

**SPECIAL COUNCIL MEETING
JOINT WORKSHOP with
Chincoteague to Assateague Beach Access Committee**

A G E N D A

TOWN OF CHINCOTEAGUE

September 13, 2012, 5:00 P.M. - Council Conference Room - Town Hall

CALL TO ORDER

INVOCATION BY COUNCILMAN TAYLOR

PLEDGE OF ALLEGIANCE

AGENDA ADDITIONS/DELETIONS AND ADOPTION:

1. Guest Speaker – (Mr. James Caudill, Mr. Edward Maillett)
Presentation of FWS Chincoteague Baseline Economic Analysis
2. Review of Draft Beach Access Newsletter
3. Mayor and Council Comments

ADJOURN:

Chincoteague National Wildlife Refuge
Socio-Demographics and Economic Impact Analysis
In Support of Comprehensive Conservation Plan

Prepared by:

Division of Economics

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Arlington VA

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1.0 Introduction

The National Wildlife Refuge System Improvement Act of 1997 requires all units of the National Wildlife Refuge System to be managed under a Comprehensive Conservation Plan (CCP). The CCP must describe the desired future conditions of a refuge and provide long-range guidance and management direction to achieve refuge purposes. The U.S. Fish and Wildlife Service is in the process of developing a range of management goals, objectives, and strategies for the Chincoteague and Wallops Island National Wildlife Refuges CCP. The CCP for the refuge must contain an analysis of expected effects associated with current and proposed refuge management strategies.

Chincoteague NWR (CNWR) was established on May 13, 1943 through acquisition of 8,808 acres under authority of the Migratory Bird Conservation Act. The Assistant Secretary of the Interior determined that FWS ownership of this land was necessary for protection during nesting and migration seasons of all those species of wildlife determined as being of great value as a source of food, or in destroying of injurious insects, or nevertheless in danger of extermination through lack of adequate protection (U.S. District Court 1943). The Migratory Bird Conservation Commission (MBCC) initially approved the Refuge at a meeting on March 25, 1941, acknowledging the importance of Assateague Island important wintering habitat for migrating greater snow goose, and nesting habitat for black ducks, shorebirds, and migratory birds (MBCC 1941). At that time they also approved acquisition of Jerico and Hebron Islands, two small marshes adjacent to Assateague Island, just north of the Virginia boundary in Maryland.

Since 1943, numerous tracts of land have been added to CNWR. All lands have been purchased with money from either the Migratory Bird Conservation Fund or the Land and Water Conservation Fund. Federal title of these lands is acquired to the mean low water line. In 1990 Assawoman and portions of Metompkin Island (1,608.5 acres total) were purchased with Land and Water Conservation Funds, which come from royalties on off-shore oil drilling.

Refuge purposes are taken from enabling legislation and acquisition authorities for a particular refuge and from Congressional legislation affecting the refuge system as a whole. CNWR purposes include: preserving and enhancing endangered species; protecting and enhancing habitat for migratory and non-migratory species; maintaining indigenous species; and, providing opportunities for wildlife-dependent recreation (CNWR 1993). The Service database (<http://refugedata.fws.gov/databases/purposes>) lists the following Refuge Purposes for CNWR:

“... for use as an inviolate sanctuary, or for any other management purpose, for migratory birds.” (16 U.S.C. 715d) (Migratory Bird Conservation Act).

“...suitable for B (1) incidental fish and wildlife-oriented recreational development, (2) the protection of natural resources, (3) the conservation of endangered species or threatened species...(16 U.S.C. 460k-1) “...the Secretary ... may accept and use real ... property. Such acceptance may be accomplished under the terms and conditions of restrictive covenants imposed by donors ...” (16 U.S.C. 460k-2) Refuge Recreation Act (16 U.S.C. 460k-460k-4), as amended.

“... the conservation of the wetlands of the Nation in order to maintain the public benefits they provide and to help fulfill international obligations contained in various migratory bird treaties and conventions ...”(16 U.S.C. 3901(b), 100 Stat. 3583 Emergency Wetlands Resources Act of 1986)

“... for the development, advancement, management, conservation, and protection of fish and wildlife resources ...” (16 U.S.C. 742f(a)(4) “... for the benefit of the United States Fish and

Wildlife Service, in performing its activities and services. Such acceptance may be subject to the terms of any restrictive or affirmative covenant, or condition of servitude ..." (16 U.S.C. § 742f(b)(1) (Fish and Wildlife Act of 1956)

"... for conservation purposes ..." (7 U.S.C. 2002 (Consolidated Farm and Rural Development Act))

In 1997, Congress passed the landmark National Wildlife Refuge System Improvement Act (NWRISA) establishing a unifying mission and a wildlife-first mandate for the Refuge System. The NWRISA affirmed that: refuges are anchors for biodiversity and ecosystem-level conservation; lands and waters of the System are biologically healthy; and refuge lands reflect national and international leadership in habitat management and wildlife conservation.

The NWRISA also declares that all existing and proposed public uses must be compatible with each refuge's purposes, and highlights six priority public uses that each Refuge should evaluate for compatibility. These are wildlife observation, photography, interpretation, environmental education, hunting and fishing. Recreational activities allowed on CNWR are also influenced by portions of Assateague Island being within the Assateague Island National Seashore (ASIS).

Recreational use and related development on Assateague Island were authorized under Public Law 85 57, Chincoteague National Wildlife Refuge, Virginia – Bridge and Road, approved on June 17, 1957, that provided for construction of a bridge and road to the Refuge beach as well as recreational facilities "to permit the controlled development of a portion of the seashore of the Chincoteague National Wildlife Refuge, Virginia for recreational purposes." These "easements and other rights" are subject to "such terms and conditions as the Secretary deems appropriate for the adequate protection of the wildlife refuge and other interests of United States."

The 1962 Refuge Recreation Act (16U.S.C. 460K – 460K – 4) expanded the purpose of all refuges to include "... (1) incidental fish and wildlife-oriented recreation development, (2) the protection of natural resources, (3) the conservation of endangered species and threatened species..."

On September 21, 1965, the Assateague Island Seashore Act authorized establishment of ASIS. The ASIS encompasses the Maryland side of Assateague Island and certain beach portions of the Virginia side of Assateague Island. The Act provided that the National Park Service (NPS) manage the Virginia portion for general purposes of public outdoor recreation with the qualification that land and water within the Refuge be administered for purposes under laws and regulations applicable to national wildlife refuges, including administration for public recreation use in accordance with the provisions of the Refuge Recreation Act (P.L. 87-714 (USFWS 1993).

Wallops Island National Wildlife Refuge (WINWR) was created on July 10, 1975 with the transfer of 373 acres of land to the Service from the National Aeronautics and Space Administration (NASA/Goddard Space Flight Center/Wallops Flight Facility). Wallops Island NWR is located entirely in Accomack County, Virginia. The primary purpose for this land transfer was for wildlife conservation and the "... particular value in carrying out the national migratory bird management program." (16 U.S.C. 667b-667d).

The Chincoteague NWR is open to the public for recreational uses centered on wildlife and wildland activities. Access to the Refuge is primarily through the town of Chincoteague, which has become a town

whose economy is increasingly dependent on the tourism dollars brought into their community by Refuge visitors.

The purpose of this analysis is to provide a better understanding of the economic relationship between the Refuge and the community. For CCP planning, a regional economic assessment provides a means of estimating how current management (no action alternative) and proposed management activities (alternatives) could affect the local economy. This type of analysis provides two critical pieces of information. First it illustrates a refuge's contribution to the local community. Second, it can help in determining whether local economic effects are or are not a real concern in choosing among management alternatives.

This report is organized as follows: (1) a general summary of demographic characteristics of Accomack County and the Town of Chincoteague (Chincoteague); (2) a discussion of the economic characteristics of Accomack County and Chincoteague, with the focus on Chincoteague; (3) a discussion of Chincoteague National Wildlife Refuge visitation and the associated economic impacts; (4) estimates of how the economies of Chincoteague and Accomack County are impacted by Refuge visitors; and (5) an estimate the economic impacts to the local and regional area of Refuge budget expenditures.

1.1 Refuge Profile

The Chincoteague National Wildlife Refuge is located primarily in Accomack County, Virginia with approximately 418 acres in Worcester County, Maryland. Most of the 14,032-acre Refuge is located on the southern end of Assateague Island (9,021 acres), a 37-mile long, mid-Atlantic, coastal, barrier island on the east side of the Delmarva Peninsula. In addition, the Refuge operates three divisions that are located on islands which, including Assateague Island, extend over 30 miles along the Atlantic Coast. Assawoman Island Division contains 1,434 acres and encompasses the entire island; Metompkin Island Division consists of 174 acres on the north end of the island; and Cedar Island Division contains 1,412 acres in fee title and 600 acres in easements¹. Additional lands can be found on the north end of Chincoteague Island, Wildcat Marsh (546 acres) and on Morris Island (427 acres), which is located between Chincoteague and Assateague Islands.

A bridge spanning Assateague Channel separates Refuge headquarters from the Town of Chincoteague. Chincoteague, the largest community in Accomack County (population 40,000), had approximately 4,300 permanent residents in 2009 (Chincoteague, Town of 2010). Numerous small rural communities and towns surround the Refuge. The Refuge headquarters and visitor center are located about a mile from the Chincoteague town center.

The Refuge has a single entry point for vehicle traffic, which is accessed via the Town of Chincoteague. Visitors come to the Refuge to participate in a variety of activities including wildlife watching, surf fishing, and general beach recreation. The Refuge is well known for its wild pony population, popularized by the bestselling children's book, Misty of Chincoteague by Marguerite Henry first published in 1947. This book popularized the annual roundup of the Assateague Island ponies that are located on the Refuge. These animals are herded to the Assateague Channel where they then swim across to Chincoteague Island to be auctioned off to benefit the Chincoteague Volunteer Fire Company. The event attracts thousands of tourists every year to witness the pony swim.

The first European explorer to record landing in the Assateague Island vicinity was Giovanni da Verrazano, sailing for the King of France in 1524 (Bearss, 1968). During the next one-hundred years, many explorers investigated the area but colonists preferred the better soils and protected environments to the mainland. In the mid-1600's Chincoteague and Assateague Islands were used to graze livestock by landowners wanting to avoid fencing ordinances on the mainland. Camps for livestock herders were established (Bearss, 1968 and Wroten, 1972); salt extraction and shell-fishing brought more seasonal inhabitants. These activities remain currently popular on the Refuge.

2.0. Socio-Demographics of Accomack County and Chincoteague

Population

According to the Town of Chincoteague's Comprehensive Plan, the population of Chincoteague grew 21 percent from 3,572 to 4,317 individuals between 1990 and 2000. While 2010 Census data is not yet available for the Town, Census estimates in their 2005-2009 American Community Survey that the total population has experienced no significant change.² Census estimates that nearly 52 percent of the population is female, which is slightly higher than the national average.

Accomack County's population is approximately one-half of a percent of the State of Virginia's total population and has remained so throughout the previous decade. The Town's population is slightly greater than ten percent of the County total.

² Census estimates that the total population was 4,303 with a margin of error of +/- 32. <http://factfinder.census.gov/>. Accessed 4/7/11.

Table 1

Accomack County and Virginia Population: 2000 - 2009

Year	Accomack County	Virginia	Percent of State
2000	38,365	7,882,590	0.49%
2001	38,473	7,191,304	0.53%
2002	38,593	7,283,541	0.53%
2003	38,566	7,373,694	0.52%
2004	38,669	7,468,914	0.52%
2005	38,716	7,563,887	0.51%
2006	38,580	7,646,996	0.50%
2007	38,455	7,719,749	0.50%
2008	38,395	7,795,424	0.49%
2009	38,462	7,882,590	0.49%

Source: U. S. Census Bureau 2011a

The surrounding population of the Chincoteague Refuge area is composed of predominately more minority races than either the State or the Nation. Specifically, the African American population of Accomack and Northampton Counties is 29 percent and 37 percent of the total population, respectively.

The median ages for Accomack and Northampton Counties is older than the median age for the State and Nation. While the percentage of family households with children is roughly the same as the State and Nation, the median family income for the counties is much lower. The poverty rate for family households with children is also much higher than either the State or Nation.

In contrast, the Town of Chincoteague is not as diversified as either county. Census estimates that over 99 percent of the Town's population is White. The Town's population is also estimated to be older than either the counties or the State. Census estimates that the Town's median age is slightly over 51 years – about ten years older than the median age for Accomack County and eight years for Northampton. Median family income, however, is estimated to be greater than either of the Counties. The Town's estimated median family income of \$57,500 is about \$10,000 greater than Northampton and \$9,000 greater than Accomack. However, the Town also has a very large percentage of families with children less than 18 years of age living beneath the poverty level. Census estimates that nearly 22 percent of the

Table 2

Demographic Characteristics of the Town of Chincoteague and Accomack County				
	Chincoteague	Accomack County	Virginia	United States
Total Population:	4,303	38,522	7,721,730	301,461,533
White	99.6%	66.7%	70.7%	74.5%
Black or African American	0	28.8%	19.6%	12.4%
Asian	0	0.3%	4.8%	4.4%
Multi-Race or Other	0	4.3%	4.9%	8.8%
Median age				
Total:	51.2	41.5	36.7	36.5
Male	n/a	38.3	35.3	35.2
Female	n/a	43.7	38.1	37.9
Total Households:	2,069	14,757	2,936,634	112,611,029
Family households:	1,350	9,767	1,967,020	75,082,471
Family households with children under 18	366	66.2%	67.0%	66.7%
Median family income in the past 12 months (in 2009 inflation-adjusted dollars)	\$ 57,500	\$ 48,698	\$ 72,193	\$ 62,363
Percent of Total Family Households with children under 18 below poverty level	21.9%	10.7%	7.2%	9.9%

Source: U.S. Census Bureau 2011

Town's families with children under 18 years of age are living beneath the poverty level compared to 11 percent for Accomack County.

Education

While the proportion of residents in Refuge counties having a high school degree is greater than that for the State or Nation, there are also a greater percentage of residents in these two counties not having completed high school than the State or Nation. The area also has a smaller percentage of residents with a Bachelors degree, Masters degree, Doctorate, and professional degrees than the State or Nation.

Table 3

Educational Attainment for Population over 25 years old				
	Chincoteague	Accomack	Virginia	United States
Combined Degrees	3,371	26,744	5,092,358	197,440,772
None	16.0%	23.7%	14.2%	15.4%
High School	35.7%	37.3%	13.6%	15.2%
Some College, no degree	15.3%	16.6%	19.4%	20.3%
Associates	5.3%	4.7%	6.6%	7.4%
Bachelors	12.9%	10.3%	19.8%	17.4%
Graduate or Professional	14.7%	7.5%	13.6%	10.1%

Source: U.S. Census Bureau 2011

Employment

Accommodation and food services, retail trade and health care are the leading employment sectors for Chincoteague while manufacturing, public administration and retail trade are the major sectors for Accomack County. Over 50 percent of the Town's workforce was employed in the Arts, entertainment and recreation, and accommodation and food services industry. It is not surprising that this industrial sector employs so many in the Town given the fact that the Town is the gateway community to the Refuge and its associated recreational activities. **Table 4** below shows the workforce totals by industry for both Accomack County and the Town of Chincoteague.

Table 4

Chincoteague and Accomack County 2010 Employment				
Sector	Chincoteague		Accomack County	
	Jobs	% of Total	Jobs	% of Total
Agriculture, Forestry, Fishing and Hunting	43	4.1%	218	1.8%
Mining, quarrying, and oil and Gas Production	0	0.0%	0	0.0%
Utilities	0	0.0%	84	0.7%
Construction	34	3.2%	480	3.9%
Manufacturing	1	0.1%	3,188	26.1%
Wholesale Trade	8	0.8%	249	2.0%
Retail trade	187	17.8%	1,247	10.2%
Transportation and warehousing	18	1.7%	121	1.0%
Information	17	1.6%	77	0.6%
Finance and Insurance	17	1.6%	178	1.5%
Real Estate, Rentals, leasing	31	2.9%	128	1.0%
Professional, scientific and technical services	8	0.8%	677	5.6%
Management of companies and enterprises	0	0.0%	103	0.8%
Administration and support, waste management and remediation	6	0.6%	307	2.5%
Educational Services	2	0.2%	na	
Health care and social Assistance	95	9.0%	1,103	9.0%
Arts, Entertainment and recreation	30	2.9%	na	
Accommodation and food services	505	48.0%	909	7.5%
Other services	25	2.4%	328	2.7%
Public administration	24	2.3%	2,762	22.6%
Total	1,051	100.0%	12,195	100.0%

Housing

Over 21 percent of the total housing units in Accomack County are located in the Town of Chincoteague despite the fact that only about 12 percent of the County's population lives in the Town. Much of the housing in Chincoteague has been constructed or converted into housing for seasonal rentals. Census estimates that there are over 2,000 seasonal vacancies in the Town, which account for over one-half of the entire seasonal vacancies in Accomack County. The median value of homes is also much higher in the Town than the County. Census estimates that the median value for the Towns houses are \$221,900 compared to \$145,600 for the County. The Town is clearly a community whose economy is highly dependent on the tourism industry

Table 5

Chincoteague and Accomack County Housing Characteristics			
	Accomack County	Town of Chincoteague	Percent
Total Housing Units	21,231	4,480	21.1%
Median value (dollars)	145,600	\$221,900	152.4%
Occupied Units	14,757	2,069	
Owner-Occupied	11,192	1,668	14.9%
Renter-Occupied	3,565	401	11.2%
Vacant	6,474	2,411	37.2%
Seasonal Vacancies	3,721	2,030	54.6%

Source: 2005-2009 American Community Survey 5-Year Estimates Survey: American Community Survey; Accessed 3/14/2011.

3.0. Economic Characteristics of Chincoteague and Accomack County

The Town of Chincoteague has several sources of economic activity, including tourism, both Refuge-related and other outdoor-based recreation opportunities, commercial fishing and seafood manufacturing, and impacts from the nearby Wallops Island Flight Facility. This section will summarize some general economic characteristics for Chincoteague and discuss tourist-related characteristics of the economy, the commercial and seafood manufacturing sectors and the impacts of the Wallops Island Flight Facility.

3.1 Chincoteague

Table 6 shows Chincoteague employment by business sector for the years 2007 - 2009. The sectors with the largest number of employed are typically accommodation and food services, retail trade, and health care and social assistance, which typically account for up to 50 percent or more of total employment. Total employment in 2007 was 907, in 2008, 945 and in 2009, 943. **Table 7** shows a comparison of Chincoteague employment from 2007 to 2010. In 2010, the three largest sectors, accommodation and food services, retail trade and health care and social assistance, accounted for almost 75 percent of total wage and salary employment. This compares with 2007, where the three largest sectors, accommodation and food services, retail trade and public administration, also accounted for about 75 percent of employment. The largest gain in jobs came from the health care sector, which showed a net gain of 53 jobs. Other sectors which showed significant gains include the retail trade sector, which showed a gain of 49 jobs, the accommodation and food service sector which gained 43 jobs, the agriculture, forestry, fishing and hunting sector which gained 42 jobs and the arts, entertainment and recreation sector which increased by 29 jobs. The sector which lost the most jobs, public administration (local, state and federal government jobs) decreased by 52 jobs. Note that these figures are wage and salary employment and do not include the self-employed. Chincoteague has a substantial number of self-employed, as evidenced by the number of business licenses issued in 2011 compared with the number of businesses which employed at least one person during the year (Table 8). In 2011, 1,269 business licenses issues. **Table 8** shows 149 businesses which employed at least one person during 2010. Over 700 of the business licenses issued were for tourist rental homes, leaving 565 licenses covering the rest of the business sectors in town. Consequently, about 416 licenses are for the self-employed aside from the tourist rental home business.

For businesses that did employ people, the accommodation and food service sector accounted for 47 businesses, the retail trade sector accounted for 31 businesses, the construction sector for 15 and the real estate, rental and leasing sector for 11. These four sectors accounted for 70 percent of all businesses which hired workers in 2010.

Table 9 shows business sectors which are typically associated with tourism (and which employed people during the year). This does not imply that all the revenue generated by these sectors comes from tourism only that, under typical circumstances, most of tourist spending occurs in these categories. The sectors in **Table 9** are sub-sectors of the more general sector categories in **Table 8**. Hotels, motels, bed and breakfast inns, RV parks and campgrounds, and other accommodations account for 27 businesses, or 33 percent of the total. Food services also account for 27 businesses. For these 82 businesses, about 1/3 provide accommodations, 1/3 are food-related and 1/3 are other retail purchases.

Table 6. Chincoteague Town Employment by Business Sector: 2007 - 2009

Sector	2007		2008		2009	
	Jobs	% of Total	Jobs	% of Total	Jobs	% of Total
Agriculture, Forestry, Fishing and Hunting	1	0.1	18	1.9	8	0.8
Mining, quarrying, and oil and Gas Production	0	0.0	0	0.0	0	0.0
Utilities	0	0.0	0	0.0	6	0.6
Construction	40	4.4	43	4.6	27	2.9
Manufacturing	4	0.4	1	0.1	32	3.4
Wholesale Trade	9	1.0	10	1.1	21	2.2
Retail trade	138	15.2	152	16.1	116	12.3
Transportation and warehousing	10	1.1	10	1.1	21	2.2
Information	17	1.9	11	1.2	16	1.7
Finance and Insurance	19	2.1	12	1.3	34	3.6
Real Estate, Rentals, leasing	34	3.7	36	3.8	18	1.9
Professional, scientific and technical services	14	1.5	13	1.4	73	7.7
Management of companies and enterprises	0	0.0	1	0.1	21	2.2
Administration and support, waste management and remediation	19	2.1	18	1.9	59	6.3
Educational Services	3	0.3	1	0.1	45	4.8
Health care and social Assistance	42	4.6	106	11.2	162	17.2
Arts, Entertainment and recreation	1	0.1	3	0.3	32	3.4
Accommodation and food services	462	50.9	409	43.3	149	15.8
Other services	19	2.1	21	2.2	71	7.5
Public administration	76	8.4	80	8.5	32	3.4
Total	907	100.0	945	100.0	943	100.0

Source: Virginia Employment Commission 2011a

Table 7: Chincoteague Town Employment by Business Sector: 2010 - 2007 Comparison

Sector	2010		2007		Change
	Jobs	% of Total	Jobs	% of Total	
Agriculture, Forestry, Fishing and Hunting	43	4.1%	1	0.1	+42
Mining, quarrying, and oil and Gas Production	0	0.0%	0	0.0	0
Utilities	0	0.0%	0	0.0	0
Construction	34	3.2%	40	4.4	-6
Manufacturing	1	0.1%	4	0.4	-3
Wholesale Trade	8	0.8%	9	1.0	-1
Retail trade	187	17.8%	138	15.2	+49
Transportation and warehousing	18	1.7%	10	1.1	+8
Information	17	1.6%	17	1.9	0
Finance and Insurance	17	1.6%	19	2.1	-2
Real Estate, Rentals, leasing	31	2.9%	34	3.7	-3
Professional, scientific and technical services	8	0.8%	14	1.5	-6
Management of companies and enterprises	0	0.0%	0	0.0	0
Administration and support, waste management and remediation	6	0.6%	19	2.1	-13
Educational Services	2	0.2%	3	0.3	-1
Health care and social Assistance	95	9.0%	42	4.6	+53
Arts, Entertainment and recreation	30	2.9%	1	0.1	+29
Accommodation and food services	505	48.0%	462	50.9	+43
Other services	25	2.4%	19	2.1	+6
Public administration	24	2.3%	76	8.4	-52
Total	1,051	100.0%	908	100.0	+143

Source: Virginia Employment Commission 2011a

Table 8

Sector	Number of Businesses
Accommodation and Food services Total	47
Retail Trade Total	31
Construction Total	15
Real Estate, Rental and Leasing Total	11
Health care and social assistance Total	8
Other services Total	8
Arts, entertainment and recreation Total	6
Professional, scientific and Tech services Total	5
Wholesale trade Total	3
Transportation and warehousing Total	3
Information Total	3
Finance and Insurance Total	3
Administrative and support, and waste management and remediation services Total	3
Agriculture, Forestry, Fishing, Hunting Total	2
Educational Services Total	2
Manufacturing Total	1
Public administration Total	1
Total Businesses employing workers	149

Source: Virginia Employment Commission 2011a

Table 9

Tourism Related Businesses Employing Workers in Chincoteague 2010		
NAICS Code	Sector	Number
721110	Hotels (except Casino Hotels) and Motels	16
722110	Full-Service Restaurants	11
453220	Gift, Novelty, and Souvenir Stores	7
721191	Bed-and-Breakfast Inns	5
722211	Limited-Service Restaurants	5
721211	RV (Recreational Vehicle) Parks and Campgrounds	4
448190	Other Clothing Stores	3
713990	All Other Amusement and Recreation Industries	3
722213	Snack and Nonalcoholic Beverage Bars	3
445110	Supermarkets and Other Grocery (except Convenience) Stores	2
447110	Gasoline Stations with Convenience Stores	2
452990	All Other General Merchandise Stores	2
721199	All Other Traveler Accommodation	2
445120	Convenience Stores	1
445299	All Other Specialty Food Stores	1
445310	Beer, Wine, and Liquor Stores	1
446110	Pharmacies and Drug Stores	1
447190	Other Gasoline Stations	1
448120	Women's Clothing Stores	1
448140	Family Clothing Stores	1
451110	Sporting Goods Stores	1
487210	Scenic and Sightseeing Transportation, Water	1
488490	Other Support Activities for Road Transportation	1
491110	Postal Service	1
532292	Recreational Goods Rental	1
712190	Nature Parks and Other Similar Institutions	1
713930	Marinas	1
722212	Cafeterias, Grill Buffets, and Buffets	1
		82

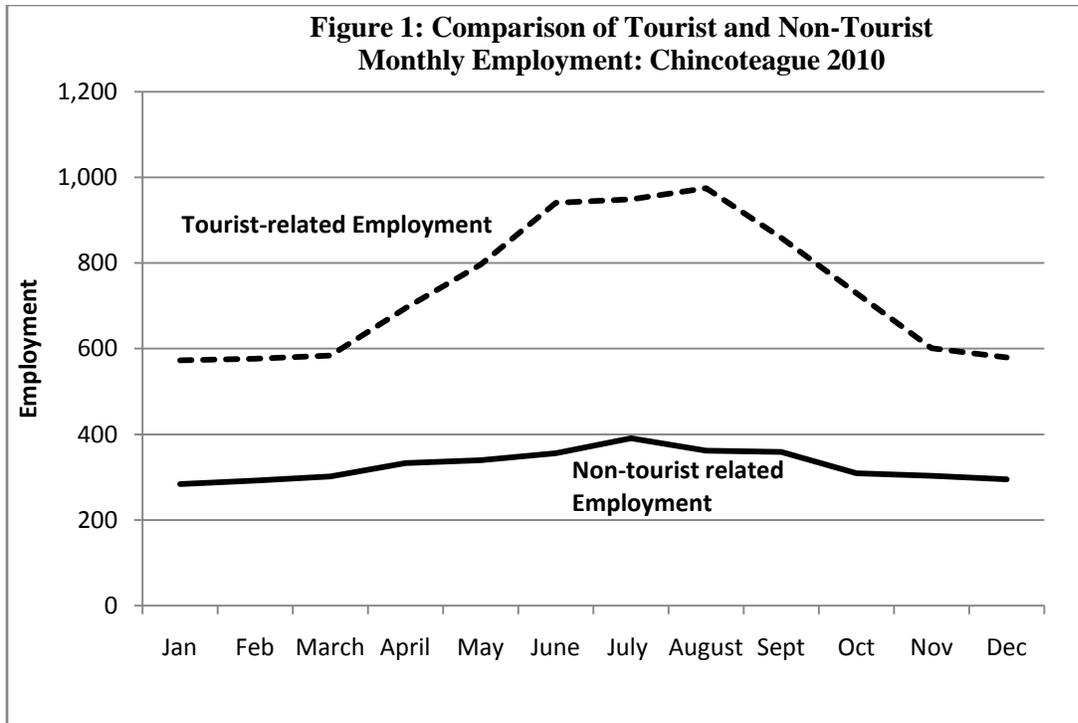
Source: Virginia Employment Commission 2011a

Chincoteague relies to a significant degree on tourism for town income. Tourism is not constant throughout the year, the summer months showing the highest concentration of visitors and the winter months the lowest. Consequently, much of the employment in Chincoteague follows a similar pattern. **Table 10** shows Chincoteague 2010 employment by month categorized by tourist and non-tourist related businesses. As shown in **Table 10**, total employment is lowest in January and highest in July, ranging from 857 to 1,340. Tourist-related employment ranges from 573 in January to 975 in August, an increase of 70 percent from January. In contrast, non-tourist related employment ranges from 284 in January to 391 in July, an increase of 38 percent. **Figure 1** shows a monthly graph of tourist and non-tourist employment in 2010.

Table 10**Chincoteague Town Tourist and Non-Tourist Employment by Month: 2010**

Month	Tourist-related Businesses	Non-Tourist related Businesses	Total
Jan	573	284	857
Feb	577	292	869
March	584	302	886
April	695	333	1,028
May	797	340	1,137
June	941	356	1,297
July	949	391	1,340
August	975	362	1,337
September	859	359	1,218
October	730	309	1,039
November	601	303	904
December	580	295	875
Annual range	573 - 975	284 - 391	857 - 1,340

Source: Virginia Employment Commission 2011a



Source: Virginia Employment Commission 2011a

As **Tables 11** and **12** show, lodging and food businesses comprise about two-thirds of the tourist-related business in Chincoteague. Tourism not only generates revenue for these sectors, but also generates revenue for the town in the form of food and lodging excise taxes. **Table 11** shows available lodging by type of accommodation in Chincoteague.

Table 11

Available Lodging in Chincoteague by Type: 2010		
Lodging Type	Number of Establishments	Number of rooms/spaces/sites
Hotels/motels	21	849
Bed and breakfast	6	33
Cottages	6	80
Campgrounds	4	1,143
Vacation Rental Homes	670	670
Total	707	2,775

Source: Chincoteague Chamber of Commerce 2011

Aside from vacation rental homes, hotels and motels account for the most number of establishments at 21, while campgrounds offer the most number of spaces at 1,143. Cottages and bed and breakfasts number 12 businesses and offer 113 rooms. Vacation rental homes numbered 670 in 2010 and 705 in 2011. In 2010, all establishments numbered 707 offering 2,775 rooms, spaces, or homes.

Table 12 shows gross receipts derived from the transient occupancy tax (lodging excise tax) from 2001 to 2010. Over the 10-year period, hotels and motels account for 60.5 % of average annual gross receipts, tourist homes 31.3%, campgrounds 4.7 % and bed and breakfasts 3.5%. Annual receipts averaged \$17.6 million over the 10 year period. **Table 13** shows the tax receipts derived from the lodging tax for both Chincoteague and Accomack County. Chincoteague tax receipts ranged from \$339,000 in 2005 to \$602,800 in 2010, an increase of 78 percent.

Table 12

Chincoteague Transient Occupancy Tax; Gross Receipts Reported: 2001 – 2010 (dollars in millions)										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Tourist Homes	\$4.6	\$4.9	\$5.2	\$5.4	\$5.2	\$5.4	\$5.9	\$5.9	\$6.3	\$6.3
Hotels /motels	\$8.8	\$9.4	\$10.2	\$10.4	\$10.6	\$11.8	\$11.7	\$12.7	\$12.0	\$9.1
Campgrounds	\$0.899	\$0.904	\$0.724	\$0.733	\$0.758	\$0.846	\$0.929	\$0.769	\$0.991	\$0.781
Bed and Breakfasts	\$0.702	\$0.648	\$0.584	\$0.583	\$0.635	\$0.694	\$0.705	\$0.587	\$0.594	\$0.378
Total	\$15.0	\$15.9	\$16.7	\$17.1	\$17.2	\$18.7	\$19.2	\$20.0	\$19.9	\$16.6

Source: Town of Chincoteague 2011b (Tables 12 and 13); Virginia Tourism Corporation 2011 (Table 13)

Table 13

Chincoteague Lodging tax receipts as percentage of Accomack County Lodging Tax Receipts (dollars in thousands)						
	2005	2006	2007	2008	2009	2010
Chincoteague excise tax collected	\$339.0	\$358.4	\$384.0	\$573.4	\$620.0	\$602.8
Accomack County Tax collected	\$670.4	\$724.5	\$791.3	\$991.9	\$1,047.5	\$1,017.7
Chincoteague portion of County Excise Tax	50.6%	49.5%	48.5%	57.8%	59.2%	59.2%

In addition to the lodging tax, Chincoteague also has a food excise tax, which applies to restaurants and other establishments which prepare food for consumption (as opposed to grocery stores). **Table 14** shows both food and lodging excise tax revenue for the years 2004 to 2010. The food service excise tax revenue has been fairly constant, ranging from \$433,100 in 2004 to \$487,100 in 2010, a 12.5 % increase. Total excise tax collections ranged from \$761,500 in 2004 to \$1,089,900 in 2010, a 43.1 % increase.

Table 14

Town of Chincoteague: Lodging and Food Excise Tax Collected: 2004-2010							
(dollars in thousands)							
	2004	2005	2006	2007	2008	2009	2010
Lodging Excise tax Collected	\$328.4	\$339.0	\$358.4	\$384.0	\$573.4	\$620.0	\$602.8
Food Service Excise tax Collected	\$433.1	\$434.3	\$435.0	\$451.0	\$452.2	\$480.7	\$487.1
Total Excise Tax collected	\$761.5	\$773.3	\$793.4	\$835.0	\$1,025.6	\$1,100.7	\$1,089.9

Source: Virginia Tourism Corporation 2011

3.2 Chincoteague commercial and recreational fishing and seafood processing

Aside from tourism, one of the important contributors to Chincoteague’s economy is the commercial fishing and seafood processing industries. **Table 15** shows the dollar value of commercial fish landings in Chincoteague for the period 1997 through 2006 (more recent information is not currently available). The total average from 1997 to 2006 is \$4.9 million; 2006 only is \$11.6 million. Aside from landings, a number of commercial fishing vessels use Chincoteague as their homeport or frequently dock at the harbor. **Table 16** shows the number of vessels which use the Chincoteague harbor and associated landings. Home ported vessels are vessels which use Chincoteague as their home port, while owners city vessels refer to vessels listed under the owners home city (not necessarily Chincoteague) which use the facilities at Chincoteague.

Recreational fishing is a popular activity in Chincoteague. In 2011 there were 28 charter boats operating out of Chincoteague. There are a several public boat ramps in Chincoteague which see extensive use, along with the Town Dock bulkhead and the pier at Memorial Park. There are also a number of fishing tournaments held in Chincoteague which draw a significant number of anglers.

Shellfish harvesting and processing also contribute to the Chincoteague economy. While the industry is not as robust as it has been in the past, it still provides a significant number of jobs and income to the community. (Note: this section is based on **Community Profile of Chincoteague Virginia. Prepared under the auspices of the National Marine Fisheries Service**).

Table 15

Dollar Value of Federally Managed Groups of Landing in Chincoteague		
Group	Average from 1997-2006	2006 only
Scallop	\$2,730,647	\$7,752,896
Summer Flounder, Scup, Black Sea Bass	\$1,126,760	\$2,159,346
Other	\$506,696	\$921,375
Monkfish	\$401,496	\$540,864
Lobster	\$61,952	\$143,776
Dogfish	\$51,843	\$38,035
Squid, Mackerel, Butterfish	\$38,565	\$12,133
Blue Fish	\$12,833	\$54,857
Skate	\$6,221	\$1,710
Tilefish	\$1,522	\$14
Smallmesh groundfish	\$379	\$0
Largemesh Groundfish	\$293	\$0

Source: National Marine Fisheries Service 2007 (Tables 15 and 16)

Table 16

Vessels and Landings by Year				
Year	Vessels (Home ported)	Vessels (owners city)	Level of Fishing Homeport	Level of fishing landed port
1997	13	10	\$6,601	\$906,166
1998	15	15	\$24,382	\$763,754
1999	17	15	\$48,132	\$2,128,891
2000	21	16	\$362,409	\$2,431,371
2001	24	17	\$354,429	\$2,569,596
2002	28	18	\$321,982	\$2,877,693
2003	26	18	\$503,801	\$4,078,803
2004	22	17	\$299,244	\$7,248,586
2005	25	17	\$311,281	\$14,752,188
2006	22	16	\$333,110	\$11,625,008

3.3. NASA Wallops Flight Facility and Mid-Atlantic Regional Spaceport

The NASA Wallops Flight Facility, just a few miles northwest of Chincoteague, is a source of economic activity for the town. This facility, which also includes the Mid-Atlantic Regional Spaceport administered by the Virginia Commercial Space Flight Authority, generates economic activity in several ways: (1) the annual impacts from operations of the various businesses at the site; (2) the employment impact generated by the percentage of the employees' payroll spent locally; and (3) the annual impact from the additional tourism generated in Accomack County (and Chincoteague) by the Flight Facility (Bunch 2011, p.4). **Table 17** shows that Accomack County accounted for \$77.8 million in economic impacts, the rest of the Lower Eastern Shore in Virginia \$110.5 million, for a total of \$188.3 million. Accomack County accounted for 1,206 jobs, Lower Eastern Shore 1,141 for a total of 2,341 jobs. The portion of these impacts which occur in Chincoteague is not known, but it is reasonable to assume that Chincoteague derives significant economic activity from the Flight Facility.

Table 17

Estimated Annual Economic, Employment and Fiscal Impacts of Activities at Wallops Island (dollars in millions)					
	Accomack County	Lower Eastern Shore	Total	Outside of Region	Total Impacts
Total Economic Impacts	\$77.8	\$110.5	\$188.3	\$207.2	\$395.5
Employment Impacts	1,206	1,141	2,341	704	1,646
State and Local Tax Revenue	\$2.7	\$4.5	\$7.1	\$6.3	\$13.4
Federal Tax Revenue	\$2.3	\$3.5	\$5.8	\$7.5	\$13.3

Source: Bunch 2011, p.2

3.4. Accomack County

Table 18 shows taxable sales by business sector for Accomack County in 2010. Taxable sales totaled \$286.4 million with retail trade accounting for \$179.5 million, 62.7 percent of the total, and accommodation and food services accounting for \$47.1 million, 16.5 % of total taxable sales.

Table 19 shows estimates of travel-related expenditure impacts in Accomack County. These are expenditures by travelers going to or through Accomack County. In 2010, travel-related expenditures totaled \$145.1 million, a 14.3 percent increase from 2006. These expenditures resulted in \$31.4 million in payroll and 1,847 jobs. State tax receipts totaled \$6.9 million and local tax receipts totaled \$4.5 million.

Table 18**Accomack County Taxable Sales by Business Sector: 2010**

Business Sector	Taxable Sales	Percent of Total
No Sector Name Information	\$5,089,123	1.8%
Construction	\$2,399,516	0.8%
Manufacturing	\$1,975,603	0.7%
Wholesale Trade	\$16,204,731	5.7%
Retail Trade	\$179,502,391	62.7%
Real Estate Rental and Leasing	\$10,551,698	3.7%
Professional, Scientific and Technical Services	\$2,723,241	1.0%
Administrative and Support Services	\$309,500	0.1%
Arts, Entertainment and Recreation	\$1,674,294	0.6%
Accommodation and Food Services	\$47,125,069	16.5%
Other Services	\$5,568,627	1.9%
Sub-Total	\$273,123,793	95.3%
Misc. and unidentifiable	\$13,340,460	4.7%
Total	\$286,454,253.35	100.0%

Source: Virginia Department of Taxation 2011.

Table 19

Accomack County Travel Related Economic Impacts: 2006 - 2010
(Dollars in millions)

Impacts	2006	2007	2008	2009	2010	Percent Change 2006 - 2010
Expenditures	\$127.0	\$134.3	\$140.4	\$137.5	\$145.1	+14.3%
Payroll	\$28.5	\$28.8	\$30.0	\$30.6	\$31.4	+10.2%
Employment	1,780	1,795	1,827	1,852	1,847	+3.8%
State tax receipts	\$6.1	\$6.4	\$6.5	\$6.8	\$6.9	+13.1%
Local tax Receipts	\$4.0	\$4.2	\$4.4	\$4.4	\$4.5	+12.5%

Source: Virginia Tourism Corporation 2011

4.0. Chincoteague National Wildlife Refuge Recreation Visits and Associated Economic Impacts

In 1997, President William Jefferson Clinton signed into law the Refuge Improvement Act which establishes a unifying mission for the Refuge System. The mission of the Refuge System is:

“To administer a national network of lands and waters for the conservation, management, and where appropriate, restoration of the fish, wildlife, and plant resources and their habitats within the United States for the benefit of present and future generations of Americans.” — Refuge Improvement Act; Public Law 105-57

The Refuge Improvement Act also establishes a new process for determining compatibility of public uses on refuges, and requires the Service to prepare a CCP for each refuge. The Act states that the Refuge System must focus on wildlife conservation. It also requires that the mission of the Refuge System, coupled with the purposes for which each refuge was established, will provide the principal management direction on that refuge. The Refuge Improvement Act identifies six wildlife-dependent public uses—hunting, fishing, wildlife observation and photography, and environmental education and interpretation—that will receive priority consideration on refuges and, therefore, in CCPs. Furthermore, the Act declares that all existing or proposed public or commercial uses must be “compatible” with the refuge’s purpose and consistent with public safety. The refuge manager determines if an existing or proposed use is “compatible” by evaluating its potential impact on refuge resources, insuring that the use supports the System mission, and does not materially interfere with or detract from the purpose for which the refuge was established.

Chincoteague National Wildlife Refuge is one of the most heavily visited refuges in the national system. Visitors come to Chincoteague for a variety of reasons. Many come in the summer months to access the beach. The beaches of Assateague Island offer a unique experience in the mid-Atlantic area as they exist primarily in an undeveloped setting unlike other beaches like Virginia Beach or Ocean City Maryland that are heavily developed. This natural setting draws many families seeking out a more traditional beach going experience.

Many summer beach visitors also take time to enjoy the wildlife found on the Refuge as they pass through on their way to or from the beach. While the Refuge is famous for its native ponies, which families delight in watching, visitors will also see many different types of migratory birds and waterfowl, and animals thus exposing them to other types of wildlife that they may not normally see on a more traditional beach visit and hopefully leaving the visitor with a greater appreciation of the importance of conservation and the ability to participate and enjoy low-impact activities for the benefit of wildlife and their habitats.

During the Fall and Spring Seasons the many visitors come to the beach for surf fishing opportunities. In the fall, the Refuge opens up lower part of the beach from the parking lot to Toms Cove Hook to off-road vehicles. While some of these users are primarily engaged in wildlife watching, traditionally, most users are engaged in surf fishing activities.

The fall is also prime time for waterfowl hunting. Chincoteague NWR allows for the hunting of waterfowl during the State season. Hunters must obtain a Migratory Game Bird Hunting permit from the

Refuge for five dollars in order to hunt on the Refuge. Hunters must also possess valid State permits as well as a federal Migratory Duck Stamp in order to hunt waterfowl. During the hunting season, hunters may target ducks, geese, swans, coots, and rails. The Refuge allows hunting during the days of Thursday, Fridays, and Saturdays. The Refuge allows hunting only within the designated areas of Wildcat Marsh, Morris Island, Assawoman Island, and Metompkin Islands. The harvesting of waterfowl on the Refuge is conducted in an environmentally friendly and sustainable manner, helping to ensure that the resources will be available to future generations for enjoyment.

There is also limited big game hunting on the Refuge for Sika and White-tailed deer. Hunting occurs during the months of December and January. Hunting on the Refuge is controlled through a lottery process. Once selected by the lottery system, hunters must attend a firearms orientation session prior to hunting on the Refuge. The Refuge is divided into eleven primary hunting zones, with a few of those zones that are located closer to developed portions of the Refuge subdivided for smaller force firearms for safety considerations to the public.

4.1. Chincoteague NWR Visitor Use

Table 20 shows Chincoteague NWR visitor use for 2010. A “visitor” is one person visiting the Refuge for all or part of one day. “Visits” are the number of activities a visitor engages in; for example, a person who goes bird watching and engages in nature photography is counted as two visits. Most of the activities on the Refuge are wildlife observation, hiking, nature walks, photography and beach use. **Table 21** shows the number of Refuge visitors for the months June through August from 2005 to 2010. Well over half of total annual visitation occurs during these three months, ranging from 55 percent in 2010 to 58 percent in 2005.

Beach use is an important component of Chincoteague NWR visitor use. **Table 22** shows one measure of visitor use (traffic counts) measured at the National Park Service visitor center near the beach. While most of the beach use occurs from June through August, a considerable amount of use occurs before and after this period, ranging from about 40 to 45 percent of total annual use. **Figure 2** shows a graph of the traffic count for the months June through August for the years 1997 to 2011; **Figure 3** shows a graph of the total annual traffic count for the same years (National Park Service 2011).

Several times during the summer, the beach parking lot is filled to capacity and closes (Chincoteague NWR 2011a).

Parking lot closures:	2007- 8
	2008 - 4
	2009 - 13
	2010 - 5

Table 20

Chincoteague NWR 2010 Visitation	
Total number of visitors	1,359,553
Number of Special Events hosted on- and off-site	7
Number of participants in special events on site	8,568
Visitors to Visitor Center or Contact Station	364,568
Upland game hunt visits	0
Big game hunt visits	2,097
Total hunting visits	2,304
Fishing visits	129,885
Number of Foot Trail/Pedestrian visits	1,019,664
Number of Auto Tour visits	1,359,553
Number of Boat Trail/Launch visits	0
Number of Bicycle visits	352,740
Total Wildlife Observation visits	2,731,957
Number of Photography participants	815,731
Number of education participants involved in on- and off-site environmental education programs.	8,948
Number of interpretation participants in on- and off-site talks/programs	60,226
Total other recreational participants	2,719,106

Source: Chincoteague NWR 2011

Table 21

**Chincoteague National Wildlife Refuge: June - August and Annual Visitors:
2005 - 2010**

Month	2005	2006	2007	2008	2009	2010
June	181,724	162,293	172,760	145,904	162,572	160,581
July	375,862	307,132	297,697	291,281	314,110	304,248
August	289,398	311,846	317,484	311,367	328,783	282,916
3 month total	846,984	781,271	787,941	748,552	805,465	747,745
Annual Total	1,454,371	1,401,862	1,386,842	1,296,285	1,400,254	1,359,553
June - August total as % of annual total	58.2 %	55.7 %	56.8 %	57.7 %	57.5 %	55.0 %

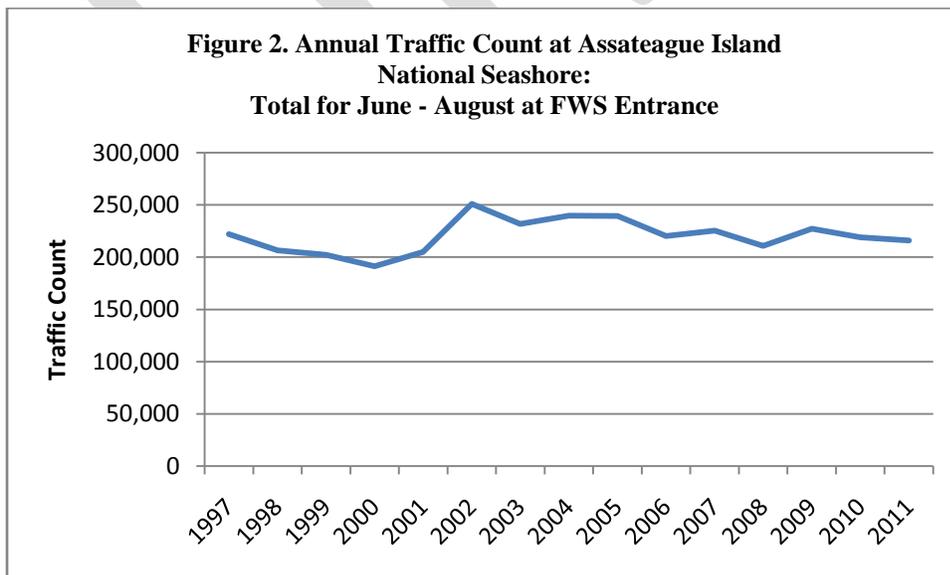
Source: Chincoteague NWR 2011b

Table 22

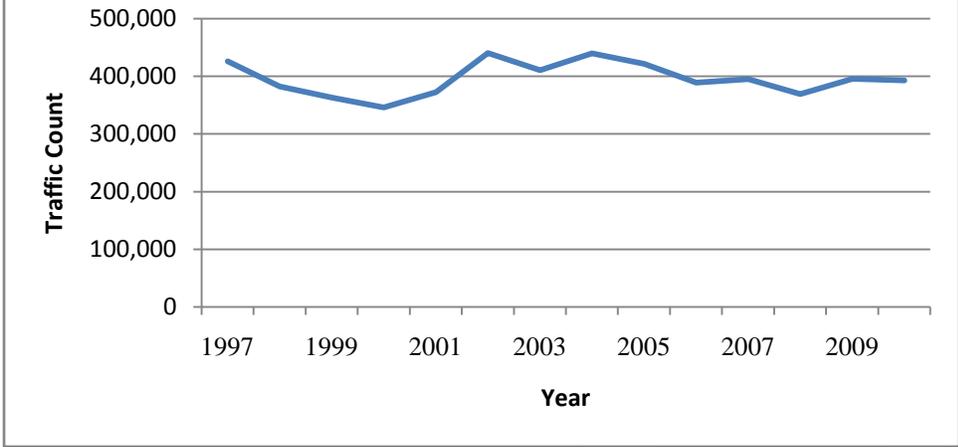
**Assateague Island National Seashore: Traffic Counts At Chincoteague NWR
July - August and Annual Counts**

Year	JUN	JUL	AUG	Total	Annual
1997	56,005	76,957	89,035	221,997	426,162
1998	45,160	81,378	80,021	206,559	382,650
1999	42,140	78,541	81,349	202,030	363,118
2000	44,041	77,717	69,399	191,157	346,181
2001	47,166	82,783	74,797	204,746	372,385
2002	63,893	94,053	93,011	250,957	440,341
2003	49,836	86,568	95,346	231,750	410,768
2004	48,391	108,164	83,179	239,734	439,679
2005	51,765	106,164	81,358	239,287	421,819
2006	45,999	86,357	87,827	220,183	389,107
2007	49,105	86,638	89,452	225,195	395,067
2008	41,136	81,789	87,689	210,614	369,548
2009	46,082	88,368	92,708	227,158	395,648
2010	45,821	91,884	81,155	218,860	392,804
2011	51,765	91,987	72,038	215,790	na

Source: National Park Service 2011



**Figure 3. Annual Traffic Count At Assateague Island
National Seashore:
Total Annual Count at FWS Entrance**



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4.2. Economic Impact of Refuge Visitation

Spending associated with recreational use of the Refuge can generate a substantial amount of economic activity in both local and regional economies. Refuge visitors spend money on a wide variety of goods and services. Trip-related expenditures may include expenses for food, lodging and transportation. Anglers, hunters, boaters and wildlife watchers also buy equipment and supplies for their particular activity. Because this spending directly affects towns and communities where these purchases are made, recreational visitation can have a significant impact on local economies, especially in small towns and rural areas. These direct expenditures are only part of the total picture, however. Businesses and industries that supply the local retailers where the purchases are made also benefit from recreation spending. For example, a family may decide to purchase a set of fishing rods for an upcoming vacation. Part of the total purchase price will go to the local retailer, say a sporting goods store. The sporting goods store in turn pays a wholesaler who in turn pays the manufacturer of the rods. The manufacturer then spends a portion of this income to cover manufacturing expenses. In this fashion, each dollar of local retail expenditures can affect a variety of businesses at the local, regional and national level. Consequently, consumer spending associated with Refuge recreation can have a significant impact on economic activity, employment, household earnings and local, state and Federal tax revenue.

Ideally, information would be available on Refuge-specific expenditures, how much visitors spend and what they spend it on, and where they spend it. This information is not currently available, consequently in order to derive quantitative estimates of Refuge recreation impacts on Chincoteague and Accomack County, a number of assumptions will have to be made. While any estimates based on these assumptions will lack the precision of estimates based on site-specific information, these estimates may work as reasonable, reconnaissance-level estimates.

4.2.1. Major assumptions

Several assumptions are used to enable estimates of the economic impact of Refuge visitation.

1. The estimate of Refuge visitors is essentially “visitor days”, in the sense that a visitor is one person on the Refuge for at least part of one day. A visitor who spends two days visiting the Refuge counts as two visitors.
2. Refuge-specific spending information is not available. Regional spending averages are available from the National Survey of Fishing, Hunting and Wildlife-Associated Recreation (U.S. Department of the Interior 2007). **Table 23** shows average per day per person expenditures based on survey information for Fish and Wildlife Service Region 5 Northeast Region (including Virginia). In the present context, local non-consumptive expenditures are expenditures by local residents for day trips to the Refuge; non-local non-consumptive expenditures are for visitors from out of the local area which include both day trips and overnight visits averaged together. It is assumed that these expenditures are reasonably reflective of actual expenditures for Refuge visitors.

Table 23

Average Per Person Per Day Expenditures: FWS Northeast Region		
Sector	Local Non-consumptive Expenditures	Non-local Non-consumptive Expenditures
Lodging	\$3.19	\$26.18
Food/Drink	\$6.76	\$39.40
Transportation	\$7.54	\$24.06
Other Retail	\$1.58	\$1.98
Total	\$19.07	\$91.62

Source: U.S. Department of the Interior 2007.

3. Information is not currently available as to where Refuge visitors make their purchases. While it is reasonable to assume that Chincoteague receives a significant portion of these expenditures, it is not known precisely what portion is spent in Chincoteague. For example, a visitor from Norfolk Virginia south of the Refuge may spend some money in Norfolk, some in North Hampton County and some in Accomack County, including Chincoteague. All of these purchases are related to a Refuge visit, but the expenditures occur in up to four different areas.

To address this issue, information from previous area studies will be used to help determine the proportion of Refuge spending occurring in Chincoteague and Accomack County. A study on the economic impact of Wallops Island Flight facility (Bunch 2011) estimates where visitors spend their money when visiting the facility. The report estimates that 45 percent of expenditures are in Accomack County, 45 percent in Worcester County to the north and 10 percent out of the area. In lieu of any other currently available information, it is assumed that these percentages are reasonably representative of where Refuge visitors spend their money. An alternative approach is to assume that 100 percent of Refuge expenditures occur in Accomack and Worcester Counties.

4. The economic model used to estimate economic impacts can only derive estimates at the county level or above. The model can estimate impacts for the combined counties of Accomack and Worcester, but information is not currently available to derive Chincoteague economic impacts using the model. Consequently, an alternative approach is used to derive Chincoteague impacts (discussed below).

5. The use of 80 percent as the percentage of Chincoteague's tourist economy attributable to Refuge visitation may be too high; reliance on a range of percentages based on expert opinion may be more reasonable.

4.2.2. Economic Impacts Measures

The economic impact estimates of the Accomack -Worcester model is shown first. Economic impacts include expenditures (retail sales), economic output, jobs and job income and tax revenue. These are discussed below.

Retail expenditures shows the total annual retail expenditures associated with recreational visits to the Refuge. Currently, it is not known where (geographically) exactly Refuge visitors spend money. This approach assumes that 100 percent of expenditures occur in the Accomack - Worcester County area.

Economic output (also known as *industrial output*) shows the total output generated by total recreation-related expenditures. Total output is the production value (alternatively, the value of all sales plus or minus inventory) of all output generated by recreation expenditures. Total output includes the direct, indirect and induced effects of these expenditures. Direct effects are simply the initial effects or impacts of spending money; for example, spending money in a grocery store for a fishing trip or purchasing ammunition or a pair of binoculars are examples of direct effects. The purchase of the ammunition by a sporting goods retailer from the manufacturer or the purchase of canned goods by a grocery store from a food wholesaler would be examples of indirect effects. Finally, induced effects refer to the changes in production associated with changes in household income (and spending) caused by changes in employment related to both direct and indirect effects. More simply, people who are employed by the grocery store, by the food wholesaler, and by the ammunition manufacturer spend their income on various goods and services which in turn generate a given level of output. The dollar value of this output is the induced effect of the initial (or direct) recreation expenditures³. The economic impact of a given level of expenditures depends, in part, on the degree of self-sufficiency of the area under consideration. For example, a county with a high degree of self-sufficiency (out-of-county imports are comparatively small) will generally have a higher level of impacts associated with a given level of expenditures than a county with significantly higher imports (a comparatively lower level of self-sufficiency). Consequently, the economic impacts of a given level of expenditures will generally be less for rural and other less economically integrated areas compared with other, more economically diverse areas or regions.

Jobs and job income include direct, indirect and induced effects in a manner similar to total industrial output. Employment includes both full and part-time jobs, with a job defined as one person working for at least part of the calendar year, whether one day or the entire year. Job income in the IMPLAN system consists of both employee compensation and proprietor income (MIG, Inc. 2008).

Tax revenues are shown for business taxes, income taxes, and a variety of taxes at the county, state and national level. Like output, employment and income, tax impacts include direct, indirect and induced tax effects of expenditures, output and job income.

Two types of information are needed to estimate the economic impacts of recreational visits to the refuge: (1) the amount of recreational use on the Refuge; and (2) expenditures associated with recreational visits to the Refuge. With this information, total recreation-related expenditures can be estimated. At the

³ More technically, direct effects are production changes associated with the immediate effects of changes in final demand (in this case, changes in recreation expenditures); indirect effects are production changes in those industries directly affected by final demand; induced effects are changes in regional household spending patterns caused by changes in regional employment (generated from the direct and indirect effects) Taylor et al. 1993, Appendix E, p. E-1)

county level or above, these expenditures, in turn, can be used in conjunction with a county or regional economic model to estimate economic output, jobs, job income and tax impacts associated with these expenditures.

4.2.3. Accomack and Worcester Counties Economic Impacts

The basic approach to estimating retail expenditures is to multiply per person per day expenditures by the number of visitors (visitor days) to obtain total expenditures. Previously, **Table 23** showed per person per day recreation expenditures by activity and by resident and non-resident for Region 5 (U.S. Department of the Interior 2007). **Table 20** showed recreation visits and participation by activity for the Refuge in 2010. Since the number of visitors to the Refuge is primarily based on car counts, and since there is no overnight visitation on the Refuge, the total number of visitors (minus environmental education participants) can be interpreted to reflect total number of visitor days (one person visiting the Refuge for at least part of one day). Using the above information, retail expenditures, economic output, jobs, job income and tax revenue can be estimated for the Accomack - Worcester County area.

Table 24 shows estimates of Refuge recreation-related expenditures, and associated economic output, jobs, job income and total (county, state and Federal) tax revenue. Total retail expenditures are estimated at \$113.8 million; economic output at \$150.3 million; jobs at 1,794, job income at \$48.6 million and total tax revenue of \$10.6 million.

Table 24

Chincoteague NWR: 2010 Visitor Recreation Expenditures (2010)			
(Dollars in millions)			
	Residents	Non-Residents	Total
Retail Expenditures	\$2.9	\$110.9	\$113.8
Economic Output	\$3.8	\$146.5	\$150.3
Jobs	45	1,749	1,794
Job Income	\$1.2	\$47.4	\$48.6
Total Tax Revenue	\$0.6	\$10.0	\$10.6

4.2.4. Chincoteague Economic Impacts from Refuge Visitation

This section estimates impacts to Chincoteague from Refuge visitation and related spending. The economic model used to estimate Accomack and Worcester County impacts cannot estimate impacts at the sub-county level. Therefore the following approach is used estimate Chincoteague impacts.

1. From **Table 21**, \$110.9 million in Refuge-related spending occurred in Accomack and Worcester County.
2. From the Wallop Island Flight Facility study, 45 percent of visitor spending occurred in Accomack County, or \$49.9 million. This represents Refuge-related visitor expenditures in Accomack County.
3. From the report, **Review of Revenues Received by Accomack County from the Town**, (Springsted Inc, 2010), about 85 percent of travel-related expenditures in Accomack County (see Table 16) occurred in Chincoteague.
4. Consequently, 85 percent of \$49.9 million (.85*49.9) is \$42.1 million. This represents Refuge-related spending in Chincoteague.
5. **Table 25** shows the lodging and prepared food excise tax collected by Chincoteague in 2010. The excise taxes for lodging and food are 3 and 4 percent respectively. Dividing the respective excise tax collected by the rate gives gross sales.

Table 25

2010 Chincoteague Lodging and Food Excise Tax Revenue and Estimated Gross Sales		
	Excise Tax Revenue Collected	Gross Sales
Lodging	\$602,800	\$20.1 million
Prepared Food	\$487,100	\$12.2 million
Total	\$1,089,000	\$32.3 million

6. Information on the percentage of gross sales of lodging and prepared food attributable to Refuge-related spending is not currently available. Given the volume of visitors to the Refuge and associated visits to Chincoteague, a figure of 80 percent will be used for estimating further impacts.

7. The portion of lodging and prepared food gross sales attributable to Refuge visitation is \$25.8 million (.8*\$32.3 million).

- | | | |
|----|---|----------------|
| 8. | Total Refuge-related expenditures in Chincoteague: | \$42.1 million |
| | Total Refuge-related expenditures on lodging and prepared food: | \$25.8 million |
| | Total Refuge-related expenditures on other retail expenditures: | \$16.3 million |

9. Estimates of job impacts using information from the Virginia Employment Commission on employment in Chincoteague. The accommodation sectors employed an average of 248 workers in 2010, prepared food sectors 203 and grocery sectors 53. Since the \$32.3 million in **Table 22** does not include grocery sectors, the dollar amount for these sectors must be estimated. The Accommodation sector plus the prepared food sector account for 451 jobs. At \$32.3 million, this results in 13.96 jobs per \$1 million in gross sales. To estimate gross sales for the grocery sectors, divide 53 by 13.96 to get \$3.8 million in gross sales for the grocery sector.

10. As in No. 7 above, 80 percent of \$3.8 million is \$3.0 million, which added to \$25.8 million equals \$28.8 million (adjusted for rounding).

11. Adjusting the figures in No. 8 above,

Total Refuge-related expenditures in Chincoteague:	\$42.1 million
Total Refuge-related expenditures on lodging and food:	\$28.8 million
Total Refuge-related expenditures on other retail expenditures:	\$13.3 million

12. Continuing with the job estimates, accommodation and food sectors accounted for 505 jobs in 2010. Using the 80 percent figure, 404 jobs are attributable to Refuge recreation visits. To estimate the number of jobs in other retail sectors, the 13.96 jobs per \$1 million in gross sales can be used. If other retail expenditures total \$13.3 million, then 13.3×13.96 results in 186 jobs associated with retail sales other than lodging and food.

13. Consequently, total Chincoteague jobs affected by Refuge visitor expenditures are estimated to be 590 (403 plus 187).

Table 26 summarizes the expenditure and employment impacts of Refuge visitation.

Table 26

Summary of Refuge Visitor Expenditures in Chincoteague and Associated Employment (dollars in millions)		
Sectors	Expenditures	Employment
Lodging and Food	\$28.8	404
All other retail sales	\$13.3	186
Total Impacts	\$42.1	590

A general check on the accuracy of these impacts compared with the Accomack -Worcester County model can be achieved by running the lodging and food gross sales in the Accomack -Worcester County model, using the 80 percent figure to adjust for Chincoteague’s share of Refuge expenditures, and comparing the job estimates with the actual jobs. This comparison is shown in **Table 27**. The model underestimates jobs for both sectors, but the estimates appear to be reasonable ball park estimates given the data used in the analysis.

Table 27

Comparison of Model Estimated Jobs with Actual Jobs			
Sector	Gross sales	Actual jobs	Model Estimated jobs
Lodging	\$20.1 million	248	211
Prepared Food	\$12.2 million	203	171

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5.0. Chincoteague NWR Budget Expenditures

5.1. Refuge Expenditures

As shown in **Table 28**, Chincoteague NWR spends \$3.4 million in operations and maintenance each year. Three quarters of this funding is spent on salaries to employees who live in the area. Employee benefits for these people are paid to the Social Security administration, insurance companies and other entities outside the refuge area so \$397,700 in benefit amounts are not counted in local spending.

Table 28

Chincoteague NWR: Budget Expenditures for fiscal year 2009		
	Dollars	Percent
Local Expenditures		
Personnel Compensation	\$1,507,699	44.8%
Transportation of People	\$4,206	0.1%
Transportation of Things	\$4,962	0.1%
Communications	\$30,769	0.9%
Utilities	\$43,304	1.3%
Contracts	\$115	0.0%
Building Repairs	\$1,196,301	35.5%
Equipment Maintenance	\$74,809	2.2%
Supplies and Materials	\$296,760	8.8%
Motor Vehicle Fuel	\$37,571	1.1%
Equipment-Capitalized	\$48,111	1.4%
Equipment-Non-capitalized	\$123,806	3.7%
Local Sub-Total	\$3,368,415	100.0%
Non-Local Expenditures		
Employee Benefits	\$ 397,735	Employee Benefits
Air Travel	\$29,040	Air Travel
Non-Expense Item		
Real Property	\$ 20,325	Real Property
Grants	\$ 909	Grants
Organization Total	\$ 3,816,424	

Changes in the value of real property do not necessarily lead to local economic activity. Purchases of land, for example, are best understood as a change in the form of assets rather than expenditures. In FY2009, Chincoteague recorded a \$6,198 improvement of staff quarters at the refuge. This is not included in local expenditures.

Grants for research efforts at refuges often go to nearby research institutions to study significant wildlife issues. Although much of this funding may return to the local economy as researchers work in the area, much leaves the immediate area and so grant funding is not counted as local spending in this study.

Refuge spending in the local economy paid for both locally produced items and things imported into the region for sale. So all of the expenditures did not result in increased local output. **Table 29** shows \$2.7 million had a direct effect on local output. Typical purchasing patterns for households and industries in the region suggest the remaining spending flowed to suppliers outside the area. About \$663,900 became compensation for local workers in 36.3 jobs. The iteration of refuge spending through the local economy generated \$3.5 million in total output and 44.4 jobs.

Table 29

Chincoteague NWR: Economic Impacts of Refuge Budget Expenditures						
Sector	Output (\$ 2010)		Employee Compensation (\$ 2010)		Employment (Number of Jobs)	
	Direct	Total	Direct	Total	Direct	Total
Agriculture	2,100	4,900	100	400	0.0	0.0
Utilities	56,500	78,900	8,400	11,600	0.1	0.1
Construction	100	19,200	0	4,900	0.0	0.2
Manufacturing	126,800	142,100	33,600	36,200	0.7	0.8
Trade	283,600	390,500	90,200	125,900	4.1	5.7
Transportation	7,700	14,000	2,400	4,300	0.1	0.2
Information	29,300	75,800	4,300	11,600	0.1	0.2
Finance	253,500	539,500	12,900	40,900	0.5	1.7
Lodging	99,000	176,700	30,100	53,900	1.5	2.7
Government	22,400	49,500	8,000	17,800	0.1	0.3
Other	1,789,800	2,042,800	473,900	566,600	29.2	32.5
Total	2,670,800	3,533,900	663,900	873,900	36.3	44.4
Multipliers		1.32		1.32		1.22

Most of the increased output and employment occurs in the Finance, Trade, and Other Services industries. The Other sector includes upkeep for buildings and payments for planning services. Much of what employees buy locally falls into the trade and finance categories so these sectors appear to have very large multipliers. Chincoteague's economy is highly seasonal so earnings by seasonal laborers may not be spent within the region but returned to the workers' distant place of residence. This may help explain the high leakage and low multipliers.

5.2. Refuge Revenue Sharing and Payments in Lieu of Taxes

Chincoteague contains 13,433 acres of fee lands that were appraised at \$42.3 million in FY2008. The refuge revenue sharing fund paid \$99,300 to Accomack County, Virginia, \$2,900 to Chincoteague, and \$587 to Worcester County, Maryland. The refuge earned no funds for refuge revenue sharing.

None of Chincoteague's lands were reserved from the public domain so PILT payments were not made for this refuge.

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Beach Access News

Town of Chincoteague
Assateague Beach Access Committee

August 2012



Patrick J. Hendrickson / Highcamera.com

Mayor Tarr sends letter of appreciation to the National Park Service and US Fish and Wildlife Service for restoring our beach access.

Following repair of last season's storm damage, the recreational beach at Tom's Cove has been better than ever this summer. Parking areas have been moved further west providing a nice wide open seashore that may even allow for natural sand dunes to be established.

Assateague Island National Seashore Superintendant Trish Kicklighter describes the ongoing success of their management strategy and offers to work together for a viable and sustainable solution.

"Our parking lot management plan for the past several years has been to create a small berm in front of the parking lots and to set the berm and parking lots at an elevation that prohibits overwash during normal lunar, high tides but allows for overwash during larger storms ... In front of parking lot four, we are even seeing some naturally forming dunes. Because we are seeing new land on the west and naturally forming dunes, we believe our management approach is working."

Trish Kicklighter in Letter to Mayor Tarr, May 31, 2012 (visit www.chincoteague-va.gov/beach-access)

**Will the investment of \$700,000 tax dollars be protected from damage this winter?
Take a look at what a partnership with the National Park Service can do:**

BALLSTON BEACH BARRIER DUNE COMMUNITY RESTORATION PROJECT – Cape Cod National Seashore Safe Harbor has developed an innovative restoration model, which uses storm winds to restore eroded coastal habitat. This low-tech system uses specific patterns of 24" sand fencing, to duplicate the wind resisting performance of beach grass. This passive strategy stabilizes eroded areas while collecting new sand, often raising elevations up to two feet a year. The fencing system can be quickly installed, using a rubber mallet to tap each slat into the sand. No excavation or posts are required. New layers of fencing can be placed to create a form compatible with adjacent dune profiles. (Read more at www.SafeHarborEnv.com)



Beach Access News

NASA Wallops Flight Facility has a new beach...and a partnership with the USACE!

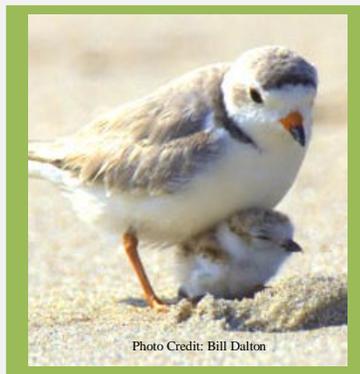
The beach is the centerpiece of the Wallops Island Storm Damage Reduction project. Built in partnership with the U.S. Army Corps of Engineers, the beach serves as a buffer between the ocean and Wallops' critical launch assets. Paul Bull, program manager for the beach replenishment project said "Multiple programs rely on our launch assets each year, not to mention upcoming commercial space station resupply missions, and this beach will help mitigate against natural threats."

Engineers designed the sea wall and beach to withstand everything from estimated potential sea-level rise to the proverbial 100-year storm. Now, with the completion of the beach, workers are in the process of **installing sand fencing to help protect the beach from erosion, and in the fall beach grass will be planted.** (Emphasis added to article - <http://www.nasa.gov/centers/wallops/news/beach.html>)



The Town of Chincoteague has proposed a more affordable solution for protection of the shoreline at Tom's Cove (1-2-3 Common Sense Plan) however the principles are the same: partnership with our Federal agencies --- and install sand fence and plant beach grass to maintain a natural dune system!

Beach Access News



Congratulations to the US Fish and Wildlife Service! Regional refuge employees were recognized as 2011 Recovery Champions for their work to recover piping plover populations. “Recovery Champions are helping listed species get to the point at which they are secure in the wild and no longer need Endangered Species Act protection” said Service Director Dan Ashe. According to a report by the Center for Biological Diversity (www.esasuccess.org) the U.S. Atlantic coast population has reached its overall recovery goal in 3 of the last 5 years ...*all while allowing public beach recreation for over 1 million visitors per year at Chincoteague National Wildlife Refuge!*

USFWS Northeast Region has issued a Newsletter describing possible changes in the CCP

The Town of Chincoteague hopes to reach a firm agreement on several key issues so that we can return to a role of support and cooperation with the FWS to achieve the best Comprehensive Conservation Plan (CCP) for the future. The Town of Chincoteague has made suggestions to be considered within the CCP process...the August FWS newsletter starts to check off on progress:

- Recreational Beach ACCESS (no reduction) must be assured by more than a Refuge Manager’s Compatibility Determination (i.e. Beach Road from Chincoteague Island to the Atlantic Ocean Seashore)**
- Recreational Beach USE (no reduction) must be assured by more than a Refuge Manager’s Compatibility Determination (i.e. Over 4 miles of shoreline set aside and assigned for public recreation on the southern end of Assateague Island)**
- ✓ **An assigned area for NPS management of the public recreational beach and the inter agency agreement will be a part of the draft and final CCP document.**
- The Pony Management Plan will be a part of the draft and final CCP document.**
- ✓ **1,000 Parking Spaces (no reduction) will continue to be maintained in close proximity to the recreational beach.**
- ✓ **Transit shuttle service to the public recreational beach shall only be provided in addition to the minimum 1,000 spaces of convenient individual vehicle parking.**
- ✓ **Federal purchase of land within the Town of Chincoteague must not proceed without resolving issues of local tax revenue loss, priority of local law enforcement, local land use control, expansion of Refuge/Seashore boundaries, and approval of CCP/GMP management plans. The resolution of Town Council has been supported by Accomack County and the Virginia General Assembly.**
- Completion of a Storm Damage Protection Plan for the Toms Cove/Atlantic Ocean Shoreline by the USACE in cooperation with DOI Secretary Salazar shall be incorporated into the EIS and CCP preferred option for implementation.**
- The 1-2-3 Common Sense Plan principles prepared by the Town to adapt the current management plan for the future shall be incorporated in the draft CCP.**
- ✓ **The CCP Planning Team shall communicate and work with Local and State government regularly during the CCP/EIS preparation.**

Beach Access News

"The Plan has to acknowledge what could happen at the beach. Beach recreation was completely left out of the Wildlife Refuge goals. 'Swimming' should be part of the permitted recreation and included in the CCP"

Mayor Tarr, August 2012

The U.S. Fish & Wildlife Service August 2012 Newsletter provides a bridge between the last public comment period and the publication of a draft CCP in December.

On August 23rd, the Chincoteague Town Council and Beach Access Committee had the opportunity to meet Joe McCauley, the new regional lead of the refuge CCP core team. His style of quiet, considered communication was well received. The newsletter shows that ideas and issues important to the community may be reflected in the draft CCP, however, there is still more work to be done.

Prime Hook NWR in Delaware has issued a draft CCP/EIS for comment that gives a preview of what Chincoteague can expect in several months. The comment period was extended and people have supported filling the breached shoreline and requested a plan for rebuilding dunes.

"Swimming and sunbathing are not priority public uses, but are general uses. They do not, as standalone activities, contribute to the fulfillment of refuge purposes, and would detract from the refuge staff's responsibilities to protect and manage fish, wildlife, and plants and their habitats, as well as detract from administering priority uses. The refuge does not have the facilities or staff to manage these uses. These uses are not consistent with Service policy on secondary uses and are not consistent with any approved refuge management plan. Safety is also an issue. The general uses of swimming and sunbathing are, therefore, determined to be inappropriate."
(Prime Hook CCP Appendix E)



Prime Hook plan may become a model for dealing with rising seas By Jon Hurdle www.delawarefirst.org

'Rising sea level is the main threat to the refuge and the main driver behind the federal agency's long-awaited Comprehensive Conservation Plan.'

Actions Considered but Eliminated from Detailed Analysis - **Shoreline Stabilization**

"All oceanfront and bay shorelines erode over time, in part as a natural process and in part as a process exacerbated and accelerated by human activity... Human activities and alterations on the coast can also be as catastrophic as hurricanes. .. An ecologically ideal and sustainable management response is to allow natural retreat. ..Shoreline stabilization using on-site material can also be accomplished by mechanically moving sand that has washed landward from the dunes back onto the dune line. The material can be reconfigured to create berms and dunes and provide shoreline stabilization ... **this approach has been dismissed from further consideration.**" (Prime Hook CCP Chapter 4)

Comments or Questions may be sent by mail to the Town of Chincoteague, 6150 Community Drive, Chincoteague, VA 23336 or by email to: wneville@chincoteague-va.gov.