

**Gerry E. Studds
Stellwagen Bank
National Marine Sanctuary
Visitor Interpretive Center
Provincetown**

**Prepared by:
ConsultEcon, Inc.**

**Prepared for:
NOAA
National Marine Sanctuary Program
Town of Provincetown
Center for Coastal Studies**

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EXECUTIVE SUMMARY

ConsultEcon, Inc. has evaluated opportunities in Provincetown to develop a Visitor Interpretive Center focused on the Gerry E. Studds Stellwagen Bank National Marine Sanctuary (VIC). This study has been prepared in a highly collaborative process with Provincetown, NOAA National Marine Sanctuary and the Center for Coastal Studies as well as a number of Provincetown stakeholders. In the study and the collaborative process, a preferred location for the interpretive center has been identified, a prototypical program of spaces prepared, potential space uses in the facility profiled, and a preliminary operating plan prepared. Based on this interpretive center project concept, subsequent phases of project planning can begin. This would include securing the site, preparing partnership agreements, planning and design of the facility and ultimately securing the needed funds and constructing the facility.

The proposed VIC can provide substantial benefits to all participating partners as well as to the Provincetown community and to Stellwagen Bank itself. The project will educate visitors about environmental and conservation issues related to Stellwagen Bank and the regional marine environment; it will support a number of businesses that provide access to the marine resources; and it can be a focal point of downtown Provincetown and a new reason to visit or extend a stay in the town. The proposed Visitor Interpretive Center will also provide a venue for community events and programs, particularly before and after the busy tourism high season.

Site Review

The Gerry E. Studds Stellwagen Bank National Marine Sanctuary encompasses a total of 638 square nautical miles or 842 square miles. The sanctuary is just three miles from Provincetown the proposed location for the VIC.

The preferred location for the VIC is on the land that is currently the Municipal Parking Lot (MPL), on the waterfront by MacMillan Pier. This location is preferred because it is in the centroid of commercial and transportation activity; has a strong relationship to the water; and, is visible to both MacMillan and Fisherman's Wharves, as well as the remaining parts of the parking lot and Commercial Street, the heart of the tourist district. This town-owned location is the centroid of downtown activity, and is accessible by foot, bike, boat, ferry, bus and auto. Further, it is adjacent to compatible and complimentary uses, including visitor amenities, shops, and restaurants.

The Municipal Parking Lot (MPL) and the adjacent Transportation Hub on Ryder Street Extension are within the preferred location. Within this waterfront location there are a number of alternative sites that can be considered. The opportunity to rework the waterfront area that this project could initiate is viewed by committee participants as being beneficial to the Town; but it is recognized that a master plan or implementation plan has not been

undertaken that would contribute to the selection of the optimum site. The final decision on a site within the waterfront area will depend on further planning and design.

Preliminary Visitor Information Center Program

The Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center is proposed as a 9,300 square foot facility featuring interpretive exhibits describing the diversity of wildlife and natural value preserved by the Gerry E. Studds Stellwagen Bank National Marine Sanctuary. The VIC would include a multi-purpose space, visitor amenities, such as restrooms and retail, and back of house administrative space. This is the mid-range facility size that could be larger or smaller depending on the planning process and the involvement of project partners. Additional opportunities for program expansion may come in the future, including substantial Visitor Information Center elements, depending on future planning and design phases, as well as the development of partnerships with other key stakeholders. Within the preliminary program of spaces, a situation with less partner on-site activity would indicate a VIC at a lower size range; if there is substantial participation by partners, the VIC might be larger.

Resident Market

Attendance to the VIC is likely to be made up in part by residents of Provincetown, Cape Cod, and the Greater Boston Area. For the purposes of this study, the Resident Market Area for the Visitor Interpretive Center was defined as the Cape and Greater Boston Area. The Primary Market Area was defined as the four outermost communities on Cape Cod, including Provincetown, Truro, Wellfleet, and Eastham, the Secondary Market Area was defined as the remaining communities on Cape Cod, and the Tertiary Market Area was defined as the Boston Metropolitan Statistical Area. Because of Provincetown's destination tourism profile and its location, the Boston Metropolitan Statistical Area contributes a major portion of Provincetown's annual tourists. Therefore the Boston Metro area has both resident and tourist market characteristics, and in this report its attendance potential is analyzed as a component of the overall tourism market

As defined, the Resident Market Area had a 2016 population of 4.96 million, which is projected to grow 3.9 percent to 5.16 million by 2021. This rate of growth is somewhat greater than that in the Commonwealth of Massachusetts as a whole, but slower than the growth for the United States as a whole. The primary market area is only a small portion of this population, about 14,000, which is projected to grow 5.4 percent by 2021. The population of the overall Resident Market Area has the following demographic characteristics:

- ◆ A median age of 39.8, indicating a population about the same age as the Commonwealth. The median age in the Primary and Secondary Market Areas is significantly higher than the Resident Market as a whole, at 56.3 and 51.7, respectively.
- ◆ A population of school age children estimated at 772,000, a population that is projected to decrease by 2.8 percent by 2021.

- ◆ An average household size of 1.95 in the Primary Market Area, compared to 2.24 in the Secondary, 2.51 in the Tertiary, and 2.59 in the United States as a whole.
- ◆ A median household income of \$76,100, higher than the Commonwealth as a whole, and significantly more than the Country as a whole. The median household income in the primary market area is most comparable to the Country as a whole.

Tourist Market

The Outer Cape market is characterized by a small number of local and regional residents and a large influx of tourists during the summer months. Provincetown's year round population is just under 3,000 people, which reportedly increases to 18,000 people in the summer, due to people who live there throughout the entire season. In July and August, there are reported to be anywhere from 35,000 to 60,000 people in Provincetown on a daily basis, with the actual number dependent on weekend activity and event schedule. These seasonal visitors and residents are the key market opportunity for the proposed VIC.

There are a number of activities and attractions in Provincetown and nearby towns that form the competitive context for the proposed visitor interpretive center. The most popular activity in the Outer Cape and the primary reason for visiting is going to the beach. Approximately 4.5 million recreational visitors come to the Cape Cod National Seashore (CCNS) annually and many of these visitors will be interested in complementary programming offered by the proposed VIC, especially programs offered in conjunction with CCNS. Some visitor intercept points on the Outer Cape have fairly low attendance and typically operate seasonally. Whale watching is very popular and is highly relevant to NOAA's operations and research in the area. According to NOAA there are an estimated one million passengers on whale watching trips each year in the waters off Eastern Massachusetts. Another source reported 250,000 to 300,000 people that go whale watching out of Provincetown annually and adult tickets typically cost about \$47. During peak whale watching season it is estimated that 55 whale watching ships can be found on Stellwagen Bank daily.

NOAA Marine Sanctuary Public Outreach Activities

The Office of National Marine Sanctuaries, a branch of NOAA, is the trustee for over 170,000 square miles of marine waters in the United States. The purpose of these sanctuaries is to protect areas of the marine environment with national significance for their conservation, recreational, ecological, historical, scientific, cultural, archeological, educational or esthetic qualities. Sanctuaries each have their own management plan that outlines management and operational activities, as well as educational and interpretive initiatives that may be sanctuary-specific or system-wide. Visitor Information Centers and educational facilities are part of the public outreach programming in existing NOAA National Marine Sanctuaries. These visitor information centers offer interpretive exhibits and educational programming for visitors, in partnership with other area conservation and education organizations. Admission

is typically free, but earned revenues are typically met through retail operations to supplement institutional and gift and grant revenue sources.

Attendance Potential

The proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center in Provincetown has substantial attendance potential for both the resident and tourist markets in Provincetown. An attendance potential range has been established for total stabilized attendance projected to be achieved in the third year after opening. Annual attendance potential at the VIC in a stable year (Year 3) is estimated at 206,000 to 313,000, with a mid-range “planning factor” of 260,000.

During the first few years after opening, the project would be expected to achieve somewhat higher attendance based on local excitement about the facility. A highly seasonal attendance pattern is expected, with a substantial peak during the summer months. Estimates of peak attendance days at the proposed VIC were prepared. At peak periods, the facility would have an estimated 225 to 339 visitors in-house under a mid-range attendance scenario. The preliminary proposed scale of the VIC at 9,300 square feet would accommodate visitation at this level.

Operating Potential

Based on the analysis in this report, the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center has the potential to operate successfully over time, if the assumptions regarding quality of facility development, operations, ongoing support from its institutional partners and additional fundraising are met. Annual Operating expenses for the VIC are estimated at \$593,000 annually based on an operating profile with 5.5 Full Time Equivalent Personnel (FTE). Because admission fees will not be charged to visitors to the VIC, operating revenues of the VIC will be derived from fees for presentations to tour groups and school groups, fees for community and educational events, facility rental fees, and retail at the VIC. In this operating scenario, the proposed VIC earns about 42 percent of the revenues needed to support the facility’s operating costs. A directed set of fundraising and giving programs will be needed in addition, as well as in-kind and funding support from operating partners. The operating profile of the VIC is similar to many of the comparable facilities profiled in this report, whose operating strategies have been used in preparing the operating plan. Diversified and creative sources of revenue and sound fiscal management will assist the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown to sustain its operations.

Section I

INTRODUCTION AND ASSUMPTIONS

ConsultEcon, Inc. has evaluated opportunities in Provincetown to develop a Visitor Interpretive Center focused on the Gerry E. Studds Stellwagen Bank National Marine Sanctuary (VIC). This study has been prepared in a highly collaborative process with Provincetown, NOAA National Marine Sanctuary and the Center for Coastal Studies as well as a number of Provincetown stakeholders. In the study and the collaborative process, a preferred location for the interpretive center has been identified, a prototypical program of spaces prepared, potential space uses in the facility profiled, and a preliminary operating plan prepared. Based on this interpretive center project concept, subsequent phases of project planning can begin. This would include securing the site, preparing partnership agreements, planning and design of the facility and ultimately securing the needed funds and constructing the facility.

The proposed Visitor Interpretive Center can provide substantial benefits to all participating partners as well as to the Provincetown community and to Stellwagen Bank itself. The VIC will educate visitors about environmental and conservation issues related to Stellwagen Bank and the regional marine environment; it will support a number of businesses that provide access to the marine resources; and it can be a focal point of downtown Provincetown and a new reason to visit or extend a stay in the town. The proposed Visitor Interpretive Center will also provide a venue for community events and programs, particularly before and after the busy tourism high season.

Assumptions

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

1. The size and design of the Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center will be appropriate to its market potential, and will serve to create a high-quality, stimulating attraction with broad-based audience appeal and a distinctive

- image. On and off-site signage will be highly visible and of best quality. The mutual support of other governmental, cultural and tourism infrastructure and organizations, as well as conservation based organizations in Provincetown, Cape Cod, Commonwealth of Massachusetts, and with NOAA National Marine Sanctuary Program is essential to its success.
2. The Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center will be competently and effectively managed to provide outstanding exhibitions, programs and educational experiences. A promotional campaign will be developed and implemented in concert with other area attractions to the extent possible. This program will be targeted to prime visitor markets. The facility's program fees and facility rental rates will be consistent with the experience offered, and with local market rates.
 3. There will be no physical constraints to impede visitors to the facility, such as major construction activity. Changes in economic and social conditions due to events including, but not limited to, major recessions, major environmental problems or disasters that would negatively affect operations and visitation may impact on the results of the findings in this study, including visitor projections.
 4. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible, and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. from its independent research efforts, general knowledge of the industry, and consultations with the client. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results. Outputs of computer models used in this report are rounded. These outputs may therefore slightly affect totals and summaries.
 5. Possession of this report does not carry with it the right of publication. This report will be presented to third parties in its entirety. This report may not be used for any purpose other than that for which it was prepared.
 6. This report was prepared during the period July to November 2016. It represents data available at that time.

Section II

SITE EVALUATION

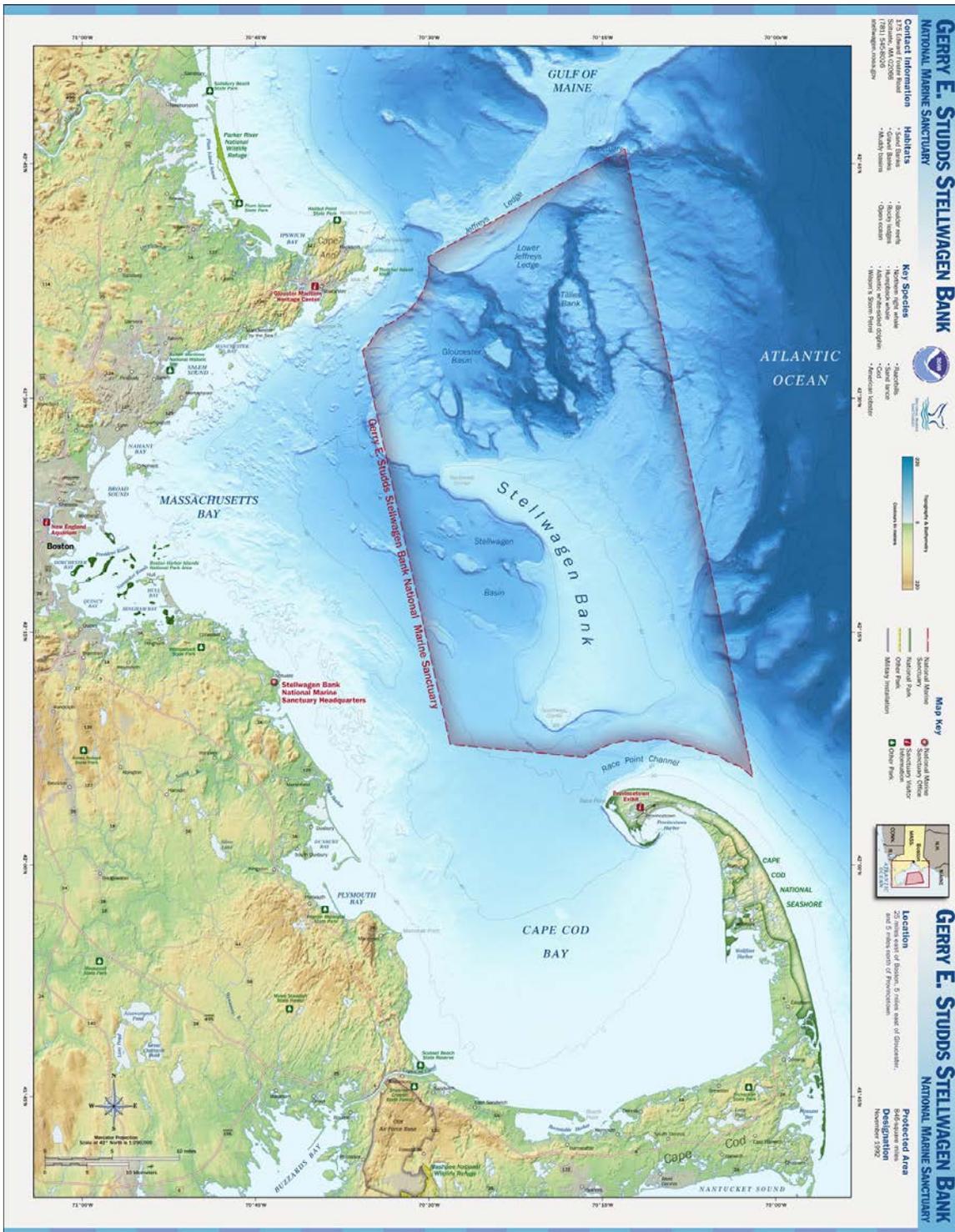
This section reviews the project concept and potential sites in Provincetown for the Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center (VIC).

Gerry E. Studds Stellwagen Bank National Marine Sanctuary

The Gerry E. Studds Stellwagen Bank National Marine Sanctuary encompasses a total of 638 square nautical miles or 842 square miles. With this area are several underwater plateaus, including Tillies Bank, parts of Jeffrey's Ledge, and, the centerpiece of the Sanctuary, Stellwagen Bank. Designated in 1992, this underwater plateau attracts a variety of marine wildlife and, subsequently, humans. The boundaries of the sanctuary lie entirely in federal waters, beyond the 3-mile limit of the jurisdiction of the Commonwealth of Massachusetts. The sanctuary is approximately 11 miles from Scituate, where the sanctuary headquarters are located, 25 miles east of Boston, and just three miles from Provincetown and Gloucester.

Figure II-1 is a map showing the boundaries of the Gerry E. Studds Stellwagen Bank National Marine Sanctuary.

Figure II-1
Map of Gerry E. Studts Stellwagen Bank National Marine Sanctuary

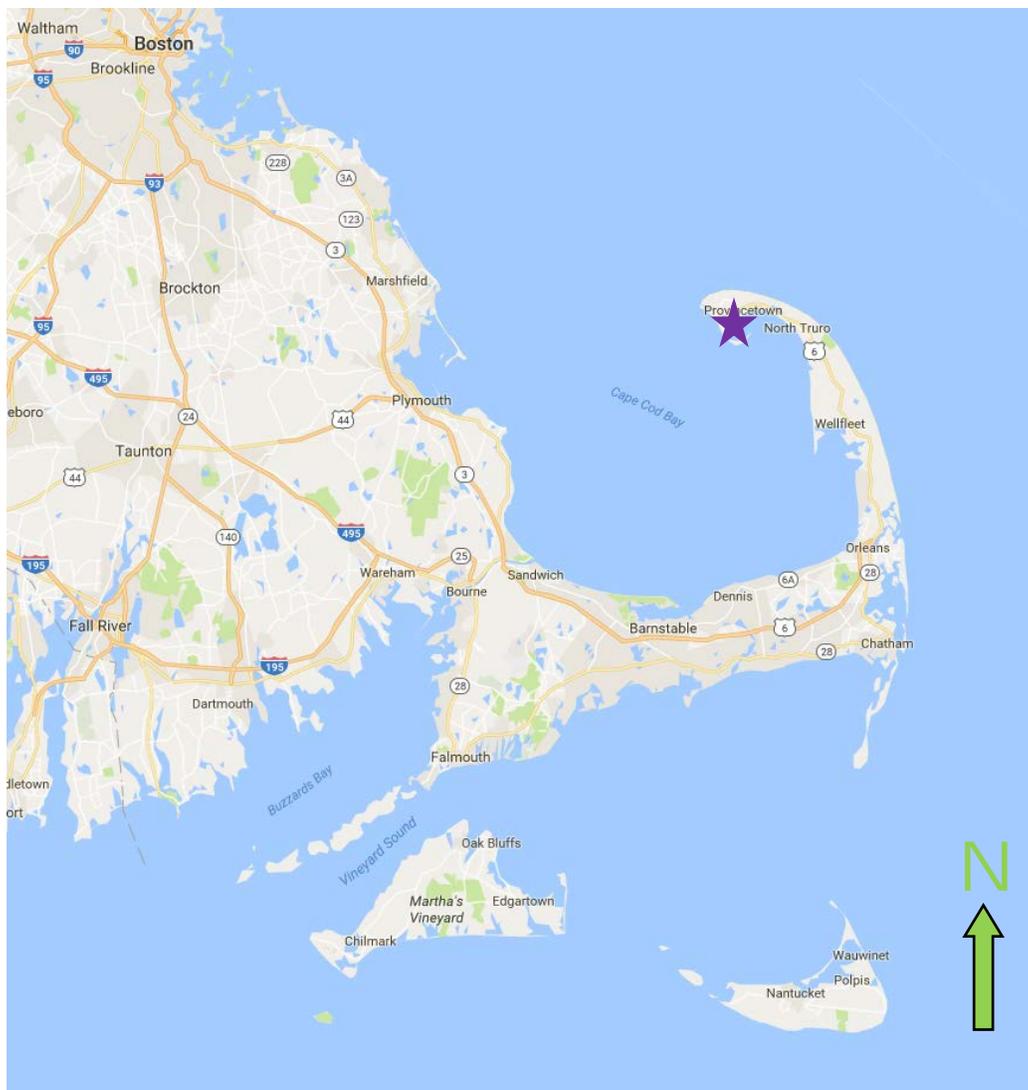


Source: NOAA

Regional Context

The proposed location for the Gerry E. Studds Stellwagen Bank National Marine Sanctuary is in Provincetown, Massachusetts at the outer end of Cape Cod. **Figure II-2** shows the location of Provincetown in a regional context. Provincetown is accessible via US Route 6, the primary roadway through Cape Cod. Provincetown has a small airport with flights to and from Boston and other locations, and a ferry terminal with connections to Boston and Plymouth, MA.

Figure II-2
Map of Provincetown Regional Context

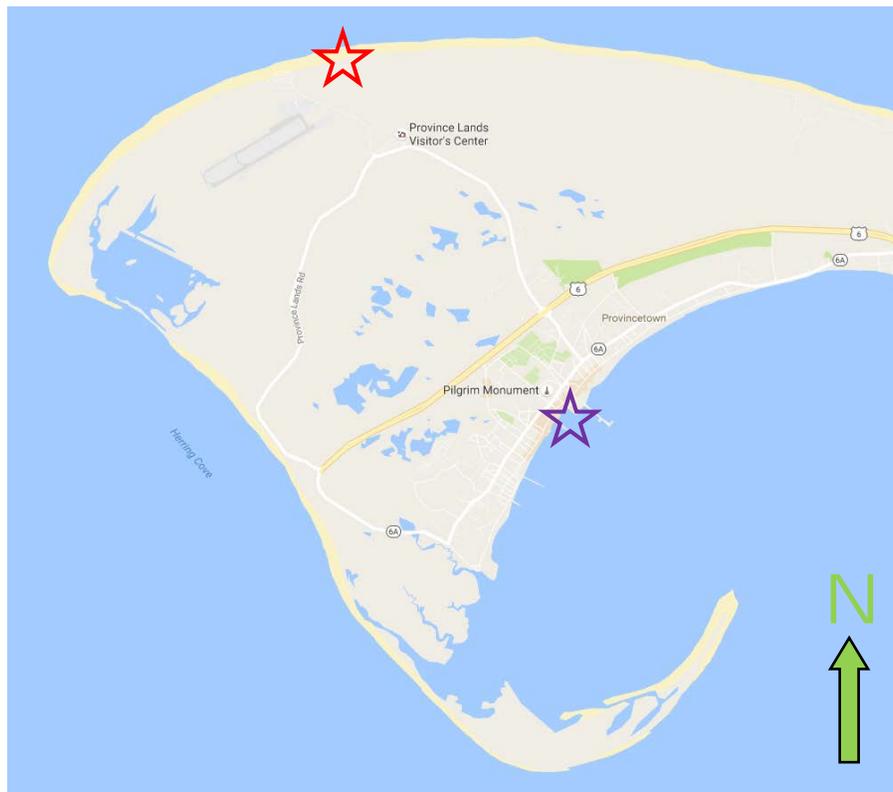


Note: Purple Star shows location of Provincetown
Source: GoogleMaps; ConsultEcon, Inc.

Local Context

Provincetown is located on the outer end of the Cape Cod peninsula. This part of Cape Cod is fairly remote, and, while the Town of Provincetown is a commercial destination for residents of the Outer Cape, the year-round population is only about 3,000. Provincetown is also a popular destination for regional and long distance vacationers. Some have their accommodations in Provincetown, others elsewhere on Cape Cod and in addition there is a substantial number of day trip visitors. The attractions are its beaches, seashores and conservation areas; and Provincetown's charming downtown, which includes a number of shops, galleries, accommodations, and dining options, as well as an active night life. Parking in Provincetown is limited, and much of Provincetown's commercial area is walkable. **Figure II-3** is a map showing Provincetown's local context.

Figure II-3
Map of Provincetown Local Context



Note: Purple Star shows location of Provincetown downtown, Red Star shows a primary access to Provincetown Beaches. Source: GoogleMaps; ConsultEcon, Inc.

Proposed Location

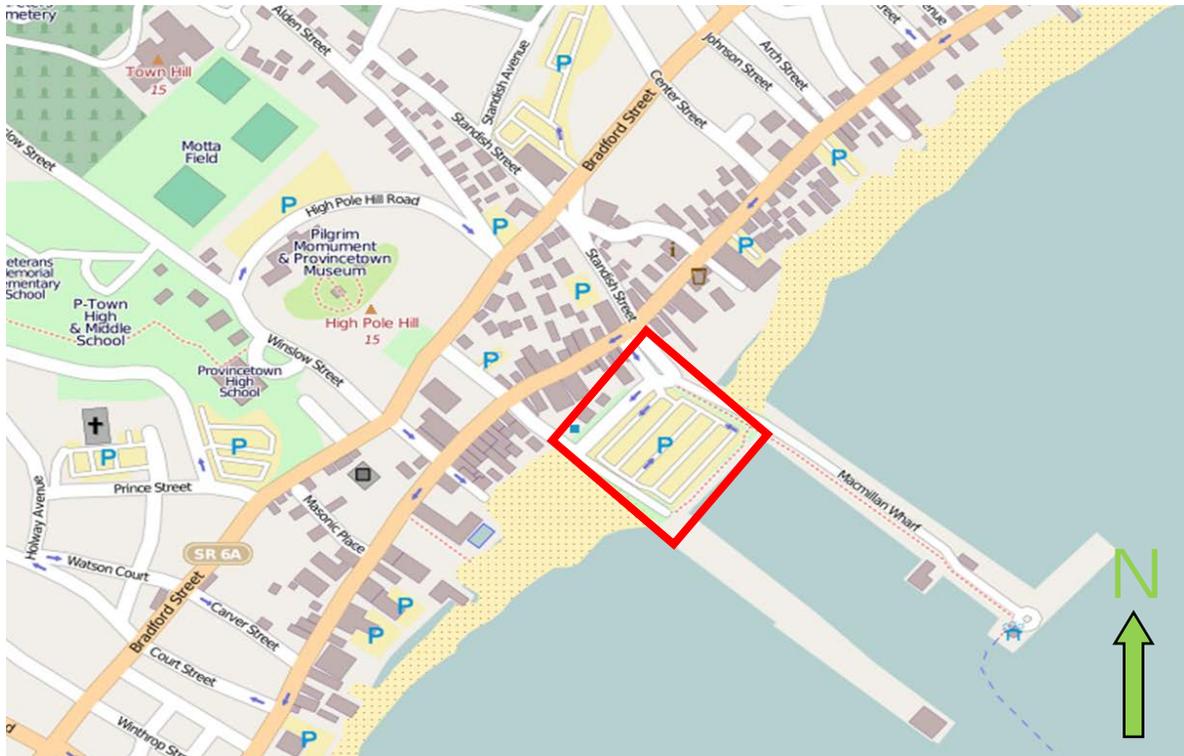
The preferred location for the VIC is at the Municipal Parking Lot / Transportation Hub, on the waterfront by MacMillan Pier. **Figure II-4** is a map of the downtown neighborhood in Provincetown and the preferred location. The Provincetown 365 report (Nov. 2014) also suggested that this area should be re-planned to include the Gerry E. Studds Stellwagen Bank Visitor Information Center.

This location is preferred because it is in the centroid of commercial and transportation activity; has a strong relationship to the water; and, is visible to both MacMillan and Fisherman's Wharves, as well as the remaining parts of the parking lot and Commercial Street, the heart of the tourist district. This Town owned location is the centroid of downtown activity, and is accessible by foot, bike, boat, ferry, bus and auto. Further, it is adjacent to compatible and complimentary uses, including visitor amenities, shops, and restaurants.

Figure II-5 is a satellite view of the location. **Figure II-6** is a photograph of the municipal parking area. Both have outlines of the preferred location.

The preferred VIC location was selected among six potential locations identified by the client group. A discussion of the other sites considered is included in **Appendix A**.

Figure II-4
Map Showing Preferred Location



Note: Red square shows location of preferred site.
Source: Town of Provincetown; ConsultEcon, Inc.

Figure II-5
Satellite Image Showing Preferred Location



Note: Yellow square shows location of preferred site.
Source: Town of Provincetown; ConsultEcon, Inc.

Figure II-6
Photograph Showing Location of Preferred Site

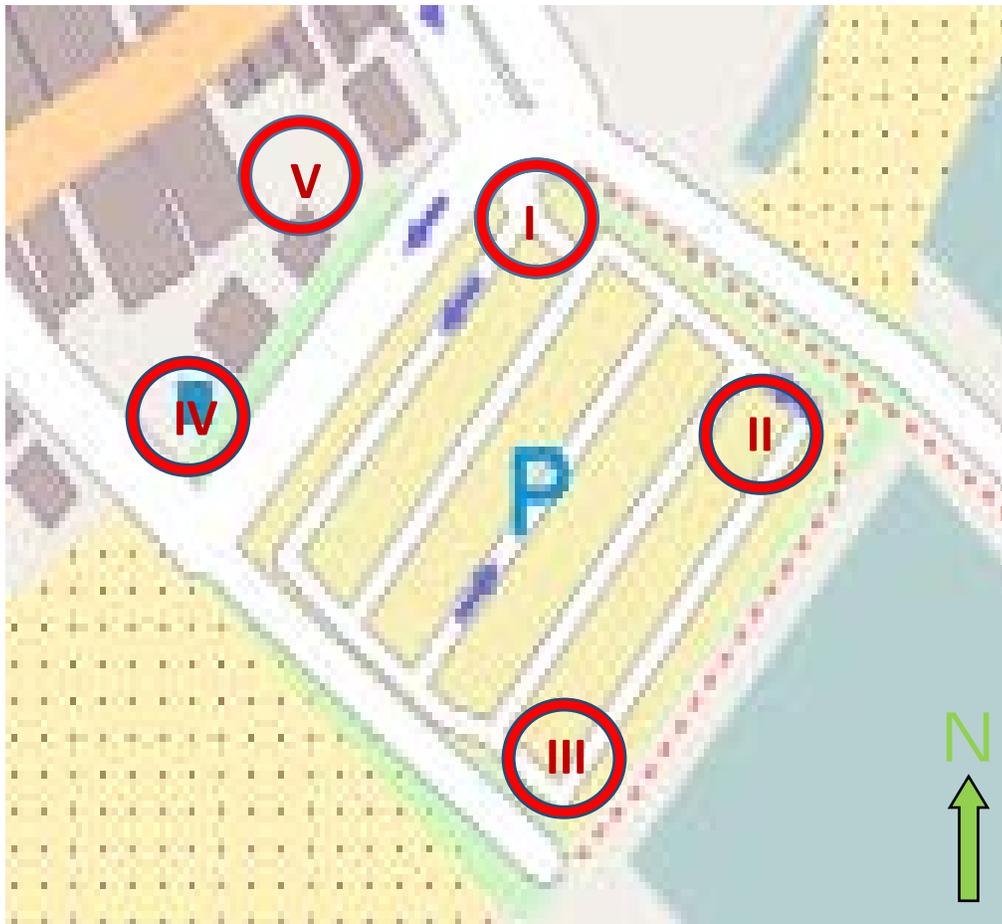


Source: ConsultEcon, Inc.

Preferred Interpretive Center Site Location

The Municipal Parking Lot (MPL) and the adjacent Transportation Hub on Ryder Street Extension are within the preferred location. Within this waterfront location there are a number of alternative sites that can be considered for the VIC. The opportunity to rework the waterfront area that this project could initiate is viewed by committee participants as being beneficial to the Town; but it is recognized that a master plan or implementation plan has not been undertaken that would contribute to the selection of the optimum site. The final decision on a site within the waterfront area will depend on further planning and design. **Figure II-7** shows these sites within the preferred location followed by **Figure II-8**, which includes a review of the characteristics of sites within the waterfront location.

Figure II-7
Potential Interpretive Center Sites within the MPL and Transportation Hub



Source: Town of Provincetown; ConsultEcon, Inc.

Site I is considered by ConsultEcon to optimize connections by users of MacMillan Pier, maximize visibility and accessibility to Commercial St. for both tourist and resident use; and to be at a higher elevation to minimize long term climate and weather risk related risk. In addition, this location will offer easy drop off and pick-up for groups. This or any waterfront site will work best and have the greatest benefit if sited and developed within a master planned redevelopment of the MPL and Transportation Hub and Ryder Street area.

**Figure II-8
 Evaluation of Alternative Sites in the Preferred Location**

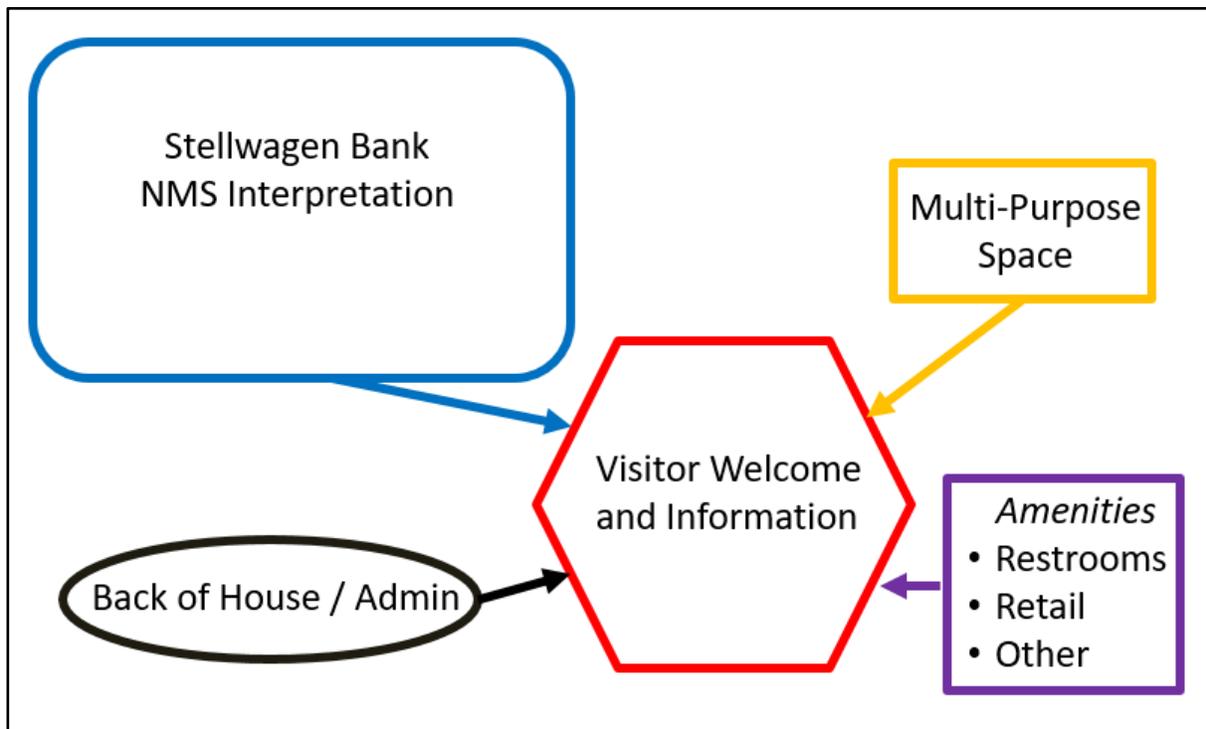
	Comments
I	This site has a strong relationship to Macmillan wharf, as most people would pass by it. It would have excellent visibility from Commercial St. and especially Lopes Square. Based on the factors cited in this report, this is the preferred location subject to further future investigations.
II	This site has a strong relationship to Macmillan wharf, Lacks proximity to Commercial Street and the distance would reduce recognition by and use by the general visitor's on Commercial Street.
III	This site has a strong relationship to Fisherman's wharf, Lacks proximity to Macmillan Wharf and to Commercial Street. The distance would reduce recognition by and use by the general visitor's on Commercial Street.
IV	This site offers good opportunities to be a basis for reconfiguring the transportation hub area. Lacks proximity to Macmillan Wharf and would have limited visibility and relationship to Commercial Street.
V	This site offers good opportunities to be a basis for reconfiguring the transportation hub area and could occupy a relatively underutilized space in that zone. This site will not be able to be combined with the Chamber of Commerce Building, as the Chamber has indicated that such combination would not be in their best interests. Thus the Visitor Center would not have good visibility from Commercial St. and Lopes Square which are critical to success. Further, the Visitor Center would have to be designed within the context of backing up to the existing buildings.

Source: ConsultEcon, Inc.

Project Concept

The proposed VIC is proposed as a 9,300 square foot facility featuring interpretive exhibits interpreting the diversity of wildlife and natural value preserved by the Gerry E. Studds Stellwagen Bank National Marine Sanctuary. The VIC would also include a multi-purpose space, visitor amenities, such as restrooms and retail, and back of house administrative space. **Figure II-9** is a relationship diagram, showing the proposed relationship of spaces within the facility.

Figure II-9
Relationship Diagram of Proposed Visitor Information Center



Source: ConsultEcon, Inc.

Data in **Table II-1** summarize a preliminary program of spaces for the proposed VIC. The preliminary program of spaces accounts for Public Space, Interpretive Space, and Operations / Back of House Space. There are a number of alternatives possible within the preliminary program of spaces, and NOAA and possible partners could occupy different areas or share as future operations indicate. The three principal types of spaced can be described as follows:

- ◆ **Public Space** that would include a lobby/ entrance space; Stellwagen information desk; concierge desk to include information on Provincetown; public restrooms; community meeting/flex space; partner retail sales area; and possibly vending and coat room.
- ◆ **Interpretive Space** that would include permanent Stellwagen exhibits; a Stellwagen Immersive exhibit area; a partner exhibit area; and possibly a temporary exhibit area for rotating and or visiting exhibits; and a small theater space.

- ◆ **Operations/Back of House Space** that would include office space; storage space; custodial and maintenance space, building systems space, including a possible elevator; catering or warming kitchen; staff/volunteer break room and bathrooms.

Based on the assumptions that **Table II-1** was based on, the VIC is assumed to be in a 15 percent range, smaller or larger, around the proposed 9,300 SF mid-range facility size at 7,940 to 10,750 gross square feet. Final size, program of spaces and design will depend on more detailed planning and development. The facility square footage includes a 25 percent grossing factor above the net square feet of program elements included to account for wall spaces, internal circulation, mechanical spaces, etc.

Each preliminary facility program element is subject to more refined planning. Additional opportunities for program expansion may come in the planning process or even as add-on development phases. These could include substantial general Visitor Information Center elements (likely to be related to Provincetown or other tourism partners) or expansion of interpretive elements. These additional elements could include revenue generating opportunities, such as a concierge desk / sale of recreation experiences; sponsored signage, or enhanced retail offerings. Conversely, more limited involvement of partners might eliminate some of the elements that are included in the Table II-1 program of spaces. Within the program of spaces shown, a situation with less partner on-site activity would indicate a VIC at the lower size range; if there is substantial participation by partners, the VIC might be at the mid-range or higher size range.

Table II-1
Conceptual Program of Spaces - Visitor Information Center

Program Area (Net Square Feet)	Low Range	Mid-Range	High Range
<u>Public Space</u>			
Lobby/Entrance Space	400		600
Stellwagen Information Desk	150		200
Concierge Desk	150		200
Public Restrooms	500		800
Community Meeting/Flex Space	800		1,000
Partner Retail Sales Area	200		300
Possible:			
Vending	50		75
Coat Room	50		75
Subtotal	2,300	2,775	3,250
<u>Interpretive Space</u>			
Permanent Stellwagen Exhibit	1500		2000
Stellwagen Immersive Theater Exhibit Area	500		600
Partner Exhibit Area	500		600
Possible:			
Temporary Exhibit Area	500		600
Subtotal	3,000	3,400	3,800
<u>Operations/Back of House Space</u>			
Office Space	150		200
Storage Space	100		150
Custodial and Maintenance Space	100		150
Building Systems Space	300		400
Staff/Volunteer Break Room and Bathrooms	200		300
Possible:			
Elevator	100		150
Catering or Warming Kitchen	100		200
Subtotal	1,050	1,300	1,550
<u>Total Component Mid-Range Net SF</u>			
Public Space		2,775	
Interpretive Space		3,400	
Operations/Back of House Space		1,300	
Total		7,475	
25% Gross Up		1,868.75	
Total Gross Building SF		9,343.75	
Rounded		9,300.00	

Source: ConsultEcon, Inc.

Site Review Summary

The Gerry E. Studds Stellwagen Bank National Marine Sanctuary encompasses a total of 638 square nautical miles or 842 square miles. The sanctuary is just three miles from Provincetown the proposed location for the Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Information Center.

The preferred location for the Visitor Information Center is on the land that is currently the Municipal Parking Lot, on the waterfront by MacMillan Pier. This location is preferred because it is in the centroid of commercial and transportation activity; has a strong relationship to the water; and, is visible to both MacMillan and Fisherman's Wharves, as well as the remaining parts of the parking lot and Commercial Street, the heart of the tourist district. This Town owned location is the centroid of downtown activity, and is accessible by foot, bike, boat, ferry, bus and auto. Further, it is adjacent to compatible and complimentary uses, including visitor amenities, shops, and restaurants.

The Municipal Parking Lot (MPL) and the adjacent Transportation Hub on Ryder Street Extension are within the preferred location. Within this waterfront location there are a number of alternative sites that can be considered. The opportunity to rework the waterfront area that this project could initiate is viewed by committee participants as being beneficial to the Town; but it is recognized that a master plan or implementation plan has not been undertaken that would contribute to the selection of the optimum site. The final decision on a site within the waterfront area will depend on further planning and design.

The VIC is proposed as a 9,300 square foot facility featuring interpretive exhibits describing the diversity of wildlife and natural value preserved by the Gerry E. Studds Stellwagen Bank National Marine Sanctuary. The VIC would include a multi-purpose space, visitor amenities, such as restrooms and retail, and back of house administrative space. This is the mid-range facility size that could be larger or smaller depending on the planning process and the involvement of project partners. Additional opportunities for program expansion may come in the future, including substantial Visitor Information Center elements, depending on future

planning and design phases, as well as the development of partnerships with other key stakeholders. Within the program of spaces shown, a situation with less partner on-site activity would indicate a VIC at a lower size range; if there is substantial participation by partners, the VIC might be at the mid-range or a higher size range.

Section III

MARKET CONTEXT

The following section reviews markets available to the proposed Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center in Provincetown for public programming opportunities and general visitation. It reviews local and regional resident markets, tourist markets, local attractions and comparable programming offered by organizations on Cape Cod.

RESIDENT MARKET

The Resident Market Area for this type of attraction is defined as the area whose residents would visit the Visitor Interpretive Center as part of a day trip or weekend get-away. Resident Markets are analyzed within a “gravity model” context, which means that the closer residents live to an attraction, the more likely they are to visit.

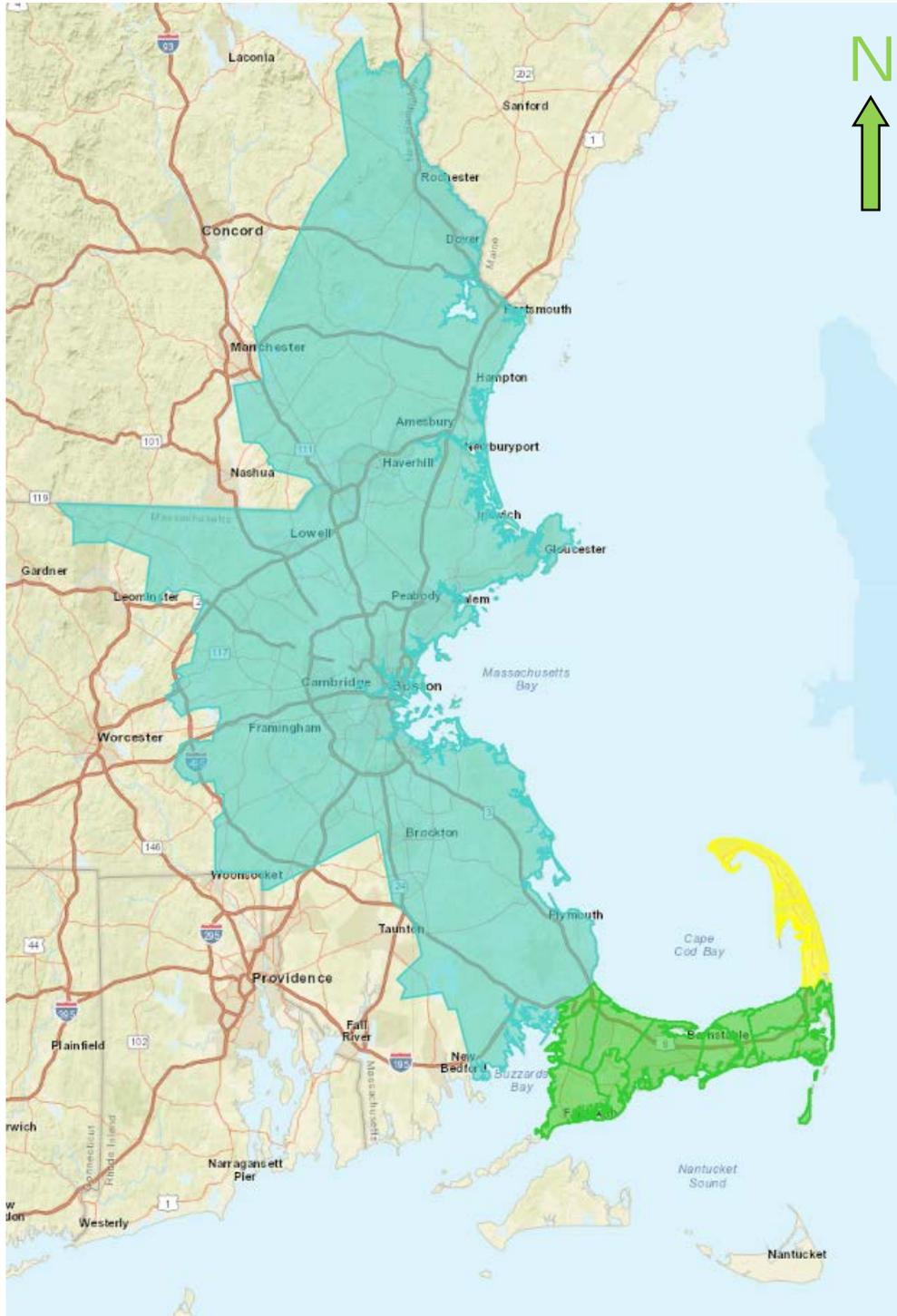
Resident Market Definition

The demographic characteristics of the local Resident Market have been analyzed to inform the understanding of current visitation patterns and to inform the analysis of future attendance potential. For the purposes of this study, the Resident Market Area has been defined based on the geographies who can currently reach Provincetown easily in the course of a day trip. The Resident Market Area was delineated into three market areas:

- ◆ The Primary Market Area is defined as the communities in the Outer Cape, including Provincetown, Truro, Wellfleet, and Eastham.
- ◆ The Secondary Market Area is defined as the remainder of Cape Cod, including the communities of Orleans, Chatham, Harwich, Brewster, Dennis, Yarmouth, Hyannis, Barnstable, Mashpee, Falmouth, and Sandwich.
- ◆ The Tertiary Market Area is defined as the Boston Metropolitan Statistical Area.

Figure III-1 is a map of the Resident Market Area.

Figure III-1
Map of Resident Market Area
Gerry E. Studts Stellwagen Bank NMS Visitor Interpretive Center Provincetown



Source: ESRI; ConsultEcon, Inc.

Tertiary Market Area’s Dual Resident / Tourism Characteristics

Because of Provincetown’s destination tourism profile and its location, the Boston Metropolitan Statistical Area contributes a major portion of Provincetown’s annual tourists. Therefore the Boston metro area has both resident and tourist market characteristics. As such, the Tertiary Market Area’s market potential to visit the Visitor Interpretive Center will be analyzed in this report based on the tourism market analysis to avoid double counting of visitation potential. However, it is useful to profile in this resident market section the characteristics of the Tertiary Market Area which has an established travel pattern to Provincetown and which can readily make day trips or short vacations to Provincetown.

Population Trend

Data in **Table III-1** summarize the population trend in the Resident Market Area. There were an estimated 4.96 million people residing in the Resident Market Area in 2016. This population is projected to grow 3.9 percent to 5.16 million by 2021. The area of highest projected growth is the Primary Market Area, where growth is projected at 5.4 percent. The rate of growth in the Resident Market Area is projected to be slightly faster than the Commonwealth of Massachusetts, but slightly slower than the United States as a whole, where the populations are projected to grow 4.2 percent and 3.4 percent, respectively.

Table III-1
Resident Market Population Trend, 2010, 2016, 2021
Gerry E. Studts Stellwagen Bank NMS Visitor Interpretive Center Provincetown

	2010	2016	2021	% Change 2016-2021
Primary Market Area	12,651	13,775	14,517	5.4%
Secondary Market Area	203,237	209,638	214,778	2.5%
Tertiary Market Area	4,552,402	4,739,348	4,929,486	4.0%
Total Resident Market Area	4,768,290	4,962,761	5,158,781	3.9%
<i>Commonwealth of Massachusetts</i>	<i>6,547,629</i>	<i>6,780,933</i>	<i>7,009,033</i>	<i>3.4%</i>
<i>United States</i>	<i>308,745,538</i>	<i>323,580,626</i>	<i>337,326,118</i>	<i>4.2%</i>

Source: U.S. Census Bureau 2010 Census; ESRI Population Projections, 2016-2021; ConsultEcon, Inc.

Age Profile

Data in **Table III-2** summarize the age profile in the Resident Market Area. The data show that the population of the Resident Market Area on the whole is on par with the population of the State and the Country, with a median age of 39.8, compared to 39.8 in the State and 38.0 in the U.S. as a whole. However, the median age in the Primary and Secondary market areas is significantly higher, at 56.3 and 51.7, respectively. In those areas, the population aged 55 and older make up nearly half of the population.

Table III-2
Resident Market Age Profile, 2016
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

	Median Age	0-17	18-24	25-34	35-54	55-64	65+
Primary Market Area	56.3	10.6%	4.1%	7.8%	24.8%	22.3%	30.4%
Secondary Market Area	51.7	16.2%	6.7%	9.0%	23.2%	17.2%	27.7%
Tertiary Market Area	39.2	20.9%	10.0%	13.9%	26.8%	13.2%	15.2%
Total Resident Market Area	39.8	20.7%	9.9%	13.7%	26.6%	13.4%	15.8%
<i>Commonwealth of Massachusetts</i>	<i>39.8</i>	<i>20.9%</i>	<i>10.1%</i>	<i>13.3%</i>	<i>26.5%</i>	<i>13.5%</i>	<i>15.9%</i>
<i>United States</i>	<i>38.0</i>	<i>22.9%</i>	<i>9.7%</i>	<i>13.6%</i>	<i>25.9%</i>	<i>12.8%</i>	<i>15.0%</i>

Source: U.S. Census Bureau 2010 Census; ESRI Population Projections, 2016-2021; ConsultEcon, Inc.

Data in **Table III-3** summarize the population of children aged 5 to 17 in the Resident Market Area. Data in the table show that the Resident Market Area had an estimated population of 772,000 children between the ages of 5 and 17 in 2016. This population is projected to decline 2.8 percent by the year 2021 to 751,000. This is largely due to declines in the Secondary and Tertiary Market Areas, which outweigh the projected 2.2 percent growth in the primary market area. These rates of projected growth are on par with the State as a whole, but lower than in the Country as a whole, where the population of school age children is projected to grow 1.3 percent by 2021.

Table III-3
Population of School Age Children, 2016, 2021
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

	2016	2021	% Change 2016-2021
Primary Market Area	1,122	1,147	2.2%
Secondary Market Area	25,873	25,281	-2.3%
Tertiary Market Area	745,185	724,345	-2.8%
Total Resident Market Area	772,180	750,773	-2.8%
<i>Commonwealth of Massachusetts</i>	<i>1,062,945</i>	<i>1,032,877</i>	<i>-2.8%</i>
<i>United States</i>	<i>54,101,834</i>	<i>54,840,778</i>	<i>1.4%</i>

Source: U.S. Census Bureau 2010 Census; ESRI Population Projections, 2016-2021; ConsultEcon, Inc.

Household Profile

Data in **Table III-4** summarize the household profile for the Resident Market Area. The data show that the Secondary and Tertiary Market Areas have a household profile somewhat similar to the State as a whole, with about 62 percent of households identifying as family households, and an average household size around 2.5. The primary market area is more oriented toward single individual households with an average household size of 1.95 and 48.4 percent of households identifying as family households. Overall, these data show a household market somewhat less family oriented compared to the United States as a whole.

Table III-4
Resident Market Household Profile, 2016
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

	Number of Households	Number of Families	Percent Families to Total Households	Average Household Size
Primary Market Area	7,033	3,405	48.4%	1.95
Secondary Market Area	91,696	56,877	62.0%	2.24
Tertiary Market Area	1,825,779	1,137,380	62.3%	2.51
Total Resident Market Area	1,924,508	1,197,662	62.2%	NC
<i>Commonwealth of Massachusetts</i>	<i>2,625,978</i>	<i>1,646,226</i>	<i>62.7%</i>	<i>2.49</i>
<i>United States</i>	<i>121,786,233</i>	<i>80,307,260</i>	<i>65.9%</i>	<i>2.59</i>

Source: U.S. Census Bureau 2010 Census; ESRI Population Projections, 2016-2021; ConsultEcon, Inc.

Household Income

Data in **Table III-5** summarize the household income profile for the Resident Market Area. The data show that the overall Resident Market Area is more affluent than the Commonwealth and the United States as a whole. The Resident Market Area has a median household income of \$76,100, compared to \$69,500 in the state and \$54,100 in the country as a whole. The most affluent households can be found in the Tertiary Market Area, where the median household income is estimated at \$77,800 and an estimated 38.8 percent of the households earn incomes of over \$100,000 per year. The Primary Market Area has a median household income of \$57,100, which is more in line with the income profile of the United States as a whole.

**Table III-5
 Household Income Profile, 2016
 Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

	Median Household Income	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 +
Primary Market Area	\$57,094	19.4%	24.1%	17.6%	11.1%	27.8%
Secondary Market Area	\$62,752	17.1%	22.4%	17.6%	12.9%	30.1%
Tertiary Market Area	\$76,809	16.9%	17.1%	14.8%	12.4%	38.8%
Total Resident Market Area	\$76,067	16.9%	17.4%	15.0%	12.4%	38.3%
<i>Commonwealth of Massachusetts</i>	<i>\$69,456</i>	<i>18.9%</i>	<i>18.4%</i>	<i>15.3%</i>	<i>12.4%</i>	<i>35.1%</i>
<i>United States</i>	<i>\$54,149</i>	<i>22.6%</i>	<i>23.4%</i>	<i>17.7%</i>	<i>12.3%</i>	<i>24.1%</i>

Source: U.S. Census Bureau 2010 Census; ESRI Population Projections, 2016-2021; ConsultEcon, Inc.

Resident Market Summary

Attendance to the Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center is likely to be made up in part by residents of Provincetown and the remainder of Cape Cod as well as tourists who arrive by auto, boat, bus or by air. The Primary Market Area was defined as the four outermost communities on Cape Cod, including Provincetown, Truro, Wellfleet, and Eastham, the Secondary Market Area was defined as the remaining communities on Cape Cod. In addition, the Boston Metropolitan Statistical Area has been profiled in this resident market section to demonstrate and evaluate the large nearby market area that contributes a substantial part of Provincetown’s visitor base and is designated as the Tertiary Market Area of Provincetown.

As defined, the Primary and Secondary Market Areas – Cape Cod – has a 2016 population of 223,000, and the adjacent Tertiary Market Area the Boston Metropolitan Statistical Area has a population of 4.74 million. The total market area is projected to grow 3.9 percent to 5.16 million by 2021. This rate of growth is somewhat greater than that in the Commonwealth of Massachusetts as a whole, but slower than the growth for the United States as a whole. The primary market area is only a small portion of this population, about 14,000, which is

projected to grow 5.4 percent by 2021. The population of the Total Resident Market Area has the following demographic characteristics:

- ◆ A median age of 39.8, indicating a population about the same age as the Commonwealth, but slightly older than the Country as a whole. The median age in the Primary and Secondary Market Areas is significantly higher than the in the Resident Market as a whole, at 56.3 and 51.7, respectively.
- ◆ A population of school age children estimated at 772,000, a population that is projected to decrease by 2.8 percent by 2021.
- ◆ An average household size of 1.95 in the Primary Market Area, compared to 2.24 in the Secondary, 2.51 in the Tertiary, and 2.59 in the United States as a whole.
- ◆ A median household income of \$76,100, greater than the Commonwealth as a whole, and significantly greater than the Country as a whole. The median household income in the primary market area is most comparable to the Country as a whole.

Housing Characteristics

Because of Cape Cod's popularity as a seasonal tourism destination, second home ownership has increased substantially in Provincetown and throughout Barnstable County over the past decade. Data in **Table III-6** show the trend in total housing units and seasonal housing units. Compared to Cape Cod as a whole, Provincetown has a larger proportion of seasonal housing units. In 2014, 55.6 percent of Provincetown's 4,171 housing units were seasonal housing units, occupied either by second home owners or by seasonal renters. Between 2009 and 2014, the number of seasonal housing units increased an estimated 7.1 percent from 2,163 to 2,317, based on data from the American Community Survey.

**Table III-6
Trend in Total Housing Units and Seasonal Housing Units
in Provincetown and Cape Cod, 2000, 2009-2014**

	2000 (Census)	2009	2010	2011	2012	2013	2014	Percent Change 2009 to 2014
Provincetown								
Total Housing Units	3,712	4,373	4,353	4,290	4,335	4,128	4,171	-4.6%
For seasonal, recreational, or occasional use	1,768	2,163	2,317	2,509	2,512	2,262	2,317	7.1%
<i>Percent Seasonal</i>	47.6%	49.5%	53.2%	58.5%	57.9%	54.8%	55.6%	
Barnstable County Less Provincetown								
Total Housing Units	143,371	150,419	154,485	155,401	155,685	156,358	156,782	4.2%
For seasonal, recreational, or occasional use	45,248	49,587	52,381	54,307	55,599	56,247	57,631	16.2%
<i>Percent Seasonal</i>	31.6%	33.0%	33.9%	34.9%	35.7%	36.0%	36.8%	
Barnstable County								
Total Housing Units	147,083	154,792	158,838	159,691	160,020	160,486	160,953	4.0%
For seasonal, recreational, or occasional use	47,016	51,750	54,698	56,816	58,111	58,509	59,948	15.8%
<i>Percent Seasonal</i>	32.0%	33.4%	34.4%	35.6%	36.3%	36.5%	37.2%	

Source: U.S. Census Bureau, 2000 Decennial Census, American Community Survey 5-Year Estimates 2006-2009 -- 2010-2014; ConsultEcon, Inc.

Seasonal Residents and Renters

As noted above, a significant proportion of housing units on Cape Cod are for seasonal use as second homes or vacation rentals. According to a 2008 survey of second home owners on Cape Cod, 74 percent of second home owners are the exclusive users of their second homes, while 21 percent use their homes part-time and rent it out for the remainder of the season. The final 5 percent use their houses exclusively as a rental, occupying the home for no portion of the season.¹ Extrapolating from this survey data and Census data on seasonal housing resulted in an estimated 879,000 annual visitors in seasonal housing units, including 107,000 home owners, 380,000 guests of home owners, and 392,000 renters. A similar extrapolation was conducted on Provincetown's local housing stock, to give an estimated seasonal population of 35,000, comprising an estimated 17,000 exclusive owner use, 14,000 owner and renter use, and 5,000 exclusive renter use. According to the 2008 survey, an estimated 22 percent of second home owners plan on converting their second homes to year round

¹ 2008 Survey of Cape Cod Second Home Owners: Technical Report of Findings, UMass Donahue Institute, Nov. 12, 2008.

residences over the following 15 years. This shift in residency patterns will increase demand for goods and services, and likely increase participation in cultural activities and the base of volunteers on Cape Cod based on second home owners' demographic attributes. Second home owners on average are 60 years old, live in 2 person households without children at home, almost 80 percent have a bachelor's or post graduate degree, and over two-thirds earn more than \$100,000 annually.

TOURIST MARKET

Cape Cod's economy is heavily reliant on tourism. While there are no definitive studies, the volume of tourists to the Cape annually likely far outweighs the permanent resident population. Tourist origins, destinations within Cape Cod, demographic characteristics, levels of repeat visitation, length of stay, spending patterns and other such relevant information are not well-documented. However, it is clear that Cape Cod is a major tourist destination and that tourism is a primary basis of the local economy. A review of various indicators of tourism activity on the Cape follows.

Economic Impact

In 2012, tourists spent an estimated \$956.6 million in Barnstable County, accounting for 5.6 percent of travel-related spending statewide. This visitor spending resulted in an estimated 8,790 jobs with payroll of \$240.01 million, \$40.28 million in state taxes and \$57.5 million in local taxes in 2014. Visitor expenditures have increased 22 percent from \$785.2 million in 2009, the nadir of visitor spending subsequent to the economic recession in 2007 and 2008.

Accommodations

Hotel and motel rooms abound on the Cape. The available room supply peaks in summer and decreases substantially during the off season, as hotels and motels close for the season. A 2014 report indicated that there were a total of 3.5 million occupied room nights in Cape Cod

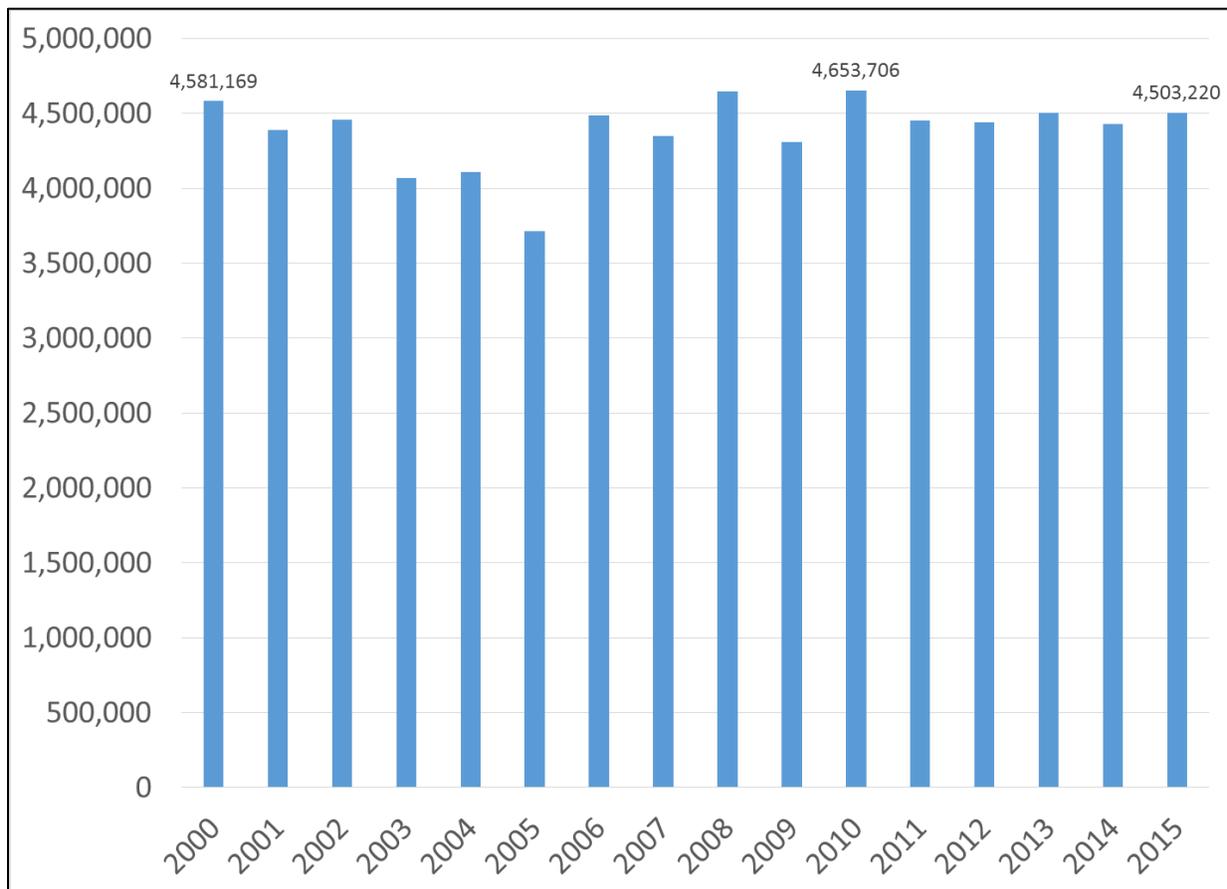
in 2012.² In 2015, the average occupancy rate ranged from a low of 32.1 percent in December to a high of over 82 percent in the August, with other high occupancy months falling between June and September. Many hotels achieve 100 percent occupancy rates during summer weekends and holidays.

Cape Cod National Seashore

Perhaps the most stable and longitudinal source of data on Cape tourism is visitation to the Cape Cod National Seashore. Although counting methods have changed from time to time, the Seashore has maintained visitation records for decades. Visitor counts are from automobile traffic counters at various Seashore parking areas. These counts are then transformed into estimated number of discreet visits by applying factors for number of passengers per vehicle. Data in **Figure III-2** show the total estimated number of visits to the Seashore from 2000 to 2015. The number of visitors to the Seashore has been relatively stable in recent years; the three year average for the years 2013 through 2015 is approximately 4.5 million visitors. About half of these visitors visit the Northern District, which encompasses Provincetown.

² *Market Assessment for Cape Cod, Massachusetts*, prepared for The Cape Cod Commission, prepared by the Chesapeake Group, Inc. February 2014.

Figure III-2
Trend in Visitation to Cape Cod National Seashore, 2000 - 2015



Source: National Park Service and ConsultEcon, Inc.

Traffic near Sites in Provincetown

Data on Seashore vehicle traffic is also available for distinct locations, including Race Point Beach, Herring Cove Beach, and the Provincetown Visitor Center, three areas closest to Provincetown. Data in **Table III-7** show the number of vehicles to Race Point Beach, Herring Cove Beach and the Provincetown Visitors' Center from 2010 to 2015. Over the past six years traffic at Herring Cove Beach has averaged over 832,000 vehicles, the highest among the three sites. At Race Point Beach, the traffic has averaged over 417,000 vehicles during the same period, and traffic at Provincetown Visitors' Center has averaged 289,000 vehicles.

Table III-7
Traffic Counts to Selected Sites near Provincetown
Cape Cod National Seashore

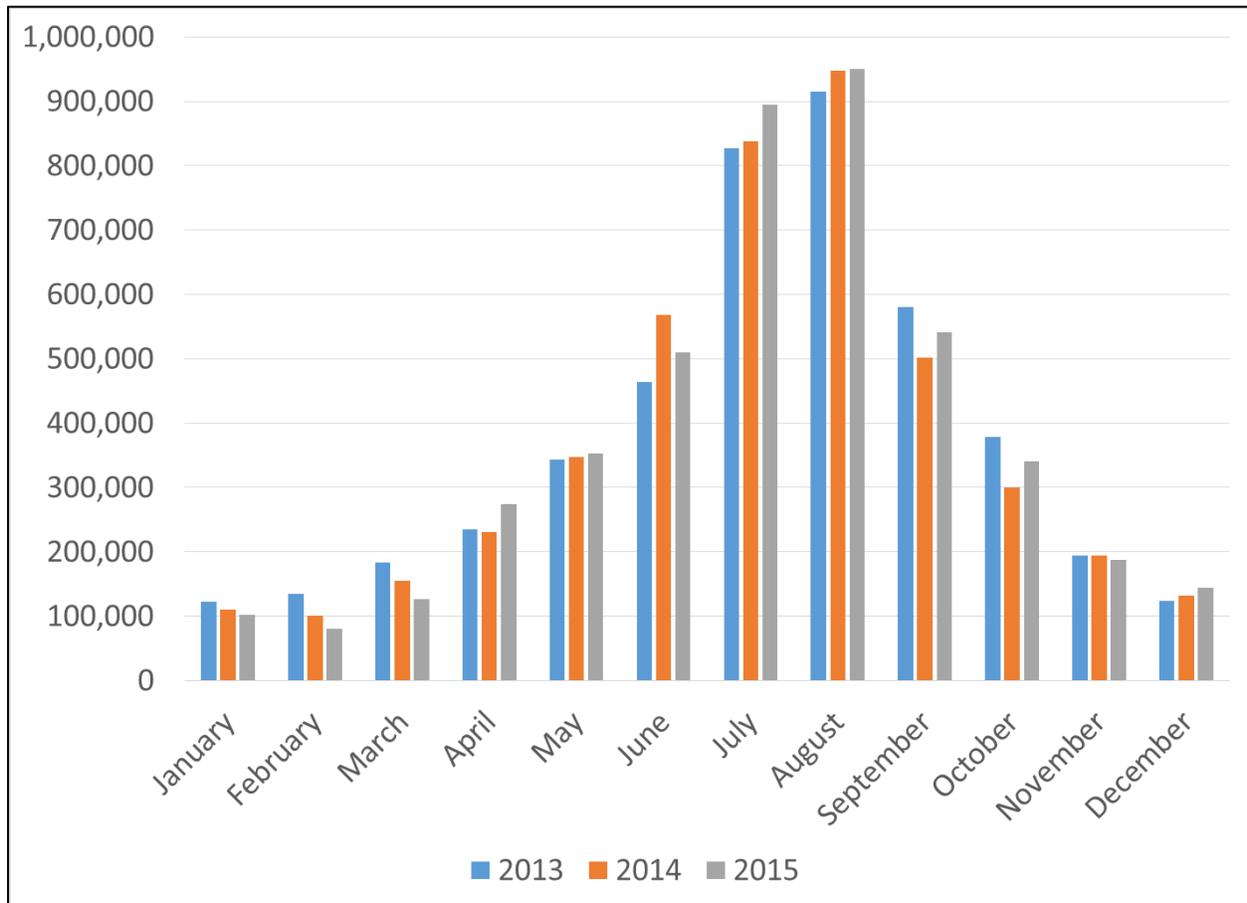
Estimated Number of Recreational Visitors	2010	2011	2012	2013	2014	2015	Six-Year Average
Herring Cove Beach	816,023	853,295	876,020	848,630	796,898	802,500	832,228
Race Point Beach	465,965	363,392	339,114	488,337	432,424	412,339	416,929
Province Lands Lot	292,791	314,967	307,662	275,505	256,545	284,118	288,598
<u>Percent Change from Prior Year</u>							
Herring Cove Beach		4.6%	2.7%	-3.1%	-6.1%	0.7%	
Race Point Beach		-22.0%	-6.7%	44.0%	-11.4%	-4.6%	
Province Lands Lot		7.6%	-2.3%	-10.5%	-6.9%	10.7%	

Source: National Park Service; ConsultEcon, Inc.

Seasonality

Visitation and associated traffic to the Seashore reflect a highly seasonal pattern, as shown by data in **Figure III-3**. Nearly two thirds of visitation to the Seashore and traffic to Provincetown area sites occurs during the four month period between June and September, with July and August the peak months for visitation.

Figure III-3
Seasonal Pattern in Cape Cod National Seashore Visitation and Traffic



Source: National Park Service and ConsultEcon, Inc.

Local Visitor Attractions and Intercept Points

The biggest attraction in Provincetown is its beaches—a reported 80 percent of Provincetown's land mass is part of the Cape Cod National Seashore, which attracts millions of visits each year. Beyond nearby beaches, the Outer Cape has a number of small attractions and visitor intercept points with different interpretive themes, which attract different types of visitors. Data in **Table III-8** summarize some of the operational characteristics of these key visitor attractions and intercept points, which may be comparable or competitive with the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center. **Figures III-4** through **III-9** are photographs of these facilities.

**Table III-8
Selected Attractions in the Outer Cape**

Name	Location	Seasons of Operation	Hours	Attendance	Admission	Dedicated Parking	Size in SF	Primary Interpretive Theme	Retail
Province Lands Visitor Center (CCNS / NPS)	171 Race Point Rd, Provincetown, MA 02657	May 1 through October 31	Daily from 9:00 am to 5:00 pm	280,000	Free	Yes - Estimated 100 parking spaces.	5,000	Cape Cod National Seashore, Province Lands Dunes, Outer Cape Beach, Atlantic Ocean	Yes
Salt Pond Visitor Center (CCNS / NPS)	50 Nauset Rd, Eastham, MA 02667	Year Round	Daily 9:00 am to 4:30 pm.	440,000	Free	Yes - Estimated 120 parking spaces.	14,000	Cape Cod Glacial History, Gulf of Maine, Natural land-shaping phenomena, history of Cape Cod, native cultural history (Wampanoag)	Yes
Highland Lighthouse	27 Highland Light Rd, North Truro, MA 02652	May through October	Keeper's Shop open daily 10 a.m. - 6 p.m. Tours daily: 10 a.m. - 5:30 p.m.	Not Available	Admission is \$6 for adults; \$5 for students and seniors \$1 off with an admission ticket from the Highland House Museum	Yes - Estimated 80 parking spaces shared with Truro Historical Society Museum.	Not Available	Owned by NPS; gifts and Yes ticketing operated by Eastern National; light operated by coast guard. History of Cape Cod and significance of light house.	Yes
Audubon Center Wellfleet	291 US-6, South Wellfleet, MA 02663	Seasonal	Memorial Day- Columbus Day Daily, 8:30 am-5 pm Columbus Day- Memorial Day Tues-Sun, 8:30 am-5 pm	Not Available	Members: Free Nonmembers: \$5 Adults \$3 Children (2-12) \$3 Seniors (65+)	Yes - Estimated 80 parking spaces.	10,000	MA local wildlife, green architecture, environmental conservation, salt marsh and tidal flats.	Yes
Pilgrim Monument and Provincetown Museum	1 High Pole Hill Rd, Provincetown, MA 02657	Seasonal	April 1 - Memorial Day, 9am - 5pm Memorial Day - Labor Day, 9am - 7pm Labor Day - November 30, 9am - 5pm Closed Thanksgiving Day	94,000	\$12 - adults \$10 - senior citizens (65 and older) \$4 - children 4-12 Free Admission for Members and children 3 & under	Yes - \$12.00 parking lot admission. Estimated 120 parking spaces.	Not Available	History of MA colony through Mayflower Pilgrims, as well as history and culture of Provincetown.	Yes
Expedition Whydah	Macmillan Pier	Seasonal	10 to 5 daily May through October	Not Available	Regular: \$10.00 Seniors & Youngsters (6-12) \$8.00 Children under 6: FREE!	No - pedestrian access	Not Available	Pirate museum interpreting historic shipwrecks and pirate activity around Cape Cod.	Yes

Source: Facilities Listed; National Parks Service; MassAudubon

Figure III-4
Province Lands Visitor Center



Source: National Park Service

Figure III-5
Salt Pond Visitor Center



Source: National Park Service

Figure III-6
Highland Light



Source: National Park Service

Figure III-7
Audubon Center Wellfleet



Source: ad-archts.com

**Figure III-8
Pilgrim Monument and Provincetown Museum**



Source: Pilgrim-monument.org

**Figure III-9
Expedition Whydah**



Source: Trip Advisor, User WhydahGalley

Another local potential partner for the proposed Gerry E. Studts Stellwagen Bank NMS Visitor Interpretive Center is the Provincetown Art Association and Museum (PAAM). Provincetown is recognized as the country's oldest active "art colony," attracting artists from around the

world for the area's natural beauty. PAAM was established in 1914 by a group of artists and local residents to build a permanent collection of works by artists of the Outer Cape and to exhibit art year-round and reinforce the community. The PAAM has become the Cape's most widely attended art museum with annual attendance of about 52,000. The museum is located on Commercial Street, about a 10 minute walk from MacMillan Pier and the central downtown shopping district.

Tourism in Provincetown

The Town of Provincetown is located at the outermost tip of Cape Cod approximately 62 miles from the Sagamore Bridge. Although Provincetown is readily accessed by auto and is a major destination, it is well over a one-hour drive from most locations on the "Inner Cape." Little "hard data" is available on tourism levels in Provincetown; however, there are some indicators of the relative levels of tourism including: ferry service, hotel/motel rooms tax collections, data on local attractions, whale watching, and National Seashore visits (reviewed earlier in this section). While most people arrive by vehicle, the number of people arriving from Boston & Plymouth by ferry is reported to be more than 130,000. Provincetown's year round population is just under 3,000 people, which reportedly increases to 18,000 people in the summer, due to people who live there throughout the entire season. In July and August, there are reported to be anywhere from 35,000 to 60,000 visitors in Provincetown on a daily basis, with the actual number dependent on weekend activity and event schedule.

Whale Watching

Gerry E. Studds Stellwagen Bank National Marine Sanctuary is the most popular whale watching location in New England; its underwater plateau attracting a variety of marine wildlife and, subsequently, humans. Provincetown is among the top departure ports for such whale watching excursions, the others being primarily in Plymouth, Gloucester, and Boston. The whale-watching season generally lasts from April until October. According to NOAA there are an estimated one million passengers on whale watching trips each year in the waters off Eastern Massachusetts. Another source reported that 250,000 to 300,000 people go whale

watching out of Provincetown annually. During peak whale watching season it is estimated that 55 whale watching boats can be found on Stellwagen Bank daily.

Whale watching started in Provincetown in 1975, when scientists from the Center for Coastal Studies teamed up with local charter fishing captains to observe and study the three species of whales found in the nearby waters. Provincetown has two main whale watching companies and a number of boat charter services for private whale watching experiences. Three of these companies are listed on the NOAA website as whale watching companies. All three participants listed are participants in the Whale Sense program – a voluntary organization advocating for conscientious commercial whale watching practices. The main companies are:

- ◆ **Dolphin Fleet:** Family-run since 1975 the Dolphin Fleet owns four ships, each with a capacity of about 150 passengers. The fleet operates as many as twelve cruises every day during the peak season, though the number of trips may vary depending on demand and weather. Cruises usually last about 3-4 hours and boat amenities include a snack-bar, gift shop, and educational information from a trained naturalist. Whale sightings are guaranteed with a free ticket for a future excursion if the excursion is fruitless. Tickets for the 2016 season are \$47 for adults, \$31 for children 5-12, and free for children 4 and under. Those who book online are offered a \$2 discount.
- ◆ **Provincetown Whale Watch (Captain John Whale Watching & Fishing Tours):** This company owns a number of boats, but only one is designated for whale watching. Whale watch cruises depart daily at noon and last about 3-4 hours. Amenities on the boat include refreshments and beverages, as well as educational information from a naturalist about marine biology, whales, and Provincetown history. Tickets are \$47 for adults, \$31 for children 4-12, and free for children 4 and under. Following the common practice, whale sightings are guaranteed with a free ticket for a future excursion if the excursion is fruitless. The fleet also has ships departing from Plymouth.
- ◆ **SeaSalt Charters:** A boat service that offers charter whale watching and fishing trips for up to six passengers between May 1 and October 1. Fishing and whale watching trips can be booked for 3-4 hour trips. Private whale watching excursions are \$600 to \$650, depending on the month and time of day. Split charters are \$150 per person up to six people. Whale watch / fishing combination trips are typically 6 hours and cost up to \$950.

Tourist Market Summary

The Outer Cape market is characterized by a small number of local and regional residents and a large influx of tourists during the summer months. Provincetown's year round population is just under 3,000 people, which reportedly increases to 18,000 people in the summer, due to people who live there throughout the entire season. In July and August, there are reported to be anywhere from 35,000 to 60,000 people in Provincetown on a daily basis, with the actual number dependent on weekend activity and event schedule. These seasonal visitors and residents are the key market opportunity for the proposed Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center in Provincetown.

There are a number of activities and attractions in Provincetown and nearby towns that form the competitive context for the proposed visitor interpretive center. The most popular activity in the Outer Cape and the primary reason for visiting is going to the beach. Approximately 4.5 million recreational visitors come to the Cape Cod National Seashore (CCNS) annually and many of these visitors will be interested in complementary programming offered by the proposed National Marine Sanctuary Visitor Interpretive Center, especially programs offered in conjunction with CCNS. Some visitor intercept points on the Outer Cape have fairly low attendance and typically operate seasonally. Whale watching is very popular and is highly relevant to NOAA's operations and research in the area. According to NOAA there are an estimated one million passengers on whale watching trips each year in the waters off Eastern Massachusetts. Another source reported 250,000 to 300,000 people go whale watching out of Provincetown annually and adult tickets typically cost about \$47. During peak whale watching season it is estimated that 55 whale watching boats can be found on Stellwagen Bank daily.

Section IV

NOAA MARINE SANCTUARY PUBLIC OUTREACH SUMMARY

This section reviews the format of public outreach programming for the existing NOAA National Marine Sanctuaries and offers a summary of existing public outreach programming for the Gerry E. Studds Stellwagen Bank National Marine Sanctuary.

NOAA Sanctuary Public Outreach

The National Marine Sanctuaries Act was passed into law in 1972, allowing the Secretary of Commerce to designate and protect areas of the marine environment with national significance due to conservation, recreational, ecological, historical, scientific, cultural, archeological, educational or esthetic qualities as national marine sanctuaries. Each NOAA sanctuary works with diverse partners and stakeholders to promote responsible and sustainable ocean uses, including recreation, tourism, and commercial activities that drive coastal economies.

The Office of National Marine Sanctuaries serves as the trustee for over 170,000 square miles of marine waters for the United States. **Figure IV-1** is a map showing the locations of those sanctuaries.

Figure IV-1
Map of NOAA National Marine Sanctuary Locations



Source: NOAA

The individual sanctuaries are grouped into four regions. Individual sanctuaries and their programming are profiled in **Appendix B**. The system is organized as follows:

◆ **West Coast Region**

- Olympic Coast
- Cordell Bank
- Greater Farallones
- Monterey Bay
- Channel Islands

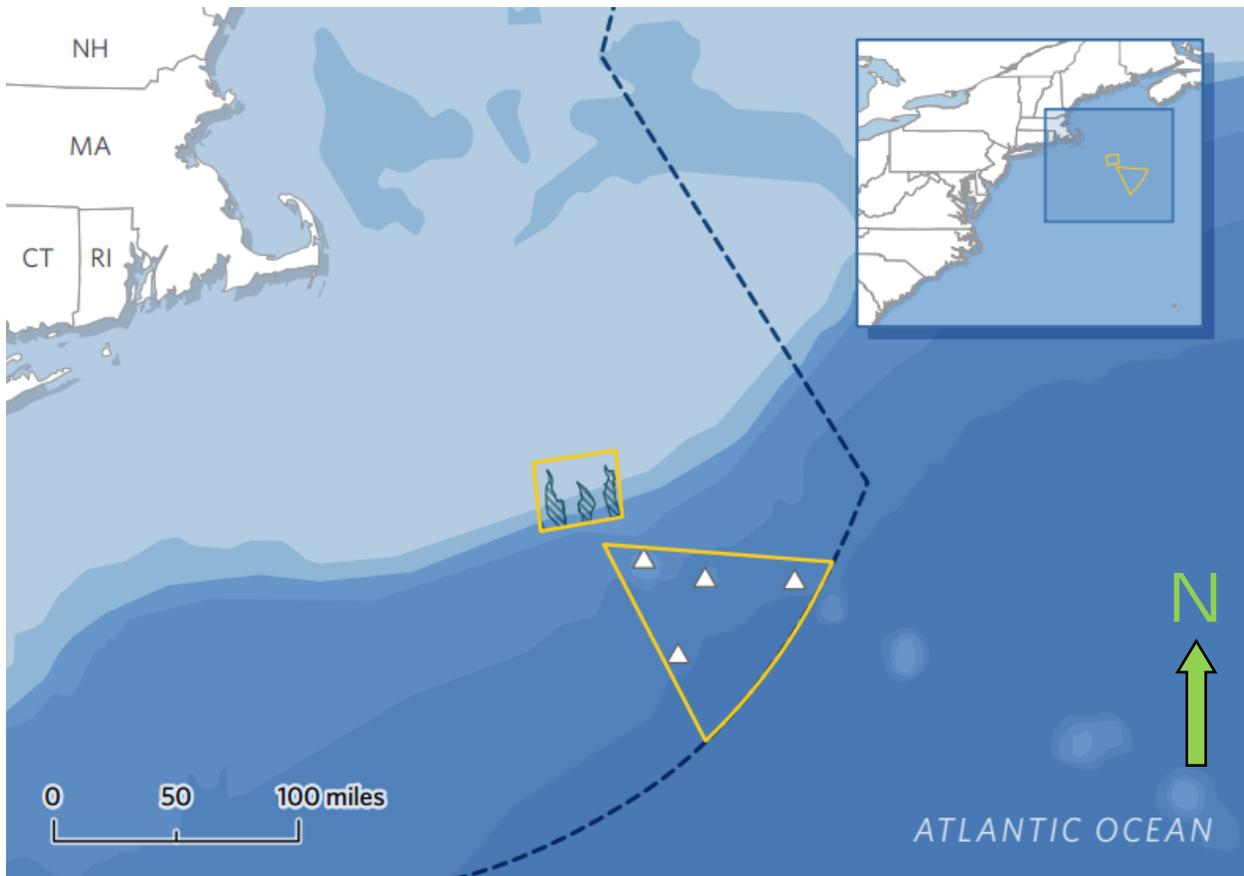
◆ **Southeast Region**

- Gray's Reef
- Florida Keys
- Flower Garden Banks

- ◆ **Pacific Islands Region**
 - Papahānaumokuākea Marine National Monument
 - Hawaii Humpback Whale
 - American Samoa
- ◆ **Northeast and Great Lakes Region**
 - Thunder Bay
 - Stellwagen Bank
 - Monitor
- ◆ **Proposed National Marine Sanctuaries**
 - Mallows Bay – Potomac River
 - Wisconsin – Lake Michigan

In addition to those listed above, President Barack Obama issued an executive order in September 2016 creating a new Marine National Monument, which will be included in this network. The Northeast Canyons and Seamount Marine National Monument was defined as 4,900 square miles off the Atlantic coast 150 miles to the Southeast of Cape Cod, preserved for the deep-water corals, anemones, and sponges, representing biodiversity of the Atlantic Ocean to be preserved for posterity. **Figure IV-2** is a map showing the location of this new Marine National Monument. Because of its relative proximity to the New England coast, there may be an opportunity for the Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center to offer interpretation of this marine resource, as well.

Figure IV-2
Map of Location of Northeast Canyons and Seamounts Marine National Monument



Source: Pew Charitable Trusts; ConsultEcon, Inc.

Educational and Outreach Programming

Each NOAA Sanctuary has a unique management plan in place that provides a structure for the sanctuary's relationship with other local and institutional partners. These include system-wide initiatives as well as localized partnerships and programs.

System-Wide Outreach Initiatives

The following are NOAA sanctuary system-wide educational and interpretive initiatives that most – if not all – of the sanctuaries report participating in.

- ◆ Get into Your Sanctuary Day events encourage visitation and provide opportunities for general public to practice safe, responsible wildlife viewing and nature photography, as well as educational opportunities.
- ◆ Educational and Educator Programs
 - Teacher at Sea Program for teaching educators about marine education.
 - LiMPETS (Long-term Monitoring Program and Experiential Training for Students) Teacher Workshops
 - ACES (Animals in Curriculum-Based Ecosystem Studies) Program
 - Coral Reef Workshop and Scuba diving Adventure for Teachers
 - Rivers to Reefs Workshop
 - Remotely Operated Vehicle Teacher Workshop
 - MERITO Academy (Multicultural Education for Resources Issues Threatening Oceans)
 - Charting a Course for Maritime Heritage Education Conference
 - BWET Grants – NOAA Bay Watershed Education and Training Program
- ◆ ANCHOR (Appreciating the Nations’ Cultural Heritage and Ocean Resources) program – NOAA National Marine Sanctuaries working with local dive businesses and charter operators to reduce human impacts on maritime heritage resources.
- ◆ Earth is Blue Annual magazine.
- ◆ Dr. Nancy Foster Scholarship Program – recognizing outstanding scholarship, funding NOAA mission-related graduate research in oceanography, marine biology, and maritime archaeology, including science, engineering, and resource management.

In addition to these programs and initiatives, there are at least 40 interactive National Marine Sanctuary Touch-Screen Kiosks located in key visitor intercept points around the United States. These kiosks offer a visual and auditory showcase of sanctuary offerings, allowing users to learn about the various activities at the sanctuary, educational outreach programs, real-time weather information and program information about individual sites, as well as the

National Sanctuary system as a whole. **Figure IV-3** is a map showing some of the kiosk locations.

Figure IV-3
Map of NOAA Sanctuary Interpretive Kiosk Locations
Current Kiosk Locations



Source: NOAA

Sanctuary Visitor Centers

One strategy for public outreach at National Marine Sanctuaries has been the development of Visitor Centers. There are currently ten visitor centers associated with National Marine sanctuaries across the country. Data in **Table IV-1** summarize the operations of these visitor centers, including location, seasonality, hours, estimated annual attendance, admission fee where applicable, estimated size in square feet, whether or not there is retail on-site, and key on-site partners.

**Table IV-1
NOAA Sanctuary Visitor Center Operations**

Name	NOAA Sanctuary	Location	Seasons of Operation	Hours	Attendance	Admission Fee	Size in SF	Retail	On-Site Partners
Olympic Coast Discovery Center	Olympic Coast National Marine Sanctuary	The Landing Mill 115 E Railroad Ave #301 Port Angeles, WA 98362	Seasonal (Mid May through Mid October)	Memorial Day - Labor Day; Open daily, 10 a.m. - 5 p.m. Fall Hours: 10 a.m. - 5 p.m. Saturday & Sunday Wednesday - Sunday, 10 a.m. - 4 p.m.	Not Available	Free	800	Unknown	Many (See Expanded Profile)
Farallones National Marine Sanctuary Visitor Center	Greater Farallones National Marine Sanctuary	991 Marine Dr, San Francisco, CA 94129	Year Round	Wednesday - Sunday, 10 a.m. - 4 p.m.	Not Available	Free	Not Available	Unknown	Many (See Expanded Profile)
Monterey Bay Sanctuary Exploration Center	Monterey Bay National Marine Sanctuary	35 Pacific Ave, Santa Cruz, CA 95060	Year Round	Wednesday - Sunday, 10 a.m. - 5 p.m.	150,000	Free	12,000	Yes	City of Santa Cruz, National Marine Sanctuary Foundation
Coastal Discovery Center at Hearst Memorial Beach	Monterey Bay National Marine Sanctuary	CA-1 & 3rd St/ Simon Rd, San Simeon, CA 93452	Year Round	Friday - Sunday, 11 a.m. - 5 p.m.	80,000	Free	2,000	Unknown	California State Parks
Florida Keys Eco-Discovery Center	Florida Keys National Marine Sanctuary	33 E Quay Rd, Key West, FL 33040	Year Round	Tuesday through Saturday, 9 a.m. - 4 p.m.	Not Available	Free	6,000	Yes	Moore Marine Laboratory; Everglades National Park; Dry Tortugas National Park; National Wildlife Refugees of the Florida Keys
Mekupapapa Discovery Center	Papahānaumokuākea Marine National Monument	76 Kamehameha Ave Hilo, HI 96720	Year Round	Tuesday through Saturday, 9 a.m. - 4 p.m.	60,000	Free	20,000	Unknown	National Marine Sanctuary Foundation
Hawaiian Islands Humpback Whale NMS Visitor Center and Sanctuary Education Center	Hawaiian Island Humpback Whale National Marine Sanctuary	725 S Kihei Rd, Kihei, HI 96753	Limited Hours in Winter	Monday through Friday, 10 a.m. - 3 p.m. Winter (Jan-Mar): Saturdays 10 a.m. to 1 p.m.	Not Available	Free	Not Available	Unknown	Many (See Expanded Profile)
Tauese P.F. Sunia Ocean Center	National Marine Sanctuary of American Samoa (Formerly Fagatele Bay National Marine Sanctuary)	Ulelei Beach, Route 1, Pago Pago 96799, American Samoa	Year Round	Monday through Friday, 8 a.m. - 4 p.m.; weekends (when a cruise ship is in town), 8 a.m. - 2 p.m.	12,000	Free	6,000	Yes	Many (See Expanded Profile)
Great Lakes Maritime Heritage Center	Thunder Bay National Marine Sanctuary	500 W. Fletcher Alpena, Michigan 49707	Limited Hours in Winter	Summer - Open daily, 9 a.m. - 5 p.m. (open until 7 p.m. in July & August); Winter - Monday through Saturday, 10 a.m. - 5 p.m.	94,014	Free	9,000	Yes	Many (See Expanded Profile)
USS Monitor Center and Foundation at the Mariners' Museum and Park	Monitor National Marine Sanctuary	Monitor National Marine Sanctuary 100 Museum Drive Newport News, VA 23606	Year Round	Monday through Saturday, 9 a.m. - 5 p.m.; Sunday, 11 a.m. - 5 p.m.	69,732	Adults: \$13.95 Military and Seniors: \$12.95 Children (4-12): \$8.95	Not Available	Yes	Warner's Museum and Park

Source: NOAA, Facilities Listed

Data and information in the table show that it is fairly common for visitor centers to operate on a somewhat seasonal schedule. Admission is typically free, but earned revenue opportunities exist on-site through retail. On-site partners can be helpful in designating a facility and operating it – specifically at the USS Monitor Center, where visitors can access exhibits only by paying admission to the USS Mariner’s Museum and Park. Despite the fact that many of the visitor centers are in remote locations, they achieve fairly high levels of attendance. This suggests that, especially in an area of high tourism traffic like downtown Provincetown, a Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center could be a very well-visited outreach facility.

Stellwagen Bank NMS Exhibit Summary

In 2015, the staff at Gerry E. Studds Stellwagen Bank National Marine Sanctuary compiled a report to summarize its interpretive activities and exhibits across the New England Area. Stellwagen Bank currently manages sixteen interpretive exhibits between Maine, New Hampshire, Massachusetts, and Connecticut, of which 14 are currently active. Exhibits include static signage, traveling exhibits, NOAA and Stellwagen-specific interactive touch-screen kiosks, and Fathom That! an interactive cell phone tour and mobile website.

Exhibits

The following are exhibits that Stellwagen Bank has installed around New England:

- ◆ **New England Aquarium (Boston, MA):** This permanent Gulf of Maine exhibit was initially installed in 2005 and was updated in 2014. The exhibit features live animal exhibits, video, and interpretive panels, showing the marine life of the Gulf of Maine and exploring how it connects to the larger ecosystem. The exhibit has a special emphasis on the Stellwagen Bank sanctuary represented by a tank showing a boulder reef. The project cost \$15,000 and was designed, fabricated, and installed by the New England Aquarium. The New England Aquarium has attendance of approximately 1.3 million visitors annually.
- ◆ **Maritime Gloucester Interactive Tour (Gloucester, MA):** This permanent exhibit at Maritime Gloucester in Massachusetts was installed in 2006 as a temporary exhibit with static signs, but has since been updated to include several interactive touch screen kiosks, several looping video screens, and interpretive signage, and a seafloor topographic map, offering a virtual tour of the Marine Sanctuary without going out to

the water. Maritime Gloucester is a seasonally operating museum that can be opened in winter for school groups by appointment. Annual attendance is estimated at 62,000.

- ◆ **Scituate Maritime and Irish Mossing Museum (Scituate, MA):** This permanent exhibit was first installed in 2004 and updated in 2008. The exhibit features information on shipwrecks in the Stellwagen Bank NMS, including details about the wreck of the steamship Portland, artifacts from which are in the museum's collection. Key features of the exhibit include photos and newspaper articles about the Portland, as well as a model of and artifacts from the ship.
- ◆ **Seacoast Science Center (Rye, NH):** This permanent exhibit is a static display with a touch screen describing sanctuary research on endangered whales, an exhibit about Tofu, a humpback whale killed in a ship strike, and profiles of sanctuary researchers working with humpback and right whales. The exhibit was installed in 2013 and developed in partnership with the Northeast Regional Association of Coastal and Ocean Observing Systems and the New England Ocean Science Education Collaborative.
- ◆ **Provincetown MacMillan Wharf Kiosk (Provincetown, MA):** This exhibit was first installed in 2012, replacing an older informational kiosk first installed in the mid-1990s. The exhibit features a four-sided kiosk with images and supporting text about the sanctuary, including highlights of its resources, such as whales, fish, seabirds, marine mammal research, and whale watching. Key features include the history of whale watching on the East Coast. The project cost was \$5,000, with exhibit design and installation conducted in-house by the Office of National Marine Sanctuaries and fabrication by Pannier Graphics.
- ◆ **NOAA Northeast Fisheries Science Center at Woods Hole Science Aquarium (Woods Hole, MA):** This permanent static display was installed in 2013 to replace panels similar to those found on Provincetown's MacMillan Wharf first installed in the mid-1990s. The aquarium exhibit now features several live animal tanks featuring marine life found within the sanctuary, as well as interpretive panels and an acoustic recording unit used to map the soundscape of the sanctuary. The Woods Hole Science Aquarium has annual attendance of about 80,000.
- ◆ **Animals without Passports Exhibit (Various Locations):** This temporary exhibit was first installed as a prototype at the Cape Cod Museum of Natural History in Brewster, MA in 2012, and has also been featured in a number of other museums and educational institutions around the region between 2013 and 2016. It is currently on display at the Maritime Aquarium at Norwalk in Norwalk, CT. The exhibit features several static panels exploring the ecosystem and migratory patterns around Humpback whales. The project cost was \$95,000.
- ◆ **NOAA Office of National Marine Sanctuaries / Gerry E. Studds Stellwagen Bank National Marine Sanctuary Interactive Kiosk at Bass Pro Shops (Foxborough, MA):** This is a temporary traveling interactive touch screen kiosk located in the

140,000 square foot Bass Pro Shops in Patriot Place. This retail outlet attracts an estimated 1.2 million visitors annually. The kiosk content includes an overview of sanctuary research, educational outreach programs, tourism opportunities, and real-time weather.

- ◆ **“Where Are They Now?” Kiosks (Bath, Searsport, ME):** This permanent video display kiosk highlighting Stellwagen Bank Sanctuary’s maritime heritage connection to Maine through shipwrecks. Underwater images of the steamship Portland and the schooner Paul Palmer are highlighted in the kiosk. The kiosks are installed in the Maine Maritime Museum and the Penobscot Maritime Museum, which have annual attendance of about 50,000 and 20,000 visitors, respectively.
- ◆ **Fathom That! (Various Locations):** This is a temporary or permanent exhibit that can be replicated at numerous locations. The exhibit includes semi-permanent signage that provide call-in information for a recorded message virtual museum – a series of 42 recorded messages that describe sanctuary news, information about the regional food-web and other stories about whale behavior. Visuals can be accessed on a mobile website through QR codes. The exhibit was produced in partnership with the International Fund for Animal Welfare.
- ◆ **K-12 Marine Art Contest Traveling Exhibit (Various Locations):** This exhibit is a series of static display panels have been rotated around various venues in New England. The exhibit includes winning art pieces from the annual K-12 marine art contest.

Inactive exhibits include:

- ◆ **Halibut Point State Park AIS Exhibit (Rockport, MA):** This permanent exhibit was installed in 2010 and features descriptions of the Stellwagen Bank NMS Automated Identification System (AIS). The exhibit includes an AIS monitor that shows a live feed of vessel traffic in Massachusetts Bay. The park visitor center, where the exhibit was installed, was deemed unsafe due to mold and closed as of August 2015.
- ◆ **Cape Cod National Seashore Province Lands Visitor Center (Provincetown, MA):** This permanent exhibit was installed in 2010 and features descriptions of the Stellwagen Bank NMS Automated Identification System (AIS). The exhibit includes an AIS monitor that shows a live feed of vessel traffic in Massachusetts Bay. As of September 2015, the exhibit was temporarily relocated and not accessible to the public.

Past Exhibits include:

- ◆ **Charles W. Morgan’s 38th Voyage (Various Locations):** After Mystic Seaport restored the Charles W. Morgan whaling vessel, the ship made a tour around New England ports to interpret the region’s whaling history and its impact today. Stops

included New London, CT, Boston, MA, Provincetown, MA, New Bedford, MA, Buzzards Bay, MA, and Vineyard Haven, MA.

- ◆ **S.S. Portland Shipwreck Exhibit (Various Locations):** An early exhibit about Stellwagen Bank shipwrecks included both temporary exhibits at the Cape Cod and Maine Maritime Museums, as well as online exhibits.
- ◆ **Provincetown Visitor Center (Provincetown, MA):** A temporary exhibit of static display panels and interactives were installed in 2001 in the Center for Coastal Studies Office and in 2005 in the Whaler's Wharf on Commercial Street in Provincetown. The exhibits included a description of the Sanctuary's research initiatives.
- ◆ **Photo Exhibit on Humpback Whales (Norwell, MA):** This temporary exhibit of photos of Humpback Whales was on display at the South Shore Natural Science Center in Norwell, MA.
- ◆ **Traveling Photo Exhibit "Creatures of the Bank" (Various Locations):** This exhibit featured photos of the wildlife within the Stellwagen Bank sanctuary, describing the biodiversity found there. Between 1996 and 2000, the exhibit was on display in a number of locations around New England, as well as on Capitol Hill to celebrate Gerry E. Studds' retirement.
- ◆ **Independence Mall Photo Exhibit (Kingston, MA):** This photo exhibition was on display from 1998 to 2000, featuring photos of the sanctuary in unrented storefront windows.

Summary

The Office of National Marine Sanctuaries, a branch of NOAA, is the trustee for over 170,000 square miles of marine waters in the United States. The purpose of these sanctuaries is to protect areas of the marine environment with national significance for their conservation, recreational, ecological, historical, scientific, cultural, archeological, educational or esthetic qualities. Sanctuaries each have their own management plan that outlines management and operational activities, as well as educational and interpretive initiatives that may be sanctuary-specific or system-wide. Visitor Information Centers and educational facilities are part of the public outreach programming in existing NOAA National Marine Sanctuaries. These visitor information centers offer interpretive exhibits and educational programming for visitors, in partnership with other area conservation and education organizations. Admission is typically free, but earned revenues are typically met through retail operations to supplement institutional and gift and grant revenue sources.

Section V
ATTENDANCE POTENTIAL

Following is an assessment of the attendance potential for the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center (VIC) in Provincetown, Massachusetts.

Visitation Potential

The VIC has the potential to draw from both resident and tourist markets. A repeat attendance pattern locally can be developed, but most visitors will likely be tourists to Provincetown. Data in **Table VI-1** provide a summary of the derivation of the attendance potential estimate for the VIC, based on the data and analyses contained in this report. This analysis may require refinement as the project moves into later programming, design, and implementation phases.

Table V-1
Preliminary Attendance Potential Estimate
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center

Market Segment	2021 Population Projection	Market Capture Rates		Visitation Range			Percent of Total Mid- Range Attendance	
		Low Market Capture	High Market Capture	Low Range Visitation	Mid-Range Visitation	High Range Visitation		
Primary and Secondary Resident Market								
Primary Market Area	14,517	15.0%	30.0%	2,178	3,266	4,355	1.3%	
Secondary Market Area	214,778	2.0%	4.0%	4,296	6,443	8,591	2.5%	
Subtotal Resident Market	229,295	2.8%	5.6%	6,473	9,710	12,946	3.7%	
Range in Travel Market Attendance From Mid-Range								
Tourist Market ^{1/}					Travel Market			
		Range below Mid-Range	Range above Mid-Range					
		-20.0%	20.0%	200,000	250,000	300,000	96.3%	
Total Stabilized Attendance Range				206,473	259,710	312,946	100.0%	
Mid Range Attendance ^{1/}				206,000	260,000	313,000		

^{1/} Tourist market includes travelers from the Boston Metropolitan Statistical Area who visit Provincetown as seasonal residents or as tourists.

^{2/} Rounded to nearest 1,000.

Source: ConsultEcon, Inc.

Primary and Secondary Resident Market Potential

The estimate of attendance potential at the VIC among the resident market area has been prepared in part through a “gravity model” analytical approach. That is, the propensity to visit the VIC is strongest among people who reside the closest – residents of the Outer Cape, with additional support from residents of the remainder of Barnstable County. Most of these VIC uses will be due to programs and events as well as occasional use of the exhibits and amenities themselves. Average annual market capture rates of 3 to 6 percent of the resident market are estimated with the Primary Market Area have a higher usage rate but of course a smaller population than the Secondary Market Area of the remainder of the Cape. Based on these factors, Primary and Secondary Market Area annual usage of the VIC is estimated at 6,000 to 13,000 with a mid-range of 10,000 visitors in a stable year of operation. (This does not include people residing in the populous Tertiary Market Area) who are accounted for in the tourist market attendance potential analysis.

Tourist Market Potential

Tourists will constitute the vast majority of VIC visitors. This will include visitors to Provincetown participating in an associated activity such as whale watching, fishing or boating; those who have just arrived via ferry past Stellwagen Bank; and, seasonal residents of Cape Cod and other tourists who are having a vacation day in Provincetown. The estimated total visitation from these sectors of tourists is based on estimated percentage capture rates of attendance to Whale Watch tours³, the Provincetown Ferry⁴ and the tourist population⁵ in Provincetown during the high season and during the shoulder and off seasons. The estimated capture rates are:

³ Industry sources indicate an estimated 250,000 to 300,000 people go whale watching out of Provincetown annually. That number has been discounted by 25% for the purposes of this report to 200,000 annually.

⁴ There are an estimated 130,000 arriving passengers annually.

⁵ In July and August, there are reported to be 35,000 to 60,000 people in Provincetown on a daily basis depending on events, holidays and weather, with other times of the year having lower numbers of people. The average estimated number by season (Summer, shoulder and off-season have been discounted by the numbers of whale watchers and ferry passengers).

Whale Watch	15 to 25 Percent
Provincetown Ferry	10 to 15 Percent
Other non-local in-town population	5 to 10 Percent

Based on these factors, the mid-range tourist stable year visitation potential is estimated at about 250,000 with a range of 200,000 to 300,000 annual visitors.

As additional comparisons this is below the average for visitor attendance to the Province Lands and Salt Pond visitors' centers, operated by the Cape Cod National Seashore; and more than double the attendance to the Pilgrim Monument. The low-range for the tourist market is estimated at 20 percent less than the mid-range visitation, while the high-range for the tourist market is estimated at 20 percent more than the mid-range.

Total Attendance Potential

An attendance potential range has been established for total stabilized year attendance including resident and tourist visitation. Stabilized attendance levels are typically achieved in the third year after opening. Attendance potential at the VIC in a stable year is estimated at 206,000 to 313,000, with a mid-range "planning factor" of 260,000.

Attendance by Type

The resident market area visitors would be made up of both general visitors to the VIC, attendees on school or general group visits, and special event attendees, including environmental and community events, as well as general facility rentals. Tourists would be for the most part general visitors already interested in the topic (such as those on whale watches) or people who would want to learn more about the area's marine environment. Data in **Table V-2** summarize the audience distribution and profile assumptions, describing a typical distribution of events and programs at the VIC. Walk-in attendance, mostly tourists, are estimated to make up the bulk of attendances, at about 96 percent of the total visitation in the mid-range scenario.

**Table V-2
 Audience Distribution and Profile Assumptions
 Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

<u>Attendance Type in Mid-Range Scenario</u>		<u>Notes</u>
Walk in Attendance		
Baseline of Walk-In Attendance	<u>250,000</u>	Free admission
Group Tours		Largely whale watch groups
High Season		
Number Weeks	12	
Tours Per Week	14	
Number of tours	168	
Persons Per Tour	<u>25</u>	
Number of participants	4,200	
Shoulder Season		
Number Weeks	16	
Tours Per Week	4	
Number of tours	64	
Persons Per Tour	<u>30</u>	
Number of participants	<u>1,920</u>	
Total Group Tours	232	These are assumed to have a fee
Total Group Participants	6,120	
Education Groups		Largely from Barnstable County
Number of Groups	50	
Persons per Group	<u>30</u>	
Number of participants	1,500	
Environmental Events		Sponsored by Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center
Number of events per month	1	
Total Events	12	
Persons per Event	<u>50</u>	
Number of participants	600	These likely will not have a fee
Community Events (e.g. film festival)		Largely sponsored by Lower Cape organizations
Number of events per month	2	
Total Events	24	
Persons per Event	<u>50</u>	
Number of participants	1,200	These will have a fee
Facility Rentals		Largely from Lower Cape
Number of Facility rentals per month	1	
Total Facility Rentals	12	
Persons per Event	<u>50</u>	
Number of Facility Rental Participants	600	These will have a fee
Sum Local Use	<u>3,900</u>	Total Estimated Education Groups, Facility Rentals, Environmental Events, Community Events

Source: ConsultEcon, Inc.

Visitor Interpretive centers typically skew heavily, if not completely, toward attendance by spontaneous visitors. Data in **Table V-3** offer a summary of attendance by type to the VIC.

Table V-3
Admissions Analysis and Attendance by Type
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

Visitor Type	% to Total Attendance	Attendance By Type
Walk in	96.1%	249,980
Group Tours	2.4%	6,120
School Group Attendance	0.6%	1,500
Sponsored Environmental Programs	0.2%	600
Community Events	0.5%	1,200
Facility Rentals	0.2%	600
Total	100%	260,000

Source: ConsultEcon, Inc.

The range in the estimate of attendance will vary due to the following factors:

- ◆ The location and characteristics of the site selected for the VIC;
- ◆ How well future visitor experience concepts for the project are translated into the visitor experience;
- ◆ The extent of special events and exhibits;
- ◆ The extent to which substantial visitor information offerings are developed;
- ◆ Quality of operations;
- ◆ Success of membership development efforts;
- ◆ The amount and quality of marketing employed (including pre-opening marketing);
- ◆ Extent of cross programming with the National Marine Sanctuary and Center for Coastal Studies;
- ◆ Variations in seasonal weather patterns that could affect general visitation to Provincetown as a whole;
- ◆ Changes in the economic environment generally; and,
- ◆ The variation in market acceptance of the project that may occur.

Five-Year Attendance Patterns

During the first few years after opening, the project would be expected to achieve slightly higher attendance based on local excitement about the new facility. An attendance of 4 percent above stabilized attendance for the VIC would be anticipated during the first year of full operation. Attendance would then be expected to decline to a stabilized attendance level in the third year. Data in **Table V-4** provide estimated five-year attendance potential in the low-, mid-, and high-range attendance scenarios.

Table V-4
Five-Year Attendance Potential Pattern
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center	Stable Year	YEAR 1	YEAR 2	YEAR 3 ^{1/}	YEAR 4	YEAR 5
Percentage Difference From Stabilized Attendance						
Percent of Stabilized Year Attendance		104%	102%	100%	100.5%	101%
Projected Stabilized Annual Attendance						
Low-Range Attendance Potential	206,000	214,240	210,120	206,000	207,030	208,060
Mid-Range Attendance Potential	260,000	270,400	265,200	260,000	261,300	262,600
High-Range Attendance Potential	313,000	325,520	319,260	313,000	314,565	316,130

^{1/} Year 3 is considered to be the first stable year of operations after opening year excitement and ramp-up.
 Source: ConsultEcon, Inc.

Data in **Table V-5** summarize the distribution of attendance by type over the same five-year period. It is estimated that the distribution of attendance would not vary year to year. Instead, the distribution would remain, and increases in early years would be reflected by the early year “bump.”

**Table V-5
 Five-Year Attendance Potential by Type
 Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

% to Total Attendance	Year 1	Year 2	Year 3	Year 4	Year 5
Audience Distribution					
Walk in	96.1%	96.1%	96.1%	96.1%	96.1%
Group Tours	2.4%	2.4%	2.4%	2.4%	2.4%
School Group Attendance	0.6%	0.6%	0.6%	0.6%	0.6%
Sponsored Environmental Events	0.2%	0.2%	0.2%	0.2%	0.2%
Community Events	0.5%	0.5%	0.5%	0.5%	0.5%
Facility Rentals	0.2%	0.2%	0.2%	0.2%	0.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Attendance By Type					
Walk in	259,979	254,980	249,980	251,230	252,480
Group Tours	6,365	6,242	6,120	6,151	6,181
School Group Attendance	1,560	1,530	1,500	1,508	1,515
Sponsored Environmental Events	624	612	600	603	606
Community Events	1,248	1,224	1,200	1,206	1,212
Facility Rentals	624	612	600	603	606
Total	270,400	265,200	260,000	261,300	262,600
Number of paid Events					
Community Events	24	24	24	24	24
Facility Rentals	12	12	12	12	12

Source: ConsultEcon, Inc.

Attendance Seasonality

An important factor in facility planning is seasonality of visitation. Activity on Cape Cod is highly seasonal, as it is a summer destination for not only New England residents, but visitors from around the world. Data in **Table V-6** provides a summary of stabilized year attendance

by month. Seasonality is based on typical attendance patterns for facilities of this type and the local experience – in this case, the seasonality is based on the average attendance by month at the Cape Cod National Seashore for the years 2013 through 2015. Local tourism visitation shows a peak of visitation in July and August, at 26 percent. This peak month, therefore, is estimated to have about 81,000 attendees, at the mid-range attendance. It is noted that the VIC is expected to have a seasonal operation, such that the facility will be fully open for 9 months of the year. For the three winter months, the facility will be open only for special events and community use.

Table V-6
Monthly Attendance Distribution
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

	<u>Low Attendance Scenario</u>		<u>Mid-Range Attendance</u>		<u>High Attendance Scenario</u>	
	Projected Seasonality	Total Attendance	Projected Seasonality	Total Attendance	Projected Seasonality	Total Attendance
January	1%	2,060	1%	2,600	1%	3,130
February	1%	2,060	1%	2,600	1%	3,130
March	1%	2,060	1%	2,600	1%	3,130
April	3%	6,180	3%	7,800	3%	9,390
May	6%	12,360	6%	15,600	6%	18,780
June	12%	24,720	12%	31,200	12%	37,560
July	26%	53,560	26%	67,600	26%	81,380
August	26%	53,560	26%	67,600	26%	81,380
September	10%	20,600	10%	26,000	10%	31,300
October	7%	14,420	7%	18,200	7%	21,910
November	4%	8,827	4%	11,141	4%	13,412
December	3%	6,133	3%	7,741	3%	9,318
Total	100%	206,000	100%	260,000	100%	313,000

NOTE: The seasonality for the Stellwagen bank NMS Visitor Interpretive Center is based on the average of the seasonality of attendance at the Cape Cod National Seashore for the years 2013 to 2015. In this operating scenario, January through March attendance is assumed to be local use for community events and rentals.

Peak Facility In-Building Population

The information provided by data in **Table V-7** uses the estimated stabilized mid-range attendance potential to prepare estimates of peak attendance days and a preliminary review of required VIC size. Given this context, a facility in-house population analysis has been prepared that uses the estimate of the attendance during the peak month at 26 percent, a high week during that period (estimated 25% of monthly attendance) and a strong day in that week (20% of weekly attendance, most likely a Saturday) to arrive at an appropriate “design day” attendance level for the VIC. A factor of peak in-facility population of 6.7 to 8.3 percent of that day’s total attendance is then estimated, based on an assumed average length of stay of 20 to 25 minutes. These factors provide an estimate of the “in-house” population that is useful for facility sizing and throughput analysis. At peak periods, the facility would have an estimated 225 to 339 visitors in-house under a mid-range attendance scenario. This “instantaneous peak hour” is the time when the museum would be busiest, and would, therefore, have the highest number of people in-house at one time. The preliminary proposed scale of the VIC at 9,300 square feet would accommodate visitation at this level.

**Table V-7
 Peak On-Site Population Facility Sizing Requirements
 Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

	<u>Mid-Range Attendance</u>	<u>High-Range Attendance</u>
Annual Visitation	260,000	313,000
Peak Month (August)	67,600	81,380
High Week 25% of Peak Month	16,900	20,345
Peak Day 20% of High Week	3,380	4,069
Average Length of Stay		
<i>Peak in-house population</i>	In House ^{1/}	In House ^{1/}
Mid-Range Length of Stay (In Visitor Center)	(20 min. stay) 225	(25 min. stay - 8%) 339
Circulation Space Sizing	(20 sq.ft./attende	(20 sq.ft./attende
	4,507 SF	6,782 SF
Facility Sizing	1.2 Times	1.2 Times
	5,408 SF	8,138 SF

^{1/} Based on peak hour arrival of 20% of total daily attendance
 Source: ConsultEcon, Inc.

Summary

The proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center in Provincetown has substantial attendance potential for both the resident and tourist markets in Provincetown. An attendance potential range has been established for total stabilized attendance projected to be achieved in the third year after opening. Annual attendance potential at the VIC in a stable year (Year 3) is estimated at 206,000 to 313,000, with a mid-range “planning factor” of 260,000.

During the first few years after opening, the project would be expected to achieve somewhat higher attendance based on local excitement about the facility. A highly seasonal attendance pattern is expected, with a substantial peak during the summer months. Estimates of peak

attendance days at the proposed VIC were prepared. At peak periods, the facility would have an estimated 225 to 339 visitors in-house under a mid-range attendance scenario. The preliminary proposed scale of Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown of 9,300 square feet would accommodate visitation at this level.

Section VI

OPERATING PLAN

This section provides a summary of operations at the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center (VIC), including an analysis of user fees and sources of revenue, a personnel schedule, and other expenses.

Operating Revenues

Because admission fees will not be charged to visitors to the VIC, earned revenues of the VIC will be derived from fees to tour and school groups, fees for community and educational events, facility rental fees, and retail at the facility. In addition, there will be a need for targeted contributed revenue and in-kind support to fully fund ongoing operations. This need for both earned and supportive revenue is universal for visitor and interpretive centers. Following is a review of the earned revenue potential of the proposed VIC.

Operating Assumptions

Data in **Table VI-1** provide a range of operating and revenue assumptions for the operating and financial analysis. These assumptions form the basis for the revenue potential for the VIC. In general, they are informed by the experience of comparable visitor information center facilities nationally and regionally and also the several NOAA Marine Sanctuary visitor information centers.

**Table VI-1
 Operations Analysis Assumptions in Current Dollars
 Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

General	
Owner	TBD
Principal Operator	NOAA Stellwagen Bank
Operating Partner	Center for Coastal Studies
Operating Partner	Provincetown
Number of Months Visitor Center Open Annually	9
	<i>During off season lobby and multi purpose space will be available for community use.</i>
Mid Range Gross SF Building Area	9,300
Mid-Range Attendance	260,000
Inflation	1.5%
Annual Attendance Growth After Stabilized Year	0.5%
Average Fees Per Capita	
Group Tours	\$3.00 Per attendee, includes a presentation
School Group Fees	\$2.00 Per attendee, includes a presentation
Environmental Events	\$6.00 Per attendee
Average Fees Per Event	
Community Event fees	\$150 Per event
Facility Rental fees	\$400 Per event
Retail	
Percent of visitors making purchases	20%
Average Sale	\$8.00
Per Capita Retail Sales	\$1.60
Cost of Goods Sold as a % of Retail Sales	52%

Source: ConsultEcon, Inc.

Revenue Potential Summary

Data in **Table VI-2** present a five-year estimate of revenue potential, based on the attendance potential, ticket pricing, membership, and other revenue assumptions. The initial years of operation benefit from slightly higher attendance levels than is expected in the stable year. The first year estimate is in current dollars, with future years assuming a 1.5 percent annual inflation rate. The actual dollar amounts for Year 1 and subsequent years will depend on future rates of inflation, project performance, and the number of years the project takes to

develop before opening. The stable Year 3 Total Earned Revenue potential for the proposed VIC is estimated to be \$250,000 in current dollars based on the findings and assumptions of this report.

Table VI-2
Earned Revenue Potential
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

Earned Revenue	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	Stable Year in Current Dollars	Percent to Total
Attendance	270,400	265,200	260,000	261,300	262,600	260,000	
Group Tours	\$19,094	\$19,008	\$18,915	\$19,295	\$19,682	\$18,360	7.4%
School Group Revenue	3,120	3,106	3,091	3,153	3,216	3,000	1.2%
Environmental Events	3,744	3,727	3,709	3,783	3,859	3,600	1.4%
Community Events	3,600	3,654	3,709	3,764	3,821	3,600	1.4%
Facility Rentals	4,800	4,872	4,945	5,019	5,095	4,800	1.9%
Total Attendance Revenue	\$34,358	\$34,367	\$34,368	\$35,014	\$35,672	\$33,360	13.4%
Retail Net of CoGS	\$224,973	\$223,956	\$222,858	\$227,332	\$231,890	216,320	86.6%
Total Earned Revenue	\$259,331	\$258,323	\$257,227	\$262,346	\$267,562	\$249,680	100.0%

Source: ConsultEcon, Inc.

Note: CoGS is Cost of Goods Sold

OPERATING AND MANAGEMENT PROFILE

The estimated operating expense estimates for the proposed VIC were prepared to reflect the facility program and the experience of other comparable visitor information centers. The expenses reflect a tightly operated project with a “bottom line” orientation. Inputs to the operating expenses analyses include the experience of comparable facilities and the proposed “metrics” of the facility – its size, program and attendance potential. It should be noted, however, that each comparable facility has its unique characteristics, programs and operating procedures – the experience of other comparable facilities should be regarded as a guide for planning only. Increasingly detailed operating expense plans can be made in subsequent planning, design and construction phases.

Personnel

Personnel are a key component to operating any visitor-oriented facility. The proposed program for the VIC indicates a need for 2.5 full-time and 6 part-time positions as shown by data in **Table VI-3**. The estimated salary budget for the personnel is approximately \$260,000 in current dollars with an estimated average taxes and fringe of 24 percent of total salaries in addition. The salaries assumed in this analysis are prototypical for the industry and are not meant to set the compensation for a particular position. Overall, they are indicative of the salaries that should be anticipated for the visitor center, based on its location and operating budget. Paid staff positions would be supplemented by volunteers, who would have interpretive duties as well as assisting with education, visitor services and other functions. The number of volunteers and their specific duties will be based on availability and further planning. The total estimated payroll for the proposed VIC, based on this staffing profile, is \$342,000 inclusive of overhead, benefits, and additional paid support staff, such as interns and seasonal employees not included in the personnel schedule. Personnel direct salary and fringe benefit costs including seasonal and intern wages are approximately 55.8 percent of Total Facility Operating Expenses.

**Table VI-3
Proposed Personnel Plan in Current Dollars
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Personnel Schedule	Full-Time or Part-Time	Seasonal or Year Round	Annualized Salaries (FTE)	Number of Full Time Equivalent (FTE) Positions	Number of Seasonal Full Time Positions	Total Salary Budget	Function/Duties
Visitor Center Manager	Full-Time	Year Round	\$85,000	1	0	\$85,000	Manage Center, coordinator volunteer program, manage partnerships, new exhibits
Education Coordinator	Part-Time - 50%+ of Time	Year Round	\$60,000	0	1	\$30,000	Administration, contract supervision, train volunteers, support exhibit functions
Special Event Coordinator	Part-Time - 50%+ of Time	Year Round	\$45,000	0	1	\$22,500	Special Event and Program Scheduling
Interpretive Center Desk Staff	Full-Time	2 for 9 months 4 Seasonal	\$35,000	1.5	4.0	\$122,500	Front of House interactions with visitors
Total Salaries						\$260,000	Provides additional staff capacity for special projects, and coverage of V. I. C. during peak periods and events.
Taxes & Fringe Est. at 24% of Salaries						\$62,400	
Total Salaries, Taxes & Fringe						\$322,400	
Additional Personnel Support (Interns, Seasonal)						\$20,000	
Total Personnel						\$342,400	
Total Full Time Equivalent Positions (FTE'S)				2.5	6.0	\$342,400	
				5.5			

Note: This personnel plan assumes that there will be substantial support of operations and visitor information and education activities by volunteers. The number of volunteers and their specific duties will be based on availability and further planning of the extent of information to be offered and the type and extent of education, programming and person-to-person communication that will occur at the Visitor Interpretive Center.

Source: ConsultEcon, Inc.

Non-Personnel Operating Expenses

Data in **Table VI-4** provide a stable year attendance operating expense estimate in current dollars based on detailed factors for individual expense items for the proposed VIC.

Data in **Table VI-5** summarize the estimated operating costs of the proposed VIC for a five-year period. It is important to note that Year 1 of the plan is in current dollars. The actual amounts for Year 1 and subsequent years will depend on future inflation, the number of years before opening and the actual budgets put into place. The estimated operating expenses for the VIC are estimated to be \$593,000 in the stable year in current dollars.

**Table VI-4
Potential Operating Expenses in Current Dollars
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

Project Parameters				
Project Square Footage	9,300			
Annual Attendance	260,000			
School & Group Tour & Sponsored Program Attendance	8,220			
Total Employees (FTE's)	5.50			Percent to Total
Detailed Budgetary Analysis	Annual Amount	Expense Factors		
Personnel Salaries	\$260,000		See Personnel Schedule	43.8%
Taxes and Fringe	62,400		See Personnel Schedule.	10.5%
Additional Personnel Support ^{2/}	20,000		See Personnel Schedule.	3.4%
Professional Services ^{1/}	8,250	@ \$1,500	Per FTE	1.4%
Outside Services ^{2/}	5,500	@ \$1,000	Per FTE	0.9%
Administrative & Operating Costs ^{3/}	16,500	@ \$3,000	Per FTE	2.8%
Printing & Publications ^{4/}	26,000	\$0.10	Per Attendee	4.4%
Marketing / Advertising ^{5/}	39,000	@ \$0.15	Per Attendee	6.6%
Education Programs ^{6/}	8,220	\$1.00	Per Group / Environmental Event Attendee	1.4%
Exhibits ^{7/}	26,000	\$0.10	Per Attendee	4.4%
Supplies ^{8/}	13,000	\$0.05	Per Attendee	2.2%
Utilities ^{9/}	37,200	@ \$4.00	Per Square Foot	6.3%
Insurance ^{9/}	12,090	\$1.30	Per Square Foot	2.0%
Interior and Exterior Operations, Repairs & Maintenance ^{10/}	32,550	\$3.50	Per Square Foot	5.5%
Miscellaneous Operating Expenses ^{11/}	9,300	@ \$1.00	Per Square Foot	1.6%
Subtotal Operating Expenses	\$576,010			97.1%
Capital Reserves/Cyclical Maintenance ^{12/}	\$17,280	@ 3%	of Total Operating Costs	2.9%
Total Operating Expenses	\$593,290			100.0%
Operating Expense Per Project SF	\$63.79			
Operating Expense Per Project Visitor	\$2.28			

^{1/} Professional services include consulting fees, tax preparation and auditing, legal fees, and temporary office services. They are based upon the number of employees to supplement their work and skills.

^{2/} Outside services may include equipment maintenance contracts, security monitoring contracts, exhibit maintenance contracts / costs.

^{3/} Administration includes: Postage/Shipping, Telephone, Dues & Subscriptions, Travel & Professional Development, consumable items such as office supplies, maintenance supplies, staff kitchen/ lounge supplies and paper products, volunteer gifts and annual event etc.

^{4/} Includes brochures, rack cards, supplementary documentation, tabloids, etc.

^{5/} Funding related to inclusion in Cape Cod tourism channels, outreach at festivals and other events, maintenance of website, etc.

^{6/} Direct costs related to preparing and presenting programs at Interpretive Center.

^{7/} Funding for updating exhibit content and minor repairs and refurbishment of exhibits and for bringing in traveling or changing exhibits.

^{8/} Direct costs of paper products, hand soap and other supplies related to public washrooms and the visitor center.

^{9/} Assumes approximately 9 months full time operation and in addition 3 months in which the lobby and multi-purpose room are available for community use.

^{10/} Janitorial services, snow clearing, regular maintenance of interior and exterior spaces, minor repairs and replacement. Major repairs and replacement are not included in the regular operating budget, but would be funded through Capital Reserves/Cyclical Maintenance budgets.

^{11/} Funds for other non-itemized expenses and unexpected requirements in one or more of the expense categories

^{12/} Capital Reserves include funds for equipment replacement and minor capital expenditures for building repairs or upgrades.

Source: ConsultEcon, Inc.

Table VI-5
Estimated Operating Expenses over Five-Year Period
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown

Operating Expenses	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	Stable Year in Current Dollars	Percent to Total
Attendance	270,400	265,200	260,000	261,300	262,600	260,000	
Personnel	\$342,400	\$347,536	\$352,749	\$358,040	\$363,411	\$342,400	57.7%
Administrative	30,250	30,704	31,164	31,632	32,106	30,250	5.1%
Communications	67,600	67,295	66,965	68,309	69,679	65,000	11.0%
Programs and Exhibits	35,589	35,428	35,254	35,962	36,683	34,220	5.8%
Facility Operations	104,660	105,966	107,288	108,965	110,668	104,140	17.6%
Capital Reserves/ Cyclical Maintenance	17,280	17,540	17,803	18,070	18,341	17,280	2.9%
Total Operating Costs	\$597,779	\$604,468	\$611,222	\$620,978	\$630,888	\$593,290	100.0%

Source: ConsultEcon, Inc.

Project Net Operating Income Potential

Data in **Table VI-6** summarize the detailed net income potential for the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center in the first five years of operations, as well as the stable year in current dollars. The data show that stable year earned revenues represent about 42percent of total needed revenues to support operations in a stable year (including capital reserves). This would be supplemented by contributed revenues and in-kind support. While the VIC has substantial capacity to generate earned revenue. At the same time, this is a complex and labor-intensive operation. The VIC will, and must, be active in generating substantial contributed (non-earned) revenues for the facility. The facility is expected to have ongoing in-kind and funding support from its institutional partners and to also engage in ongoing fundraising including corporate support, as well as philanthropic and supportive gifts. Depending on its governance, it would be very helpful to economic sustainability to establish financial reserves and develop an endowment.

**Table VI-6
Detail Net Income Summary
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown**

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	Stable Year in Current Dollars	Percent to Total
Attendance	270,400	265,200	260,000	261,300	262,600	260,000	
Total Attendance Revenue	\$34,358	\$34,367	\$34,368	\$35,014	\$35,672	\$33,360	5.6%
Retail Net of CoGS	224,973	223,956	222,858	227,332	231,890	216,320	36.5%
Total Earned Revenue	\$259,331	\$258,323	\$257,227	\$262,346	\$267,562	\$249,680	42.1%
Targeted Contributed and In-Kind Support ^{1/}	\$338,448	\$346,145	\$353,996	\$358,631	\$363,326	\$343,610	57.9%
Total Operating Revenue	\$597,779	\$604,468	\$611,222	\$620,978	\$630,888	\$593,290	100.0%
Operating Expenses							
Personnel	\$342,400	\$347,536	\$352,749	\$358,040	\$363,411	\$342,400	57.7%
Operations	133,439	133,426	133,383	135,903	138,468	129,470	21.8%
Facilities	121,940	123,506	125,090	127,035	129,009	121,420	20.5%
Total Operating Costs	\$597,779	\$604,468	\$611,222	\$620,978	\$630,888	\$593,290	100.0%
Net Operating Income	-	-	-	-	-		

^{1/} Assumes that each of the three major partners, NOAA Stellwagen Bank, Center for Coastal Studies and Provincetown will largely cover operating costs through contributed personnel, facility operating costs etc. There are also opportunities for gifts and grants related to the educational and programmatic activities that would occur and be sponsored at the Interpretive Center. A donation box could be located in the lobby with the funds used to defray Interpretive Center education costs and could also be directed to Stellwagen Bank conservation efforts.
Source: ConsultEcon, Inc.

Summary

Based on the analysis in this report, the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center has the potential to operate successfully over time, if the assumptions regarding quality of facility development, operations, ongoing support from its institutional partners and additional fundraising are met. Because admission fees will not be charged to visitors to the VIC, operating revenues of the will be derived from fees for presentations to tour groups and school groups, fees for community and educational events, facility rental fees, and retail at the VIC. In this operating scenario, the proposed VIC earns about 44.8 percent of the revenues needed to support the facility's operating costs. A directed set of fundraising and giving programs will be needed in addition, as well as in-kind and funding support from operating partners. The operating profile of the VIC is similar to many

of the comparable institutions, whose operating strategies have been used in preparing the operating plan. Diversified and creative sources of revenue and sound fiscal management will assist the proposed Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center Provincetown to sustain its operations.

APPENDIX A
POTENTIAL LOCATIONS REVIEWED AND PROJECT CONCEPT
DEVELOPMENT PROCESS

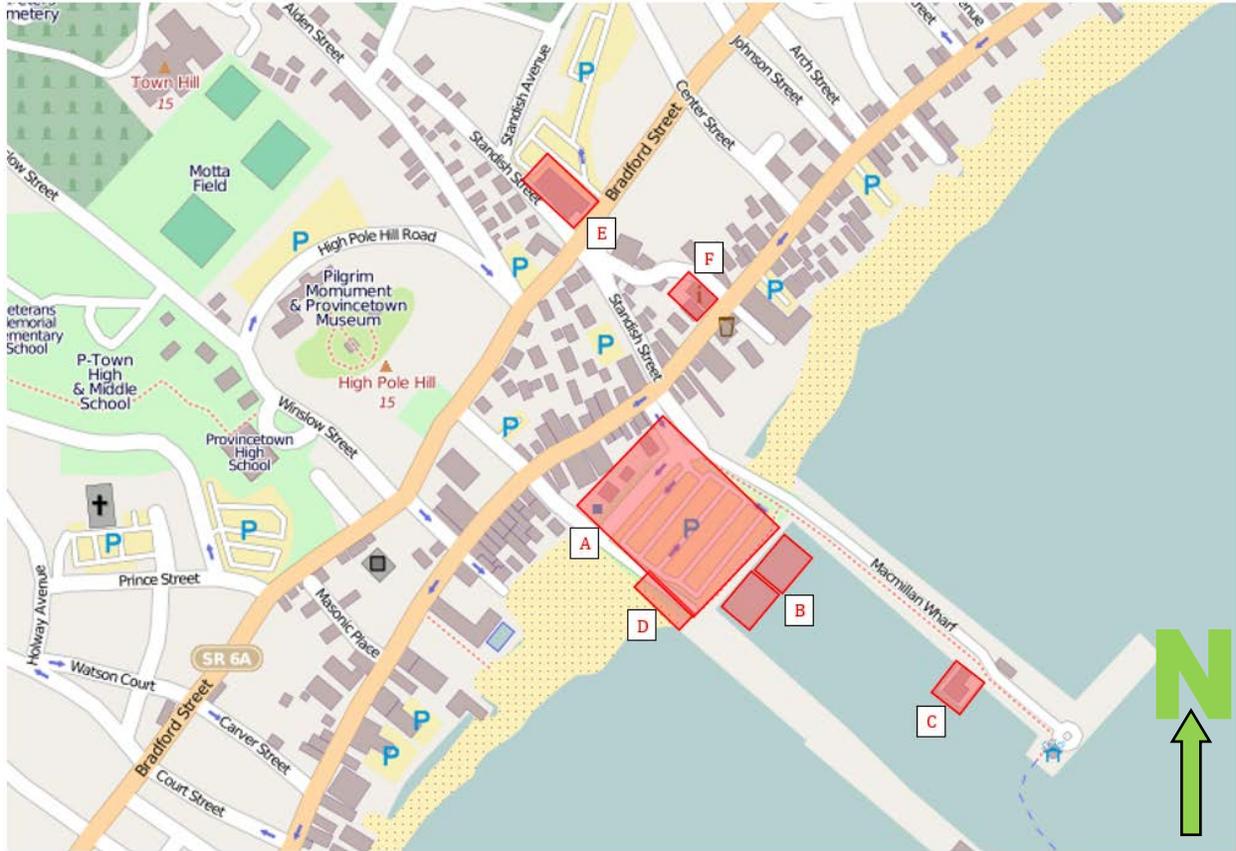
Data in this appendix summarize the site review and selection process, as well as the process of project refinement as conducted by ConsultEcon, Inc. with input of key stakeholder organizations in Provincetown.

Evaluation of Potential Site

Six sites in Downtown Provincetown were identified as potential locations for the proposed Gerry E. Studds Stellwagen Bank National Marine Sanctuary Visitor Interpretive Center.

Figure A-1 is a map showing the locations of the six sites in the context of Provincetown's Downtown. Each of the sites has potential benefits and challenges for the proposed location of a visitor center. Data in **Table A-1** summarize the evaluation of these sites.

Figure A-1
Map of Proposed Sites
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center



Source: Provincetown Visitor Center Task Force; ConsultEcon, Inc.

Table A-1
Site Evaluation
Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center

Site	Benefits	Challenges	Comments
Site A	<ul style="list-style-type: none"> • Visible to both McMillian Pier and commercial wharf, Town parking lot and Commercial street • This location is at the centroid of downtown activity • Accessible by foot, bike, boat, ferry and auto from multiple locations • Adjacent to compatible uses • Multiple locations for Visitor Interpretive Center possible within the overall site • Potential to be co-developed with information and transportation functions • Directly accessible to people using water resources such as ferry, whale watch, fishing etc. • Would have adjacent parking • Utilities available • City owned • Site available now 	<ul style="list-style-type: none"> • Will require reworking of existing parking, circulation and transportation functions • Possible reduction in total number of parking spaces 	<ul style="list-style-type: none"> • There are several locations within the Town parking area that would be favorable for the Gerry E. Studds Stellwagen Bank Visitor Interpretive Center. The optimum location will be based on master planning of the entire area.
Site B	<ul style="list-style-type: none"> • Visible to both McMillian Pier and commercial wharf, Town parking lot and Commercial street • Access via City owned land • Good Accessibility • Would have adjacent parking • • Adjacent to compatible uses • Locations possible near either pier • Site available now 	<ul style="list-style-type: none"> • Is not adjacent to commercial street pedestrian and vehicular traffic. • Would require extensive pilings, and higher construction costs • Would require extensive permitting • Development timeline may be very long • Building over the water is not compatible with conservation ethos of partnership organizations 	<ul style="list-style-type: none"> • The availability of sites on land make building over the water unnecessary.

Table A-1 (Continued)
Site Evaluation Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center

Site	• Benefits	• Challenges	• Comments
Site C	<ul style="list-style-type: none"> • Visible to both McMillian ferry / boat passengers and to people along the waterfront Square and other • Accessibility • Adjacent to compatible uses 	<ul style="list-style-type: none"> • Is not adjacent to commercial street pedestrian and vehicular traffic. • General pedestrians on Commercial Street and nearby will have to walk approximately 1,200 feet to reach the site. • Walking to the site in inclement weather will be unpleasant. • Would not have adjacent parking • This site would have to be acquired, this might take time and will add substantially to project cost. • Retrofitting the building will likely not yield as functional a visitor center as designed to use new construction. • Additional permitting may be necessary. 	<ul style="list-style-type: none"> • This site is too far from concentrations of pedestrians and is not an optimum building for visitor center use. • This site would have lower market opportunity than a site on the waterfront.
Site D	<ul style="list-style-type: none"> • Visible to both McMillian ferry / boat passengers and to Commercial Street Square and other • Good Accessibility • Adjacent to compatible uses • Could be integrated to master planning for waterfront. • Would have adjacent parking 	<ul style="list-style-type: none"> • Is long and narrow, not a favorable shape for a visitor center. • Is not oriented to the main pedestrian path from MacMillan Pier to Commercial Street • Would require acquisition / additional costs 	<ul style="list-style-type: none"> • Inquiries indicate that this site will not be available for purchase in the foreseeable future.
Site E	<ul style="list-style-type: none"> • Possible joint development opportunities. • Site available now 	<ul style="list-style-type: none"> • Does not have connections to the water. • Is not adjacent to commercial street pedestrian and vehicular traffic. • Low pedestrian volumes and low visibility. • Does not engage MacMillan Pier and the waterfront • Would require acquisition / additional costs 	<ul style="list-style-type: none"> • This site would have much lower market opportunity than a site on the waterfront.

Table A-1 (Continued)
Site Evaluation Gerry E. Studds Stellwagen Bank NMS Visitor Interpretive Center

Site	• Benefits	• Challenges	• Comments
Site F	<ul style="list-style-type: none"> • Accessibility • Site available now 	<ul style="list-style-type: none"> • Poor visibility • Does not engage MacMillan Pier and the waterfront • Does not have adjacent parking • Is too small for an impactful visitor center 	<ul style="list-style-type: none"> • This site would have much lower market opportunity than a site on the waterfront.

Source: ConsultEcon, Inc.

Study Process and Study Participants

In addition to preparing the research and analyses contained in this report, ConsultEcon, Inc. conducted 2 on-site workshops and 10 interviews with key stakeholders in Provincetown and the NOAA Office of National Marine Sanctuaries to obtain insights into potential locations; local knowledge of markets, trends and opportunities; potential operating structures; and, desired facility characteristics, desired outcomes of facility development etc.

Following is a list of key stakeholders who were interviewed during the site evaluation and project concept development process:

- ◆ Richard Delaney, Center for Coastal Studies President and CEO
- ◆ Tom Donegan, Provincetown Selectman
- ◆ Anthony Fuccillo, Town of Provincetown Tourism Director
- ◆ David Gardner, Town of Provincetown Assistant Town Manager
- ◆ Ben Haskell, Assistant Superintendent for Stellwagen Bank National Marine Sanctuary
- ◆ Rex McKinsey, Town of Provincetown Harbormaster
- ◆ Gloria McPherson, Town of Provincetown Town Planner
- ◆ Steve Milliken, Dolphin Fleet Whale Watch President
- ◆ David Panagore, Town of Provincetown Town Manager
- ◆ Matt Stout, NOAA Office of National Marine Sanctuaries Chief of Staff
- ◆ Christine Walker, Provincetown Film Festival representative

Gerry E. Studds Stellwagen Bank National Marine Sanctuary Advisory Committee

- ◆ Candice Collins-Boden - Provincetown Chamber of Commerce
- ◆ Richard Delaney - Center for Coastal Studies
- ◆ Tom Donegan - Provincetown
- ◆ David Flattery - Harbor Committee
- ◆ Anthony Fuccillo - Provincetown
- ◆ David Gardner - Provincetown
- ◆ Ben Haskell - NOAA, Stellwagen Bank NMS
- ◆ Deborah Marx - NOAA
- ◆ Gloria McPherson - Provincetown
- ◆ Rex McKinsey - Provincetown
- ◆ Anna Meade -365 Waterfront Committee
- ◆ Steve Milliken - Dolphin Fleet Whale Watch
- ◆ Dennis Minsky - Conservation Commission
- ◆ David Panagore - Provincetown
- ◆ Carlos Verde - Provincetown
- ◆ Matt Stout - NOAA Office of National Marine Sanctuaries
- ◆ Louise Venden365 Waterfront Committee
- ◆ Catherine Macort - Center for Coastal Studies
- ◆ Elizabeth Verde - Provincetown

**APPENDIX B
 PROFILES OF NOAA SANCTUARY INTERPRETIVE FACILITIES AND OUTREACH
 PROGRAMS**

**Table B-1
 Olympic Coast National Marine Sanctuary**

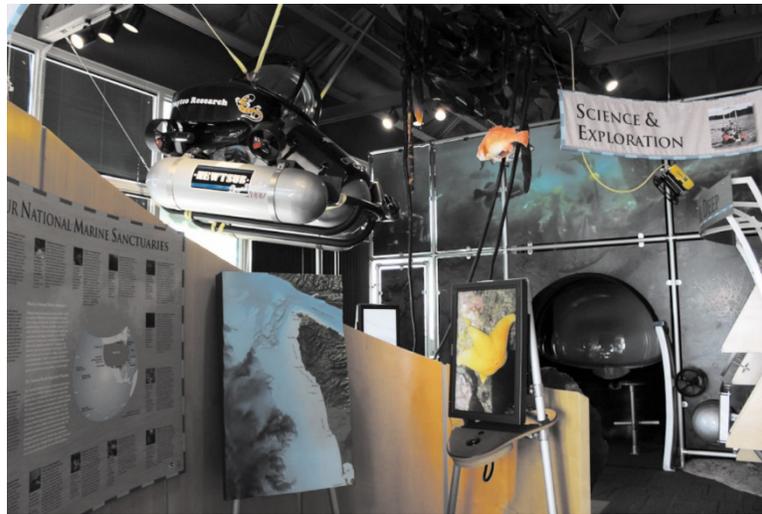
Sanctuary Name	Olympic Coast National Marine Sanctuary
Location / Address	115 East Railroad Ave Suite 301 Port Angeles, WA 98362
Area	2,408 square nautical miles of marine waters off the Olympic Peninsula coastline.
Gateway City	Port Angeles, Westport, Gray's Harbor, WA
Proximate Metro Area Feeder	Seattle-Tacoma, WA
Regional Catchment Area	Seattle-Tacoma Media Market
Region	West Coast
Public Outreach Facility	Olympic Coast Discovery Center The Landing Mall 115 E Railroad Ave #301 Port Angeles, WA 98362
Partner Organizations	<ul style="list-style-type: none"> • Olympic National Park (NPS) • Washington State Parks • Whale Trails (Private Nonprofit) • Port Angeles Public Library • National Network for Ocean and Climate Change Interpretation • Port Angeles and other Public Schools • Feiro Marine Life Center • Seattle Aquarium • Local Native Tribes (including Makah and Suquamish) • Ocean Exploration Trust • Washington CoastSavers • U.S. Coastguard • Pacific Marine Environmental Laboratory
Interpretive Plan	<ul style="list-style-type: none"> • Public lectures by sanctuary staff • Presence at local community events • On-site interpretive programs • Works with local Native tribes to develop ecotourism plans • Local school district marine science curriculum development, including field investigations. • Interpretive signs, publications • Interpretive Summer Day Camps • Bi-Monthly Sanctuary Office Report

Table B-1 (Continued)
Olympic Coast National Marine Sanctuary

Attendance	“Over three million visitors discover the Olympic Peninsula each year, attracted by beautiful scenery, pristine wilderness, the spectacle of wildlife and the opportunity to challenge themselves in a natural environment.” – Sanctuary Website
Admission Fees	Free admission to Discovery Center
Operating Cost	N/A
Management Plan	September 2011

Source: NOAA

Figure B-1
Olympic Coast National Marine Sanctuary



Source: Portocallpublishing.com

Figure B-2
Olympic Coast National Marine Sanctuary



Source: TripAdvisor.com

Figure B-3
Olympic Coast National Marine Sanctuary



Photo: Kate Thompson/NOAA

Table B-2
Cordell Bank National Marine Sanctuary

Sanctuary Name	Cordell Bank National Marine Sanctuary
Location / Address	1 Bear Valley Rd. Point Reyes Station, CA 94956
Area	The sanctuary protects an area of about 1,286 square miles.
Gateway City	Bodega Bay, CA
Proximate Metro Area Feeder	San Francisco, CA
Regional Catchment Area	San Francisco Media Market
Region	West Coast
Public Outreach Facility	No designated facility.
Partner Organizations	<p>Leveraging many partnerships, especially with other local NMS administration, to gain traction in the market.</p> <ul style="list-style-type: none"> • Oakland Museum of California • Bodega Marine Lab • Point Reyes National Seashore • Greater Farallones National Marine Sanctuary • Monterey Bay National Marine Sanctuary • U.S. Coast Guard • National Marine Fisheries Service • U.S. Environmental Protection Agency • U.S. Fish and Wildlife Service • Local and Regional public schools • Golden Gate National Recreation Area • California State Parks • California Coastal Monument • San Francisco Bay National Estuarine Research Reserve • Sonoma County Regional Parks • University of California System • Local colleges and community colleges • Sea Ranch Association • National Marine Sanctuary Foundation • California Academy of Science • National Weather Service

Table B-2 (Continued)
Cordell Bank National Marine Sanctuary

Interpretive Plan	<ul style="list-style-type: none"> • Field Seminars with Point Reyes National Seashore Association • Exhibit at Oakland Museum of California Natural Science Gallery • Habitat tanks and informational exhibit panels at Bodega Marine Lab • Informational exhibits at Bear Valley Visitor Center at Point Reyes National Seashore • Lecture Series • Monthly radio show • Programming at local schools • Teacher training for sanctuary and ecosystem educational curricula • Production of exhibit materials, interpretive displays, brochures, website, and field ecology outings.
Attendance	N/A
Admission Fees	N/A
Operating Cost	N/A
Management Plan	December 2014

Source: NOAA

Figure B-4
Cordell Bank National Marine Sanctuary Exhibit at
Gallery of California Natural Science at Oakland Museum of California



Source: NOAA

Figure B-5
Cordell Bank National Marine Sanctuary Exhibit, Bodega Marine Lab



Source: NOAA

Figure B-6
Bear Valley Visitor Center, Point Reyes National Seashore



Source: NOAA

Table B-3
Greater Farallones National Marine Sanctuary

Sanctuary Name	Greater Farallones National Marine Sanctuary
Location / Address	991 Marine Drive, The Presidio San Francisco, CA 94129
Gateway City	San Francisco, CA
Proximate Metro Area Feeder	San Francisco, CA
Regional Catchment Area	San Francisco Media Market
Region	West Coast
Public Outreach Facility	Farallones National Marine Sanctuary Visitor Center
Partner Organizations	<ul style="list-style-type: none"> • Education & Research Institutions <ul style="list-style-type: none"> ○ California Academy of Sciences ○ College of Marin ○ San Francisco State University ○ Stanford University ○ University of California • Federal Agencies <ul style="list-style-type: none"> ○ Environmental Protection Agency ○ National Park Service ○ Army Corps of Engineers ○ U.S. Coast Guard ○ U.S. Fish and Wildlife Service ○ U.S. Geological Survey • Local & State Agencies <ul style="list-style-type: none"> ○ Bodega Harbor District ○ California Coastal Commission ○ California Coastal Conservancy ○ California Department of Fish and Game ○ California Department of Parks and Recreation ○ California State Lands Commission ○ Marin County Department of Parks, ○ Open Space and Cultural Services ○ Pillar Point Harbor District ○ Regional Water Quality Control Boards ○ San Francisco Bay Conservation and Development Commission ○ San Francisco Recreation and Parks ○ San Mateo County Parks and Recreation Division

Table B-3 (Continued)
Greater Farallones National Marine Sanctuary

Partner Organizations (Continued)	<ul style="list-style-type: none"> • Non-Governmental Organizations <ul style="list-style-type: none"> ○ AmeriCorps ○ Audubon Canyon Ranch ○ Coastal America ○ Farallones Marine Sanctuary Association ○ Marin Agricultural Land Trust ○ Ocean Conservancy ○ Oceanic Society ○ Oiled Wildlife Care Network ○ Pacific Coast Federated Fishermen's Associations ○ Pacifica Chamber of Commerce ○ PRBO (Point Reyes Bird Observatory) ○ Save Our Shores ○ Sonoma Land Trust ○ The Marine Mammal Center ○ Environmental Action Committee
Interpretive Plan	<ul style="list-style-type: none"> • Exhibits at Greater Farallones National Marine Sanctuary Visitor Center • Informational exhibits at Bear Valley Visitor Center at Point Reyes National Seashore • “Dive Into Your National Marine Sanctuaries” exhibit at Aquarium of the Bay • “California Coast” exhibit at Cal Academy of Science (including 100,000 gallon touch tank) • Pigeon Point Light Station Exhibit at Pigeon Point State Park • Visitor center educational programs • In-school educational programs • After School Ocean Education Programs • Evening programs and lectures for adults • Family Workshops • Sanctuary Exploration (kayak trips) • Marine explorers day camps • Educator Professional Development Workshops • Free posters for hanging in classrooms
Attendance	N/A
Admission Fees	Free Admission
Operating Cost	N/A
Management Plan	October 2008

Source: NOAA

Figure B-7
Greater Farallones National Marine Sanctuary Visitor Center



Source: NOAA

Figure B-8
Pigeon Point Light Station Exhibit, California State Parks



Source: NOAA

Figure B-9
Dive Into Your National Marine Sanctuaries Exhibit at Aquarium of the Bay



Source: NOAA

Figure B-10
California Coast Exhibit, Cal Academy of Sciences



Source: NOAA

Figure B-11
Bear Valley Visitor Center, Point Reyes National Seashore



Source: NOAA

Table B-4
Monterey Bay National Marine Sanctuary

Sanctuary Name	Monterey Bay National Marine Sanctuary
Location / Address	99 Pacific Street, Bldg. 455A Monterey, California 93940
Gateway City	Monterey and Santa Cruz, CA
Proximate Metro Area Feeder	Santa Cruz/Monterey, CA
Regional Catchment Area	San Francisco Metro + Monterey, San Benito, San Luis Obispo and Santa Cruz Counties
Region	West Coast
Outreach Facility	<ul style="list-style-type: none"> • Monterey Bay Sanctuary Exploration Center (Opened 2012, 12,000 SF) • Coastal Discovery Center at Hearst Memorial Beach (Opened 2006, 2,000 SF)
Partner Organizations	<ul style="list-style-type: none"> • California Coastal National Monument • California Regional Environmental Education Community (CREEC Network) (South Bay Region 5) • California State Parks (Santa Cruz, Monterey, San Luis Obispo Coast Districts) • California State University Monterey Bay, Division of Science and Environmental Policy • Institute for Applied Marine Ecology • Return of the Natives • Camp SEA Lab • Coastal Watershed Council • Cities of Santa Cruz, Watsonville • Elkhorn Slough National Estuarine Research Reserve • Friends of the Elephant Seals • Friends of Hearst Castle • Marine Advanced Technology Education (MATE) • Moss Landing Marine Labs, California State University • Monterey Bay Aquarium & Research Institute • Farallones, California, and National Marine Sanctuary Foundations • Morro Bay National Estuary Program • Ocean Conservancy • O'Neill Sea Odyssey • Pacific Grove Natural History Museum • Piedras Blancas Light Station • Save Our Shores • Seymour Marine Discovery Center at Long Marine Laboratory, UCSC • Watsonville Wetlands Watch

Table B-4 (Continued)
Monterey Bay National Marine Sanctuary

Interpretive Plan	<ul style="list-style-type: none"> • Sanctuary Exploration Center in Santa Cruz • Coastal Discovery Center at William Randolph Hearst Memorial Beach and Hearst Castle • Production of materials, resources, print guides, books, maps, and posters for educational purposes. • Development of school curricula • Voices of the Bay history interpretation program • Ocean Guardian School • Volunteer water-quality testing • Sanctuary Classic – Nationwide fishing and photo contest for kids. • First Flush post-storm water quality testing of storm runoff • Sanctuary Currents Symposium • Coastal Cleanup Day • Whalefest • Great Annual Fish Count
Attendance	Projected Attendance to Marine Sanctuary Exploration Center was 150,000 Visitors per Year. Coastal Discovery Center estimated 80,000 per year.
Admission Fees	Free Admission
Operating Cost	N/A
Management Plan	October 2008

Source: NOAA

Figure B-12
Monterey Bay Sanctuary Exploration Center



Source: NOAA

Figure B-13
Monterey Bay Sanctuary Exploration Center



Source: NOAA

Table B-5
Channel Islands National Marine Sanctuary

Sanctuary Name	Channel Islands National Marine Sanctuary
Location / Address	University of California Santa Barbara Ocean Science Education Building 514, MC 6155 Santa Barbara, CA 93106-6155
Gateway City	Santa Barbara and Ventura, CA
Proximate Metro Area Feeder	Santa Barbara / Ventura, CA
Regional Catchment Area	Los Angeles Media Market + Santa Barbara and San Luis Obispo Counties
Region	West Coast
Outreach Facility	Center for Environmental Communication and Education at UC Santa Barbara – Proposed environmental education center
Partner Organizations	<ul style="list-style-type: none"> • UC Santa Barbara • Marine Science Institute • Bren School of Environmental Science and Management • Gevirtz Graduate School of Education • California Department of Fish and Wildlife – Marine Region • Channel Islands National Park • National Center for Ecological Analysis and Synthesis (NCEAS) • The Nature Conservancy • NOAA Coastwatch • NOAA National Marine Fisheries Service (Southwest Regional Office) • Northwest Fisheries Science Center • Southwest Fisheries Science Center • NOAA National Marine Sanctuary Science Program • Sanctuary Integrated Monitoring Network (SIMoN) • Santa Barbara Museum of Natural History • California Seafloor Mapping Program

Table B-5 (Continued)
Channel Islands National Marine Sanctuary

Interpretive Plan	<ul style="list-style-type: none"> • Interpretive Exhibits and Visitor Information at <ul style="list-style-type: none"> ○ Channel Island Boating Center ○ Center for Environmental Communication and Education • Other Related Exhibits <ul style="list-style-type: none"> ○ Outdoors Santa Barbara Visitor Center ○ The Santa Barbara Maritime Museum ○ Cabrillo High School Aquarium ○ S.B. Museum of Natural History Ty Warner Sea Center ○ Channel Islands National Park Visitor Center ○ South Coast Watershed Resource Center • Center for Environmental Communication and Education at UC Santa Barbara – Proposed environmental education center • Production of multimedia outreach products • Teacher resources, activities, and programs, including California B-WET, Merito Academy, LiMPETS, Channel Islands NMS Teacher at Sea Program • Online resources and educational activities for kids • Lectures, talks, and workshops
Attendance	N/A
Admission Fees	Free Admission
Operating Cost	N/A
Management Plan	January 2009

Source: NOAA

Figure B-14
Center for Environmental Communication and Education at UC Santa Barbara



Source: CECE/NOAA

Table B-6
Gray's Reef National Marine Sanctuary

Sanctuary Name	Gray's Reef National Marine Sanctuary
Location / Address	10 Ocean Science Circle Savannah, GA 31411
Gateway City	Savannah, GA
Proximate Metro Area Feeder	Savannah, GA
Regional Catchment Area	Savannah Media Market + Glynn, Brantley, and Camden Counties
Region	Southeast
Outreach Facility	No Designated Facility
Partner Organizations	<ul style="list-style-type: none"> • Tybee Island Marine Science Center • Georgia Southern University Museum • Riverbanks Zoo • Sapelo Island National Estuarine Research Reserve • NOAA Fisheries Service • United States Coast Guard • Georgia Department of Natural Resources (GADNR) • South Carolina Department of Natural Resources (SCDNR) • South Atlantic Fishery Management Council (SAFMC) • Skidaway Institute of Oceanography (SkIO) • University System of Georgia
Interpretive Plan	<ul style="list-style-type: none"> • Exhibit Partnerships with <ul style="list-style-type: none"> ○ The Georgia Aquarium (Atlanta, GA) ○ Tybee Island Marine Science Center (Tybee Island, near Savannah, GA) ○ The Fernbank Museum of Natural History (Atlanta, GA) ○ University of Georgia's Marine Education Center and Aquarium (MAREX) on Skidaway Island, near Savannah, GA. ○ Georgia Southern University (Statesboro, GA.) ○ South Carolina Aquarium • Sapelo Island National Estuarine Research Reserve Visitor's Center exhibit space • Riverbanks Zoo features exhibits on Gray's Reef
Attendance	N/A
Admission Fees	N/A
Operating Cost	
Management Plan	July 2014

Source: NOAA

Figure B-15
Tybee Island Marine Science Center



Source: NOAA

Figure B-16
Georgia Southern University Museum



Source: NOAA

Table B-7
Florida Keys National Marine Sanctuary

Sanctuary Name	Florida Keys National Marine Sanctuary
Location / Address	Nancy Foster Florida Keys Environmental Complex 33 East Quay Road Key West, FL 33040 305-809-4700
Area	2,900 square nautical miles
Gateway City	Key West and Key Largo, FL
Proximate Metro Area Feeder	Miami, FL
Regional Catchment Area	Miami Media Market
Region	Southeast
Outreach Facility	Florida Keys Eco-Discovery Center
Partner Organizations	<ul style="list-style-type: none"> • FL Department of Environmental Protection (Primary Management Partner) • South Florida Water Management District • Everglades and Dry Tortugas National Parks • National Wildlife Refuges of the Florida Keys • Eastern National • REEF • The Nature Conservancy • Florida International University • FL Fish and Wildlife Conservation Commission • U.S. Coast Guard • U.S. Fish and Wildlife Service • U.S. Environmental Protection Agency • Google • Catlin Seaview Survey • Mote Marine Laboratory • Blue Star Diving and Snorkeling Gear Dealers
Interpretive Plan	<ul style="list-style-type: none"> • Florida Keys Eco-Discovery Center (6,000 SF) interpretive project between two national parks, four national wildlife refuges, and the Florida keys NMS • Seagrass monitoring program with FIU • Research expeditions tagging fish • NOAA Teachers at Sea Program • Production of online materials, including maps and educational resources • Boating and boating skills courses with U.S. Coast Guard • School programs • Team OCEAN Volunteer program – public outreach about boating etiquette and ocean conservation within the sanctuary • Blue Star Program – designation for gear dealers who prioritize sustainable and responsible diving

Table 7 (Continued)
Florida Keys National Marine Sanctuary

Attendance	N/A
Admission Fees	Free Admission
Operating Cost	
Management Plan	December 2007

Source: NOAA

Figure B-17
Florida Keys Eco-Discovery Center



Source: NOAA

Table B-8
Flower Garden Banks National Marine Sanctuary

Sanctuary Name	Flower Garden Banks National Marine Sanctuary
Location / Address	Flower Garden Banks National Marine Sanctuary 4700 Avenue U, Building 216 Galveston, TX 77551
Area	East and West Flower Garden Banks combined cover about 350 acres.
Gateway City	Galveston, TX
Proximate Metro Area Feeder	Houston, TX
Regional Catchment Area	Houston Media Market + Jefferson, Hardin, and Orange Counties
Region	Southeast
Outreach Facility	N/A
Partner Organizations	<ul style="list-style-type: none"> • Zoo and Aquarium Partners <ul style="list-style-type: none"> ○ Cameron Park Zoo ○ Texas State Aquarium ○ Tennessee Aquarium ○ Children’s Aquarium at Fair Park (Dallas Zoo) ○ Aquarium at Rockport Harbor ○ Moody Gardens ○ Audubon Aquarium of the Americas, New Orleans • NOAA Ocean Exploration • Many projects are developed through a larger network of partnerships • Secrets of the Gulf Expedition Partners <ul style="list-style-type: none"> ○ Immersion Presents ○ U.S. Navy ○ University of Rhode Island ○ Mystic Aquarium and Institute for Exploration ○ Mashantucket Pequot Museum ○ Devon Energy Corporation ○ Dominion ○ Dr. Scholl Foundation ○ Minerals Management Service ○ Public Archaeology Laboratory ○ University of Connecticut ○ U.S. Department of Justice ○ Office of Justice Programs ○ Institute of Museum and Library Services ○ U.S. Department of Energy • Gulf of Mexico Foundation • National Marine Sanctuary Foundation

Table B-8 (Continued)
Flower Garden Banks National Marine Sanctuary

Interpretive Plan	<ul style="list-style-type: none">• 50,000-gallon exhibit at the Cameron Park Zoo• 40,000-gallon exhibit on coral reefs at Texas State Aquarium with in-tank diver exhibits• 618,00-gallon saltwater exhibit, “The Secret Reef” at the Tennessee Aquarium• Aquarium exhibit at Children’s Aquarium at Fair Park• Online Student Resources• Downloadable classroom education materials for teachers• Field Workshops and Research excursions, including Down Under, Out Yonder Coral Reef Workshop and SCUBA field trip for educators
Attendance	N/A
Admission Fees	N/A
Operating Cost	
Management Plan	April 2012

Source: NOAA

Figure B-18
Cameron Park Zoo Aquarium NOAA Exhibit



Source: NOAA (Cameron Park Zoo)

Figure B-19
Texas State Aquarium NOAA Exhibit



Source: NOAA (Texas State Aquarium)

Figure B-20
Tennessee Aquarium NOAA Exhibit



Source: NOAA (Tennessee Aquarium)

Figure B-21
Children's Aquarium at Fair Park NOAA Exhibit



Source: NOAA (Children's Aquarium at Fair Park)

Table B-9
Papahānaumokuākea Marine National Monument

Sanctuary Name	Papahānaumokuākea Marine National Monument
Location / Address	NOAA/DKIRC ATTN: NOS/HIHWNMS 1845 Wasp Blvd., Bldg. 176 Honolulu, HI 96818
Area	139,797 square miles of the Pacific Ocean
Region	Pacific Islands
Outreach Facility	Mokupapapa Discovery Center 76 Kamehameha Ave Hilo, HI 96720
Partner Organizations	<ul style="list-style-type: none"> • Management Partners <ul style="list-style-type: none"> ○ Hawaii Department of Land and Natural Resources ○ U.S. Fish and Wildlife Service • Exhibit Partners <ul style="list-style-type: none"> ○ Nantucket Historical Whaling Museum ○ Waikiki Aquarium • Bishop Museum (Honolulu) • Hawaii Conservation Alliance • Hawaii Institute of Marine Biology • National Biological Information Infrastructure Pacific Basin Information Node • U.S. Geological Survey • Pacific Islands Climate Change Cooperative • Ka'ena Point State Park / Natural Reserve Area • Hawaii Volcanoes National Park • Kilauea Point National Wildlife Refuge • Kure Atoll State Wildlife Sanctuary • U.S. Coast Guard

Table B-9 (Continued)
Papahānaumokuākea Marine National Monument

Interpretive Plan	<ul style="list-style-type: none"> • Mokupapapa Discovery Center in Hilo (20,000 SF nature, culture, and history discovery center including 3,500-gallon saltwater aquarium) • Exhibit Partnerships: <ul style="list-style-type: none"> ○ Lost on a Reef exhibit at Nantucket Historical Whaling Museum ○ Marine Life of Northwestern Hawaiian Islands Exhibit at Waikiki Aquarium ○ Bishop Museum • Navigating Change Education and Environmental Stewardship Program • Reef Assessment and Monitoring Program Cruise • Online Publications for students and teachers • Programming at park and refuge partners • Online Virtual Visitors • Co-production of books and films about Hawaiian natural resources • Volunteer and Staff outreach talks and lectures • Beach cleanup programming
Attendance	60,000 (Estimated)
Admission Fees	Free
Operating Cost	
Management Plan	December 2008

Source: NOAA

Figure B-22
Mokupāpapa Discovery Center



Source: NOAA (Mokupāpapa Discovery Center)

Figure B-23
Nantucket Historical Whaling Museum



Source: NOAA (Nantucket Historical Whaling Museum)

Figure B-24
Waikiki Aquarium NOAA Exhibit



Source: NOAA (Waikiki Aquarium)

Table B-10
Hawaiian Island Humpback Whale National Marine Sanctuary

Sanctuary Name	Hawaiian Island Humpback Whale National Marine Sanctuary
Location / Address	726 South Kihei Road Kihei, Hawai'i 96753
Area	1,218 square nautical miles
Gateway City	Kihei, Lahaina, Kailua-Kona, Kauai, Honolulu
Proximate Metro Area Feeder	Honolulu, HI
Regional Catchment Area	Honolulu Media Market
Region	Pacific Islands
Outreach Facility	Hawaiian Islands Humpback Whale NMS Visitor Center and Sanctuary Education Center, Maui
Partner Organizations	<ul style="list-style-type: none"> • Joint Management <ul style="list-style-type: none"> ○ NOAA Office of National Marine Sanctuaries ○ State of Hawaii Dept. of Land and Natural Resources • Lahaina Heritage Museum • University of Hawaii Sea Grant • Waikiki Aquarium • U.S. Coast Guard • Native Hawaiian Cultural Organizations
Interpretive Plan	<ul style="list-style-type: none"> • Hawaiian Islands Humpback Whale NMS Visitor Center and Sanctuary Education Center, Maui • Hawaiian Heritage and Whaling History Exhibit at Lahaina Heritage Museum • Educator and student workshops • Community lectures • Shore-based whale watches • Volunteer and naturalist training sessions • Sanctuary publications • Humpback whale research – photo identification, population, birth and mortality rates, whale behavior • Native Hawaiian culture education programming
Attendance	N/A
Admission Fees	Free Admission at NMS Visitor Center
Operating Cost	
Management Plan	August 2002 – Management Plan Currently Under Review

Source: NOAA

Figure B-25
Hawaiian Islands Humpback Whale NMS Visitor Center and
Sanctuary Education Center



Source: Andy Collins/NOAA

Figure B-26
Lāhaina Heritage Museum-Old Lāhaina Courthouse



Source: Lāhaina Heritage Museum-Old Lāhaina Courthouse/NOAA

Table B-11
National Marine Sanctuary of American Samoa

Sanctuary Name	National Marine Sanctuary of American Samoa (Formerly Fagatele Bay National Marine Sanctuary)
Location / Address	National Marine Sanctuary of American Samoa P.O. Box 4318 Pago Pago, American Samoa 96799
Area	The sanctuary is comprised of six protected areas, covering 13,581 square miles of nearshore coral reef and offshore open ocean waters across the Samoan Archipelago (expanded in 2012 from 0.25 square miles)
Gateway City	Pago Pago, American Samoa
Proximate Metro Area Feeder	Pago Pago
Regional Catchment Area	American Samoa
Region	Pacific Islands
Outreach Facility	Tauese P.F. Sunia Ocean Center
Admission Fees	Free
Partner Organizations	<ul style="list-style-type: none"> • NOAA co-manages the sanctuary with the American Samoa Government, specifically the American Samoa Department of Commerce • National Park Service • American Samoa Department of Marine and Wildlife Resources • Local tourism organizations and operators • Local Schools • American Samoa Aquatic Agency • American Samoa Department of Education • American Samoa Community College • U.S. Coast Guard • National Marine Fisheries Service • American Samoa Environmental Protection Agency • The Nature Conservancy
Interpretive Plan	<ul style="list-style-type: none"> • Tauese P.F. Sunia Ocean Center exhibit on culture, history, and natural environment of American Samoa • Active production of print, audio, and video media for distribution in communities to communicate goals and operations of Sanctuary • 2013 film production with Jean Michel Cousteau (Ocean Futures Society) and Dan Basta (Director of National Marine Sanctuaries). • Tourism Partnerships to promote sanctuary in Samoan tourism industry • Sanctuary Wellness Program – promoting healthy lifestyles among Samoan population. • Ocean Swimming / Ocean Science – teaching students about safe and sustainable ocean swimming.

Table B-11 (Continued)
National Marine Sanctuary of American Samoa

Attendance	12,000 (2013)
Admission Fees	N/A
Operating Cost	
Management Plan	June 2012

Source: NOAA

Figure B-27
Tauese P.F. Sunia Ocean Center



Source: NOAA / Tauese P.F. Sunia Ocean Center

Figure B-28
Tauese P.F. Sunia Ocean Center



Ocean Center Conference Settings



Source: NOAA / Tauese P.F. Sunia Ocean Center

Table B-12
Thunder Bay National Marine Sanctuary

Sanctuary Name	Thunder Bay National Marine Sanctuary
Location / Address	500 W. Fletcher Alpena, Michigan 49707
Area	4,300 square miles
Gateway City	Alpena, MI
Proximate Metro Area Feeder	Saginaw-Bay City, MI
Regional Catchment Area	Saginaw-Bay City-Midland Media Market
Region	Northeast and Great Lakes
Outreach Facility	Great Lakes Maritime Heritage Center
Admission Fees	Free admission
Partner Organizations	<ul style="list-style-type: none"> • State of Michigan / Michigan Historical Center • Thunder Bay Underwater Preserve • Inland Seas Education Association • Michigan Science Teachers Association • Alpena Community College • Northwest Michigan Great Lakes Stewardship Initiative • Chicago’s Museum of Science and Industry • Michigan Sea Grant • 4H • Michigan STEM Partnership • Local and Regional Public Schools • Thunder Bay International Film Festival • Alpena Wildlife Sanctuary • Alpena Shipwreck Tours
Interpretive Plan	<ul style="list-style-type: none"> • Great Lakes Maritime Heritage Center (9,000 SF of exhibit space, maritime history museum) • Formal education programs for students K-12 and college • Informal education programs, including field trips, site-based experiences, contests, trainings, after school activities, and summer camps • Outreach programs at lectures, conferences, events, and booths • Distance learning opportunities • ROV (Remote-Operated Vehicle) building programs and competitions • “Great Ships on the Great Lakes – A Maritime History” Student publication • Professional development programs for teachers, including ROV design/build and web-based mapping • Alpena Wildlife Sanctuary exhibit
Attendance	94,014 visitors between October 2013 and September 2014.
Admission Fees	N/A
Operating Cost	
Management Plan	2009

Source: NOAA

Figure B-29
Great Lakes Maritime Heritage Center



Source: NOAA

Figure B-30
Great Lakes Maritime Heritage Center



Source: thunderbay.noaa.gov

Figure B-31
Great Lakes Maritime Heritage Center



Source: thunderbay.noaa.gov

Figure B-32
Great Lakes Maritime Heritage Center



Source: thunderbay.noaa.gov

Table B-13
Monitor National Marine Sanctuary

Sanctuary Name	Monitor National Marine Sanctuary
Location / Address	Monitor National Marine Sanctuary 100 Museum Drive Newport News, VA 23606
Area	One mile radius from site of USS Monitor
Gateway City	Buxton, Matteras, NC, and Newport News, VA
Proximate Metro Area Feeder	Norfolk-Virginia Beach-Newport News, VA
Regional Catchment Area	Norfolk-Portsmouth-Newport News Media Market
Region	Northeast and Great Lakes
Outreach Facility	USS Monitor Center and Foundation at the Mariners' Museum and Park
Partner Organizations	<ul style="list-style-type: none"> • Museums and Aquariums <ul style="list-style-type: none"> ○ The Mariners' Museum, Newport News ○ Graveyard of the Atlantic Museum ○ Greenpoint Monitor Museum ○ Hampton Roads Naval Museum ○ Jennette's Pier ○ Nauticus ○ North Carolina Aquarium ○ North Carolina Maritime Museum ○ Old Coast Guard Station • Academia <ul style="list-style-type: none"> ○ Duke University Marine Laboratory ○ East Carolina University ○ Florida Public Archaeology Network ○ Louisiana State University FACES Laboratory ○ North Carolina Sea Grant ○ North Carolina State Center for Marine Sciences and Technology ○ Texas A&M University: Nautical Archaeology ○ University of North Carolina Coastal Studies Institute ○ University of Rhode Island ○ University of Texas: Applied Research Laboratory ○ University of West Florida ○ Woods Hole Oceanographic Institute

Table B-13 (Continued)
Monitor National Marine Sanctuary

<p>Partner Organizations (Continued)</p>	<ul style="list-style-type: none"> • Government and State Agencies <ul style="list-style-type: none"> ○ Bureau of Ocean Energy Management ○ Bureau of Safety and Environmental Enforcement ○ Mid-Atlantic Regional Council on Oceans (MARCO) ○ National Park Service Submerged Resources Center ○ North Carolina Department of Natural and Cultural Resources ○ North Carolina National Estuarine Research Reserve (Hatteras and Beaufort, N.C.) ○ North Carolina Underwater Archaeology Branch ○ Ocean Exploration ○ United Kingdom's Royal Navy ○ U.S. Coast Guard ○ U.S. Navy History and Heritage Command ○ U.S. Navy Mobile Diving Salvage Unit 2 • Businesses <ul style="list-style-type: none"> ○ Advanced Underwater Surveys (ADUS) ○ Bass Pro ○ Discovery Diving ○ Roanoke Island Outfitters and Dive Shop ○ Rum Runner Dive Shop ○ SRI International ○ Under Pressure Diving • Non-profits <ul style="list-style-type: none"> ○ Battle of the Atlantic Research and Expedition Group • Nautical Archaeology Society
<p>Interpretive Plan</p>	<ul style="list-style-type: none"> • USS Monitor Center at Mariners' Museum • Online educational materials and activities for students • Educational materials for teachers about the Monitor, including STEAM curricula • USS Monitor Encyclopedia of the Sanctuary • Lectures and speakers • Presence at local events, including music festivals • Active volunteer corps for research data collection and outreach events
<p>Attendance</p>	<p>USS Monitor Center and Foundation at the Mariners' Museum and Park - 69,732 (Official Museum Directory Online, Accessed 8/10/2016)</p>
<p>Admission Fees</p>	<p>Adults: \$13.95 Military and Seniors: \$12.95 Children (4-12): \$8.95</p>
<p>Operating Cost</p>	
<p>Management Plan</p>	<p>February 2013 – Management Plan Currently Under Review</p>

Source: NOAA

Figure B-33
Monitor NMS Booth and SRVx Sand Tiger at Harborfest 2015



Photo: NOAA

Figure B-34
USS Monitor Turret Replica



As-found USS Monitor turret, upside down; a full-scale replica, inside
The USS Monitor Center
Source: MonitorCenter.org

Figure B-35
USS Monitor Center



Source: MonitorCenter.org

Table B-14
Mallows Bay Proposed National Marine Sanctuary

Sanctuary Name	Proposed - Mallows Bay - Potomac River
Contact Info	Paul Orlando Regional Coordinator Northeast and Great Lakes 240-460-1978 paul.orlando@noaa.gov
Region	Northeast and Great Lakes
Description	<p>Mallows Bay – Potomac River is a 14 square mile area of the tidal Potomac River adjacent to Charles County. It was nominated as a National Marine Sanctuary through the Sanctuary Nomination Process with broad community support.</p> <p>The area encompasses historic shipwrecks of national significance that merit the additional management authority of the National Marine Sanctuaries Act. Nearly 200 known vessels span from the Revolutionary War through the present, and include the remains of the largest “Ghost Fleet” of World War I, wooden steamships built for the U.S. Emergency Fleet, which are listed on the National Register of Historic Places.</p> <p>Mallows Bay is a largely undeveloped landscape and waterscape identified as one of the most ecologically valuable in Maryland, as the ship remains provide important habitat for fish and wildlife, including rare, threatened and endangered species. (From NOAA Sanctuaries Website)</p>
About the Nomination	<p>In September 2014, the state of Maryland submitted a nomination to be added to NOAA’s inventory of places to be considered as national marine sanctuaries. The nomination focused on protecting and interpreting the nationally significant collection of shipwrecks, fostering partnerships with education and research partners, and increasing opportunities for tourism and economic development.</p> <p>It was endorsed by a diverse coalition of organizations and individuals at local, state, regional and national levels. This included elected officials, Native Americans, historical societies, businesses, museums, and environmental, recreational, conservation, fishing, tourism and educational groups. (From NOAA Sanctuaries Website)</p>

Source: NOAA

Table B-15
Lake Michigan Proposed National Marine Sanctuary

Sanctuary Name	Proposed - Wisconsin - Lake Michigan
Location / Address	Ellen Brody Great Lakes Regional Coordinator 734-741-2270 ellen.brody@noaa.gov
Region	Northeast and Great Lakes
Description	<p>Wisconsin – Lake Michigan is an 875 square mile area of Lake Michigan with waters extending from Port Washington to Two Rivers. The state of Wisconsin nominated this area as a national marine sanctuary through the Sanctuary Nomination Process with broad community support.</p> <p>The area encompasses historic shipwrecks of national significance that merit the additional management authority of the National Marine Sanctuaries Act. The nominated area contains an extraordinary collection of 39 known shipwrecks, 15 of which are listed on the National Register of Historic Places.</p> <p>Fourteen of the known shipwrecks are essentially intact and three vessels possess standing masts – a rarity in the Great Lakes. The area also includes Wisconsin's two oldest known shipwrecks. Archival and archaeological research indicates that the proposed sanctuary also includes 123 reported vessel losses. (From NOAA Sanctuaries Website)</p>
About the Nomination	<p>In December 2014, the state of Wisconsin submitted a nomination to be added to NOAA's inventory of places to consider as national marine sanctuaries. The nomination is focused on protecting and interpreting the nationally significant collection of shipwrecks, fostering partnerships with education and research partners, and increasing opportunities for tourism and economic development.</p> <p>It was endorsed by a diverse coalition of organizations and individuals at local, state, regional and national levels. This included elected officials, historical societies, businesses, museums, and environmental, recreational, conservation, fishing, tourism and educational groups. (From NOAA Sanctuaries Website)</p>

Source: NOAA