

# Request for Expressions of Interest (RFEI)

A Concession Business Opportunity to Operate Lodging, Camping, Tour Boat, Food and Beverage, Retail, and Other Services within Flamingo

Everglades National Park



National Park Service  
U.S. Department of the Interior  
Southeast Region



**This page intentionally left blank**

## TABLE OF CONTENTS

|   |                                     |
|---|-------------------------------------|
| <b>INTRODUCTION.....</b>  | <b>1</b>                            |
| <b>THE NATIONAL PARK SERVICE AND ITS MISSION.....</b>             | <b>1</b>                            |
| <b>EVERGLADES NATIONAL PARK.....</b>                              | <b>2</b>                            |
| <b>CONCESSION OPPORTUNITY.....</b>                                | <b>4</b>                            |
| Concession Overview.....  | 4                                   |
| Required and Authorized Services.....                             | 6                                   |
| Employee Housing.....   | 6                                   |
| <b>UTILIZATION AND OPERATING DATA.....</b>                        | <b>7</b>                            |
| Historical Revenues.....  | 8                                   |
| Camping Revenue.....  | 9                                   |
| Future Revenue and Utilization Projections.....                   | 11                                  |
| Expenses.....   | 12                                  |
| Utilities.....  | 13                                  |
| Concession Facilities.....  | 13                                  |
| <b>INVESTMENT AND OPERATIONS ANALYSIS.....</b>                    | <b>13</b>                           |
| Concession Facilities Improvement Program (New Construction)..... | 13                                  |
| Leasehold Surrender Interest (LSI).....                           | 16                                  |
| Personal Property and Inventory.....                              | 16                                  |
| Deferred Maintenance.....   | 17                                  |
| Start-Up Costs and Working Capital.....                           | 16                                  |
| Repair and Maintenance Reserve.....                               | 16                                  |
| Franchise Fees.....   | 17                                  |
| Contract Term.....  | 17                                  |
| <b>PARK VISITATION INFORMATION.....</b>                           | <b>17</b>                           |
| Seasonality of Visitation.....                                    | 17                                  |
| Visitor Demographics.....   | 17                                  |
| Overnight Stays.....  | 18                                  |
| Visitor Origins.....  | 18                                  |
| <b>MARKET OVERVIEW.....</b>                                       | <b>19</b>                           |
| South Florida Tourism.....  | 19                                  |
| Local Market Area—Lodging Competition.....                        | 20                                  |
| <b>PREFERRED OFFFEROR DETERMINATION.....</b>                      | <b>ERROR! BOOKMARK NOT DEFINED.</b> |
| <b>SITE VISIT.....</b>  | <b>ERROR! BOOKMARK NOT DEFINED.</b> |

## INTRODUCTION

THIS IS A REQUEST FOR EXPRESSIONS OF INTEREST (RFEI) ONLY. This RFEI is issued solely for information and planning purposes and does not constitute a Request for Proposal (RFP) or a promise to issue a Prospectus in the future. This request for expressions of interest does not commit the Government to contract for any supply or service whatsoever. Further, the National Park Service (Service) at this time is not seeking proposals and will not accept unsolicited proposals.

The Service is soliciting comments to a proposal to provide lodging, food and beverage, retail, and boat rental services within the Flamingo District of Everglades National Park. The Service asks that you provide your comments no later than the date written at the bottom of this document. The Service prefers comments in writing.

Responders are advised that the U.S. Government will not pay for any information or administrative costs incurred in response to this RFEI. All costs associated with responding to this RFEI will be solely at the interested party's expense. Not responding to this RFEI does not preclude participation in any future Prospectus, if any is issued. If a solicitation is released, it will be synopsisized on the Federal Business Opportunities website ([www.fbo.gov](http://www.fbo.gov)). It is the responsibility of the potential offerors to monitor this site for additional information pertaining to this requirement.

The term "Concessioner" as used in this RFEI refers to the entity that would be the Concessioner under a Concession Contract, if the National Park Service were to issue a Prospectus and select Concessioner. The term "Existing Concessioner" refers to Everglades National Park Boat Tours, Inc., the concessioner under the current Concession Contract, CC-EVER002-08 ("Existing Contract").

In the event of any inconsistency between the terms of this RFEI and 36 C.F.R. Part 51, 36 C.F.R. Part 51 will control.

## THE NATIONAL PARK SERVICE AND ITS MISSION

The Service has as its overall mission the preservation and public enjoyment of significant aspects of the nation's natural and cultural heritage. To learn more about the National Park Service, visit [www.nps.gov](http://www.nps.gov). This site includes information about the Service's mission, policies, and information on individual park units.



## EVERGLADES NATIONAL PARK

Established in 1947, Everglades National Park's original boundaries contained 460,000 acres. The Park now includes over 1.5 million acres, including most of Florida Bay, and stretches more than sixty miles north-to-south and forty miles east-to-west. It holds the largest expanse of wilderness east of the Rocky Mountains.



Popular visitor activities include canoeing, camping, boating, wildlife observation and fishing. There are 156 miles of trails in the Park, including five miles of surfaced trails, one mile of elevated boardwalk trails, and several canoe trails. There are also five visitor centers (including one at Flamingo), a research facility, and two environmental education camps in the Park.



Flamingo is one of the districts within Everglades National Park. It is the heart of the park, where the sawgrass hammock ecosystem meets the mangroves and the saltwater of Florida Bay. It is also the largest developed area within Everglades National Park (Park), located at the southernmost mainland point at the end of a 38-mile paved road that extends southwest from the main visitor center near Homestead, Florida.

Currently, visitors can stay in the park overnight in the campgrounds, eat freshly prepared meals in the screened in dining area of the Buttonwood Café, canoe the nearby canoe trails, or take a boat tour up the Buttonwood Canal or onto Florida Bay. At any point visitors have the opportunity to see alligators, manatee, crocodiles and an amazing array of birds. Visitors can rent skiffs or kayaks and fish in Florida or Whitewater Bay for various game fish. They can hike the Coastal Prairie Trail and watch shorebirds make their living. Or, for the adventurous, a multi-day trip backcountry trip by boat on the Wilderness Waterway can span 99 miles starting from the nearby Whitewater Bay, crossing the mangrove trails, and ending in Everglades City on the Gulf Coast. The term "Flamingo" will be used throughout the RFEI to describe the location of this concession opportunity. View the Flamingo video at <http://www.nps.gov/media/video/view.htm?id=F7C8282E-1DD8-B71C-0761D6C160DD0039>

The Long Pine Key campground is located in the Pinelands district of Everglades near the entrance to the park. A short distance away are the surfaced Anhinga and Gumbo Limbo Trails.

Everglades alone among our hemisphere's national parks has been named an International Biosphere Reserve, World Heritage Site and a Wetland of International Importance. These designations bring increased economic benefits from international tourism.

The elevation of the Park ranges from 0 to 8 feet, with an average elevation of 6 feet. Annual rainfall averages 60 inches per year and is concentrated in the May through September rainy season. The average high temperature in winter is 77 degrees Fahrenheit, and the average high temperature in summer is 87 degrees.



The Everglades are an integral part of the South Florida Ecosystem, an 11,000 square mile region extending from the Kissimmee River near Orlando to the Florida Keys. Originally a vast expanse of wetland, pineland, wilderness, mangroves, coastal islands and coral reefs, this is one of the continent's most highly populated and manipulated regions. The four national park units of South Florida protect about 2.5 million acres that embody some of the best and most complete examples of the natural and cultural history of South Florida.



Additional information about the Park can be found on the National Park Service website at <http://www.nps.gov/ever>.

The following is an overview map of Everglades National Park and the surrounding area.

**Exhibit 1. Map of Everglades National Park and Surrounding Area**



Source: PlanetWare



## CONCESSION OPPORTUNITY

The Existing Concessioner provides certain visitor services, detailed below, at Flamingo under the Existing Contract.

### *Concession Overview*

Construction of facilities used to serve visitors at Flamingo began in 1956, and by 1960 the visitor center, lodge, marina, campgrounds, employee housing, and other support facilities were completed. From then until the lodging facilities were largely destroyed by hurricanes Katrina and Wilma in 2005, Flamingo provided services and facilities to a growing visitor population, providing both day use and overnight accommodations

Currently, Flamingo has limited visitor services. The Existing Concessioner provides retail sales (gifts, camping supplies, and groceries) at the Marina Store, seasonal food & beverage service at the Buttonwood Café, boat tours of Florida Bay and Whitewater Bay, rental of boat slips, canoes, kayaks, skiffs and houseboats, and gasoline sales (marine and automobile).

The Flamingo and Long Pine Key campgrounds survived the 2005 hurricanes and are currently operated by the Park.

---

### Exhibit 2. Required Services in a Proposed Draft Contract

| Required Services  |
|--|
| <b>Lodging:</b> 24 Elevated Cottages; 20 Eco-Tents; 5 RVs in the Flamingo Campground |
| <b>Camping Services:</b> Flamingo and Long Pine Key campgrounds                      |
| <b>Boat Tours:</b> Tours of Florida Bay and Whitewater Bay                           |
| <b>Food &amp; Beverage:</b> Newly Constructed Restaurant                             |
| <b>Retail:</b> Marina Store  |
| <b>Fuel Sales:</b> Dockside and Auto   |
| <b>Rentals:</b> Boat Slips, Bicycles, Canoes, Kayaks, Skiffs, and Houseboats         |
| <b>Boat Transfer Service, Portage</b>  |

*Source: National Park Service*

---

The Service solicits interest on constructing additional elevated cottage units (up to a maximum of 40) and installing additional eco-tents<sup>1</sup> up to a maximum of 40).

The following is an overview map of the Flamingo area showing proposed location of cottages and eco-tents.

---

<sup>1</sup> Sturdy tents on platforms with amenities including beds, chairs, a dresser, and an electric light and fan.



**Exhibit 3. Map of Flamingo Area**



Source: National Park Service



## Required and Authorized Services

### *Lodging*

There are currently no lodging accommodations provided in the Park. Under the Draft Contract, the Service proposes the Concessioner construct and operate cottages and eco-tents as described in detail on page 14.

### *Camping*

The Service proposes the Concessioner will operate the Flamingo and Long Pine Key campgrounds, which the Service currently operates. The Flamingo Campground will offer 66 RV sites (41 of which offer electrical hookups), 55 drive-in tent sites, 60 walk-in tent sites, and 3 walk-in group sites, for a total of 184 campsites. Amenities at Flamingo Campground include shower facilities, dump stations, picnic tables/grills, and an amphitheater.

The Long Pine Key Campground has 108 drive-in sites for tents and RVs, including one group site. Restrooms, water, a sewer dump station and amphitheater are available at this site. This campground has no showers or electrical hookups.

The Service proposes the Concessioner will offer tent rental packages and site setup service at Long Pine Key and Flamingo campgrounds.

### *Boat Tours*

Boat tours under the Draft Contract would consist of (i) the Whitewater Bay Tour, which visits the interior waterways of the Everglades and features the mangrove forest and sightings of alligators, crocodiles, and birds; and (ii) the Florida Bay Tour, which explores the shallow, open water of Florida Bay and often features dolphin and wading bird sightings. The current concessioner uses three 40'-45' Corinthian catamaran passenger barges with capacities of approximately 50 passengers each.

The current concessioner offers the Whitewater Bay Tour year-round and the Florida Bay Tour during winter months and on Fridays and weekends mid-April through mid-December. Both tours run approximately 1.75 hours each.

### *Food and Beverage*

Until 2005, the food and beverage department at Flamingo consisted of two operations: the Flamingo restaurant and the Buttonwood Café. Both facilities were heavily damaged in 2005 and no longer operate.

The current concessioner operates a food and beverage outlet called the Buttonwood Café using a canteen trailer for food preparation and the screened-in ground floor patio of the restaurant building as a seating area. Current seating capacity within the screened area is approximately 60 guests. An adjacent outdoor picnic area provides additional seating. At present, the Buttonwood Café operates mid-December through mid-April.

The Service proposes the new concessioner will construct and operate a new elevated restaurant building near the new lodging cottages (see attached map). The restaurant could be up to 4,000 square feet in size for providing food and beverage service in lieu of using the Buttonwood Café for providing food service. Prior to constructing and opening the new restaurant building for business, the Concessioner will provide the food and beverage service in the Buttonwood Café space from a mobile food preparation vehicle, similar in kind and scope to the current service. Once the new restaurant opens for business, the Concessioner would no longer operate the Buttonwood Café. In addition to food and beverage services, the new restaurant facility will contain space for lodging and campground check-in and retail.

As part of the updated food and beverage concept under the proposed contract, the Concessioner may provide food and beverage delivery room service to the lodging cottages, eco-tents, and campground sites.



*Retail*

The Concessioner will sell gifts, souvenirs, camping supplies, and groceries at the Marina Store. Other operations in the marina Store include boat tour ticket sales and rentals mid-April through mid-December.

Upon completion of the new restaurant, the Concessioner may offer retail merchandise in that facility as well

*Fuel Sales*

The Concessioner will sell gasoline and diesel for automobiles and marine vessels within the Marina Store Area.

*Marina*

The Concessioner will rent boat slips in the Florida Bay marina, and bicycles, canoes, kayaks, and skiffs at the ticket booth located within the Marina Store Area. In addition, the Concessioner will provide and rent at least 2 houseboats that sleep a minimum of 6 guests each.

*Boat Transfer Service*

The Concessioner will provide boat transfer service between Florida Bay and Whitewater Bay via a trailer service. The Service will provide a universal boat trailer to the Concessioner for this purpose.

Authorized Services

The Concessioner, at its option and with the prior approval of the Service, may provide the authorized services listed in the following exhibit.

| <b>Exhibit 4. Authorized Services</b> |  |
|---------------------------------------|--|
| <b>Authorized Services</b>            |  |
| <b>Lodging:</b>                       | Additional 16 Elevated Cottages (for a total of 40); additional 20 Eco-Tents (for a total of 40) |
| <b>Guided Trips:</b>                  | Fishing, Canoe Trips, Sailing Trips  |
| <b>Visitor Shuttle:</b>               | To Canoe Launch Sites  |
| <b>Mobile Food Service:</b>           | Long Pine Key campground   |
| <b>Special Events</b>                 |  |
| <b>Chase/Tow Boat Service</b>         |  |

Subject to prior approval by the Service, the Concessioner may construct and operate 16 Elevated Cottages and an additional 20 Eco-Tents in addition to those required for a total of 40 Elevated Cottages and 40 Eco-Tents, respectively.

The Service may require a higher franchise fee if the Concessioner builds the additional lodging.

Employee Housing

The Service will assign the Concessioner two dormitory buildings for employee housing with a total capacity of approximately 24 employees. The Service also will assign the Concessioner trailer pads with hookups for employee housing. Finally, the Concessioner may provide RVs for additional employee housing. The Service will assign four existing travel trailers for managerial housing. Finally, the Service will assign a National Park Service apartment the Concessioner for use by the concession site manager.

## UTILIZATION AND OPERATING DATA

The Prospectus) will require Offerors to develop financial projections based on the business to be operated. To assist Offerors in the development of these projections, the Service will provide information regarding historical utilization, operating data, and financial projections.

**Please note the Service's financial and operating projections are estimates based on Service assumptions developed taking into account publicly available historical data, industry standards, other comparable information from other facilities, and the Existing Concessioner's Annual Financial Reports. For the purpose of the RFEI, the Service provides some historical information.**

**The Service does not warrant, and assumes no liability for, the accuracy of the financial projections or estimates contained in this Prospectus.**

### Historical Revenues

The following exhibit shows historical revenue from the operations under the current concession contract (no lodging or campgrounds).

| <b>Exhibit 5. Historical Revenue</b> |             |             |             |
|--------------------------------------|-------------|-------------|-------------|
|                                      | <b>2010</b> | <b>2011</b> | <b>2012</b> |
| Total Revenue                        | \$1,609,271 | \$1,626,411 | \$1,726,947 |

*National Park Service*

The following exhibit presents a breakdown of revenue by department during the year 2013<sup>2</sup>.

| <b>Exhibit 6. Departmental Revenue, 2013</b> |                |              |
|--|----------------|--------------|
| <b>Department</b>                            | <b>Revenue</b> | <b>Share</b> |
| Food and Beverage                            | \$470,623      | 26.1%        |
| Souvenirs & General Merchandise              | \$96,952       | 5.4%         |
| Marina                                       | \$105,630      | 5.9%         |
| Guided Tours & Rentals                       | \$1,131,220    | 62.7%        |
| Total  | \$1,804,425    | 100%         |

*Source: National Park Service*

The next exhibit presents average gross annual revenue by department during 2000-2004, prior to the hurricanes in 2005. That operation included 127 lodging rooms prior to October 2002 and 98 rooms from October 2002 through September 2005. This exhibit shows how the scale of concession services has been reduced since the hurricanes in 2005 and to demonstrate lodging should provide greater revenue potential.

<sup>2</sup> Prior to 2011, the restaurant had been closed for several years, and no food and beverage revenue had been reported.



**Exhibit 7. Average Gross Revenue by Department, 2000-2004**

| Department      | Average Revenue (2000-2004) |
|-----------------|-----------------------------|
| Lodging         | \$1,573,000                 |
| Food & Beverage | \$905,000                   |
| Retail          | \$1,147,000                 |
| Boat Tours      | \$495,000                   |
| Fuel            | \$207,000                   |
| Marina/Rentals  | \$460,000                   |
| Other           | \$265,000                   |
| <b>TOTAL</b>    | <b>\$5,052,000</b>          |

Source: National Park Service

The following exhibit presents the average number of occupied rooms per night and per month at the Flamingo Lodge between 2001 and 2003. The lodge operated near capacity during the months of February and March and experienced high levels of occupancy in December, January, and April.

**Exhibit 8. Average Number of Occupied Rooms at the Flamingo Lodge, 2001-2003**

| Month     | Occupied Rooms per Night | Occupied Rooms per Month |
|-----------|--------------------------|--------------------------|
| January   | 81                       | 2,523                    |
| February  | 92                       | 2,587                    |
| March     | 105                      | 3,240                    |
| April     | 79                       | 2,376                    |
| May       | 32                       | 989                      |
| June      | 22                       | 660                      |
| July      | 18                       | 546                      |
| August    | 20                       | 614                      |
| September | 21                       | 627                      |
| October   | 22                       | 682                      |
| November  | 47                       | 1,419                    |
| December  | 85                       | 2,626                    |

Source: National Park Service

**Camping Revenue**

The Service currently operates the Flamingo and Long Pine Key campgrounds. These campgrounds provide services year-round, although the Service does not charge fees from June through November due to low demand and the relatively uncomfortable camping conditions (largely related to the weather and mosquitoes). Current Service camping rates for tent and RV sites at both campgrounds are \$16.00 per person per night. Rates for the 41 sites with electrical hookups are \$30.00 per site. Group sites are \$30.00 per night. Rates have remained relatively stable over the last few years, increasing by no more than \$2.00 over the last five years (representing a 2.7% average annual rate increase for per person camping and a 1.4% increase for group camping).

The next two exhibits present campground utilization from 2009 to 2013 for Flamingo and Long Pine Key Campgrounds, respectively, as represented by the total number of overnight stays.



**Exhibit 9. Overnight Stays at the Flamingo Campground, 2009-2013**

|      | Tent   | RV     | Group | Total         | % Change |
|------|--------|--------|-------|---------------|----------|
| 2009 | 13,196 | 10,932 | 1,680 | <b>25,808</b> | 20.5%    |
| 2010 | 11,514 | 11,426 | 2,448 | <b>25,388</b> | -1.6%    |
| 2011 | 11,256 | 13,062 | 2,854 | <b>27,172</b> | 7.0%     |
| 2012 | 14,324 | 18,226 | 5152  | <b>37,702</b> | 38.8%    |
| 2013 | 16,363 | 16,720 | 3,024 | <b>36,107</b> | -4.2%    |

Source: National Park Service

**Exhibit 10. Overnight Stays at the Long Pine Key Campground, 2009-2013**

|      | Tent  | RV     | Group | Total         | % Change |
|------|-------|--------|-------|---------------|----------|
| 2009 | 5,416 | 10,188 | 564   | <b>16,168</b> | 18.1%    |
| 2010 | 5,998 | 10,788 | 624   | <b>17,410</b> | 7.7%     |
| 2011 | 5,304 | 8,324  | 381   | <b>14,009</b> | -19.5%   |
| 2012 | 6,380 | 7,940  | 923   | <b>15,243</b> | 8.8%     |
| 2013 | 5,172 | 7,466  | 604   | <b>13,242</b> | -13.1%   |

Source: National Park Service

While camping is available year-round, demand is very seasonal, with Flamingo and Long Pine Key following similar monthly utilization patterns. The next exhibit shows the number of sites occupied by month at the Flamingo Campground in 2013.

**Exhibit 11. Sites Occupied by Month, Flamingo Campground, 2013**

| Month        | Tent         | RV           | Group      | Total         | Share         |
|--------------|--------------|--------------|------------|---------------|---------------|
| Jan.         | 1,415        | 1,948        | 68         | 3,431         | 25.2%         |
| Feb.         | 1,544        | 2,036        | 44         | 3,624         | 26.7%         |
| March        | 1,618        | 1,380        | 82         | 3,080         | 22.7%         |
| April        | 85           | 213          | 0          | 298           | 2.2%          |
| May          | 156          | 62           | 0          | 218           | 1.6%          |
| June         | 80           | 17           | 0          | 97            | 0.7%          |
| July         | 71           | 26           | 0          | 97            | 0.7%          |
| Aug.         | 21           | 18           | 0          | 39            | 0.3%          |
| Sept.        | 25           | 7            | 0          | 32            | 0.2%          |
| Oct.         | 54           | 16           | 0          | 70            | 0.5%          |
| Nov.         | 344          | 339          | 3          | 686           | 5.0%          |
| Dec.         | 1,131        | 774          | 19         | 1,924         | 14.2%         |
| <b>TOTAL</b> | <b>6,544</b> | <b>6,836</b> | <b>216</b> | <b>13,596</b> | <b>100.0%</b> |

Source: National Park Service

The next exhibit presents total combined campground revenue at Flamingo and Long Pine Key Campgrounds over the past four years.



**Exhibit 12. Flamingo and Long Pine Key Campground Revenue**

| Year | Revenue   |
|------|-----------|
| 2009 | \$248,815 |
| 2010 | \$272,546 |
| 2011 | \$278,833 |
| 2012 | \$290,651 |

Source: National Park Service

**Future Revenue Estimates and Utilization Projections**

Projected approved (maximum) rates for 2016 by lodging type and by season are presented in Appendix C to this Prospectus. The Service estimates prices for concession services will increase at the rate of inflation, assumed to be approximately 2.4% per year. For the following estimates, the Service assumes the concessioner will have all lodging and food and beverage services operational in 2016. Again, the Service does not warrant these estimates and is not bound by these estimated amounts. All interested parties must conduct their own due diligence and calculate their own revenue estimates of required initial investment.

**Exhibit 13. Projected Capacities and Operating Statistics (2016)**

| Lodging   | Projected Ranges |
|---|------------------|
| Occupied Cottages                               | 7,300-7,800      |
| Average Daily Rate for Cottages (ADR)           | \$140-\$160      |
| Occupied Eco-Tents                              | 2,300-2,800      |
| Average Daily Rate for Eco-Tents (ADR)          | \$80-\$90        |
| Boat Tours                                      | Projected Ranges |
| Number of Passengers                            | 34,000-38,000    |
| Average Revenue Per Passenger                   | \$23-\$26        |
| Food and Beverage                               | Projected Ranges |
| Number of Restaurant Covers                     | 16,000-21,000    |
| Average Check Per Cover                         | \$15-\$20        |
| Retail  | Projected Ranges |
| Gift & Souvenir Square Footage                  | 600              |
| Revenue Per Square Foot                         | \$420-\$460      |
| General Merchandise (Grocery) Square Footage    | 1,000            |
| Revenue Per Square Foot                         | \$380-\$420      |
| Camping   | Projected Ranges |
| Occupied RV Spaces—Flamingo and Long Pine Key   | 7,000-8,000      |
| Average Daily Rate for RV Sites (ADR)           | \$22-\$25        |
| Occupied Tent Spaces—Flamingo and Long Pine Key | 7,000-8,000      |
| Average Daily Rate for Tent Sites (ADR)         | \$17-\$20        |
| Occupied Concession RV Units                    | 800-1,200        |
| Average Daily Rate for RV Units (ADR)           | \$70-\$80        |

Source: National Park Service

The next exhibit presents departmental revenue projections (2016).



**Exhibit 14. Projected Revenue by Department, 2016**

| <b>Department</b>                | <b>Projected Range</b>         |
|----------------------------------|--------------------------------|
| Lodging                          | \$1,250,000-\$1,450,000        |
| Boat Tours                       | \$800,000-\$1,000,000          |
| Food and Beverage                | \$250,000-\$450,000            |
| Retail (Souvenirs and Groceries) | \$550,000-\$750,000            |
| Camping                          | \$300,000-\$500,000            |
| Rentals                          | \$250,000-\$450,000            |
| Fuel                             | \$250,000-\$450,000            |
| Boat Transfer Service, Portage   | \$0-\$200,000                  |
| <b>Total Revenue</b>             | <b>\$3,650,000-\$5,250,000</b> |

Source: National Park Service

**Expenses**

The Service projects that most departmental and indirect expenses will be within industry average ranges.

**Utilities**

The Service provides water and sewage treatment services under the proposed contract. The Service's methodology for determining utility rates has changed with the implementation of *NPS Director's Order 35B, Cost Recovery for NPS-Provided Utilities*. DO 35B allows the Service to recover costs from users (including concessioners) for utility-related cyclic repairs, cyclic rehabilitation, and capital improvements to the utility system.

**Concession Facilities**

The concessioner will be responsible for maintenance, repairs, housekeeping, and grounds-keeping of the assigned facilities including the structures, parking lots, and roads.



### INVESTMENT AND OPERATIONS ANALYSIS

The next exhibit shows the Service's estimate of the concessioner's required initial investment at the commencement of the contract in 2015 dollars. This includes new construction, personal property, inventory deferred maintenance, and start-up costs and working capital (staff hiring, training, etc.). Again, the Service does not warrant and is not bound by these estimated amounts. All interested parties must conduct their own due diligence and calculate their own estimates of required initial investment.

#### Exhibit 15. Estimated Initial Investment

| Item   | Estimated Amount (2015 Dollars) |
|--|---------------------------------|
| Concession Facilities Improvement Program (New Construction) | \$5,550,000                     |
| Leasehold Surrender Interest                                 | \$0                             |
| Purchase of Personal Property                                | \$1,350,000                     |
| Inventory Investment   | \$85,000                        |
| Deferred Maintenance (2015 and 2016)                         | \$446,000                       |
| Start-up Costs and Working Capital                           | \$300,000                       |
| <b>TOTAL</b>   | <b>\$7,731,000</b>              |

Source: National Park Service

#### Concession Facilities Improvement Program (New Construction)

The concessioner must undertake and complete a Concession Facilities Improvement Program (CFIP) costing not less than \$5 million and not more than \$5.55 million. The CFIP includes construction of 24 new elevated cottages, construction of foundations for 20 eco-tents, construction of an elevated restaurant to contain retail space and a lodging and campground check-in area not to exceed 4,000 square feet, and associated utilities upgrades, and other infrastructure, landscaping, and site work. The elevated cottages will be located on the site of the previous lodge, the eco-tents will be located in the eco-tent area walk-in campground, and the restaurant will be located near the elevated cottages. The components of the CFIP are described in detail in the CFIP section of this RFEI.

#### Exhibit 16. Estimated CFIP Construction Cost\*

| Description   | Total Estimated Net Construction Cost |
|---|---------------------------------------|
| Studio Guest Cottages (4)                               | \$384,000                             |
| 1-bedroom Guest Cottages (12)                           | \$1,356,000                           |
| 2-bedroom Guest Cottages (8)                            | \$1,080,000                           |
| Cottage Area Infrastructure and Site work, ADA Ramp     | \$750,000                             |
| Eco-tent Foundations (20) (tents are personal property) | \$100,000                             |
| Eco-tent Area Infrastructure and Site work              | \$190,000                             |
| Maintenance Area Storage Unit                           | \$40,000                              |
| Restaurant with Retail and Lodging/Campground Check-in  | \$1,650,000                           |
| <b>Total Net Construction Cost</b>                      | <b>\$5,550,000</b>                    |

Source: National Park Service

\*Amounts do not include personal property.



### *Guest Cottages*

The CFIP requires the concessioner to construct 24 elevated cottages near the site of the former Flamingo Lodge (to the east side of the visitor center parking lot). Of the 24 cottages, 4 will be studio units (approximately 300 square feet), 12 will be one-bedroom units (450 square feet), and 8 will be two-bedroom units (600 square feet). Each cottage will have a deck, bathroom, kitchenette and dining area. The cottages may be grouped in clusters of two to four units to take advantage of common stairways and infrastructure.

The cottages must be designed and sited to withstand hurricane-force winds (146 mph per Miami-Dade county building code). The concessioner must place them on 10- to 12- foot pilings for protection from potentially damaging storm surges. The finished first-floor elevation for these units must be approximately 16 feet above sea level based on available FEMA map data. They may be modular and potentially able to be re-located to a new site at such time as coastal conditions warrant (sea level rise due to long-term climate change, for example).

The Service anticipates the Prospectus will seek information from interested parties about their designs for the guest cottages. The Service has researched several types of building materials and methods including steel framing, structural panels made of wood, cement board, or galvanized steel, as well as concrete modular construction. Interested parties should not limit themselves to these options, but the cottage design proposed must be hurricane-resistant and compatible with the other structures in the Flamingo area.

Cottages will be connected to water, wastewater, and electrical utilities, and the Concessioner will develop these utilities connections.

### *Eco-Tents*

As part of the CFIP, the Concessioner also must provide and install 20 eco-tents (sturdy tent cottages on platforms with amenities including beds, chairs, a dresser, and an electric light and fan) in the eco-tent area during the first year of the proposed contract. As part of this project, the concessioner will complete infrastructure and site work. The location of the eco-tent site features impressive views of Florida Bay. Guests staying in the eco-tents will be able to use existing comfort stations in that campground. Eco-tents will fill a niche between camping and cottage lodging, for guests who desire a more rustic Park experience without having to provide their own camping gear.

The Service is interested in using an eco-tent design (including platforms and structures) presented by the University of Miami. Conceptual designs are included in Appendix K of the RFEI. Interested parties, however, have some flexibility within this design concept. For example, eco-tents may feature sturdy aluminum, wood, or composite framing and a canvas or similar covering. The interior space of each eco-tent must be at least 120 square feet and the total platform area (including a deck) for each eco-tent must be at least 150 square feet.

The concessioner will dismantle and store the eco-tents during May through October (historically low visitor months) and reassemble them before November. Platforms may stay in place year-round.

Eco-tents will have electrical connections and enough power to operate lighting and a fan. The Concessioner must develop the infrastructure of these connections. Given the small projected electrical loads, small solar panels or batteries may be a feasible choice for powering the eco-tents.

### *Restaurant*

The CFIP requires the Concessioner to construct an elevated restaurant in the elevated cottage area that will include lodging and campground check-in and retail space. The Service anticipates the facility will be 4,000 square feet.



### *Maintenance Area Storage Unit*

The concessioner must construct or install a storage unit in the maintenance area to protect the eco-tents and other personal property when not in use. The Service estimates that the structure (possibly a heavy-duty, aluminum-frame tent or similar) will need to be approximately 1,500 square feet and will require an investment of around \$40,000, including the structure itself, the foundation, and installation labor. The structure must meet applicable hurricane building codes and be hurricane resistant.

The Service expects that all or nearly all of the Concessioner's capital investments associated with the CFIP will be eligible for Leasehold Surrender Interest (which is detailed below). This specifically does not include the canvas associated with the eco-tents.

### **Leasehold Surrender Interest (LSI)**

Standard NPS concession contracts provide that a concessioner will obtain LSI in capital improvements constructed in accordance with the terms of such contract. Standard contract language defines "capital improvements" as the construction of "structures" and "major rehabilitations" and the installation of "fixtures" (including non-removable equipment) as those terms are defined. Upon contract termination or expiration, the concessioner will be entitled to compensation for its LSI. The Service may also extinguish LSI during the term of a concession contract by payment of its value to the concessioner. In general, the value of LSI is equal to:

The initial construction cost of the related capital improvement adjusted by the percentage increase or decrease in the Consumer Price Index from the date of substantial completion of the construction of the related capital improvement to the date of payment of the leasehold surrender interest value, less depreciation of the related capital improvement.

There is no existing LSI.

### **Personal Property and Inventory Investment**

The Service estimates the concessioner will acquire personal property to operate the required services at a cost of approximately \$1.15 million in 2015 dollars. This estimate includes new personal property that will need to be acquired to support new visitor services and lodging facilities, as well as personal property for existing visitor services and general concession administration and support, such as furniture, fixtures, and equipment. The concessioner must maintain and replace assigned Service personal property as needed.

The Service assumes that the concessioner will operate the same or similarly designed tour boats as the current concessioner. Personal property the concessioner will need to acquire includes furnishings and equipment for the new guest cottages and eco-tents (as well as the tent structures themselves), five RVs/trailers for guest lodging, an additional five RVs/trailers for employee housing, upgrades to employee dorm furniture, campground maintenance equipment, restaurant furnishings and equipment, and other associated furnishings and equipment.

### **Deferred Maintenance**

The concessioner must complete all deferred maintenance (DM) for all real property assets assigned under the proposed Draft Contract. The Service estimates the cost of such projects at approximately \$446,000. These projects represent non-routine expenditures.

While the Service has estimated DM costs, the estimates may not be relied upon and Offerors must develop their own estimates. In addition, the Concessioner must complete the DM to the satisfaction of the Director even if the actual costs exceed the total estimate provided by the Service in this Prospectus. The Service does not warrant the estimate, but includes it to provide a reasonable expectation of the investment associated with the requirements herein. It is assumed that all DM will be addressed over the first two years of the



proposed Draft Contract term. Note: the Service is responsible for major repairs associated with repaving in the marina parking area, concessioner maintenance and housing areas, Flamingo and Long Pine Key campgrounds, and for replacing the seawall at Flamingo.

### **Start-Up Costs and Working Capital**

At the start of the proposed contract, the concessioner will need to make typical one-time investments covering a range of activities in order to ramp up concession operations.

### **Repair and Maintenance Reserve**

The proposed contract requires the concessioner to establish a Repair and Maintenance Reserve for repair and maintenance projects non-recurring within a seven-year time frame. The Service estimates the contribution to this fund at approximately zero point seven percent (0.7%) of gross receipts per year, dedicated to this reserve account.

Examples of projects that may be funded from the Repair and Maintenance Reserve (with the prior approval of the Service) include repair or replacement of foundations, building frames, window frames, sheathing, subfloors, drainage, rehabilitation of building systems such as electrical, plumbing, built-in heating and air conditioning, roof replacement and similar projects. No ownership, LSI, or other compensable interest will arise as a consequence of the expenditures of Repair and Maintenance Reserve funds.

### **Franchise Fees**

The Service estimates a minimum franchise fee of approximately one point one percent (1.1%) of the annual gross receipts for the preceding year. Offerors, however, may propose a higher minimum franchise fee.

### **Contract Term**

The Service estimates the term of the proposed concession contract at twenty (20) years, the maximum length allowed by law. This term reflects the challenges with restarting the lodging operations and rebuilding the food and beverage and retail operations. The Service estimates a beginning date of **May 1, 2016**.



## PARK VISITATION INFORMATION

The next exhibit presents historical recreation visitation trends at the Park over the period 2009 to 2013. This data provides the best available estimate of the overall trend in visitation to the Park.

**Exhibit 17. Everglades National Park Visitation, 2009-2013**

| Year | Total Visitation | % Change |
|------|------------------|----------|
| 2009 | 900,882          | 9.6%     |
| 2010 | 915,538          | 1.6%     |
| 2011 | 934,351          | 2.1%     |
| 2012 | 1,141,906        | 22.2%    |
| 2013 | 1,049,125        | -8.1%    |

Source: National Park Service

In 2011, the total number of visitor contacts at the Flamingo Visitor Center was approximately 129,000 out of the total Park visitation that year of 915,538 visitors. The Park estimates that approximately half of visitors who travel to Flamingo go to the visitor center there, so an estimated 260,000 people visited the Flamingo area in 2011.

### Seasonality of Visitation

**Exhibit 18. Everglades National Park Average Monthly Visitation, 2008-2013**

| Month         | Average Visitation | Share of Annual |
|---------------|--------------------|-----------------|
| January       | 112,508            | 11.7%           |
| February      | 119,872            | 12.5%           |
| March         | 127,502            | 13.3%           |
| April         | 91,720             | 9.6%            |
| May           | 65,595             | 6.8%            |
| June          | 52,049             | 5.4%            |
| July          | 58,128             | 6.1%            |
| August        | 55,959             | 5.8%            |
| September     | 44,588             | 4.6%            |
| October       | 56,579             | 5.9%            |
| November      | 74,313             | 7.7%            |
| December      | 101,507            | 10.6%           |
| <b>Annual</b> | <b>960,319</b>     | <b>100%</b>     |

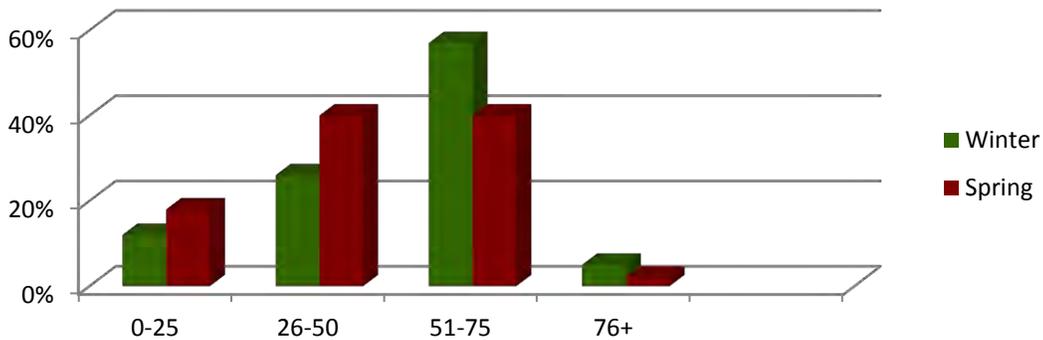
Source: National Park Service

### Visitor Demographics

A 2008 visitor survey ("Everglades National Park Visitor Study: Winter and Spring 2008") found that 57% of winter visitors were between 51 and 75 years old, 26% were between 26 and 50, 12% were 25 years or younger, and 5% were 76 years or older. The numbers were similar for Spring visitors: 40% were between 51 and 75, 40% were between 26 and 50, 18% were 25 or younger, and 2% were 76 or older.



**Exhibit 19. Age Distribution of Everglades National Park Visitors**



Source: NPS 2008 Visitor Survey

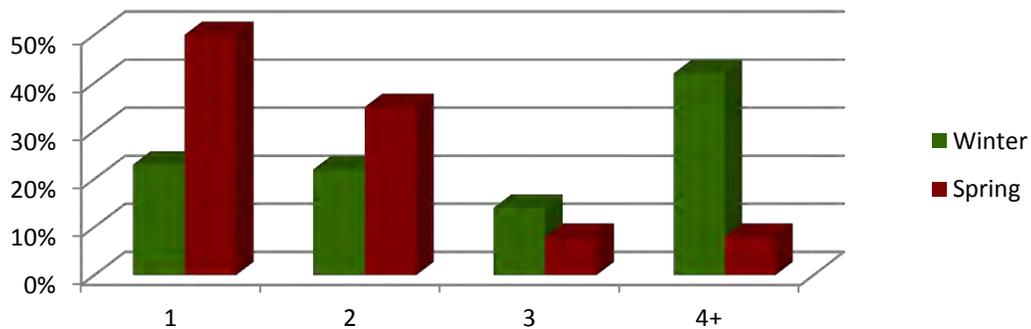
Given that around half of Everglades visitors are over age 50, a future concessioner will want to offer service levels, amenities, and products that appeal to this demographic, while also considering how to attract younger visitors, perhaps through targeted family programs or more active adventures.

**Overnight Stays**

According to both the winter and spring surveys in the 2008 visitor study, 66% of visitor groups stayed overnight away from home within Everglades National Park or the surrounding area when they visited the Park.

Of those groups, according to the winter survey, 42% stayed 4 nights or more away from home, 14% stayed 3 nights, 22% stayed 2 nights, and 23% stayed one night. In the spring, the average number of nights away from home was lower. The next exhibit summarizes these data. Since the only option for overnight stays within the Park at present is in campgrounds, visitors seeking hotel or motel lodging accommodations stay outside Park boundaries in Florida City, Homestead, Everglades City, or other cities and towns near Park entrances.

**Exhibit 20. Overnight Stays in the Everglades Area (Number of Nights)**



Source: NPS2008 Visitor Survey

The fact that many visitor groups stay multiple nights in the Everglades area indicates a demand for an in-Park lodging option. The historical concession lodging data up to 2005 also indicates high levels of demand for in-Park lodging.

**Visitor Origins**



According to the 2008 visitor survey (combined winter and spring results), U.S. visitors comprised 72% of visitation to Everglades National Park, while international visitors accounted for 28%.

**Exhibit 21. Visitation by Region of Origin**

| Region                         | Share of Visitation (Winter and Spring 2008) |
|--------------------------------|--|
| Florida                        | 25%  |
| Netherlands                    | 6%   |
| Germany                        | 6%   |
| United Kingdom                 | 4%   |
| Canada                         | 4%   |
| Michigan                       | 4%   |
| Pennsylvania                   | 4%   |
| France                         | 3%   |
| New York                       | 3%   |
| California                     | 3%   |
| Illinois                       | 2%   |
| Ohio                           | 2%   |
| Massachusetts                  | 2%   |
| All Other States and Countries | 32%  |
| <b>Total</b>                   | <b>100%</b>                                  |

Source: NPS 2008 Visitor Survey

## MARKET OVERVIEW

### South Florida Tourism

Data from VISIT FLORIDA, the non-profit corporation that carries out the work of the state's Commission on Tourism, shows that the total number of visitors to the state increased from 72.8 million in 2000 to 91.5 million in 2012, a 26% increase over the period, or an average annual rate of 1.9% per year. The number of overseas visitors increased by 73% over the same period (from 6.0 million to 10.4 million), while the number of Canadian visitors increased by 80% (from 2.0 to 3.6 million).

**Exhibit 22. Florida Historic Visitor Numbers (millions)**

|      | Domestic | Overseas | Canadian | Total |
|------|----------|----------|----------|-------|
| 2000 | 64.7     | 6.0      | 2.0      | 72.8  |
| 2001 | 62.3     | 5.3      | 1.9      | 69.5  |
| 2002 | 67.9     | 4.4      | 1.6      | 73.9  |
| 2003 | 68.7     | 4.2      | 1.7      | 74.6  |
| 2004 | 73.4     | 4.4      | 1.9      | 79.7  |
| 2005 | 77.2     | 4.4      | 2.0      | 83.6  |
| 2006 | 77.6     | 4.1      | 2.1      | 83.9  |
| 2007 | 77.3     | 4.7      | 2.5      | 84.5  |
| 2008 | 76.1     | 5.2      | 2.9      | 84.2  |
| 2009 | 71.2     | 7.0      | 2.6      | 80.9  |
| 2010 | 71.2     | 8.0      | 3.1      | 82.3  |
| 2011 | 74.7     | 9.3      | 3.3      | 87.3  |
| 2012 | 77.6     | 10.4     | 3.6      | 91.5  |

Source: VISIT FLORIDA Research

The total number of visitors declined in 2008 and 2009 after reaching 84.5 million in 2007. Part of the decline in 2009 was due to a change in counting methodology, but it also reflects reduced travel demand



due to the global economic slowdown. The increase from 80.9 million visitors in 2009 to a record 91.5 million visitors in 2012 was due primarily to increases in the number of overseas and Canadian visitors.

The following exhibit provides an aggregate indicator of the overall trend in the tourism industry in Florida.

**Exhibit 23. Total Tourism Spending in Florida (billions)**

|      | Spending | Change |
|------|----------|--------|
| 2000 | \$50.9   |        |
| 2001 | \$50.8   | -0.2%  |
| 2002 | \$51.1   | 0.6%   |
| 2003 | \$51.5   | 0.8%   |
| 2004 | \$57.1   | 10.9%  |
| 2005 | \$62.0   | 8.6%   |
| 2006 | \$65.0   | 4.8%   |
| 2007 | \$65.5   | 0.8%   |
| 2008 | \$65.2   | -0.5%  |
| 2009 | \$60.9   | -6.6%  |
| 2010 | \$62.7   | 3.0%   |
| 2011 | \$67.2   | 7.2%   |
| 2012 | \$71.8   | 6.8%   |

Source: VISIT FLORIDA Research

Total spending increased from \$50.9 million in 2000 to \$71.8 million in 2012, an increase of 41.1% over the period, or an average of 2.9% per year. As with the state visitation data, spending grew through 2007 and declined in 2008 and 2009 before increasing over the past three years.

Data on arrivals to Miami International Airport provide an indicator of travel specifically to south Florida. Domestic arrivals increased by 15.7% between 2006 and 2013, or an average of 2.1% per year. International arrivals increased much more significantly over the period, by 37.9% between 2006 and 2013, or 4.7% per year. Although domestic arrivals fell slightly between 2007 and 2009, international arrivals actually increased during that recessionary period.

**Exhibit 24. Miami International Airport Passengers (Arrivals)**

|      | Domestic   | % Change | International | % Change |
|------|------------|----------|---------------|----------|
| 2006 | 8,811,650  |          | 7,455,498     |          |
| 2007 | 9,025,732  | 2.4%     | 7,863,890     | 5.5%     |
| 2008 | 8,892,542  | -1.5%    | 8,149,108     | 3.6%     |
| 2009 | 8,961,413  | 0.8%     | 8,057,475     | -1.1%    |
| 2010 | 9,432,074  | 5.3%     | 8,552,895     | 6.1%     |
| 2011 | 9,972,896  | 5.7%     | 9,283,867     | 8.5%     |
| 2012 | 10,066,753 | 0.9%     | 9,774,878     | 5.3%     |
| 2013 | 10,196,660 | 1.3%     | 10,284,812    | 5.2%     |

Source: Miami International Airport

### Local Market Area—Lodging Competition

The following exhibit lists several properties that offer temporary, overnight lodging in the Florida City-Homestead area nearest to Flamingo. The list includes properties that report occupancy and rate data to Smith Travel Research.



**Exhibit 25. Lodging Properties in Homestead and Florida City**

| Property Name  | Location     | Number of Rooms |
|--|--------------|-----------------|
| Days Inn Homestead                                   | Homestead    | 100             |
| Hampton Inn Suites Miami South Homestead             | Homestead    | 126             |
| Travelodge Florida City                              | Florida City | 88              |
| Econo Lodge Florida City                             | Florida City | 42              |
| Super 8 Florida City Homestead Area                  | Florida City | 52              |
| Holiday Inn Express & Suites FL City Gateway To Keys | Homestead    | 105             |
| Comfort Inn Florida City                             | Florida City | 124             |
| Ramada Florida City East Palm                        | Florida City | 123             |
| Best Western Gateway To The Keys                     | Florida City | 114             |
| Knights Inn Florida City Homestead                   | Florida City | 48              |

Source: Smith Travel Research

The following exhibit presents annual average daily rate (ADR) data for the properties listed in Exhibit 26 over the 2006-2011 period.

**Exhibit 26. Florida City-Homestead Lodging Average Daily Rates, 2006-2011**

| Year | ADR     | % Change |
|------|---------|----------|
| 2006 | \$82.15 |          |
| 2007 | \$88.28 | 7.5%     |
| 2008 | \$87.36 | -1.0%    |
| 2009 | \$82.31 | -5.8%    |
| 2010 | \$83.00 | 0.8%     |
| 2011 | \$81.89 | -1.3%    |

Source: Smith Travel Research

Based on historic ADR data from the Flamingo Lodge within the Park, visitors place a premium on the in-Park location and unique experience available at Flamingo. In 2003, ADR at Flamingo Lodge was 70% higher than the ADR reported by a sample of properties outside the Park listed above.

The exhibit below presents average annual occupancy rates for the lodging properties in the Smith Travel Research sample over the 2006-2011 period.

**Exhibit 27. Florida City-Homestead Area Occupancy Rates, 2006-2011**

| Year | Occupancy Rate |
|------|----------------|
| 2006 | 63.6%          |
| 2007 | 61.8%          |
| 2008 | 56.6%          |
| 2009 | 50.8%          |
| 2010 | 57.3%          |
| 2011 | 63.3%          |

Source: Smith Travel Research

There are additional lodging properties under construction or in the pipeline in the Homestead/Florida City area outside of the Park. Construction of an estimated 100 rooms has been proposed for the central corridor of Florida City in the near future.



Demand for in-Park Flamingo lodging may be relatively immune to these changes in outside of the Park lodging capacity. Typically, visitors seeking a National Park experience first attempt to secure accommodations inside the Park, and then seek accommodations in gateway communities when in-Park facilities are not available.

A number of hotels, motels, and other types of lodging establishments in the Upper Keys offer an experience more comparable to Flamingo (on or near the coast, and geared toward the leisure traveler) than the lodging options in Homestead and Florida City. The following exhibit summarizes 2012 rates charged by some hotels in the Keys, particularly in Key Largo and Islamorada, which are closest to Flamingo. In addition to the more localized establishments in this exhibit, several chain hotels operate in the area (Hampton Inn, Courtyard by Marriott, Holiday Inn, etc.).

**Exhibit 28. Partial List of Lodging Establishments in the Upper Keys**

| Property Name               | Location   | Rates (2012) |
|-----------------------------|------------|--------------|
| Coconut Palm Inn            | Key Largo  | \$156-\$201  |
| Rock Reef Resort            | Key Largo  | \$140-\$201  |
| Marina Del Mar Resort       | Key Largo  | \$133-\$180  |
| Seafarer Resort             | Key Largo  | \$85-\$155   |
| Largo Lodge                 | Key Largo  | \$100-\$195  |
| Sunset Cove Beach Resort    | Key Largo  | \$158-\$169  |
| Atlantic Bay Resort         | Tavernier  | \$109-\$287  |
| Island Bay Resort           | Tavernier  | \$149-\$358  |
| Islander Resort             | Islamorada | \$156-\$266  |
| Chesapeake Beach Resort     | Islamorada | \$198-\$288  |
| La Siesta Resort & Marina   | Islamorada | \$167-\$268  |
| Postcard Inn Beach Resort   | Islamorada | \$162-\$272  |
| Ragged Edge Resort & Marina | Islamorada | \$104-\$169  |
| Pines and Palms Resort      | Islamorada | \$143-\$474  |
| La Jolla Resort             | Islamorada | \$79-\$299   |

*Source: Consultant*

### Boat Tours

Boat tour rates currently charged by the current concessioner at Flamingo are in line with rates for boat tours of similar content and duration in the region. The following exhibit provides summaries of some other boat tours offered in the area.

**Exhibit 29. Boat Tours in the Local Market Area**

|  | Max. Passengers | Tour Length | Adult Price | Child Price |
|--|-----------------|-------------|-------------|-------------|
| Pennekamp State Park Glass Bottom Boat | 130             | 2.5 hours   | \$24        | \$17        |
| Key Largo Princess                     | 129             | 2 hours     | \$30        | \$17        |
| Caribbean Watersports                  | 6               | 2 hours     | \$60        | \$45        |
| Key Largo Boat Tours                   | 35              | 3 hours     | \$32        | \$24        |

*Source: Consultant*

### Campgrounds

Five campgrounds operate within 15 miles of the Royal Palm entrance to the Park, all of which are located in Florida City or Homestead and comprise a significant share of the regional supply of campsites. Camping



also is available at state parks in the Keys, further from Flamingo. Summary information concerning the local campgrounds is listed in the following table.

**Exhibit 30. Summary of Local Area Campgrounds**

| Campground  | No. of Sites                           | Nightly Rates                                  | Amenities  |
|---|--|--|--|
| Boardwalk RV Resort, Homestead                    | <b>Tent:</b><br>None<br><b>RV:</b> 137 | <b>RV:</b> \$35-\$45                           | Full/partial hook ups, restroom/shower facilities, laundry, community center, swimming pool, fitness facility, picnic area |
| Southern Comfort RV Resort, Florida City          | <b>Tent:</b> 40-50<br><b>RV:</b> 350   | <b>RV:</b> \$30-\$38<br><b>Tent:</b> \$10-\$28 | Full/partial hook-ups, swimming pool, bar, laundry, picnic area  |
| Gold Coaster Mobile Home and RV Resort, Homestead | <b>RV:</b> 525<br><b>Tent:</b><br>None | <b>RV:</b> \$30-\$50                           | Full/partial hook-ups, restroom/shower facilities, laundry, swimming pool, laundry, picnic area                            |
| Florida City Camp Site and RV Park, Florida City  | <b>RV:</b> 310<br><b>Tent:</b> 50      | <b>Tent:</b> \$25<br><b>RV:</b> \$30           | Full/partial hook ups, restroom/shower facilities, laundry, picnic area  |
| Everglades Hostel, Florida City                   | <b>Tent:</b> 9                         | <b>Tent:</b> \$18                              | Laundry/shower facilities, picnic area   |

*Source: Consultant*

The majority of these locations cater predominantly to RV campers (although some also provide tent camping) and offer a far wider range of amenities and services than what is supplied at the Park campgrounds. Typically, amenities at these alternative sites include full or partial utility hook-ups, picnic tables and grills, laundry facilities, restrooms and showers, wireless internet, and cable TV. Many also provide additional amenities, such as swimming pools and fitness centers. All of these campgrounds are privately operated, except the Florida City Camp Site and RV Park, which is managed by Florida City.

These campgrounds are open year-round, with utilization rates similar to Park camping utilization trends. During the summer period, occupancy falls to 30% to 50%.

During the winter, many RV visitors using the campsites listed in Exhibit 31 are middle-aged or senior citizen couples traveling from colder climates ("snowbirds"), who are often on prolonged trips. Over 50% of these types of visitors are repeat customers who come and stay each year at their favorite campground, either as the prime destination or as one of several stops during their vacation. Almost all visit Everglades National Park during their stay, but prefer to camp outside of the Park due to the wider range of amenities offered. The period between mid-April and mid-December generally attracts more locals for both types of camping.

Demand at these local, outside of the Park campgrounds has remained relatively constant over the last five years, with only minor impacts to their business associated with the economic downturn. In fact, several noted small to moderate increases in demand (ranging from 5% to 15%) in recent years.



## SUBMISSION GUIDELINES

The NPS asks interested parties to provide recommendations regarding this proposed business opportunity. The NPS will consider these recommendations when finalizing the prospectus and the proposed contract. These recommendations are recommendations only and the quality of the recommendations will not be scored or considered in the event the Service issues a proposal. Please provide the following in your recommendation:

- Recommendations of any kind regarding this RFEI (can include drawings, charts, descriptions, etc.)
- Your name, company or organization, and contact information including email address
- Previous experience similar to the operations proposed in the RFEI, if any
- Previous NPS Concessions experience, if any
- Any other pertinent points or conditions

Please indicate in your submission whether you would like the NPS to retain your contact information and notify you if the Service issues a prospectus.

Please submit your response by **4:00 PM EDT, Thursday, September 25, 2014**. In addition, respondents are encouraged to submit an electronic copy of their response in Microsoft compatible formats. . If you would like more information, please contact William Gordon, Jr. at the following address, phone number, or e-mail:

Attn: William Gordon, Jr., Concessions Management Specialist  
Superintendent's Office, Everglades and Dry Tortugas National Parks  
40001 Highway 9336  
Homestead, FL 33034  
Phone: (305) 242-7762  
E-Mail: [william\\_gordon@nps.gov](mailto:william_gordon@nps.gov)

The NPS will acknowledge your submission after receipt. The Service intends to provide a publically available description of the next steps in the process and notify all respondents by email within 60 days following the submission deadline.

