

# BRISTOL BAY

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## REGIONAL BRANDING & MARKETING PLAN



**Developing Alaska Rural Tourism (DART) Program**  
[www.commerce.state.ak.us/oed/dart/home.htm](http://www.commerce.state.ak.us/oed/dart/home.htm)

Project sponsored by – State Department of Commerce, Community & Economic Development, and a grant from the US Economic Development Administration

Local partners include: Bristol Bay Native Corporation, Bristol Bay Native Association, Lake & Peninsula Borough, Bristol Bay Borough, Bristol Bay Visitors Council, Nushagak Mulchatna Wood Tikchik Land Trust

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# DEVELOPING ALASKA RURAL TOURISM: “DART” PROJECT OVERVIEW

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This document is a plan for developing tourism in the Bristol Bay region. It was prepared by representatives of the Bristol Bay businesses and regional organizations, including Bristol Bay Native Association, Bristol Bay Native Corporation, Bristol Bay Visitors Council, and the Lake and Peninsula Borough, working with Agnew::Beck Consulting.

The report was prepared in partnership with the State’s Developing Alaska Rural Tourism (DART) Program, which is sponsored in part through funds provided by the US Economic Development Administration.

The two most important results of this effort are a set of “pilot project” websites, and a business and marketing plan. The websites are designed to provide a tangible example of a web-based marketing strategy for small tourism businesses currently operating in Bristol Bay; the business plan places these specific websites in a larger marketing framework, and sets the stage for establishing a sustainable marketing organization.

Before describing the specifics of these products, the remainder of this introductory section gives an overview of the DART program.

DART represents an 18-month long partnership between the Alaska Department of Commerce, Community, and Economic Development (Commerce), the U.S. Department of Commerce’s Economic Development Administration, the Alaska Department of Fish & Game, and Alaska regional economic development organizations (ARDOR’s).

The project aims to utilize strategic partnerships to provide targeted technical assistance to these communities. Regions targeted for technical assistance within DART are located in rural, economically distressed geographical areas that have identified tourism development as an important piece of their regional economic development strategy.

Within Alaska, “mature destinations”, commonly visited by organized groups and less adventurous travelers, often act as gateways or portals for access to more undeveloped destinations. A successful tourism enterprise in one community often attracts pioneering tourists seeking “undiscovered” rustic destinations in adjacent communities, thus stimulating entrepreneurship and economic growth.

Numerous rural communities have expressed interest in developing culturally sensitive, environmentally responsible and sustainable visitor attractions and activities. Many, however, lack the resources and technical capability to accomplish their goals. Several rural areas have utilized DART to promote and develop their cultural tourism resources, Native arts and crafts sales, outdoor recreation and adventure travel, and wildlife viewing opportunities.

This 18-month project was initiated in November 2004 and has been extended until December 2006. The following are several outcomes to date:

- Completed a comprehensive tourism business and attraction inventory for Central Southeast (Petersburg, Wrangell, Coffman Cove), Copper Valley, Bethel, and Bering Straits region.

- Developed a “brand” or an identity for central southeast Alaska - Wrangell, Petersburg, and Coffman Cove - aimed at inducing travel to the region ([www.alaskarainforestisland.com](http://www.alaskarainforestisland.com)) - including a website and brochure..
- Completed “*A Profile of Visitors to Rural Alaska*” marketing research report to gain a greater understanding of visitors to rural Alaska. Four separate reports were conducted for Central Southeast, Western Alaska, Bering Strait, and the Copper River Valley.
- Conducted Internet marketing workshops in Nome and Glennallen and provided sponsorships for 18 students to attend the *Tourism in Rural Alaska* class offered through Prince William Sound Community College (PWSCC) in Glennallen. Some of the PWSCC students are now working in the visitor industry and some have developed a (tourism) business plan.
- Conducted several International Tourism Marketing workshops in conjunction with the Alaska Travel Industry Association (Girdwood, Fairbanks, Petersburg, Juneau, Palmer, and Valdez). Ninety small business owners were trained and 4 received scholarships to attend international trade shows (1 to German Speaking Europe, 3 to the Travel Industry Association International Powwow).
- Developed a new regional tourism website for the Greater Copper Valley Chamber of Commerce and for the Central Southeast Regional Partnership (CSERP) to provide regional visitor information and information on regional activities and attractions.
- Facilitated regional tourism stakeholder meetings in Nome, Petersburg, Dillingham, Bethel and St. Lawrence Island (Gambell and Savoonga). Meeting in Bethel featured a “cultural tourism” and “tour packaging” workshop for participants.
- Conducted a 2-day website development workshop in Nome/Bering Strait and Copper Valley region designed to provide tourism business owners with the skills necessary to create and maintain their own website.
- Conducted AlaskaHost Customer Service training seminars in Barrow, Bethel and Glennallen and trained 5 AlaskaHost Trainers to teach classes in Glennallen, Bethel, Prince of Wales, and Sitka.
- Conducted a “Write Your Own Business Plan” workshop (with the Alaska Small Business Development Center) – 40 participants attended from around the Y-K Delta; at least 5 have completed a business plan. Coached two individuals whose business plans were selected to compete for the AFN Alaska Marketplace grants in 2006.
- Presented a “Starting and Operating a Bed & Breakfast” workshop in Barrow and Bethel.
- Provided scholarships for several DART representatives to attend Alaska Travel Industry Association annual conference. It was the first time that Bethel & the Y-K Delta were represented at this important industry event.
- Alaska Department of Fish & Game designed and produced community wildlife viewing guides for Ketchikan, Sitka, Wrangell, Petersburg, Haines, Skagway, Juneau, Gustavus, and Prince of Wales Island, as part of the Alaska Coastal Wildlife Viewing Trail ([www.wildlifeviewing.alaska.gov](http://www.wildlifeviewing.alaska.gov)).
- Completed regional branding, marketing and tourism plans for the following areas: Copper Valley, Central Southeast (Wrangell, Petersburg, Coffman Cove) and Bristol Bay.

- June 2006 Birding Assessment Tour was commenced to develop new birding opportunities in the Y-K Delta. The tour invited renowned birding experts and utilized local guides (both paid and volunteer). Communities included – St. Marys, Quinhagak, Scammon Bay, and Chevak.
- Provided a start-up “Visit Bristol Bay” website showcasing a few locally-run businesses. This website is in its infancy but will only grow to accommodate more businesses, interested organizations and local agencies.

As Commerce begins wrapping up these initial DART projects, two consistent themes have emerged as key opportunities to improve prospects for rural Alaska tourism:

**I. Tourism Business Mentoring:** Entrepreneurs can benefit from working under the guidance of tourism and hospitality professionals already in the business, many of whom are willing to share their experience. Mentors should include Bed & Breakfast owners and operators, tour operators, fishing guides, artisans, restaurant/food service professionals, retail store owners, and transportation providers. Commerce will work with ARDORs and other partners to help provide support activities and mentoring to the entrepreneurial community to foster business growth and employment opportunities in the visitor industry.

**II. “Information Infrastructure”:** Several DART regions identified the need for better information about tourism attractions, services and businesses, as well as better stories about cultural and natural history. This category of improvement was labeled “information infrastructure” because it offers many of the benefits of traditional tourism infrastructure, e.g., trails and museums, but can be developed more quickly, and at a lower cost.

Two kinds of information are needed: marketing information to help attract people to the area, and information to improve the quality of the experience once they arrive.

Results from the 2006 research study “A Profile of Visitors to Rural Alaska” revealed that 75% of Rural Alaska visitors used the Internet to plan their vacation and 50% of those researched and booked portions of their trip on-line. Many businesses in rural Alaska with no website or Internet presence will find themselves at a major disadvantage in a competitive marketplace. Under the DART project, virtually all of the regions we are working with have identified improved marketing, in particular, better websites, as a key practical, cost-efficient action to attract more visitors.

The same report cited the need for improved visitor information as a concrete step to improve the visitor experience. Examples of proposed information improvements include roadside signs & kiosks, pullouts, viewing towers, boardwalks, website “virtual museums,” systems of roadside monuments keyed to CD’s or DVD’s, brochures, maps and a wide array of other interpretative materials. Information needs to be offered at regional airports, ferry terminals, in visitor centers, as well as along roads and trails and on the internet. In the Copper River area, for example, this kind of information infrastructure could create reasons for the 75% of visitors who are “just driving through” to slow down and spend time and money in the region. This could be done with a relatively modest investment, by capitalizing on the stories, businesses, and features that already are present in the area, but currently are missed by those passing through. A well designed visitor information infrastructure program holds great potential to build brand awareness and encourage visitors to stay longer and spend more money within rural and Bush Alaska.

# ■ INTRODUCTION

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## **Project Background & Purpose**

This document is a plan for developing tourism in the Bristol Bay region of Southwest Alaska. The map on the following page shows the general area addressed by the project.

This plan was prepared by Agnew::Beck Consulting, working with representatives of this region. The primary partner was the Bristol Bay Visitors Council, a group of regional organizations, agencies and businesses with an interest in tourism development in the region. This project is sponsored in part through funds provided by the U.S. Economic Development Administration and Alaska Department of Commerce, Community and Economic Development’s “Developing Alaska’s Rural Tourism” (DART) program.

The overall goal of the project is to help local residents and businesses find ways to expand tourism in the region, while guiding growth to limit possible adverse affects of tourism development.

## **Project Background & Purpose**

Bristol Bay has an international reputation as a world-class angling destination, and over 150 fishing and hunting lodges and camps are located in the region. The region also is well known for its bear viewing, and to a lesser extent, the opportunities for hiking and wildlife viewing along its rivers and in State and National Parks and Refuges.

The great challenge for Bristol Bay has been the fact that the large majority of the regional tourism businesses are owned and operated by people from outside the region. For example, over 90% of the Commercial Use Permits issued by the Park Service in the region are held by parties from outside Bristol Bay. The limited participation by local residents in the region’s lucrative tourism sector reflects several factors. The most important is the region’s focus on commercial fishing, which pays well and overlaps the tourism season. Other issues include the lack of people with the requisite job skills, a traditional antipathy towards tourism in the region (particularly towards sport hunting and fishing), and the lack of tourism “infrastructure,” including village based lodging, affordable transportation, and cooperative marketing.

This situation has begun changing in recent years, prompted in part by the continued challenges facing the region’s commercial fishing industry. Village corporations have begun to lease land for fishing and hunting camps and lodges. Several enterprising local individuals have begun tourism businesses, including fishing and hunting services, B&B’s, a flight service, and a walrus tour.

Over the years a range of tourism-related initiatives have taken place, with the goal of bringing more local benefits from tourism to Bristol Bay residents. Sponsors included Bristol Bay Native Association (BBNA), Southwest Alaska Municipal Conference (SWAMC), the Lake and Peninsula Borough (LPB), Bristol Bay Native Corporation (BBNC), and the Bristol Bay Visitors Council (BBVC). Examples of such programs include conferences and work-sessions on

subjects such as tourism trends, starting a tourism business, marketing, and starting a B&B. Another category of work has included efforts to develop cultural and tourism information centers in Dillingham and in Iliamna.

One particular tourism-related success is the Nushagak cooperative river management program, sponsored by Dillingham-based Choggiung, Ltd and carried out by the four Nushagak river villages. The large majority of land along the Nushagak River is held by Village Corporations. In the past, commercial operators and individual users have freely trespassed on this property. Under the river management program, commercial operators and individuals now pay to use land, on a daily or seasonal basis. The program puts field staff onto the river to monitor compliance. The program guides the location of commercial fishing along the Nushagak, and creates local jobs, revenue to the corporations and reduces conflicts between sport fishing, subsistence and local life.

This DART project builds from the successes (and failures) of these past initiatives. Based on this input, this effort focuses on three main objectives:

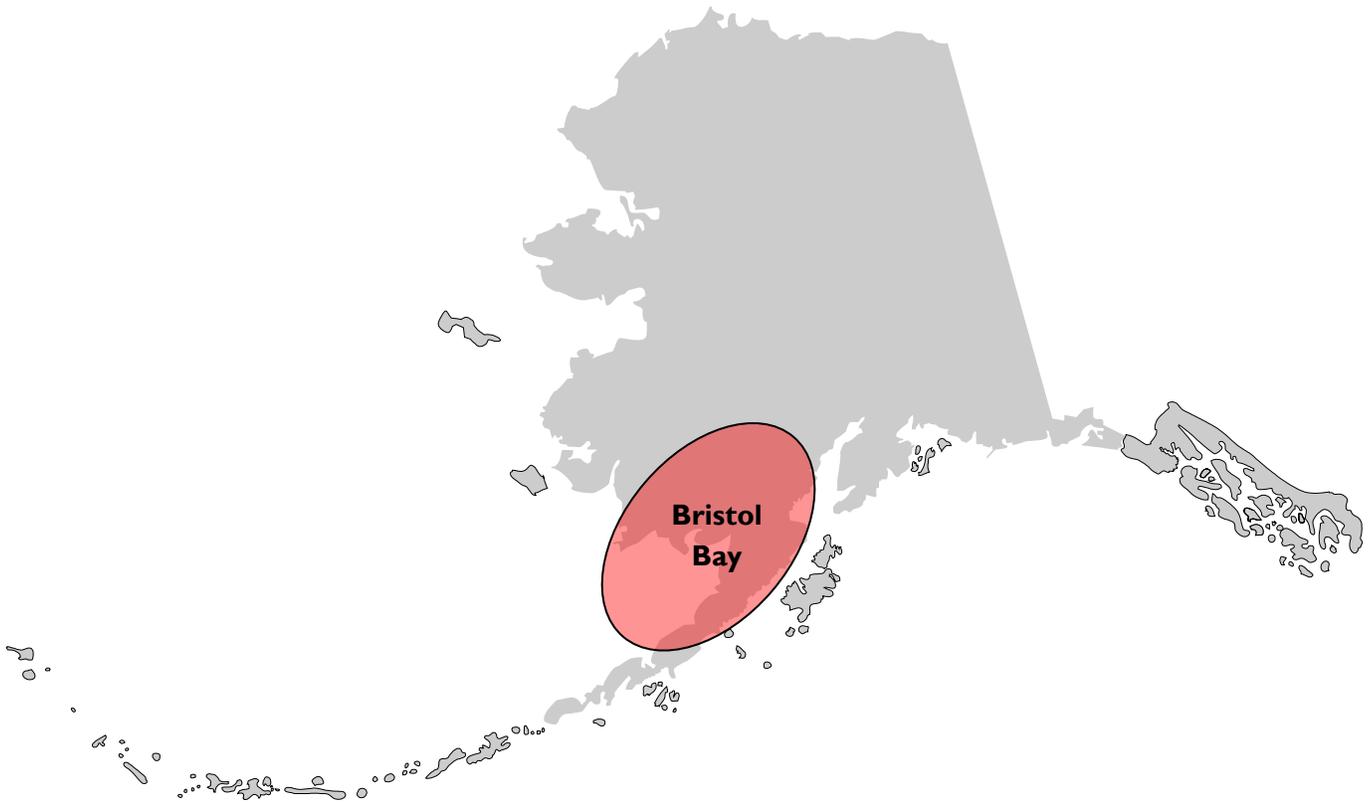
1. Provide direct assistance to individual, locally-owned businesses, both to help these businesses, and with the goal of creating models of success that will inform and inspire other Bristol Bay residents. The particular form of support offered was helping to establish a set of small business websites.
2. Develop cooperative marketing programs and a regional “branding program.” Specifically, local and regional organizations and businesses should work together to develop a coordinated plan to improve marketing for tourism, locally produced arts and crafts sales and commercial fish. This cooperative approach is possible because of the commonalities in stories about each category of product. The result of this effort will allow individual businesses to have greater odds of attracting clients and being successful.
3. Bring more partners into the effort to grow tourism. BBNC is already helping with this tourism initiative, working through the Bristol Bay Visitors Council. Other existing partners include BBNA, local Chambers of Commerce, village organizations, the Nushagak Mulchatna Wood Tikchik Land Trust. The Bristol Bay Visitors Council will take the lead on bringing these groups together.

The main recommendations of this report were developed at a workshop organized by Bristol Bay Native Association. The workshop, entitled “Bristol Bay Economic Action Summit,” held March 22 and 23 in Dillingham, included a set of meetings on tourism issues.

In contrast to the Copper River Valley, Central Southeast and other DART projects, where DART-sponsored workshops and other work have been underway for last two years, the DART project only began focusing on Bristol Bay in Spring, 2006. As a result, this report presents ideas that will require further review and refinement. The important two next steps in this project are the Nunamta Partnership meetings planned for August, 2006 in New Stuyahok, and a BBVC meeting in September in King Salmon. These meetings will be used to share results to date, to gain new partners, and solidify plans to move ahead with the action plan presented in the latter half of this report.

## Project Area

This project covers the Bristol Bay area of Southwest Alaska. The map below shows the general location of this huge region, which covers over 18 million acres. The Bristol Bay region extends from the Togiak National Wildlife Refuge (NWR) in the northwest, east to Lake Clark National Park, and south to nearly the end of the Alaska Peninsula. Within this region are two boroughs (Bristol Bay Borough and Lake and Peninsula Borough), and more than 25 villages. The two largest communities in the region are Dillingham, on the west side at Nushagak Bay, and King Salmon/Naknek on the east side at Kvichak Bay .



# PROJECT CONTEXT

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This section provides a summary of the context for developing tourism in the Bristol Bay region. Information in this section comes from a combination of research by the consultant, visitor survey data compiled by the McDowell Group as part of the DART project, and information gathered over several workshops, including a Spring 2006 workshop held as part of this project.

## I. ATTRACTIONS ANALYSIS

### Summary

#### *Strengths*

- Abundant wildlife (50,000,000 salmon – the largest red salmon run in world; 25,000 walrus; 10,000 brown bears)
- Spectacular National and State Parks and Refuges – Katmai, Lake Clark, Wood-Tikchik, Togiak, Becharof, Alaska Peninsula, Aniakchak, Walrus Islands
- Three distinct Native cultural traditions and a rich complex history
- Unique commercial and subsistence fishing traditions and history
- Unique landscape: unspoiled wilderness, intact ecosystems, features from volcanoes to tidewater glaciers,
- Intact cultural traditions, interesting small villages scattered through the wilderness
- Fishing and hunting lodges

#### *Challenges*

- Access to the region – visitors must make a significant financial and time investment to reach Bristol Bay hub communities
- Access within the region – after reaching Bristol Bay, visitors must then spend further time and money to get to specific region destinations  
(For example – airfare for one round trip ticket from Anchorage to Dillingham runs from \$300-\$500; a round trip flight to a surrounding village, say New Stuyahok, is an additional \$160)
- Competition – there are many other attractive natural areas and villages in Alaska, with good scenery, fishing, and amenities similar to Bristol Bay.
- Lack of developed facilities: tours, lodging, museums. Particular problems include the lack of quality in-village lodging, and the lack of local residents with job skills to work in the tourism industry (e.g., fly fishing guides, natural history guides)
- Poor pay for tourism work, particularly in contrast with summer commercial fishing or contract construction jobs; conflict with traditional ways of life
- Lack of name recognition/Off the beaten track – while the area is well known to serious anglers, and Brooks Camp bears have a decent reputation, Bristol Bay has no “first tier”

attractions (e.g., Glacier Bay, Denali National Parks – “must-see” destinations with existing national and international reputations)

- Lack of coordinated regional marketing organization, or marketing plan
- Issue of “selling” cultural resources

### **Review of the region’s greatest strengths as a destination**

Information below is based on a synthesis of several past research efforts. A large portion of this section came from work by Terry Johnson, of the Alaska Marine Advisory Program. This text will be used in the future as part of marketing information and the planned Bristol Bay regional marketing website.

#### **A. Abundant Wildlife** – viewing, photography; fishing and hunting.

##### **Land Animals**

Nearly every part of the Bristol Bay region is rich in wildlife. Tundra, uplands and river valleys are home to bears, caribou, moose, wolf, fox, coyote, beaver, otter, tree squirrel, ground squirrel, porcupine, hares, marmot, mink and wolverine. Because of the area’s extensive protected areas, small population, and limited road system, the region has one North America’s largest, most diverse intact ecosystems. Salmon are the underlying driver of this natural world, transferring the riches of ocean into upland through migration of as many as 50 million fish.

**Brown (grizzly) bears** prowl every part of the Bristol Bay region, and are especially numerous on the east side and Alaska Peninsula. About 10,000 coastal browns inhabit the region, making them more numerous than people. Black bears are creatures of the forests and live in the foothills of the upper Nushagak watershed. Both types of bears are most easily spotted along streams during the salmon runs. Browns also can be seen patrolling seashore beaches, or feeding on ground squirrels and vegetation on open hillsides.



**Caribou** are animals of the tundra and open spaces, although they also occur in the foothill spruce forests. They are especially abundant in the hills around the Nushagak and Mulchatna rivers, where the Mulchatna herd (actually, dozens of small groups of animals) has grown to more than 200,000. The smaller Alaska Peninsula herd on the east side of the Bay has about 15,000 animals.

**Moose** prefer ponds and river bottoms, and are found throughout the region wherever cover and feed are sufficient. Moose tend to stick to areas of dense vegetation and are most often spotted at dawn and dusk. The low-lying terrain between the mouths of the Nushagak and Kvichak rivers is particularly valuable habitat. People traveling by skiff or raft often see them by riverbanks, and they are easy to spot from low-flying aircraft.

## Marine Mammals

Coastal shores host spotted and harbor seals, and Steller sea lions. Walrus haul out at Round Island, which can be reached by boat, and Cape Peirce. Access to Cape Peirce is by either boat or chartered floatplane but in either case a long hike is required to get a good look at the animals. Beluga whales are abundant in Kvichak Bay and Nushagak Bay, and often can be seen (and heard) from the shore in places like Dillingham and Naknek. Harbor porpoise, Dalls porpoise and killer (orca) whales travel the near-shore waters, although none are numerous in Bristol Bay. In the spring thousands of California gray whales transit the Bristol Bay coast on their migration to summer feeding grounds around the Bering Strait. Most of the grays are gone by the time summer visitors arrive, but a few linger in the area and sometimes can be seen from beaches. Humpback and fin whales are numerous on the Gulf of Alaska side of the Alaska Peninsula. Sea otters are found in the coastal waters of the Gulf of Alaska, and river otters occur on freshwater systems throughout the region.



A final, unique “marine mammal” are the fresh water seals that live year round in Lake Iliamna.

## Birdlife

Rocky shorelines, particularly in the Togiak Bay area and on the Cook Inlet and Shelikof Strait shores, host a diversity of seabirds. Horned and tufted puffins, common murres, black-legged kittiwakes, cormorants, and various auklets use the rocky shorelines and islands for nesting. About a million kittiwakes and murres nest on rookeries at Cape Newenham, Cape Peirce, Bird Rock, Shaiak Island, and Black Rock. Gulls, terns, turnstones, and phalaropes, and other shore birds nest in sandy and grassy habitats throughout Bristol Bay’s coastal areas. Species of ducks, geese, and other migratory waterfowl either nest on or near ponds and lakes in the region, or pass through during annual migration. Flocks of sandhill cranes grace Bristol Bay’s tundra hillsides in spring and fall as they stop over to rest and feed on their journeys north and south. Tundra swans pair up and nest in ponds. Bald eagles, gyrfalcons, peregrine falcons, osprey, jaegers, rough-legged hawks, and snowy and barred owls are among the many raptors that soar over Bristol Bay’s hills and flats.



## Fish

Bristol Bay has a world-wide reputation for sport fishing. Five species of Pacific salmon can be found in the regions freshwaters, as well as, rainbow trout, Dolly Varden, arctic char, and grayling. Lake trout (lake char) are caught in many of the larger and deeper lakes, and northern pike are abundant in the shallow margins of lakes and in many river sloughs. There are over 150 fishing lodges and camps in Bristol Bay.

Alaska Department of Fish and Game classifies most of the region’s freshwater systems as part of the state’s “Wild Trout Area.” This means that no hatchery-raised or non-indigenous trout live there. It also means that special regulations apply that are intended to preserve the population, distribution and size composition of the trout stocks. Many waters are catch-and-release only, and large areas are restricted to single-hook, non-baited artificial lures or flies.

Among the most famous angling rivers in the area are the Kanektok, Goodnews, the Nushagak-Mulchatna and Nuyakuk drainages, including Wood-Tikchik lakes and rivers. On a catch-per-angler basis, the lower Nushagak River in late June and early July has some of the best king salmon fishing in the country. The Newhalen River, which flows into Lake Iliamna, and the Kvichak River, which flows out, provide extraordinary fly- and light-tackle fishing for sockeye salmon during the summer run. The upper Kvichak, along with its tributary Lower Talarik Creek, are famous for producing large rainbows (ten pounds and up), especially in late summer and fall. The Alagnak (or Branch) River is renowned for salmon and trout, and the Naknek River between King Salmon and Naknek Lake also produces big rainbows and king salmon. Brooks River, pictured at right, is famous both for bears and for rainbow trout fishing.



## **B. Cultural Attractions**

Cultural attractions include Eskimo, Aleut and Indian traditional practices, handicrafts, and performances of song and dance. Bristol Bay is also rich in history from the Russian period, and has a strong contemporary culture based on the salmon fishery and fish processing.

**Cultural Experiences** – Bristol Bay offers relatively few structured ways to learn about the area’s diverse cultures and history. For those with a guide or a spirit of adventure, visits to the region’s 30 plus communities offer a chance to directly experience this unique region, including a chance to hear Native languages, observe village life, “take a steam” and purchase arts and crafts. Walrus ivory carving, fur and skin sewn clothing, Eskimo dolls, Yup’ik masks and woven grass baskets are some of the traditional crafts available from area artists. Approximately half of the Bristol Bay villages have lodges or B&Bs providing a place to stay, which are also good starting points for learning about when and how to visit a village.

In addition, throughout the region the perceptive visitor can identify sites where villages and fish camps once stood, although few are developed as tourist attractions. Many of these sites have been occupied more-or-less continuously for 2,500 years. Nearly every contemporary village is built on or close to an ancient village site. Nearly every bay with a salmon stream, or with a protected anchorage close to a gathering point for marine mammals, had at least a seasonal camp. Barabara (pit house) pits are clearly visible at such sites throughout the region, and in some places stone fish traps, cairns, and other structures can be found.



**Cultural Facilities** – Brooks Camp has a reconstructed pit house; museums include the Bristol Bay Historical Museum in Naknek and the Samuel K. Fox Museum in Dillingham; the Peter Pan Cannery in Dillingham conducts daily cannery tours during the salmon processing season; many small Orthodox churches serve Native communities, and some of these are listed on the National Register of Historic Places.

Visitors interested in traveling to learn about the cultures of Bristol Bay need to be respectful of the privacy of local residents and sensitive to the fact that these are living communities. Prospective visitors not familiar with the region can often work through the place they are staying to better understand how best to have a rewarding experience, and how to avoid disrupting local lives.

### **C. Landscape, Parks, Preserves, Refuges**

The Bristol Bay landscape includes mountains, lakes, rivers and the national and state parks, wildlife refuges, designated wilderness areas and other administrative units that protect, feature and enhance enjoyment of those attractions. These lands and waters offer superlative hiking, camping, rafting, kayaking and canoeing.

Protected public lands encompass more than 15 million acres, including two national parks, three national wildlife refuges, two state game sanctuaries, several national wild and scenic rivers, and the nation’s largest state park. These units highlight scenic natural wonders. Millions more acres are in less-protected state, federal and Native corporation status but remain *de facto* wilderness. Following is a list of key locations, starting in the north and moving clockwise through the region:



Lake Clark National Park and Preserve  
Katmai National Park and Preserve  
Becharof National Wildlife Refuge  
Alaska Peninsula National Wildlife Refuge

Aniakchak National Park  
Walrus Islands State Game Refuge  
Togiak National Wildlife Refuge  
Wood Tikchik State Park

Some of the remarkable natural features found in the Bristol Bay region include the freshwater fiords of Wood Tikchik State Park, volcanoes that dot the coastal ranges, tidewater glaciers, and the Lake Iliamna, the state’s largest.



## 2. MARKET TRENDS – WESTERN ALASKA

The Alaska Traveler Survey<sup>1</sup> was recently completed for Western Alaska, focused on independent (non-cruise/non-package) visitors to this huge region. The area covered includes all of Bristol Bay, as well as the Aleutian Islands and the Yukon Kuskokwim delta. This section summarizes results from that survey<sup>2</sup>. Highlights of these findings include:

- Fishing remains the region's number one draw, but visitors find time for many other activities once they arrive
- Western Alaska has great fishing, and many other satisfying attractions. Visitors love their trips to the region; a remarkable 91% said they were very satisfied with their visit
- Satisfaction with the experience leads to a very high return rate; over 40% are repeat visitors, more than double the state average
- 72% of visitors used the internet to plan their trips, making the internet the most important way visitors learn about potential visitor services. Word-of-mouth ranks second.

### Motivator and Primary Activity

Sport fishing has historically been the top motivator for visitors to travel to destinations in Western Alaska. The Alaska Visitor Statistics Programs 1-3 (1985, 1989 and 1993) consistently showed fishing as the region's most popular visitor activity. The Alaska Travelers Survey profiling visitors to Western Alaska published in March of 2006 shows the trend has not changed; fishing was the top draw luring visitors to this region. Interest in wildlife viewing, bear viewing in particular, has grown in importance over the years and now is the second most important motivator.

#### Top motivations to visit Western Alaska

Fishing	59%
Wildlife	22%
Visiting Friends and Family	21%
Bear Viewing	19%

### Clues about Traveler's Interests

Many in Western Alaska believe that visitors whose primary interest is fishing *only* want to fish. The theory is that the single-minded pursuit of fish is the only motivator for travel and therefore no other attractions will or can compete. The evidence consistently shows that while fishing is the area's primary draw, anglers are interested in other activities. For example, while only 18% chose to visit the region because of bear viewing, 41% of visitors take part in bear viewing once they arrive. In the Bristol Bay area, this commonly occurs when anglers take a break from fishing to fly to popular bear viewing areas at Brooks Camp or the outer Katmai coast. In addition, according to interviews with regional lodge

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<sup>1</sup> A Profile of Visitors to Rural Alaska and the Western Alaska Region, McDowell Group, February, 2006

<sup>2</sup> This study does not provide information on in-state visitors to the region. This segment, while smaller than the out of state travelers, is also important to the area's visitor economy. Business travelers are the most significant component of in-state travel in the region, helping to keep open lodges, restaurants and stores both in the regional hub communities and smaller villages.

operators, many of their clients are quite interested in learning about Bristol Bay cultural traditions. Lodge operators said they would take advantage of village tours, arts and crafts demonstrations, and arts and crafts sales if these were reliable, quality offerings. Another fact captured in the Visitor Profile is that while people come to Alaska to fish, they take time to engage in other types of activities during their trip: visitors to Western Alaska stay 6.8 nights in the region but they also average 12.9 nights in Alaska. Clearly they have the time, interest and money to see additional attractions.

Marketing non-fishing attractions to anglers (and bear viewers) already visiting the region provides significant potential for increasing revenues and business opportunities in the region. While other Bristol Bay attractions – cultural attractions, scenery, viewing caribou or walrus - may not justify the high cost of travel to the region as fishing and bear viewing do, there are thousands of fishers and bear viewers who can be encouraged to stay longer if they are presented with appealing attractions.

### **How Visitors Find Western Alaska**

39% of visitors to Western Alaska have visited the region before, more than double the average return rate statewide. This is a clear testament to the quality of fishing and is evidence that area lodges are meeting the needs of the clients. According to visitor satisfaction ratings, 91% of visitors stated they were very satisfied with their experience and the remaining 9% were satisfied. Not even one percent of visitors said they were neutral, dissatisfied or very dissatisfied. Past visitors are therefore likely to recruit new visitors to the region through good word-of-mouth advertising.

72% of visitors to the region used the Internet to gather information about the region and specific products and services. This fact should make Internet site design and optimization a top priority for the region and individual entrepreneurs. Currently most visitors are gathering information on the Internet but few are making purchases beyond airfare on the Internet. One explanation is that visitors to an off-the-beaten path location like Bristol Bay want the relative security of having talked to a live person prior to booking a lodge or tour.

### **Visitor Expenditures**

Western Alaska Visitors spend an average of \$2,272 in the region during their average 6.8 nights. Visitor expenditures in the region are much higher than those of the average Alaskan visitor. Bristol Bay includes some well known, famous lodges that charge much higher rates – as much as \$5000-6000 for a week at a high-end, fly-in/fly-out fishing experience. However, since the survey shows 80% of visitors are fishing, and the average expenditure for a week visit is \$2,272, most fishing and lodging expenditures are below this average, and therefore much lower than is sometimes assumed.

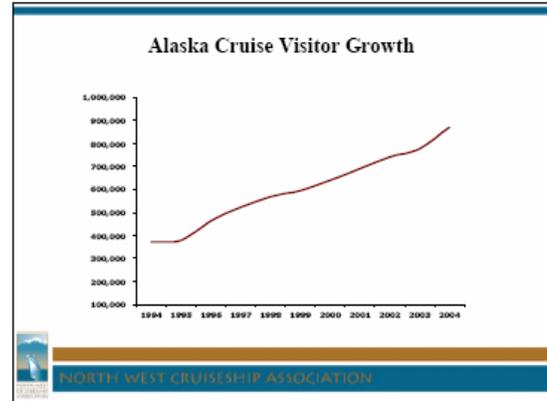
### **Visitor Origin & Travel Mode**

The list below shows the percentage of travelers to Western Alaska from different geographic areas. Most visitors are from the Western US, which means promotions focused on the West Coast will be most fruitful. Many casual observers would assume that international visitors are

a larger part of the market because foreign visitors are so identifiable, but as the figure shows international visitors make up only a small slice of travelers to the region.

Western U.S.	62%	Midwest U.S.	9%
Southern U.S.	15%	International	5%
Eastern U.S.	9%		

90% of the visitors to Western Alaska traveled to Alaska by air. 4% traveled on cruise ships and 4% via highway. The limited number of cruise visitors to the region is significant because cruise travel is the largest and fastest growing segment of all out-of-state travel to Alaska, increasing from about 35% to over 50% of all out-of-state visitors. Western Alaska has largely missed out on this most rapidly expanding sector of Alaska tourism.



**Visitor Demographics**

*Gender:*

80% of the visitors to Western Alaska are male, compared to just over 50% statewide. This is likely explained by the high percentage of men participating in sportfishing. This also shows the potential to attract more women to the region, both women anglers, and female partners of anglers who would visit if they knew there were interesting activities to be found.

*Age & Party Size:*

The average age for travelers to the region is 48 and the average party size is 2.8 people; making the average age a bit younger, and the average party size a slightly greater than statewide averages.

*Education and Household Income:*

63% of visitors to the region have obtained at least a college degree. The mean income is \$108,500. Clearly visitors to the region are educated and affluent.

**Observations from other data sources**

As part of this project, other sources of tourism information were reviewed, including past Alaska Visitor Statistics Program (AVSP) surveys, Census Data, and studies related to specific tourism issues in Dillingham, the Lake and Peninsula & Bristol Bay Boroughs. In addition, information was synthesized from previous Agnew::Beck tourism work in the region. Findings from this work include:

*Prospects for Ecotourism, Cultural Tourism*

The survey of resident preferences for tourism growth (in the following section) calls for more hiking and wildlife viewing and culture tours and less sport hunting and unguided sport fishing. Previous AVSP satisfaction ratings for the Western region provide some clues about prospects for these activities.

Native Cultural Presentations and Cultural Attractions/Museums are rated the lowest for Western Alaska of all regions in Alaska. This reflects the current lack of cultural centers and organized cultural tours in the region. While significant investment might be able to raise the rates the base data on expenditures for native art and the ratings for this category suggest that this might be a big hill to climb.

Hiking does rate high for satisfaction in Western Alaska. However few visitors list hiking as a major motivator for travel to the region which suggests that hiking is an important secondary activity. The region does offer several well known hikes, including the hike into the Valley of 10,000 Smokes in Katmai National Park, and the hikes in the Twin Lakes area of Lake Clark National Park.

Bears – Bear viewing is well established in the area, and has great potential, as we know 41% of visitors to the region do it. More sites where bears can be seen with some confidence would attract additional visitors.

Walrus – Round Island and other locations along the coast near Togiak are slowly gaining a national reputation for high quality walrus viewing (as well as the chance to see many other creatures). The infrastructure to reach this area is also slowly improving. Walrus viewing offers a unique attraction, and one that can be used to help create a more distinctive brand for the region. As is the case with bears, there is a need to simplify the logistics and improve the facilities and capacity for visitation before this market will be able to significantly expand.

Birding – The numbers of birders willing to pay high prices is very small. Many major birding destinations are seeing a decline in their numbers.

Rafting and Kayaking – There are a great number of rafting and kayak adventures that could attract additional visitors in the region. The lakes of Katmai NP and Wood Tikchik State Park offer excellent kayaking. Rafting options include upper reaches of the Nushagak River, the Togiak River and other rivers in the Togiak Wildlife Refuge. The float out of the Aniakchak caldera is a particularly unique trip. When combined with fishing, hiking and wildlife viewing this activity hold real promise of delivering more travelers to Bristol Bay.

### **3. COMMUNITY VIEWS**

Local views about Bristol Bay tourism have traditionally been neutral to negative. Residents have understandably seen tourism as synonymous with fishing and hunting, and viewed both these activities as threats to local commercial fishing and subsistence. In addition, the idea of fishing or hunting for sport doesn't sit well with people who place great cultural significance on subsistence life. Many people view catch and release fishing, for example, as an act of disrespect, rather than a strategy for sustainable fishing.

Views about tourism have slowly evolved over the last 10 to 15 years. The continued weakness of the commercial fishing industry has created an incentive for residents to be more open to tourism as an alternative way to make a living in Bristol Bay. Three times in the last ten years an informal survey on tourism issues was conducted by Agnew::Beck at the

BBNC annual village leaders meeting. The chart below shows results from the December 2005 survey. As the chart shows, there is strong support for non-consumptive forms of tourism such as wildlife viewing and cultural tourism. And a significant percentage of local residents and village organizations are open to sport fishing, if this occurs in a way that creates local economic benefits, and doesn't bring in large volumes of un-guided anglers.

### **Bristol Bay Tourism - How Much In The Future, Compared To Today?**

(table shows percentage of 80 participants who responded in each category)

	<b>A lot more</b>	<b>A bit more</b>	<b>Same as today</b>	<b>A little less</b>	<b>A lot less</b>
Guided sport fishing?	23%	16%	30%	14%	16%
Unguided sport fishing?	8%	13%	21%	16%	42%
Sport hunting?	0%	9%	26%	18%	47%
Ecotourism (e.g., wildlife viewing, hiking, boating)?	52%	23%	23%	0%	2%
Culture-Based Tourism (e.g., museums, tours)?	68%	29%	4%	0%	0%

Between 1996 & 2005, support for increases in sport hunting dropped to zero. Support for unguided sport fishing has dropped slightly (from 25% to 22% who want to see a lot or a little more of this activity). Support for guided sport fishing has grown in this same period (25% today want to see a lot more, as compared with 17% in 1996.) Over half of respondents want to see "a lot more" of ecotourism, although the percentage of respondents in this category has decreased slightly, from 58% in 1996 to 52% in 2005. Support remains very strong for cultural tourism.

Over the last several years, the Bristol Bay area has made big strides to respond to the challenges and opportunities facing the region. Some of the key projects and programs recently completed or in progress that set the context for this proposal are listed below:

- BBVC – creation of a regional forum for sharing information on tourism issues, and working on projects of common interest
- Completion of individual village comprehensive plans – virtually every community has identified expansion of entrepreneurial opportunities as a priority, particularly related to tourism
- Nushagak River Patrol – an innovative, very successful cooperative venture among four village corporations to control hunting and fishing camps and activities on land along the Nushagak River. Benefits of this program include creating jobs with the river patrol, revenues to villages, and opportunities to provide support services, including fuel sales and skiff rentals.
- Nushagak Mulchatna Wood Tikchik Land Trust – a well funded, well managed initiative to protect the integrity of the watershed. This initiative, along with the river patrol, gives the area the potential to protect resources and manage tourism growth to a unique degree, and also to capitalize on this progressive management in branding the region to discerning travelers.
- Marketing Initiatives – *covered in the following section*

## 4. CURRENT MARKETING EFFORTS

Marketing in Bristol Bay can be described from either the “glass half empty” or “glass half full” perspective. Compared to much of Alaska – for example, the Matanuska-Susitna, Kenai, Kodiak and Southeast regions – Bristol Bay undertakes minimal marketing activities. There is no organized regional cooperative marketing organization. The fishing lodges that make up the region’s dominant existing tourism businesses are largely owned and operated by entities from outside the region, and do not cooperate in marketing fishing, nor do they work to market the region as a whole. Terry Johnson, who runs a walrus tour near Togiak, has said the lack of support for cooperative marketing remains one of the top challenges for sustaining his business.

On a more positive note, the region does have a national reputation among serious anglers as a premier fishing destination. Likewise the bears at Brooks Camp are relatively well known. While rarely labeled as being in Bristol Bay, the image of bears fishing at the falls on Brooks River is seen in hundreds of contexts. Neither of these attractions, however, have the same brand image or reputation as Alaska’s best known destinations, such as Denali, Glacier Bay, Skagway or even Nome. Working to develop a stronger “brand image” is a key step in marketing the region.

Current marketing activities in the region, in addition to the efforts of individual businesses, are summarized below:

- Dillingham Chamber – website, brochure <http://www.dillinghamak.com/>
- Bristol Bay Native Association – information on travel opportunities, hidden in the Early Learning section of the BBNA web site <http://www.bbna.com/EarlyLearning/villages.asp>
- Lake and Peninsula Borough; Naknek/King Salmon Chamber of Commerce - recently completed and attractive brochure focused on Lake and Peninsula travel opportunities with some information on the region as a whole, and an associated website <http://www.lakeandpen.com>
- Bristol Bay Borough – tourism website, at [www.visitbristolbay.com](http://www.visitbristolbay.com)
- Bristol Bay Visitors Council – carried out several regional marketing initiatives, including preparing a tourism brochure focused on Yupik masks, and work with travel writers
- Southwest Alaska Municipal Conference (SWAMC) – website with tourism information <http://www.southwestalaska.com/bristol/index.html>
  
- In addition, as is discussed below, a new travel site has been developed as part of this project <http://www.visitbristolbay.org> (Note: the difference between this site and the Bristol Bay Borough site is .org vs. .com.)

# SUMMARY OF TOURISM GOALS AND STRATEGIES

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## Context – Bristol Bay Tourism Today

- *Attractions* Bristol Bay has an unusually rich mix of visitor attractions, in particular: fishing, wildlife viewing (the best bear and walrus viewing sites in Alaska), three distinct Native cultural traditions, and noteworthy State and National Parks and Refuges.
- *Infrastructure and Services* The region has many high quality fishing and hunting lodges; however, other than lodging in Dillingham and King Salmon, villages offer very limited accommodations. Also, other than for fishing, Bristol Bay also has almost no structured tours or guide services to make it easy for visitors to enjoy the area’s attractions.
- *Market Trends* Bristol Bay remains a very popular sport fishing and hunting destination, but is well off the main pipeline of Alaska tourism, and receives almost none of the cruise segment of the marketplace, the largest and fastest growing segment of the Bristol Bay economy.
- *Community Views:* As described above, most Bristol Bay residents have seen tourism as an activity that competes with locals for fish and game and leaves behind few local benefits. However, interest in tourism has grown in recent years, particularly as commercial fishing has floundered. Regional support for tourism is strongest for “non-consumptive” activities like wildlife viewing, eco-tourism, cultural tourism and guided sport fishing.

## Overall Goals for Tourism (Based on work by the Bristol Bay Visitors Council)

- Use tourism to help diversify and expand the region’s economy, by attracting more visitors, increasing the length of visitor stays, and increasing spending per visitor
- Increase the local benefits of tourism; encourage tourism that supports locally-owned businesses and provides good jobs for residents
- Focus on forms of tourism that maintain the health of the region’s natural environment, fish and wildlife, and communities and cultural traditions
- Provide local residents and businesses more control over tourism growth; keep people informed and involved in tourism decisions

## Regional Tourism Strategies

- Strategy 1: Define Target Markets and Activities
  - Markets and activities with greatest local benefits and that help maintain the region’s health, including wildlife viewing, cultural tourism and adventure tourism
- Strategy 2: Improve Attractions, Access & Information
  - Near Term*
    - Travel itineraries linking multiple Bristol Bay attractions
    - Website with a “virtual tour” of the region
  - Longer Term*
    - Better lodging in villages
    - Guided tours

- Lower regional transportation costs (e.g. a “eurail pass” on local planes)
  - A system of cultural centers; this effort is currently focused on the Harvey Samuelson Center in Dillingham
- Strategy 3: Support to Existing and Potential Tourism Businesses
    - Near Term*
      - “Pilot project” for individual business websites
      - Regional “portal” website
    - Longer Term*
      - Improved regional marketing (see below)
      - Micro-loan program
      - Training & mentoring programs
      - Business partnerships
      - Support for arts and crafts
- Strategy 4: Cooperative Marketing - develop and begin implementation of a regional tourism marketing plan.
    - Near Term*
      - Individual business websites
      - Regional “portal” website
    - Longer Term*
      - Expanded, improved regional website
      - Regional branding materials (tagline, sub-regional themes, “logo”)
      - Agreements with partners to develop a stronger regional identity – a brand – for the Bristol Bay region
      - Cooperative regional marketing organization with a membership of villages, regional organizations, and businesses
      - Funding for sustainable regional marketing

### **Biggest Challenges**

- Creating a stronger regional identity – a Bristol Bay brand
- Helping people work together; specifically to create more cooperation between:
  - Tourism, commercial fish, arts and crafts
  - Locally owned and non-locally owned tourism businesses
  - Regional organizations (“the BB’s”)
  - Chambers of Commerce in Dillingham, King Salmon/Naknek
  - East and west sides of the Bay
- Helping expand the pool of residents with the skills, knowledge and determination needed to start tourism businesses or work in the tourism industry
- Working with individual communities to encourage the type and level of tourism that meets their particular goals and needs

## STRATEGY I: TARGET MARKETS & ACTIVITIES

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A starting point for any tourism strategy is to identify the most promising markets and types of tourism activities. Understanding who is coming today and who might come in the future allows the region to focus actions on markets that provide the most local benefits, and those that are most likely to continue to visit the area.

Outlined below are suggested target markets. These conclusions are based on a consideration of market interest (including past Agnew::Beck research and the recent McDowell study), regional tourism attractions, and community/resident preferences.

- **Established Markets:** these groups are already visiting the area, and could be persuaded to come in larger numbers and/or urged to spend more time and money in the region:
  - Wildlife viewing – particularly bears, growing interest in walrus
  - Visiting friends and relatives
  - Business travel – this segment of the travel market is very important in Bristol Bay, particularly in the winter
  - Sport fishing/sport hunting – local residents have significant concerns about these activities. In general there is a desire to limit sport hunting; sport fishing is supported if guided.
  
- **Promising Future Markets:**
  - Small package tour groups – cultural and educational
  - Small package tour groups – adventure: kayaking, wildlife viewing, hiking
  - New forms of fishing – locally operated lodges or guided trips; new activities to hold pass-through anglers so they spend more time and money in the region

To hold existing markets and attract new kinds of travelers will require understanding and meeting their specific needs. Ideally an additional modest market study could be done to gain more information on the specific interests of prospective markets. Questions that need to be answered include:

- Expectations regarding length of stay
- Expectations re quality of accommodations and food
- Expectations re costs
- Specific types of activities sought (interest in cultural activities, adventure, etc.)
- Preferences for guided vs. unguided experiences

The chart on the following page gives an additional perspective on trends in nationwide public interest in different types of outdoor recreation and travel activities. This information was derived from the National Survey of Recreation and the Environment (NSRE) [www.srs.fs.fed.us/trends/index.html](http://www.srs.fs.fed.us/trends/index.html) conducted in 1999/2000. As the chart shows, there is substantial and growing interest in many of the activities that Bristol Bay can offer, including wildlife viewing, birdwatching, hiking, camping and backpacking.

Table 2: Nature tourism activities

Outdoor Activity	Number (1994/1995) (000s)	Percent Change (%)
Birdwatching	54.1	155.2
Hiking	47.8	93.5
Backpacking	15.2	72.7
Camping-Primitive Area	28.0	58.2
Outdoor Concert	68.4	54.7
Off-Road Driving	29.9	43.8
Walking	133.7	42.8
Sightseeing	113.4	39.5
Camping-Developed Area	41.5	38.3
Sporting Event	95.2	34.7
Golf	29.7	29.1
Outdoor Team Sports	53.0	25.0
Camping (Overall)	52.8	24.5
Picnicking	98.3	15.9
Running/Jogging	52.5	14.4
Bicycling	57.4	1.6
Horseback Riding	14.3	-10.1
Hunting	18.6	-12.3

1994/1995 National Survey on Recreation and the Environment, USDA Forest Service

## STRATEGY 2: IMPROVE ATTRACTIONS & ACCESS

The Bristol Bay region needs to build on and enhance its strong base of natural and cultural attractions. A particular need is to help current and prospective visitors take advantage of the full package of Bristol Bay regional attractions, including not just fishing and hunting, but bears, walrus, culture, arts and crafts, volcanoes, glaciers, hiking, kayaking, and sightseeing in National Parks and Refuges.

Other than hunting and fishing lodges, Bristol Bay currently has little “infrastructure” to make its attractions accessible for typical Alaskan travelers, such as interpretive centers, trained guides or organized tours. Costs are high to reach Bristol Bay, and travel within the region. As a result, compared to the rest of Alaska, there is relatively limited tourism in Bristol Bay. Western Alaska receives only 5% of all out-of-state visitors to Alaska (SW is Bristol Bay plus Kodiak, the Aleutians, & the Yukon-Kuskokwim Delta). Over the last 15 years, this percentage has declined as a share of all Alaska out-of-state travel. In addition, because few of the area’s hunting and fishing lodges are locally-owned, the tourism does take place generates only modest local economic benefit.

### NEAR TERM ACTIONS

#### A. Provide Travel Itineraries

The cruise ship industry succeeds in part because the cruise lines make travel easy by allowing travelers to have many experiences in a compressed time frame and by taking much

of the uncertainty out of travel. Bristol Bay can provide a measure of these same benefits by preparing a set of itineraries that assemble the best of Bristol Bay into convenient packages. Themes for itineraries that could be developed are listed below. Once these are fleshed out they can be posted on the regional website.

- *Adventure Travel*: emphasizing kayaking in Wood Tikchik, hiking in Togiak area, exploring Valley of 10,000 smokes in Katmai, river rafting in Aniakchak
- *Wildlife Viewing*: King Salmon for Brooks Camp bears, then Dillingham and/or Togiak for walrus viewing, then the Lake Iliamna area for caribou
- *Village and Town Tours*: linking together a series of villages featuring diverse Bristol Bay cultures: Athabaskan, Aluet, Yupik and modern day, including the chance to take a steam, prepare arts and crafts, eat Native foods, experience commercial fishing and meet elders and hear native language
- *Best of Bristol Bay*: bear and walrus viewing, village tours, fishing, flightseeing

These would only be suggested itineraries – a person can not today call up and book any given trip – but these would make it easier for prospective visitors to understand the possibilities, and put together their own experience.

## **B. Better information – on-line virtual tour**

Maps, text and photos can capture the interest of prospective visitors, and make the experience of those who do visit richer and more interesting. The [visitbristolbay.com](http://visitbristolbay.com) website could host this information inexpensively, and allow the information to be readily improved and expanded over time. Topics to cover could include those listed below. The description of attractions in this document is intended to provide a start at preparing this information

- wildlife – locations, characteristics
- commercial fishing – practices, current activities, history
- arts and crafts – photos of examples,
- Native place names
- Maps and photos of natural features (from tuas to volcanoes)

The Nushagak Mulchatna Wood Tikchik Land Trust hosts a website that shows one approach to this goal – an interactive map and photo collection (see website below) [http://www.nmwlandtrust.org/gallery/interactive\\_map.php](http://www.nmwlandtrust.org/gallery/interactive_map.php)

## LONGER TERM ACTIONS

### **C. Better lodging in villages**

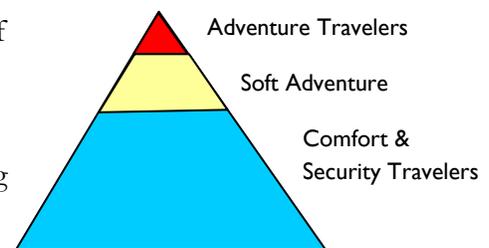
Roughly half the villages in Bristol Bay currently do not have visitor accommodations, or the visitor accommodations they do have would not meet the expectations of many travelers. The lack of high quality accommodations is a weak link that limits potential for expansion of non-consumptive forms of tourism. Improving lodging will help give visitors a better experience, and increase the odds that visitors will spend time and money in Bristol Bay in a

manner that creates local economic benefits. Possible actions to help expand the lodging base are listed below:

- Provide another round of training in starting and running B&B's (as the Bristol Bay Native Association has done in the past)
- Work with villages developing new community facilities to include lodging, with an emphasis on serving business travelers and the flexibility to serve other traveler needs
- Provide a simple, amply illustrated guidebook on lodging styles, pointing out common do's and don'ts for lodging operators, and helping to convey the expectations travelers are likely to have certain quality standards

#### D. Guided Tours

One way to understand the makeup of travelers to Alaska is to think of the pyramid shown at right. The vast majority of Alaska visitors want comfort and predictability. A smaller subset is willing to venture a bit further of the beaten path, and will accept slightly less control and comfort in exchange for greater adventure. Only a very small proportion is willing to take off with minimal guidance, and without the certainty of secure lodging, food and travel arrangements.



In the categories of tourism the Bristol Bay community most wants to encourage – cultural tourism; kayaking, hiking and other forms of adventure travel; wildlife viewing – Bristol Bay currently is only available to the very narrow slice of the market that seeks adventure<sup>3</sup>. Consequently one important strategy for expanding tourism in the area is to encourage development of guided tours, that could offer the chance to enjoy the region's diverse attractions, but with a higher level of comfort and control.

Work has been underway for several years and is continuing, with the goal of determining the prospects for establishing regular, guided commercial tours, built around a combination of local vendors and established tour companies. Several key steps in the process are listed below:

- Summer 2004 product development trip – sponsored by Agnew::Beck and BBVC, took representatives from two established tour guide companies on a 4 day trip through Wood Tikchiks, to several villages along the Nushagak, and then to Togiak.
- August 2006 trip, to be sponsored by the Nature Conservancy and the Nushagak, Mulchatna, Wood Tikchik Land trust. This trip will focus on a float trip down the Koktuli float, with support by Alaska Alpine Adventures, using Luki Akelkok as the local vendor.
- Summer '07 "donor/media" tour

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<sup>3</sup> Brooks Camp bear viewing is one important exception to this statement. This destination can be categorized at the "soft adventure" level. Visiting Brooks Camp is costly, and requires a ride in a small plane (which many people try to avoid), but visitors can stay in a comfortable lodge, eat quality prepared meals, and enjoy the relative sense of security that is created by the presence of many other visitors, as well as Park Service rangers.

Each of these trips is intended to show off the region to potential tour partners, to test the logistics and strengths of alternative itineraries, and help local businesses better prepare themselves to be partners in these kind of trips.

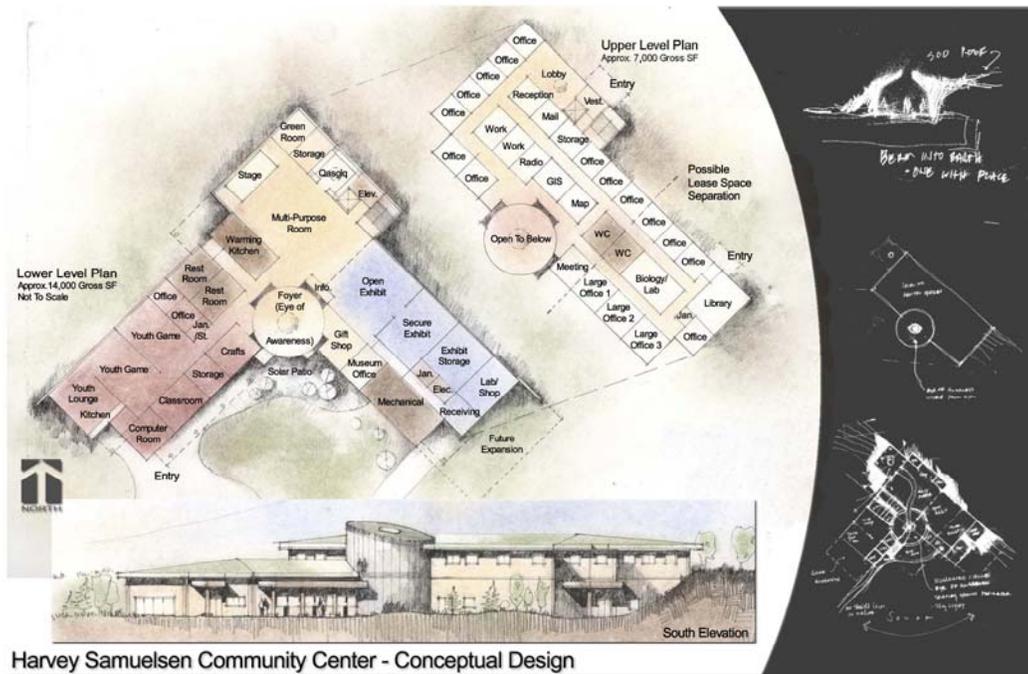
**E. Lower regional transportation costs (e.g. a “eurrail pass” on local planes)**

Travel costs have always been high in Bristol Bay, and have become even higher as energy prices have climbed. Reducing air fare will be challenging, but two options offer promise:

- Book travel for groups of visitors as part of tour packages, and thereby gain a better rate from Alaska Airlines and PenAir
- Work with air charter businesses operating within Bristol Bay to establish the air equivalent of a “eurrail pass” that would allow travelers with more time than money to fly at reduced rates on a space available basis, for a fixed price.

**F. Continue work in progress to develop a cultural center – the Harvey Samuelson Center – in Dillingham**

Work is underway working with the Curyung Tribal Council, the City of Dillingham, Choggiung, Inc. and the USFWS, and with support by Bristol Bay Native Corporation, to develop a multipurpose cultural, visitor and youth center in Dillingham. A conceptual floor plan is presented below. A site has been reserved for the facility, and fund raising is underway to secure funding to build the facility. (Contact Agnew::Beck or the Curyung Tribal Council for more information).



**Harvey Samuelson Community Center - Conceptual Design**  
Dillingham, Alaska

Livingston Stone, Inc.  
March 15, 2005 Page 3

## **STRATEGY 3: SUPPORT TO LOCAL BUSINESS**

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In recent years, as the Bristol Bay commercial fishing industry has continued to decline, more and more residents of the area have expressed interest in tourism, and a number of small tourism businesses have begun. There are approximately 30 existing locally-owned tourism businesses in Bristol Bay communities. The majority of these are small B&B's, mostly concentrated in Dillingham; there are also several charter air services, guide services, and arts and crafts stores. In addition, a number of Bristol Bay Village Corporations and tribal organizations lease land for tourism uses, such as fishing camps and lodges. This includes the 4 Nushagak River communities that collectively support the river patrol program described above, and the villages of Igiugig and Pedro Bay. Finally, a number of businesses not directly involved in tourism benefit from tourism spending, including restaurants, air taxis, grocery stores and fuel suppliers. As stated above, the large majority of the tourism businesses in the region and the vast majority of the profits and jobs related to tourism continue to be in the hands of parties from outside the region.

This strategy focuses on actions to assist small existing or planned businesses. This strategy can help individual entrepreneurs, and equally important, it can create visible local successes to help encourage the next generation of job seekers and business start-ups. This strategy is proposed as an alternative to the more traditional approach for encouraging tourism development in rural Alaska, that is, to emphasize conferences and workshops. While not without value, given limited resources, the strategy of targeted support to individuals appears to be more likely to bear fruit.

### NEAR TERM ACTIONS

#### **A. Pilot Project Web Sites**

Help businesses develop their own simple, individual websites. As part of this project, “pilot project” websites are being developed for five existing Bristol Bay tourism businesses (see following marketing section of this report for details).

### LONGER TERM ACTIONS

#### **B. Improved Regional Marketing (see below)**

#### **C. Micro-Lending Program**

Experience around the country and world shows that businesses can benefit from even very small loans, to cover start-up costs and ongoing expansion and improvements. The Lake and Peninsula Borough is starting just such a program. This should be supported by regional partners, to spread the word, provide funds and help small-business owners qualify.

#### **D. Training and Mentoring Programs**

Many individuals in Bristol Bay are interested in starting a tourism-related business, but don't have the necessary skills. More work is needed to help meet this demand, including establishing training programs providing direct technical assistance to businesses, working in

partnership with local organizations including the King Salmon Business Development Center, and the University of Alaska Bristol Bay campus in Dillingham.

### **E. Business Partnerships**

Encourage partnerships between small village businesses and the larger, more established tourism businesses based in regional hub communities such as Dillingham (e.g. air charter services) and also with the larger established lodges in the area.

### **F. Support for Arts and Crafts**

Production and sales of arts and crafts offers one of the best ways to mesh the potential of tourism with the interests and lifestyles of Bristol Bay residents. Arts and crafts as an economic development activity offers a number of positives: crafts can be produced year round and producing crafts provides an excellent way to sustain cultural traditions. What is clear is that there are many skilled artisans in Bristol Bay, and a huge global demand for arts and crafts; what is more challenging is finding ways to connect these suppliers with this demand.

One promising step now in progress is development of an arts and crafts coop, based in the King Salmon area. This may help Bristol Bay artists develop and market their crafts. Several general principles for creating successful arts and crafts ventures are listed below:

- Take advantage of the internet, at minimum to display wares, and possibly to sell products
- Present arts and crafts in the context of travel experiences to create a greater urge by travelers to spend (e.g., offer grass baskets for sale after a hike that shows travelers where and how grass is harvested)
- Add value by including stories and pictures about the artisans, the significance of the item being sold, and the history of the area. Including this type of information can increase sales prices by 50-100%
- Make it easy for artisans to add information, as is suggested above, but providing standardized templates, cameras, etc.

## STRATEGY 4: COOPERATIVE MARKETING

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The previous sections focused on actions to improve attractions and help individual businesses. This section looks at steps to develop a stronger market image for the region and strategies to convey this message.

Three major themes drive this section:

1. Need to create a regional “brand” – to define a distinctive, memorable identity for Bristol Bay as a whole and its several distinctive sub-regions. Appendix C outlines general principles and gives examples of successful branding efforts.
2. Need for partnerships – between local businesses, land management agencies, local communities and villages, the “BB’s” – Bristol Bay regional organizations, out-of-region tourism businesses, and out of region tourism organizations such as ATIA (the Alaska Travel Industry Association).
3. Need for cooperative marketing. The case for cooperative marketing is compelling:
  - *More bang for the buck* – businesses and communities that work together can stretch their marketing dollars. For example, the Dillingham and King Salmon/Naknek Chambers of Commerce could pool resources and send a single representative to a lower 48 trade show. The same logic applies in developing high quality websites, brochures and other marketing materials.
  - *Louder voice* – few tourism businesses can afford advertising at a scale that gets their product in front of a wide audience. As a result, to be successful, competing tourism businesses routinely pool resources to get out a message they can’t afford to convey on their own. For example, a group of businesses or communities could share the cost of placing a good sized advertisement in the Alaska Airlines magazine, which none of them could afford individually.
  - *Selling a package of attractions* – in the intensively competitive tourism marketplace, no single central Bristol Bay tourism attraction is likely to have the magnetism needed to draw visitors. In contrast, the package of regional attractions – walrus, bears, fishing, culture and history, wilderness, volcanoes, National Parks, etc. - is strong and appealing. A cooperative marketing approach is the best way to tell this story.
  - *Empirical evidence* – Bristol Bay is competing against bigger, better organized and better funded businesses and destinations. The most successful destinations – around Alaska and around the world – have found ways to pool their resources to increase their marketing clout. Western Alaska is currently losing market share to these other, better organized destinations.

## NEAR TERM ACTIONS

### **A. Pilot Project Web Sites;**

### **B. Regional “Portal” Web Site**

As part of this project, a set of pilot project websites have been developed for five Bristol Bay tourism businesses. In addition, a portal site was developed to provide a start for what it is hoped will become a full regional website. The sites can be viewed at <http://www.visitbristolbay.org>

The websites for individual businesses are labeled pilot projects because the sites are intended to demonstrate, rather than merely describe, the benefits of even very simple web-based marketing. The businesses selected for websites include a mix of different kind of businesses, in different parts of Bristol Bay.

### **C. Fall 2006 Regional Tourism – Refine and Approve Regional Marketing Plan**

This plan presents a good start at a regional marketing strategy. More work is now needed to revise and refine this plan, working with all the partners discussed below. The specific proposal to achieve this goal is listed below:

- Circulate the document to individuals with long experience in tourism in Bristol Bay and get their feedback (many of these people were consulted in the development of this document; this next step provides a chance to review the full plan)
- Refine the plan based on this initial review
- Circulate the revised plan to a wide range of parties with an interest in tourism, as an invitation to participate in a fall Tourism Work Session
- Host a Bristol Bay Visitors Council Tourism Work Session in Fall 2006 (in King Salmon) to bring together a wider group of partners to further refine the plan, and to reach firm conclusions on responsibilities for carrying out plan recommendations.

## LONGER TERM ACTIONS – DRAFT REGIONAL MARKETING PLAN

As described previously, currently there is only a partial effort to market Bristol Bay as a whole. The area would clearly benefit from a coordinated regional, sub-regional & local tourism marketing effort. The challenge is finding a way to organize and fund such an effort, in a vast area that is politically fragmented, and whose primary existing tourism segment (fishing lodges) generally doesn't support cooperative marketing.

The material below outlines a modest, and it is hoped achievable marketing strategy, based on a series of small steps, and building partnerships. The goal of this effort is to help increase access to information by potential visitors, to convince existing visitors to spend more time and money in the region, and to attract new kinds of visitors to the area, with a focus on wildlife viewing, river floating, cultural activities and other non-consumptive traveler activities.

This list was developed through a combination of the recent BBNA Economic Action Summit and a synthesis of past work in the region by Agnew::Beck. Additional thoughts are welcomed and encouraged.

1. **Individual Websites** – Help a handful of individual local businesses develop basic websites (done as part of this project). The goal of this effort is to help the individual businesses, and at the same time, provide a model that other local businesses can work to match. Information on the following pages presents more information on work completed to date.
2. **Regional Website** – Develop and host a new website – VisitBristolBay.com – as a “portal site” and link to the individual business sites.

Phase 1 – create a basic site with links to the individual business sites, and links to as many partner sites as possible (done as part of this project). Include basic information on Bristol Bay travel opportunities.

Phase 2 – continue to expand the list of businesses linked to the VisitBristolBay.com site. To the degree funding permits, help other locally-owned businesses develop their own websites. Expand the information included on the main portal site, to include the topics listed below. Starting in Fall 2007, charge a modest fee to member businesses for hosting their sites.

- Tourism itineraries
- Links to arts and crafts
- Links to commercial fishing information
- Maps
- More links to other sites
- More complete regional inventory of attractions (much of this research and work is already done, as part of previous efforts by the Bristol Bay Visitors Council, and work by Terry Johnson)

Phase 3 – set up a system to sell advertising, and interactive information that would allow site visitors to gain a wide array of information about travel opportunities, regional cultural and natural history, and perhaps to book trips.

3. **Branding Package, First Draft** – Develop basic/preliminary branding materials, including concepts for a tagline, sub-regional themes, and a regional “logo”. This information will be used to help explain (and sell) the concept of regional branding as part of the following step.
4. **Branding Package/Branding Program** – Work with partners to develop more complete and finalized regional branding materials that reflect Bristol Bay’s assets: fish, wildlife, culture and wilderness. Present proposals, through villages, to promising Bristol Bay partners. Through this process, work out a strategy that will allow differentiation between the three main Bristol Bay regions<sup>4</sup>, even as they

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<sup>4</sup> Bristol Bay is big enough that in addition to selling the area as a whole it is important to feature the distinctive attractions of individual regions. While the case might be made for 4 or 5 such sub-regions, in the interest of

cooperate in marketing the attractions of the region as a whole. Seek commitment of modest funding and/or other resources to support regional marketing efforts.

Prospective partners include:

- BBNC (already supporting regional tourism planning efforts)
- BBNA
- Lake and Peninsula Borough
- Caretakers of Our Land (get right name, Nushagak group)
- The Nature Conservancy

The overall goal of this marketing initiative is to link four themes:

- Marketing Bristol Bay commercial fish
- Marketing arts & crafts
- Marketing tourism
- Promote stewardship

Specific marketing products of this expanded regional effort would include the following:

- Refined logo & tagline
- Refined, improved website
- Regional brochure
- Regional promotional DVD, in partnership with Lake and Peninsula Borough
- Revitalized BBVC, with executive committee made up of partners, to guide marketing process

5. **Market Research** – at any point in this process it would be very valuable to have more precise knowledge about prospective visitors. One promising way to do this is with focused, web-based research, conducting a targeted survey of prospective visitors, travel agents and tour guides, to gain information to help businesses be better prepared to attract and satisfy new clients. Information that could be collected includes: current knowledge the Bristol Bay region, types of activities sought, likely length of stay, expected level of comfort, preferred structure of trip (independent vs. guided), level of adventure sought, expectations regarding price.
6. **Regional Marketing Organization** Set up cooperative regional marketing organization with a membership of villages, regional organizations, and businesses (both locally owned, and those owned by people from outside the region). For example, find an approach for partnering with BBEDC e.g., partner with BBEDC to market the unique natural environment that is home to 50,000,000 salmon, rich cultural traditions, and that also offers great travel opportunities

Phase 1 – (current status) rely on the BBVC, as staffed by Agnew::Beck (and supported by BBNC) to coordinate marketing efforts among different tourism interests.

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simplicity, we argue that the area has three main sub-regions: Nushagak/Togiak (Dillingham access); Peninsula (King Salmon access), and Lakes (Lake Clark, Lake Iliamna – Iliamna Airport access).

Phase 2 – establish or designate a regional entity as a non profit marketing organization, with the capability of generating and spending marketing funds. One option is to formalize BBVC as a non profit organization; another is to establish an arm of one the existing regional BB organizations, responsible for this task. Annual marketing efforts of such an organization include

- Ongoing improvements to the website
- Marketing the website
- Production and distribution of marketing materials
- Responding to visitor inquiries
- Direct services to marketing partners and businesses
- Arranging for and hosting familiarization trips
- Establishing an annual marketing/membership fee, that provides marketing benefits in exchange for funding source and visitor booking system.

7. **Partner for Arts and Crafts Sales** – Work to develop a method to cooperatively market local art and crafts; partner with crafts cooperative now being developed
8. **Booking Service** – Set up cooperative regional marketing and visitor booking system – including options for online booking and 800-number service, in partnership with Chambers of Commerce.

## APPENDICIES