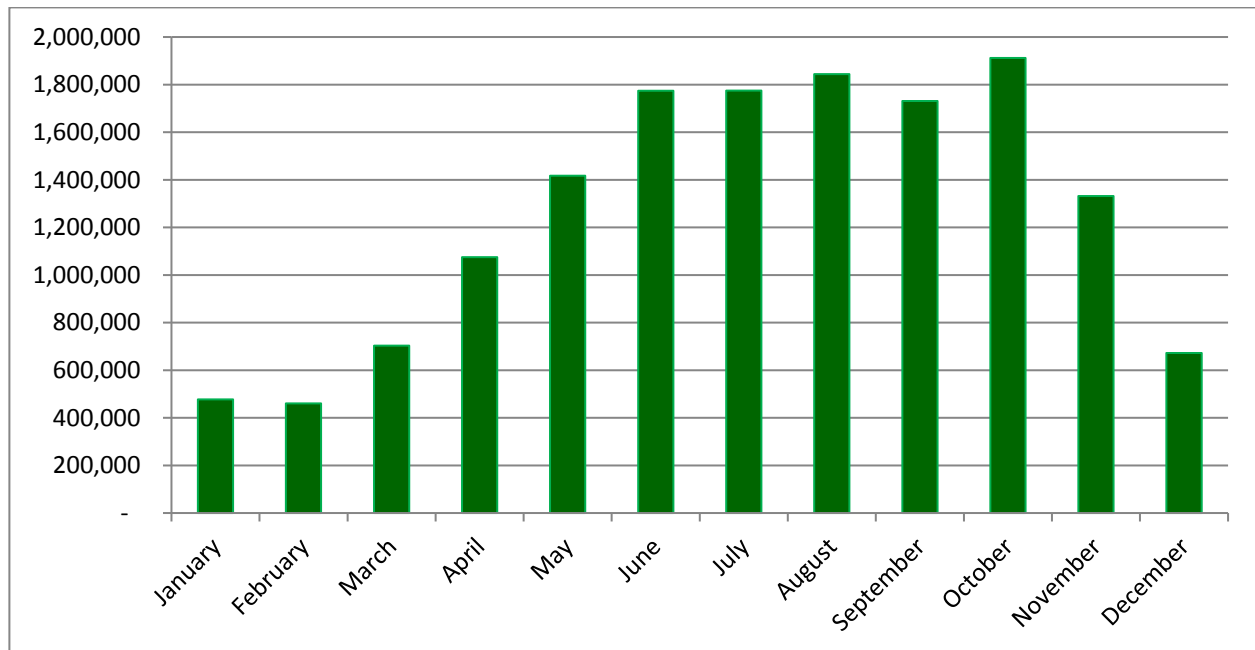
BLUE RIDGE PARKWAY AVERAGE MONTHLY VISITATION, 2007-2016

Month	Average Visitation	Share of Annual
January	477,640	3%
February	460,776	3%
March	703,221	5%
April	1,075,122	7%
May	1,417,580	9%
June	1,774,297	12%
July	1,775,177	12%
August	1,844,277	12%
September	1,731,143	11%
October	1,911,951	13%
November	1,331,855	9%
December	672,145	4%
Annual	15,175,183	100%

Source: National Park Service

The following exhibit depicts this information graphically.

BLUE RIDGE PARKWAY AVERAGE MONTHLY VISITATION, 2007-2016



Source: National Park Service

PARK VISITOR DEMOGRAPHICS

The most recent Service Visitor Study for Blue Ridge Parkway was conducted in the fall of 2007 and summer of 2008. The survey found that 50% of fall visitors were between 46 and 65 years old, 22% were between 16 and 45, 21% were 66 years or older, and 7% were 15 years or younger. The numbers were similar for the summer: 50% were between 46 and 65, 21% were between 16 and 45, 17% were 66 or older, and 12% were 15 years or younger.

The survey also found that a large proportion of visitors have visited the Parkway multiple times. In the fall, 51% of visitors had visited the Parkway four or more times, 6% had visited the Parkway three times, 10% had visited twice and 34% were making their first visit to the Parkway. The summer numbers are similar: 47% had visited four or more times, 6% three times, 10% twice and 38% were making their first visit.

According to the study, demand for services on the Parkway is derived primarily from visitors from North Carolina, Virginia and other parts of the southeastern U.S. The following exhibit presents this breakdown.

BLUE RIDGE PARKWAY VISITATION BY REGION OF ORIGIN

Origin	Share of Visitation (Fall 07)	Share of Visitation (Summer 08)
North Carolina	31%	27%
Virginia	15%	14%
Florida	9%	12%
South Carolina	7%	5%
Tennessee	6%	3%
Georgia	5%	5%
Other U.S.	23%	31%
International	4%	3%

Source: National Park Service