



Board of Selectmen

Meeting Agenda

The Provincetown Board of Selectmen will hold a public meeting on Monday, June 26, 2017 at 4:30 p.m., in the Judge Welsh Meeting Room, Town Hall, 260 Commercial Street, Provincetown, MA 02657

1. Round table Discussion with the Visitor Services Board to discuss strategic planning, spending and operations.

Approved: CLA 6-22-17

Posted by the Acting Town Clerk: www.provincetown-ma.gov, 6/22/17 1:35 pm dv



Provincetown Board of Selectmen
AGENDA ACTION REQUEST
Monday, June 26, 2017 @ 4:30 p.m.

1

TOURISM STRATEGIC PLANNING

Joint Meeting / Round Table Discussion with the Visitor Services Board

Requested by: Board of Selectmen

Action Sought: Discussion

Proposed Motion(s)

Discussion Dependent

Additional Information

See attached documents.

Board Action

<i>Motion</i>	<i>Second</i>	<i>Yea</i>	<i>Nay</i>	<i>Abstain</i>	<i>Disposition</i>

Memo

To: Board of Selectmen
From: Elizabeth Paine
Date: June 22, 2017
Re: Brief History of the Visitor Services Board

- April 1997 Special Town Meeting Article 5 the Visitor Services Board was established.
- April 1999 Voters approved the Municipal Advertising Committee rep to be replaced with an Arts Organization representative.

Mission & Authority:

To develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round. For the purpose of overseeing expenditures of the Tourism Fund with the expenditures of any funds of the Visitor Services Board to be expended under the Board of Selectmen.

Members:

- Richard Murray, Chair, PBG - Term Ends 6/30/17
- Regina Cassidy, Women Innkeepers - Term Ends 6/30/19
- Lesley Marchessault, Vice Chair, Arts Com. - Term Ends 6/30/19
- Dan Vanwaus, Chamber - Term Ends 6/30/18
- Robert Sanborn, At Large - Term Ends 6/30/17
- Rita "Hersh" Schwartz, At Large - Term Ends 6/30/17
- Marian Peck, At Large - Term Ends 6/30/19

Tourism Director Anthony Fuccillo
Tourism Assistant Director Radu Luca

In order to make any changes to the VSB as currently defined, it would need to be approved by Town Meeting vote.



Town of Provincetown TOWN MANAGER

Direct Line 508/487-7000

DATE: February 11, 1997

TO: *Visitor Services Task Force Members:*

David Asher
Sharon Barker
Kay Halle
Robert C. Harrison

James M. Jeffers
Lynette Molnar
Sabrina Riddle

FROM: Keith A. Bergman, Town Manager

SUBJ: Task Force Organizational Meeting: Thursday, February 13, 1997 @ 4 p.m. @
Town Hall; Selectmen's FY 1998 Tourism Fund Policy Guidelines

Congratulations on your appointment by the Board of Selectmen last night to the Visitor Services Task Force. This will confirm that I will be convening an organizational meeting of the Task Force this Thursday, February 13, 1997 at 4 p.m. in the Judge Welsh Room, Town Hall. As shown on the attached agenda, the first order of business will be your election of a chairman. Kindly arrange to visit the Town Clerk's office prior to 4 o'clock on Thursday in order to be sworn in as a Task Force member.

As you know, the specific charge of the Visitor Services Task Force, established by the Board of Selectmen on January 13, 1997, is to formulate recommendations to the Board of Selectmen on how to spend the estimated \$80,000 in the Tourism Fund¹ for FY 1998. The Selectmen have scheduled a joint meeting with the Task Force for Monday, March 3, 1997 at 7 p.m. to review your recommendations. Thereafter, the Board will submit an article onto the warrant for the April 7, 1997 Special Town Meeting (see draft form, attached).

Selectmen's Policy Guidelines. To guide your review of proposals for funding under the Tourism Fund for FY 1998, please know that the Board of Selectmen also voted last night to recommend that the following three categories each receive one third² of total funding:

1. municipal programs;
2. art, theatre, and music; and
3. other special events/promotions

The Board further voted that "all of the above to exclude any July/August proposals" and that "25% of the municipal programs to be allocated to Beautification and infrastructure proposals."

¹ Chapter 178 of the Acts of 1996 established the Tourism Fund, monies from which may be expended by town meeting to "market, beautify, and enhance tourism in" Provincetown. 25% of the local room tax goes into this Fund in FY 1997, 35% in FY 1998, and 45% in FY 1999 and thereafter.

² With an estimated \$80,000 to spend this April, this would mean \$26,666.66 earmarked for each category.

Copies of all of the proposals submitted for the Board of Selectmen's January 27, 1997 public hearing on the Tourism Fund-- a rather thick packet of materials-- will be distributed at Thursday afternoon's meeting for your review.

Please let me know what questions you have. Thanks very much.

Enclosures

cc: Board of Selectmen
Assistant Town Manager-designate E. Winn Davis
Town Clerk Stephan J. Nofield



Office of the Town Clerk

Stephan J. Nofield
Town Clerk

Town of Provincetown
260 Commercial Street
Provincetown, MA 02657
TEL: 508-487-7013
FAX: 508-487-9560

April 7, 1997 Special Town Meeting

Article 5. *Establishment of Visitor Services Board.*

To see if the Town will vote to authorize the Board of Selectmen to establish in the Town of Provincetown a Visitor Services Board to develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round and for the purpose of overseeing expenditures of the Tourism Fund, under the direction of the Town Manager, as appropriated by Town Meeting.

The Visitor Services Board shall consist of seven members appointed by the Board of Selectmen as follows: one member nominated by the Provincetown Chamber of Commerce, one member nominated by the Provincetown Business Guild, one member nominated by the Women Innkeepers of Provincetown, one member nominated by the Municipal Advertising Committee, and three members-at-large. The length of terms for the members serving on the Visitor Services Board will be staggered, with the length of terms determined by the Board of Selectmen.

[Requested by the Board of Selectmen, and the Visitor Services Task Force]

Henry Evans moved that the Town vote to authorize the Board of Selectmen to establish in the Town of Provincetown a Visitor Services Board to develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round and for the purpose of overseeing expenditures of the Tourism Fund, under the direction of the Town Manager, as appropriated by Town Meeting. The Visitor Services Board shall consist of seven members appointed by the Board of Selectmen as follows: one member nominated by the Provincetown Chamber of Commerce, one member nominated by the Provincetown Business Guild, one member nominated by the Women Innkeepers of Provincetown, one member nominated by the Municipal Advertising Committee, and three members-at-large. The length of terms for the members serving on the Visitor Services Board will be staggered, with the length of terms determined by the Board of Selectmen.

Susan Leven moved to see if the Town will vote to amend the proposed article by replacing the word "seven" with "eight" and by adding the words "one member nominated by the Provincetown Restaurant Association," following the words "Municipal Advertising Committee," in the second paragraph so that it reads: The Visitor Services Board shall consist of eight members appointed by the Board of Selectmen as follows" one member nominated by the Provincetown Chamber of Commerce, one member nominated by the

First Landing Place of the Pilgrims



1620
1970

Provincetown Business Guild, one member nominated by the Municipal Advertising Committee, one member nominated by the Provincetown Restaurant Association, and three members-at-large. The length of terms for the members serving on the Visitors Services Board will be staggered, with the length of terms determined by the Board of Selectmen.

Amendment defeated

Mary-Jo Avellar moved to amend by making the expenditures of any funds of the Visitors Services Board to be expended under the Board of Selectmen.

Amendment Carried

So Voted April 7, 1997 Motion as amended carried.

The Mission of the Visitor Services Board

- *Develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round.
- *Recommend to the Board of Selectmen annual expenditures from the Tourism Fund that meet the criterion to market, beautify and enhance tourism in Provincetown.
- *Oversee the expenditures of the Tourism Fund.
- * Identify and/or initiate projects in conjunction with municipal entities that strengthen the Town as a tourist destination through public improvements. The Board will oversee municipal projects that are funded by the Tourism Fund.
- *Support special events that promote tourism and benefit the town. Such financial assistance will be awarded to applicants, either local organizations or individuals, on the basis of matching grants.
- *Promote a positive image of Provincetown.
- *Coordinate promotional efforts with other organizations and assist in maintaining and distributing a master calendar of events.
- * Advocate for improved tourist related services.
- *Provide direction to the Tourism Coordinator who will implement the plans of the Board.

Revd 12-4-27-95
Stephen J. Walker

Visitor Services Board

Mission & Authority:

To develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round. For the purpose of overseeing expenditures of the Tourism Fund with the expenditures of any funds of the Visitor Services Board to be expended under the Board of Selectmen.

Appointing Authority:

Board of Selectmen

Origins of Authority:

Authority	Summary
Special Town Meeting April 1997, Article 5	Establishes the Visitor Services Board and sets its composition.
Annual Town Meeting April 1996, Article 10	Instructs Town's representative in the General Court to file a Home Rule petition to established a Tourism Fund to market, beautify, and enhance tourism in the Town of Provincetown. Twenty-five percent of the excise collected under section 3A of Chapter 64G by the town of Provincetown for fiscal year ending June 30, 1997, shall be credited to the Tourism Fund; for fiscal year ending June 30, 1998, thirty-five percent; and for each succeeding fiscal year, forty-five percent.
Acts & Resolves 1996 Chapter 178	H.B. No. 5959 An Act establishing a Tourism Fund in the town of Provincetown.

Number of Members:

7 Board Members:

- 1 member nominated by the Provincetown Chamber of Commerce
- 1 member nominated by the Provincetown Business Guild
- 1 member nominated by the Women Innkeepers of Provincetown
- 1 member nominated by the Municipal Advertising Committee
- 3 members-at-large

Support & Resources:

Annual Budget Presented as Tourism Article at the Annual Town Meeting

Additional Guides:

Provincetown Committee Handbook

Visitor Services Board

Organization

Appointed by the Board of Selectmen

- 1 member nominated by the Provincetown Chamber of Commerce
- 1 member nominated by the Provincetown Business Guild
- 1 member nominated by the Women Innkeepers of Provincetown
- 1 member nominated by the Municipal Advertising Committee
- 3 members-at-large

Meeting Quorum 4 members

The length of terms for the members serving on the Visitor Services Board will be staggered with the length of terms determined by the Board of Selectmen.

Town Meeting Articles and State Legislation Concerning Visitor Services Committee Activities

Article 10. April 1996 Annual Town Meeting:

Dedicate Portion of Room Excise Tax for Tourism

Article 38. April 1997 Annual Town Meeting:

Use of Tourism Fund

Chapter 178 (House Bill No. 5959)

AN ACT establishing a Tourism Fund in the town of Provincetown

Responsibilities of the Visitor Services Committee

- ☞ To develop, coordinate and implement a long-term comprehensive plan to enhance tourism year-round.
- ☞ For the purpose of overseeing expenditures of the Tourism Fund with the expenditures of any funds of the Visitor Services Board to be expended under the Board of Selectmen.

Article 64. Amend Visitor Services Board Composition. To see if the Town will vote to amend its vote under Article 5 of the April 7, 1997 Special Town Meeting relative to the composition of the seven-member Visitor Services Board by deleting "one member nominated by the Municipal Advertising Committee" and amending "three members-at-large" to read "four members-at-large"; or take any other action relative thereto.

[Requested by the Visitor Services Board]

FINANCE COMMITTEE HAS NO RECOMMENDATION

Mike Wright moved Article 64 as printed in the Warrant.

Jane Antolini moved to strike "and amending "three members-at-large" to read "four members-at-large"; and replace with "and add one member from the Art community.

Amendment Carried.

Motion Carried as Amended.

Article 65. Amend Heritage Museum Board of Trustees Composition. To see if the Town will vote to rescind its vote under Article 17 of the November 6, 1995 Special Town Meeting, so that the membership of the Board of Trustees of the Heritage Museum is reduced from nine (9) back to seven (7) members to be appointed by the Board of Selectmen for staggered three-year terms; or take any other action relative thereto.

[Requested by the Heritage Museum Board of Trustees and the Board of Selectmen]

FINANCE COMMITTEE HAS NO RECOMMENDATION

Elizabeth Steele-Jeffers moved that the Town vote to rescind its vote under Article 17 of the November 6, 1995 Special Town Meeting, so that the membership of the Board of Trustees of the Heritage Museum is reduced from nine (9) back to seven (7) members to be appointed by the Board of Selectmen for staggered three-year terms.

Motion Carried.

Article 66. Proof of Residency for Town Board Applicants and Members. To see if the Town will vote as follows: WHEREAS: Many people are legally able to register to vote in Provincetown who do not actually live here; WHEREAS: People who do not live here should not serve on Boards or Committees making decisions that affect the Town; THEREFORE, to see if the Town will vote that people serving and those who apply to serve on any Town Board or Committee shall sign an affidavit at the Town Clerk's Office swearing that they reside in Provincetown and provide evidence such as utility bills, driver's license, car excise tax, etc. to establish their residency; or take any other action relative thereto.

[Requested by Barbara Rushmore and others]

FINANCE COMMITTEE RECOMMENDS: 6-0-0

Barbara Rushmore moved that the Town vote as follows: WHEREAS: Many people are legally able to register to vote in Provincetown who do not actually live here; WHEREAS: People who do not live here should not serve on Boards or Committees making decisions that affect the Town; THEREFORE, to see if the Town will vote that people serving and those who apply to serve on any Town Board or Committee shall sign an affidavit at the Town Clerk's Office swearing that they reside in Provincetown and provide evidence such as utility bills, driver's license, car excise tax, etc. to establish their residency.

Motion Defeated.

PROPERTY AND WAYS

Article 67. Easement for Court Street Properties. To see if the Town will vote to authorize the Board of Selectmen to grant a twenty-foot access easement across Town-owned property at 33A Court Street shown as Assessors Map 7-4, Parcel 49 to the Provincetown Housing Authority for its property at 35A Court Street (Assessors Map 7-24 Parcel 48) and to John R. Patrick for his property at 35 Court Street (Assessors Map 7-4, Parcel 47) in return for Patrick's grant of an easement to the Provincetown Housing Authority for water lines crossing the property at 35 Court Street; or to take any other action relative thereto.

Policy Statement

2004-09-14

Tourism Fund Expenditures

It shall be the policy of the Board of Selectmen that all expenditures from the Tourism Fund will first receive a vote from the members of the Visitors Service Board followed by a vote from the Board of Selectmen prior to the expenditures being processed for payment.

Adopted September 13, 2004

In favor: Andrews, Avellar, Couture, Peake, Olson

Opposed: None

Policy Statement

2004-11-29 *(This Policy Supersedes 2004-09-14)*

Tourism Fund Expenditures

It shall be the policy of the Board of Selectmen that "All tourism budget commitments, with exception of payroll and related costs, require a vote of approval by the Visitor Services Board. The Visitor Services Board (VSB) may delegate authorization to the Tourism Director for individual expenditures under \$400 from the Coordination and Support budget allocation. All vouchers will include the tourism director's signature and must be accompanied by an Authorization Form signed by the Chair of the VSB or the chair's designee following a vote of the majority of the VSB. All grant awards will require approval by both the Visitor Services Board and the Board of Selectmen. All commitments must be compliant with procurement laws and regulations and may require approval by the Board of Selectmen."

Adopted: November 29, 2004

In favor: Andrews, Avellar, Couture, Peake, Olson

Opposed: None

Policy Statement

2004-12-13

Visitor Services Board – Arts Community Representative

It shall be the policy of the Board of Selectmen that the position on the Visitor Services Board reserved by vote of Article 64 of the April 5, 1999 Annual Town Meeting for "one member from the Art community" shall be filled after inviting nominations from the following arts organizations in Provincetown: the Fine Arts Work Center, Provincetown Art Association & Museum, Cape Cod Pilgrim Memorial Association, Provincetown International Film Festival, Provincetown Theatre, Provincetown Arts Press, WOMR

Upon occurrence of a vacancy in the VSB position for a member from the Arts community, the Selectmen's secretary shall send written notice to said organizations inviting their nominations to be submitted within thirty days to the Board of Selectmen.

Adopted December 13, 2004

In favor: Mary-Jo Avellar, Sarah Peake, Michele Couture

Opposed: None

Updated August 11, 2008 to reflect changes in organizations.

In favor: Michele Couture, Mary-Jo Avellar, Elaine Anderson,

Austin Knight, David Bedard

Opposed: None

Policy Statement

2011-06-13 *(This Policy Supersedes 2004-11-29)*

Tourism Fund Expenditures

It shall be the policy of the Board of Selectmen that "All tourism budget commitments, with exception of payroll and related costs, require a vote of approval by the Visitor Services Board. The Visitor Services Board (VSB) may delegate authorization to the Tourism Director for individual expenditures under \$400 from the Coordination and Support budget allocation. All vouchers will include the tourism director's signature, as well as the date of the VSB vote of approval for the expenditure.

All grant awards will require approval by both the Visitor Services Board and the Board of Selectmen. All commitments must be compliant with procurement laws and regulations and may require approval by the Board of Selectmen."

Adopted: June 13, 2011

In favor: Anderson, Bedard, Knight, Santos, McChesney

Opposed: None

Doug Johnstone

From: Doug Johnstone
Sent: Wednesday, November 30, 2016 3:02 PM
To: Anthony Fuccillo
Subject: VSB Composition Info
Attachments: April 1997 STM Article 5.pdf; April ATM Article 64 - Replacing Municipal Advertising with Arts Communtiy Rep on VSB.pdf

Hi Tony – The VSB was created by the April 1997 Special Town Meeting vote on Article 5 (attached), which also determined the composition of the Board.

In 1999 the composition was amended by the April 1999 Annual Town Meeting vote on Article 64, which was submitted on the warrant as replacing the Municipal Advertising Committee rep with an at-large member **BUT**, a motion to amend was approved by the voters, which was to replace the MAC rep with an Arts Organization representative. Hunter O’Hanian, then Executive Director of the Fine Arts Work Center, was appointed as the Arts Organization representative in 1999.

Since “Arts Community” was not defined specifically in the Town Meeting vote from 1999, the Board of Selectmen defined the term when seeking applicants to fill the vacancy created when Hunter O’Hanian left the VSB. I include the link to the Board of Selectmen’s Policy Statement defining “Arts Community” <http://www.provincetown-ma.gov/ArchiveCenter/ViewFile/Item/5021> from 2004.

In order to change the representation on the VSB as currently defined, it would need to be approved by Town Meeting vote.

Let me know if you need any additional information.

dj

Roundtable Discussion Guide

Topic: Marketing

Attendees: BoS, VSB, Red Thread (Nadine), Tourism Director,
Town Staff

Recap of the new Branding & Marketing Effort

Topic Questions:

Branding & Marketing: What should our brand tell us?

- 1) What is our sense of the stability and success of our high season, now? in five years? What are the risks? To season ? To our funding ?
- 2) What does our branding & marketing do? supporting transactional commerce? sustaining the economy ? sustaining the town?
- 3) How do our branding & marketing efforts support the other seasons shoulder & off?
- 4) Can our branding strategy promote environmental awareness?
- 5) How can tourism & marketing support the community's goal of redeveloping our year-round economy with housing for all?
Or.... Can our brand strategy support both the tourist season and the community goals for developing a year-round economy with housing for all?
- 6) What then are our funding priorities? sustaining activities, growing new markets, growing into the shoulder seasons?

Measuring Success: What are the means by which the VSB will develop goals and set measures of the effectiveness of Town's marketing efforts?

- 1) What are the current sources data on how people learn about and make decisions to visit Provincetown?
- 2) How do we measure the success in reaching a stated goal like increasing visitors and tourist revenues in the shoulder season? What do the activities we have measured in annual report tell us?
- 3) For the upcoming survey, what do you see as the timeline and outreach efforts to collect information on where their guests come from?

Making Grants: Criteria & Conflicts

- 1) What are the criteria used to evaluate and make decisions on VSB Grants? Are there measures used to identify which grants might be most effective in meeting VSB goals? What feedback do you require from grantees as to find out if those goals were met?
- 2) What efforts do we make to ensure ethical compliance and thus community support ? (eg. MGL conflict of Interest laws)

Modifications: What about board composition or other changes that have been discussed?



Marketing, Advertising & Media Strategic Plan

Visitor Services Board & Office of Tourism

Contents



1. Marketing

- A. Unique Selling Proposition
- B. Target Customer
- C. Surveys & Statistics
- D. Promotion

2. Joint Ventures & Partnerships

3. Financial Projections

Executive Summary



- Marketing Provincetown is paramount - visitors have many domestic and international destinations choices
- Provincetown has been rated the most expensive New England seashore destination (Boston Business Journal) to visit
- Provincetown is in danger of being priced out of the market
 - ❖ Room rates have increased 25% over 5 years
 - ❖ The number of rooms has decreased annually, yet the income continues to increase
 - ❖ In 2015 the average licensed accommodation room brought in \$21,390 in revenue
 - ❖ Provincetown is in danger of being priced out of the market.
- Targeting the right audience is critical to sustaining the tourism economy

1. Marketing



A. Unique Selling Proposition (USP)

- LGBTQ Diversity Haven
- America's Oldest Continuous Art Colony
- Diverse Food Scene
- Boutique Shopping
- First Landing Place of the *Mayflower* Pilgrims
- Marine Economy
- Entertainment Variety
- Cape Cod National Seashore & Province Lands
- Dune Tours

1. Marketing



B. Target Customer

- LGBTQ men and women
- Food Travelers
- Destination Weddings
- Art Collectors
- Nightlife & Entertainment Traveler
- Cultural Travelers
- Eco-Tourism Travelers
- Meeting Planners
- Families

1. Marketing



C. Survey & Statistics

- Quarterly economic indicators report
- Comprehensive Visitor Survey

Considering this information we will update:

- Graphics
- Scripts
- Target Customer Focus
- Advertising Avenues & Vehicles
- Reevaluate allocation of funds

1. Marketing



D. Promotion

Branding

- The Provincetown Brand
- Logo & Tag Line

Materials

- Branded Ads
- Business Cards
- Graphics
- Trade Show Materials
- Brochures & Guides
- Website
- App
- Promotional Consumer Gifts
- Videos

1. Marketing



D. Promotion (cont'd)

Media

- Travel journalists
- FAM Trips

Advertising

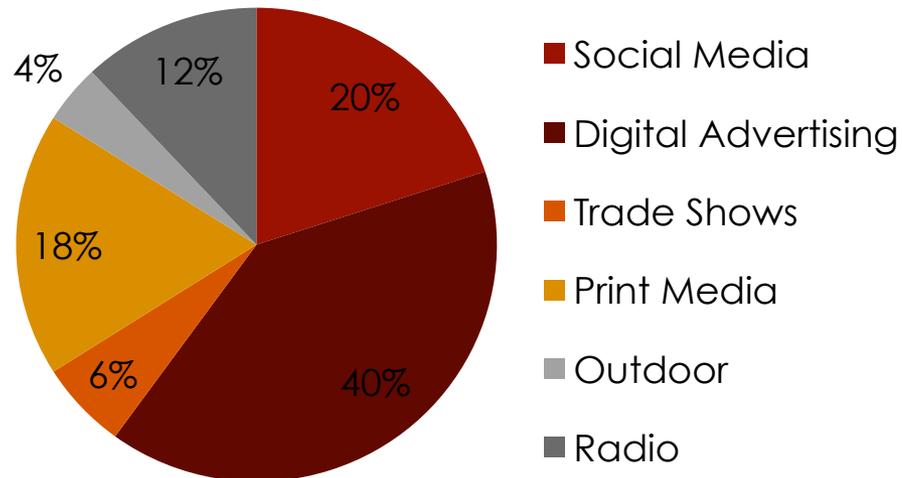
- Air Time
- Digital Advertising
- Geo-targeting
- Marketing Grants
- News Media
- News Releases
- Outdoor Advertising
- Print Media
- Social Media
- Trade & Consumer Shows

1. Marketing (cont'd)



D. Promotion (cont'd)

Advertising – Graph 1. Spending Strategy



1. Marketing (cont'd)



D. Promotion (cont'd)

Advertising – Online Marketing

1. **Search Engine Optimization** – content upload, updates, maintenance
2. **Paid Online Advertising** – retargeting, geo-targeting, geo-farming, geo-fencing
3. **Social Media** – utilize social media for organic and paid postings
4. **Hashtags**- #MyPtown, #SecondSummer

2. Joint Ventures & Partnerships



Local Partners

- Provincetown Chamber of Commerce
- Provincetown Business Guild
- Provincetown 400

Regional Partners

- Cape Cod Chamber of Commerce
- Greater Boston Convention & Visitors Bureau
- Plymouth 400, Inc.
- Mashpee Wampanoag Tribe

State Partners

- Massachusetts Office of Travel & Tourism
- Plymouth 400 Commission
- Massachusetts Society of Mayflower Descendants

National & International

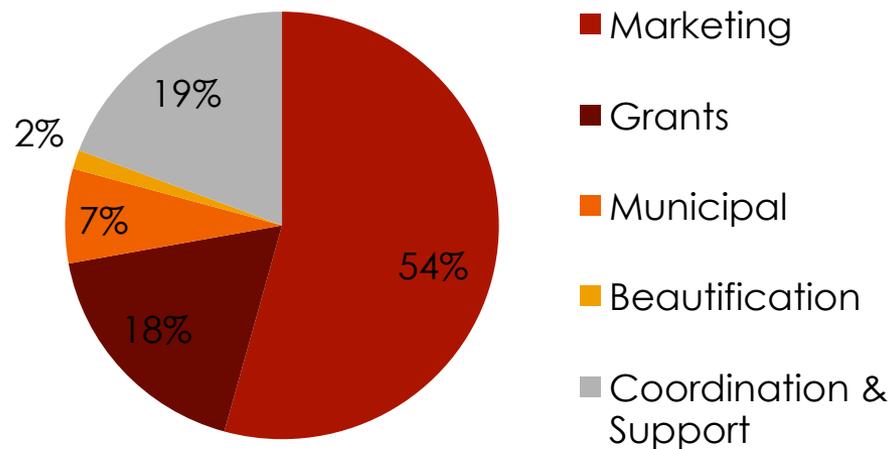
- Community Marketing Insights
- International Gay & Lesbian Travel Association
- U.S. Route 6 Tourist Association
- General Society of Mayflower Descendants

3. Financial Projections



The Five Year Plan will be drafted to execute the Marketing, Advertising and Media Strategic Plan

- Graph 2. Five Year-Plan Allocation of Funds

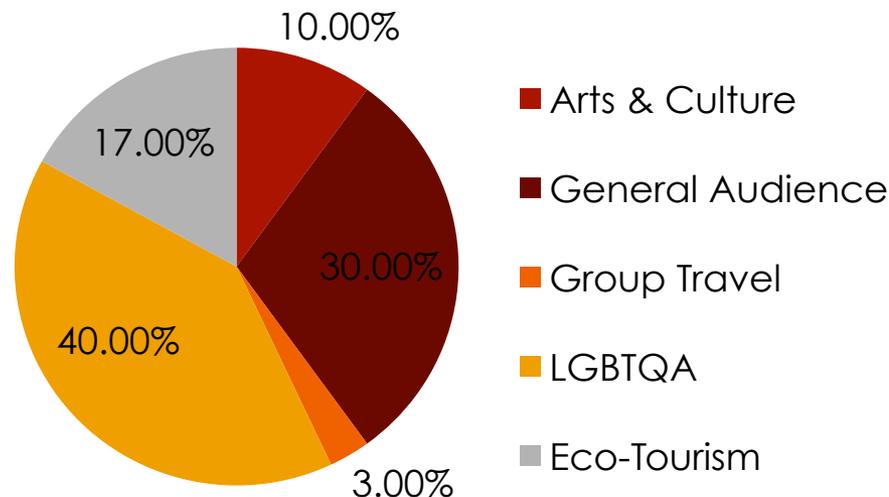


3. Financial Projections



The Five Year Plan will be drafted to execute the Marketing, Advertising and Media Strategic Plan

- Graph 3. Five-Year Plan Market Segments Allocation of Funds



PROVINCETOWN BRANDING PRESENTATION

June 12, 2017



www.redthread.nyc

PROJECT GOALS

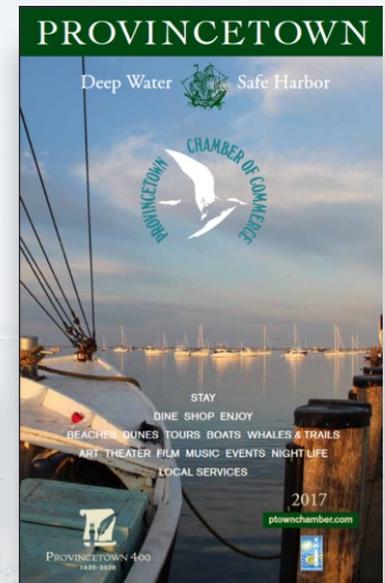
- Establish central brand positioning for Provincetown Tourism
- Develop a strategic marketing strategy to execute positioning
- Create a rich pool of content to deliver marketing messages

OUR PROCESS

- Immersion in local views
 - Interviews with key branding stakeholders across
 - Surveys and interviews from visitors and potential visitors
- Audit of existing marketing
 - Past/present brand strategies, advertising, print, web, social media, PR outreach
- Review of competitive landscape

CHALLENGES

- Decentralized Marketing, Fragmented Brand Messages, and Siloed Audience-Specific Campaigns



ACHIEVING SUCCESS

- Creativity, entrepreneurial thinking, and standing up for those you represent are all key values embedded in the DNA of Provincetown, and every member of this community is passionate in their sense of ownership and belonging and will fight for what they think is right.
- A great idea will not be enough to make this campaign a success, and no idea will meet every need of outreach or need of every stakeholder group.
- We must educate all stakeholders about what a tourism campaign can (and can't) do.

ACHIEVING SUCCESS

- Our creative strategy must ring true to all marketing stakeholders, speak to a broad audience, and focus on the core project goals of expanding audience, expanding the season, and expanding length of stays.
- Every aspect of this campaign will be scrutinized, and its execution and outreach strategy must meet Provincetown insiders' exacting standards for professionalism and design thinking.
- Ultimately, the success of a campaign for Provincetown will depend on how widely the brand is embraced and used by everyone working on behalf of Provincetown tourism.
- Insider buy-in will require a continued and effective process of communication and engagement that ensures all segments of the Provincetown community feel consulted, heard, informed.

COMPETITIVE LANDSCAPE

Great tourism campaigns capture the unique spirit of a place, its personality and energy. Then use that as a platform for presenting different aspects of the visitor experience, putting the visitor in the picture.

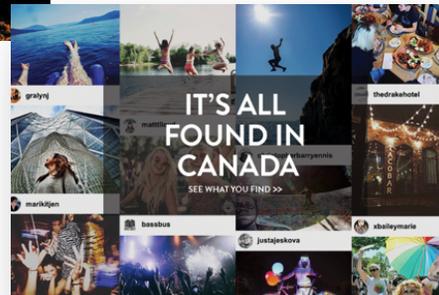
Capturing the Spirit of the Place...



- Real. Wild and Wonderful West Virginia (launched 2015)
- Las Vegas: What Happens Here, Stays Here (since 2003)
- Oregon: We Like It Here—You Might Too. (2016)
- Jamaica: Home of All Right (... "Drive Yourself Sane")



COMPETITIVE LANDSCAPE



- **Putting You in the Picture...**
- I ♥ NY (since 1977)
- The Maine Thing (...The Maine thing *is*...not needing GPS to know you're in exactly the right place, making it your life's work to trap something delicious)
- Alaska: B4UDIE (2005)
- Arizona: Your Story Starts HERE ("It starts with...")
- Canada: It's All Found in Canada / Keep Exploring
- Virginia is for Lovers (persistent since 1969)
- New Orleans: Follow Your NOLA (2015)
- Found in Miami (share your #FoundInMiami Moments)
- Ft. Lauderdale: HELLO Sunny (HELLO Good Life, HELLO groove thing ... includes LGBTQ-themed campaign launched this year)

BRAND POSITIONING

Provincetown is the quintessential American resort.

- Embodies Yankee “Can Do” spirit of self-reliance and individualism
- Posses a a unique mix of assets that no other place can boast
- Offers appeal to all segments of the visitor marketplace

BRAND ATTRIBUTES

- **Creative**

- Destination that offers a rich cultural landscape and a community of artists across mediums from visual, performance, film, literary, culinary, etc.

- **Natural**

- Unique location that is differentiated by unrivaled natural beauty. From dunes to harbors or bike trails to coves...It offers paradise.

- **Eclectic**

- Diverse community and spirit that embraces self-expression and inclusion.

BRAND MESSAGING PLATFORM

Provincetown is an iconic American town rich in **history, heritage** and **artistic expression**. It has always been a center of **enlightened thinking, creative exploration and revered natural resources**.

Together communities of various origins have come together in building a local culture that is embedded in **quintessential American ideals**. Residents and tourists have found a long-lasting sense of belonging that grounds them to this place unlike any other. One visit is all it takes to be caught up in the **beauty of the natural surroundings** and the **freedom of self-expression** which permeates each person's unique experience.

Provincetown is the place where everyone belongs.

PROVINCETOWN MESSAGE PLATFORM

OPTION 1

You Belong Here

Speaks to the eclectic diversity and open-mindedness that are core values of the Provincetown community. Reflects the history of seekers who have come to this unique place and made it their own - from the Pilgrims to artists and writers to the LGBTQ community to culinary and hospitality pioneers who are shaping Provincetown into a 21st century destination like no other.

- Offers an authentically personal, warm, and inviting promise
- Allows each word to work strategically
- Supports a broad range of use possibilities

PROVINCETOWN MESSAGE PLATFORM

OPTION 2

Find Yourself Here

Builds on Provincetown's long history of creating a safe space for people to find and be their true self. Whether it's exploring their creativity, engaging with new ideas at a party or in quiet reflection on a vastly beautiful beach, or engaging in experiences only imagined.

- Offers a call to action of a journey of personal discovery
- Evokes travel, adventure, identity
- Creates depth with simple play on words

DESIGN EXPLORATION

YOU
BELONG
HERE

The logo features the words 'YOU BELONG HERE' in a sans-serif font. The word 'YOU' is in a light grey color. 'BELONG' is in a bold purple font, with each letter containing a different photograph of people. 'HERE' is in a light grey color. The entire logo is centered between two horizontal purple lines.

Provincetown

YOU
BELONG
HERE

The logo features the words 'YOU BELONG HERE' in a sans-serif font. 'YOU' is in a light grey color. 'BELONG' is in a bold green font, with each letter containing a different photograph of nature. 'HERE' is in a light grey color. The entire logo is centered between two horizontal green lines.

Provincetown

YOU
BELONG
HERE

The logo features the words 'YOU BELONG HERE' in a sans-serif font. 'YOU' is in a light grey color. 'BELONG' is in a bold blue font, with each letter containing a different photograph of the ocean. 'HERE' is in a light grey color. The entire logo is centered between two horizontal blue lines.

Provincetown

YOU
BELONG
HERE

The logo features the words 'YOU BELONG HERE' in a sans-serif font. 'YOU' is in a light grey color. 'BELONG' is in a bold red font, with each letter containing a different photograph of people. 'HERE' is in a light grey color. The entire logo is centered between two horizontal red lines.

Provincetown

DESIGN EXPLORATION

ALTERNATE
WITH EMPHASIS ON "YOU"

YOU
BELONG HERE

Provincetown

YOU
BELONG HERE

Provincetown

YOU
BELONG HERE

Provincetown

YOU
BELONG HERE

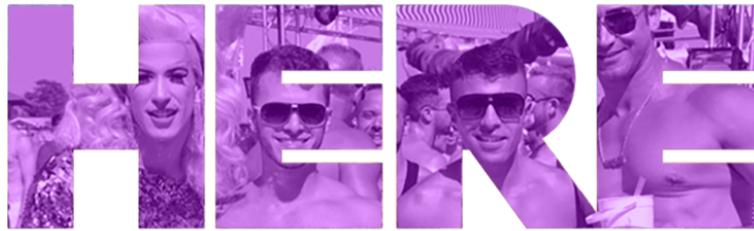
Provincetown

DESIGN EXPLORATION

[Click here for motion sample](#)

ALTERNATE
WITH EMPHASIS ON "HERE"

YOU BELONG



Provincetown

YOU BELONG



Provincetown

YOU BELONG



Provincetown

YOU BELONG



Provincetown

DESIGN EXPLORATION

MAP-INSPIRED WATERCOLOR:



DESIGN EXPLORATION

COMBINATION EXAMPLE:

YOU
BELONG
HERE



Provincetown



DESIGN EXPLORATION

MORE ABSTRACT WATERCOLOR MARK WITHOUT A MAP PIN



COMBINATION EXAMPLE:



DESIGN EXPLORATION

USING THE PILGRIM MONUMENT AND CLEAN TYPE TREATMENT

PROVINCETOWN

COMBINATION EXAMPLE:

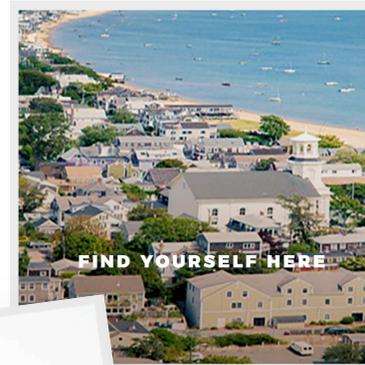
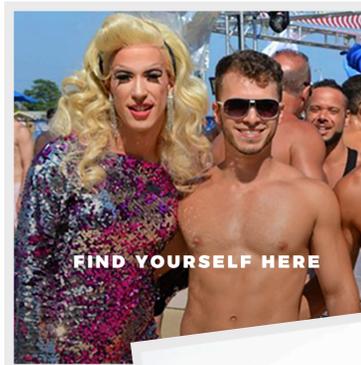
YOU BELONG



PROVINCETOWN

DESIGN EXPLORATION

USING A "SOCIAL MEDIA" ABSTRACT FRAMING DEVICE



DESIGN EXPLORATION

TRADITIONAL EXPLORATIONS USING THE MONUMENT ICON



THANK YOU.

June 12, 2017



www.redthread.nyc

TOURISM & ECONOMIC ACTIVITY REPORT

SUMMER - FALL 2016



CONTENTS:

1. 2016 Overview

2. Economic indicators:

- A.** Airport
- B.** Cape Cod National Seashore Park
- C.** Embarkation Fees
- D.** MA Sales Tax Collected
- E.** Meals Tax Revenue & Spent on Meals
- F.** Parking Revenue
- G.** Pilgrim Monument and Provincetown Museum
- H.** Ridership CCRTA
- I.** Room Tax Revenue & Spent on Rooms
- J.** Water & Sewer

3. \$ Spent in Provincetown (Meals, Rooms & Other)

4. Summary

1. 2016 OVERVIEW:

2016 Season Trends

- ❖ The first half of calendar year 2016 is up 14% in meals tax and up 5% in rooms tax collected
- ❖ While the number of rooms has decreased by 5.5% over the past 5 years, the average room income has increased by 20%
- ❖ Ferry use increased substantially (+20%), while judging by parking lot use, automobile travel appears flat
- ❖ Overall, the indicators show that the season was good for restaurants, attractions and the majority of accommodations, art galleries and higher end retail shops

2. ECONOMIC INDICATORS:

A. Airport

BOS – PVC 2015 Jan - Aug:
7,183 passengers

BOS – PVC 2016 Jan - Aug:
6,960 passengers

For the last 4 months of the CY we need **3,512** passengers, or roughly 30 passengers / a day, to meet last year's figure

PVC Passenger Enplanements

2015	PVC-BOS	PVC-HPN	TOTAL
JAN =	290	0	290
FEB =	162	0	162
MAR =	253	0	253
APR =	374	0	374
MAY =	647	0	647
JUN =	923	15	938
JUL =	2173	86	2259
AUG =	2361	164	2525
SEP =	1519	41	1560
OCT =	859	0	859
NOV =	541	0	541
DEC =	370	0	370
TOTAL =	10,472	306	10,778

PVC = Provincetown
BOS = Boston
HPN = White Plains, NY.

PVC Passenger Enplanements

2016	PVC-BOS	PVC-HPN	TOTAL
JAN =	368	0	368
FEB =	204	0	204
MAR =	312	0	312
APR =	375	0	375
MAY =	534	0	534
JUN =	866	5	871
JUL =	1991	80	2071
AUG =	2310	87	2397
SEP =			
OCT =			
NOV =			
DEC =			
TOTAL =	6960	172	7132

PVC = Provincetown
BOS = Boston
HPN = White Plains, NY.

2. ECONOMIC INDICATORS:

B. Cape Cod National Seashore Park – Traffic Count

Herring Cove	YTD	Growth Yr/Yr
2016	263,878	6.41%
2015	247,971	3.05%
2014	255,773	

Race Point	YTD	Growth Yr/Yr
2016	119,554	0.10%
2015	117,550	3.09%
2014	121,304	

Visitor Center	YTD	Growth Yr/Yr
2016	72,202	9.60%
2015	65,850	6.00%
2014	62,124	

2. ECONOMIC INDICATORS:

B. Cape Cod National Seashore Park – Traffic Count

1. Herring Cove Beach

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	%
2016	6,940	10,715	18,180	16,766	21,130	43,821	76,276	70,050	36,128					
2015	6,902	2,200	0	16,500	18,900	41,161	88,963	73,345	36,100	18,378	9,884	9,657	321,990	.67%
2014	8,995	5,535	12,408	16,630	22,060	47,499	71,323	71,323	35,899	11,114	9,544	7,509	319,839	

2. Race Point Beach

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	%
2016	2,495	2,653	5,430	10,492	14,108	17,036	30,283	37,057	10,654					
2015	2,220	920	2,500	10,500	14,720	16,990	29,700	40,000	10,700	12,829	4,218	3,047	148,344	-4.61%
2014	2,741	923	5,970	10,777	14,720	16,760	30,620	38,793	10,657	15,970	3,786	3,800	155,517	

3. Provincetown Visitor Center

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	%
2016	522	659	1,850	6,113	8,651	11,642	21,055	21,710	11,480					
2015	509	60	600	5,000	7,027	9,154	21,600	21,900	16,842	7,595	2,866	2,373	95,526	10.7%
2014	628	62	1,940	4,162	7,040	11,628	20,309	16,355	14,836	4,538	2,641	2,158	86,296	

2. ECONOMIC INDICATORS:

C. 1. Embarkation Tax Revenue (Ferries)

- ◆ Number of visitors arriving by ferry was up **20%** in FY16 / FY15
- ◆ **20,000** passengers more in 2016

Embarkation	Q1	Q2	Q3	Total	Passengers	% Growth
Receipts for	Jul – Sep	Oct – Dec	Feb - Apr			
FY 2016	\$15,546	\$19,441.5	\$1,567	\$36,555	73,110	20.15%
FY 2015	\$18,795.5	\$11,025.72	\$602.90	\$30,424	60,848	5.10%

\$.50 / passenger

2. ECONOMIC INDICATORS:

C. 2. Embarkation Tax Revenue (Whale Watch)

◆ FY2016 is the first year data was collected

Embarkation	Q1 Jul – Sep '15	Q2 Oct – Dec '15	Q3 Jan – Mar '16	Q4 Apr – Jun '16	Total	People	
	Jul-Sep 15	Oct-Dec 15	Jan-Mar 16	Apr-June	Total	Total	% Growth
FY 2016	\$31,281	\$8,497	\$0	\$3,875	\$43,653	87,306	N/A

2. ECONOMIC INDICATORS:

D. Massachusetts State Tax Collected*

\$ Spent on Retail in fiscal years 2010 - 2014: **+10%**

	Total	Count	%Δ
FY 2014	\$2,562,868	304	2.5%
Spending:	\$41,005,888		
FY 2013	\$2,499,884	299	14.6%
Spending:	\$39,998,144		
FY 2012	\$2,181,561	300	0.2%
Spending:	\$34,904,976		
FY 2011	\$2,175,344	303	-6.1%
Spending:	\$34,805,504		
FY 2010	\$2,316,835	296	
Spending:	\$37,069,360		

*excluding national chains



2. ECONOMIC INDICATORS:

E. Meals Tax Revenue & Spent on Meals in CY 2016, January thru July

1. Receipts in the first half of 2016 were up **14%**
2. First Light Event caused an increase in receipts in Q3 of FY16

MEALS TAX	Collected	Spent	% Growth Yr/Yr
Feb – July 2016	\$309,048	\$41,2016,400	13.88%
Feb – July 2015	\$271,357	\$36,180,933	7.56%
Feb – July 2014	\$252,276	\$33,636,800	

2. ECONOMIC INDICATORS:

E. Meals Tax Revenue & Spent on Meals

1. Receipts in FY2016 were up **5.3%** over FY2015
2. Receipts in Q1 FY17 (May-Jul) were up **9.7%** over Q1 in FY16

MEALS TAX	Q1 May - July	Q2 Aug - Oct	Q3 Nov - Jan	Q4 Feb - Apr	Total	Spent on Meals	Spent on Meals In Q1	% Growth
FY 2017	\$274,806	\$262,238	\$40,816				\$36,640,000	9.7%*
FY 2016	\$250,428	\$260,733	\$37,410	\$34,242	\$582,812	\$77,708,400	\$33,390,400	5.33%
FY 2015	\$234,552	\$252,871	\$30,095	\$35,808	\$553,326	\$73,138,227	\$31,273,564	5.2%
FY 2014	\$224,910	\$232,972	\$31,350	\$36,805	\$526,037	\$70,138,227	\$29,987,981	

Meals Tax = .75%

*to-date, Q1 2016 over Q1 2015

2. ECONOMIC INDICATORS:

F. Parking Revenue and Count

- ◆ Parking revenue appears to be flat over 2015
- ◆ 2015 saw a **12%** increase over 2014

METRIC NAME	MPL	Grace Hall	Kiosks	Meters	Total	% Growth Yr / Yr
2016**	\$1,082,135	\$428,802	\$275,714	\$21,906	\$1,808,557	0.38%
2015**	\$1,101,354	\$407,499	\$272,244	\$20,448*	\$1,801,545	12.36%
2014	\$1,097,102.25	\$365,250.75	\$235,800	\$44,855	\$1,743,008	-9.86%
2013	\$956,153	\$355,120	\$217,950.80	\$49,339.22	\$1,933,753	

** Free month of April; rates increased May 2015

* Shift to automated kiosks

2. ECONOMIC INDICATORS:

G. Pilgrim Monument and Provincetown Museum

PMPM visitors	Q1 Jan - Mar	Q2 Apr - Jun	Q3 Jul - Sep	Q4 Oct - Dec	Total	% Growth
2016	8	33,272	57,907	11,700*	102,887*	0.5%
2015	8	30,814	60,608	10,963	102,393	8.48%
2014	5	28,489	56,261	9,631	94,386	3.64%
2013		27,188	54,542	9,337	91,067	

*Projected

2. ECONOMIC INDICATORS:

H. Ridership Data for the Provincetown Shuttle and the Flex Route

1. Flex numbers are up possibly due to longer commutes
2. Shuttle numbers are down; beach access fares may explain the trend; this requires further research for its impact on seasonal workforce

Year	Flex Jun - Aug	Growth	Provincetown / Truro Shuttle	Growth
2016	47,799	9.00%	91,766	12%
2015	43,856		80,883	

2. ECONOMIC INDICATORS:

I. Room Tax Revenue & Spent on Rooms in CY 2016

1. Receipts for the first half of 2016 are up 5% over 2015
2. First Light Provincetown caused an increase in receipts in Q3 of FY16

ROOMS TAX	Collected	Spent	% Growth Yr/Yr
Feb – July 2016	\$1,015,980	\$16,933,000	4.65%
Feb – July 2015	\$970,821	\$16,180,349	3.76%
Feb – July 2014	\$935,625	\$15,593,750	

2. ECONOMIC INDICATORS:

I. Room Tax Revenue & Spent on Rooms

◆ Our rate of growth is slowing down

State Room Tax = 5.7%
Local Option Tax = 6%
Total Room Tax = 11.7%

ROOM TAX	Q1 May - July	Q2 Aug - Oct	Q3 Nov - Jan	Q4 Feb - Apr	Agg	Spent on Rooms	Spent on Rooms in Q1	% Growth
FY 2017	\$904,588	\$974,980	\$122,425				\$15,076,467	4.7%*
FY 2016	\$863,927	\$1,014,238	\$92,980	\$111,392	\$2,082,537	\$33,708,950	\$14,398,783	5.16%
FY 2015	\$849,508	\$942,922	\$80,944	\$106,894	\$1,980,268	\$33,004,459	\$14,158,466	6.9%
FY 2014	\$803,236	\$870,207	\$82,101	\$96,341	\$1,851,886	\$30,864,759	\$13,387,263	6.20%

*to-date, Q1 2016 over Q1 2015

2. ECONOMIC INDICATORS:

Room trends in Provincetown

- ◆ The number of rooms has decreased by **5.5%** over the past 5 years
- ◆ The average room income has increased by **20%** over the past 5 years

FY	SPENT ON ROOMS	%	# OF ROOMS COLLECTING ROOM TAX	AVERAGE ROOM INCOME	% Growth Room Income
2017	\$33,366,550*		1,509	\$21,783*	1.83%*
2016	\$33,502,200	1.51%	1,538	\$21,783	1.83%
2015	\$33,004,459	7.00%	1,543	\$21,390	7%
2014	\$30,864,759	10.00%	1,545	\$19,977	10.2%
2013	\$28,949,593	6.00%	1,597	\$18,127	

* Collected in May 2016 – Jan 2017 only

* Projected

2. ECONOMIC INDICATORS:

◆ Room trends in Provincetown

FY	SPENT ON ROOMS IN Q1	%	# OF ROOMS COLLECTING ROOM TAX	% Growth
2017	\$15,076,467	4.7%	1,509	-1.9%
2016	\$14,398,783		1,538	

* Collected in May, June, July 2016 only

2. ECONOMIC INDICATORS:

J. 1. Water billed

	2013	2014	2015	2016
	Billable	Billable	Billable	Billable
JAN	6,969,000	7,328,000	7,855,000	7,632,000
FEB	7,114,000	6,634,000	8,264,000	6,958,000
MAR	7,745,000	7,876,000	7,236,000	7,225,000
APR	9,663,000	9,108,000	9,121,000	9,967,000
MAY	16,800,000	16,058,000	16,330,000	15,058,000
JUN	18,404,000	20,656,000	20,209,000	21,544,000
JUL	31,629,000	31,337,000	30,660,000	32,484,000
AUG	28,737,000	33,003,000	33,991,000	32,978,000
SEP	21,696,000	19,147,000	21,495,000	20,067,000
OCT	13,559,000	13,594,000	14,176,000	
NOV	9,401,000	9,253,000	7,993,000	
DEC	6,900,000	8,108,000	6,718,000	
TOTAL	178,617,000	182,102,000	184,048,000	153,913,000 *

Year over year increase

Water	Total Billable	Growth	YTD	YTD Growth %
2016	153,913,000*	1.2%*	153,913,000	4.2%
2015	184,048,000	1.06%	147,723,400	2.2%
2014	182,102,000	1.95%	151,147,000	1.6%
2013	178,617,000	*to-date	148,757,000	

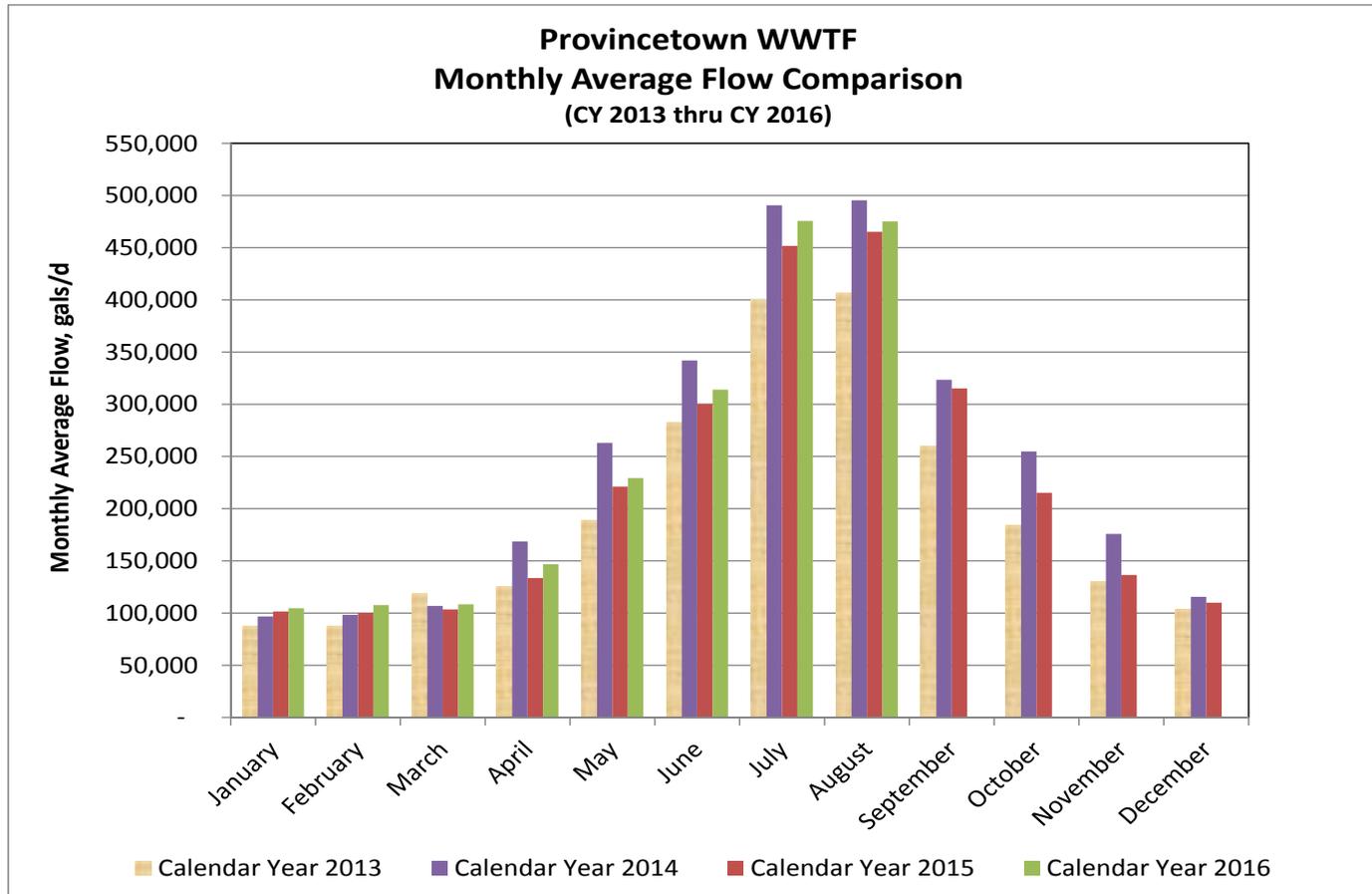
2. ECONOMIC INDICATORS:

J. 2. 2013 – 2016 Solid Waste

Solid Waste Tonnage	MSW	Single Stream	MSW % Growth	Single Stream % Growth
2016 to-date	1,927.86*	1,042.14*		
2015	2,801.74	1,352.84	5.44%	14.68%
2014	2,657.14	1,179.61	-8.31%	9.47%
2013	2,898.02	1,077.53		

2. ECONOMIC INDICATORS:

J. 2. Solid Waste – Monthly Average Flow Comparison CY2013 – CY2016



WHERE DOES PROVINCETOWN STAND COMPARED TO OTHER NEW ENGLAND COASTAL TOWNS?

Average rate for the cheapest available room July 1 – August 31, 2015?

1. Provincetown (MA) \$247
2. Kennebunkport (ME) \$234
3. Newport (RI) \$226
4. Chatham (MA) \$225
5. Portland (ME) \$223
6. Boston (MA) \$213
7. Cambridge (MA) \$207
8. Martha's Vineyard (MA) \$189
9. Ogunquit (ME) \$187
10. Falmouth (MA) \$164

A red rectangular box with a white diagonal line pattern. The text "BOSTON BUSINESS JOURNAL" is centered in white, with "BOSTON" on the top line and "BUSINESS JOURNAL" on the bottom line.

BOSTON
BUSINESS JOURNAL

For the full rankings of the survey, visit:

<http://www.cheaphotels.org/press/newengland2015.html>

Press Contact: Barbara Adams, press@cheaphotels.org; Phone: 1-805-308-9660

3. \$ SPENT IN PROVINCETOWN

\$ Spent on Meals, Licensed Rooms and Retail in FY 2010 – 2014 is **+20%**

Year	Meals	Rooms	Retail Sales	Total	%Δ
2014	\$70,138,227	\$30,864,759	\$41,005,881	\$142,008,867	3.52%
2013	\$68,227,404	\$28,949,593	\$39,998,146	\$137,175,143	10.07%
2012	\$62,456,083	\$27,265,311	\$34,904,973	\$124,626,367	4.99%
2011	\$58,606,400	\$25,293,300	\$34,805,508	\$118,705,208	0.86%
2010*	\$56,000,000	\$24,629,500	\$37,069,361	\$117,698,861	

* Estimated Meals Tax

4. SUMMARY:

- ◆ Tourism in Provincetown is a \$200,000,000+ million industry annually
- ◆ 2015 was a banner year – Best in recorded history; 2016 over 2015 numbers are leveled or up in most cases
- ◆ Provincetown #1 Most Expensive Coastal New England Town by Boston Business Journal
- ◆ Average revenue per room is increasing, while number of licensed rooms is decreasing – higher rates and/or increase in occupancy
- ◆ The room tax revenue growth rate is decreasing, but we are still experiencing growth
- ◆ Increase in fast ferry daytrip visitation
- ◆ Eco-tourism and attractions are going strong
- ◆ Accolades, Awards & Recognitions galore



Growth Management Round Table

Preliminary Findings: Implications for Growth Management Policy

Conducted by:

The Public Policy Center at UMass Dartmouth

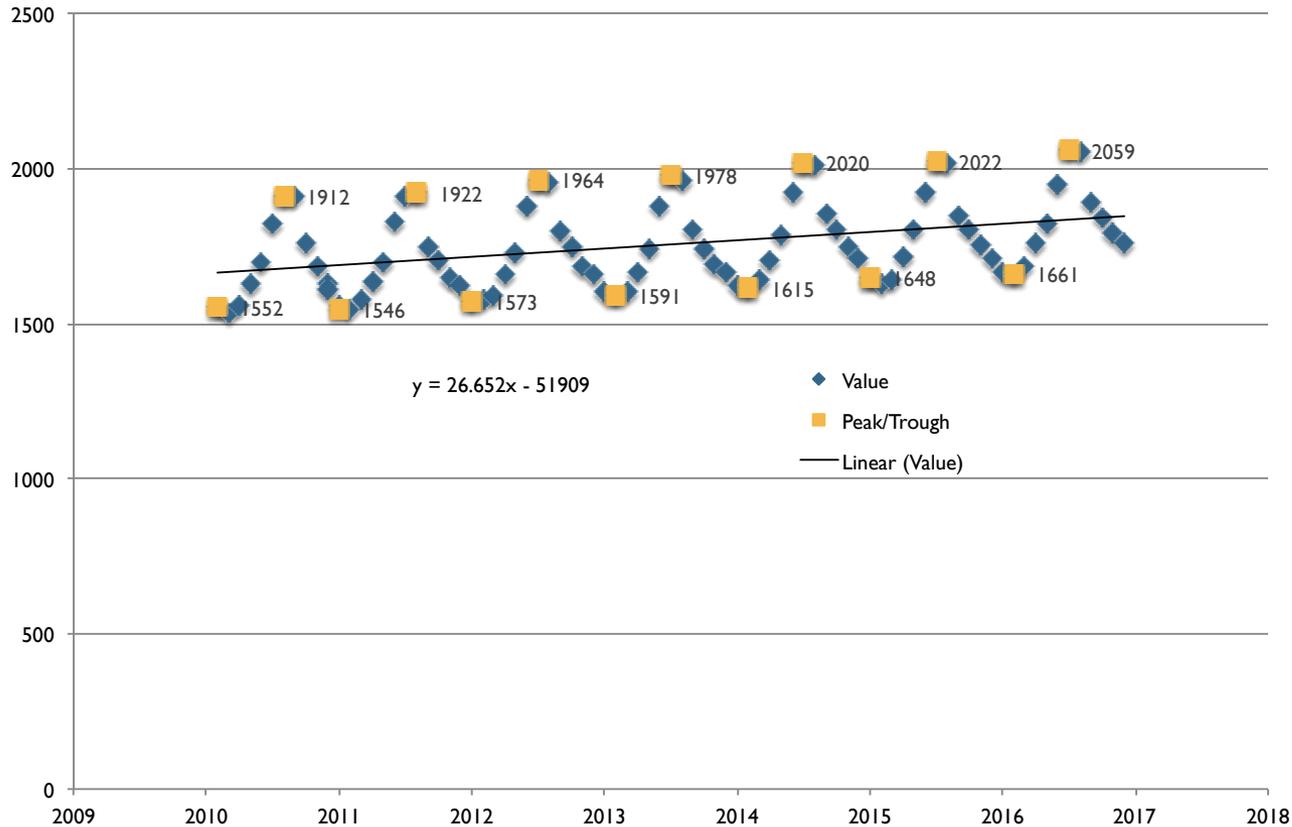
Michael Goodman, PhD; Elise Korejwa, MS, MPP; Michael McCarthy, MPP;
Joy Smith, MPP Candidate

February 16, 2016



Economic Base

Monthly Employment, Provincetown, 2010 - 2017

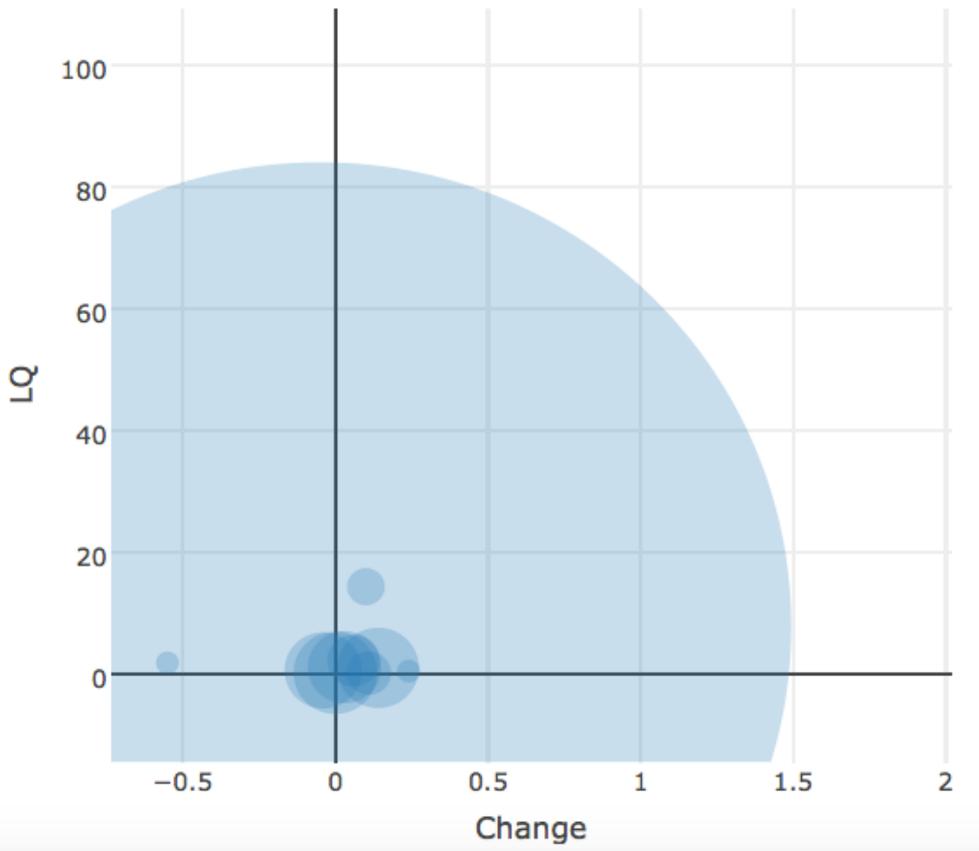


Source: MA EOLWD LAUS



Economic Base

Traded Clusters, Provincetown, 2010 - 2015



Source: EMSI

Cluster	2015 Jobs	2015 LQ	Percent Change from 2010
Hospitality and Tourism	451	7.86	-5%
Business Services	40	0.24	0%
Financial Services	39	1.05	14%
Education and Knowledge Creation	37	0.64	-4%
Marketing, Design, and Publishing	35	1.17	3%
Performing Arts	25	2.25	6%
Distribution and Electronic Commerce	21	0.20	11%
Fishing and Fishing Products	18	14.39	10%
Information Technology	11	0.51	24%
Video Production and Distribution	11	1.88	-55%

Source: EMSI



Economic Base

Growing Industries, Provincetown & Barnstable County, 2010 - 2015

Provincetown			Barnstable County		
Industry	Jobs Gained	Percent Change	Industry	Jobs Gained	Percent Change
Health Care Services, Other	84	110%	Social Services	722	77%
Specialty Food Stores	13	81%	Dept. Stores	373	56%
Outpatient Care Centers	9	38%	Public Higher Education	431	45%
Domestic Services	7	25%	Domestic Services	849	26%
Accommodations	36	18%	Other Recreation	398	19%
Grocery Stores	19	17%	Grocery Stores	623	16%
Other Personal Services	7	16%	Residential Construction	287	13%
Misc. Retail	7	15%	Restaurants	1,118	11%
Other Recreation	11	11%	Accommodations	253	8%
Restaurants	42	10%	Local Education	313	6%

Source: EMSI



Economic Base

Shrinking Industries, Provincetown & Barnstable County, 2010 - 2015

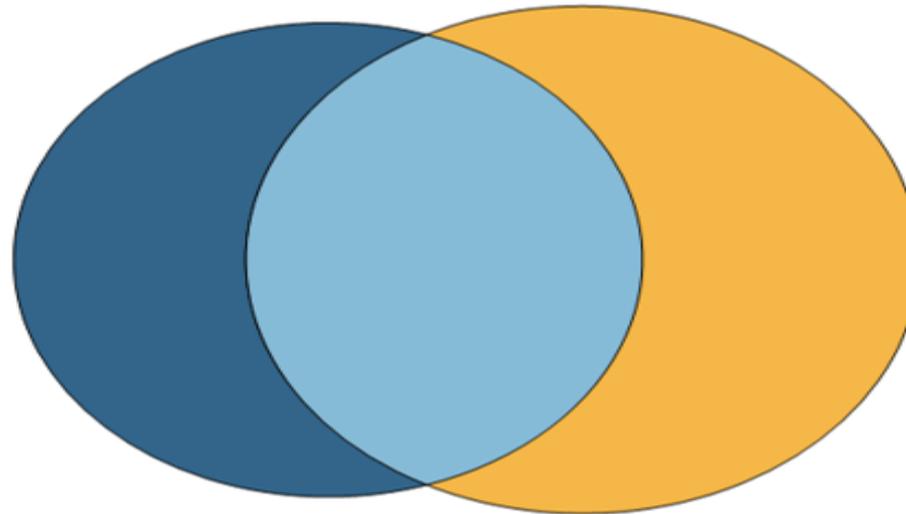
Provincetown			Barnstable County		
Industry	Jobs Lost	Percent Change	Industry	Jobs Lost	Percent Change
Rooming Houses	18	-68%	Household Assistance	445	-40%
Land Sightseeing	11	-54%	Clothing Stores	387	-27%
Support for Water Transport	8	-53%	Book, Directory, News Publishing	180	-27%
Drinking Places	126	-51%	Vocational Rehab Services	180	-23%
Video & Recording	13	-41%	Office Supplies & Gift Stores	151	-18%
Household Assistance	11	-40%	Federal Government, Civilian	233	-12%
Office Supplies & Gift Stores	15	-21%	Home Health Care Services	187	-11%
Skilled Nursing Facilities	6	-10%	Skilled Nursing Facilities	244	-10%
Federal Government, Civilian	4	-10%	Scientific R&D Services	125	-9%
Clothing Stores	6	-8%	Federal Government, Military	92	-7%

Source: EMSI



Commuting Patterns

Provincetown Commuting Inflows and Outflows, 2014



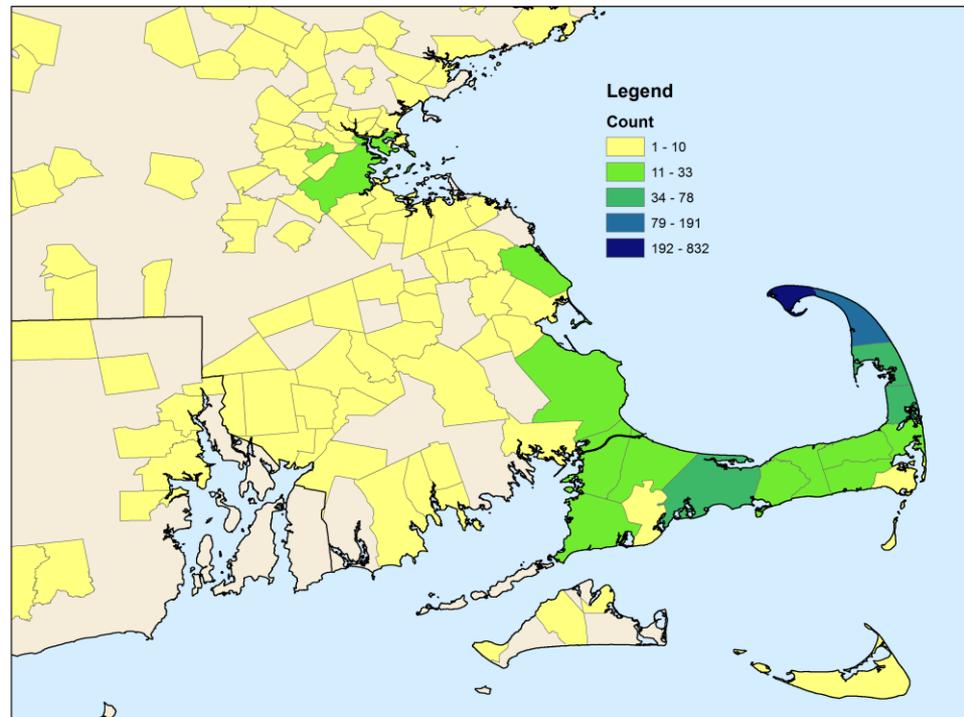
- 676– Living in Area, Working Outside
- 896 – Employed in Area, Living Outside
- 832– Employed and Living in Area

Source: LEHD LODES



Commuting Patterns

Where Provincetown's Workers Live, 2014

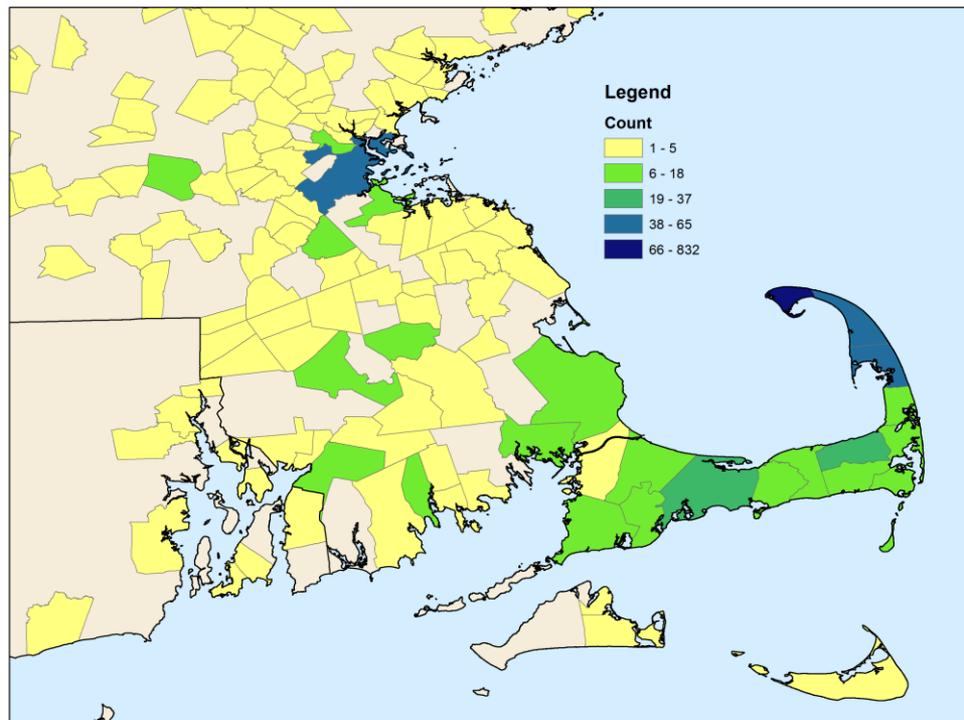


Source: LEHD LODES



Commuting Patterns

Where Provincetown's Residents are Employed, 2014

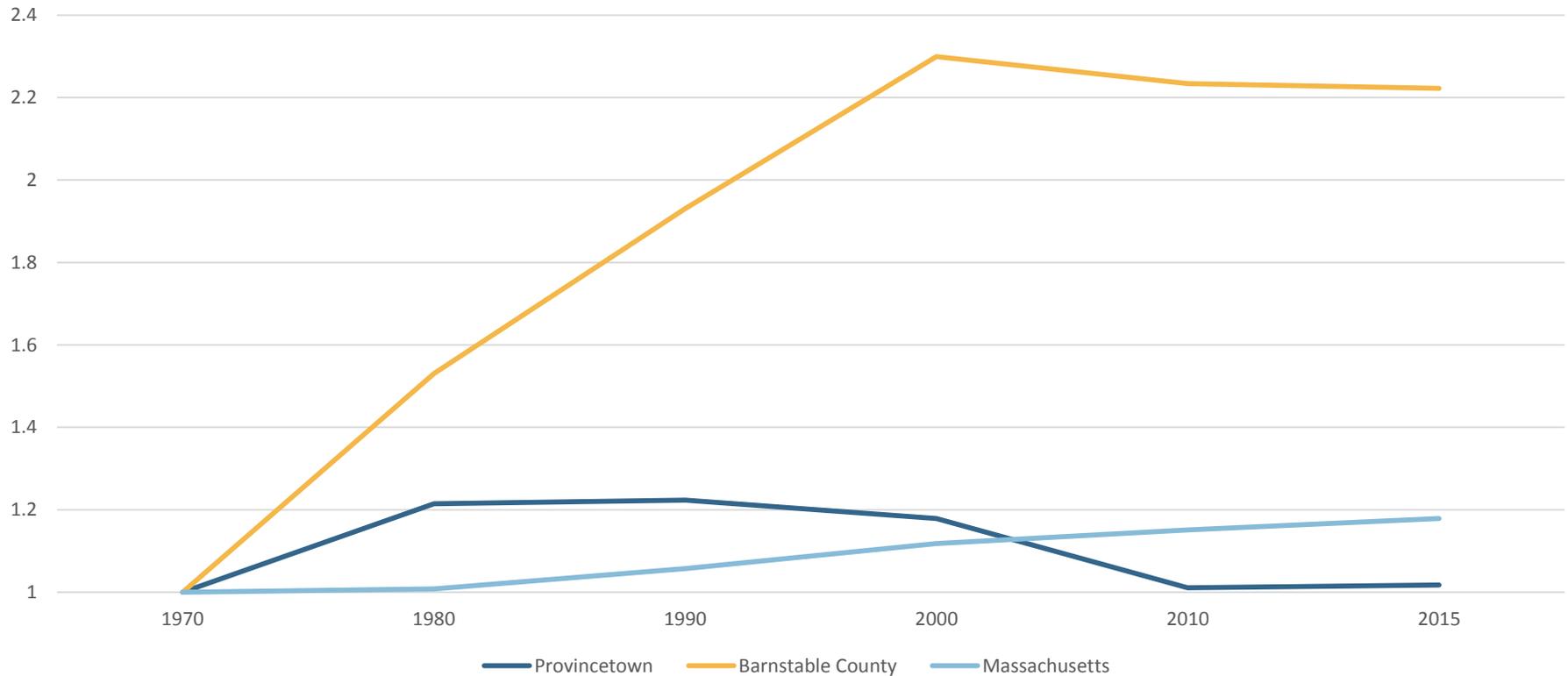


Source: LEHD LODES



Demographics

Population Indexed to 1970

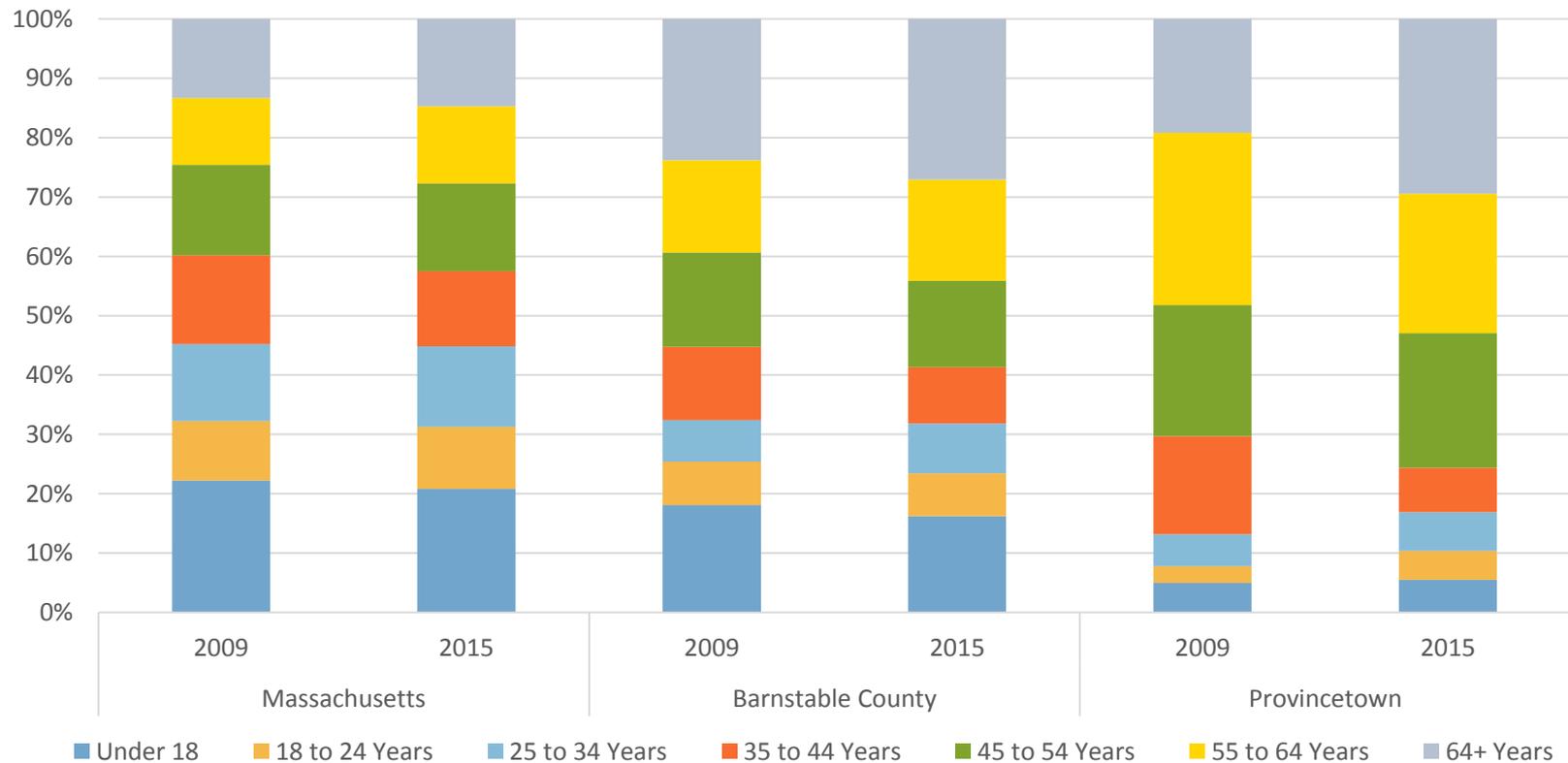


Source: 1970-2010 U.S. Census Bureau Summary File 1, 2011-2015 ACS 5-Year Estimates



Demographics

Age Cohorts to 2009 to 2015



Source: 2009 ACS 5-year estimates, 2015 ACS 5-year estimates



Demographics

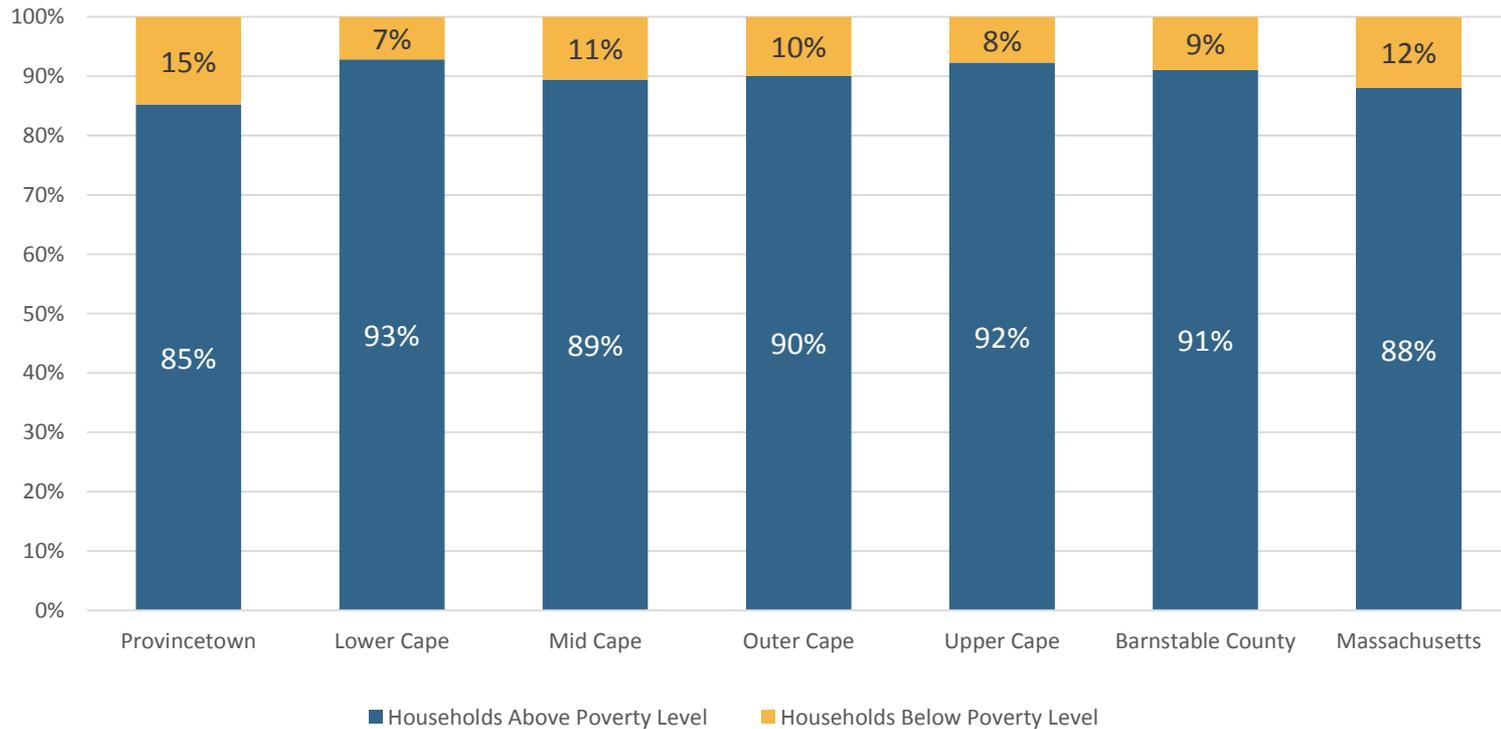
Per Capita Income, 2000 to 2015, Adjusted for Inflation					
Municipality	2000	2009	2015	% Change 2000 to 2009	% Change 2009 to 2015
Provincetown	\$35,937	\$43,125	\$42,918	20.0%	-0.5%
Lower Cape	\$35,384	\$41,351	\$41,898	16.9%	1.3%
Mid Cape	\$34,054	\$36,552	\$36,120	7.3%	-1.2%
Outer Cape	\$34,292	\$43,252	\$38,559	26.1%	-10.9%
Upper Cape	\$35,546	\$38,039	\$37,367	7.0%	-1.8%
Barnstable County	\$34,848	\$38,311	\$37,678	9.9%	-1.7%
Massachusetts	\$35,721	\$36,920	\$36,895	3.4%	-0.1%

Source: 2000 Census, 2005-2009 ACS 5-Year Estimates, 2011-2015 ACS 5-Year Estimates



Demographics

Household Poverty, 2015

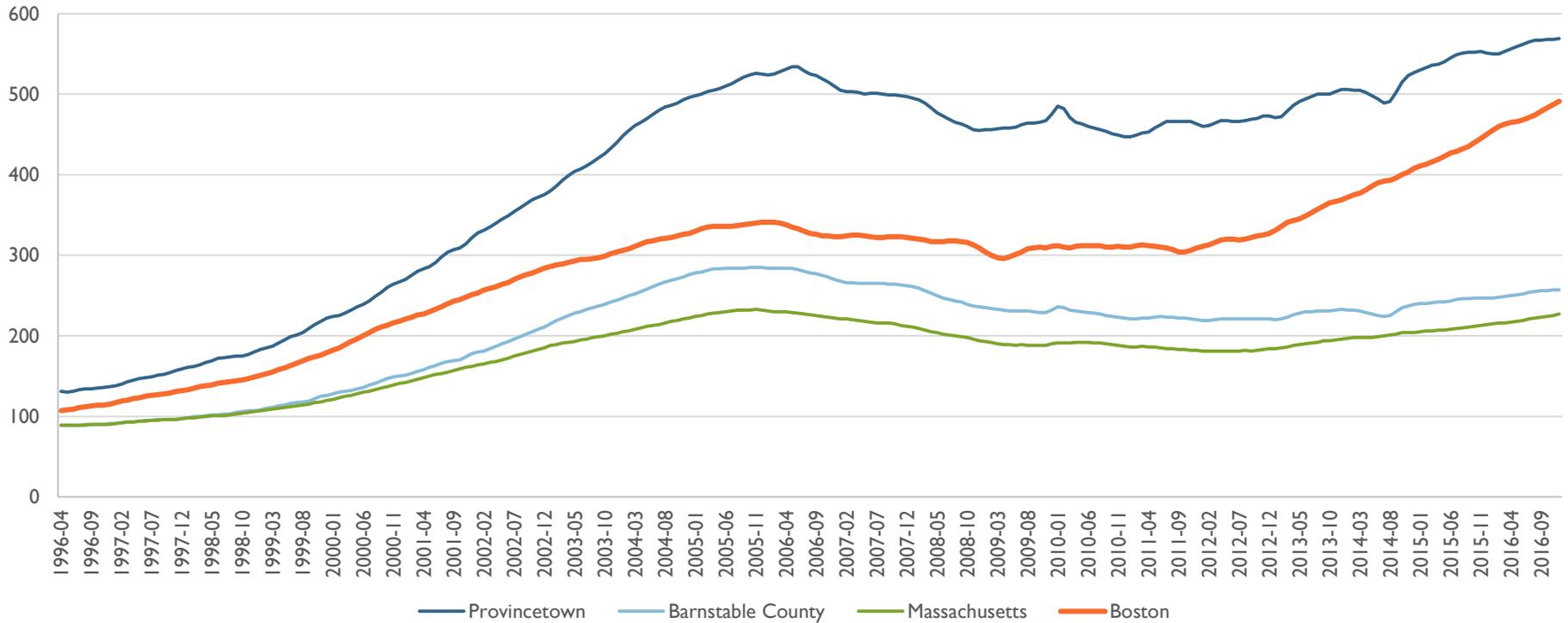


Source: 2015 ACS 5-year estimates



Housing

Median Home Price per Square Foot, 1996-2016



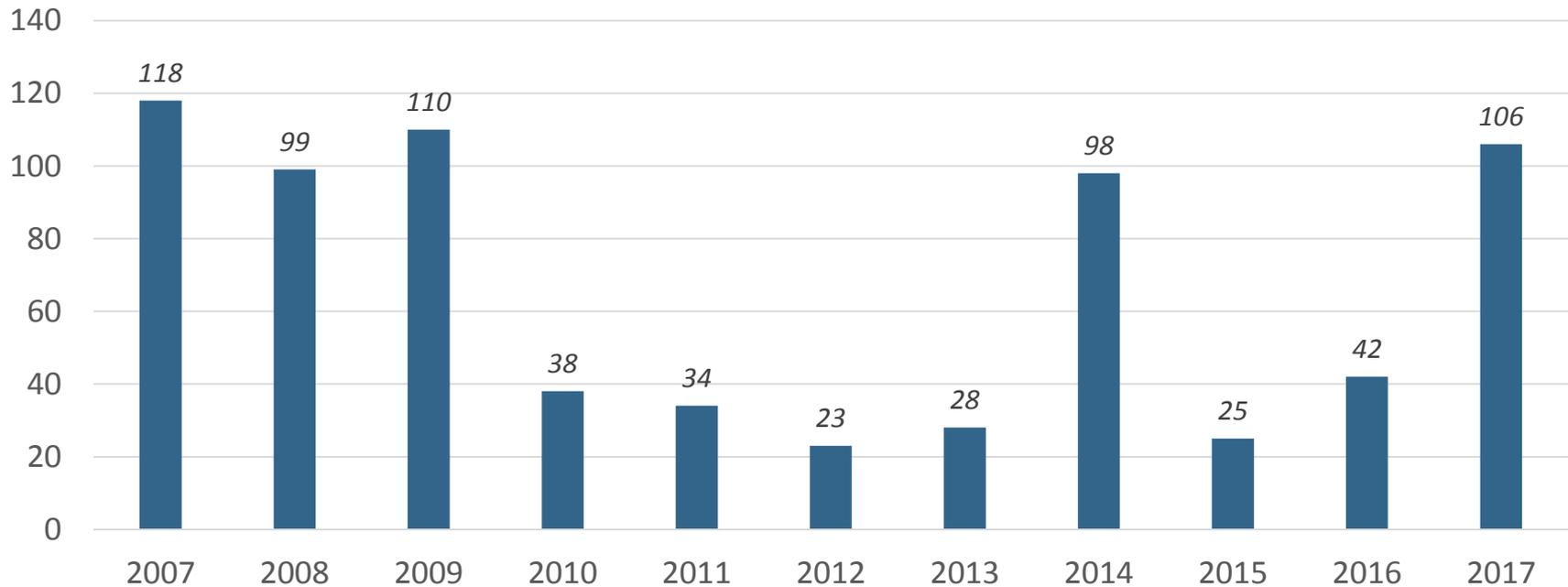
Source: Zillow Home Value Index



Housing

Since 2007, there have been 721 condo conversions.

Condo Conversions in Provincetown
FY2007-FY2017



Source: Town of Provincetown



Housing

Seasonal and Year Round Housing Units, 2010 - 2015

	2010			2015		
	All units	Seasonal	Year Round	All Units	Seasonal	Year Round
Provincetown	4,478	51.7%	42.6%	4,517	55.6%	39.5%
Outer Cape	17,730	57.5%	39.1%	18,176	62.0%	35.4%
Lower Cape	29,833	42.0%	54.1%	30,232	45.4%	50.9%
Mid Cape	59,728	30.1%	65.7%	60,236	33.7%	61.7%
Upper Cape	51,547	27.1%	69.6%	52,667	28.9%	67.2%
Boston	270,470	0.6%	90.9%	278,521	1.1%	92.0%
Mass.	2,786,077	4.0%	90.2%	2,827,820	4.4%	90.2%

Source: 2006-2010 & 2011-2015 American Community Survey 5-Year Estimates



Housing

Cost Burdened Rental Households, 2010 - 2015

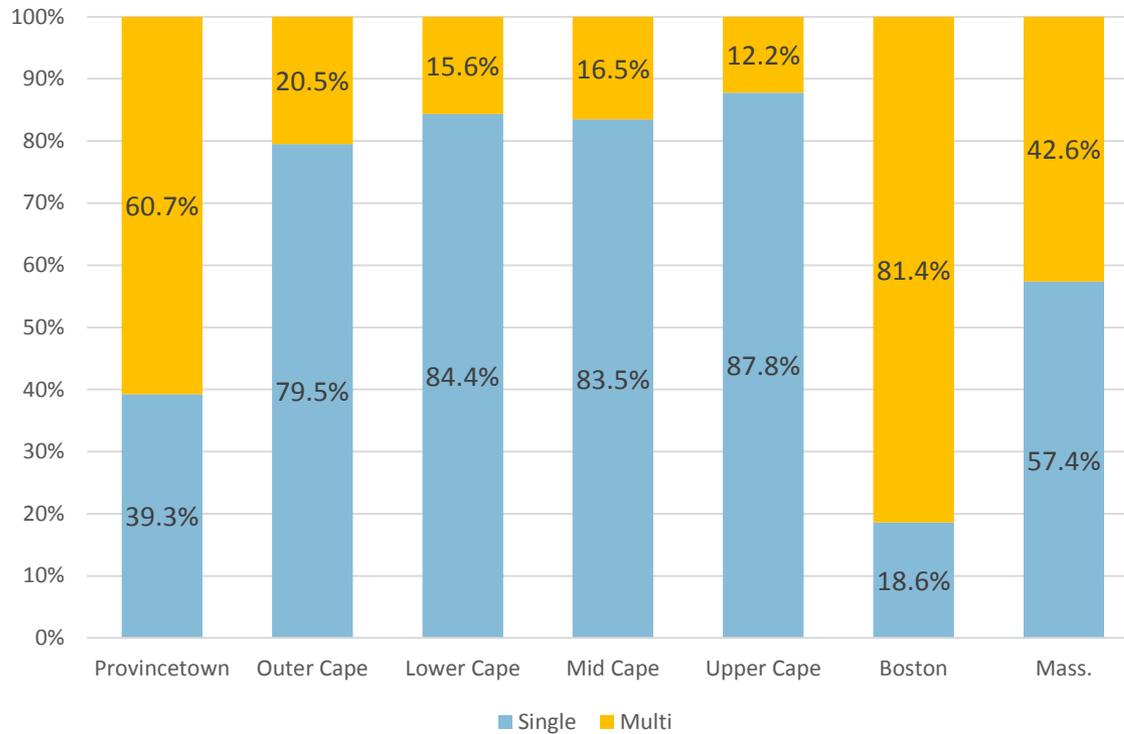
	2010		2015	
	Year-Round Renter Households	Spending 35% of income or more on rent	Year-Round Renter Households	Spending 35% of income or more on rent
Provincetown	592	57.6%	617	64.2%
Outer Cape	1451	43.8%	1401	54.9%
Lower Cape	3061	33.2%	2831	39.5%
Mid Cape	8983	43.9%	8720	44.6%
Upper Cape	5789	40.3%	7055	34.2%
Boston	159964	42.9%	168336	41.4%
Mass.	904078	40.4%	966054	40.5%

Source: 2006-2010 & 2011-2015 American Community Survey 5-Year Estimates



Housing

Units by Building Type, 2015

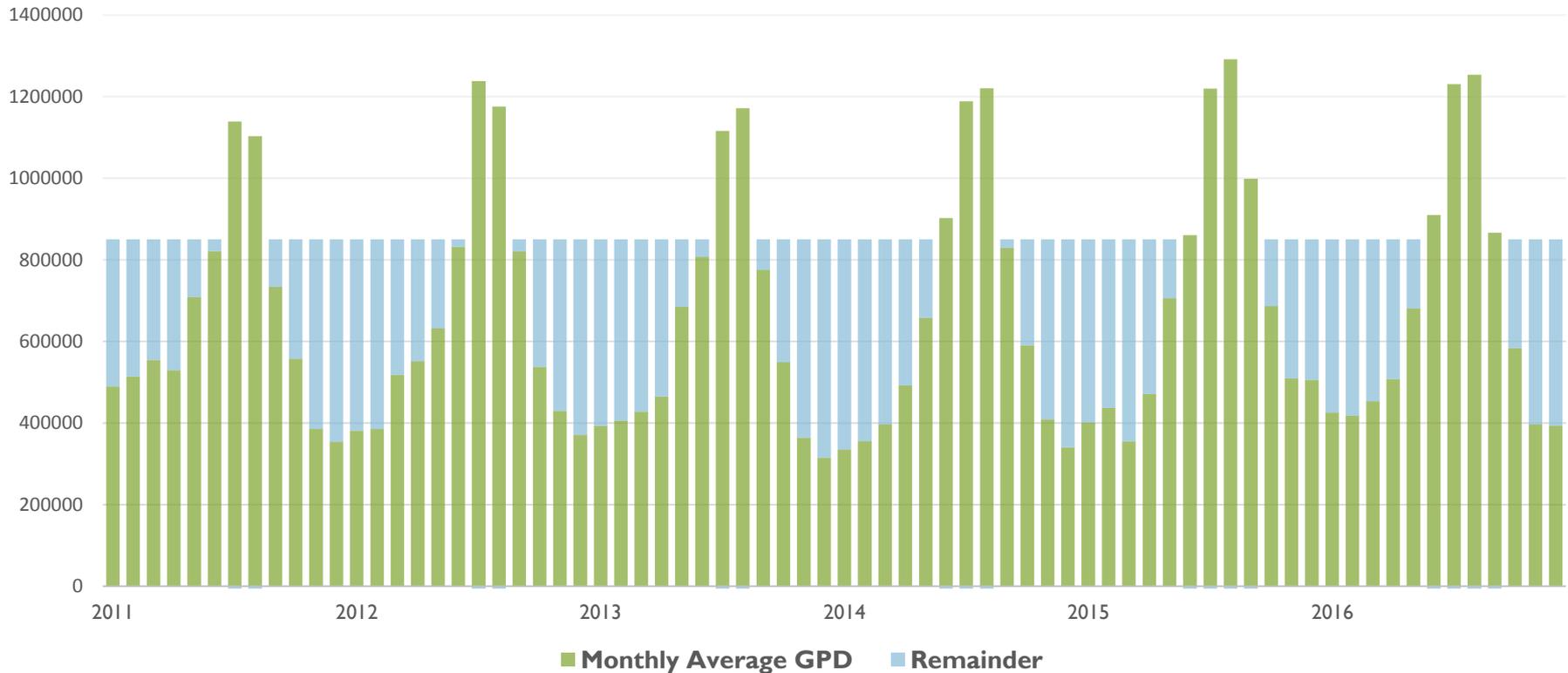


Source: 2011-2015 American Community Survey 5-Year Estimates



Water Usage

Monthly Average Water Withdrawals, 2011-2016

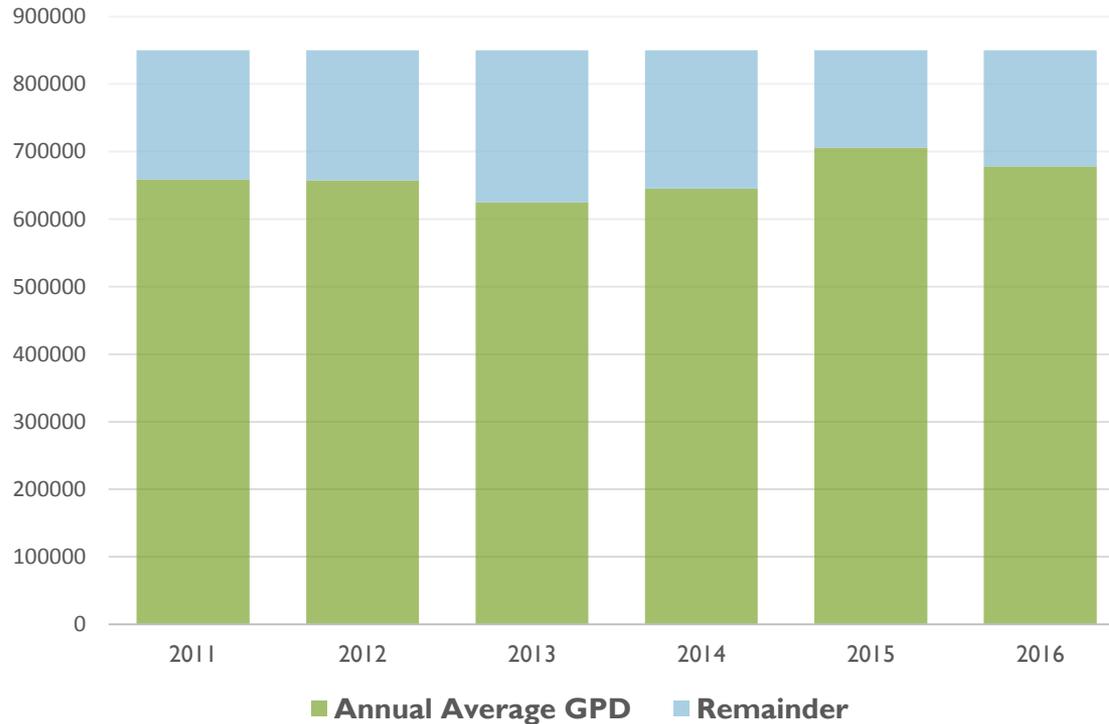


Source: Town of Provincetown



Water Usage

Yearly Average Water Withdrawals, 2011-2016



Source: Town of Provincetown



Wastewater Usage

Yearly Average Wastewater Usage with Peak Events, 2011-2016



Source: Town of Provincetown



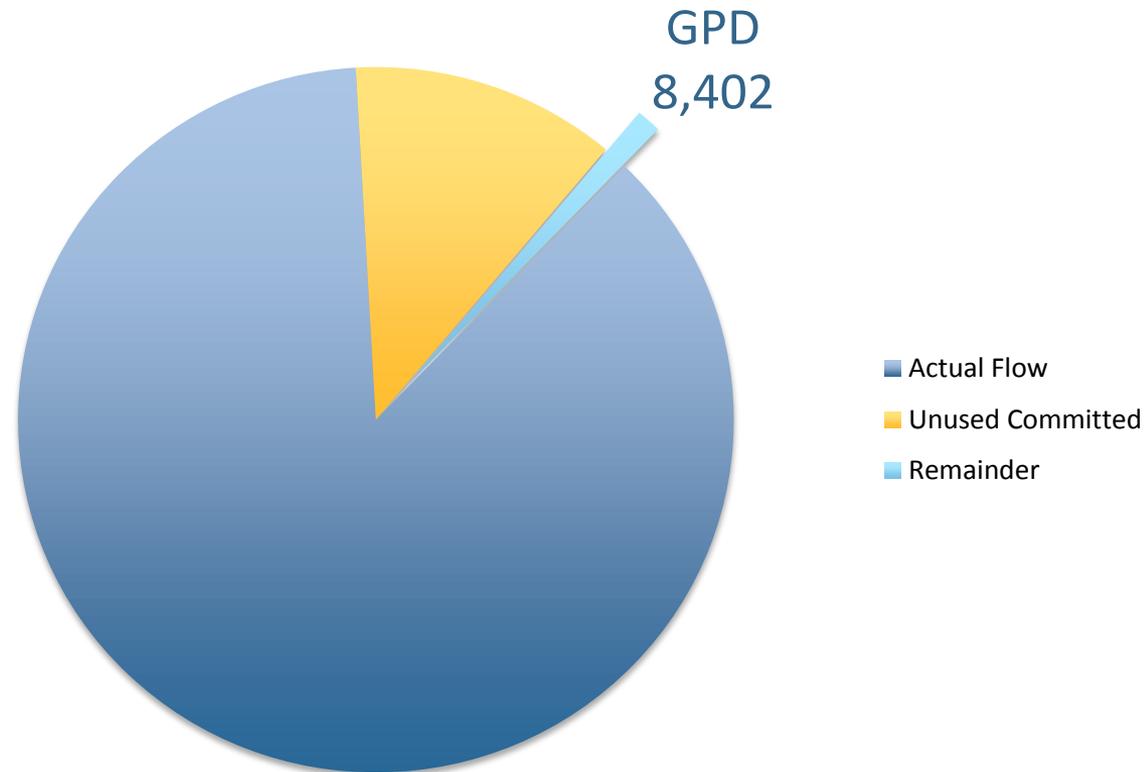
Imagine...

It's the 4th of July during a major storm

- All of the committed capacity has been connected to the sewer system
- System capacity is 750,000 GPD
- 30,000 GPD optional reserve is in effect

Under these conditions, 8,402 GPD would remain unused.

Hypothetical Worst Case Scenario



Source: Town of Provincetown