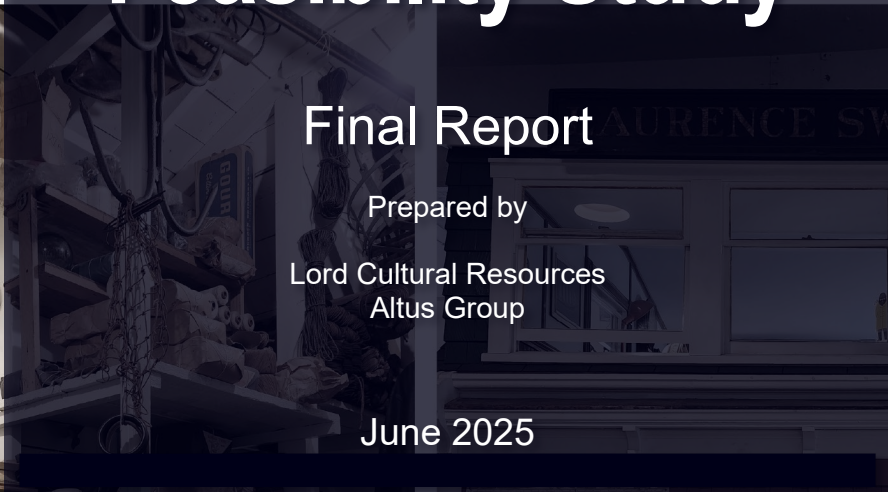


W. Laurence Sweeney Fisheries Museum Relocation Feasibility Study



Final Report

Prepared by

Lord Cultural Resources
Altus Group

June 2025



Lord Cultural Resources is a global professional practice dedicated to making the world a better place through culture.

We assist people, communities, and organizations to realize and enhance cultural meaning and expression.

We distinguish ourselves through a comprehensive and integrated full-service offering built on a foundation of key competencies: visioning, planning and implementation.

We value and believe in cultural expression as essential for all people. We conduct ourselves with respect for collaboration, local adaptation and cultural diversity, embodying the highest standards of integrity, ethics and professional practice.

We help clients clarify their goals; we provide them with the tools to achieve those goals; and we leave a legacy as a result of training and collaboration.

Our Toronto office is located within the traditional territory of many nations, including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples. Our New York office is located on the traditional lands of the Lenape peoples. Our Long Beach office is located on the land of the Tongva/Gabrieleño and the Acjachemen/Juaneño Nations, who have lived and continue to live here.

We encourage you to acknowledge the presence of the people who came before, wherever you are.

TABLE OF CONTENTS

- Executive Summary 1**
- 1. Introduction 4**
 - 1.1 Background to and Objectives of Study 4
 - 1.2 Methodology 5
- 2. Contextual and Comparables Analyses 7**
 - 2.1 Comparative Sources of Operating Revenues 7
 - 2.2 Benchmarks from Selected Fisheries Museums 8
 - 2.3 Benchmarks from Other Existing Museums in Yarmouth 13
- 3. Sweeney Fisheries Museum Operational Assessment and Potential Markets Analysis 17**
 - 3.1 Existing Sweeney Fisheries Museum Operational Assessment 17
 - 3.2 Analysis of Potential Markets 21
- 4. Recommendations and Assumptions 30**
 - 4.1 Core Planning Directions 30
 - 4.2 Visitor Experience Concept 32
 - 4.3 Strengths and Weaknesses of 275 Main Site 35
 - 4.4 Strengths and Weaknesses of 275 Main Street Building 36
 - 4.5 Proposed Spaces and Facilities 37
 - 4.6 Operations 45
 - 4.7 Other Assumptions 49
- 5. Financial Analyses 50**
 - 5.1 Summary of Capital and Project Costs 50
 - 5.2 On-Site Attendance Projections 54
 - 5.3 Projected Operating Revenues 59
 - 5.4 Projected Operating Expenses 63
 - 5.5 Summary of Projections 66
- Appendix A: Acknowledgments A 1**
- Appendix B: Detailed Capital Cost Estimate B 1**

EXECUTIVE SUMMARY

This feasibility study is focused on the relocation and expansion of the W. Laurence Sweeney Fisheries Museum from its current location on the second floor of a fish processing plant to the former YMCA building in a downtown building at 275 Main Street currently known as Mariners on Main in Yarmouth.

The relocation of the Fisheries Museum is intended to result not only in a better location and larger spaces but also an enhanced visitor experience capable of increasing the Museum's relevance, impact and overall importance to the heritage, cultural and tourism ecosystem of Yarmouth and area. Objectives for this relocation feasibility study also include substantially increasing the attendance and revenue potential of the Fisheries Museum while being mindful of controlling operating costs and also seeking to meet the Town's goals associated with downtown revitalization and tourism development. Equally as important, planning for the future Fisheries Museum must continue to respect the original intent of the Sweeney family in honouring the legacy and impact of W. Laurence Sweeney and Sweeney Industries on Yarmouth and the entire southwestern Nova Scotia region.

The recommendations and financial projections in this feasibility study were based on analysis of the experience of other selected fisheries museums and existing museums in and near Yarmouth. The analysis also included an evaluation of the existing Sweeney Museum operation and analysis of potential resident, school and tourist markets for Yarmouth, as well as a workshop and interview process.

The key recommendations/assumptions in this feasibility study are as follows:

- A repositioning to become the Yarmouth Fisheries Museum rather than the Sweeney Fisheries Museum in order to help increase potential attendance and revenue levels, both earned and contributed.
- Allocation of only the front part of the space within 275 Main Street to the Fisheries Museum with the rest of the building available for non-museum uses that do not compete with private sector property owners. However, an important objective is that the overall building remain a community hub.

- The inclusion of a small Tourist Information Kiosk within the Museum lobby to expose those seeking tourist information to the Museum, while Museum visitors would learn about other things to do in the region and province.
- The interpretive focus will be on multiple perspectives and multiple disciplines, including natural history and STEM (science, technology, engineering and mathematics) education, as well as linkages to the various cultures that make up the region, particularly Indigenous cultures.
- Families with younger children are seeking hands-on interactive opportunities which are often science or natural history-related leading to a recommended children's exhibition gallery space that would also include birthday party opportunities.
- It will likely take 2-3 years before the Fisheries Museum is operational at 275 Main Street. This study has therefore recommended modest enhancements to the existing Sweeney Museum operation to help increase attendance and earned income levels.
- The recommended pre-design visitor experience includes a story-based thematic approach to focus both on the fishery as a natural resource and the business and people of the fishery. This will require some collections development.
- The recommended pre-design space program for the Yarmouth Fisheries Museum is for 13,200 net useable sq. ft. or a rounded 14,800 gross square feet. This includes 6,900 sq. ft. of exhibition space.
- Recommended admission charges are as follows:
 - Adult (25-64): \$10.00
 - Senior (65+): \$8.00
 - Youth (13-24): \$6.00 – regardless of whether or not is a student
 - Child (3-12): \$4.00
 - Non-school groups: At least 15 persons with 20% discount on regular admission
 - Guided school groups: \$4.00 per student, free to teacher
 - Toddlers/Infants (0-2), researchers, other unpaid: \$0.00
- Other revenue centres include retail sales, venue rentals, public programs, memberships, and a fundraising event.
- The Museum is recommended to remain a seasonal operation from the Victoria Day to Thanksgiving weekends with public hours on Tuesday through Sunday from 10:00 a.m. to 4:30 p.m.
- It is assumed that the governance of the relocated Fisheries Museum will continue to be by the Town of Yarmouth. Regarding staffing, the existing Sweeney Fisheries Museum is managed by the Town of Yarmouth Museum/Grants Coordinator supported by one seasonal staff and a part-time staff person, currently comprising about 1.75 existing full-time equivalent (FTE) staff. In the context of the relocated, expanded and enhanced Fisheries Museum, we assume a growth in Museum staff to 3.0 FTE staff

The pre-design (Class D) capital cost estimates for the Fisheries Museum part of the building, both exterior and interior, lead to a renovation capital cost of about \$7,804,000. In addition, the capital costs associated with exhibitions for the relocated and enhanced Yarmouth Fisheries Museum and other soft costs combine for \$3,141,000. The combined renovation and soft costs are about \$10,945,000.

Regarding operations, on-site attendance levels are estimated to increase substantially from the current attendance level of close to 2,000 visitors to stabilize at about 9,000 visitors per year, still based on a seasonal operation.

Reflecting a needed but modest growth in staffing levels, the total annual operating budget, in 2025 dollars, is estimated to increase from the \$39,000 range in 2024 to about \$242,000 in the stabilized Year 3. Earned income levels are projected to stabilize at about 53% of total operating revenues to reflect in-kind occupancy cost support from the Town of Yarmouth and limited staffing costs, as well as an emphasis on generating earned income that is not possible in the existing Sweeney Fisheries Museum.

After taking projected operating expenses into account, the gap between projected expenses and revenues is about \$77,000 in Year 1 and growing to over \$84,000 by Year 3. This will necessitate additional financial support from the Town of Yarmouth and the Province of Nova Scotia as well as substantially more private support from private supporters including the fishing industry, other corporate, foundation and family supporters of the Yarmouth Fishing Museum.

The projections reflect the reality that a relocated, expanded and enhanced Yarmouth Fisheries Museum will lead to better service to the community and region and result in increased attendance and earned income, but that higher staffing and other operating costs will exceed the revenues that may be generated.

1. INTRODUCTION

This chapter outlines the background to and objectives of this Relocation Feasibility Study for the W. Laurence Sweeney Fisheries Museum to larger and enhanced facilities in Yarmouth Nova Scotia, and the methodology used to conduct it.

1.1 BACKGROUND TO AND OBJECTIVES OF STUDY

Fishing was and remains an important part of the economy, heritage and culture of southwestern Nova Scotia and Yarmouth in particular. One of the leading companies in the Atlantic fishing industry was founded in Yarmouth by W. Laurence Sweeney in 1923. The company grew to involve all aspects of the fishing industry - from catching to processing to shipping. The 80 fishing vessels of the company ventured far beyond Atlantic Canada to the United States, the Caribbean and the Gulf of Mexico.

Recognizing the importance of Mr. Sweeney and his company to Yarmouth and Atlantic Canada, the Sweeney legacy was preserved and honoured by his family members through establishment of the W. Laurence Sweeney Fisheries Museum. The collections and exhibits were later gifted to the Town of Yarmouth with a mission “to tell the story of the men and women of Laurence Sweeney Fisheries Ltd.” While very important, this study has recommended the widening of the concept beyond the Sweeney legacy, as discussed further in Chapter 4 of this report.

The existing Fisheries Museum is located on the second floor of an operational fish processing plant. The space is small and there are a variety of deficiencies that have a negative impact on the visitor experience and operation of the museum. However, the impetus for the relocation is that the current owner of the existing space, Scotia Gardens Seafood, has identified an alternative use and has requested that the Sweeney Fisheries Museum be relocated when possible.

Following a review of potential alternative sites by an independent consultant, the Town of Yarmouth identified the most appropriate future location for the Fisheries Museum as the former YMCA building in downtown Yarmouth at 275 Main Street, in a building known as Mariners on Main. That building and site is assumed for the purposes of this Relocation Feasibility Study but is substantially larger than required by the Fisheries Museum, indicating opportunities for other currently undetermined community uses in the building. Chapter 4 also includes an analysis of the strengths and weaknesses of the 275 Main Street site and facility.

The reason that 275 Main Street is available to the Fisheries Museum is because the Mariners Centre several miles from the downtown is being expanded beyond the existing arena to include a barrier-free aquatics centre with a 25-metre, six-lane pool and a leisure pool for swimming. The Mariners Centre also includes therapy and fitness activities, along with a fitness centre with cardio equipment, weights and wellness programs, an indoor walking track and multi-purpose spaces. It is also reported to include a relocated Yarmouth Sports Heritage Museum, which is currently located at 435 Main Street.

Taking into account that the expanded Mariners Centre will not be operational until late 2026 and that recreational amenities need to continue to be available for Yarmouth residents, it means that the Fisheries Museum cannot likely be relocated until mid-2027. Therefore, some consideration is needed for low-cost enhancements at the existing Sweeney Fisheries Museum operation until that time. A few suggestions are set out in Chapter 4, recognizing that the scope of this study is focused on the relocation to 275 Main Street.

The relocation of the Fisheries Museum is intended to result not only in larger spaces but also an enhanced visitor experience capable of increasing the Museum's relevance, impact and overall importance to the heritage, cultural and tourism ecosystem of Yarmouth and area. Objectives for this relocation feasibility study include substantially increasing the attendance and revenue potential of the Fisheries Museum while being mindful of controlling operating costs, while also meeting the Town's goals associated with downtown revitalization and tourism development. Equally as important, planning for the future Fisheries Museum must also respect the original intent of the Sweeney family in honouring the legacy and impact of W. Laurence Sweeney and Sweeney Industries on Yarmouth and the entire Southwestern Nova Scotia region.

To plan for, assess and seek to maximize the feasibility of the relocation of the Sweeney Fisheries Museum to 275 Main Street, the Town of Yarmouth issued a request for proposals to consultants to conduct the relocation feasibility study. Lord Cultural Resources was selected.

1.2 METHODOLOGY

To meet the objectives of this relocation feasibility study, Lord Cultural Resources:

- Reviewed background documents provided to us, as referenced in this report. This includes an evaluation of the existing Sweeney Museum facility and three potential relocation sites prepared by Richard A. Sanderson, as well as various municipal planning documents.
- Compiled and analyzed available data regarding the sources of operating revenues for Canadian and American museums in comparison to the Sweeney Fisheries Museum.
- Led a Vision/Assumptions/SWOT Workshop with Town Councillors and staff.
- Conducted interviews with selected key informants. Please see Appendix A for those who took part in the workshops as well as the interview subjects.

- Evaluated data regarding the markets, operations, and finances of the existing Sweeney Fisheries Museum.
- Analyzed data and interview feedback regarding potential resident, school, and tourist markets for Yarmouth and the region.
- Prepared site, facility, visitor experience and operational recommendations for the relocated future Fisheries Museum as well as limited recommendations for the existing Sweeney Museum.
- Prepared a Phase 1 report which was followed by a video meeting with the client which led to agreed pre-design assumptions that have formed the basis for a capital cost estimate and projections of attendance, operating revenues and expenditures for the future Fisheries Museum in a Draft Final Report.
- Received written feedback to the Draft Final Report, followed by a video meeting, which led to modifications in this final report, which includes an Executive Summary.

The next steps following the completion of this feasibility study are for the Town of Yarmouth to determine whether or not to move toward implementation of the project. If so, this will require engaging architects to design the renovation of the building as well as exhibition planners/designers. The architectural and exhibition designs will provide the basis for federal and provincial capital grant applications and private fundraising.

The applications for capital funding support will be more likely successful if there is a Town commitment to not only providing the space but to also help with operating costs. In addition, a Yarmouth Fisheries Museum Foundation should also be established to raise private funds to help support operating costs beyond the earned income levels projected in this feasibility study.

Key findings, conclusions and recommendations in this report are highlighted in bold italics throughout.

2. CONTEXTUAL AND COMPARABLES ANALYSES

This chapter seeks to establish a realistic definition of success for the future Fisheries Museum by considering benchmarking data regarding museums in Canada and the United States, as well as other selected fisheries museums elsewhere and other existing museums in Yarmouth. The data help to inform the recommendations and projections in this relocation feasibility study.

2.1 COMPARATIVE SOURCES OF OPERATING REVENUES

The following table compares the sources of operating revenue for the existing Sweeney Fisheries Museum to average and median revenue figures, respectively, for Canadian and American museums. A more detailed analysis of the existing Sweeney Fisheries Museum is set out in Chapter 3.1.

The data indicate that in Canada, earned income (admissions, retail, rentals, programs, memberships, etc.) generated about 38% of total operating revenues compared to 35% for American Museums. For the Sweeney Museum it was lower at 16% in 2024, reflecting limited attendance and no revenue from retail, rentals, memberships or programs. The Sweeney Museum also receives very little private support, whether from the fishing industry or other potential private funders.

In Canada, government funds are the primary source of operating funds (49%), whereas there is more private support (35%) plus endowment income (11%) in the United States. ***The data confirm the reality that although earned income should increase for the relocated Fisheries Museum, private and government support, especially from the Town of Yarmouth, will need to increase as well.***

Comparative Sources of Operating Revenues	Fisheries Museum, 2024	Canadian Museums, 2017	American Museums, 2017
Earned Income as % Total	16%	38%	35%
Government Sources %	83%	49%	19%
Private Donations %	1%	11%	35%
Interest/Endowment %	0%	2%	11%

Sources: Fisheries Museum; Canadian Heritage Survey 2017; American Alliance of Museums National Report, 2017
Canadian figures represent averages and U.S. figures medians

2.2 BENCHMARKS FROM SELECTED FISHERIES MUSEUMS

To provide benchmarks for the recommendations and projections for the future relocated Fisheries Museum in Yarmouth, this section focuses on the experience of the Fisheries Museum of the Atlantic in Lunenburg Nova Scotia and the New Bedford Fishing Heritage Center in Massachusetts.

The description and analysis of both the Lunenburg and New Bedford Fisheries Museums are as follows, including potential implications for the future Fisheries Museum in Yarmouth.

2.2.1 Fisheries Museum of the Atlantic



The Fisheries Museum of the Atlantic is located in Lunenburg, Nova Scotia, about 2.5 hours' drive from Yarmouth and 1.25 hours from Halifax, making it more of a challenge to attract residents and tourists originating in the Halifax area to travel a longer distance to Yarmouth.

The Fisheries Museum of the Atlantic is located along the Lunenburg waterfront in three buildings that encompass a former fish processing plant and in the historic part of the

town that has been recognized by UNESCO as a world heritage site. There is substantial free on-site parking. The site hosts the famous *Bluenose II* that is moored next to the main building during the winter months but which moves its base of operations to Halifax in the summer. The buildings encompass about 25,300 sq. ft. of exhibition space, in some areas on three floors. Guided tours are not offered because of a substantial number of interpreters on the exhibition floors.

A long-standing 1,500 sq. ft. orientation exhibition area that contained aquarium displays was closed because of the costs to maintain it as well as concerns by a segment of the population about animals in captivity.

The 100-seat Ice House Theatre offers scheduled films and programs throughout the day. The Museum plans to offer shorter films on a half-day schedule. We have recommended an orientation theatre for the Fisheries Museum in Yarmouth.

Despite being only about one hour's drive from Halifax, having access to sizable tourism markets and being a substantially sized museum, the Fisheries Museum of the Atlantic operates only on a seasonal basis from mid-May to late October. This helps to confirm that even in a larger building with enhanced exhibits and programs, the Fisheries Museum in Yarmouth should continue to be a seasonal operation.

Admission charges are as follows:

- Adults (age 18+) - \$14.50
- Seniors (age 60+) - \$12.00
- Students (post secondary with card) - \$9.00
- Youth (ages 6-17) - \$4.00
- Children (5 and under) – Free
- School groups – most free but some charged \$4,00 if a special program
- Family (2 adults and their children ages 6 – 17) - \$30

Charges for season passes are:

- Family - \$60.00
- Adult - \$30.00
- Child - \$10.00

Total in-museum attendance in 2024 was 35,869 plus others for on-site activities, or an estimated combined 55,000 on-site visitors. Pre-COVID attendance was substantially higher. This helps to emphasize that despite a larger facility and enhanced visitor experience there is a need for realistic attendance expectations for the Fisheries Museum in Yarmouth.

About 81% of visitors were tourists as opposed to 19% regional residents, of which 2% arrived in school groups. About 33% of non-school visitors are seniors with children 17 and under at 16%. About 60% of non-school visitors are estimated to be women.

Although part of the Nova Scotia Museum system, the Fisheries Museum of the Atlantic is governed by the Board of Directors of the Lunenburg Marine Museum Society. The Museum is operated by the following on-site personnel.

- 7 - Full-time, year-round – 35 hrs/wk, 52 weeks/yr
- 25 - Full-time, seasonal – 35 hrs/wk, less than 52 weeks/yr
- 1 - Part-time, year-round – 30 or less hrs/wk, 52 weeks/yr
- 5 - Part-time, seasonal- 30 or less hrs/wk, less than 52 weeks/yr

There is no volunteers program.

The annual operating budget of the Fisheries Museum of the Atlantic is close to \$2.7 million, of which 43% is from the province of Nova Scotia, with 57% from primarily earned income. Since it is part of the Nova Scotia Museum system the Museum also benefits from centralized services. Noteworthy is that donations generated less than \$3,900 confirming the difficulty in raising private funds for a government museum, and suggesting the importance of a foundation to generate private support for the future Fisheries Museum in Yarmouth.

The Salt Store Gift Shop is large at about 2,500 sq. ft. and includes a product line that goes beyond fishery and maritime-related books to include souvenirs and children’s items and products ranging from art and home décor to clothing and accessories, even for pets. As set out in Chapter 4 we have recommended a small gift shop for the relocated Fisheries Museum in Yarmouth. The Gift Shop is the largest source of earned income, as shown below, while the seasonal restaurant is leased to a private operator.

The main sources of non-government operating revenues are as follows:

Retail	\$574,237	37.1%
Admissions	\$326,691	21.1%
Lease & Rent (Restaurant)	\$133,092	8.6%
Parking	\$129,286	8.3%

2.2.2 New Bedford Fishing Heritage Center



The New Bedford Fishing Heritage Center in Massachusetts is about 60 miles from Boston and 30 miles from Providence, Rhode Island and therefore has access to much larger nearby markets than is available to the Fisheries Museum in Yarmouth. The New Bedford Fishing Heritage Center is located near (but not on) the waterfront within the New Bedford Seaport Cultural District. It is one block from both the much larger Whaling Museum and the Visitor Center of the New Bedford Whaling National Historical Park. The site has limited on-site parking but there is ample free parking in a garage a block away.

The New Bedford Fishing Heritage Center opened in 2016 in a small, leased space of only about 3,500 sq. ft. of which 3,000 sq. ft. is exhibition space, and thus about the same size as the Sweeney Fisheries Museum. As is the case with the Sweeney Museum, the owner is asking the Fishing Heritage Center to relocate.

The mission of the Fishing Heritage Center is to “present the story of New Bedford’s fishing community to the world.” It is an independent not-for-profit museum that is not connected to either the City of New Bedford or the Whaling Museum. The exhibit focus is on both the fishing industry and seafood. The exhibition area includes two benches in front of a large screen in which films are shown to visitors. We have also recommended film opportunities for visitors to the Fisheries Museum in Yarmouth but ideally with seating on more than two benches.

To compensate for the limited exhibition space, the New Bedford Fishing Heritage Center has created a variety of online digital offerings to tell stories. These include:

- At Sea
- On Shore
- Sustaining the Resource
- Port of New Bedford
- Stories of Immigration
- Women’s Work
- A Changing Way of Life
- Virtual Vessel Tour
- Industry Timeline
- Herstory

The Fishing Heritage Center is open from 10 to 4 on Thursdays through Sundays except during the winter months when it is closed on Sundays. However, school, cruise and other group tours may attend on any day of the week if they book in advance. During every second Thursday of each month, the attractions in New Bedford offer free admission to AHA! Night (Art, History, Architecture) which leads to higher local attendance and is sponsored by the Southcoast Community Foundation. We have also recommended a focus on sponsorships for the Fisheries Museum in Yarmouth.

Taking into account the small size of the space, admission prices at the Fishing Heritage Center are \$8 for adults and \$5 for seniors and students, with free admission for children 12 and under. Self-guided school groups are free but school groups that utilize program and guided experience opportunities are charged \$10 per student.

The small space also resulted in a relatively low 4,118 on-site visitors in 2024 plus 2,397 persons served through outreach and other off-site programs. About 15% of on-site visitors arrive in school groups, with other regional residents at about 20% and tourists 65%. Of the tourists, about half arrive on small 150-passenger cruise ships operated by American Cruise Lines. None of the larger ships stop in New Bedford. There are also opportunities for the Fisheries Museum in Yarmouth to increase attendance from cruise ships, although tenders are required because of a shallow harbour.

Local residents primarily attend on-site programs, which accounted for 44% of on-site visitors in 2024, plus 37% who attend the off-site programs which range from cooking to concerts. About 14% pay the admission charges for the exhibitions.

The relatively low attendance at the New Bedford Fisheries Museum is explained not only by the small size of the space, but also because the visitor experience has not changed substantially, as is also the case for the Sweeney Fisheries Museum. The relatively low attendance is despite proximity to the much larger Whaling Museum, which attracts about 80,000 annual visitors at a \$23 adult admission charge, which increases to \$27 if the visitor chooses to see a 3D film. Visitors to the Whaling Museum are offered an opportunity to attend the Fishing Heritage Center for \$4, but relatively few do it because of the perception that a Whaling Museum and Fishing Museum are not substantially different.

The relatively low attendance at the New Bedford Fishing Heritage Center by children, despite free admission, reflects limited hands-on, interactive programs and not enough emphasis on science, but more science is planned for the future. This study has recommended a focus on more hands-on and science opportunities for the relocated and expanded Fisheries Museum in Yarmouth, including in a children's gallery.

As is common for museums of this type, including the Sweeney Fisheries Museum, the market in New Bedford tends to be older. And whereas the Sweeney market is about 65% male, the various food related programs offered in New Bedford result in an even male-female split.

The Fishing Heritage Center has about 200 memberships in various lower and upper-level categories plus 25 corporate memberships. It receives very limited financial support from the fishing industry, but that is expected to grow in the context of a future expansion, which should also be the case for the Fisheries Museum in Yarmouth.

In 2024, the annual operating budget of the New Bedford Fishing Heritage Center was about \$351,000, of which \$58,000 (16%) was from earned income sources, excluding a fundraising dinner, and thus about the same as the Sweeney Fisheries Museum. The annual fundraising dinner, called Seafood Soiree, grosses \$75,000, or 21% of total operating revenues.

In addition to admissions, the earned income includes revenue from a small 100-sq. ft. retail space as well as modest revenues from venue rentals, memberships and public programs. There is no food service offered, not only because of the small space but also because of proximity to downtown restaurants, which is also the case in Yarmouth. The large majority of operating revenues at the New Bedford Fishing Heritage Center are from government and private sources.

The New Bedford Fishing Heritage Centre operates with a full-time staff of 2 supported by 3 part-timers and 30 regular volunteers. Future plans include a relocation and expansion, but both the site and extent of the growth in space is unknown at this time.

2.3 BENCHMARKS FROM OTHER EXISTING MUSEUMS IN YARMOUTH

Other existing museums in Yarmouth include the Yarmouth County Museum and Archives, the Firefighters Museum of Nova Scotia and the Harbourfront Museum. These are discussed below to also provide benchmarks for the recommendations and projections in this relocation feasibility study. Also considered is available benchmarking data from the previously operated Yarmouth satellite of the Art Gallery of Nova Scotia and from the nearby Wedgeport Sport Tuna Fishing Museum.

2.3.1 Yarmouth County Museum and Archives



The Yarmouth County Museum and Archives opened in 1999 in a residential area and is the largest museum in town. It is in a former church building that has been expanded and encompasses 12,600 sq. ft., about triple the size of the Sweeney Fisheries Museum.

Next to the Museum is the historic Pellton Fuller House, which was previously separately charged and is a satellite with the same charges as the Museum and Archives.

The Museum has important artifacts and archives but is not owned and operated by Yarmouth County/Municipality, but rather by the Yarmouth Historical Society. It is a year-round operation with more open days and hours from June to September (Monday to Saturday) than for the rest of the year when open closed on Mondays and hours are limited to 2-5 p.m. However, there are opportunities for schools to pre-book field trips during morning hours.

Annual attendance is about 4,500 of which only about 200 visitors attend as part of school groups, largely because of the cost of bus transportation. Among non-school visitors, about 70% are regional residents and 30% are tourists. The market tends to be

female and older but the recent addition of an escape room attraction has appeal to younger visitors.

The Museum offers a membership at a cost of \$15 for students, \$30 for individuals and \$45 for families. There are about 250 memberships. The Museum benefits from private sector sponsored free admission during the months of January through April. School groups receive free admission but only for self-guided visits.

The operating budget for the Yarmouth County Museum is about \$385,000, of which about 40% is from local and provincial government grants, 36% from the Society Foundation, 7% from an endowment to support operating costs, 4% from donations, and the remaining 13% from earned and miscellaneous sources. The financial support from the Town of Yarmouth is used to offset the property taxes paid by the Museum.

The Museum operates with 3 full-time staff and one part-timer, supported by 10 regular volunteers. Staffing costs account for 41% of operating expenses.

2.3.2 Firefighters Museum of Nova Scotia



The Firefighters Museum has a provincial mandate and is part of the Nova Scotia Museum system, enabling it to have access to provincial operating funds. Although it is currently closed for building maintenance, it is usually open year-round from 9 a.m. to 4 p.m. from Tuesday through Friday.

Visitors are provided with opportunities to see the types of fire engines used throughout Nova Scotia from the 1800s to the 1930s by means of photographs, stories and artifacts. These include antique toy fire engines, original uniforms and a substantial collection of shoulder crests, patches and badges from fire departments around the world. Hands-on opportunities include taking the wheel of a 1933 Chevrolet Bickle Pumper.

Admission charges are \$5.00 for adults, \$4.00 for seniors, and \$3.00 for children 6-17. There is a family rate of \$10 which includes parents and school-aged children. Children under 6 are free. A few thousand visitors per year are estimated to attend.

A limited staff is supported by volunteer retired firefighters, but the Sweeney Museum is not currently supported by retired fishers. This should change in the future.

2.3.3 Harbourfront Museum



The Harbourfront Museum is located along the Yarmouth Waterfront within the Killam Brothers building, which was built in 1838, and was where the Killam Brothers shipping business operated until 1991. The Harbourfront Museum was established as a relocation initiative of a registered charity known as the Friends of the Yarmouth Light. It is located on the second floor of the Killam Brothers building and includes several galleries that focus on Jewish and Lebanese families the immigrated to Yarmouth to start a better life. There are plans to extend this exhibit to include other immigrant stories. Other exhibits focus on how tourism has shaped Yarmouth's history and what Main Street Yarmouth was like in the past.

The 3-storey building was gifted to the Town of Yarmouth and is operated by the Yarmouth County Museum which receives grants when available for summer students through federal employment programs to operate the Harbourfront Museum on a seasonal basis. The facility also serves as the welcome centre for cruise ship passengers when they come ashore. Admission is free to all, but donations are requested.

On the first floor there is a seasonal Yarmouth Peddlers' Gift Shop which sells largely souvenir items and products ranging from clothing to books and folk art, while the top floor is rented office space of the Southwest Nova Biosphere Region Association, a registered non-profit that focuses on conservation and restoration of the ecosystem of five southwestern Nova Scotia counties (Annapolis, Digby, Yarmouth, Shelburne and Queens). Each municipality is approached for funding, but the bulk of funding comes through the federal grants.

Annual attendance in the Killam is about 2,000 including those who attend events in the building.

2.3.4 Art Gallery of Nova Scotia – Yarmouth and Acadian Shores

For 18 years the Art Gallery of Nova Scotia (AGNS) operated a satellite facility in downtown Yarmouth. It operated on a year-round basis in a former bank building from 2006 to 2020 when it scaled back to be a seasonal operation from late May to mid-October. The Art Gallery included over 5,000 sq. ft. of exhibition space. The Gallery closed in the fall of 2024 due to financial constraints, but data while operational is still

useful for benchmarking purposes to help inform the recommendations and projections for the relocated Fisheries Museum.

The closed Yarmouth satellite of the AGNS included a Tourist Information Centre in its lobby, which is also an opportunity for the Fisheries Museum. Admission charges for the satellite art gallery were \$6.00 for adults, \$5.00 for seniors, \$3.50 for students and \$2.50 for youth (6-17). There was also a \$12.50 family rate. Free admission was available to children under 6, to adults supervising school groups, and to members, including reciprocal memberships with other Canadian art galleries.

The Gallery attracted about 2,000 visitors per year when the ferry was operational and only about 600 when there was no ferry service. It was operated by one full-time staff person and two seasonal part-timers on site. Most professional services were provided by the AGNS staff in Halifax. The operating budget of the Yarmouth Branch could therefore be limited to \$140,000 per year. There are currently no plans to reopen a satellite art gallery in Yarmouth.

2.3.5 Wedgeport Sport Tuna Fishing Museum



Some 20 minutes by car south of Yarmouth is Wedgeport, which is the home of a small museum and interpretive centre that features artifacts and photos dating from the 1930s to the 1970s when Wedgeport was promoted as the Sport Tuna Fishing Capital of the World. The Museum was opened in 1996 after the revival of the annual Wedgeport Tuna Tournament and Festival that takes place in mid to late August.

In addition to the celebration of the tournament and other fishing exhibits, the Museum offers exhibits on Acadian history and Wedgeport general history. The site also includes a nature trail and the building features a small gift shop and restaurant/tearoom. The Museum is open daily from 8 a.m. to 4:30 pm from mid-June through mid-October. Admission is \$5 per person with free admission for students and children.

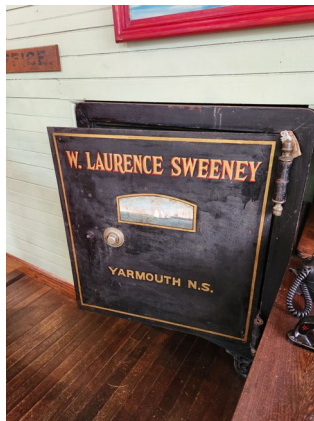
A few thousand visitors per year are estimated to attend the Museum primarily during the tuna tournament and festival. The Museum is operated by a seasonal Manager, supported by students and volunteers. It reports an annual operating budget of about \$145,000.

The data and interview feedback in this chapter help to inform our recommendations for the future Fisheries Museum in Yarmouth and the attendance and financial projections in Chapter 5 of this relocation feasibility study.

3. SWEENEY FISHERIES MUSEUM OPERATIONAL ASSESSMENT AND POTENTIAL MARKETS ANALYSIS

This chapter includes analysis of the visitor experience, facilities and operations, including existing markets, staffing and finances, of the Sweeney Fisheries Museum as well as potential resident, school and tourist markets for Yarmouth and area.

3.1 EXISTING SWEENEY FISHERIES MUSEUM OPERATIONAL ASSESSMENT



This section considers the strengths and weaknesses of the existing Sweeney Fisheries Museum and considerations for enhancements in advance of the relocation.

3.1.1 Visitor Experience Assessment

The central concept on which the existing Sweeney Fisheries Museum's permanent exhibition is based to replicate the feeling of a working waterfront in the mid-20th century, with the operations of the Sweeney company central to the interpretation. Originally visitors entered from a second-floor entrance on the south side of the building with an introduction to the Sweeney company via Laurence Sweeney's replicated office, but Scotia Garden Seafood's operational needs have since forced the Museum to change the entrance to the east (or Water St.) side, meaning that the first thing visitors see are replicated fish shacks that were common on wharves throughout Nova Scotia in the 20th century.

Circulation is non-directed in principle, which is to say that there is no set storyline and visitors can theoretically explore whichever experience they would like in any order they prefer, but practically the experience is semi-directed to the extent that visitors are forced between a series of themed recreated buildings upon entry, before exiting into a slightly more spacious exhibit area at which point they may move to the Sweeney office, the archives, a vessel mock-up and other displays in the order they wish.

The experience is immersive in nature, with the exhibition having a very high display density (artifacts per sq. ft.) especially within the recreated structures – in fact, virtually the entire collection is on display, which is unusual. Upon entry, visitors are invited to explore a number of waterfront fishery company functions via these structures, including a smoke house, a rigging shop/chandlery, a machine shop and a sail loft, among others. While the buildings themselves are recreated versions of those once common in Nova Scotia, the smaller objects within them are mostly authentic artifacts, many of which visitors are permitted to handle. While in most cases the artifacts are relatively robust, these are accessioned artifacts which should not be subject to handling by casual public visitors. Moreover, some are fragile and subject to damage. It is unsurprising given the very high display density and the maze-like visitor circulation that artifact theft has been an issue for the Museum in the past.

Typically, an immersive interpretive concept such as this will interpret a specific time and place. In this case the place is specific, but the time period is vague, with some items suggesting that visitors are experiencing the 1940s (the recreated shacks) and others (such as Sweeney's office) suggesting the 1960s or '70s. There are instances where some artifacts in some settings are anachronistic, which is to say that the room setting suggests one period of time, but an object is on display that is clearly from another time period and out of chronological place.

The replicated Sweeney office also includes numerous authentic objects that were used by Laurence Sweeney and again, visitors may handle many of these, which is problematic given their accessioned status as well as their authenticity, significance and

in some cases, fragility. While the Museum prides itself on such opportunities for interactivity, recommendations in Chapter 4 include other ways to achieve this goal without having to sacrifice the integrity of museum collections.

Perhaps the highlight of the experience is a replica Sweeney freighter which visitors may board and explore. Like most other exhibit elements, the vessel itself is replicated and an exhibition prop, but one that contains authentic artifacts within it. As might be expected, some interviewees noted the popularity of this exhibit with children, although there are safety concerns given steep ladders, high decks and narrow passageways. And, from an interpretative point of view, the choice of replicating a transport vessel as opposed to a fishing vessel might seem incongruous, except insofar that the original concept was intended to communicate the breadth of Sweeney business activities. The “Homer” character which comprises an interactive children’s activity is also reported to be quite popular.

Additional key points, with directions for the future visitor experience, include the following:

- There is no orientation experience at present, except as provided by a graphic panel and verbal interpretation by staff. ***The future museum’s permanent exhibition should include such an orientation experience***, which may range from a text and graphic panel to a more fulsome orientation gallery or theatre, depending on audience needs, future exhibition design and available budgets.
- The themes and storyline, as well as the key communication messages, are unclear, although this is mitigated by staff who provide verbal interpretation when they are available to do so. A guided tour is required for visitors to get a full understanding of the story at present, which further bolsters the case for an improved orientation experience along with a renewed concept and interpretive plan.
- The Museum is best described as immersive rather than interactive, with interactivity confined to artifact handling, the transport vessel experience and the children’s scavenger hunt activity. ***Opportunities to enhance interactivity without relying on authentic objects are recommended in the future Fisheries Museum.***
- Allowing visitors to handle accessioned artifacts is problematic from a best practice point of view, but there is a method by which the Museum may allow for this in the future, if so desired. In its new location the Fisheries Museum should deaccession some duplicate, robust and easily obtained objects, which removes the commitment for indefinite preservation, and place them in a study collection. Study collections are not intended for permanent preservation but are intended for handling by casual visitors or school groups. This is the only acceptable way in which authentic objects may be handled by visitors.
- Because the exhibition is currently conceived as an immersive experience, opportunities to interpret outstanding artifacts are only minimally realized. For example, the impressive L. Sykes painting of the Sweeney property is not interpreted

at all, but which offers an excellent opportunity to introduce Yarmouth and its waterfront during Sweeney's heyday and provides an engaging vehicle for doing so. A more up-to-date contextualization of key or "star" artifacts is recommended, rather than the current approach which tends to treat each artifact as being equal in significance when this is not actually the case.

- Part of the existing exhibition space is taken up by a small archive area. This is fine and in fact commendable in the context of the existing museum, since there are no other available spaces that provide visitors with access to these materials, but in the future Fisheries Museum a dedicated area should be set aside for this function to allow exhibition spaces to function fully as such.
- There is no temporary exhibition gallery present, and because virtually all collections are on display, no reserve of objects from which to draw in order to create such in-house temporary shows (although the Museum could, in theory, rent relevant temporary exhibitions from the open market if it had space and budget to do so). Since changing content is crucial for attracting repeat visitors, the Museum should consider creating a small temporary exhibition gallery in the new location.
- Near the vessel mock-up is a sign that says, "this is a museum and not a play area". While this is intended to enhance visitor (and especially child) safety, it transmits an outdated message to visitors and may be especially constraining or off-putting for families with children. A more visitor-centric approach should be built into the new exhibitions at Mariners on Main to enable the Fisheries Museum to avoid the need for messaging of this kind, in particular a dedicated children's area that focuses on learning through play.

Overall, this is an exhibit of its time, originally installed in about 1991 utilizing museology common in the 1970s and 1980s. Permanent exhibitions should generally be changed every 15 to 20 years to reflect changes in museology, shifting audience preferences and advances in scholarship. While it is therefore overdue for replacement, some elements may be relocated to the new location both to save on future exhibition costs and to take advantage of those elements that are already popular within a revamped and updated concept.

3.1.2 Existing Site and Facility Assessment

The W. Laurence Sweeney Fisheries Museum is located on the Yarmouth waterfront in a rented second-floor space at 112 Water Street, within the Scotia Garden Seafood company office. The Museum occupies approximately 4,166 gross square feet, primarily dedicated to exhibitions but taking into account archival, storage and ticketing spaces there is a maximum of 3,500 sq. ft. of exhibition space.

While the waterfront location aligns well with the museum's maritime and fisheries focus, the building presents significant challenges, including limited visibility, accessibility concerns, and inadequate environmental controls, including a lack of air conditioning in the summer months. There are also no public washrooms and other visitor experience concerns, including those set out above.

3.1.3 Existing Markets and Operations Assessment

Given the site, facility and visitor experience limitations discussed above, the Sweeney Fisheries Museum attracted 1,943 visitors in 2024 with estimates for about 2,000 visitors per year in subsequent years. Guest book signatures indicate that 65% are from outside Nova Scotia, but the reality is that people from farther afield are most likely to put their names in a guest book. Nonetheless, since the content of the Sweeney Museum has not changed significantly over the years, local and regional residents who had previously attended would commonly see no reason for repeat visits. About 25% of visitors are estimated to be repeat and that estimate is likely high.

The low attendance also reflects a seasonal operation from late May to mid-October, which is appropriate given the experience of other museums discussed in the previous chapter and the schedule of the ferry service. Admission charges are \$7.00 for adults and \$5.00 for seniors and students, with free admission to children under six. School groups are offered free admission but are encouraged to donate. About half of all visitors receive free admission.

The market skews male and older, which is common, and relatively few children attend. It will be important for the visitor experience at the relocated and enhanced Fisheries Museum to increase the level of appeal to women, younger adults and children if attendance levels are to be maximized. Similarly, the average length of stay will need to increase above the 30-45-minute range if higher admission prices can be introduced in the new facility and to help increase the value of repeat visitation and the potential for a membership program.

The existing Sweeney Museum is operated by two full-time seasonal staff and one part-timer and there was no volunteer assistance during its operating season in 2024. With many retired fishers there should be opportunities for introduction of a volunteer program, especially in the context of the new Fisheries Museum.

Excluding an allocation for relocation costs, the 2024 operating budget of the existing Sweeney Fisheries Museum was only \$35,742, of which \$29,967 was staffing costs. Staffing and other operating costs will need to increase substantially in the new Fisheries Museum and will certainly exceed the additional earned income that will be possible, requiring increased private and governmental support. In 2024 earned income from admissions was \$5,678, with \$415 from private supporters and the remainder from the Town of Yarmouth.

3.2 ANALYSIS OF POTENTIAL MARKETS

This section considers available data and interview feedback associated with resident, school and tourist markets for Yarmouth and the relocated Fisheries Museum in particular.

3.2.1 Resident Markets

In general, the resident market is important for all museums and related institutions for the following main reasons:

- The resident market is readily accessible and available on a year-round basis.
- Residents can be made aware of the future Fisheries Museum and its exhibitions and programs more easily and cost-effectively than tourists.
- Residents are most likely to be repeat visitors, assuming changing content is available.
- Residents are most likely to become volunteers, members and donors.
- Residents often advise and accompany visiting friends and relatives to area attractions.

The following analysis is based on available data, the interview process, and the judgment and experience of Lord Cultural Resources.

Population Size and Projections

The table below sets out population totals and projections for the Town and County of Yarmouth compared to provincial and national averages. **The data indicate a relatively modest resident population base and emphasize the importance of repeat visitation and attracting tourists.** But what must be taken into account when considering potential attendance is the challenge of a much larger and provincially funded fisheries museum in Lunenburg, which is closer to the Halifax area and its larger population base, its airport and its larger tourist market.

Population Totals and Projections	Actual 2016	Actual 2021	Projected 2048	% Change Actual 2016/2021	% Change Projected 2021/2048
Town of Yarmouth	6,518	6,829	N/A	4.8%	N/A
Yarmouth County	24,419	24,927	N/A	2.1%	N/A
Nova Scotia	923,958	969,383	1,246,000	4.9%	25.8%
Canada	35,151,728	36,991,981	49,400,000	5.2%	28.8%

Sources: Statistics Canada, 2016 and 2021 Census, Population Projections for Canada, Provinces and Territories (2021 to 2043)

Age

The Yarmouth Town and County populations are substantially older than the provincial and especially the national average. But it is younger people, whether in families or in school groups, that will need to be attracted in far greater numbers to the future Fisheries Museum than they are now to the Sweeney Museum.

The continued aging of the population over the next decade is positive for a museum that will tend to appeal to older market segments if its focus is on history. However, **the relocated and expanded future Fisheries Museum will need to attract a higher percentage of younger visitors, including more children and youth who will expect more interactive and immersive experiences than is currently the case.**

Age Comparisons, 2021	Town of Yarmouth	Yarmouth County	Nova Scotia	Canada
0-14	14.8%	13.6%	14.1%	16.3%
15-64	58.1%	60.1%	63.7%	64.8%
65 and older	27.1%	26.4%	22.2%	19.0%
Median Age	48.8	50.4	45.6	41.6

Source: Statistics Canada: 2021

Education and Income

Level of education is the variable with the closest correlation to museum and other cultural attendance and participation, as supported by numerous studies. The higher the level of educational attainment the more likely that a person will attend or participate. Like education, income is also an important indicator of potential museum attendance but is not as significant an indicator as education. That is, high-education, low-income persons are more likely to attend than are persons of high income and lower levels of educational attainment.

The table below indicates that the **educational attainment** level, and in particular the percentage with a university degree, is substantially lower for the Town and County of Yarmouth than the provincial and national averages. This is a weakness that may be mitigated by being enhancing the entertainment value of the relocated Fisheries Museum.

Of note as well on the following table is the substantial percentage of the Yarmouth County population that is working in the fisheries, forest, agriculture or hunting industries, many of which would be in the fishing industry.

Population 15 Years or Over	Town of Yarmouth	Yarmouth County	Nova Scotia	Canada
Bachelor's Degree or Higher	17.7%	15.7%	29.8%	26.7%
Related Employment	Town of Yarmouth	Yarmouth County	Nova Scotia	Canada
Agriculture, Forestry, Fishing or Hunting	4.4%	13.1%	3.7%	2.3%

Source: Statistics Canada, National Household Survey 2021

Family income levels for the County and especially the City of Yarmouth are substantially lower than the provincial and especially the national average. The income factor raises issues about admission charges if attendance levels. ***This study has recommended the need for admission charges appropriate to the size and quality of the future Fisheries Museum and especially the visitor experience offered, but offering opportunities for sponsored free admission for those who need it.*** Our recommendation is set out in Chapter 4.

Family Income	Town of Yarmouth	Yarmouth County	Nova Scotia	Canada
Median Family Income- all census families, 2020	\$68,000	\$81,000	\$91,000	\$105,000

Source: Statistics Canada: 2021 Census

Gender

Women account for only a slightly higher percentage of the population but are generally a more important market for most museum types than are men. However, fisheries museums are usually among the male-oriented exceptions, although the Fisheries Museum of the Atlantic in Lunenburg estimates a higher percentage of women. The main reasons why women are generally a more important market than men for museums are as follows:

- Women tend to make the decisions in a household regarding the educational experiences for their children. Therefore, the greater the perceived educational benefits of museums, the more likely they will be selected.
- Women account for a large majority of teachers, who usually make the decisions regarding school field-trip destinations.
- Women tend to make the decisions regarding attractions to visit on family vacations and account for a large majority of tour group passengers and trip planners.

Of particular importance to women are issues of personal safety. Access from parking and the perceived safety of a site are both important factors to potential attendance by women and those they influence. The assumed future site of the Fisheries Museum on Main Street in downtown Yarmouth is therefore positive.

Ethnicity and Language

Canada is becoming an increasingly multicultural nation, and all cultural institutions need to plan to reflect the interests of a variety of visible minority and other groups, whether in the context of exhibitions, programs, marketing or staffing considerations.

In considering the issue of visible minorities, there are far fewer in the Town and County of Yarmouth than the national average, but the percentages should continue to increase in the future. More important is the substantially higher percentage of Town and County residents who are of Indigenous descent or have a knowledge of French. This suggests that the emerging themes for the permanent exhibition consider fisheries from a wider variety of perspectives – not only from the English and New England settler perspectives, but also from Acadian and Mi'maq points of view, among others as appropriate.

Selectited Ethnicity and Language Characteristics	Town of Yarmouth	Yarmouth County	Nova Scotia	Canada
Visible minority	8.5%	3.6%	9.8%	26.5%
Indigeous Identity	14.4%	18.8%	5.5%	5.0%
Knowledge of French	15.5%	29.4%	10.4%	29.1%

Source: Statistics Canada: 2021 Census

3.2.2 School Markets

It is important for all museums to offer programming of particular interest to the schools for the following main reasons:

- Education is part of the mission and mandate of all museums that seek opportunities to broaden and deepen participation from school groups.
- Children brought to museums as part of school field trips often convince their parents to take them again.
- For children in lower income/education families, attending on a field trip is often the only opportunity to attend.

The key determinants for schools to attend on field trips are the size of the student population within a convenient distance, relationship to curriculum, student enjoyment, proximity and cost, as discussed here.

Enrolment Levels

While school groups may attend from a wider area, they are most likely to be from the nearby Tri-County School District that includes Yarmouth because of time and cost factors. Enrolment levels mirror the population and are thus relatively modest in the Tri-County School District as set out below.

It is in the elementary grades that most field trips take place because the students are generally with one teacher.

Regional School Distric Enrolment 2024/25	Tri-County (Yarmouth, Shelburne, Digby)	Nova Scotia
Elementary (K-6)	3,239	72,092
Junior (7-9)	1,314	29,542
Senior (10-12)	1,589	31,897
Total	6,142	133,531

Source: Nova Scotia Education and Early Childhood Development, 2025

Curriculum Links

Schools in the Tri-County School District follow the provincial curriculum in which outdated categories like local history have long been superseded. The focus now is on global competencies including critical thinking and problem-solving, innovation, creativity and entrepreneurship, self-directed learning, collaboration, communication and citizenship, with the various subject areas as vehicles toward these learning goals.

What follows is a review of potential curriculum links for specific subject matters that may be included in the relocated Fisheries Museum's school programming:

Social Studies Curriculum

The Nova Scotia Social Studies curriculum includes the following key focus areas for grades 4, 5, 7 and 8, which are within the grade 4-8 range that are most likely to visit museums on field trips (a review of the Grade 3 and 6 curricula yielded particularly weak linkages and has not been included here). What follows is not a recitation of the complete grade curricula, but rather only those areas for which linkages to the future Fisheries Museum may be applied:

- Grade 4 - significance of place and interactions between humans and the environment
- Grade 5 – investigating past societies, including ancient and pre-contact Canada
- Grade 7 – history of communities with a focus on the 1820-1920 period, including economics (how natural resources, land and other commodities were distributed, how people chose to use resources and who controlled resources.
- Grade 8 – history of Canada with a focus on the 1920-1999 period, including economics along the lines of the Grade 7 curriculum.

The strongest links are those relating to Indigenous relations to natural resources as well as Grade 7 and 8's examination of community history which includes economics, although in most cases the links are quite indirect. Unfortunately, Grade 7 and 8 students are less likely to visit museums on field trips than those in the younger grades.

Science Curriculum

The science curriculum would appear to yield stronger linkages, except for Grade 3 which focuses on subjects such as soil that are not particularly relevant to the Fisheries Museum. These include:

- Grade 2 – interconnection between air and water (including the Mi'Maq perspective) as well as animal growth and the environment
- Grade 4 – investigation of a variety of local habitats, as well as interconnectedness within habitats (again including the Mi'Maq perspective)
- Grade 5 – weather and how it impacts daily life, as well as simple and compound machines
- Grade 6 – diversity of life in nature and significant relationships within the natural world
- Grade 7 – environmental action and engineering structures
- Grade 8 – hydraulics and pneumatics.

High School

Other potential linkages appear at the high school level, although actual linkages are rather weak:

- Skilled Trades, Grades 10-12 (tends to focus on service and culinary sectors, automotive repair and manufacturing)
- Business Education, with one course a Grade 12 offering on business management and another Grade 12 course on entrepreneurship to which the Sweeney story might be an interesting case study
- Family Studies, in which a Grade 8 course considers Food and Nutrition.

One constant that runs through most subject areas in the curriculum is a strong focus on Indigenous ways of seeing and knowing. An interview with a local school district representative indicated that including Indigenous subject matter in the exhibition would be an essential point of connection with the curriculum in all respects.

In summary, the curriculum linkages are, at first glance, rather weak, with Indigenous studies the most fertile area for a museum seeking to attract school groups. That said, there is significant room for teacher interpretation within each of the general subject matter areas, provided that the inquiry-based and critical thinking core of the curriculum is respected, but it does mean that staff will need to make any curriculum linkages very clear to teachers, so they may understand how the Fisheries Museum can contribute to the mandated learning outcomes.

Field Trip Policies and Funding

Even before the impact of the COVID-19 pandemic, a common pattern throughout North America was a decline in the number of field trips for a variety of factors in large part because of transportation costs and time, insurance, and other largely financial reasons.

In the Yarmouth area, the cost of busing is one major reason for this situation, but it does appear that the types of museums available are also strong determinants of field trip choice. With the social studies curriculum heavily focused on cultures and relationships between cultures, destinations such as the Black Loyalist Centre at Birchtown and the Acadian Village in Pubnico are among the most popular. By contrast, museums in town, such as the Firefighters' Museum or the Yarmouth County Museum, are less patronized by school groups.

Regarding funding, there is no set formula for this but there is usually some money availability under the general umbrella of equity that can be made available. The focus on equity further explains the popularity of sites like the Black Loyalist Centre for school groups and again argues for a broad, "multiple perspectives" approach to the subject matter.

3.2.3 Tourist Markets

Although some recent data are available, most are pre-COVID from 2019, as set out below, and partially useful but limited by the fact that the ferry between Maine and Yarmouth was not operational that year. The data and interview feedback indicate the relative weakness of Yarmouth as a tourism destination, but that implementation of a relocated, expanded and enhanced Fisheries Museum should help to strengthen the tourist appeal of Yarmouth somewhat.

Nova Scotia attracts about two million tourist visits per year in a combination of day trip and overnight visits. In 2019, the Yarmouth and Acadian Shores tourism region accounted for only 3% of the tourists to Nova Scotia who stayed at least one night, which is the lowest percentage of the six tourism regions. For pleasure visitors it increased to 4% but dropped to 2% for visiting friends and relatives, reflecting the relatively small population in the region. Within the Yarmouth and Acadian Shores region, about 84% of overnight visitors included Yarmouth on their trip. Day trip visits to Yarmouth are limited by the distance from the larger Halifax population area, which is about 3.5 hours away by car. These tourism figures were negatively impacted by the fact that the Maine to Yarmouth ferry was not operational that year.

The main purpose of trips to the Yarmouth and Acadian Shores tourism region among those who stayed overnight or stopped for at least 30 minutes was pleasure travel, followed by visiting friends and relatives, and lastly business. The Acadian Shores are generally a more substantial overnight tourism draw than Yarmouth itself, suggesting the importance of packaged offerings and prices on a periodic basis. The Historic Acadian Village in Pubnico is about 40 minutes away by car. The data indicate that a higher percentage of the overnight visitors were from Quebec than from elsewhere in Atlantic Canada, likely focused on the Acadian communities. Nearby New England represents the largest source of American visitors, who arrive primarily by ferry from Bar Harbor.

The Yarmouth and Acadian Shores Tourism Association (YASTA) promotes tourism activities within the Yarmouth & Acadian Shores region of Nova Scotia. “YASTA is a partnership between the Municipality of Yarmouth, Town of Yarmouth, and the Municipality of Argyle, helping to promote visitation to the region and develop tourism experiences that will keep visitors in the region longer”.

Among the tourism strengths that are marketed by YASTA are Acadian and Indigenous culture, the ferry linking Yarmouth to Bar Harbor, Maine¹, fall colours, beaches, and being known as a seafaring area, which is positive for the future Fisheries Museum.

Weaknesses include being 3.5 hours from the Halifax Stanfield International Airport, relatively few visiting friends and relatives because of a small population base, and limited things to do, especially for children. As set out in Chapter 4, this study has emphasized the need for the relocated Fisheries Museum to help provide interactive opportunities for children.

Potential tourist market segments for the future Fisheries Museum are as follows:

¹ There is no direct ferry service from or to New Brunswick. The ferry service is from Digby Nova Scotia, some 70 minutes by car from Yarmouth to Saint John New Brunswick.

- **Bar Harbor, Maine Ferry Passengers:** Yarmouth is a gateway for the American market to Nova Scotia as long as there is a ferry service linking it to Bar Harbor Maine. The ferry service was closed in 2009 and reopened in 2014. The ferry operates seasonally for six months per year from May 15 to October 15. In 2024, the ferry transported 48,804 passengers and 19,711 vehicles. Although visitors using the ferry spent over \$20 million in the province, staying an average of 8.2 nights, there has been uncertainty regarding the long-term availability of the ferry service. The provincial financial support for the ferry has been extended through 2026 but uncertainty is reported to have had a negative impact on investor confidence in the tourism infrastructure of Yarmouth. ***Ferry passengers often simply pass through Yarmouth on their way to other places in Nova Scotia or elsewhere, but a high-quality Fisheries Museum should increase the likelihood that more tourists will spend time in Yarmouth, particularly if the lobby of the Museum includes a Tourist Information Centre, as recommended in Chapter 4 of this report.***
- **Visiting Friends and Relatives:** This is commonly the primary reason why tourists are in an area but that is not the case in the Yarmouth area because of its relatively small population base. However, there is a substantial number of people working in the fishing industry or those who previously worked in the industry whose visitors should have a higher-than-average likelihood of attending a fisheries museum.
- **Hotel and Conference Guests:** There are nine hotels or motels in Yarmouth. The largest is the 132-room Rodd Grand Yarmouth, which is located on Main Street close to the assumed Mariners on Main site for the relocated Fisheries Museum. It includes a conference centre, making the Fisheries Museum a convenient potential site for off-site banquets in a unique setting. Data for the entire region in 2024 indicates over 82,000 room nights sold in the region, an increase of 5% over the previous year.
- **Cruise Passengers:** The Yarmouth harbour is not deep enough to allow larger cruise ships to dock. This requires ships to incur additional tendering costs. There have been only two or three cruise ship visits per year to Yarmouth as part of “New England and Canada” itineraries from Boston or New York City. These itineraries generally run from August through October, but some operate in the spring as well. Interviews suggest there may be an opportunity for growth in cruise ship visits to Yarmouth to reach about 10 per year. The implementation of an expanded and enhanced Fisheries Museum should help to increase the likelihood of such growth by offering a unique visitor experience that reflects the history and culture of the area.
- **Sports Tourists:** This is currently weak market but should improve with the implementation of the Mariners Centre expansion to include a 25-metre, six-lane pool appropriate for many competitions. There is also an opportunity for the relocated, expanded and enhanced Fisheries Museum to provide another thing to do for those attending hockey, soccer, baseball, gymnastics and other tournaments and who have time between games. This will require a more interactive, contemporary visitor experience than currently exists at the Sweeney Fisheries Museum.

The foregoing analyses of the existing facilities, markets, operations and finances of the Sweeney Fisheries Museum and potential resident, school and tourist markets for Yarmouth, along with the contextual and comparables analyses in the previous chapter, help to inform the recommendations in the following chapter, and the financial projections in Chapter 5 of this feasibility study.

4. RECOMMENDATIONS AND ASSUMPTIONS

This chapter sets out recommendations and assumptions associated with the relocated, expanded and enhanced Fisheries Museum. The recommendations/assumptions were based on the site tours, the workshop and interview process, as well as comparables and market analyses, and the judgment and experience of the consultant team. The recommendations and assumptions begin with a series of planning principles that serve to underlie those that follow, and are organized in the following categories:

- Core Planning Directions
- Visitor Experience Concept
- Proposed Site
- Proposed Space and Facilities
- Operations
- Other Assumptions

4.1 CORE PLANNING DIRECTIONS

The following core planning directions provide the basis for the overall vision and approach for revitalizing the Fisheries Museum. It provides a framework for enhancing the museum's visitor experience, operational efficiency, and long-term sustainability in the context of the relocation to 275 Main Street.

- **A Yarmouth Fisheries Museum Rather than a Sweeney Fisheries Museum:** To help increase potential attendance and revenue levels, both earned and contributed, it is important that the existing Sweeney Museum not simply be relocated and expanded into a larger space. Rather, it should become a substantially enhanced Yarmouth Fisheries Museum that has a wider mission and mandate and compelling exhibits and enhanced public and educational programs that will appeal to more of the general public, including more women and children. The stories told should be about the fishery and the fishing industry, as well as the important story of W. Laurence Sweeney and his company in a special Sweeney Industries Gallery. A

brand/name change from the Sweeney to the Yarmouth Fisheries Museum is recommended as further discussed in Section 4.6.

- **Allocation of Space within 275 Main Street to the Fisheries Museum that Recognizes Both the Needs to the Museum and Wider Community Needs:** The Mariners on Main building is about 37,000 sq. ft. on three levels (including the basement and Level 2) and is larger than needed by the future Fisheries Museum. Although there are large, high-ceilinged and large volume open spaces at the rear of the building currently functioning as a gymnasium, fitness centre and basketball court (which may be suitable for museum exhibition spaces), it is not necessary or desirable to utilize those spaces for the Fisheries Museum. Rather, using the front portions of the building facing Main Street would be helpful to encourage crossover with retail, restaurant and other businesses, thereby contributing to downtown revitalization. Using the front of the building also offers visibility and access for hotel and conference centre users. While it may be possible for some recreational needs of Yarmouth residents to continue to be met in 275 Main Street, this Fisheries Museum Relocation Feasibility Study does not seek to identify what the non-museum uses in the rest of the building will be. The space is simply described as Non-Museum Uses, but that an objective for the building is that it remain a community hub if possible.
- **Non-Museum Spaces in 275 Main Street Should be for Community and Not Commercial Uses:** Whether continued recreational or other community uses, it is Town policy to avoid competing for space and facility rentals with private sector property owners. Accordingly, it is assumed that no spaces in 275 Main Street will be leased for medical centre, office, retail or restaurant purposes. Similarly, a restaurant or café is not recommended in the Museum. In that context, admission to the Museum is recommended to be a full day pass to encourage visitors to eat and shop downtown and return to the Museum if they choose. Food service should be limited to grab and go items within the Fisheries Museum retail store.
- **Consideration of a Small Tourist Information Kiosk Within the Museum Lobby:** Yarmouth is the gateway to Nova Scotia for those arriving from Bar Harbor, Maine by ferry. In addition, there are other tourists arriving by automobile or who are staying in The Rodd Grand Yarmouth and other downtown hotels or using the Rodd Convention Centre who are seeking information about things to do in southwestern Nova Scotia. A Tourism Information Kiosk in the heart of downtown Yarmouth and incorporated into the Fisheries Museum lobby would expose those seeking tourist information to the Museum, while Museum visitors would learn about other things to do in the region and Province. It would also be mutually beneficial if there was an orientation experience shared between the Fisheries Museum and the Tourist Information function that could allow for alternating and scheduled films, lectures and other programs depending on the type of experience developed in the exhibition design process. ***Given the financial support for the Museum by the Town of Yarmouth it is assumed that no rent will be payable for the Tourist Information Kiosk within the Museum.***
- **An Interpretive Focus on Multiple Perspectives and Multiple Disciplines:** School group field trips (and for that matter, general visitation) are more likely if there are linkages to the various cultures that make up the region, particularly Indigenous cultures. Providing multiple perspectives on the fishery is therefore crucial. In

addition, natural history and STEM (science, technology, engineering and mathematics) education should be included in the interpretation, along with the current community, economic/business and labour history focus. Similarly, families with younger children are seeking hands-on interactive opportunities which are often science or natural history related. For young children, a children's exhibition gallery space that would also include birthday party opportunities is recommended.

- **Recognition of the Need to Enhance the Sweeney Fisheries Museum Operation in Advance of the Relocation:** It will likely take 2-3 years before the Fisheries Museum is operational at 275 Main Street. This considers the time to complete the expansion of the Mariners Centre and the time to develop exhibits and other relocation needs of the future Fisheries Museum. In the meantime, there are enhancements to the existing Sweeney Museum operation that could be considered to help increase attendance and earned income levels. These include enhancing orientation (perhaps via a new and well-positioned text and graphics panel or a newly-developed printed guide to the exhibitions that visitors could pick up on entry), improving the first floor elevator lobby area and stairwell (perhaps via fisheries or Sweeney-related photos along the walls on the stairs from the ground floor to the second floor of the museum), changing the order of the visitor experience to what was originally intended, or making space near the archives available for small meetings. This will require storage for foldable tables and chairs, potentially under the Sweeney office or Sail Loft.

4.2 VISITOR EXPERIENCE CONCEPT

The overall concept for the revitalized Sweeney Fisheries Museum is expressed in the core planning directions noted above. A broader focus on the fishery in southwestern Nova Scotia via multidisciplinary and multiple perspectives approaches are clearly important given the results of the research and consultation in this feasibility study. Visitor centricity should be built into the experience, which is to say that audience needs and preferences should be prioritized, and a variety of experiences appealing to local families and children as well as the older market segments that tend to comprise the tourist market should be included to broaden appeal.

Regarding the visitor experience concept, the permanent exhibition should include a number of key messages that should be introduced as part of the orientation experience, whatever form that may take, and reinforced throughout:

- The fishery has been an important part of the economic and cultural life of southwestern Nova Scotia since ancient times.
- The growth of Yarmouth as the region's County seat and largest town is largely due to the impact of the fishing industry.
- The fishery is a valuable natural resource that must be carefully managed and stewarded for future generations.

While a full interpretive plan will need to be developed as part of a future exhibition design process, in general the exhibition should be developed according to a number of additional principles:

A Story-Based Approach: The visitor experience in the new permanent exhibition should tell the story of the fishery in this part of the province. This is a dynamic rather than static approach. While events should be included, the personal stories of those involved in the fishery should be explored as well – W. Laurence Sweeney is an obvious example, but there would be many others, including ordinary fishers, community members, early settlers, contemporary individuals and more, that would give a sense of the broad range of people who were and continue to be involved in this vital industry. Personal stories are engaging and relatable for audiences and are commonly used in 21st century exhibitions.

Non-Directed Circulation: This is an element of the existing museum that should be retained. While all visitors should be oriented at the outset (which could occur via a variety of techniques that could range from an orientation gallery or theatre to a simpler and less expensive series of text and graphic panels), they should be invited to then choose exhibits in the order that is most appealing to them – which is one way that visitor centricity is manifested. This means that a directed, linear chronological path should be avoided.

A Thematic Approach: For non-directed circulation to work, the story of the fishery in southwestern Nova Scotia should be approached thematically. Although these will be determined in a future exhibition planning and design exercise, there are several key themes that may be considered, along with a series of related stories:

- **The Natural Resource:** Here there are natural links with the UNESCO Biosphere designation, and there is an opportunity to explore the foundations of the fishing industry, including the ocean environment and biomass, the resource base and topics such as fishery management and impacts of climate change. The Indigenous worldview with regard to the relationships between humans and the environment would be included alongside Western scientific understandings.
- **Tools and Techniques:** The focus here is on the “how” of the fishery, including technological change. Traditional Indigenous methods, changes in technology over time including potential future innovations, STEM learning via interactive displays and other approaches could be incorporated into this theme.
- **The Business of the Fishery:** This theme would include entrepreneurship and the economic organization of the industry. This would be an ideal theme to discuss the Sweeney story along with a number of others. The economic structure of the industry over time (“truck” system, corporatization, etc.) as well as the rise of Yarmouth as the commercial centre of the regional fishing industry would fit here as well.
- **The People of the Fishery:** While labour is the main theme here, it would also include fishing families and a survey of the wide range of individuals who make up the industry from a variety of cultures, including English and New England settlers, Acadians, Indigenous peoples and others. Social history would also be included.

Personal stories would run through all these thematic areas (which is to say that personal stories would be a connecting theme) as well as the multidisciplinary and multiple perspectives approaches. This could include the development of oral history videos.

Telling Stories Using a Variety of Means of Expression: The existing Sweeney Museum makes heavy use of a single means of expression, which is immersive recreated environments. The revitalized museum should include a variety of means of expression to broaden appeal and offer a variety of experience types. This has several implications:

- The museum has a significant collection, and artifact-based displays will continue to be an important means of expression but using a revised approach. The present display mode might be characterized as “mass display”, which is common to the type of immersive recreated environment technique which the existing Museum utilizes. In the revitalized museum, however, the objects should be used as storytelling vehicles that provide context to the stories being told. This means that artifact selection to focus on those that are most impactful and significant in telling any one particular story will be important in the exhibition development process.
- Other means of expression should also be used, potentially including film/video/multimedia, text and graphics, non-artifact interactive displays and immersive environments. If there is a children’s gallery, authentic collections should not be present in it at all.
- As noted above, the museum’s collection includes ample duplicates and commonly seen items that may be deaccessioned and assigned to a study collection. This would allow the exhibition to include artifact handling stations or “nooks” throughout the display area to allow visitors to handle objects without the risk of damaging rare, one-of-a-kind or highly significant objects. This could include development of a "working collection" from among duplicates that would not require the same level of preservation and handling avoidance.
- All of this means that the artifact display density will be significantly lower in the revitalized Fisheries Museum and that space for collection storage will be required. This is also beneficial for collection conservation (objects on display for very long periods of time may be subject to accelerated deterioration, depending on conditions) and it will also give the Museum the ability to refresh exhibits with other artifacts from time to time, as well as develop occasional in-house temporary exhibitions from the collections in storage. There could also be potential loan/co-curated exhibits from partnered museums.
- Finally, to fully realize the interpretation as described, some collection development may be needed. The collection is currently heavily concentrated in the mid-20th century era and mostly confined to objects owned and used by the Sweeney operation. If the concept is broadened to include the regional fishery in general, then the future museum may wish to expand its collection to include preserved specimens of marine life, for example, or solicit loans from partner organizations for such items illustrating Indigenous fishing techniques, modern equipment or other material as determined in the future exhibition content development phase.

4.3 STRENGTHS AND WEAKNESSES OF 275 MAIN SITE

The proposed site for the relocated Fisheries Museum is located at 275 Main Street, widely recognized as “Mariners on Main”. Below are the key strengths and weaknesses of the site itself, distinct from those associated with the building, which are addressed separately:



Strengths:

The site at 275 Main Street offers several advantages that support the museum’s relocation and expansion:

- Centrally located in a historically and civically significant area, reinforcing the museum’s role in preserving and celebrating local and regional heritage.
- A prime downtown Yarmouth location, offering proximity to retail, restaurants, commercial spaces, hotels, a conference center, and an art gallery. It is also relatively close to the Yarmouth Town Hall and the ferry terminal.
- High visibility and steady pedestrian traffic, ensuring strong community and visitor engagement.
- It is well-established as a recognized site for public services.
- Convenient access to ample surface parking (on site and street) and a nearby parking garage.
- Rear access for service vehicles, community residents, and museum visitors.
- Ample space for a future, dedicated loading area to support museum operations.

- Easily accessible by foot, bike, and public transit, enhancing walkability and connectivity.

Weaknesses:

While the site has many benefits, there are also challenges:

- The separation from the waterfront reduces the museum's direct connection to the working harbor, a key part of its theme and visitor experience.
- The loss of maritime ambience means the downtown setting may lack the sensory and visual elements—like the sight, sound, and smell of the ocean—that enhance authenticity.
- The limited opportunity for outdoor exhibits could make it more challenging to display large-scale artifacts, historic vessels, or interactive maritime experiences.
- Traffic and accessibility considerations may arise, as Main Street's activity could create logistical challenges for school groups, tour buses, and deliveries.

4.4. STRENGTHS AND WEAKNESSES OF 275 MAIN STREET BUILDING

The previous section examined the strengths and weaknesses of the site. This section focuses on the 275 Main Street building itself, assessing its advantages and challenges as the future home of the Fisheries Museum.



Strengths:

The building offers several advantages that support its potential as the new home for the Fisheries Museum. While some upgrades may be required, the building's size, configuration, and existing infrastructure provide a strong foundation for redevelopment. Key strengths include:

- A relatively modern building (built initially in 1967 as a centennial project as a swimming pool with subsequent expansion between 1985 and 1990) with no historic designation, allowing flexibility for exterior and interior modifications.

- Well-maintained overall, though roof repairs and HVAC upgrades may be needed to support museum collections.
- No known hazardous materials, such as asbestos.
- Ample space to accommodate the Fisheries Museum program while also supporting other community uses.
- High-ceiling spaces, including the former pool area, which can house larger historic recreations and is column-free for flexible exhibit installations.
- Dual access points, with a Main Street entrance and rear access from parking.
- Efficient layout that allows for a practical division between museum spaces and other community functions.

Weaknesses:

While the 275 Main Street building has many strengths, there are several challenges that need to be addressed. These include:

- Excessive size for a Fisheries Museum, requiring alternative uses to be found for the remaining space, though this presents an opportunity for other community uses.
- Uninspiring architectural style, which may make it difficult to create a welcoming atmosphere.
- Lack of windows along Main Street, contributing to an uninviting exterior, though this can be addressed through thoughtful architectural design and enhancements including a fisheries-related mural on the outside wall.
- Limited natural light in the interior spaces, and no direct views to the water may impact the visitor experience and perception of a fisheries museum.
- Boiler room location in the lower level (below the pool change rooms) creates significant heat and humidity challenges, limiting potential uses for that area.
- Interior finishes reflect the building's original design, which may need to be updated to align with the Fisheries Museum vision and functionality.
- Repurposing the pool space for museum uses will likely represent the largest capital expenditure, requiring extensive work to accommodate museum functions.

4.5 PROPOSED SPACES AND FACILITIES

This section begins with an overview of the strengths and weaknesses of the 275 Main Street building. It then outlines a pre-design assumption for the achievable capital cost range for the new Fisheries Museum. This assumption helps to guide general space and facility recommendations, as well as a detailed pre-design space and facilities program.

4.5.1 Facility Size

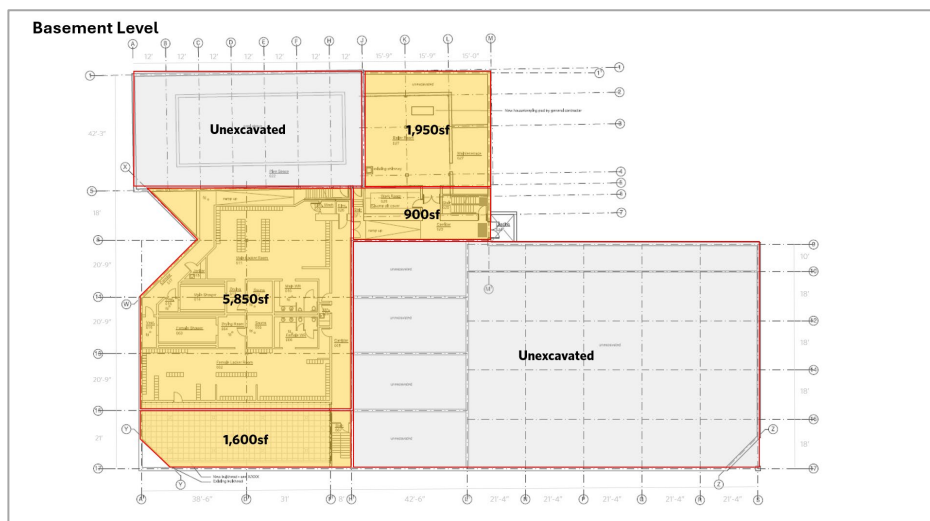
Lord Cultural Resources was provided with architectural floor plans for the existing building. Based on information taken from those drawings, an analysis of gross floor area was completed. The intent was not only to understand the total building size but

also to understand how much area was potentially available for the Fisheries Museum and how much could be reserved for other non-museum uses.

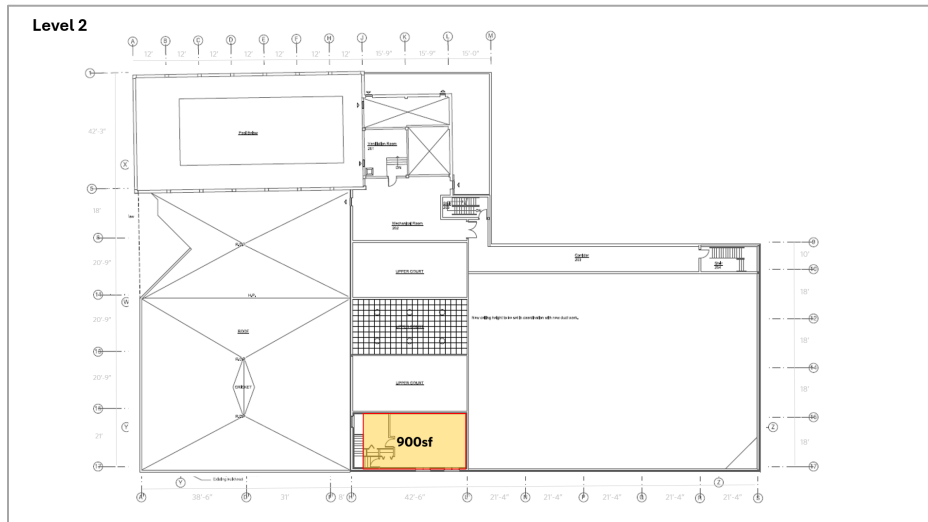
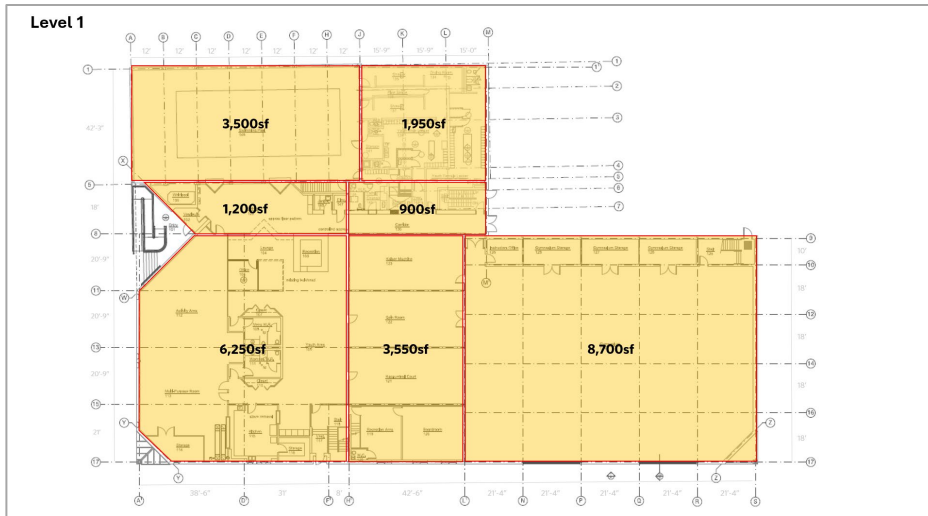
The following table summarizes our analysis. Areas are noted in square feet (sq. ft.) and have been rounded for simplicity. It indicates a total gross building area of approximately 10,300 sq. ft. in the basement; approximately 26,050 sq. ft. on the ground level 1; and approximately 900 sq. ft. on level 2, for a grand total of approximately 37,050 sq. ft.²

Space Use	Basement	Level 1	Level 2
Service / Mechanical	2,850		
Male / Female Lockers	5,850		
Dance Studio	1,600		
Pool		3,500	
Male / Female Lockers		1,950	
Lobby / Circulation		2,100	
Squash Courts (x4)		3,550	
Common Area		6,250	
Gymnasium		8,700	
Administrative			900
Sub-Total	10,300	26,050	900
Estimated Total Building Area	37,050 sq. ft.		

The following diagrams illustrate our analysis and are provided for reference purposes only.



² While Lord Cultural Resources has made every effort to be accurate in its analysis, it is noted that these dimensions and area take-offs have not been manually verified and therefore should be confirmed before proceeding with subsequent detailed design. The total 37,050 sq. ft. we calculated differs slightly from the information provided by the Client which indicates a "Reported Building Area" of 35,100 sq. ft.



4.5.2 Capital Cost Parameter

Early in the planning process, the pre-design assumption was that the capital costs for renovating spaces and developing new exhibits should range from \$10 to \$12 million. This cost range has helped to shape the space program and facility size recommendations that follow. In Chapter 5 and Appendix B of this report the Altus Group has prepared a Class D (magnitude, pre-design) capital cost estimate based on the recommendations and assumptions outlined in Phase 1 that take into account this capital cost parameter.

4.5.3 Museum Planning Assumptions/Recommendations

The following are museum planning assumptions and recommendations for the nature, size and location of the various spaces in the Fisheries Museum, recognizing that this Relocation Feasibility Study does not include architectural design.

- The focus of the relocated Fisheries Museum will be publicly accessible, permanent exhibition galleries and educational programming spaces to serve both museum and community needs. The program will also accommodate administrative, revenue generating, collections and archive storage and supporting exhibition preparation spaces.
- Given the assumed pre-design capital cost range, we have recommended the allocation of space to the Fisheries Museum be in the range of approximately 13,200 net sq. ft., which is close to triple the space in the existing Sweeney Museum. This size offers a balance of controlling capital and operating costs vs. offering the critical mass needed to attract first time visitors, generate earned income, and facilitate proper collections care along with archival storage / access. This total could vary in future detailed architectural design.
- The program includes a total of 6,900 sq. ft of exhibition space (including the 700 sq. ft. children's gallery) compared to the approximately 3,500 sq. ft. of exhibition space in the existing Sweeney Museum. The exhibition space recommendation is to utilize the existing pool and squash court areas for the exhibit functions due to their large column free layout and the high ceilings. It is acknowledged that the block walls between the squash courts are likely to be load bearing and therefore penetrations though these walls may be limited.
- To increase visitor engagement at the front entry, a larger reception area is provided. Visible immediately on entry, this function would include ticketing and visitor information, as well as an integrated gift shop with limited grab and go food and beverage sales, and a potential tourism information kiosk to be separately staffed.
- A small multipurpose room (for about 50 people) is assumed for scheduled films, lectures, and the public and educational programs of the Fisheries Museum. The plan recommends utilizing the existing 275 Main Street meeting rooms for this function to minimize construction and renovation costs. It is highly recommended however that the renovation plan includes new windows to be added along the building facade in this area to increase visibility and be more welcoming.
- No formal food or café functions are required given the downtown location. However, to service venue rental / events and select programs, a small catering kitchen is recommended. The program makes use of the existing 275 Main Street kitchen and storage areas but suggests an upgrade as part of the renovation strategy.
- It is understood there is a lack of proper collection storage, prep and archival storage space in the existing Sweeney Museum. To meet this need, the program includes an allocation of approximately 900 sq. ft. dedicated to this function. This space could operate as a combined collection storage and archival area.
- The program also makes an allocation of 700 sq. ft for dedicated work areas for museum staff. Taking advantage of the existing conditions, and to collocate these functions together, the plan utilizes the existing meeting rooms on the ground floor, and the staff spaces on Level 2. It is assumed that this space would include a Director's office, 1 or 2 open workstations as required, and a collaborative open working / meeting area for staff and volunteers. A staff lounge can also be included.
- The pre-design plan also maintains the existing washrooms in this area, although it acknowledges that some modifications may be required to accommodate the new floor plan layout and potential accessibility issues.

- The plan assumes that most visitors will use street parking for the museum. However, we recognize that the rear parking lot may also serve both the museum and the non-museum space (depending on the eventual user). To accommodate this, a secondary access to the museum is maintained via the rear doors. This entrance supports access from the parking lot but is expected to be used primarily for non-museum functions. If needed, access to the museum lobby from this entrance can be closed after hours to allow continued use of the non-museum uses of the remainder of the building.
- The plan also acknowledges that some amount of shipping and receiving will be required, both for the Museum and other users of space in the building. Given the site configuration, access from the existing parking area at the rear seems logical. It is therefore assumed that the existing male and female lockers on the ground floor could ultimately function as a shipping and receiving area shared by the Museum and other users of the building. This is also driven in part by the high temperature and humidity levels created by the boilers directly below, making other functions unlikely. It is also noted that the Museum will not require use of the entire space (since it will not focus substantially on bringing in external temporary exhibitions) and therefore a shared function (or only occupying a portion) is recommended.

Net And Gross Area

Overall facility size is based on the calculation of three primary inputs:

- **Net Programmable Area:** a calculation of the usable interior space required for museum functions or activities (represented as net sq. ft.).
- **Gross Building Area:** a calculation based on a multiplier of the net square footage (represented as gross sq. ft.) which considers horizontal and vertical circulation, mechanical and electrical spaces, washrooms and wall thicknesses.
- **Total Building Area:** The sum of net and gross areas.

As the space program does not prescribe the final design characteristics, an order of magnitude assumption of this ratio must be made. Normally, for planning purposes, a grossing factor of between 30% (1.30 x net sq. ft.) and 50% (1.5 x net sq. ft.) is common for new construction. However, in this situation, there is no new construction. The space is also quite compact and will include a large amount of exhibition space and other larger single areas, as well as several existing items (stairs, washrooms etc.) which are not changing. The grossing factor will therefore be much lower. For this project, a grossing factor of only 12% has been assumed, which will need to be confirmed as part of detailed architectural design.³

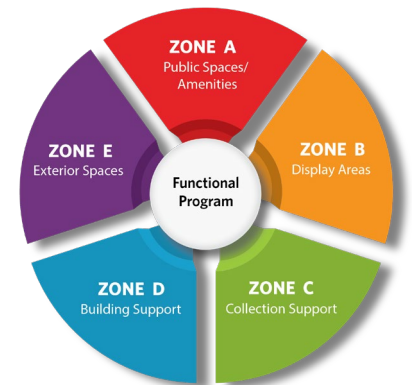
Museum Zoning

A separate notation for each specific museum zone is provided in the space program. Collections-focused museum spaces can typically be organized according to a

³ This figure was also derived in part from a comparison of the total gross area assumed for museum use (approximately 14,800 gross sq. ft., including an amount of shared space for service and loading), and the net allocation listed in the space program (13,200 net sq. ft), which yielded a 12% net to gross increase.

classification of zones, which groups the area in terms of public vs. non-public functions, and collections vs. non-collections functions. The five zones are as follows:

- Zone A, Public Amenities:** In this zone, visitors are present, but normally, collections items are not. This space is among the most expensive to build due to the high level of finish, but it is less expensive to operate, since it does not have tight temperature and humidity requirements.
- Zone B, Galleries and Exhibits:** Here, visitors encounter exhibitions or collections, as well as any art works borrowed from other institutions. It is the costliest part of the building (capital and operating), since it requires high levels of finish to meet public expectations, environmental controls, and security.
- Zone C, Collection Support:** Collections, loaned objects, collections handling and support areas are present in this zone. Access is typically restricted to authorized curatorial staff. These areas require a basic level of finish, but are more expensive to operate, since the space requires tight temperature and humidity controls.
- Zone D, Building Support:** This zone includes areas that do not normally host the public or require specific environmental controls, such as offices and building support. It is frequently the lowest cost to construct, since it requires neither an elevated level of environmental control and security, nor the level of finish necessary to meet public expectations.
- Zone E, Exterior:** This zone addresses any spaces or activities that are external to the physical building. No net area is assigned to these spaces although they are noted (where necessary) as they contribute to the overall functional requirements.



Zoning is important because it allows design teams to understand the functional and environmental requirements for each space in the program. It is not a specification, but rather an indication of likely user and function.

4.5.4 Preliminary Space Program And Plan

The following preliminary space program is organized in tabular format describing the total net area for all required spaces for the museum only. It also provides a preliminary listing of non-museum spaces, for reference. Any additional future uses, or potential shared spaces within the building, and their specific size should be confirmed during the design process.

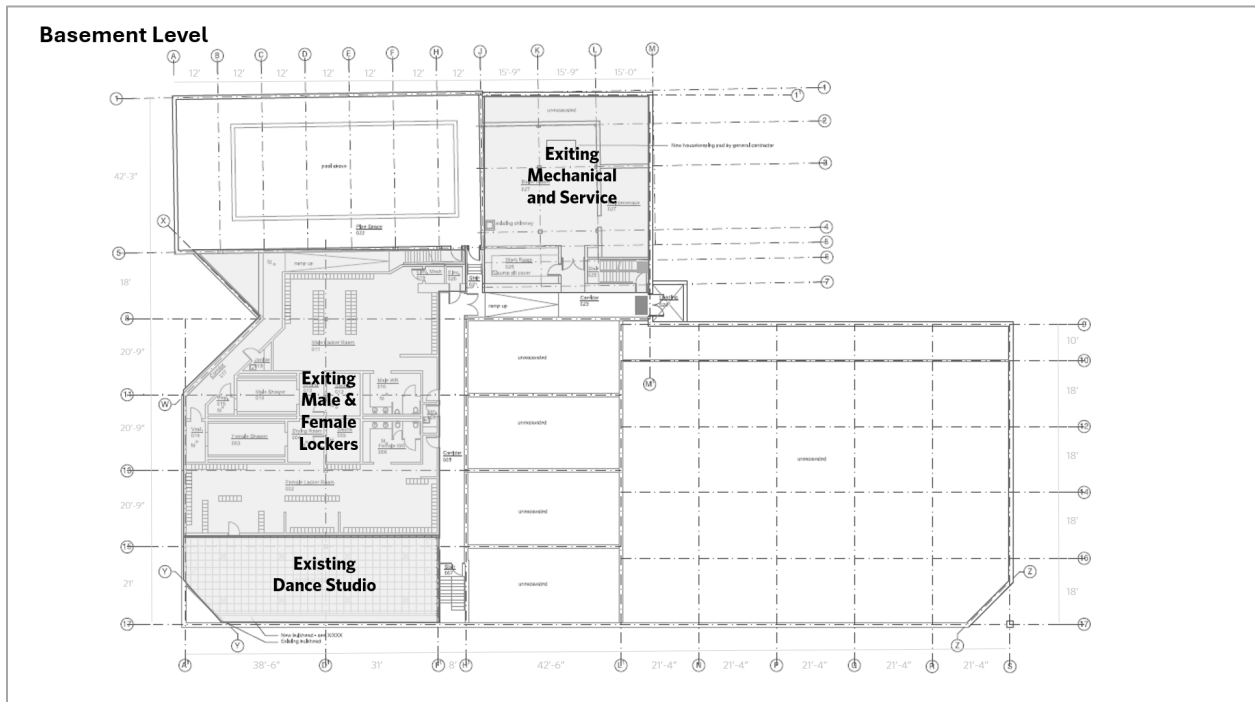
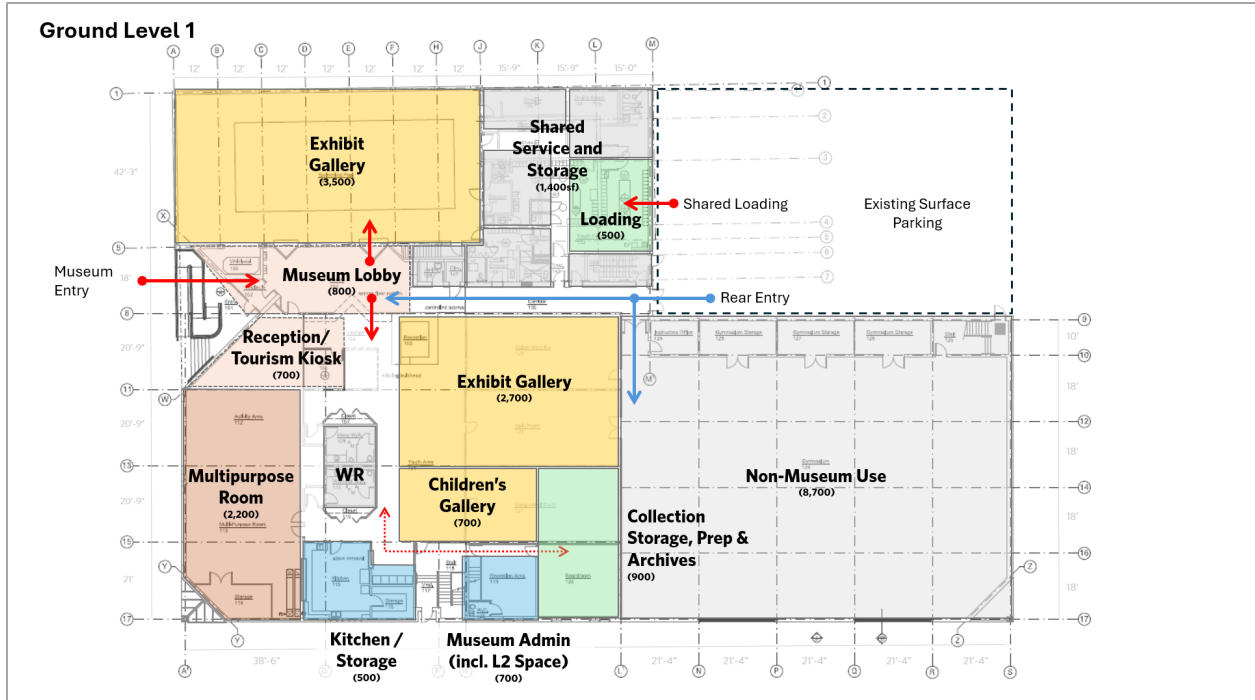
The program recommends a net area of 13,200 net useable sq. ft. When considering the estimated 12% grossing factor, the total museum area, at this pre-design stage, is a rounded 14,800 gross square feet. The table below summarizes the specific recommended spaces and their net size.

Zone	Level	Function	Museum	Other/Shared	Notes
A	1	Museum Lobby	800		May include visitor interpretive content
A	1	Reception / Tourism Information Kiosk	700		Ticketing, information, retail, light food fare
A	1	Multipurpose Room (incl. Storage)	2,200		Capacity 50-60 persons
B	1	Exhibit Gallery #1	3,500		Environmental controls required
B	1	Exhibit Gallery #2	2,700		Environmental controls required
B	1	Children's Gallery	700		Environmental controls not required
C	1	Collection Storage, Prep and Archives	900		Environmental controls required
D	1&2	Museum Admin (incl. Level 2 @ 400sf)	700		Assume 1 office, 1 workstation, 1 staff lounge
D	1	Kitchen / Storage	500		Existing space to remain
D	1	Loading / Shipping / Receiving	500		Assume shared with other building uses
	1&2	Total Museum Net Area	13,200		
	1&2	Estimated Grossing Factor (12%)	1,584		To be confirmed during design stage
	1&2	Total Museum Area	14,784		
	1	General Building Storage / Service		1,400	Potentially shared. To be confirmed
	1	Other Non-Museum Uses (Existing Gymnasium)		8,700	To be confirmed during design stage
	Bsmt	Existing Male and Female Lockers		5,850	To be confirmed during design stage
	Bsmt	Circulation		900	Existing space to remain
	Bsmt	Existing Mechanical and Boiler		1,950	Existing space to remain

4.5.5 Preliminary Building Plans

The following concept-level floor plans have been created to demonstrate a possible configuration for the Fisheries Museum within the existing building. Lord Cultural Resources has made every effort to accommodate existing building conditions (washrooms, elevators, stairs, load bearing walls etc.) in this pre-design planning. Since Lord has not done a comprehensive architectural analysis, these should be interpreted as diagrammatic and not necessarily indicative of a final floor plan.

Additionally, it is acknowledged multiple layouts will be possible within this space, which would still satisfy Museum functional requirements. During this process Lord Cultural Resources explored several scenarios, with the preferred option presented below. This notwithstanding, the client may consider alternative layouts during the architectural design stage.



4.6 OPERATIONS

The key issues associated with the operation of the relocated, expanded and enhanced Fisheries Museum are:

- Admission Charges
- Other Revenue Centres
- Branding/Marketing
- Operating Schedule
- Governance and Staffing

4.6.1 Admission Charges

Existing admission charges for the Sweeney Fisheries Museum and charges at the comparable fisheries museums analyzed in this study help to provide the benchmarks for our recommendations. The recommendations also take into account the feedback from the workshop and interview process and our judgment and experience. The recommendations are as follows:

- Taking into account that the Town of Yarmouth will be the primary funder of the Fisheries Museum and the importance of the fishing industry to the region, we recommend that ideally privately sponsored free admission be offered for all residents of the Town of Yarmouth. Free admission could potentially be extended to all residents of the County of Yarmouth if they also provide annual operating support to the Fisheries Museum, but this is not assumed. The free admission would be limited to self-guided visits, including for school groups attending on field trips. Guided and behind the scenes tours would be charged for all visitors including Town residents who receive free admission for self-guided visits.
- Guided tours and behind the scenes tours are recommended to be surcharged over regular admission charges by \$4 per person. The tours are assumed to be scheduled only during peak periods or if pre-booked. Volunteer retired fishers should be asked to provide the guided and behind the scenes tours.
- For those paying fixed admission charges, we recommend a modification to the admission charge structure to include:
 - The definition of an adult is recommended to be from age 25-64 in order to provide a price break to help increase attendance by the youth, whether or not they are students. A youth ticket rate is recommended to apply to ages 13-24.
 - Charged admission for school groups that require guided tours or special programs at \$4.00 per student for guided tours and any special programs provided. Other school groups will be free and ideally sponsored.
 - 20% discount on the charged admission rates for tour, cruise and other groups of 15 or more people, estimated to average \$7.50.

- A family rate is not recommended because it creates an issue of the definition of a family, especially when more than two children are accompanied by only one adult or senior, or when visits are by more than one actual family.
- Recommended admission categories and charges during the opening three years of operation of the Fisheries Museum are as follows, plus applicable tax:
 - Adult (25-64): \$10.00
 - Senior (65+): \$8.00
 - Youth (13-24): \$6.00 – regardless of whether or not is a student
 - Child (3-12): \$4.00
 - Non-school groups: At least 15 persons with 20% discount on regular admission
 - Guided school groups: \$4.00 per student, free to teacher
 - Toddlers/Infants (0-2), researchers, other unpaid: \$0.00
- If there is no free admission for Town/County residents, then a weekday afternoon program during the school year is recommended with a particular focus on seniors. It would start at 2:00 p.m. after the school groups have left and which is commonly a slow attendance period. And it reflects less time available in the Museum to visit. Visitors would be offered a half price admission during the weekday afternoons in the school year and therefore in most of September/October and most of May/June. Sponsorship should be sought to fund it.
- Ideally sponsored free admission tickets are recommended to provide access to those who cannot afford admission. The Fisheries Museum should make such tickets available periodically through social service agencies, religious institutions and schools on a periodic basis.
- To encourage visitors to eat, shop and return to a downtown museum, admission should be described as a full day pass based on date stamped admission tickets. This practice will benefit nearby restaurants and retailers, helping to contribute to downtown revitalization.

4.6.2 Other Revenue Centres

The following points represent our recommendations/assumptions associated with other revenue centres:

- **Retail Sales:** Given the small size and second floor location of the Sweeney Fisheries Museum as well as relatively low attendance levels, it was appropriate not to include any retail items for sale in the Museum. In the larger, relocated Fisheries Museum with a front door on Main Street and potentially with a Tourism Information Centre nearby in the lobby area, a small retail store is recommended to be integrated with the admission desk. This allows the same staff and volunteers to handle both.
- **Café/Restaurant:** We do not recommend allocation of any space to a café or restaurant. However, limited grab and go food and beverage are recommended to be part of the retail store. This helps to limit capital costs and encourages visitors to eat and shop elsewhere, thereby contributing to downtown revitalization.
- **Venue Rentals:** At present, the Sweeney Fisheries Museum does not generate any revenue from venue rentals. In part this reflects the limitations of the location and space as well as the absence of public washrooms, air conditioning and the negative

impact of fish odours from the processing plant below during hot weather periods. For the relocated Fisheries Museum we have recommended a multi-purpose space that combines the lobby and a multi-purpose programming/events space. Interviews suggested that venue rental spaces, themed to the fishing industry, will be more interesting to some potential renters than hotel or restaurant spaces. Rentals will take place primarily during evening hours when the Museum is closed to the public and will include a liquor license.

- **Membership:** There are two motivations for membership. In lower-level categories (student, individual, dual, family) the main motivation is usually receiving value for money spent in unlimited free admission and discounts on retail, rentals and programs. However, lower-level memberships tend to be local and if free admission is provided to all Town and potentially County residents, then there is less value for money in becoming a lower-level member. For the purposes of this Relocation Feasibility Study, we have assumed implementation of local free admission and therefore no need for a lower-level membership program. However, an upper-level Friends membership is recommended based on support for the mission of the Museum, civic pride and altruism. With no direct benefit of membership, the Friends would receive tax receipts for their membership support.
- **Public and Educational Programs:** The existing Sweeney Fisheries Museum invites school group visits but does not offer or generate revenue from public and educational program. Opportunities for revenue generation include registered programs, periodic lectures, periodic behind the scenes tours, camps, and other opportunities developed by senior management at the time.
- **Other Sources of Earned Income:** In the context of the future Fisheries Museum, we recommend the following other earned income opportunities:
 - An annual fundraising gala
 - Replica slickers available for rent as charged costume rentals to allow for interesting photo opportunities.
 - An interactive donation box whose message conveys that donations help to preserve the fishing heritage of Yarmouth and area and helps to support free admission to those who cannot afford it. Interactivity on the basis of a mechanical response to the placement of money would be helpful.
- **Sponsorships and Donations:** In 2024 only \$415 was generated from donations to the Sweeney Museum in large part because there was no effort made to seek private support for it while contemplating a relocation. Support from the fishing industry should increase if the Museum is about the industry and not just the Sweeney company. One strategy to help increase private support is a recommended menu of sponsorships, which is an actual menu that would be promoted on the Yarmouth Fisheries Museum web site and inside the Museum. It would list a variety of sponsorship opportunities with attached prices for the year available to supporters on a first-come-first served basis. Such opportunities could range from sponsorship of half-priced admissions on weekday afternoons during the school year to support for specific programs and exhibits. Sponsors and donors should be recognized by means of an electronic board.

4.6.3 Branding/Marketing

We understand that there is no legal obligation for the Town of Yarmouth to retain the Sweeney name/brand in the relocated Fisheries Museum and that a name change is possible. The other main reasons to drop the Sweeney name from the overall museum, while retaining an important Sweeney Industries Gallery, is that that Sweeney name does not contribute to higher attendance, earned or contributed income. The recommended name is **Yarmouth Fisheries Museum**. It accurately denotes where the Museum is located and recognizes that the primary funder of the Museum is the Town of Yarmouth.

Other recommendations are as follows:

- Visible and good quality signage for the Yarmouth Fishing Museum will be needed on the Main Street side of the building and in the parking lot.
- An adequate marketing budget will be required to help increase attendance levels.
- There will be a need to enhance the web site associated with the Fisheries Museum and to develop a social media presence.

4.6.4 Operating Schedule

The experience of other museums both in Yarmouth and elsewhere in Nova Scotia suggests continuation of a seasonal operation for the Fisheries Museum. This will help to control staffing and other operating costs during months when relatively few visitors would be likely to attend.

The current operating schedule for the Sweeney Museum is from late May to mid-October on Monday through Saturday from 9 a.m. to 5 p.m.

With the introduction of the relocated Museum, we recommend opening from the Victoria Day to Thanksgiving weekends with public hours of 10:00 a.m. to 4:30 p.m. from Tuesday through Sunday. This change recognizes that Sundays are a peak day for museum visitation and that opening to the public at 10 a.m. will allow staff preparation time before opening in the morning. However, there should be opportunities for school groups to attend earlier if pre-booked. Closing at 4:30 p.m. recognizes lower attendance later in the day and allows more time for setting up evening rentals.

4.6.5 Governance, Staffing and Volunteers

- **Governance:** It is assumed that the governance of the relocated Fisheries Museum will continue to be by the Town of Yarmouth. All members of Yarmouth Town Council are assumed to continue to be governing Board members. However, an Advisory Board to include community champions is recommended to be established that would also be the Board of a Foundation group capable of issuing tax receipts for donations and sponsorships. This will help to substantially increase private donations.

- **Staffing:** The existing Sweeney Fisheries Museum in 2025 is managed by the Town of Yarmouth Museum/Grants Coordinator supported by one seasonal staff and a part-time staff person, currently comprising about 1.75 existing full-time equivalent (FTE) staff. In the context of the relocated, expanded and enhanced Fisheries Museum, we assume a growth in Museum staff to 3.0 FTE staff, as follows:
 - Director/Curator: Full-Time Year-Round reporting to the Town and responsible for developing and overseeing implementation of strategic plans, and specifically for collections development and care, exhibitions, and public and educational programs.
 - Business/Development Manager: Full-Time Year-Round including grant writing and private fundraising along with development of the retail and venue rentals business and for the membership program and volunteer coordination.
 - Admissions/Retail/Rentals/Programs/Administrative Assistants: Seasonal and part-time to combine as 1.0 FTE.
- **Volunteers:** There is currently no volunteer support for the Sweeney Fisheries Museum, but an opportunity to develop a successful program based on a staff person who would devote part of their time to volunteer recruitment, training and appreciation and the large number of retired and active fishers in the area. Some fishers currently volunteer as part of the Living Wharfs program. The bad weather strategy recommended earlier in this chapter will encourage volunteers to come in during the bad weather knowing there will be more visitors who will appreciate them.

4.7 OTHER ASSUMPTIONS

- If there is debt associated with the relocated Fisheries Museum, the Museum will not be responsible for any annual outlay for debt service as part of its operating costs.
- In rented facilities the Sweeney Fisheries Museum spent \$8,538 in building occupancy costs in 2024. It is assumed that that the Town of Yarmouth will provide in-kind support for building occupancy costs (utilities, repairs and maintenance and insurance) within the Town owned 275 Main Street building as part of its support for the Yarmouth Fisheries Museum and other recreational or community uses.
- A reserve fund for exhibition replacement is recommended to be implemented as part of the operating budget of the Fisheries Museum from its opening year to build up a fund for exhibition replacement that will be used starting no earlier than Year 4.
- All revenue and expense projections will be stated in year 2025 constant dollars; thus, a specific inflation factor is not included in our estimates. However, staffing costs are assumed to increase at a rate of 0.5% per year higher rate than whatever the prevailing rate of inflation is.

It must be noted that financial projections are subject to the inherent uncertainties of the future. There is no representation that the projections will be realized in whole or in part. However, taking the assumptions into account and based on the scope of our work, we believe that the projections in the following chapter of this report are reasonable.

5. FINANCIAL ANALYSES

This chapter sets out a summary of the pre-design capital cost estimate for the renovation of a portion of 275 Main Street to become the future home of the Yarmouth Fisheries Museum, including an estimate of exhibitions costs. Detailed capital costs prepared by the Altus Group are in Appendix B. Also included is an overview of federal and provincial capital funding programs and their eligibility requirements. These are followed by our projections of attendance, operating revenues and expenses for the opening three years of the relocation and expansion of the Yarmouth Fisheries Museum assuming implementation of the plans/assumptions in this report. The projections build primarily on 2024 actual data for the Sweeney Fisheries Museum and consider the contextual, comparables and market analyses in Chapters 2 and 3, and the assumptions in Chapter 4, as well as the judgment and experience of the consultants.

5.1 SUMMARY OF CAPITAL AND PROJECT COSTS

The magnitude pre-design (Class D) capital cost estimates prepared by the Altus Group are set out in Appendix B, focused on the limited renovation to the interior of the building only. A summary is provided here, focused on renovation costs, and totals about \$7,804,000. We also provide below a detailed evaluation of the capital costs associated with exhibitions for the relocated and enhanced Yarmouth Fisheries Museum and other soft costs combine for \$3,141,000. The combined renovation and soft costs are about **\$10,945,000**.

5.1.1 Renovation Capital Costs

At this pre-design stage of planning the capital cost estimates for the relocated and expanded Yarmouth Fisheries Museum at its assumed 275 Main Street site are preliminary. The renovation capital and other project costs were prepared by capital cost specialists the Altus Group based on the space and facilities program prepared by Lord Cultural Resources, and other assumptions set out in Chapters 4 of this report. The detailed capital cost estimates are provided in Appendix B and summarized here.

The capital cost estimates are based on the assumed renovation of 14,784 gross square feet (gsf) of space within the overall 275 Main Street building. The majority of the building (approximately 60%) is assumed to be for currently undetermined non-museum community uses. Additionally, the Town of Yarmouth has already budgeted for exterior

upgrades to the entire building and so capital costs associated with exterior façade and window upgrades, roof repairs and other needed exterior renovations have not been allocated to the Museum. Interior renovation costs allocated to the Museum include the museum lobby and reception, including a Tourist Information Kiosk, exhibition spaces, including a children's gallery, a multipurpose event room, collection storage, exhibition preparation, administration and other back of house spaces.

The gross floor renovation area is 14,784 sq. ft. In addition to interior renovation costs to enable the implementation of plans for the Fisheries Museum, the capital costs include an allowance for furniture, fixtures and equipment, as well as contingencies for design, professional fees and other soft costs.

At this predesign stage of planning, the renovation capital cost estimates total about \$7,804,000. This includes contingencies and escalations to July of 2027, as well as exclusions detailed in Appendix B.

5.1.2 Exhibition Capital Costs and Other Soft Costs

Exhibition capital costs are estimated here on a per sq. ft. basis. Please note that this is a pre-design estimate that will need to be refined over the course of a future exhibition design process. The estimate is based on the following main assumptions and is for the permanent exhibitions only. We have not recommended the allocation of space exclusive to temporary exhibitions because of the limited traveling product that would be relevant to the Yarmouth Fisheries Museum and, if available, the cost of such exhibitions would almost certainly exceed the revenues that might be generated. Rather, we have assumed that Museum staff will periodically refresh the permanent exhibitions, and these would be operating costs rather than capital costs.

- The new permanent exhibitions will be professionally designed, fabricated and installed (with exceptions as indicated below, where applicable).
- The program includes a total of 6,900 sq. ft of exhibition space.
- Of this total, 700 sq. ft. will be a children's gallery.
- The permanent exhibitions will use artifacts in contextual mode, which is to say that objects will be used to provide context to storytelling (as opposed to being displayed as aesthetic objects or in the current mass display or immersive mode).
- Some permanent exhibits will be designed to demonstrate processes (how things work).
- Film and video clips from publicly available and free-use sources will be interspersed throughout the exhibition galleries via readily available techniques and technologies to keep costs down (tablets, for example).
- Certain existing major exhibit features, such as the mocked-up transport vessel which is known to be popular, will be reutilized.
- A low to moderate degree of interactivity will be provided in the main exhibition area, with analogue-based interactivity to be utilized wherever possible.
- A high degree of interactivity will be provided in the children's gallery, but no artifacts will be used in this area and interactivity will be achieved via low-tech and analogue means, some of which may be developed in-house using "off-the-shelf" components.

- Collection development costs are assumed to be minimal, with most additional content being sourced from donations or via long-term loan.

The Museum may opt to develop an orientation film. The cost of developing an orientation film is included separate from the per sq. ft. permanent exhibition cost estimate, below, and includes the cost of professional film development, AV equipment and millwork but excludes the capital cost of the actual orientation theatre space, which is considered in the main construction cost. We would assume that the 5-7- minute orientation film would include some publicly available and free-use sources but would also require some new content. The cost is kept separate to enable the client group to understand exhibition costs with or without such a film and also because exact methods of orientation will be developed in the exhibition design process and may or may not use this particular technique.

According to *The Manual of Museum Exhibitions* (3rd ed., 2022), cost ranges for professionally developed, fabricated and installed exhibitions are as follows:

- \$250 to \$350 per sq. ft.: didactic exhibition, low level of media and interactivity
- \$350 to \$600 per sq. ft.: moderate level of interactivity and media; moderate density of museum display cases
- \$600 to \$800 per sq. ft.: high level of interactivity, media, and immersion.⁴

Given these assumptions and guidelines, we estimate an exhibition that will have a low to moderate level of interactivity in the main galleries and a high level of interactivity in the children's area, although in both cases this will be achieved via low-tech means which will keep costs down.

Given these assumptions, we project a cost for the main permanent exhibition of approximately \$250 per sq. ft. which assumes re-use of some exhibit elements and a primarily contextual and didactic display over a total of 6,200 sq. ft. Given these assumptions, the cost for the permanent exhibition would be about \$1.55 million.

For the children's gallery, we estimate an exhibition cost of \$200 per sq. ft. for the 700 sq. ft. space which would yield a cost of about \$140,000.

If an orientation film is developed for the orientation gallery, an allowance of \$75,000 should be set aside for film development (including production, AV equipment and millwork).

The total exhibition capital cost with all elements included would therefore be about \$1,765,000. Other soft costs bring the total to about \$3,141,000.

⁴ Erich Zuern, "Financial Planning" in M. Piacente, ed., *The Manual of Museum Exhibitions* (3rd. ed.). Lanham, MD and London: Rowman and Littlefield, 2022.

5.1.3 Potential Government Capital Funding Programs

This section reviews the most likely federal and provincial capital funding programs for which the relocated, expanded and enhanced Yarmouth Fisheries Museum should be eligible. The most likely federal funding would be from the Canada Cultural Spaces Fund and potentially the Canadian Cultural Legacy Fund.

In Nova Scotia the Community Museum Assistance program primarily offers support for operations but does make capital funds available too. Capital funds in Nova Scotia are often sought with support from political representatives, usually with an expectation of federal and municipal capital funding in which the donation of municipal land is recognized to be capital funding support. The use of part of 275 Main Street as the Yarmouth Fisheries Museum should be recognized as a municipal contribution to the capital project and a Town commitment to increase operating support should be positive as well.

Canada Cultural Spaces Fund (CCSF)

The Canada Cultural Spaces Fund supports the improvement of physical conditions for arts, heritage, culture, and creative innovation in three broad programmatic areas: renovation and construction projects, equipment acquisition, and feasibility studies. The fund focuses on the creation and development of creative hubs. The creative hub aspect may appear challenging for the Yarmouth Fisheries Museum but there have been numerous examples of funding for museums and other institutions for which “creative hub” might not appear strongly applicable,

Funds are available to not-for-profit arts and heritage organizations, non-profit organizations proposing the development of a creative hub, or a provincial/ territorial or municipal government supporting professional artistic or heritage activities. Federal organizations and Crown corporations are ineligible. Project evaluation is based on the availability and quality of spaces, how the project improves access to professional arts and heritage experiences, project viability and long-term financial impact.

For the most part, there are no stacking limits for a CCSF application; it is possible that CCSF will fund a project with a budget entirely sourced from other government funding bodies at all levels.

As for amounts, CCSF has a maximum contribution of 50% of total eligible project expenses (unless the project occurs in rural/ remote areas or addresses underserved communities) up to a ceiling of \$15 million. The maximum contribution for the purchase or rental of specialized equipment is \$5,000,000 or 50% of total eligible project costs (whichever is less). Feasibility studies are funded to a maximum of \$500,000, or 50% of total eligible project costs, whichever is less. CCSF requires that two-thirds of a project’s funding should be in place before an application can move forward (which includes CCSF’s potential 50%). This is not a particularly onerous requirement, since the applicant need demonstrate that only 16% of funding besides the CCSF’s potential 50% contribution has to be confirmed.

Eligible expenses include professional fees, construction or renovation of infrastructure, safety and accessibility renovations, specialized equipment (including sound and lighting equipment, multi-media equipment), installation of equipment, initial training,

professional fees related to feasibility, design, market analysis, resources, or specialized technicians.

As with most funding programs, applications typically require credible third-party economic impact and feasibility study assessments so that the funders can be confident in their investments. ***Operational sustainability into the future must be demonstrated. Usually, this means a municipal commitment to support operating costs.***

Canadian Heritage Legacy Fund

The Legacy Fund provides funding for community-initiated capital projects, intended for community use. Recipients may receive up to 50% eligible project expenses up to a maximum of \$500,000.

Eligible organizations must have been in existence for at least two years, which would be applicable to the Fisheries Museum, and that it needs to continue operating after the project's completion, which would also be the case. Eligible organizations include local incorporated non-profit organizations as well as municipal administrations and their agencies, boards and commissions that demonstrate an active partnership with at least one community-based group for the purposes of the proposed project. The establishment of the Yarmouth Fisheries Museum Foundation should meet this requirement.

Funding supports community-initiated capital projects that include the restoration, renovation, or transformation of existing buildings or exterior spaces with local community significance that are intended for community use and be accessible to the general public and pay tribute to a local historical personality, which should also be applicable to the legacy of W. Laurence Sweeney.

Nova Scotia Community Museum Assistance Program (CMAP)

This program provides grants for both operating costs and capital projects. It is focused on supporting the mission of community museums in Nova Scotia to preserve, protecting, and interpret the heritage resources of the province. Grant applications must be submitted each year on either April 1st and October 15th for projects which will occur after April 1st of the following year.

5.2 ON-SITE ATTENDANCE PROJECTIONS

To estimate the number of visitors likely to attend the future Fisheries Museum first requires a reasonable definition of who would or would not be defined as a visitor. For the purposes of this analysis, a visitor is someone who attends an exhibition or program within the Museum or is on site for venue rentals. The definition of a visitor excludes staff and volunteers, service and delivery people and those who access the Museum through the internet or through any outreach to schools or other community facilities. It is on-site attendance by actual visitors.

It is also important to emphasize that there is no single, simple computer formula that leads to accurate attendance projections. While there are ratios and formulas that have been used, including from the experience of comparable or similar institutions, all quantitative methods have weaknesses. And it is important to note, in utilizing data from other museums, that there are a variety of definitions of what constitutes a visitor and no complete certainty that the comparative attendance figures reported are accurate. The ratios and benchmarks nonetheless help to inform our judgment in preparing the attendance projections for the future Yarmouth Fisheries Museum. Accordingly, qualitative factors have also been considered below.

5.2.1 Ratios for On-Site Attendance Projections

The quantitative methods used to help inform the attendance projections for the future Yarmouth Fisheries Museum are as follows.

Extrapolation from Base Level Sweeney Fisheries Museum Figures Based on Exhibition Space Growth

The size of the exhibition space in a museum is an important determinant of first time and especially repeat visitation. The Sweeney Fisheries Museum has reported close to 2,000 annual visitors in recent years. In about 3,500 sq. ft. of exhibition space, that translates to 0.57 visitors per sq. ft. of exhibition space. The relocation and expansion is assumed to lead to 6,900 sq. ft. of exhibition space. Applying the same ratio of 0.57 visitors per square foot exhibition space leads to a rounded estimate of a **rounded 3,900 visitors in a stabilized year of operation**, which is assumed to be Year 3. However, the size of the exhibition space does not take into account the quality of the exhibits, free admissions, and other qualitative factors discussed below.

Ratios from Other Selected Fisheries Museums

Chapter 2.2 considers the experience of the Fisheries Museum of the Atlantic in Lunenburg and the New Bedford Fishing Museum Center in Massachusetts to help inform the recommendations and projections in this feasibility study. Two ratios are used to provide benchmarks for the attendance projections: one is based on the size of the exhibition space and second on the size of the regional population. Both methods are then applied to the Fisheries Museum and to Yarmouth.

- **On-Site Visitors Per Square Foot Exhibition Space:** The Fisheries Museum of the Atlantic is also a seasonal operation and reports 55,000 on-site visitors in 25,300 sq. ft. of exhibition space, or 2.17 visitors per sq. ft. of space. Applying this ratio to the assumed 6,900 sq. ft. of exhibition space at the Yarmouth Fisheries Museum suggests a rounded 15,000 annual visitors. The New Bedford Fishing Heritage Center reported about 4,100 on-site visitors in 2024 in about 3,000 sq. ft. of exhibition space, or 1.37 visitors per sq. ft. of exhibition space. Applying that ratio to the assumed 6,900 sq. ft. of exhibition space at the Yarmouth Fisheries Museum leads to an estimate of about 9,500 annual visitors. Averaging the two figures suggests a stabilized attendance for the Yarmouth Fisheries Museum at a rounded **12,300 annual visitors**.

- On-Site Visitors Per 1,000 County Population:** In 2021, Lunenburg County had a population of a rounded 48,600. At about 55,000 onsite visitors at the Fisheries Museum of the Atlantic, it led to a high ratio of visitors per thousand County population as shown on the following table. In contrast, the figure for the New Bedford Fishing Heritage Museum is very low. **The average of the two is 569 visitors per 1,000 County population, and when applied to the population of Yarmouth County (24,900) the result is a stabilized rounded attendance estimate of about 14,200 annual visitors for the relocated Yarmouth Fisheries Museum.**

Attendance Levels at Selected Fisheries Museums	2024 Attendance	Exhibition Space	Visitors/SF Exhibition Space	County Population (rounded)	Visitors per 1,000 County Population
Fisheries Museum of the Atlantic	55,000	25,300	2.17	48,600	1131.69
New Bedford Fishing Heritage Center	4,100	3,000	1.37	581,800	7.05
Average	• 25,300	14,150	1.77	315,200	569.37

Source: Research and interviews by Lord Cultural Resources.

Assumptions for Yarmouth Fisheries Museum		6,900		24,900	
---	--	-------	--	--------	--

Ratios from Other Art Museums in the Yarmouth Area

Chapter 2.3 includes attendance figures from other selected museums in and near Yarmouth. The most relevant for benchmarking purposes is the Yarmouth County Museum at about 4,500 annual visitors. Although the Yarmouth County Museum has a challenging location in a residential area, it offers 12,000 sq. ft. of exhibition space, which is more than the 6,900 sq. ft. assumed for the Yarmouth Fisheries Museum and it has a year-round operation. For the purposes of these attendance projections, we have assumed that the Fisheries Museum will, at the very least, match this attendance performance.

Averaging the Quantitative Methods

As stated, although all of the benchmarks above have weaknesses, they have been averaged to provide a starting figure of 8,700 annual visitors to the Yarmouth Fisheries Museum in the stabilized Year 3, based on quantitative methods. This estimate is modified in the qualitative analysis (below) to also consider other factors that require judgment and experience.

Quantitative Method: (Extrapolation Based on)	Attendance Estimate
Growth of the Fisheries Museum exhibition space	3,900
Visitors per sq. ft. exhibition space at other fisheries museums	12,300
Visitors per 1,000 county population at other fisheries museums	14,200
Matching attendance at Yarmouth County Museum	4,500
Average (rounded)	8,700

Qualitative and Other Considerations

The ratios above suggest an attendance level of about 8,700 visitors to the Yarmouth Fisheries Museum in the stabilized Year 3 assuming implementation of the plan for relocation, expansion and enhancement of the existing Sweeney Fisheries Museum as discussed in the previous chapters. However, the ratios for other fisheries museums suggest a higher attendance estimate and, in any case, each of the quantitative methods above has limitations and weaknesses. The following points represent qualitative factors, both positive and negative, that help to inform our judgment and lead to a modified attendance estimate:

Positive:

- A location on Main St. in downtown Yarmouth which allows crossover opportunities with restaurants, retail and service businesses, as well as hotel and conference facilities. This contrasts with the less visible and lower traffic location of the existing Sweeney Fisheries Museum on Water St.
- Local familiarity with the Mariners on Main building as a public space and continued public use of that building for other purposes.
- The availability of air conditioning during the warmer weather months.
- Ground floor access and good street visibility in contrast to the second-floor location of the existing Sweeney Museum.
- A larger exhibition space that will feature more contemporary interpretation and design and will be more engaging and interactive.
- A children's gallery that will motivate repeat visitation, as well as the potential use of films for entertainment while seated.
- The assumed inclusion of a tourist information kiosk in the lobby area to help attract additional visitors into the Museum.
- Some opportunities for venue rentals that will attract more people into the building.
- Additional space and staff that will result in more registered programs, lectures, summer camps, and other potential programs.
- A rebranding as the "Yarmouth Fisheries Museum".
- A strong fishing tradition in Yarmouth and southwestern Nova Scotia
- Higher expenditures on marketing, which should help to increase attendance and therefore visitor exposure to other revenue centres.
- Free admission to residents of the Town of Yarmouth, including self-guided school groups from both the Town and County given the integration of the school district.

Negative:

- Small resident population
- Limited changing content (no temporary exhibitions).
- Yarmouth's isolation from major population centres.
- Non-waterfront location: less of a natural linkage to the fisheries and isolation from existing wharf-side programs (Living Wharves).
- Competition from the Fisheries Museum of the Atlantic in Lunenburg.
- A modest staffing level to operate the Museum.
- Uncertainty regarding the future of cross-border tourism between Canada and the US.
- Uncertainty regarding the long-term future of the Yarmouth - Bar Harbor ferry.

Based on the foregoing and on our judgment and experience, we estimate that attendance in the future Yarmouth Fisheries Museum will be somewhat higher than indicated by the quantitative ratios to be about **9,000 in the stabilized Year 3**. As is common, the novelty factor and media attention paid to the reopening of an existing institution as well as the free admission to Town of Yarmouth residents will cause Year 1 attendance to be substantially higher at about 12,000, with Year 2 closer to Year 3 at 10,000 visitors.

In summary, the projected attendance levels during the opening three years after the Fisheries Museum relocation, expansion and other enhancements are as follows:

Year 1: 12,000

Year 2: 10,000

Year 3: 9,000

5.2.2 Attendance by Main Market Segments

The attendance projections that follow are segmented by the main resident, school and tourist market categories and build on data from 2024. Resident attendance will be highest in the opening year because of the curiosity factor and media attention and free admissions by Town of Yarmouth residents, while tourist attendance will grow over time. School groups are estimated to be at about the same percentage each year. Most Town and County school groups will attend for free, but some will pay for guided tours. Tourist attendance will grow over time, assuming continued operation of the ferry.

The attendance projections by ticket category take into account that Town of Yarmouth residents will receive free admission and that free admission will also be provided to both Town and County schools. Along with other free admission visitors are indirectly paid visitors, including rentals, members and programs visitors. Combined unpaid and indirect paid visitors are estimated to account for 50% of total attendance in Year 1 and drop to about 40% in subsequent years.

Among paid visitors, adults will account for the highest number followed by seniors. Many of the children will be free admission visitors from within the Town of Yarmouth, but County and other children will be attracted as first time and visitors to the hands-on children's gallery.

Yarmouth Fisheries Museum (rounded)	Base Level	Year 1 %	Year 2 %	Year 3 %	Year 1	Year 2	Year 3
Projected Total On-Site Attendance	1,943				12,000	10,000	9,000
Attendance by Main Segment							
Residents (50-km. radius)	40%	70%	60%	60%	8,400	6,000	5,400
School Groups	10%	5%	5%	5%	600	500	450
Tourists	50%	25%	35%	35%	3,000	3,500	3,150
Total	100%	100%	100%	100%	12,000	10,000	9,000
Attendance by Ticket Category*							
Adult (25-24)		23%	25%	25%	2,760	2,500	2,250
Senior (65+)		12%	15%	15%	1,440	1,500	1,350
Youth (13-24)		4%	6%	6%	480	600	540
Child (3-12)		9%	12%	12%	1,080	1,200	1,080
Gulded School Groups		1%	1%	1%	120	100	90
Non-School Groups		1%	1%	1%	120	100	90
Indirect Paid/Unpaid		50%	40%	40%	6,000	4,000	3,600
Total		100%	100%	100%	12,000	10,000	9,000

* Assumed admission ticket categories are different for Yarmouth Fisheries Museum than when Sweeney Fisheries Museum

5.3 PROJECTED OPERATING REVENUES

The projections of operating revenues over the opening three-year period of the relocated and expanded Fisheries Museum are set out in the following categories, and build on a base level of largely 2024 figures for the Sweeney Fisheries Museum:

- Admissions
- Memberships
- Retail Sales
- Venue Rentals
- Public and Educational Programs
- Fundraising Event
- Existing Private Support
- Existing Government Support

The bottom line of the projections is the *additional* amount required from private and government support over the 2024 levels of government and private support for the Sweeney Fisheries Museum.

5.3.1 Admissions

The admissions revenue generated by the Sweeney Fisheries Museum was about \$5,678 in 2024. At 1,943 visitors, that translates to about \$2.92 per visitor. In the context of more exhibition space and a much better visitor experience, admission charges are assumed to increase to the levels set out in the following table, with no assumed changes during the opening three years of operation. However, many visitors will attend for free. The table indicates our estimates of attendance levels by each admission ticket category and assumes a 5% reduction in admission revenues to take promotional discounts into account. Moreover, the revenues from periodic guided behind the scenes tours are included with programming revenues not admissions revenues.

These estimates and assumptions lead to the following admissions revenue projections.

Admissions Revenue	Base Level	Admission Charge	Year 1 Visits	Year 1 Revenue	Year 2 Visits	Year 2 Revenue	Year 3 Visits	Year 3 Revenue
Adult (25-64)		\$10.00	2,760	\$27,600	2,500	\$25,000	2,250	\$22,500
Senior (65+)		\$8.00	1,440	\$11,520	1,500	\$12,000	1,350	\$10,800
Youth (13-24)		\$6.00	480	\$2,880	600	\$3,600	540	\$3,240
Child (3-12)		\$4.00	1,080	\$4,320	1,200	\$4,800	1,080	\$4,320
Guided School Groups		\$4.00	120	\$480	100	\$400	90	\$360
Non-School Groups (avg.)		\$7.50	120	\$900	100	\$750	90	\$675
Indirect Paid/Unpaid		\$0.00	6,000	\$0	4,000	\$0	3,600	\$0
Total Revenue before discounts			12,000	\$47,700	10,000	\$46,550	9,000	\$41,895
Total Revenue after discounts (5%)	\$5,678			\$45,315		\$44,223		\$39,800
Admission Revenue per Visitor	\$2.92			\$3.78		\$4.42		\$4.42

5.3.2 Memberships

The existing Sweeney Fisheries Museum does not have a membership program. Since we have assumed implementation of local free admission, this will substantially reduce the incentive for lower-level memberships. However, an upper-level Friends membership is recommended based on support for the mission of the Museum, including from the fishing industry, as well as civic pride and altruism. With no direct benefit of membership, the Friends would receive tax receipts for their membership support.

Although amounts may vary widely, we estimate revenues from the upper-level membership program at \$15,000 in Year 1, reflecting opening year excitement, and declining to \$12,000 in subsequent years

Memberships	Base Level	Year 1	Year 2	Year 3
Total Revenue	\$0	\$15,000	\$12,000	\$12,000

5.3.3 Retail Sales

The existing Sweeney Fisheries Museum does not offer any retail sales opportunities because of its poor location and low attendance levels. This study has assumed a 700 sq. ft. space to serve both museum reception/admissions/retail and a Tourist Information Kiosk, with both the Museum and the Tourist Information Kiosk operational only during the Museum’s mid-May to mid-October season.

For the purposes of these projections the Tourist Information Kiosk is assumed to be 200 sq. ft. with reception/admissions/retail at 500 sq. ft. Within the 500 sq. ft., 200 sq. ft. is assumed to be for retail products, including a small cooler selling desserts and cold beverages and a machine for hot beverages. The Tourist Information Kiosk would be operated separately by the Town while the admissions/information and retail operation will be operated by the same staff, sometimes the recommended Business/Development Manager and other times by part-time staff and volunteers.

Our estimate for retail sales is that they will average \$1.50 per visitor in Year 1 and grow each year to reflect better market and product knowledge over time. This leads to the following projections. The estimate of the retail cost of goods sold is part of the operating expense projections later in this chapter.

Retail Sales (200 nsf)	Base Level	Year 1	Year 2	Year 3
Total On-Site Attendance	1,943	12,000	10,000	9,000
Sales per Visitor	\$0.00	\$1.50	\$1.60	\$1.70
Total Sales	\$0	\$18,000	\$16,000	\$15,300
Sales per Net Sq. Ft	\$0	\$90	\$80	\$77

5.3.4 Venue Rentals

Just as there have been no retail sales in the existing Sweeney Museum, there have also been no venue rentals. Chapter 4 includes a recommendation to initiate periodic venue rentals in a very small space in the existing Sweeney Fisheries Museum but there should be more opportunities for venue rentals in the larger Yarmouth Fisheries Museum. The primary available space is the multi-purpose room, with potential periodic use of the exhibition spaces.

The ability to generate revenues from rentals will also be facilitated by a Business/Development Manager staff position responsible for revenue generation and supported by part-time staff and volunteers. Also, very important to venue rentals income is the assumption that the Town will support a liquor license for the Museum.

Our estimates of revenue from venue rentals assume an average of 20 -24 major rentals each year, with growth over time. The average revenue per major venue rental is estimated at \$900, including a commission on catering. It is also estimated that smaller rentals, including birthday parties associated with the children’s gallery, will generate 25% of the revenues from the major rentals. This leads to the following projections.

Venue Rentals	Base Level		Year 1	Year 2	Year 3
Total Major Rentals			20	22	24
Average Revenue per Major Rental			\$900	\$900	\$900
Total Revenue			\$18,000	\$19,800	\$21,600
Revenues from Smaller Rentals			\$4,500	\$4,950	\$5,400
Total Revenues	\$0		\$22,500	\$22,725	\$22,952

5.3.5 Public and Educational Programs

Public and educational programs are often a substantial revenue generator for museums, including registered charged programs, summer and holiday camps, teacher training and other programs. In 2024, no revenue was generated from programs for the Sweeney Fisheries Museum, reflecting limited space and staff resources.

With the implementation of the relocation and expansion, including public and school programs in the multi-purpose space, as well as additional staff and volunteer resources, there should be an opportunity for some revenue from public and educational programs. That includes public programs developed by staff that could range from registered programs, periodic behind the scenes tours, and other opportunities developed by senior management at the time.

Although earned income from public and educational programs may vary widely, the projected revenues are as follows and to grow over time, recognizing that the costs associated with those programs will exceed the revenues because such programs are important to the mission of the Yarmouth Fisheries Museum.

Public and Educational Programs	Base Level		Year 1	Year 2	Year 3
Total Revenue	\$0		\$8,000	\$10,000	\$12,000

5.3.6 Fundraising Event and Other Earned Income (Net)

The Sweeney Fisheries Museum has not had an annual fundraising event, but it has been assumed in the context of the relocated and expanded Yarmouth Fisheries Museum. This should include support from the fishing industry and other regional businesses and families. The Foundation will be primarily responsible for organizing the fundraising event, likely a gala dinner, supported by the Museum Business/ Development Manager.

Other sources of earned income could include the rental of replica slickers as charged costume rentals to allow for interesting photo opportunities, an interactive donation box, and other opportunities identified by museum management.

The following table indicates our projections of annual revenues from an annual fundraising event and other sources of earned income, which may vary widely, and are projected to grow over time.

Fundraising Event (net)/Other Earned	Base Level		Year 1	Year 2	Year 3
Total Revenue	\$0		\$22,000	\$24,000	\$26,000

5.3.7 Existing Private Support

The Sweeney Fisheries Museum generated only \$415 in private support in 2024 because there was no significant attempt to grow such revenues knowing that a relocation is planned. Although private support is likely to increase substantially once the relocated Museum is operational, for the purpose of these projections this amount is assumed to continue for each year projected. This will allow the bottom line of the projections to be the *additional* amount required from private and government sources to break even on operations each year.

5.3.8 Existing Government Support

In 2024, the Sweeney Fisheries Museum received \$29,638 in government funding, primarily from the Town of Yarmouth. This amount is assumed to remain unchanged for all three years projected to help lead to a bottom line of the *additional* amount required from government and private sources to break even on operations for each year projected.

5.4 PROJECTED OPERATING EXPENSES

There are eight categories of projected operating expenses for the Yarmouth Fisheries Museum over the three-year period projected, which are built on a base level of Sweeney Fisheries Museum operating expense figures in 2024:

- Salaries, Wages and Benefits
- Building Occupancy
- Exhibitions
- Education and Public Programs
- Collections Care and Acquisitions
- General and Administrative
- Marketing
- Retail Cost of Goods Sold

The projections do not include building occupancy costs (building repairs and maintenance, utilities and insurance) as these costs have been assumed to continue to be paid by the Town of Yarmouth for the entire 275 Main Street building which it owns.

5.4.1 Salaries, Wages and Benefits

In 2024, the Sweeney Fisheries Museum allocated \$29,967 to 1.75 full-time equivalent (FTE) salaries, wages, and employee benefits. The assumption is that with the implementation of the relocation, expansion and enhancement of the Yarmouth Fisheries Museum, there will be an increase to two full-time year-round staff plus seasonal part-timers that would increase the staffing level to 3.0 FTE personnel as set out in the following table for the three years projected.

Since the Fisheries Museum staff will be Town employees, the level of salaries, wages and benefits paid will be determined by the Town. At this point we have been requested to assume that the total salaries, wages and benefits will be \$165,000 in the opening year. Since we have assumed that salaries will exceed the prevailing rate of inflation by a very modest 0.5% per year each year over the Year 1 level, this leads to the following projections.

Staffing Costs	Base Level	Year 1	Year 2	Year 3
Director/Curator (FT)				
Business/Development Manager (FT)				
Seasonal/Part-Time Staff				
Total Staff Salaries and Wages				
Staff Benefits				
Total Staffing Costs	\$29,967	\$165,000	\$165,825	\$166,654

5.4.2 Building Occupancy

In rented facilities the Sweeney Fisheries Museum spent about \$8,548 on building occupancy costs in 2024. The relocation to 275 Main Street will be to a Town-owned building and the assumption is that the Town of Yarmouth will continue to absorb the occupancy costs (building repairs and maintenance, utilities, insurance, and security systems) for the entire building, including the Yarmouth Fisheries Museum. Therefore, the following table does not include any occupancy cost projections payable directly by the Fisheries Museum.

Occupancy Costs	Base Level	Year 1	Year 2	Year 3
Total Occupancy Costs	\$8,537	\$0	\$0	\$0

5.4.3 Exhibitions

In 2024, there were no non-staff expenditures for exhibition repairs and maintenance, temporary exhibitions or exhibit replacement, as unchanged exhibits at the Sweeney Fisheries Museum has largely been the case for many years. However, the assumption is that there will be a capital investment in new or modified exhibits at the future Yarmouth Fisheries Museum, including the children’s gallery, to total about \$1.765 million. Better quality exhibits will lead to more first-time and repeat visitation and higher attendance levels but there will need to be annual allocations for routine repairs and maintenance and a recommended reserve fund for replacement of the permanent exhibitions. It has also been assumed that no space will be allocated for temporary exhibitions because of the cost of bringing in external temporary exhibitions and assuming that change will take place as staff modify or replace the permanent exhibits.

Routine maintenance costs will increase over time while the reserve for exhibition replacement will be initiated at opening and will build up each year but will likely not be spent until the third or fourth year of operation. Our estimates are as follows.

Exhibitions Costs	Base Level	Year 1	Year 2	Year 3
Routine Maintenance		\$3,000	\$6,000	\$8,000
Reserve for Exhibit Replacenet		\$20,000	\$20,000	\$20,000
Total Costs	\$0	\$23,000	\$26,000	\$28,000

5.4.4 Collections Care and Acquisitions

No allocation for collections acquisition of care was made in 2024. We have assumed that all collection acquisitions for the Yarmouth Fisheries Museum will be made by donation. However, a budget is needed for material and supplies related to conservation and collections care. Our estimates are as follows, with higher costs in the opening year for initial purchases of supplies.

Collections Acquisitions and Care	Base Level	Year 1	Year 2	Year 3
Total Costs	\$0	\$5,000	\$4,000	\$4,000

5.4.5 Public and Educational Programs

It is the norm that operating costs for public and educational programs exceed the revenues that may be generated in order to meet mission-related access objectives. Accordingly, many public and educational programs at museums are either free or offered at a lower amount than the actual cost of delivering the programs. This is especially true for school programs.

For the purposes of these projections, we estimate that expenses will be 1.5 times the projected revenues each year, with some costs potentially recovered through sponsorships. This leads to the following projections.

Public and Education Programs	Base Level	Year 1	Year 2	Year 3
Total Costs	\$0	\$12,000	\$15,000	\$18,000

5.4.6 General and Administrative

General and administrative costs often include office and related supplies, equipment, mailing, printing, telephone, travel, conferences, volunteer perquisites, professional services, dues and subscriptions, credit card fees, entertainment, and items that do not fit into the other expense categories. The categories vary by institution but usually relate closely to staffing levels and costs and are usually in the range of 10-15% of staffing costs.

In 2024, the Sweeney Fisheries Museum did not show any operating costs associated with general and administrative expenses as they were absorbed by the Town of Yarmouth. Although there may continue to be in-kind support for the general and administrative costs of the Yarmouth Fisheries Museum by the Town of Yarmouth, it is assumed that some costs will be allocated to the Museum.

For the purposes of these projections, we estimate that 5% of staffing costs will be allocated to the Fisheries Museum. This leads to the following projections.

General and Administrative	Base Level	Year 1	Year 2	Year 3
Staffing Costs		\$165,000	\$165,825	\$166,654
G+A as % of Staffing Costs		5.0%	5.0%	5.0%
Total Costs	\$0	\$8,250	\$8,291	\$8,333

5.4.7 Marketing

Non-staff marketing costs in 2024 were \$882, which was about 2% of total operating expenditures and thus somewhat lower than the common 3-5% range. At 1,943 visitors the marketing expenditures translated to about 45 cents per visitor.

With higher attendance we have estimated the marketing costs at one dollar per visitor for Years 2 and 3 and at \$1.25 per visitor in Year 1 to account for a grand opening celebration and other initial marketing associated with the expansion. This leads to the following projections.

Marketing Costs	Base Level	Year 1	Year 2	Year 3
Attendance	1,941	12,000	10,000	9,000
Allocation per Visitor	\$0.45	\$1.25	\$1.00	\$1.00
Total Costs	\$882	\$15,000	\$10,000	\$9,000

5.4.8 Retail Cost of Goods Sold

The Sweeney Fisheries Museum does not allocate any space to retail sales, reflecting both limited attendance and space. As set out earlier in this chapter, we have assumed a small retail space integrated with admissions to also include limited grab and go snacks and beverages, resulting in modest retail sales revenue.

The norm for the retail cost of goods sold is 50-60%. We have assumed 55% for the purposes of these projections.

Retail Cost of Goods Sold	Base Level	Year 1	Year 2	Year 3
Total Costs (@55%)	\$0	\$9,900	\$8,800	\$8,415

5.5 SUMMARY OF PROJECTIONS

The following table summarizes the projections of attendance, operating revenues and expenses for the relocated, expanded and substantially enhanced Sweeney Fisheries Museum, which is to be rebranded the Yarmouth Fisheries Museum, during the three years of operation after implementation of the relocation. On-site attendance levels are estimated to increase substantially from the current attendance level of close to 2,000 visitors to stabilize at about 9,000 visitors per year, still based on a seasonal operation.

Reflecting a needed but modest growth in staffing levels, the total annual operating budget, in 2025 dollars, is estimated to increase from the \$39,000 range in 2024 to about \$242,000 in the stabilized Year 3. This may be compared to the \$385,000 operating budget of the Yarmouth County Museum and Archives, the \$486,000 (US \$351,000) operating budget of the New Bedford Fishing Heritage Center and the \$2.7 million operating budget of the Fisheries Museum of the Atlantic. Earned income levels are projected to stabilize at about 53% of total operating revenues to reflect in-kind occupancy cost support from the Town of Yarmouth and limited staffing costs, as well as an emphasis on generating earned income that is not possible in the existing Sweeney Fisheries Museum.

After taking projected operating expenses into account, the gap between projected expenses and revenues is about \$77,000 in Year 1 and growing to over \$84,000 by Year 3. This will necessitate additional financial support from the Town of Yarmouth and the Province of Nova Scotia as well as substantially more private support from private supporters including the fishing industry, other corporate, foundation and family supporters of the Yarmouth Fishing Museum.

The projections reflect the reality that a relocated, expanded and enhanced Yarmouth Fisheries Museum will lead to better service to the community and region and result in increased attendance and earned income, but that higher staffing and other operating costs will exceed the revenues that may be generated.

Summary of Attendance, Operating Revenue and Expense Projections

	Base Level	Year 1	Year 2	Year 3	Year 1%	Year 2%	Year 3 %
Total Attendance	1,943	12,000	10,000	9,000			
Revenues							
Admissions	\$5,678	\$45,315	\$44,223	\$39,800	19.0%	18.6%	16.4%
Retail Sales	\$0	\$18,000	\$16,000	\$15,300	7.6%	6.7%	6.3%
Memberships	\$0	\$15,000	\$12,000	\$12,000	6.3%	5.0%	5.0%
Facility Rentals	\$0	\$22,500	\$22,725	\$22,952	9.4%	9.6%	9.5%
Public and Educational Programs	\$0	\$8,000	\$10,000	\$12,000	3.4%	4.2%	5.0%
Fundraising Event (net)/Other Earned	\$0	\$22,000	\$24,000	\$26,000	9.2%	10.1%	10.7%
Base Level Private Support	\$415	\$415	\$415	\$415	0.2%	0.2%	0.2%
Base Level Government Support	\$29,636	\$29,636	\$29,636	\$29,636	12.4%	12.5%	12.2%
Total Revenue	\$35,729	\$160,866	\$158,999	\$158,104	67.5%	66.8%	65.2%
Expenses							
Salaries, Wages, Benefits	\$29,967	\$165,000	\$165,825	\$166,654	69.3%	69.7%	68.8%
Occupancy	\$8,537	\$0	\$0	\$0	0.0%	0.0%	0.0%
Exhibitions	\$0	\$23,000	\$26,000	\$28,000	9.7%	10.9%	11.6%
Collections Care and Acquisitions	\$0	\$5,000	\$4,000	\$4,000	2.1%	1.7%	1.7%
Public and Educational Programs	\$0	\$12,000	\$15,000	\$18,000	5.0%	6.3%	7.4%
General & Administrative	\$0	\$8,250	\$8,291	\$8,333	3.5%	3.5%	3.4%
Marketing	\$882	\$15,000	\$10,000	\$9,000	6.3%	4.2%	3.7%
Retail Cost of Goods Sold	\$0	\$9,900	\$8,800	\$8,415	4.2%	3.7%	3.5%
Total Expenses	\$39,386	\$238,150	\$237,916	\$242,402	100%	100%	100%
Additional Amount Needed from Government and Private Sources to Break Even on Operations	(\$3,657)	(\$77,284)	(\$78,918)	(\$84,298)	-32.5%	-33.2%	-34.8%
Earned Income as % of Operating Costs					54.9%	54.2%	52.8%

APPENDIX A: ACKNOWLEDGMENTS

We acknowledge here, in alphabetical order, those who took part in the workshop and interview process for this Relocation Feasibility Study. Special thanks to Tianna Williams for collecting information and scheduling the interviews, and for her leadership.

Town of Yarmouth Workshop Participants

- Steve Berry, Deputy Mayor
- Gil Dares, Councillor
- Belle Hatfield, Councillor
- Jeff Gushue, Chief Administrative Officer
- Jean-Guy Leblanc, Project Engineer
- Derek Lesser, Councillor
- Pam Mood, Mayor
- Natalie Smith, Director of Planning and Economic Development
- Gerry Verran, Director of Finance
- Tianna Williams, Museum/Grants Coordinator

Other Interviews

- DeMario Dunkley, Yarmouth Town Engineer
- Nadine Gates, Director/Curator, Yarmouth County Museum
- Rylynn Husted, Programs Manager, Mariners Centre
- Ryan MacDonald, Programs Coordinator, Tri-County Regional Centre for Education
- Neil Mackenzie, CEO, Yarmouth and Acadian Shores Tourism Association
- Adrian Morrison, Curator of Collections, Fisheries Museum of the Atlantic
- Richard Piotrowski, General Manager, Yarmouth and Area Chamber of Commerce
- Rose-Anne Smeltzer, Lead Interpreter, Fisheries Museum of the Atlantic
- Luara Smith, Curator of Collections, Fisheries Museum of the Atlantic
- David Sollows, Board Member of Several Heritage Organizations/Museums
- Angela Saunders, General Manager, Fisheries Museum of the Atlantic

- Colin Stinson, Director, Marketing and Visitor Experience, Art Gallery of Nova Scotia

Lord Cultural Resources Consultant Team

- Brad King, Vice President, Strategy
- Aren Kurkjian, Development Associate, Altus Group
- Ted Silberberg, Senior Principal, Market and Financial Planning (study lead)
- Sean Stanwick, Director, Facilities Planning



APPENDIX B: DETAILED CAPITAL COST ESTIMATE



Altus Group

**FISHERIES MUSEUM RENOVATION
ORDER OF MAGNITUDE ESTIMATE
44503313**

PREPARED FOR:

Lord Cultural Resources

1300 Yonge Street - Suite 400, Toronto, Ontario. M4T 1X3

PREPARED BY:

Altus Expert Services

33 Yonge Street, Suite 500, Toronto, ON, M5E 1G4

Phone: (416) 641-9500

Issue Date: July 4, 2025

Altus Expert Services

EXPERIENCE | INDEPENDENCE | INSIGHT

altusgroup.com

Unpublished Work Copyright © 2025 | Altus Group |



July 4, 2025

Project No.: 44503313

Lord Cultural Resources
1300 Yonge Street - Suite 400
Toronto, Ontario
M4T 1X3

Attention: Sean Stanwick

Re: FISHERIES MUSEUM RENOVATION, ORDER OF MAGNITUDE ESTIMATE , R2

Dear Sean

We submit for your review our report in accordance with the terms of our engagement.

The estimate includes all direct and indirect construction costs and general conditions, as well as, contractor's overheads and profit. We have assumed the project would be procured through a stipulated lump sum contract.

The estimate includes the following contingencies, which are defined within the body of this report.

- 20.0% for design and pricing contingency
- 12.7% for escalation contingency
- 10.0% for construction contingency (post contract change orders)
- 0.0% for construction phasing - **EXCLUDED**
- 0.0% for acceleration / overtime - **EXCLUDED**

This report is not intended for general circulation, publication or reproduction for any other person or purpose without express written permission to each specific instance. Furthermore, this report is produced for the exclusive use of **Lord Cultural Resources** and is not to be relied upon by any other party. Altus Group Limited does not hold any reporting responsibility to any other party.

Details of our Client Data Policy are located on our website at www.altusgroup.com.

Should you have questions related to this report please do not hesitate to contact the undersigned.

Yours Truly,
ALTUS GROUP LIMITED

Anil Ramjee PQS MRICS
Director

Kumaresan Sakhivel PQS
Senior Cost Consultant

REPORT CONTENTS

- 1 **Introduction**
 - 1.1 Scope
 - 1.2 Area / Project Statistics

- 2 **Project Details**
 - 2.1 General Information
 - 2.2 Location
 - 2.3 Measurement and Pricing
 - 2.4 Environmental Sustainability
 - 2.5 Taxes
 - 2.6 General Requirements and Fees
 - 2.7 Procurement Methodology
 - 2.8 Schedule / Phasing

- 3 **Scope Assumptions & Exclusions**
 - 3.1 Inclusions and Assumptions
 - 3.2 Construction Budget Exclusions

- 4 **Contingencies**
 - 4.1 General
 - 4.2 Design and Pricing
 - 4.3 Escalation
 - 4.4 Construction Contingency (Post-Contract)
 - 4.5 Construction Phasing
 - 4.6 Acceleration / Overtime
 - 4.7 Potential Tariff Implications

- 5 **General Statement of Liability**
 - 5.1 Probable Costs and Ongoing Cost Control

- 6 **Estimate Documentation**

- 7 **List of Appendices**

1 Introduction

1.1 Scope

This project includes for the renovation of existing community center building to accommodate a fisheries museum in 275 Main Street, Yarmouth, Nova Scotia. The program for the building includes museum lobby, children's gallery, reception, multipurpose room, exhibit gallery, collection storage, museum admin, kitchen/storage, and loading/shipping/ receiving. The gross floor renovation area is 1,373m² (14,784 sqft).

The Order of Magnitude Estimate is intended to provide a realistic budget of the hard construction costs based on the level of design information provided. The estimate reflects our opinion as to the fair market value for the hard construction of this proposed project and is not intended to predict the lowest bid.

The estimate includes all direct and indirect construction costs consistent with the design information provided. Certain exclusions and qualifications may apply; please refer to Section 3 and the detail within the estimate report.

2 Project Details

2.1 General Information

From the design information provided, we have measured quantities where possible and applied unit rates for the specific items based on the conceptual design drawings and outline project specifications. Where design information was limited, we made inquiries to the relevant design discipline and/or made assumptions based on our experience with projects of a similar type, size, and standard of quality.

2.2 Location

The location cost base for this estimate is Yarmouth, Nova Scotia

2.3 Measurement and Pricing

The estimate has been derived using generally accepted principles on method of measurement in accordance with the Canadian Institute of Quantity Surveyors Elemental Cost Analysis and/or Method of Measurement of Construction Works.

The unit rates used in this estimate where applicable include labor and material, equipment, and subcontractor's overheads and profit. Pricing is based on our experience with projects of a similar design.

We have assumed that both union and non-union commercial contractors would perform the work. This estimate is not intended to be a prediction of the lowest bid and assumes competitive bidding for all aspects of the work.

2.4 Environmental Sustainability

The estimate incorporates sustainable design elements consistent with Green Standards as identified within the design information provided. Although the design and pricing incorporate energy efficient and sustainable elements, the costs associated with the actual certification with a regulatory body is not included in the estimate. Premium costs relating to the additional site management required and submission of the necessary documentation for certification is excluded from this estimate.

2.5 Taxes

All taxes have been excluded from this estimate.

2.6 General Requirements and Fees

The fee for the Contractor is included. The general requirements are based on our assumptions of the anticipated construction approach and schedule.

The estimate excludes premiums associated with bonding and insurance

2.7 Procurement Methodology

We have assumed that the project would be procured with a General Contractor approach under a CCDC standard form of contract.

We have assumed a minimum of three bids would be received for all major trade categories of work to establish competitive bidding and tender results. The estimate is a determination of fair market pricing and not a prediction of lowest bid in any trade category. Please note that should the above minimum bidding conditions not occur on this project, construction bids received could vary significantly from the estimated costs included within this report.

2.8 Schedule / Phasing

The project has been priced to be completed as a single phase.

The unit rates in our estimate are based on construction activities occurring during normal working hours and proceeding within a non-accelerated schedule.

3 Scope Assumptions & Exclusions

3.1 Inclusions and Assumptions

The inclusions for this project have been based on all the documentation provided to date. We have made assumptions where applicable and have noted them below.

- Exterior facade improvement allowance
- Gypsum partitions
- Interior wood doors, frames and hardware
- Interior floor finishes
- Interior wall finishes
- Interior ceiling finishes
- Fittings & fixtures
- Demolition
- Alteration allowance to accommodate renovation

Mechanical Installation

- Plumbing pipework, fittings, etc.
- Sprinkler installation
- HVAC
- Building Automated Controls

Electrical Installation

- Electrical distribution, conduits, etc.
- Lighting, devices and heating
- Systems and ancillaries

Soft costs allowance includes for the following:

Professional Fees

- Project Management Fee
- Architect's Fee
- Civil Engineer's Fee
- Structural Engineer's Fee
- Mechanical Engineer's Fee
- Electrical Engineer's Fee
- Cost Consultant Fee
- Other Fees

Development Cost

- Property Tax
- Legal Fees
- RFP/RFQ Costs
- Financing
- Investigations

3.2 Construction Budget Exclusions

The following items are excluded from the estimate:

- Taxes
- Realty taxes, levies, insurance
- Operating or maintenance expenses
- Interest/finance charges (on any financing)
- Vibration/noise control premiums
- Asbestos abatement
- Sole sourcing of materials, services, or equipment
- Phasing premium (assumed to be executed in a single phase)
- Site development costs
- Base building mechanical system excluded
- After hours

4 Contingencies

4.1 General

The effective use of contingencies in construction cost planning requires a clear understanding of estimating risks in both a project specific and general construction market sense. The appropriate level of contingency is dependent on the amount of information available, knowledge of the design teams methods and philosophy, the timing of the estimate preparation relative to the project design and construction schedule, and the anticipated complexity of the construction work.

4.2 Design and Pricing

A design and pricing contingency of **20%** is included in the estimate. This allowance where included is meant to cover pricing and design unknowns during the preparation of this estimate, and not additional scope or functional program requirements

4.3 Escalation

An escalation contingency of **10.3%** has been included in the estimate . This allowance is meant to address anticipated changes in construction costs due to market fluctuations between the date of this report and the anticipated midpoint of construction phase.

Escalation is calculated, based on the following parameters:

- Annual Escalation Rate 4.0%
- Estimate Base Date May 14, 2025
- Construction Start Date July 1, 2027
- Construction Duration in Months 24
- Pre-Contract Escalation Period 26
- Post Contract Escalation Period (Midpoint) 12
- Total Escalation Period in Months 38

4.4 Construction Contingency (Post Contract)

Post contract contingency has been included at **10%** of the construction cost. The intention of this contingency is to cover the cost of post contract change orders.

4.5 Construction Phasing

Construction phasing contingency has been **EXCLUDED** from the estimate. The construction work is assumed to be completed in a single phase

4.6 Acceleration / Overtime

Acceleration / Overtime contingency has been **EXCLUDED** from the estimate. It is assumed that all construction work will be completed within normal working hours

4.7 Potential Tariff Implications

The Tariff's have the potential to materially impact the project construction budget beyond the estimate provided herein and outside of "standard" project contingencies. This estimate does not include any potential "Tariff" related impact costs. We recommend the Developer/Client assess the project costs and apply an appropriate contingency

5 General Statement of Liability

5.1 Probable Costs and Ongoing Cost Control

Altus Group Limited does not guarantee that tenders or actual construction costs will not vary from this estimate. Acute market conditions, proprietary specifications, or competition/collaboration among contractors may cause tenders to vary from reasonable estimates based on normal and abnormal competitive conditions.

Altus Group Limited recommends the owner and/or design team review the cost estimate report including line item descriptions, unit prices, allowances, assumptions, exclusions, and contingencies to ensure the appropriate design intent has been accurately captured within the report.

It should be noted that the cost consultants are not qualified to confirm that construction work and design is in accordance with approved plans and specifications.

Details of our Client Data Policy can be found at www.altusgroup.com

6 Estimate Documentation

6.1 Documentation

Page Count	Description	Date Received
11	Fisheries Museum Altus Information	May 1, 2025
1	Project Description Altus	May 1, 2025
1	Sweeney Fisheries_Floor Plan_4302025	May 1, 2025
	Email correspondence	Various dates

7 Introduction

7.1 The following appendices are included with this report:

- A. Project Statistics
- B. Executive Summary
- C. Elemental Estimate Summary

Project Statistics

FUNCTIONAL AREA DETAILS

Floor Level / Description	Functional Area		%
	(m ²)	(sf)	
Renovation			
Museum Lobby	74	800	5.4%
Reception / Tourism Information Kiosk	65	700	4.7%
Multipurpose Room (incl. Storage)	204	2,200	14.9%
Exhibit Gallery #1	325	3,500	23.7%
Exhibit Gallery #2	251	2,700	18.3%
Children's Gallery	65	700	4.7%
Collection Storage, Prep and Archives	84	900	6.1%
Museum Admin- Level 1	28	300	2.0%
Museum Admin - Level 2	37	400	2.7%
Kitchen / Storage	46	500	3.4%
Loading / Shipping / Receiving	46	500	3.4%
Estimated Grossing Factor (12%)	147	1,584	10.7%
Total	1,373	14,784	100.0%

Executive Summary

\$10,945,000

PROJECT TOTAL

\$7,969 /m2

TOTAL /m2

\$740 /sf

TOTAL /sf

1,373 m2

14,784 sf

	Total Cost	\$ Total/m2	
		GFA	%
TOTAL CONSTRUCTION COST	7,803,690	5,682 /m2	71%
TOTAL SOFT COSTS	3,140,900	2,287 /m2	29%
TOTAL PROJECT COSTS	10,944,590	7,969 /m2	100%

\$3,141,000

PROJECT TOTAL

\$2,287 /m2

TOTAL /m2

\$212 /sf

TOTAL /sf

1,373 m2

14,784 sf

Element	Total Cost	\$ Total/m2	
		GFA	%
E FURNITURE & EQUIPMENT	166,900	122 /m2	5%
E1 Furniture	111,900	81 /m2	3.6%
E11 Office Furniture	110,000	80 /m2	3.5%
E12 General Staff Furniture	1,900	1 /m2	0.1%
E2 Equipment	55,000	40 /m2	1.8%
E21 AV Equipment	33,000	24 /m2	1.1%
E22 Computer Equipment	0	0 /m2	0.0%
E23 Security System and Monitor Room	22,000	16 /m2	0.7%
F PROJECT SOFT COSTS	1,184,000	862 /m2	38%
F1 Professional Fees	1,142,000	831 /m2	36.4%
F11 Project Management	656,000	478 /m2	20.9%
F12 Architect	273,000	199 /m2	8.7%
F13 Engineers & Consultants	164,000	119 /m2	5.2%
F14 Other Fees	49,000	36 /m2	1.6%
F2 Development Costs	42,000	31 /m2	1.3%
F21 Building Permits	17,000	12 /m2	0.5%
F22 Legal Fees	22,000	16 /m2	0.7%
F23 Third Party Commissioning	3,000	2 /m2	0.1%
Total Soft Costs (Excluding Contingencies)	1,350,900	984 /m2	43.0%
Z2 Contingencies	1,790,000	1,303 /m2	57.0%
Z21 Design and Pricing Contingency	0	0 /m2	0.0%
Z22 Escalation Contingency	0	0 /m2	0.0%
Z23 Construction Contingency	0	0 /m2	0.0%
Z24 Construction Phasing Contingency	0	0 /m2	0.0%
Z25 Acceleration/Overtime Contingency	0	0 /m2	0.0%
Z26 Permanent Exhibition Space	1,790,000	1,303 /m2	57.0%
Main Permanent Exhibition - \$1,550,000			
Children's gallery - \$140,000			
Orientation Film allowance- \$75,000			
Exhibit Move / Relocation - \$25,000			
Total Soft Costs (Including Contingencies)	3,140,900	2,287 /m2	100.0%
HST	0	0 /m2	0.0%
TOTAL SOFT COSTS	3,140,900	2,287 /m2	100%

Elemental Estimate Summary

PROJECT TOTAL

ELEMENTAL SUMMARY - RENOVATIONS

FISHERIES MUSEUM RENOVATION

\$5,682 /m2

1,373 m2

TOTAL /m2

\$528 /sf

14,784 sf

TOTAL /sf

Element	GFA Ratio	Element Quantity	Element Unit Rate	Cost Total	\$ Total/m2 GFA	%
A SHELL				549,391	400 /m2	7%
A1 Substructure				0	0 /m2	0.0%
A11 Foundations	0.00	m2	/m2	0	0 /m2	0.0%
A12 Basement Excavation	0.00	m3	/m2	0	0 /m2	0.0%
A2 Structure				0	0 /m2	0.0%
A21 Lowest Floor Construction	0.00	m2	/m2	0	0 /m2	0.0%
A22 Upper Floor Construction	0.00	m2	/m2	0	0 /m2	0.0%
A23 Roof Construction	0.00	m2	/m2	0	0 /m2	0.0%
A3 Exterior Envelope				549,391	400 /m2	7.0%
A31 Wall Below Grade	0.00	m2	/m2	0	0 /m2	0.0%
A32 Walls Above Grade (Exterior Façade Improvement)	1.00	1,373 m2	400.00 /m2	549,391	400 /m2	7.0%
A33 Windows & Entrances	0.00	m2	0.00 /m2	0	0 /m2	0.0%
A34 Roof Covering	0.00	m2	0.00 /m2	0	0 /m2	0.0%
A35 Projections	0.00	m2	0.00 /m2	0	0 /m2	0.0%
B INTERIOR				1,593,234	1,160 /m2	20%
B1 Partitions & Doors				618,065	450 /m2	7.9%
B11 Partitions	1.00	1,373 m2	350.00 /m2	480,717	350 /m2	6.2%
B12 Doors	1.00	1,373 m2	100.00 /m2	137,348	100 /m2	1.8%
B2 Finishes				700,474	510 /m2	9.0%
B21 Floor Finishes	1.00	1,373 m2	190.00 /m2	260,961	190 /m2	3.3%
B22 Ceiling Finishes	1.00	1,373 m2	220.00 /m2	302,165	220 /m2	3.9%
B23 Wall Finishes	1.00	1,373 m2	100.00 /m2	137,348	100 /m2	1.8%
B3 Fittings & Equipment				274,696	200 /m2	3.5%
B31 Fittings & Fixtures	1.00	1,373 m2	200.00 /m2	274,696	200 /m2	3.5%
B32 Equipment	1.00	1,373 m2	0.00 /m2	0	0 /m2	0.0%
B33 Conveying Systems	0.00	0 stop	0.00 /stop	0	0 /m2	0.0%
C SERVICES				1,819,858	1,325 /m2	23%
C1 Mechanical				858,424	625 /m2	11.0%
C11 Plumbing & Drainage	1.00	1,373 m2	195.00 /m2	267,828	195 /m2	3.4%
C12 Fire Protection	1.00	1,373 m2	50.00 /m2	68,674	50 /m2	0.9%
C13 HVAC	1.00	1,373 m2	350.00 /m2	480,717	350 /m2	6.2%
C14 Controls	1.00	1,373 m2	30.00 /m2	41,204	30 /m2	0.5%
C2 Electrical				961,435	700 /m2	12.3%
C21 Services & Distribution	1.00	1,373 m2	180.00 /m2	247,226	180 /m2	3.2%
C22 Lighting, Devices & Heating	1.00	1,373 m2	350.00 /m2	480,717	350 /m2	6.2%
C23 Systems & Ancillaries	1.00	1,373 m2	170.00 /m2	233,491	170 /m2	3.0%
D SITE & ANCILLARY WORK				673,004	490 /m2	9%
D2 Ancillary Work				673,004	490 /m2	8.6%
D21 Demolition	1.00	1,373 m2	450.00 /m2	618,065	450 /m2	7.9%
D22 Alterations	1.00	1,373 m2	40.00 /m2	54,939	40 /m2	0.7%
Net Construction Estimate				4,635,488	3,375 /m2	59.4%
Z GENERAL REQUIREMENTS & ALLOWANCES				834,388	608 /m2	11%
Z1 General Requirements & Fee				834,388	608 /m2	10.7%
Z11 General Requirements		15.0%		695,323	506 /m2	8.9%
Z12 Fee (Head office overheads & profit)		3.0%		139,065	101 /m2	1.8%
Total Construction Estimate (Excluding Contingencies)				5,469,876	3,983 /m2	70.1%
Z2 Contingencies				2,333,814	1,699 /m2	29.9%
Z21 Design and Pricing Contingency		20.0%		1,093,975	797 /m2	14.0%
Z22 Escalation Contingency		12.7%		692,851	504 /m2	8.9%
Z23 Construction Contingency		10.0%		546,988	398 /m2	7.0%
Z24 Construction Phasing Contingency		0.0%		0	0 /m2	0.0%
Z25 Acceleration/Overtime Contingency		0.0%		0	0 /m2	0.0%
Total Construction Estimate (Including Contingencies)				7,803,690	5,682 /m2	100.0%
HST		0.0%		0	0 /m2	0.0%
TOTAL CONSTRUCTION COST				7,803,690	5,682 /m2	100%

www.lord.



Making the World
a Better Place
Through Culture