



# DOWNTOWN SAVANNAH OUTREACH MARKET STUDY

GRAY'S REEF NATIONAL MARINE SANCTUARY

NOAA'S OFFICE OF NATIONAL MARINE SANCTUARIES

FACILITY PROGRAMMING AND CONSULTING

FINAL - APRIL 2010



**FACILITY  
PROGRAMMING  
AND CONSULTING**



NATIONAL MARINE  
SANCTUARIES





## INTRODUCTION

**N**OAA's Office of National Marine Sanctuaries (ONMS) has engaged Facility Programming and Consulting to prepare a Market Research Study for the Savannah Outreach Project.

This Market Study is intended to become a supporting document for a future Facility Strategy for the Savannah Outreach Project.

# FOREWORD

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Space Utilization Analysis

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*The contents of this document are not for regulatory approval, permitting, or construction. Final published April 2010*

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Kenny Hill	Executive Director of the Savannah Waterfront Association
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Joe Marinelli	Savannah Visitors and Convention Bureau
Bill Merriman	Sapelo Visitor Center Manager
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# Executive Summary



# INTRODUCTION

Gray's Reef National Marine Sanctuary (GRNMS) is conducting a market study to analyze the feasibility and community interest in establishing an outreach presence in downtown Savannah, GA, to supplement the current administrative location on Skidaway Island.

## Background

Gray's Reef National Marine Sanctuary is one of 14 marine protected areas that make up the National Marine Sanctuary System that encompasses more than 150,000 square miles of marine and Great Lakes waters from Washington State to the Florida Keys, and from Lake Huron to American Samoa. Gray's Reef is one of three national marine sanctuaries that make up the Southeast Region. It is governed by the National Marine Sanctuaries Act and managed by the National Oceanic and Atmospheric Administration (NOAA). The National Marine Sanctuaries Act mandates the Office of National Marine Sanctuaries (ONMS) "to identify and designate as national marine sanctuaries areas of the marine environment which are of special national significance and to manage these areas as the National Marine Sanctuary System..."

The mission of NOAA's National Marine Sanctuaries is to serve as the trustee for the nation's system of marine protected areas, to

conserve, protect, and enhance their biodiversity, ecological integrity and cultural legacy. Each sanctuary is a special place with its own habitats, living resources, and cultural resources needing special protections.

The National Marine Sanctuary System consists of 13 sanctuaries and one marine national monument. The sanctuaries are grouped into four regions, including the North East Region, the South East Region that includes the GRNMS, the West Coast Region, and the Pacific Islands Region.



▲ Marine National Monument  
● National Marine Sanctuary

Figure 1: National Marine Sanctuary System Locations

## About GRNMS

Gray's Reef National Marine Sanctuary, designated in January 1981, is one of the largest near shore live-bottom reefs in the southeastern United States. The sanctuary is located 17.5 nautical miles off Sapelo Island, GA. GRNMS is the only natural reef area protected off the Georgia Coast.

Current GRNMS facilities are located approximately 20 miles outside the City of Savannah on the north end of Skidaway Island on the campus of Skidaway Institute of Oceanography.

## Current GRNMS Locations

Exhibit partnerships have become an important method for the ONMS to reach people. Partnerships are often a successful and cost-effective method to reach the public, and GRNMS has several partners that sponsor exhibits, signs, or kiosks related to the system, including

- The Georgia Aquarium (Atlanta, GA)
- Tybee Island Marine Science Center (Tybee Island, near Savannah, GA)
- The Fernbank Museum of Natural History (Atlanta, GA)
- The University of Georgia's Marine Education Center and Aquarium (Skidaway Island, near Savannah, GA)
- Georgia Southern University (Statesboro GA)
- The South Carolina Aquarium (Charleston, SC)
- Sapelo Island Visitor Center (Sapelo Island, GA)

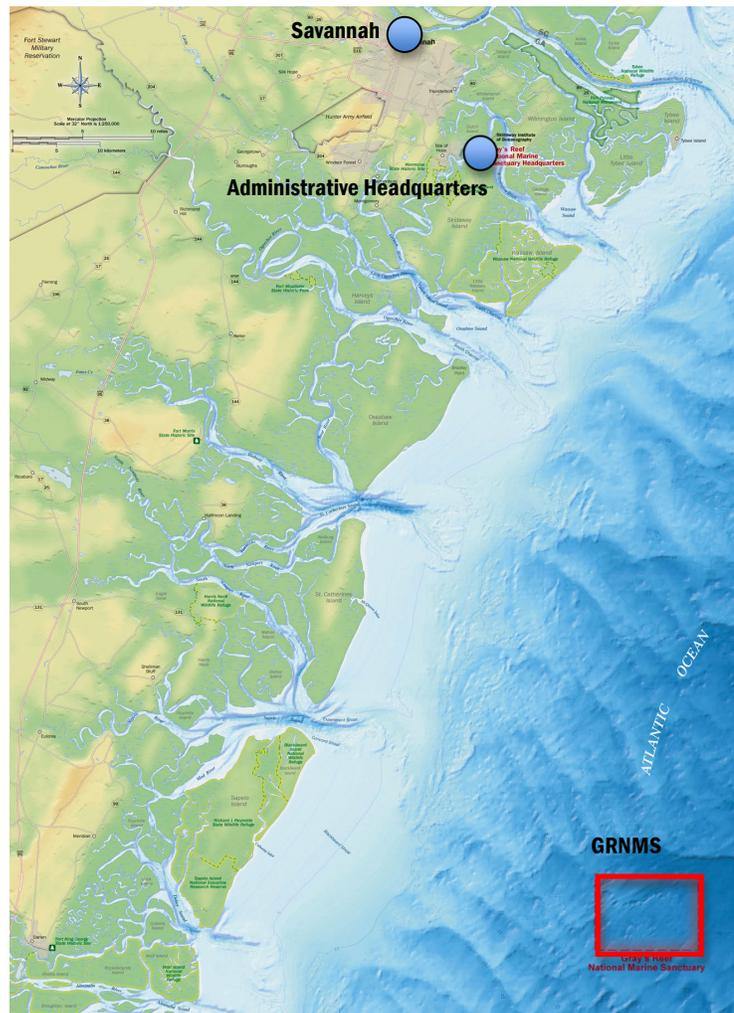


Figure 2: GRNMS Locations



Figure 3: GRNMS Exhibit Locations

## **Project Summary**

The Savannah Outreach Project Market Study looks to gather available information about the current sanctuary facilities and the local perception, tourism and resident data related to visitors at GRNMS, and any market information relating to visitors and tourism in Savannah. The market study is meant to be a driver for a possible satellite location, exhibit(s), or multiple locations and/or partnerships in downtown Savannah to reach more tourists and residents with the sanctuary message.

The actual sanctuary is only accessible by boat; however, GRNMS administrative offices are on the north end of Skidaway Island near Savannah but approximately 20 miles away. Although the sanctuary has partnerships with many organizations, the site would like to expand education and outreach to the Savannah River Street area - a destination stop in southeast Georgia for many tourists.

Through detailed interviews with more than 100 contacts in the Savannah tourism industry it is evident that community support for a GRNMS outreach project is overwhelmingly positive and the community looks to continue to follow the progress made on the project.

This Market Study is intended to become a supporting document for a future Facility Strategy for the Savannah Outreach Project.

## **Project Vision, Goals, and Objectives**

Several items were deemed as important visions for this project and goals for the Savannah Outreach project:

- The message will continue to be an outlet for the “One NOAA” concept and the overarching conservation message of the National Marine Sanctuary System.
- Reach two primary markets – both tourists and residents and make the educational experience available to everyone.
- Examine all options and locations for downtown outreach opportunities.
- Increase support of Gray’s Reef, NOAA, and ocean stewardship through education, exhibits, and programming.
- Provide interactive exhibits linking people of all ages to the ocean.
- “We need more people to become aware of our mission.”
- Make the National Marine Sanctuary System virtually available to everyone by making it possible for people to see all of the sites.

# EXECUTIVE SUMMARY

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## Project Location

The proposed location for the Savannah Outreach project is in downtown Savannah, GA. While the original preferred location was in the River Street area, a popular tourist location near the Savannah River, several other areas were identified as possible locations and/or partnerships during the market research phase. The boundaries of Downtown Savannah are identified below.



Figure 4: Downtown Savannah

Downtown Savannah has a diverse population including tourists, residents, students, and employees; increased development in recent years has boosted demand for offerings in the area.

A more detailed list of potential locations, including those outside the downtown area, is included in Chapter 2 of this document.

## **Project Process**

The Savannah Outreach Market Study has involved two working groups of participants. The Internal Working Group consists of GRNMS staff members, while the External Working Group includes civic, business, and tourism leaders in the Savannah community.

### **1. Fact-Finding**

The intent of this phase is to gather, organize, and analyze the data that is included in the Market Study. The fact-finding phase began with a kickoff teleconference to discuss expectations from the internal working group, coupled with the following tasks:

- Preliminary Information Collection. Facility Programming and Consulting gathered as much preliminary information as possible in order to develop the initial parameters for the rest of the data collection phase.
- Vision Session. The intent visioning workshop, held February 23, 2010, was to establish a common vision for the project that meets NOAA's mission requirements (e.g., outreach and education) as well as addresses the needs of the stakeholders. Participants in the vision session included local community leaders who were introduced to the GRNMS outreach project and were able to provide helpful input.
- On-site Interviews and Tours. Facility Programming and Consulting conducted interactive and participatory interviews with the sanctuary's key representatives and stakeholders along with site tours of specific areas of interest in downtown Savannah.

### **2. Data Analysis**

Facility Programming and Consulting was asked to prepare a draft market research study that is based on available existing demographic and tourist data, analyze operational and financial information related to visitors to Savannah and GRNMS, and to gather all the preliminary information and interpret the results along with the information obtained from the Vision Session and On-site Interviews.

### **3. Final Market Research Study**

The final Market Research Study is meant to provide the following information to the possible future facility strategy:

- Identification of market areas;
- Definition and character of the market area population including demographic, lifestyle clusters and socio-economics;
- Breakdown of the population into appropriate segments to determine potential users;

## EXECUTIVE SUMMARY

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- Estimates of the number of customers appropriate for the proposed project; identification and impact of the other competitive recreation/entertainment activities; and
- Recommended strategic direction for development.

Resident Market Data

2



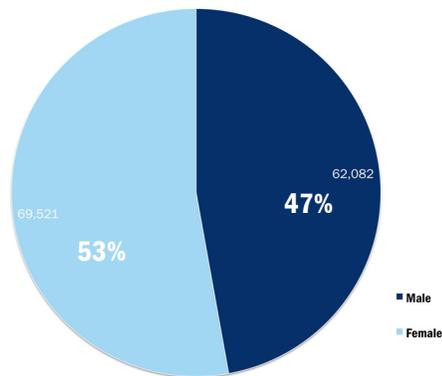
# INTRODUCTION

During the visioning for the Savannah outreach project preliminary planning, two market sectors were determined as target markets for the project – local residents and tourists. This section pertains to the resident market, reviewing data gathered about Savannah residents. A primary goal of the downtown outreach project is to reach residents as well as tourists; therefore it is worthwhile to know as much about the average Savannah resident as possible. The information was compiled from US Census Bureau Data. In addition, the consulting team made contact with more than 70 residents in various sectors of the Savannah tourism market.

## City of Savannah Population Overview

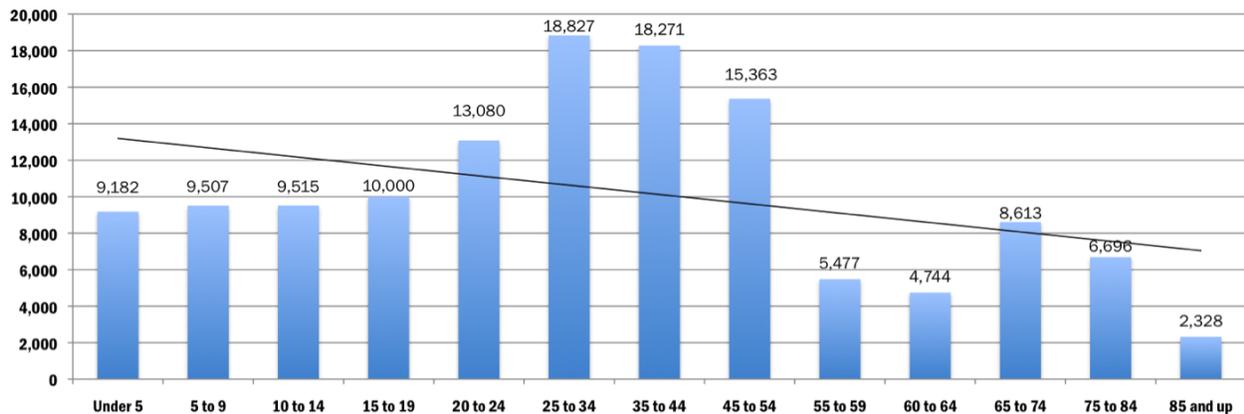
- 2008 Estimate Population: 334,353 with average growth of 1.5 percent.
- Square Miles: 74.74
- Population per Square Mile: 1,759

### Gender



### Age

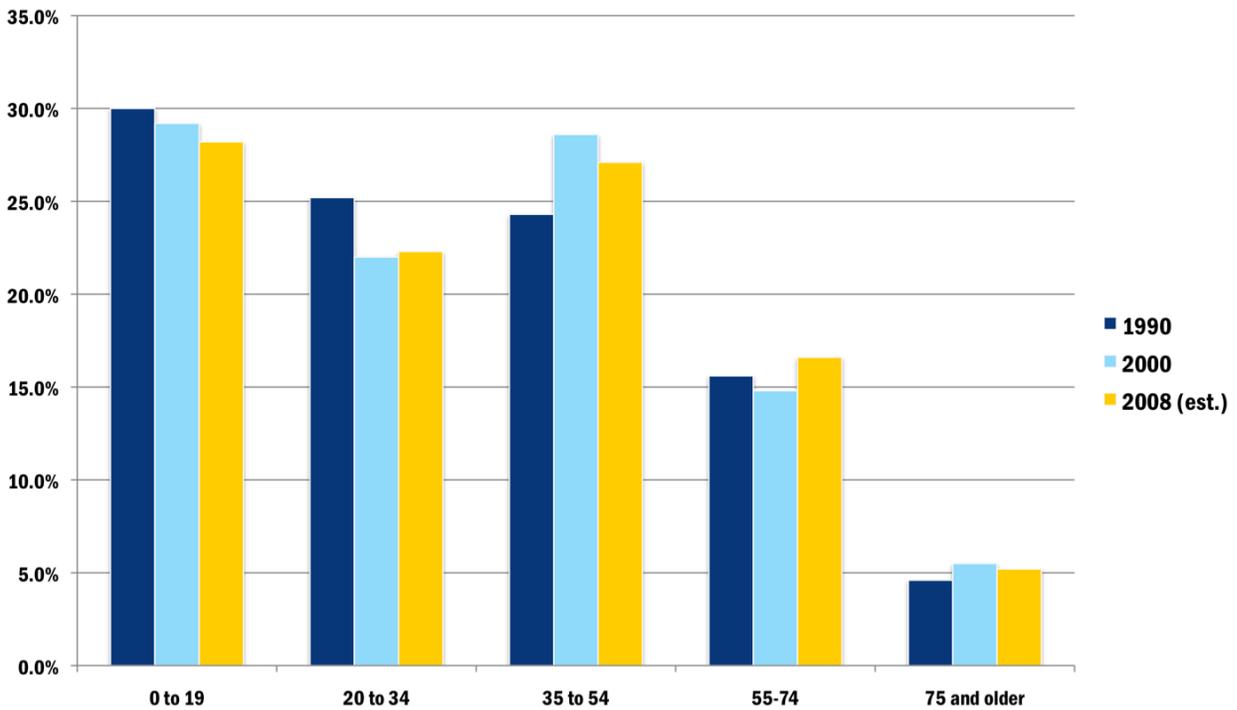
- The fastest growing census bracket is less than five years old



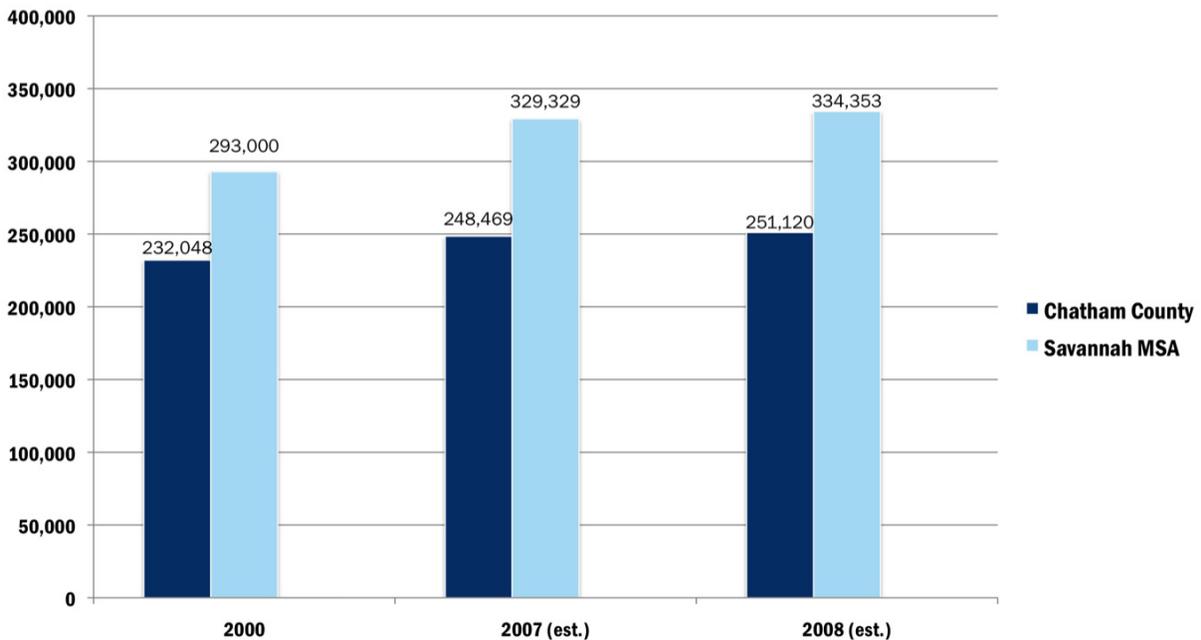
# RESIDENT MARKET DATA

## Resident Demographics

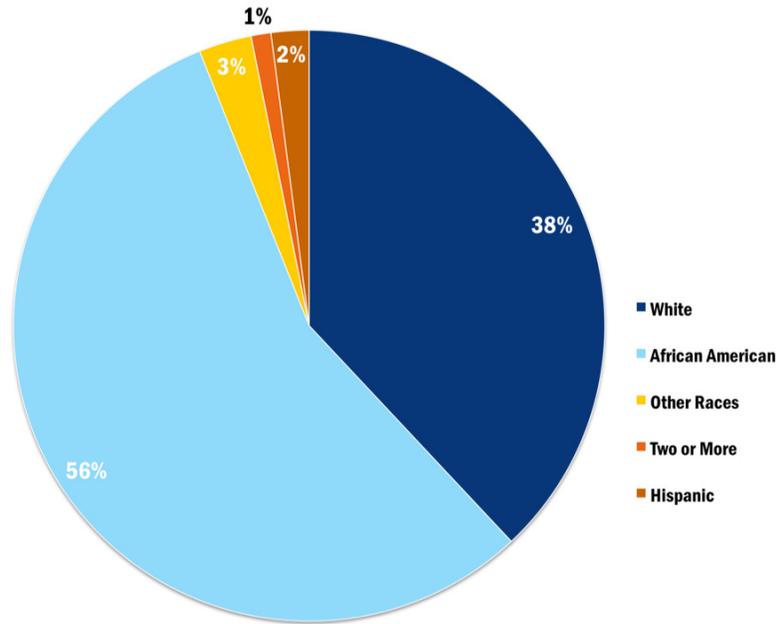
### Population Age Distribution



### Population

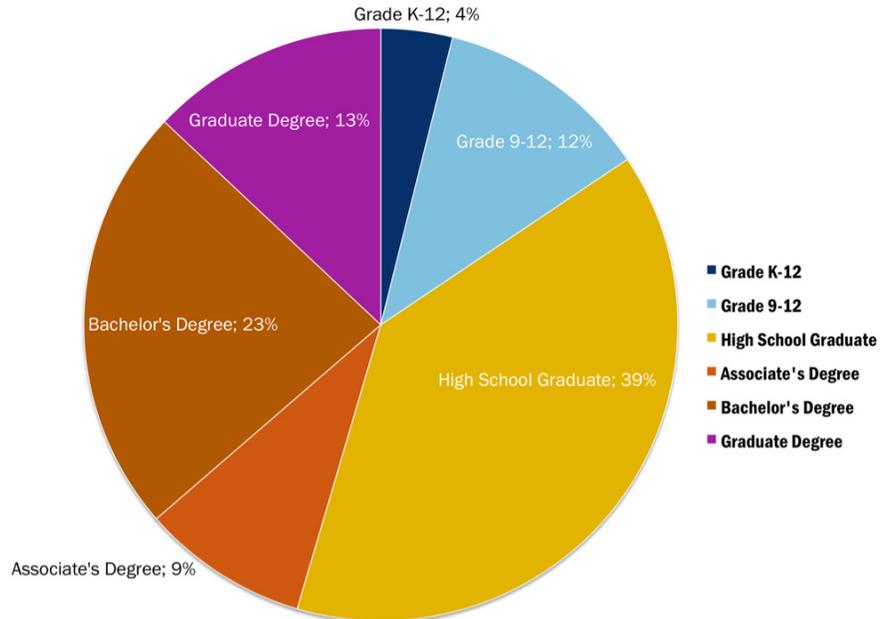


### Race and Ethnicity



### Educational Attainment (25 years and older)

- There are 18 colleges and universities within a 45-minute drive.

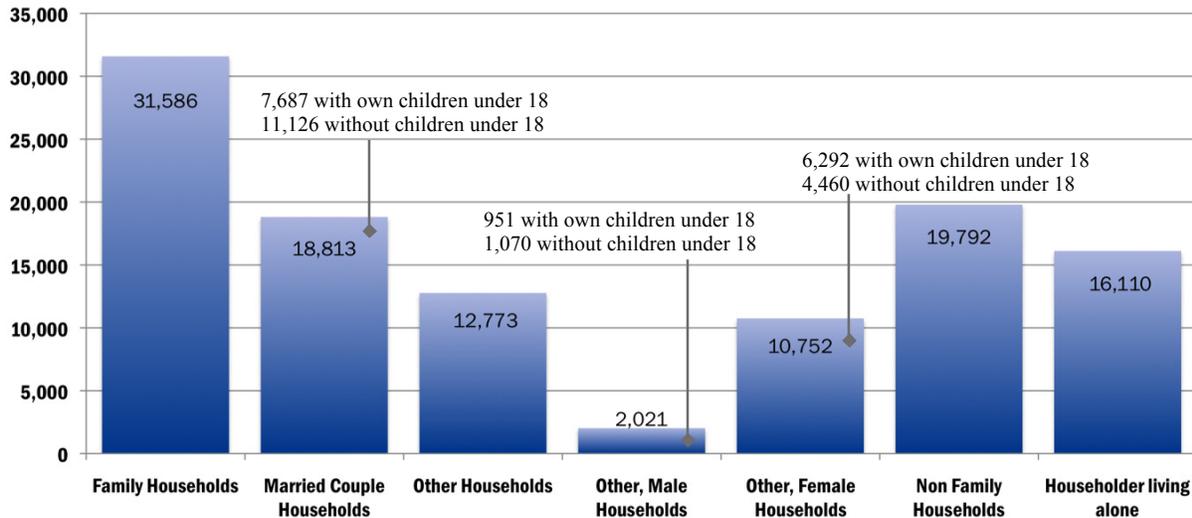


# RESIDENT MARKET DATA

## Resident Demographics

### Households and Type

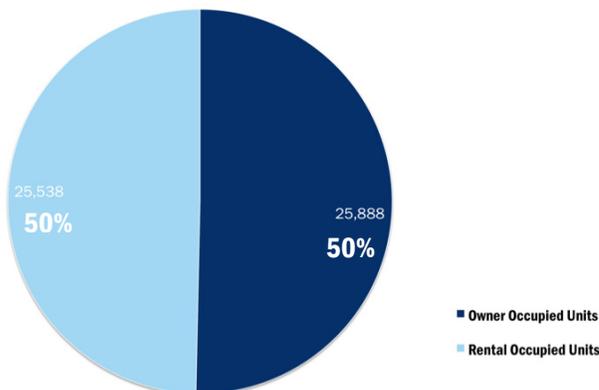
Total Number of Households 127,807



### Housing Units

Average Home Value \$99,676

Average Gross Monthly Rent \$576



### Downtown Real Estate

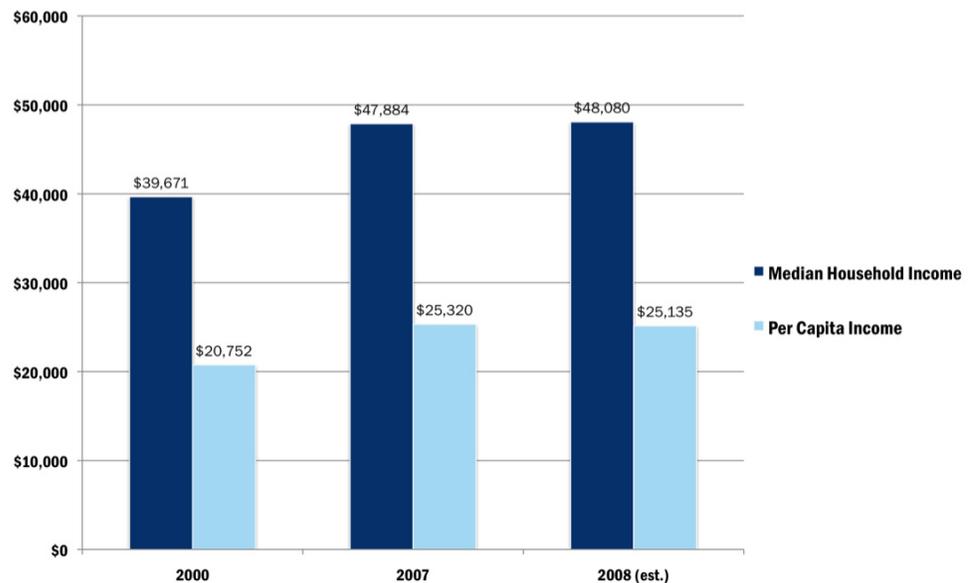
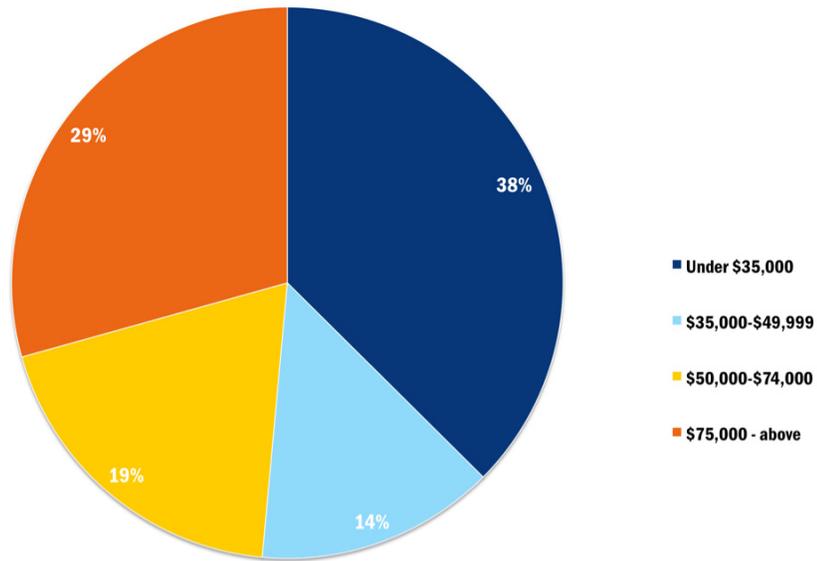
Market	No. of Buildings	Overall Vacancy Rate	Net Rental Rate*
Downtown / Eastside	48	25%	\$18.66

Gilbert & Lattimore Commercial Real Estate, Cushman & Wakefield Alliance  
Marketbeat Report, 4Q 2009

\*Rental rates reflect \$psf/year and do not include space available for sublease.

### Household Income

- Personal income grew +4.7 percent (national average 3.4 percent).
- Median household income is \$48,080.
- Residents are becoming more affluent; 30 percent of residents have an income above \$70,000.
- Percentage below poverty is 21.8 percent.
- The most current local unemployment rate is 9.3 percent (2010).



# RESIDENT MARKET DATA

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## **Resident Demographics**

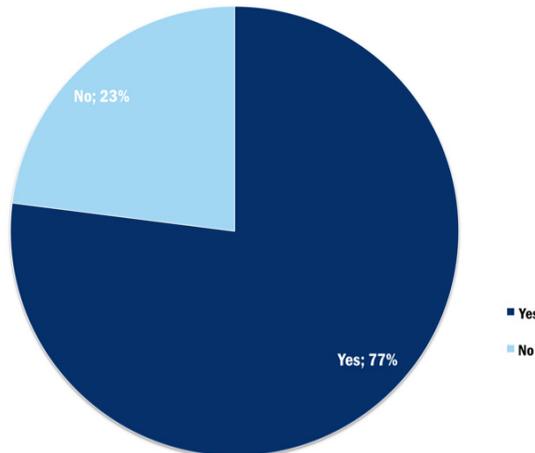
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### Market Interviews

As part of the resident study, Facility Programming and Consulting contacted more than 100 peer tourism offerings in the Savannah-Chatham area; of the 100 people contacted, 70 elected to participate in the Market Research interview. Participants were asked questions about the GRNMS and the current location at the Skidaway Institute of Oceanography campus, along with their thoughts on a potential satellite location. Industry peers included museums and cultural offerings, tours, charters, environmental agencies, and various Savannah visitor centers. The findings of these interviews are summarized on the following pages. A complete list of these industry peers is included in the appendix of this document, along with the market study questionnaire

### Aware of GRNMS\*

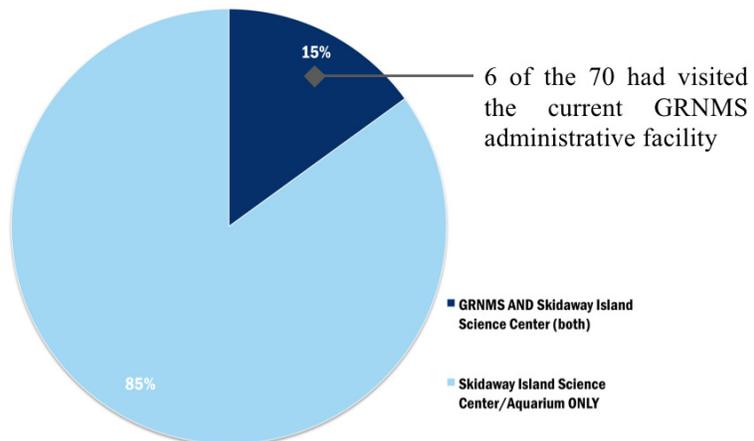
Participants were asked if they had heard of ONMS and GRNMS.



\* Of the 70 people interviewed

### Visited GRNMS or Skidaway Island

Participants were asked if they had visited either Skidaway Island or the GRNMS administrative facility on the island.



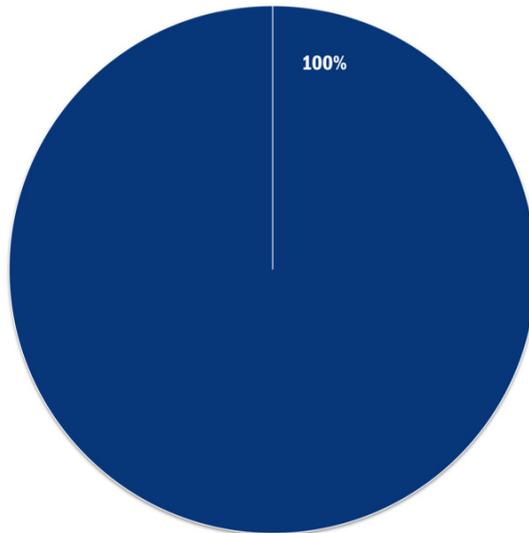
# RESIDENT MARKET DATA

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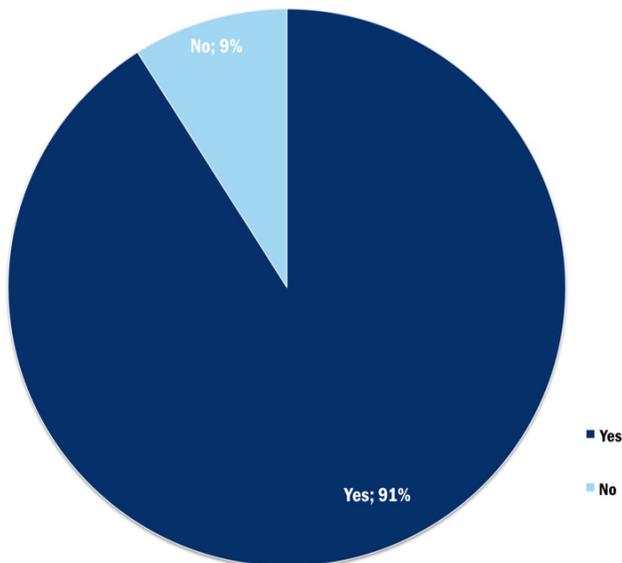
## Resident Demographics

### Clearly Marked\*

Participants were asked if the GRNMS facility was clearly marked and accessible.

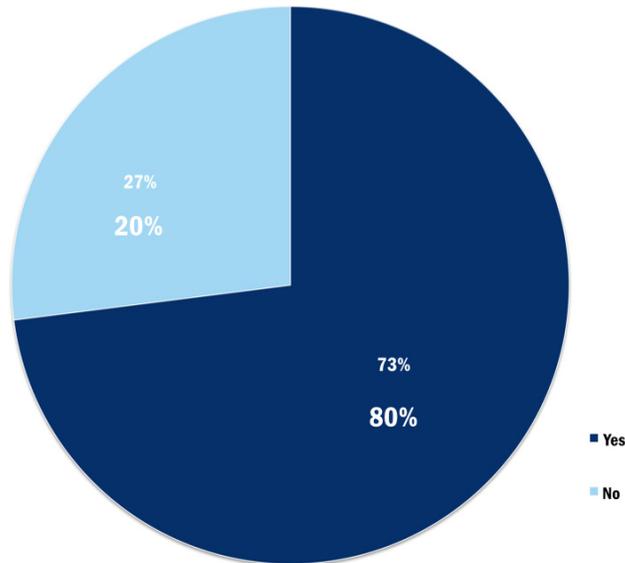


### Accessible\*



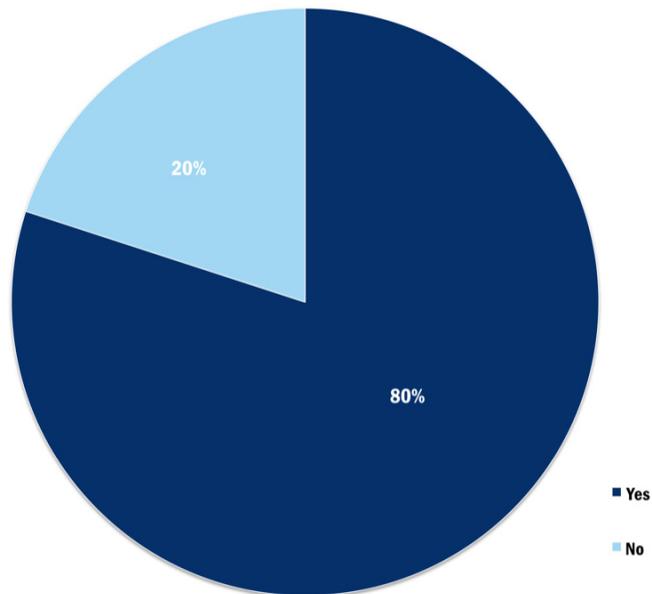
*\*Of the six who had visited GRNMS*

**Would Visit Again\***



*\* Of the six who had visited GRNMS*

**GRNMS would be better served with a Satellite Location**



# RESIDENT MARKET DATA

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## **Resident Demographics**

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### Participant Feedback

In addition to the 70 phone interviews, a workshop was held with local community leaders from various sectors of the City of Savannah, including civic, business, and tourism leaders. The workshop was meant to introduce people to GRNMS and the potential outreach project, and encourage participants to brainstorm opportunities, roadblocks, and experience. Participants were generally supportive and encouraging of a GRNMS outreach project in the area and that the message of the ONMS fits well with other offerings in the area along with being of interest to tourists and locals.

The following statements summarize overarching themes that were gathered from study participants about the GRNMS' current facility.

- Enjoyable experience but time consuming to travel to Skidaway Island.
- Not a destination; must have reason for going that direction.
- Not a destination for repeat visits.
- Signage is not welcoming for a facility that is open to the public.
- The current location is ideal for ocean access and scientific networking, but not for community or tourist outreach.

Overall, the feeling was that the facility is in a prime location for research and science endeavors and makes sense in the current location, but if the goal of the sanctuary is to reach people this is not an ideal location.

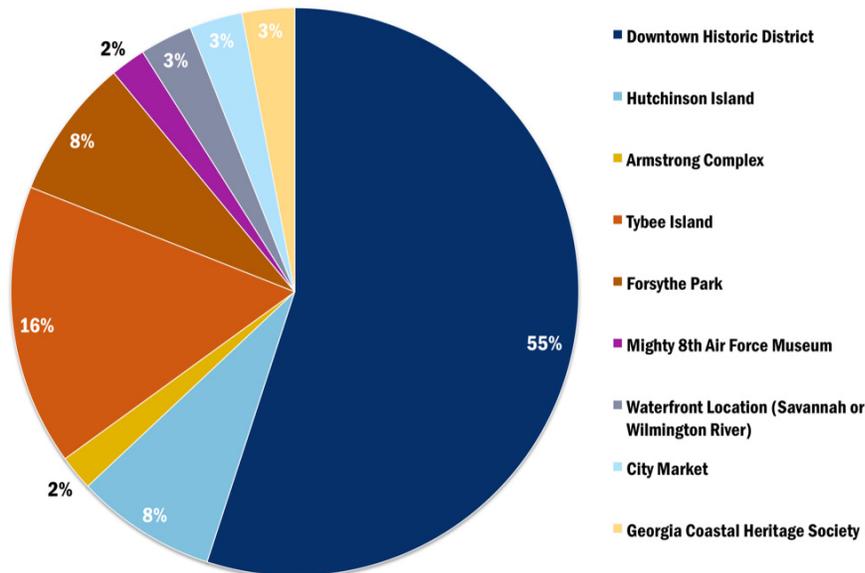
Study participants were also asked what locations / partners would be good satellite locations for GRNMS. The general opinion was that the location should be in the downtown area, but not necessarily on River Street because locals do not visit this area. A summary of responses is included on the following pages.

# RESIDENT MARKET DATA

## Resident Demographics

### Potential Satellite Locations

Study participants who agreed that GRNMS would be better served with a satellite location(s) and/or exhibits suggested the following locations as possible partnerships for GRNMS.



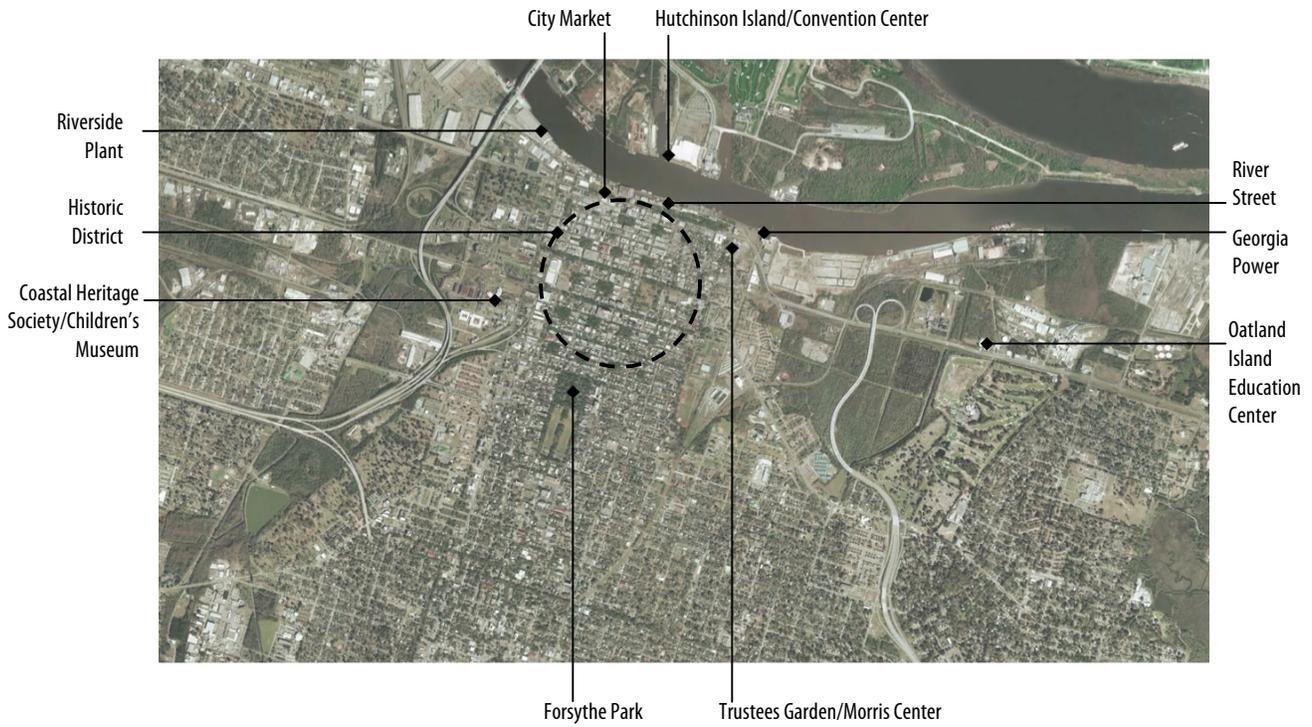
Other suggestions for possible satellite locations included:

- Malls
- Morris Center and Trustee's Garden (Nine acre historic district site under development as a legacy to the city)
- Riverside Plant (west end of River Street near bridge and under redevelopment)
- Georgia Public Broadcasting's downtown facility
- Fort Pulaski
- Bass Pro Shops
- Georgia Power office; currently on the market

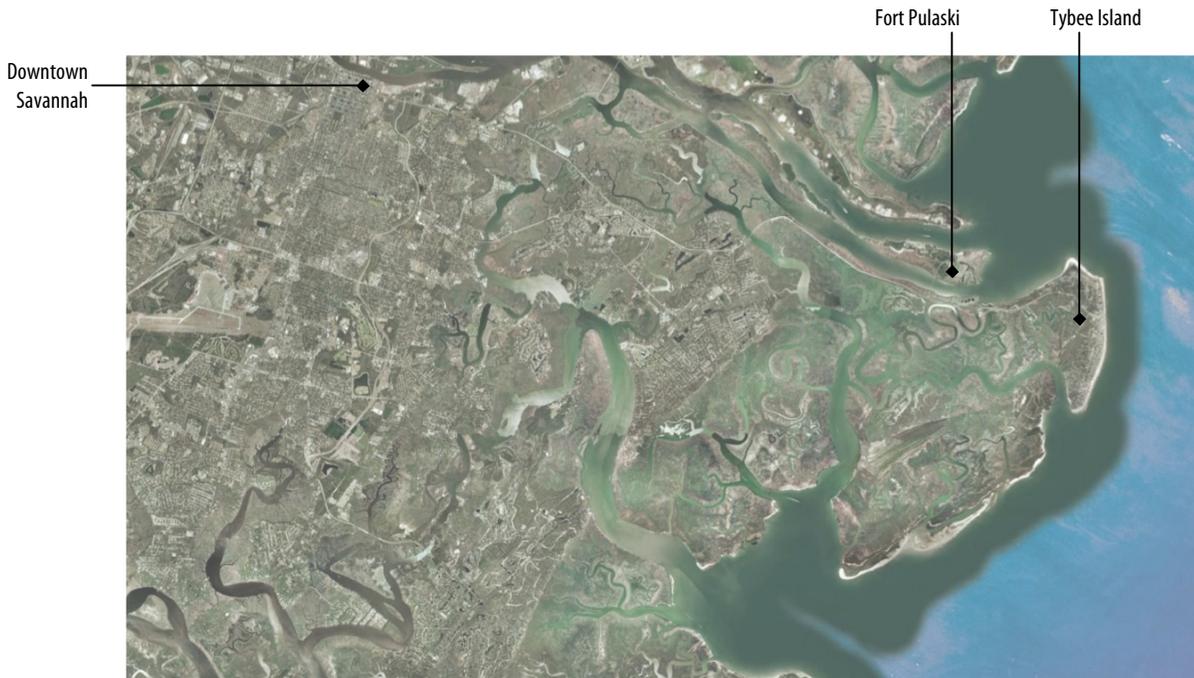
Participants were also asked about any examples that the GRNMS could emulate and/or any potential partnerships or synergies with other organizations that come to mind.

- Tybee Marine Science Center
- Oatland Island Education Center
- Skidaway Marine Science Center
- Savannah-Ogeechee Canal Museum and Visitor Center
- Bamboo Farms
- Massie Heritage School
- Savannah Wildlife Refuge

### Downtown Savannah Area Locations



### Surrounding Area Locations



# RESIDENT MARKET DATA

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## Resident Demographics

### Summary

Community support for an increased ONMS presence in Savannah is strong. The resident market includes locals - those living in the greater Savannah area and the downtown area. There is an opportunity to fill a “niche” market in the area for “eco-tourism” with education of ocean conservation, the National Marine Sanctuary System and the greater NOAA message including climate change.

While the GRNMS has been successful in maximizing science and research at the current location, it is not the best area for community outreach due to its distance from the primary metropolitan center. If the sanctuary looks to expand outreach and education presence, a new approach is recommended. Many locations were suggested as possibilities for outreach, along with many methods for increasing outreach including:

- Educational and community programming such as seminars, educational workshops, teacher workshops, etc.
- Brochures, flyers, and/or handouts
- Interpretive signs, including educational and directional
- Interactive Touch Screen Kiosks
- Visitors Center or Store Front
- Exhibits
- Partnerships
- Virtual presence through the internet

The GRNMS will analyze the feasibility of locations and methods to develop a reasonable strategy to increase presence in Savannah through many of these methods.

Location is a primary concern between the resident market and the tourist market; like many other tourist towns, locals often do not visit the tourist areas and attractions of Savannah. These areas are often crowded and do not offer parking. Community participants were asked their input on potential locations for outreach. The overwhelming preference was somewhere in the downtown historic district, as well as other locations. Suggestions included:

- Tybee Island
- Morris Center and Trustee’s Garden (in the downtown historic district)
- Riverside Plant (in the downtown historic district)
- Georgia Public Broadcasting’s downtown facility
- Fort Pulaski

# RESIDENT MARKET DATA

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## Resident Demographics

- Georgia Power (in the downtown historic district)
- Hutchinson Island and the convention center
- Armstrong Complex
- Forsyth Park (in the downtown historic district)
- Georgia Coastal Heritage Society complex, future home of the Savannah children's museum (in the downtown historic district).

Further development of a facility strategy will further determine a preferred phasing strategy and location to implement an ONMS presence in Savannah.

Downtown Savannah is growing with approximately 25,000 downtown residents, 7,000 Savannah College of Art and Design students, 15,000 workers, and a portion of the 6.6 million tourists that visit the area annually. Tourists primarily support retail business in the "tourist zone" of downtown, north of Broughton Street to the river. The customer base in this area was identified as 70 percent tourist, 10 percent downtown resident, 10 percent downtown workers, and 10 percent other residents.<sup>1</sup> GRNMS should be aware of these downtown market segments when planning options for outreach. The River Street area would likely be successful at reaching tourists, but might now be the best place to reach residents. Any options considered should meet the needs of both user groups while still considering children's needs.

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<sup>1</sup> *Technical Memorandum: 2008 Update Downtown Savannah Market Analysis; Urban Partners*

# RESIDENT MARKET DATA

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## Savannah Tourism Market Data



## INTRODUCTION

**T**his chapter presents Georgia and Savannah tourism data. Many visitors come to Savannah for site seeing and its historic district. The city was named a Top Ten tourist destination by Conde Nast Traveler and Travel & Leisure Magazine. Each year, the city attracts approximately 6.6 million visitors from around the world to visit its many museums, beautiful buildings, historic landmarks including 22 historic squares in 2.2 miles, shops, and beaches. The information presented here was collected from the Savannah Area Convention & Visitors Bureau and the Georgia Visitor Information Centers Survey 2008.

### Savannah Tourism Profile



- Estimated number of overnight visitors is 6.6 million in 2008.
- Direct spending totals nearly \$1.9 billion annually.
- Percentage of expenditures from business or convention travelers: 27.8 percent.
- The majorities of tourists are on vacation and spend between \$200 and \$300 total per day.
- Uniquely situated along the I-95 corridor.
- One of only three places along the coast to stay overnight.
- The busiest months for tourism are March through June (primarily because of mild temperatures).
- Visitors to Savannah are loyal; 60 percent return, half of who return four or more times.
  - The reasons tourists return include value for the price point (approximately 14,745 rooms in Savannah and 4,000 in the historic district), the authenticity and uniqueness of the city, and the offerings.
- Visitors to Savannah are interested in “learning something.”
- The average stay for tourists is two days.
- There is potential to “squeeze an extra afternoon out of their visit.”
- Savannah is disproportionately successful at drawing a national and international audience.
- Most people are not there for a “Disney or theme park” experience.

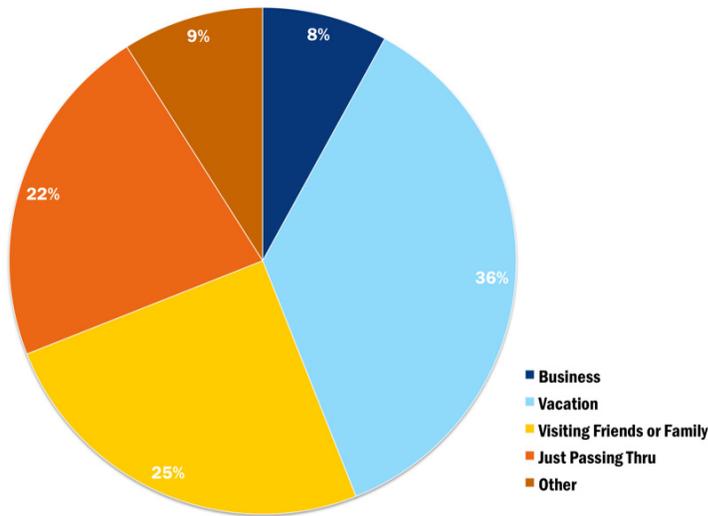
# SAVANNAH TOURISM MARKET DATA

## Georgia Tourism Data

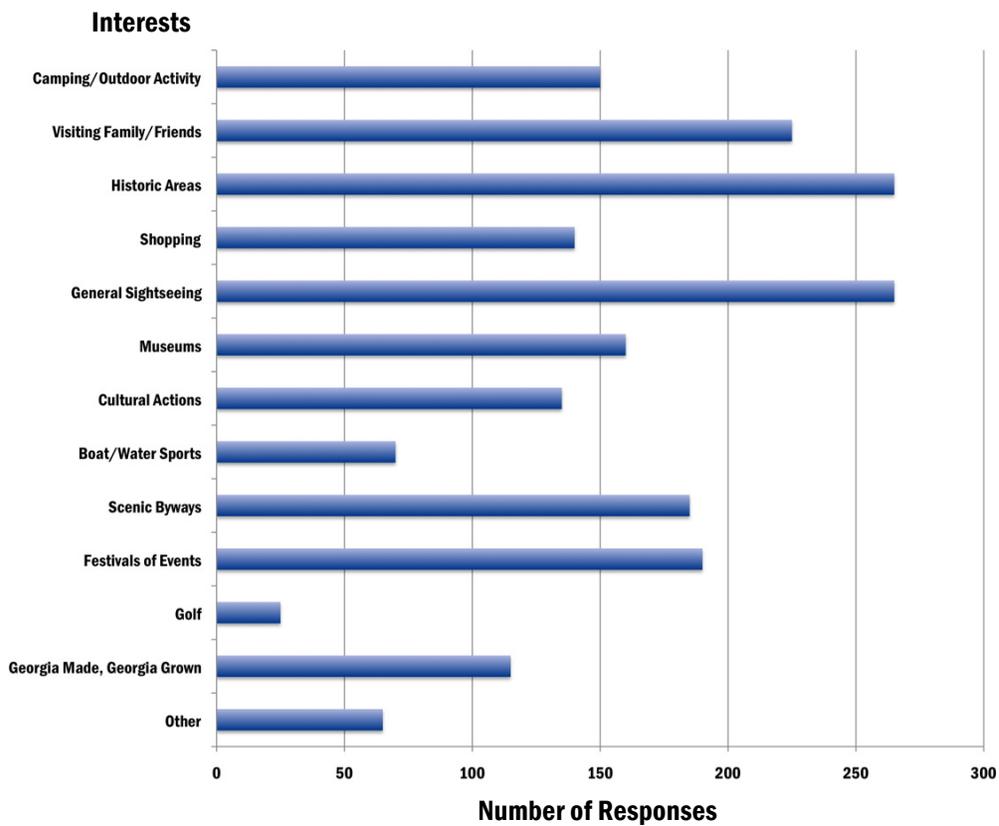
### Georgia Tourism Market

The following section presents tourism data for the State of Georgia.

#### Primary Reason for Visit

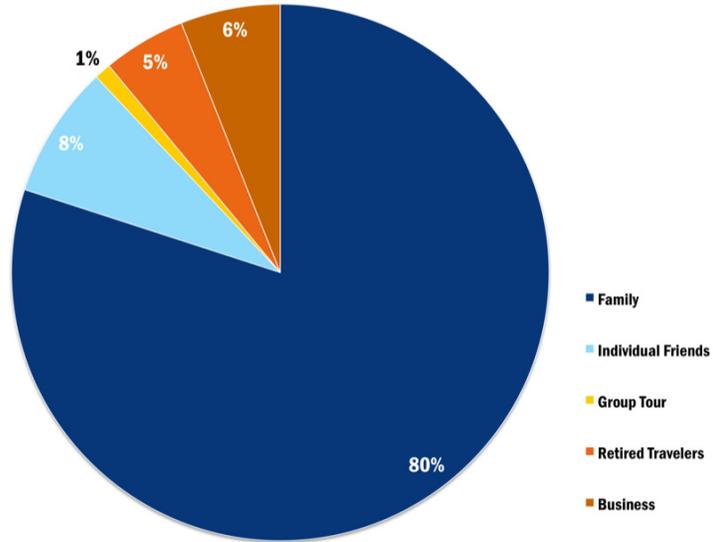


#### Georgia Visitor Primary Interests

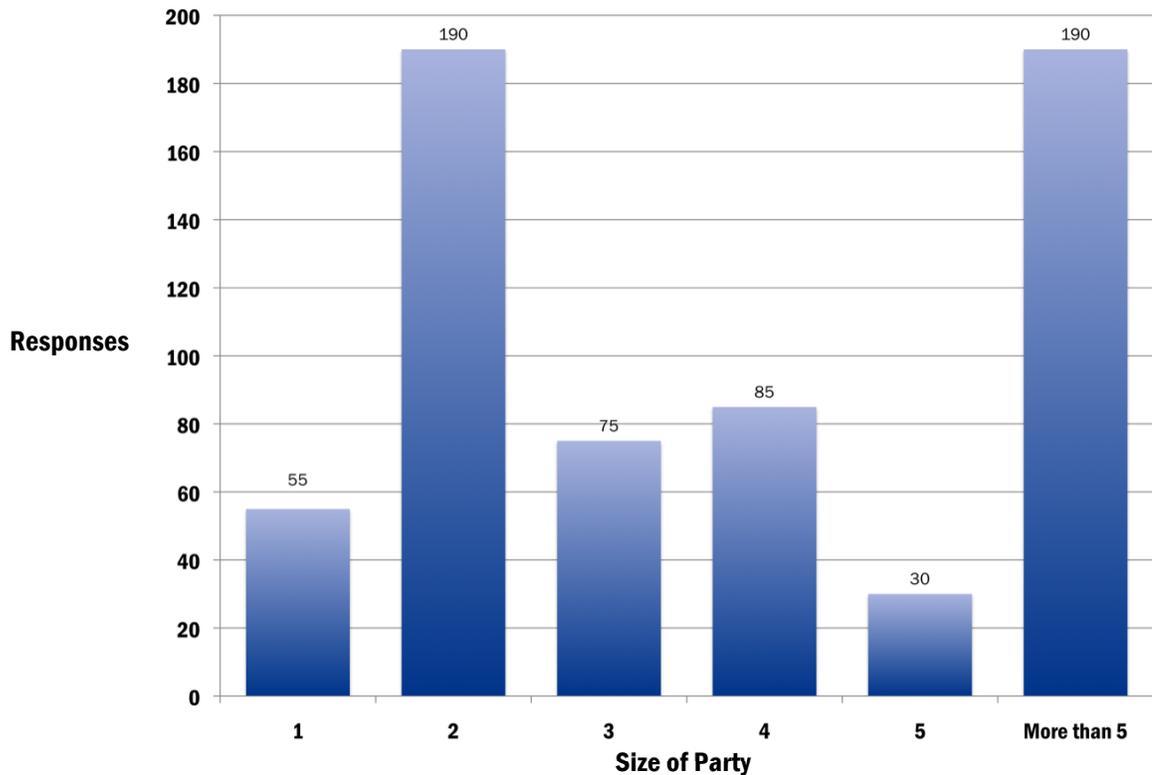


## Travel Party Type

Most travelers are families, and the size of the group is two people, meaning that a majority of Georgia's visitors are married couples coming to visit at some of the historical sites around the state. As the Georgia's leading tourism market, Savannah provides a romantic and elegant setting for this demographic of travelers, but looks to expand family offerings.



## Size of Travel Party

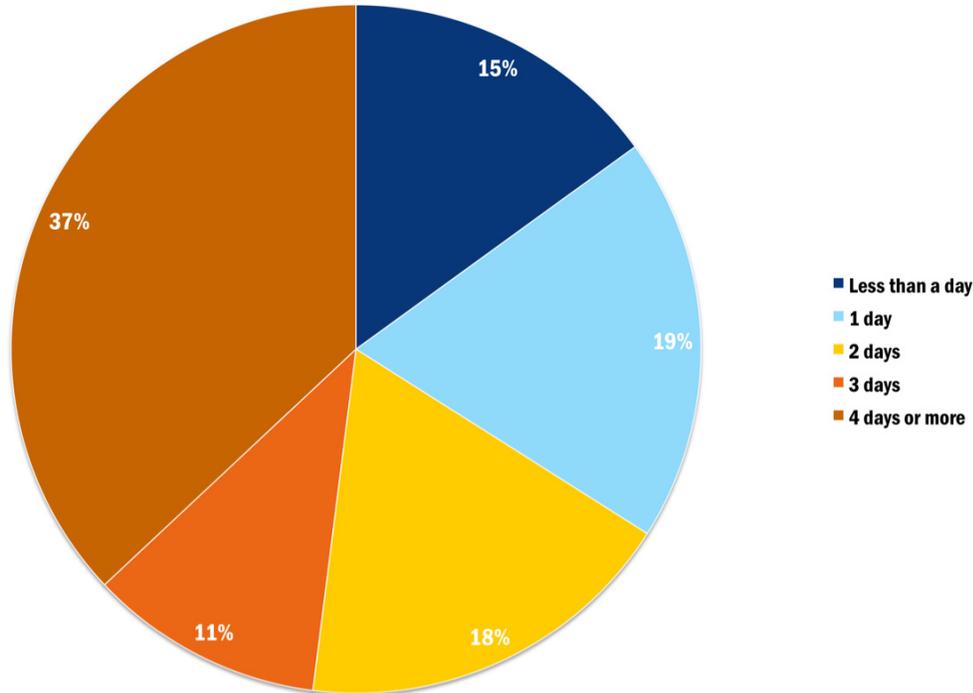


# SAVANNAH TOURISM MARKET DATA

## Georgia Tourism Data

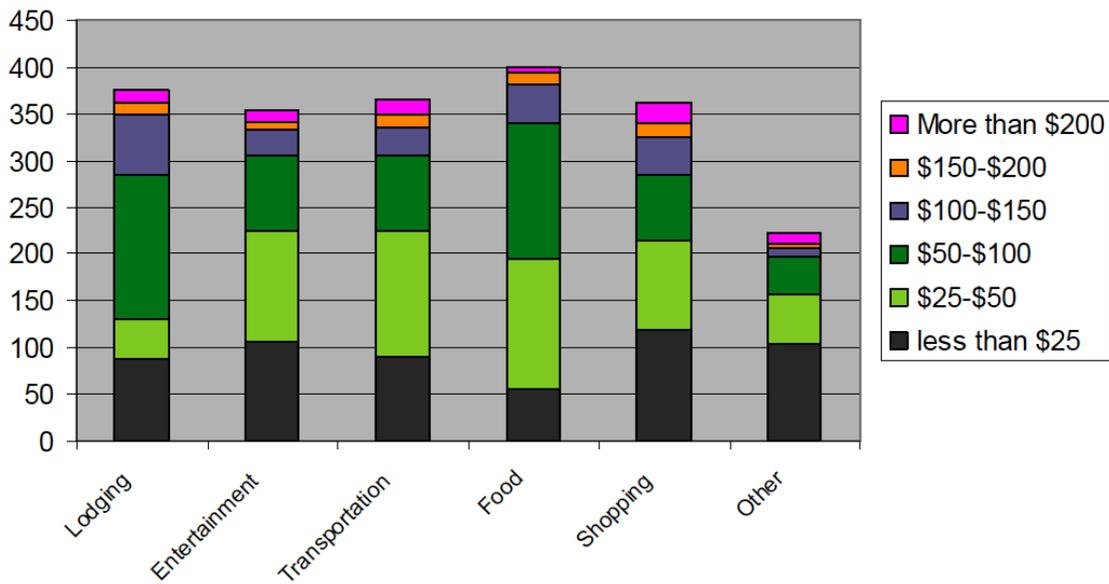
### Length of Stay

The average stay is two days.



### Average Daily Expenditure

The majority of Georgia's tourists are on vacation and spend between \$200 and \$300 total per day.



## Savannah Tourism Data

The following section reviews data related specifically to Savannah tourists.

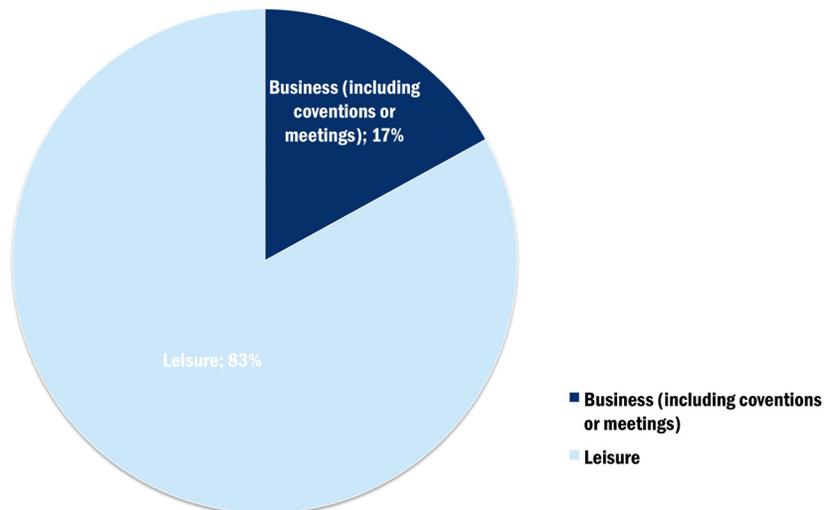
### Tourism Impact

	2004	2005	2006	2007	2008
<b>Number of Lodging Rooms</b>	11,085	11,721	12,448	13,110	13,898
<b>Persons-Stays</b>	6.08 Million	6.35 Million	6.5 Million	6.88 Million	6.15 Million
<b>Direct Spending</b>	\$1.213 Billion	\$1.385 Billion	\$1.8 Billion	\$1.98 Billion	\$1.94 Billion

Source: Savannah Area Convention and Visitors Bureau, Smith Travel Research

### Primary Reason for a Visit to Savannah

Most visitors to Savannah come for leisure activities such as sightseeing, visiting family or friends, festivals and events, and outdoor activities.



### Key Origins for Visitors of Savannah

A majority of Savannah tourists come from the following states:

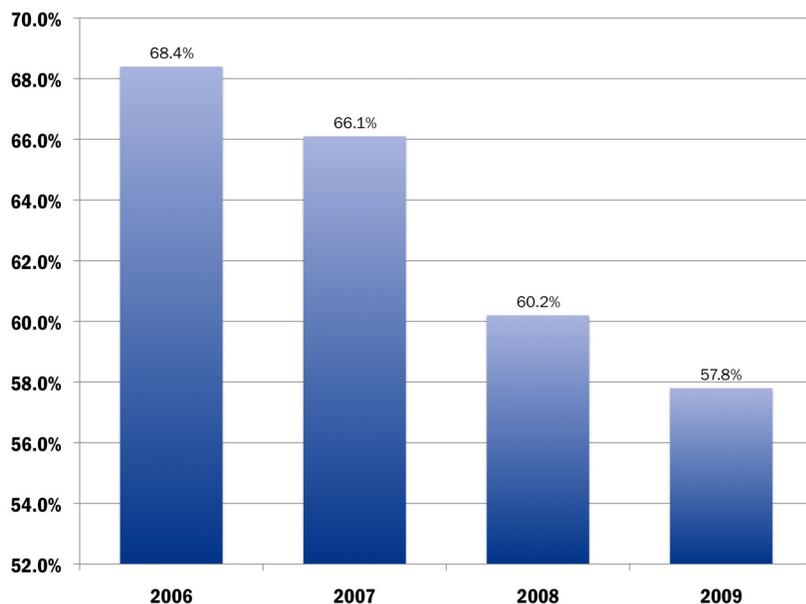
- Maryland
- Delaware
- Georgia
- North Carolina
- Ohio
- Michigan
- South Carolina
- Florida
- Virginia

# SAVANNAH TOURISM MARKET DATA

## Savannah Tourism Data

### Savannah Average Hotel Occupancy

Average occupancy of hotel rooms (approximately 14,000 in the downtown Savannah area) has decreased since 2006.



### Tourist Profiles

The Savannah tourist generally belongs to one of the following five categories. The following information comes from the Savannah Visitor Information Center (located along I-95 South) Report for 2008.

#### 1. Cozy and Comfortable

##### Demographics

- Most are married, without children, or married couples with school age and adult children.
- Single-family homes in older neighborhoods.
- The median age is 41.9 years old.
- Growing moderately by 0.7 percent annually.
- Ethnicity - Most are white.
- Employed tourists represent a range of occupations, from professional or managerial to service, in a variety of industries.
- The median household income is \$65,768.

##### Preferences

- Softball and golf, and, they attend ice hockey games and gamble at casinos.
- Vacations are domestic trips, often to the beach. Disney World is a popular destination.

- Their home computers are generally several years old, because accessing the Internet is not a priority.
- Television is significant.
  - Favorites include watching ice hockey and golf games along with programs such as Live with Regis and Kelly, Antiques Roadshow, and King of Queens.
  - Preferred cable stations include QVC, Home and Garden Television, and the History Channel.
  - Residents listen to ice hockey and professional football games along with classic hits, rock, and soft adult contemporary music on the radio.

## 2. Exurbanites

### Demographics

- Empty nesters (married couples with no children living at home) comprise 40 percent of these households, yet married couples with children occupy 32 percent. Half of the householders are four years old.
- Their median age of 44.6 years old.
- Ethnicity-most are white.
- More than 40 percent of the tourist population aged 25 years and older holds a bachelor's or graduate degree, and more than 30 percent have attended college.
- Approximately half of employed persons hold professional or management positions.
- The median household income is \$88,195. More than 20 percent of households draw retirement income, and 57 percent of households receive additional income from investments.

### Preferences

- Leisure activities include boating, hiking, kayaking, playing Frisbee, photography, and bird watching.
- Residents travel, typically within the United States, and enjoy hiking, playing golf, and visiting national parks on vacation.
- They listen to public radio and donate to PBS.
- Participation in civic activities includes addressing public meetings and doing volunteer work. Many are members of fraternal orders and charitable organizations.

## 3. Up and Coming Families

### Demographics

- Annual growth rate- 4.2 percent
- Median age - 32.0 years old.
- Mix of Generation Xers and baby boomers.

# SAVANNAH TOURISM MARKET DATA

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## Savannah Tourism Data

- Young, affluent families with younger children; 80 percent of households are composed of families.
- Two-fifths of households consist of married couples with children.
- Ethnicity is mostly white; however, the diversity of the population is increasing with its size.
- The median household income is \$77,444, which is above the national median.
- Two-thirds of residents aged 25 years and older have a degree or some college credit.
- Labor force participation is 73 percent, above average, and unemployment is low.

### Preferences

- Softball, or going to the zoo.
- Visiting theme parks (generally Sea World or Disney World)  
Favorite cable stations are Oxygen, E!, and the Discovery Health Channel.
- Residents prefer to listen to soft adult contemporary, sports, and classic hits radio.

## 4. Aspiring Young Families

### Demographics

- Approximately two-thirds of the households are families, 27 percent are single-person households, and nine percent are shared.
- Average family size is 3.12, near the US average.
- Annual population growth is 1.37 percent than the average U.S. population growth.
- Median age is 30.5 years old; one-fifth of residents are in their 20's.
- Ethnicity – 17 percent of residents are black, and 17 percent are of Hispanic.
- The median household income is \$50,392.
- 85 percent of residents aged 25 years and older have graduated from high school, 35 percent have attended college, and 22 percent hold a bachelor's or graduate degree.

### Preferences

- Residents spend time online with many activities including making travel arrangements.
- Vacations are likely to include visits to theme parks.
- Leisure time includes dining out, dancing, going to movies, attending professional football games, and fishing.
- Residents listen to urban stations and professional basketball games on the radio.

- When watching TV, they favor sports, news, entertainment programs, and courtroom TV shows.

### **5. In Style**

#### **Demographics**

- Most of these tourists live in the suburbs but prefer the city lifestyle.
- Married-couple families represent 54 percent of households. Households without children (married couples without children, single-person, shared, and other family types) comprise more than two-thirds of all households.
- Median age of 40.2 years old.
- There is little racial diversity in this market.
- Median household income of \$72,112.
- Nearly 40 percent of this demographic are aged 25 years and older hold a bachelor's or graduate degree, and 31 percent have attended college.
- Forty-five percent of employed tourists have professional or management positions, with above average concentrations in the finance, insurance, technical services, and education industry sectors.

#### **Preferences**

- Use the Internet daily; Online activities include obtaining information about real estate, new or used cars, medical issues, general news, or sports; tracking investments, trading stocks, making travel arrangements, and buying computer hardware or software, clothes, toys, and concert or sporting events tickets.
- They enjoy going to the beach, snorkeling, playing golf, and casino gambling.
- They favor domestic travel and keep golf in mind when choosing a vacation destination.
- Read boating, business, and finance magazines and listen to news-talk; classical, and alternative radio formats.
- TV viewing includes bicycle racing, ski jumping, and golf, so it is not surprising that the Golf Channel is a favorite cable station.

# SAVANNAH TOURISM MARKET DATA

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## Summary

### Summary

The tourism data that is presented substantiates the tourism market in Savannah; the tourism industry continues to be one of the largest economic drivers of Savannah. With millions of tourists per year, the area is a prime location to reach a large amount of people. Savannah provides a diverse offer to a tourist – from beautiful beaches to historic southern architecture to ghost tours – a typical Savannah visitor is not looking for the “theme park experience” and generally seek culture, history, and to be educated or learn something from their trip.

Touch screen interactive kiosks placed by the Savannah Area Convention and Visitors Bureau have been averaging approximately 15,000-16,000 taps per month. The State visitors center in Savannah saw an increase of 18.72 percent in visitorship from 2008 to 2009.

#### State Run Visitor Center Traffic

Center	2008	2009	% Change
Augusta	850,944	740,994	-12.92%
Columbus	544,838	473,672	-13.06%
Kingsland	1,630,241	1,674,152	2.69%
Lavonia	1,175,888	1,049,348	-10.76%
Plains	52,151	50,776	-2.64%
Ringgold	2,109,637	1,818,530	-13.80%
Savannah	1,487,435	1,662,806	11.79%
Sylvania	63,987	59,816	-6.52%
Tallapoosa	1,392,552	1,310,276	-5.91%
Valdosta	1,583,820	1,880,366	18.72%
West Point	643,831	646,069	0.35%
<b>Total</b>	<b>11,535,324</b>	<b>11,366,805</b>	<b>-1.46%</b>

Source: Georgia Tourism Board

In the past, Savannah was not marketed to families and demographics were skewed to an older demographic and couples romantic getaways, but more and more Savannah is looking to improve family tourist activities. Savannah presents a unique opportunity to reach the booming tourist market and local residents as well.

Forward Strategy

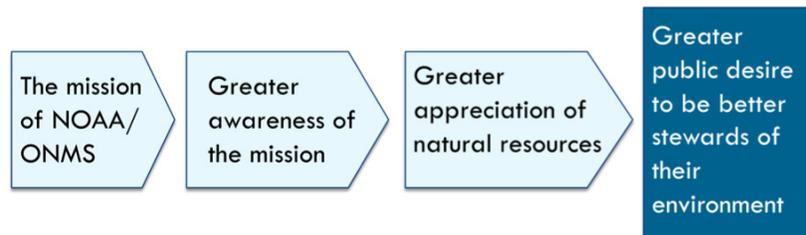
4



## INTRODUCTION

This chapter reviews the recommended strategic direction for developing a presence in the downtown Savannah Area. The market study has determined a definite community interest, and both the growing resident population and nearly seven million tourists annually certainly substantiate a satellite location(s). As an example of footfall in a peer facility, the Coastal Heritage Museum near downtown Savannah receives more than 400,000 visitors annually; on average many ONMS dedicated visitors centers are seeing foot traffic of 40,000 annually.

Community support for a GRNMS outreach project is strong; many external working group members thought the ocean conservation message was important and filled a niche market that does not yet exist in Savannah, and is of special importance to children. The mission of the National Marine Sanctuary System is to serve as the trustee for the nation's system of marine protected areas, to conserve, protect, and enhance their biodiversity, ecological integrity and cultural legacy.



*“Great content drives action”*

Many opportunities exist within the Savannah community landscape to expand presence and increase awareness of GRNMS and NOAA in the downtown area. The ONMS must consider options to consider when planning for a greater presence in Savannah, including:

- No Action/Continue As is; in this option, the sanctuary will continue to operate out of the current facilities.
- Staying at the current location and improving or expanding facilities and/or adding more programs or exhibits at this location.
- Construct or lease a new facility or storefront with or without partners.
- Implement and construct multiple mini-facilities and/or exhibits with partners.

# FORWARD STRATEGY

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## Introduction

- Provide a “virtual” presence by implementing an aggressive web presence along with placing multiple interactive kiosks, signs, or brochures throughout Savannah.

These options are not mutually exclusive; the GRNMS may consider a phased approach over the next several years to test the market and work towards a larger presence. During the future facility strategy phase of the project, the GRNMS will weigh the pros and cons of each option to choose a planning path that is successful, cost effective, and meets the vision and goals of the project. However, the mission and goals of the GRNMS option must align to current offer and demand in Savannah to be successful, and not try to compete with existing offerings. When comparing options, the ONMS should consider the following parameters:

- Availability – Is the option easily available and attainable for the ONMS to acquire?
- Location – Perhaps the most critical component, location will determine many of the other parameters.
- Accessibility – Is the option accessible and attainable; is parking considered?
- Cost Efficiency – Is the option cost effective and efficient to fulfill the parameter to reach the public?
- Local Outreach – Does the option meet the needs of the local resident population?
- Tourist Outreach – Does this option maximize the ability to reach tourists in areas that tourists visit?
- Children’s Education – Does this option have the ability to reach the specific needs of children?
- Partnership Opportunity – Does the option presents an opportunity to build or expand an existing or new partnership. Sharing costs with partners is often a more cost effective solution and allows the ONMS to tap into existing visitors or peers resources.

The following decision matrix analyses the previous options and parameters and their possible impact on the facility strategy.

Table 4.1: Decision Matrix

	No Action/ Continue As Is	Renovate In- Place-Expand facilities or exhibits	Acquire additional space/storefront with or without partner in downtown	Construct multiple "mini" storefronts at various partner locations	Implement a thorough signage, kiosk, and exhibit plan throughout downtown Savannah	Construct new facility
Availability	Green	Green	Green	Green	Green	Yellow
Location	Red	Red	Green	Green	Green	Yellow
Accessible	Yellow	Yellow	Green	Green	Green	Yellow
Cost and Efficiency	Green	Yellow	Yellow	Yellow	Yellow	Red
Local Outreach	Red	Yellow	Green	Green	Green	Green
Tourist Outreach	Red	Red	Green	Green	Green	Green
Children's Education	Red	Yellow	Green	Green	Green	Green
Partnership Opportunity	Red	Red	Green	Green	Green	Green

■ Solution will likely satisfy requirement  
■ May or may not satisfy requirement;  
 limitations apply to effectiveness  
■ Does not satisfy requirement

The following pages take a closer look at parameters that may help frame a discussion to determine what option(s) work best to accomplish the mission. These parameters are in line with the ONMS Facilities Master Plan 2009 and other sanctuaries facility strategies.

# FORWARD STRATEGY

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## Cost Considerations

### Partnerships

Museums, aquaria, and other environmental agencies are often seen as natural partners for the ONMS to bring the message to the public because they present unique and dynamic venues for the ONMS to display sanctuary and NOAA messages, and often have “built-in” visitors and school groups at the venue. There are several considerations to be made when entering facility or exhibit partnerships, including:

- **Message:** GRNMS must ensure that the message of the partner organization and facility meets those of NOAA and the marine sanctuaries.
- **Budget and long term financing:** A clear agreement must be made as to the responsibilities and financing of both the initial construction and long-term operation of the locations(s).
- **Cost effectiveness:** Make sure that the agreement is cost effective and makes sense. Long-term operations and maintenance of facilities, exhibits, signs, and kiosks must be considered during the planning phase, as well as programming and staffing costs.
- **Location:** Location is a serious consideration for the GRNMS outreach project. The avenue to reach a tourist is much different than that to reach a local; residents often do not visit tourist locations due to distance, parking, or crowds. Any location that is considered by the GRNMS for the outreach project should take into consideration the accessibility to both locals and tourists with adequate parking, and finding a location that meets the needs of both tourists and locals should be considered in the facility strategy phase.
- **Outreach and Education:** Consider who will be manning the facility or exhibit and if additional training will be needed. If educational programs are possible, GRNMS should analyze the cost of these programs, including staffing and travel time.

Partnerships are often a successful and cost effective method to reach the public, but the ONMS must clearly outline and plan expectations, funding and strategy early in the process to avoid pitfalls.

### Current GRNMS Partnerships

GRNMS has several good existing science and exhibit partnerships, including the following:

- Skidaway Institute of Oceanography
- Georgia Department of Natural Resources
- GAME

- University of Georgia
- Georgia State University
- Centers for Ocean Sciences Education Excellence
- Georgia Aquarium
- South Carolina Aquarium
- Tybee Island Marine Science Center
- The Fernbank Museum of Natural History
- The University of Georgia's Marine Education Center and Aquarium
- Georgia Southern University
- The South Carolina Aquarium
- Sapelo Island Visitor Center

As options for the project are developed, the GRNMS might look to existing partners, or look at potential new partners.

### **Potential Partnerships**

- Local “edutainment” tours and adventure trips – Savannah offers many local tours of tourist locations, boat tours, walking tours, bus tours, and wilderness tours.
- Nature and ecology-related coastal wildlife reserves and watersheds, including:
  - Tybee Marine Science Center
  - Oatland Island Education Center
  - Savannah-Ogeechee Canal Museum and Visitor Center
  - Bamboo Farms
  - Massie Heritage School
  - Savannah Wildlife Refuge
- Visitor and tourist centers – During market research, five visitor centers were found in or near Savannah, three are located in the downtown area.
- Museums – Savannah has many historic museums throughout the downtown area; tie ins might include history and maritime heritage and/or shipping industry
- Child-focused facilities such as the new children’s museum planned at the Coastal Heritage campus.
- Beaches – beaches are often good locations for signs.
- Malls and other retail business, such as City Market or Bass Pro Shops, often provide a captive audience.
- U.S. Coast Guard / U.S. National Park Service – the ONMS has often partnered with both the USCG and NPS at other sites; the missions of these organizations are similar.
- Georgia Ports Association

# FORWARD STRATEGY

## Cost Considerations

### Cost Considerations

#### Facility Related Costs

In addition to costs normally associated with buildings, including lease costs or construction costs, GRNMS must also consider long-term upkeep of facilities. Facility operations and maintenance (O&M) costs have become a major consideration for the ONMS when planning for a new facility, whether it is leased or owned. Operational cost for owned facilities is defined as costs for the total cost of building operations, including:

- Custodial service,
- Energy,
- Grounds,
- Maintenance & repair,
- Management,
- Pest control,
- Refuse,
- Road clearance,
- Security,
- Telecommunications,
- Water,

Average facility O&M costs for a typical office-type building are \$9.17 per square foot annually<sup>1</sup>. However, the national average cost of O&M per SF for a visitor center is \$17.10 per SF annually. In other words, the ONMS should plan for between \$10 and \$17 annually per square foot for any facility it leases or owns for facility O&M, and plan for higher O&M of visitor centers because of increased foot traffic, exhibits, and occupancy.

Another consideration to be made is leasing versus owning. There are factors that influence the decision to own versus lease. For example, leased facilities may have restrictions that can limit and/or have specific rules for signage and branding. Conversely, leasing opens the door for successful partnerships with local stakeholders, leading to a sharing of resources and knowledge.

Table 4.2 FY 2008-2009 Regional Building O&M Costs

FY2008-2009 Regional Building Operation Costs		Office Building, 2 Story	
Location	Dollars per SF	Local Operation Cost Index	
<b>Baseline Case: Washington, D.C.</b>	<b>\$11.02</b>	<b>100</b>	
Honolulu, HI	\$15.24	138.3	
Hilo, HI	\$14.67	133.2	
Worcester, MA	\$11.24	102	
San Francisco, CA	\$11.20	101.6	
Anchorage, AK	\$11.02	100	
Detroit, MI	\$10.33	93.7	
Milwaukee, WI	\$9.86	89.5	
Fort Lauderdale, FL	\$9.81	89	
Santa Barbara, CA	\$9.76	88.6	
Seattle, WA	\$9.60	87.1	
New Orleans, LA	\$9.33	84.7	
Savannah, GA	\$9.17	83.3	
Shreveport, LA	\$9.07	82.3	
Newport News, VA	\$8.88	80.6	
Charleston, SC	\$8.84	80.2	
<b>Average</b>	<b>\$10.56</b>	<b>95.9</b>	

<sup>1</sup> Figures referenced from the *Whitestone Building Operations Cost Reference 2008-2009 2<sup>nd</sup> Annual Edition*

# FORWARD STRATEGY

## Cost Considerations

The following table lists average lease rates per SF for many locations currently occupied by ONMS. Lease agreements are very difficult to project; this gives the GRNMS an idea of the average rates in the area as compared with the rest of the United States.

Table 4.3 Average Rentable Rates per SF per Year

<b>*2009 CLASS AA AVERAGE RENTABLE RATE / SQUARE FOOT / YEAR</b>				
<b>STATE</b>	<b>LOCATION</b>	<b>LOW</b>	<b>HIGH</b>	<b>AVERAGE</b>
CA	Bodega Bay	\$23.88	\$29.40	\$26.64
CA	Gualala	N/A	N/A	N/A
CA	Half Moon Bay	\$24.00	\$42.00	\$33.00
CA	Monterey	\$24.00	\$37.20	\$30.60
CA	Oxnard	\$18.00	\$33.00	\$25.50
CA	Point Arena	\$12.00	\$14.20	\$13.10
CA	Santa Barbara	\$24.50	\$39.40	\$30.50
CA	Santa Cruz	\$24.00	\$37.20	\$30.60
CA	San Francisco	\$25.20	\$110.00	\$50.91
FL	Key Largo / Key West	N/A	N/A	\$27.86
FL	Marathon	N/A	N/A	\$14.00
GA	Chatham County	\$18.60	\$26.00	\$22.30
HI	Maui County	\$30.20	\$90.00	\$60.10
HI	Kauai County	\$24.20	\$35.88	\$30.04
MA	Boston	\$45.00	\$65.00	\$50.00
MA	Gloucester	N/A	N/A	\$25.60
MA	Salem	\$19.50	\$29.00	\$24.25
MA	Scituate	N/A	N/A	\$22.00
MI	Alpena	\$8.50	\$14.90	\$11.70
NC	Cape Hatteras	\$14.00	\$18.90	\$16.45
TX	Galveston	\$12.00	\$37.50	\$24.75
VA	Hampton Roads	\$17.00	\$25.00	\$20.50
WA	La Push	N/A	N/A	N/A
WA	Port Angeles	\$15.00	\$24.80	\$19.90

Source: NAI Global and LoopNet

The previous facility costs do not take into account staffing costs; a typical visitor center requires at least two full-time staff members at approximately \$40,000 and up per year.

## Exhibits

If exhibits are planned as part of the GRNMS strategy, the cost associated with providing exhibits is usually a big consideration when planning for a new or updated exhibit. The cost for exhibits is usually an additional facility cost taken on by the ONMS and/or partner organizations, and includes exhibit design and planning, fabrication, and installation. The historical cost is typically around \$350 to \$650 per square foot of the space to be occupied by

# FORWARD STRATEGY

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## Cost Considerations

exhibits and is driven by the level of complexity of the design, ranging from static exhibits to something with a high level of media, technology, or live exhibits. As a general rule of thumb, about 40 percent of the total construction budget available for a project should be dedicated for exhibit planning, design, and installation.

Table 4.4 Exhibit Cost Ranges

Exhibit Cost Range *	
Static Exhibits	Approx. \$350 per SF
Interactive Exhibit	Approx. \$500-\$550 per SF
Living or High-tech Exhibit	Approx. \$600-\$650 per SF

\* *Seruto & Company*

For example, a 1,000 SF exhibit space in Washington, D.C., currently being planned by the ONMS is estimated to cost around \$350,000 for a static exhibit with a few interactive components. Historically, about 25-30 percent of the cost for an exhibit goes into the planning and design of the exhibit, with the remaining going toward physical fabrication and installation of the exhibit. Often ONMS visitor centers and storefronts utilize a combination of exhibit types.

Another cost to be considered is the life cycle cost of operating, maintaining, and repairing exhibits. Much like buildings, exhibits must be maintained and repaired throughout their life. While there is no industry standard for the costs associated with maintaining exhibits, several factors can help when planning exhibits that can determine the operational cost.

- **What is the construction budget?** This can drive the quality of materials, the level of technology, and other things that can affect the long-term operations cost of the exhibit. For example, constructing an exhibit from a higher cost material initially that is easier to maintain will save money in the long term. Also, the construction budget drives the level of complexity of the exhibit; a static exhibit is easier to maintain than one with media or moving parts.
- **What is the message?** While this may seem like a straightforward question, the end goal and message of an exhibit can really drive the complexity of the design, thus affecting the long term costs to operate the exhibit.
- **Who will be manning and maintaining the exhibit?** This includes docents or volunteers and maintenance staff. For example, a video presentation may need someone to consistently monitor and restart the video loop; a high technology or live exhibit may need dedicated specialty staff

to keep it running. If maintenance staff is not available for day-to-day maintenance, an outside vendor may need to be hired to run and keep up the technology or moving parts of an exhibit. This is an additional cost to be incurred by the user.

- **What is the tolerance of the organization for operations cost?** Because the ONMS may not be able to pinpoint funds that will be available for the operations budget at the onset of a project, a tolerance of what can be expended for operations should be understood at the onset of an exhibit project. Additionally, an agreement between the ONMS and a partner may need to be established that outlines who has responsibility for both cost and operations activities.

A more thorough and thoughtful exhibit planning and design process can help the ONMS determine what funding needs to be allocated toward long-term exhibit operations. Often, choices made early in the concept and design planning for exhibits can affect the long term operations cost of the exhibit; early planning can help the ONMS make decisions that best match the message, goals, and long term budget for the project. The ONMS should also make a formalized agreement with partners on exhibits both the ONMS' and the partner's financial involvement in operations and maintenance.

## Interactive Kiosks

The costs associated with NOAA's interactive kiosk program also have implications if GRNMS uses this option. This includes both first cost for fabrication and installation, and ongoing maintenance and other charges. The initial cost associated with a new kiosk is as follows:

- New Kiosk: Approximately \$30,000
- Additional units at a site that already has a kiosk:
  - Indoor unit: \$5,000
  - Outdoor unit: \$16,000

The initial expenditure for a kiosk can be somewhat costly, and the continued cost for maintenance of the software and hardware of the interactive kiosk, as well as unknown cost for upkeep, should also be considered. The cost for maintaining kiosks is often obtained from a sanctuary site's education budget, which takes away funding from these programs.

The following table illustrates a cost model for a sanctuary that is placing kiosks, and some of the costs that may be associated over the lifespan of the kiosk. The table assumes that site, like GRNMS, places two kiosks originally, and would then place an additional kiosk every three years. The life span is assumed at eight years, with major maintenance such as the replacement of

# FORWARD STRATEGY

## Cost Considerations

a hard drive or screen every four years. While this is not a real case, it has been provided to give an idea of the costs associated with kiosks and to help the ONMS plan for more interactive kiosks in the future.

Table 4.5 Lifecycle Cost Analyses for Kiosks

Kiosk Lifetime Operations Cost	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8
<b>Program, Design, and Install Kiosks (2)</b>	\$60,000							
<b>Yearly Programming and Maintenance Fee (3% escalation per year)</b>	\$850	\$876	\$902	\$929	\$957	\$985	\$1,015	\$1,045
<b>Annual Update (1 update per year x \$150 per hour x 8 hours x 2)</b>		\$2,400	\$2,400	\$3,600	\$3,600	\$3,600	\$4,800	\$4,800
<b>Unplanned Maintenance (example: replace monitor x 2)</b>				\$3,000			\$3,000	
<b>Place New Additional Kiosk (Indoor)</b>			\$5,000			\$5,000		
<b>Subtotal</b>	<b>\$60,850.00</b>	<b>\$3,276</b>	<b>\$8,302</b>	<b>\$7,529</b>	<b>\$4,556.68</b>	<b>\$9,585</b>	<b>\$8,815</b>	<b>\$5,845</b>
							<b>Total</b>	<b>\$108,758</b>

The chart illustrates the possible cost for maintaining a kiosk is consistent and potentially uses funds that could be allocated to outreach and educational programming.

## Cost Summary

The following cost summary is a collection of all costs previously discussed and applying them to a baseline case – an ONMS visitor center. The baseline case analyzes several visitor center sizes and uses average costs. These costs may or may not be directly applicable to each specific case, but give an idea of total cost.

Table 4.5 Baseline Cost Analysis

Baseline Costs of a Visitor Center	Facility Square Footage			
	1,000	2,500	5,000	10,000
<b>Interactive Kiosk @ \$30k + \$850 Yearly O&amp;M</b>	\$30,850	\$30,850	\$30,850	\$30,850
<b>Rent @ \$22.30 / SF / Year</b>	\$22,300	\$55,750	\$111,500	\$223,000
<b>O&amp;M @ \$17.10 / SF / Year</b>	\$17,100	\$42,750	\$85,500	\$171,000
<b>Salary @ 2 FT @ 50,000</b>	\$100,000	\$100,000	\$100,000	\$100,000
<b>Exhibits @ \$350 / SF for Static Exhibits</b>	\$350,000	\$875,000	\$1,750,000	\$3,500,000
<b>Total</b>	<b>\$520,250</b>	<b>\$1,104,350</b>	<b>\$2,077,850</b>	<b>\$4,024,850</b>

\* Does not include furniture, fixtures, and equipment, unforeseen costs or repairs, contingency, or escalation

### Summary

The market study aims to lay the groundwork for a future facility strategy project at GRNMS by analyzing the market and determining if the tourist and resident market substantiates an investment at the site. Any contribution made by the GRNMS to the local eco-tourism would be welcomed and likely successful. The options presented previously are not mutually exclusive and could be developed as a phased approach that plans a logical combination of steps to work up to an eventual final option that would maximize potential outreach and partnerships. GRNMS can work to grow into downtown Savannah and as public and community support grows, so will outreach opportunities and depth of presence in the area.

Original thinking for the project looked at the River Street as the preferred option, but market research has determined that other locations are possible and that the ONMS should analyze all options to find a long-term facility strategy that determines a set of logical steps to implement a systematic approach to outreach and marketing.

# FORWARD STRATEGY

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## INTRODUCTION

**T**his chapter includes all supplemental project information.

## November 3, 2009 Conference Call Meeting Minutes

Meeting Minutes		
<b>Client:</b> NOAA (National Oceanic and Atmospheric Administration)		
<b>Project:</b> Savannah Downtown Outreach Project – NOS Gray’s Reef National Marine Sanctuary		
<b>Location:</b> Conference Call	<b>Date:</b> November 3, 2009	<b>Time:</b> 9:30 AM EST
<b>Purpose:</b> Kick-off teleconference for the project		

### Attendees:

Contact Name	Title	Organization	Email	Telephone
Ted Lillestolen	<i>Deputy Director</i>	Office of National Marine Sanctuaries	Ted.Lillestolen@noaa.gov	(301) 713-3125 X 253 Cell (301) 580-3767
Cheryl A. Oliver	<i>NOAA Preserve America Initiative/Exhibit Team Lead</i>	Office of National Marine Sanctuaries	Cheryl.Oliver@noaa.gov	(301) 713-3125 ext. 258 Direct: (301) 713-7258
Chris Ostrom	<i>Facilities Coordinator</i>	Office of National Marine Sanctuaries	Chris.Ostrom@noaa.gov	(301)713-3125, ext 260 Cell (240) 535-2457
Matt Stout	<i>Chief, Communications Division</i>	Office of National Marine Sanctuaries	Matthew.Stout@noaa.gov	(301) 713-3125 X 273 Cell (240) 461-8450; (202) 482-5311
McKeeby, Rosemarie	<i>Exhibit Team Lead (West Coast)</i>	Office of National Marine Sanctuaries	Rosemarie.McKeeby@noaa.gov	(301) 713-3125 X 266
Cathy J. Sakas	<i>Education Coordinator</i>	GRNMS	Cathy.Sakas@noaa.gov	(912) 598-2345
George Sedberry	<i>Superintendent</i>	GRNMS	george.sedberry@noaa.gov	(912) 598-2439 cell: (912) 308 5193
Gail Krueger	<i>Outreach Coordinator</i>	GRNMS	gail.krueger@noaa.gov	(912) 598-2397
Billy Causey	<i>Regional Director - SE</i>	Office of National Marine Sanctuaries	billy.causey@noaa.gov	(305) 809-4670 Ext. 234

Venetia Butler	<i>Instructional Science Education Consultant &amp; K-12 Education Representative on the Gray's Reef National Marine Sanctuary Advisory Council</i>		venetiabutler@bellsouth.net	(912) 786-4288 Cell: (912) 224-0979
Doug Lowe	<i>President</i>	Facility Programming & Consulting	<a href="mailto:douglowe@facilityprogramming.com">douglowe@facilityprogramming.com</a>	(210) 228-9600
Leandra Tupa	<i>Programmer</i>	Facility Programming & Consulting	<a href="mailto:leandratupa@facilityprogramming.com">leandratupa@facilityprogramming.com</a>	(210) 228-9600
Stacey Güney	<i>Market Researcher</i>	Facility Programming & Consulting	<a href="mailto:staceyguney@facilityprogramming.com">staceyguney@facilityprogramming.com</a>	(210) 228-9600

**Review of Previous Action Items - N/A Discussion**

**Topic 1: Contract Vehicle and Project Vision**

Doug Lowe (DL) of Facility Programming facilitated the conference call. He started by outlining the project and the contract vehicle for it. While the contract reflects two parts to the study, the project will be undertaken as a seamless whole whereby information from the first part of the project (the market study) will automatically inform recommendations and move in to the second part of the project whereby these recommendations will be formed into a forward planning, strategy and implementation plan. DL then outlined a vision for the project. The project will focus on how to reach out more effectively to certain groups. It will determine exactly what groups this entails and inform the type of message it should be. The message will continue to be an outlet for the “One NOAA” concept and the overarching message of the ONMS. The market research will inform a plan to effect outreach, education, research and conservation efforts. The market study should understand the impact of the market in which the Sanctuary is dealing, which in turn will inform the marketing strategy. Matt Stout (MS) agreed that this was an accurate description of the project and added that it would also provide information on who to partner with and where to place outreach activities. Ted Lillestolen (TL) asked for clarification on the contract vehicle. DL explained that while the contract vehicle was in two parts, that the project would move directly forward from the clear, fact –based analysis of the market research to an action plan with enough detail to pursue the recommended path (whether that include exhibit design or hiring of a leasing broker as examples). George Sedberry (GS) highlighted that this would be a collaborative balance between the questions “What is our

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market?” and “What do we want to do?” GS stated that he would like the “market” to be viewed as everybody – both tourist and residents. He sees that there are visitors who come to learn about the region and that there are visitors who come specifically for the beach. He would like to explore the market potential of both options. DL requested that each member of the working group submit what their “vision” for the project would be.

<b>Action Item(s)</b>	<b>Who</b>	<b>When</b>
Working group members to outline project vision	Facility Programming (SG) to develop questionnaire for working group to inform the market research study	Questionnaire to be developed and distributed to working group by 11/16; responses requested by 12/1

## **Topic 2: Work Plan / Data & Research**

DL outlined the work plan for the market research study. It will include data collection/mining, a collaborative workshop and smaller, breakaway groups to discuss specific topics. He requested that any available data or reports that are already available and known to the working group be forwarded to Facility Programming. MS agreed there were some previous reports that may well be applicable, including a section in the management plan that dealt with the visitor’s center. GS also mentioned that he was aware of previous studies that may be available. DL also asked for members to begin considering whom they would want to include into the workshop as well as potential partners. DL also asked the working group if they thought there were any success stories that they would consider useful in the development of the project. MS mentioned that perhaps Thunder Bay and Hilo might be useful examples. Cathy Sakas did stress that those examples were small communities with not much in the way of competition and that the Savannah market was significantly different. DL also asked for some background information in light of the previous politics surrounding the project. MS and GS clarified the previous situation. TL stressed that the key to success in this instance maintaining objectivity will help to avoid hurdles. DL requested that the data research phase of the project take place before the workshop to help inform topics and discussion. The group discussed that it was more important that the project be run well and that the timeline was flexible. The group decided to set out a few dates in January and establish availability to pursue scheduling the workshop. Venetia Butler sought clarification about the forming of her working group. She will go ahead and begin assembling her group to look at ideas for the visitor’s center and identifying internal and external stakeholders. The group discussed that the workshop would

most likely be two full days that would include a four-hour workshop, six to eight breakout sessions and site visits.

<b>Action Item(s)</b>	<b>Who</b>	<b>When</b>
Facility Programming will revise the timeline and tasking schedule to reflect the data gathering to take place before the workshop.	SG	Will include revised schedule by 11/16
January dates will be circulated to establish availability of working group members	SG	Will include list of available dates with group questionnaire (as above)

**Next meeting: Teleconference as required before January TBD Workshop**

## Project Teleconference Meeting Minutes

January 26, 2010

Meeting Minutes		
<b>Client:</b> NOAA (National Oceanic and Atmospheric Administration)		
<b>Project:</b> Savannah Downtown Outreach Project – Gray’s Reef National Marine Sanctuary		
<b>Location:</b> Conference Call	<b>Date:</b> January 26, 2010	<b>Time:</b> 4:00 PM EST
<b>Purpose:</b> Teleconference to touch base on the project		

### Attendees:

Contact Name	Title	Organization	Email	Telephone
Cathy J. Sakas	<i>Education Coordinator</i>	GRNMS	Cathy.Sakas@noaa.gov	(912) 598-2345
George Sedberry	<i>Superintendent</i>	GRNMS	george.sedberry@noaa.gov	(912) 598-2439 cell: (912) 308 5193
Gail Krueger	<i>Outreach Coordinator</i>	GRNMS	gail.krueger@noaa.gov	(912) 598-2397
Venetia Butler	<i>Instructional Science Education Consultant &amp; K-12 Education Representative on the Gray's Reef National Marine Sanctuary Advisory Council</i>		venetiabutler@bellsouth.net	(912) 786-4288 Cell: (912) 224-0979
Doug Lowe	<i>President</i>	Facility Programming & Consulting	douglowe@facilityprogramming.com	(210) 228-9600
Leandra Tupa	<i>Programmer</i>	Facility Programming & Consulting	leandratupa@facilityprogramming.com	(210) 228-9600
Stacey Güney	<i>Market Researcher</i>	Facility Programming & Consulting	staceyguney@facilityprogramming.com	(210) 228-9600

### Review of Previous Action Items - N/A

### Discussion

Stacey Güney (SG) of Facility Programming facilitated the conference call.

George Sedberry (GS) reviewed an email from Dan Coffee, the Director of the Savannah International Trade and Convention Center. The email identifies the convention center located on Hutchinson Island as a possible partner for an ONMS marine-related exhibit. There are pros and cons of this potential opportunity that could be included in the market study.

- The island is only accessible by ferry.
- There is not big visitorship to the island at present (only conventions).
- Good location for marine exhibits because it is surrounded by water.
- An ONMS exhibit could encourage tourism to the island outside conventions.
- Possible exhibits include Science on a Sphere or a photo exhibit.
- Could tap into convention demographic (both local and outside).

SG identified several groups she has contacted or plans to contact in the preliminary research phase of the project to frame discussion for the kickoff in February. Included are:

- The Savannah Area Convention and Visitor's Bureau
- Airport Visitor Information Center
- River Street Association (Kenny Hill)
- Rhett Bell at the Mayor's office (could possible point to someone with better info)
- Tybee Island Visitor Information Center
- River Street Hospitality Center
- Savannah Visitor Information Center

SG also mentioned that she plans to contact a sampling from many other cultural centers and tours groups in the area. The initial data gathering calls are to introduce the project to external stakeholders and get their general thoughts on a GRNMS presence in downtown Savannah and how this would best be accomplished to convey the right message and reach the right people. The information gathered from the calls will be presented in February to frame discussions on the vision for the project.

The questionnaire distributed to the outside working group should ask basic questions regarding general knowledge of GRNMS and its mission, demographic and visitorship information, possible competitors/partners, and how a satellite GRNMS location could align it's mission with the market it is targeting. GS reinforced that the primary goal or experience of the typical Savannah visitor is educational. He thought that a secondary experience would be

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a beach experience for those that come to Savannah to go to the beach.

<b>Action Item(s)</b>	<b>Who</b>	<b>When</b>
Completed questionnaire to send to outside stake holders	Facility Programming (SG) to develop questionnaire to inform the market research study	Questionnaire to be developed and distributed to working group by 1/27

The call ended with discussion of dates for the kickoff workshop. February 22-24<sup>th</sup> were identified as the best option. The schedule would be a group meeting in the morning of the 22<sup>nd</sup> with afternoon site visits. The morning of the 23<sup>rd</sup> will be a workshop with other community invitees.

Venetia Butler asked a question on who the working group should be at this point. SG clarified that at this point there are two working groups, both internal and external, and that the external group would likely be better determined after the initial calls and kickoff meeting.

## **Internal Working Group Visioning Session Meeting Notes**

**February 22, 2010**

### **MISSION/CORE VALUES**

- Link the research and science to reach tourists.

### **LOCATION(S)**

How is the message relayed or diluted in a dedicated facility versus being in a partner facility.

- Cal Academy is an example (great exhibit but is the message diluted or lost?)
- What is the biggest "bang for your buck" in Savannah?
- Multiple "mini facilities" could be a possibility
- Skidaway Island location isn't working for outreach/education purposes.
  - Beefing up current location is not an option; distance would still be the issue.

### **Location Options**

- Current Location (Skidaway)
- Events
- New home/consolidated facility
- Stand alone facility downtown
- Multiple mini-facilities (with partners)
- Kiosks/Signs
- Ship (floating visitor center in the water)
- Virtual/brochures/word of mouth/tours/video and films

### **Facility Options**

- Partner at their place(s) (partner facility)
- Partner at your place (partner at a NOAA owned or leased facility)
  - Go it alone (a NOAA owned or leased facility with no partner)

### **TARGET AUDIENCE AND HOW TO REACH THEM**

- Tourists
- Local residents
- Business/Conventions
- Children
- NOAA should understand the market very clearly before jumping on a decision.

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- Are you going for quantity of people or quality of message/retention?

## **BENCHMARK**

- Papahānaumokuākea Marine National Monument Discovery Center in Hilo is a storefront that is primarily student-focused (local population, not tourist destination).
  - The storefront in Hilo has a classroom.
- The visitor center being implemented in Lahaina will be more focused on tourist traffic and gains additional audience (similar to Savannah).
- Hawaiian Islands Humpback Whale National Marine Sanctuary in Oahu, HI – has a similar set of criteria/problems as Savannah (busy tourist traffic but only have an administrative office at this time).
- How do other ONMS visitor centers support O&M costs?
  - There is no rule that NOAA can't charge an entrance fee to their visitor centers, but the system has made a decision not to charge a fee at dedicated visitor centers.
  - NOAA does ask for contributions/donations at visitor centers and storefronts.
  - Can find ways to help with O&M through friends/members of the National Marine Sanctuary Foundation.

## **EXHIBITS**

- Science on a Sphere
  - Could be a big draw for both target audiences.
- Technology to connect people to the sanctuary/reef; draw attention to science and research efforts.
  - Live camera feeds
  - Telepresence
  - Live Exhibits
- Conservation and sustainability messages.

## **OPPORTUNITIES**

- Preserve America/Budget-possible funding opportunity through external grant.
- Savannah College of Art and Design (SCAD)
  - May be willing to help with graphic design/brochures/art for GRNMS.
- Options for outreach (opportunities)
  - Kiosks/displays/signs
  - Telepresence
  - Live research

- Events
- Classrooms - kids/adults
- Theater
- Ship-floating visitor center

### **PARTNERSHIPS/POSSIBLE PARTNERS**

- Bamboo Farms
  - Lots of events at Bamboo Farm that draw a lot of locals.
- Children's Museum/Complex at Coastal Heritage Society
  - Have 60,000 square feet available of shell space; the location has potential.
  - Have used a top national exhibit designer to help conceptualize exhibits for the museum.
  - Has built-in visitor traffic.
  - Children's museum is marine-focused.
- Tybee Island Marine Science Center
- Bass Pro Shop

### **ROADBLOCKS**

- Be mindful of operations, maintenance, and staffing costs and how they are to be funded in the long-term.
- Reaching tourists vs. reaching locals - locals don't visit the tourist locations/areas as much, so location is vital.
- ONMS should avoid just jumping in the market blindly; should build slowly and deliberately.

## **External Working Group Visioning Session Meeting Notes**

**February 23, 2010**

### **POSSIBLE ROADBLOCKS**

- O&M cost, staffing, construction cost should be considered.
  - Identifying partner to help with this is difficult; often one entity is responsible for these costs.

### **ADVICE/EXPERIENCE**

- ONMS is unlikely to develop a location that can successfully reaches all market shares (tourists, locals, kids).
- Inventory existing overlap opportunities and develop a strategy that utilizes all possible opportunities in a systematic way.
  - Don't repeat something that is already there.
  - Multiple solutions to target a broader range and draw from different dynamics are likely to be more successful.
- Location must be somewhere that both markets can be reached-downtown is looking to be the best area.
  - GRNMS must have a single "PLACE" whether or not the bigger experience touches multiple sites. If locations are spread the message is diluted and there is no one central location where people can go for information.
- Go to other places (partner locations) and see how NOAA can enhance other experiences.
  - See NOAA at multiple stops that people make; seeing it over and over will drive the message that it is a bigger thing.

### **TARGET MARKET / AUDIENCE**

- Increase knowledge of NOAA and all it's activities.
  - Weather Service/climate change
- There is a large population that the marine sanctuary touches; how can GRNMS reach more people and increase market share?
  - Showcase the uniqueness of Gray's Reef and other sites.
  - Make the educational experience available to everyone.
- Must reach both locals and tourists and make the information to both markets.
  - Must be careful with location
  - Most locals don't like to go downtown (traffic, parking)
  - Make it accessible to all
  - Parking is important

- “Engage people by accident”
- Visitors can be subdivided into smaller groups (adults, families, children).
  - Children under the age of 10 (75,000); under five will soon become the largest market of residents in the Savannah area.
  - A children's museum is currently being planned at the Coastal Heritage Society campus.
    - Will provide an underwater adventure/archaeology experience for kids.
    - A Gray's Reef component has been included in the plans for the museum; support is needed from NOAA in terms of funding.
    - The children's museum concept has been received with much enthusiasm in the local community.

### **PARTNERSHIPS**

- Marine education entities in the Savannah area are a possible partner.
  - Science and Research entities
  - Exporting marine education and science/research to a broader audience is a vision for the project.
- Oatland has been successful at reaching locals and tourists because of location and parking availability.
- Would partners welcome the GRNMS message?
  - Must have mutual benefit and similar message.
- Ships of the Sea
- Tybee Island
- Children's Museum

### **OUTREACH METHODS**

- Technology is a great way to reach kids (attractive).
- Film festival was very successful in the past at attracting people to marine message, but has since moved to Monterey.
- ONMS should have the ability to go to multiple places dependent on the needs of the visitor.
  - Cater to the needs of the visitor and create an experience.
- Activities versus static displays or signs.

### **LOCATIONS**

- GRNMS satellite location needs to be where the highest concentration of people are (which is likely the downtown area).

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- Think about the different demographics and ability to hit more people with multiple locations.
- Downtown versus fringe of downtown
  - Locals are more willing to go the “edge” of the downtown area.
  - Downtown is a Savannah identity – this is what people think of about Savannah area.
  - Is water access important to GRNMS?
- Forsythe Park
- Trustee's Garden
  - Possible tie-in to conservation/sustainability.
- Hutchinson Island
- Must look into the future when planning locations.
  - For example the possible future arena that is being considered in downtown Savannah.

## **OPPORTUNITIES**

- Make the National Marine Sanctuary System virtually available to everyone-make it possible for people to see all of the sites.
  - Compare and contrast the different sites.
  - Have the ability to see Gray's Reef and what goes on there.
- Present the challenges facing the ocean and possible solutions (conservation)
  - Way to differentiate possible location(s).
  - Define the challenge and put forth solutions.
  - Climate change and weather is important; must use this opportunity to exploit this because Savannah does not have something with this message.
- Mobility of the message of Gray's Reef
  - Technology (Twitter, Facebook, RSS feeds)
  - Reach your audience using what they use
  - Airport, road side
  - Can be used to maintain the message once people go home.
- Savannah visitors are looking for an experience and willing to go find it.
  - Visitors are after an active experience, not passive.
  - People will remember where they were when they learned something important.
- What are other NOAA activities that could be exploited?
  - Fisheries
  - Weather

- Maritime and shipping industry, ports, regulations
- How does NOAA fit in to this bigger picture? Definite tie-in
- They do work with all entities to manage this resource.
- NOAA does manage many of the regulations; this could be a great story to tell in downtown river front area because it's visible.
- Messaging that relates to all could be worked in to whatever is done.
- Local existing visitors centers, museums, eco-groups are a more credible source of information than media, universities, etc.
  - Don't confuse the message at partner locations.

## Contact List – Interviews

### Charters

Name
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Amick's Deep Sea Fishing
Brown's "RealEmN" Deep Sea Fishing
Bull River Cruises
Capt. David Newlin Fishing Charters
Chimney Creek Charters
Coastal River Charters
Compass Sailing, LLC
Hogan's Marina
Isle of Hope Marina
Lazaretto Creek Marina
Marshland Inshore Fishing Adventures
Miss Judy Charters
Sail Harbor Marina & Boatyard
Savannah Coastal Charters
Scales and Tails, Inc.
Sea Kayak Georgia
Sundial Nature & Fishing Tours
Sweet Lowland Charters
Tybee Island Bait & Tackle
Tybee Island Charters
The Club at Savannah Harbor
Crosswinds Golf Club
Henderson Golf Course
Palmetto Dunes Oceanfront Resort
Savannah Quarters Country Club
Southbridge Golf Club
Bass Pro Shops Outdoor World
Celestial Waters Holistic Spa
Curves at Savannah Mall
Fleet Feet Sports
Greenbrier Spa

## Tours

Name
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Carriage Tours of Savannah
Dolphin Magic, LLC
Hearse Ghost Ride
Historic Savannah Carriage Tours
Islands Bikes & Boards
Miss Judy Charters
Oglethorpe Trolley Tours
Old Town Trolley Tours
A Walk Through Savannah Johnson Square
Adventures in Savannah
All In One Destinations, Inc.
Alligators Galore Tours
America's Most Haunted City
Audio Walking Tour: The Story of Savannah @ Visitors Center
Architectural Tours of Savannah
Authentic Victorian Tours
Bonaventure Cemetery Tours
Bull River Cruises
Bull River Marina
Butterducks Winery
Carriage Tours of Savannah
City Comber LLC
City Trex
Civil War Savannah-presented by The Savannah Walks, Inc.
Classic Car Tours of Savannah
Day Clean Journeys
Discover Savannah
Discover Tours
Dolphin Magic Tours, Inc.
Foody Tour
Freedom Trail Tour
Ghost Talk Ghost Walk + Other WalkingTours, Etc.
Ghost Tours of Savannah-presented bt the Savannah Walks, Inc.
Ghost & Legends of Savannah
Ginny Howell Tours
Golden Isles Touring
Greenfeet Walkabouts Meet at Smooth on Bull Street
Hautings Tour, Inc.
Hearse Ghost Ride Tours
Historic Savannah Carriage Tours
Jon Sharp's Walking History Tour

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**Name**

Kelly Tours  
Meinhardt Vineyards & Winery  
The Midnight Tour  
Mikki's Tours by Taste  
Oglethorpe Haunted Tours  
Oglethorpe Trolley Tours  
Old Savannah Tours, Inc  
Old Town Trolley Tours of Savannah  
Personalized Tours of Savannah  
Plantation Carriage  
River Street Riverboat Company (Savannah River Queen/Georgia Queen)  
Savannah By Foot  
Savannah Fun Tours  
Savannah Haunted History Tours  
Savannah Haunted Pub Crawl  
Savannah Heritage Tour  
Savannah Movie Tours  
Savannah Photo Outings  
Savannah Port Tours  
Savannah Sojourns Walking Tours  
"The Savannah Story Tour" @ Savannah Visitors Center  
Savannah The Walking City  
The Savannah Walks, Inc.  
Sea Kayak Georgia  
See Savannah Walking Tour, Inc.  
Sixth Sense Savannah  
Sorrel-Weed House Tours  
Southern Hospital Tours, Inc.  
Tales of the South  
Tootsy Tours, Inc.  
Tours By BJ  
Victorian Lady Tours  
Wilderness Southeast, Inc.  
Zodiac Adventure Tours

## Visitors Centers

### Name

Savannah Visitor Information Center  
 River Street Hospitality Center  
 Tybee Island Visitor Information Center  
 Savannah Airport Visitor Information Center  
 Savannah Area Convention and Visitors Bureau  
 DK Shifflet & Associates

## Museum and Cultural

### Name

**Davenport House Museum**  
**Hurn Museum-Contemporary**  
**Massie Heritage Center**  
**Massie Heritage Interpretation Center**  
**Mighty 8th Air Force**  
**Owens Thomas House Museum**  
**Ralph Mark Gilbert Civil Rights Museum**  
**Roundhouse Railroad Museum**  
**Savannah History Museum**  
**Savannah Ogeechee Canal Museum & Nature Center**  
**Savannah Science Museum**  
**Ships of the Sea Maritime Museum**  
**Thunderbolt Museum Society Inc**  
 Andrew Low House  
 Beach Institute  
 Bethesda Home for Boys  
 Bonaventure Cemetery  
 Cathedral of St. John Baptist  
 Christ Episcopal Church  
     Colonial Park Cemetery  
 Davenport House Museum  
 First African Baptist Church  
 First African Baptist Church  
 Flannery O'Connor Childhood Home  
 Fort Pulaski Monument  
 Georgia Historical Society  
 Ralph Mark Gilbert Civil Rights Museum  
 Green-Meldrim House  
 King-Tisdale Cottage  
 Juliette Gordon Low National Girl Scout Center  
 Laurel Grove Cemetery-North & South

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Name
Massie Heritage Interpretation Center
Mereer Williams House Museum
Mighty Eighth Air Force
Oatland Island Wildlife Center
Old Front Jackson
Roundhouse Railroad Museum
Saint Phillip Monumental AME Church
Savannah Area Council of Garden Clubs Botanical Garden
Savannah History Museum
Savannah-Ogeechee Canal Museum
Savannah Theatre
Second African Baptist Church
Ships of the Sea Maritime Museum
Telfair Academy
Telfair's Jepson Center for the Arts
Telfair's Owens-Thomas House Museum
Temple Mickve Isreal
Tybee Island Lighthouse & Museum
Tybee Island Marine Science Center
Wormsloe Historic Site

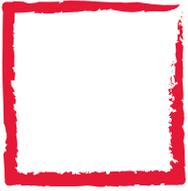
## External Working Group Contacts

<b>Last Name</b>	<b>First Name</b>	<b>Organization</b>
<b>Alberg</b>	Dave	Superintendent, Monitor National Marine Sanctuary
<b>Angela</b>	Mary	Savannah Heritage Tours
<b>Atkinson</b>	Cort	
<b>Bell</b>	Carol	City of Savannah and Board of Directors, Leadership Savannah
<b>Bell</b>	Bret	Savannah Mayor's office
<b>Brynn</b>	Grant	Executive Director, The Creative Coast Alliance
<b>Coffey</b>	Bob	Savannah International Trade and Convention Center
<b>Elliot</b>	Shiela	District Director, Congressman Jack Kingston
<b>Fulford</b>	Kristen	Constituent Outreach Director, Congressman John Barrow
<b>Hill</b>	Kenny	Executive Director of the Savannah Waterfront Association
<b>Hooten</b>	Stephen	Second Vice President, Citi Smith Barney
<b>Jordan</b>	Michael	Coastal Heritage Society
<b>Lepo-Wieniewitz</b>	Jill	Thunderbolt Marine Science Elementary School
<b>Magwood, III</b>	Horace	Director of Science Instruction, Savannah-Chatham Public Schools--also interim Director of Oatland Island Wildlife Center of Savannah
<b>Marinelli</b>	Joe	Savannah Visitors and Convention Beureau
<b>Merriman</b>	Bill	Sapelo Visitor Center Manager
<b>Morrison</b>	Howard	
<b>Ochoa</b>	Amy	Savannah Wildlife Refuge
<b>Procopio</b>	Maria	Director, Tybee Island Marine Science Center
<b>Russell</b>	Margaret Mary	Office Manager, Savannah Chamber of Commerce and contact for Leadership Savannah
<b>Smith</b>	Scott	Coastal Heritage Society
<b>Williams</b>	Bob	UGA Marine Education Center and Aquarium

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FACILITY  
PROGRAMMING  
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Architectural Programming  
Laboratory Planning  
Healthcare Planning  
Strategic Facilities Planning  
Needs Assessment  
Space Utilization Analysis

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