

## **APPENDIX A**

### **Market Analysis**

## EVALUATION OF DEMAND FOR USE OF THE PLANNED FACILITY

**TABLE 1: SUMMARY OF CONCLUSIONS - HOW MUCH & WHAT TYPE OF USE? HOW MUCH REVENUE?**

	Market Size – Today & 1 <sup>st</sup> 5 years				Market Size – in 5-10 years			
	Low Scenario		Moderate Scenario		Low Scenario		Moderate Scenario	
<b>Community &amp; Regional Users</b>	<b>#/ year</b>	<b>Revenue</b>	<b>#/ year</b>	<b>Revenue</b>	<b>#/ year</b>	<b>Revenue</b>	<b>#/ year</b>	<b>Revenue</b>
Larger meetings/events (>75 people)	50 mtngs	\$7,500	50 mtngs	\$10,000	50 mtngs	\$7,500	70 mtngs	\$14,000
Smaller meetings/events (<75 p)	50 mtngs	\$1,250	50 mtngs	\$2,500	50 mtngs	\$1,250	70 mtngs	\$3,500
Visits other than for Meetings/Events	5000 people	\$1,000	10,000 people	\$2000	10,000 people	\$2,000	12,000 people	\$2,400
<b>Subtotal Estimated Revenue</b>		<b>\$9,750</b>		<b>\$14,500</b>		<b>\$10,750</b>		<b>\$19,900</b>
<b>Out of Region Users/Tourists</b>	<b>#/ year</b>	<b>Revenue</b>	<b>#/ year</b>	<b>Revenue</b>	<b>#/ year</b>	<b>Revenue*</b>	<b>#/ year</b>	<b>Revenue*</b>
Hunting/Fishing Visitors	560 people	\$1,120	700 people	\$2,100	1125 people	(see total)	1500 people	(see total)
Business Visitors	115	\$230	140	\$420	225		300	
Visiting Friends and Relatives	95	\$190	120	\$360	200		270	
Nature/Culture/Adventure (total)	260	\$620	325	\$975	2700		3650	
Package groups					2250		3050	
Independent					450		600	
<b>Subtotal (visitors, revenue)</b>	<b>1,032</b>	<b>\$2,160</b>	<b>1,285</b>	<b>\$3,855</b>	<b>4,250</b>	<b>\$8,500</b>	<b>5,720</b>	<b>\$17,160</b>
<b>TOTAL</b>		<b>\$11,910</b>		<b>\$18,355</b>		<b>\$19,250</b>		<b>\$37,060</b>

*The table above presents an overview of the projected demand and revenue for the planned facility. Background to this information is presented in Section 3 of the report, plus Appendix Tables 3 through 9. \*Note: Revenue estimates for tourist visits 5-10 years into the future is done in aggregate, without doing estimates for each separate category of visitor.*

## DEMAND PART 1 - A LOOK AT USE LEVELS IN COMPARABLE FACILITIES

The table below summarizes the experiences of facilities that share at least some of the characteristics of the one planned in Dillingham, and provides a context for considering the type of demand, and level of use.

- The magnitude of local use varies greatly, due to variations in population size, programs offered and the price of admission. Most use at the Bethel Museum, for example, is from local residents. Use in Kodiak is balanced between locals and visitors.
- The magnitude of out of town visitor use likewise varies greatly. Package tours are key to facilities with large numbers of out of town visitors, as occurs at the Alaska Native Heritage Center and the Inupiaq museum in Barrow.
- Location & accessibility is a major factor in the high numbers of users at the King Salmon Visitors Center. A majority of all visitors to the King Salmon area stop by the Visitor Center, due to its location immediately adjoining the Alaska Air/Pen Air terminal.

**TABLE 2: TYPES OF USERS AT COMPARABLE FACILITIES**

Facility	Population (1999)	Estimated # of Visits To Facility	Out-of-State Tourists to Area*	Entry Fee (adult)	Notes
<b>Alutiiq Museum, Kodiak</b>	6,859	10,000	10,700	\$2.00	1500 school kids
<b>Bethel Museum</b>	5,463	20,000	1,400	\$1.00 avg	2000 tourists
<b>Inupiaq Heritage Center (Barrow)</b>	4,397	20,000	3,500	\$5.00	8000 tourists
<b>King Salmon Visitors Center</b>	1,297 (boro)	15,000	10,300	Free	Airport location key
<b>Museum of the Aleutians</b>	4,285	3-4000?	1000	\$2.00	
<b>Dillingham</b>	2,300	NA	3,200	NA	
<b>AK Native Heritage Center</b>	260,000	100,000	540,000	+/- \$25	75% package; 25% VFR, resid., indep.
<b>Pratt Museum Homer</b>	4,155		134,600		
<b>Seward Sealife Center</b>	3,040		248,100	\$12	

\*1993 AVSP Summer Out-of-State Visitors (most recent actual survey of numbers of tourists; out of date, but still gives sense of relative magnitudes.) "VFR" is visiting friends and relatives.

## DEMAND PART 2 – DEMAND FOR DILLINGHAM MEETINGS, CONFERENCES, EVENTS

### Overview of Trends in Supply and Demand for Meeting Facilities

- Dillingham has many small-moderate sized meeting facilities, but no dedicated meeting space for groups of more than about 75 (see Table 4). School multi-purpose gym space is currently used for larger events (Middle School - 250 people, Elem. School 400).
- Existing meeting places have limited support equipment and services (limited internet access, photocopying, phone banks, etc.)
- Costs to rent space range from no charge to about \$100 for a small meeting, up to \$2-400 for a big event in a gym)
- People interviewed all would like access to bigger, higher quality space. At the same time, all indicated they are quite price sensitive, and would hesitate to pay more than they currently spend for meeting space.
- Capacity for larger meetings is currently constrained by lodging capacity (community currently has beds for about 200 out of town visitors). To some degree, increasing meeting capacity will create incentives to increase lodging capacity.

### Existing and Projected Demand for Meeting Facilities

**TABLE 3: CURRENT DEMAND, PROJECTED USE AT THE PLANNED FACILITY (LOW SCENARIO, TODAY)**

Type of Meeting Event	Current Annual Use in “event/meeting days” (see Table 5 for details)	% Likely to Pay to Use Planned Facility	Projected Total “event rental days”	Average Fee	Total
<b>Larger - 75-200 people</b>	Appx. 60	85%	50	\$150	\$7,500
• <b>Smaller: &lt; 75 people</b>	Appx. 250	20%	50	\$25	\$1,250

- The magnitude of meeting space rentals in the planned facility will depend on the factors and assumptions listed below:
  - *quality/location of facility*: modern, clean, good parking, accessible location, good acoustics, comfort (including comfortable chairs), beverage service, access to food service
  - *equipment*: teleconference, PA/sound system, recording, audio visual, high speed internet connections, stage, stage lighting
  - *flexibility of space*: ability to support small groups (10-75) and large groups (>75) in a single facility
  - *planning*: coordination among meeting planners within the community
  - *marketing*: the community should develop capacity to actively solicit business meetings and conferences (as, for example, is done in all of Alaska’s larger towns, and increasingly in smaller communities including Valdez, Kodiak, & Wrangell)
- For the project to succeed, community organizations, businesses, residents, will need to regularly rent meeting space at the facility.

**Growth in Future Demand:** Over time, active cooperative marketing, growth in lodging, improvements in town attractions, etc. can be expected to lead to a 2-4% annual increase in meeting use. Two key elements of this expansion will be: a) local commitment to holding and paying for meeting space (including some regional meetings currently taking place in Anchorage, b) attracting small statewide meetings and conferences (e.g. agencies, professional groups) that select meeting sites from communities around the state.

**TABLE 4: EXISTING FACILITIES IN DILLINGHAM**

Facility	Capacity/Size	Equipment	Records of Use	Charge to Use	Notes
<b>ELEMENTARY SCHOOL GYM</b>	300-500	Access to overhead projector, phone down the hall. Approved Commercial Kitchen	No formal records. seldom allow use on school days	\$20/hour \$100 max plus fees for kitchen workers, some equipment	Multi-purpose setting, carpeted floor, acoustics mediocre - requires sound system, "smells like socks of 1600 school kids"
<b>MIDDLE SC. GYM,</b>	200-250	Access to overhead projector, portable PA., phone down the hall	No formal records. (example of user: Fish Board meeting)	\$20 / hour \$100 max	Gym setting, acoustics mediocre - requires sound system, limited stage lighting. Portable stage & curtain divides room
<b>HIGH SCHL. GYM</b>	Up to 1000	Access to overhead projector, portable PA, phone down the hall	No formal records. (example of user: Beaver Round-up)	\$30 / hour \$200 max	Big gymnasium, wood floor, bleachers, portable stage, floor coverings available
<b>CURYUNG TRIBE MULTI-PURPOSE ROOM</b>	50-60	Access to standard equipment (overhead, teleconferencing)	50-60 small group meetings per year	\$100 a day + \$50 cleaning fee if not left clean - No charge for tribe related business	older facility, has flexible folding tables and chairs; small kitchen
<b>BRISTOL INN/ CHOCCIUNG</b>	Big room: 40-60 (80 fire marshal capacity) Small room: 20	Available in room (overhead, slide projector, TV/VCR, teleconferencing)	Between Oct-May 01 – big conference room used on 99 days	\$90 for meetings, fee waived if linked to use of 10-20	Most modern, comfortable of smaller city spaces. Advantage is link to hotel
<b>CITY COUNCIL CHAMBERS</b>	41 people, 616 SF main space; raised area for council & staff, side room for add'l 12-15 people	Good PA system, recording system, no kitchen. Access to overhead projector, teleconferencing	"over a typical month, reserved for use on at least ¾'s of the days" most use is evenings boards, commissions	No charge (which is big part of reason for demand)	Older facility, stuffy with larger groups, city staff pays janitorial costs
<b>SENIOR CITIZENS CENTER</b>	50 people max	Approved Commercial Kitchen.	no formal records. used for family gatherings, potlucks, 2-3 meetings per month, some months 6-7, some none.	\$150 for dining room \$100 for commons \$75 for kitchen	Uses dining area, had dividers, so can be divided into two facilities, newer facility (80's)
<b>FIRE HALL/BINGO</b>	135	Approved Commercial Kitchen. Lots of tables & chairs. Bingo equip.	Bingo every Tuesday.	\$75, plus \$50 for kitchen. Gaming events charged \$200	Older facility. Operated by Senior center. 2 <sup>nd</sup> floor no handicapped access
<b>BBNA</b>	998 SF board room, capacity of 67 people	Large conference table, access to standard equipment (overhead, teleconferencing)		Allow use, no charge, when not used by BBNA	Outside of main downtown area

a 2 day mtng = 2 "event days"

**TABLE 5: SUMMARY OF CURRENT MEETINGS IN DILLINGHAM, ESTIMATED REVENUE**

**A. Larger Meetings (75 or more) – Occurring Regularly on an Annual or More Frequent Basis**

	People	Frequency	No of Days	“Event days”	Possible Fee	Total
<b>BBEDC – Annual Meeting</b>	100	1/year	1-2 days	2	\$150/day	300
<b>BBNA Village Tribal Conference</b>	100	1/year	1-2 days	2	\$150/day	300
<b>BB Health Annual Meeting</b>	100	1/year	1-2 days	2	\$150/day	300
<b>BB Health seasonal parties</b>	100-150	1/year	1 evening, (2x)	2	\$150/day	300
<b>BB Health Village Health Aids</b>	100	1/year	1-2 days	2	\$150/day	300
<b>Choggiung Shareholders?</b>	100	1/year	1-2 days	2	\$150/day	300
<b>Fish &amp; Game Advisory Meetings</b>	50-60	4-6 times/yr;	1 day	5	\$150/day	750
<b>University Graduation</b>	75?	1/year	2 days	2	\$150/day	300
<b>Beaver Round-Up (e.g. crafts fair)</b>	150	1/year	2-3 days?	3	\$150/day	450
<b>Other/Miscellaneous</b>	100+	10 per year	1 day	10	\$150/day	1500
<b>Estimated Total</b>				<b>32</b>		

**B. Larger Meetings – Occurring on an Irregular Basis**

	People	Frequency	No of Days	“Event days”	Possible Fee	Total
<b>SWAMC Spring, Fall Conference</b>	100?	1 in 3 yrs	3	1	\$200/day	
<b>Board of Fish, Board of Game</b>	100?	1 in 3 yrs	3	1	\$200/day	
<b>North Pacific Mgt. Council</b>	100?	1 in 4 years	2	.5	\$200/day	
<b>Special Econ. Develop. meetings (e.g. EDA, Denali Comm.)</b>	100-150	1 of 2 years	2	1	\$200/day	
<b>BBNC Meetings</b>	100+	1 of 2 years	1	.5	\$200/day	
<b>Community Events (weddings, potluck dinners)</b>	100+	8/year	8	8	\$50/day	
<b>Community Events – performing arts (local performers)</b>	50-80	8/year	1	8	\$200/day	
<b>Community Events – performing arts (outside performers)</b>	150-200	4/year	1	4	\$200/day	
<b>Other meetings</b>		5/year		5	\$200/day	
<b>Total</b>				<b>29</b>		

(Table 5 Continued)

**C. Smaller Meetings (under 75 people)**

	People	Frequency	No of Days	“Event days”	Average Fee	Total
<b>City, Agency, Non-Profit Meetings</b> e.g. City Council, USFWS, ADF&G, Bristol Bay regional organizations, Nushagak land trust	10-40	15/month	1	15/month	\$50	
<b>Community Organization Meetings</b> e.g. Arts Council, Snow machine organization, Dog mushing org.	5-15	10/month	1	10/month	\$35	
<b>Training and Education Meetings</b> e.g. Health Corporation, BBNA VSOPs, training, sobriety...	12-25	4/month	3	12/month	\$100	
				37		

To achieve fee levels shown in Table 5 will require creative marketing, persuasion, and special services. For example, small groups might accept a \$35 fee if it included “free” coffee and food service; other groups might be willing to pay for food and beverage service in exchange for the “free” use of a meeting room.

### DEMAND PART 3 – OTHER LOCAL USE (Youth Programs, Classes, etc.)

- This category refers to local and in-region use, for purposes other than meetings. Examples include simple visits to the facility and structured events, such as culture related classes (mask carving), cultural events (dance, story-telling), programs for school children.
- In other communities (e.g. Kodiak) this category of use constitutes a large percentage of total visitors. For example in Kodiak over half of total visitors to the facility are locals participating in various cultural programs.
- Current activities in these categories in Dillingham include occasional specific events or programs sponsored, for example, by the tribe, BBNA, the University and the school. The planned cultural facility would significantly expand these types of programs.
- This type of use is likely to generate minimal admission fees from participants. Figures below assume that the facility has a donation box, with 1 in 5 locals dropping in a dollar, generating an average of \$.20/visit. Local use, however, will be critical to generate a base of local paid memberships in a cultural center association, which will help cover ongoing operating costs for the facility.

**TABLE 6 - ESTIMATED ANNUAL VISITS FROM LOCAL RESIDENTS**

Population	Low Scenario:			Moderate Scenario:		
	Total Visits		Revenue	Total Visits		Revenue
<b>Today: 2500</b>	2 visits/year	5,000	\$1000	4 visits/year	10,000	\$2000
<b>5-10 years into future: 3000</b>	2 visits /year	6,000	\$1200	4 visits/year	12,000	\$2400

### DEMAND PART 4 – OUT-OF-REGION USERS (Tourists from Alaska & Beyond)

#### Overview of Trends in Supply and Demand for Visits from Outside the Bristol Bay Region

- In 2000, Alaska was visited by approximately 1.5 million tourists. During the mid 90’s out-of-state visitation grew at between 5-10% annually. More recently, growth rates have slowed to less than 3% a year.
- Only a small percentage of all out-of-state Alaska visitors venture off the main tourist routes of Southeast and Southcentral. Total out-of-state visitors to rural locations like Bristol Bay, or communities like Dillingham, total only about 50,000 visitors a year.
- Dillingham receives an estimated 5,000 and 10,000 out-of-region visitors each year, including out-of-state visitors and Alaskans from outside Bristol Bay. Fishing and hunting is the main attraction. Many of these visitors pass quickly through Dillingham’s airport, spending little or no time in the community.
- Dillingham has strong intrinsic potential for nature, culture or adventure-tourism – the activities that are the main reasons visitors currently visit the rest of Alaska. Currently, however there are few organized tours, facilities or other “infrastructure” for these type of activities in the Dillingham area.

**Existing and Projected Demand by Out-of-Region Visitors**

**TABLE 7: CURRENT & FUTURE VISITATION TO DILLINGHAM, PROJECTED FACILITY USE (LOW SCENARIO)**

Type of Visitors	Out of Region Visitors Today		Facility Visits: Near Term		Out of Region Visits: Future		Facility Visits: Future	
	Est. split of Visitor types	Total Dillingham	% visiting	#	Est. split of Visitor types	Total Dillingham	% visiting	#
Hunting/Fishing	75%	5,625	10%	563	50%	7,500	15%	1125
Business Visitors	10%	750	15%	113	10%	1,500	15%	225
Visiting Friends and Relatives	5%	375	25%	94	5%	750	25%	188
Culture /Eco/Adventure Travel	10%	750	35%	262	35%	5,250		0
Package groups					20%	3,000	75%	2250
Independent					10%	1,500	30%	450
<b>TOTALS</b>		<b>7,500</b>		<b>1032</b>		<b>15,000</b>		<b>4238</b>

**Success Today/Growth in the Future - What will make it Happen?**

- Continuation of healthy tourism market in Alaska as a whole.
- Making cultural/community center the lively center of town life, with programs, exhibits, activities of interest to visitors.
- Growing new visitor businesses, opening new ways for travelers based in Dillingham to experience local attractions.
- Increasing package tour travel to Dillingham, with the cultural center as one component of a nature and cultural tour.
- Sustained, creative cooperative marketing of Dillingham, Bristol Bay in general.

## BACKGROUND: TOURISM TRENDS IN THE WORLD AND ALASKA

### 1. Global Trends

- Shorter Trips – Nation-wide and in Alaska, travelers are tending towards more frequent, shorter trips, closer to home.
- Changing Visitor Demographics/Changing Visitor Interests – The preferences and size of the baby boom are increasingly impacting the character of tourism, around the world. Baby boomers are replacing their parents as the most common Alaska visitors. *Two examples:*
  - Ecotourism: Packaged Adventure/Culture Tours The recent, global development of adventure travel package tours is one example of the influence of baby boomers. These trips cater to travelers who can pay \$200-400 per day for a vacation that is low on hassles, can be scheduled into a busy life, provides adventure, but typically also a fair degree of comfort (a clean, warm bed and good meal at the end of the day).
  - “Lifelong Learners” The single most distinguishing characteristic of “ecotourism travelers” is their high level of education and interest in learning while traveling. 82% of North American eco-tourist market are college graduates vs. 25% of all Alaska vacation pleasure visitors (Pam Wight, 1995).

### 2. Alaska Trends

- Surveys show that the number one and two Alaskan draws are scenery and wildlife. In Alaska, 9 of 10 visitors from outside the state come for reasons other than hunting, fishing.
- Culture/history attractions are important secondary attractions for most visitors, but rarely a reason on their own for a trip to an outlying location. Cultural tourism destinations located along major travel corridors (e.g. Ketchikan Totems, Skagway Historic District, Anchorage Museum) are among the top ten most visited specific destinations in Alaska.
- Growth in Cruise Ship Tourism - In contrast to independent travel, which has been flat or declining in recent years, cruising continues to grow steadily. In 1997, cruise passengers leaving Vancouver BC for Alaska increased 17% over the previous year. Between 1990 and 1997 Alaska cruise boat capacity grew from 16,222 to 31,202 berths. Cruise travel continued to grow steadily between 1997 and 2000, although at a slowing rate. Increases are driven by and reduced prices, growing interest by the aging baby boom in affordable, easy vacations; and increasing investment in capacity by large cruise companies. Cruise Worldwide, the cruise industry is investing \$15 to 20 billion dollars in new cruise ships.

### Implications for Dillingham

*Increases the challenges of attracting new Bristol Bay visitors*

*See below:*

*Potential market for Bristol Bay - requires sophisticated marketing; excellent guides; sustained, high quality*

*Potential market for Dillingham cultural center. Options range from Elderhostel, to programs like Crow Canyon Center in NM*

*The cultural/visitor center, by itself, is not likely to draw more independent travelers. The center, could however, be a component of new package tours.*

*The biggest, fastest growing segment of the Alaska travel market place is currently not coming to Dillingham (but does visit Katmai). Opportunities exist to develop package trips connecting KS and Dillingham.*

- Established Destinations Reaching Capacity – Many of Alaska’s more established destinations are showing problems related to capacity. This includes places like Juneau and Skagway, where upwards of 650,000 annual cruise ship travelers strain capacity of roadways, trails, and resident patience. Other locations, such as Denali and Glacier Bay, are reaching capacity as defined by the public land managers responsible for maintaining quality of the natural environment and quality of the experience for visitors. As a result, tourism operators hoping to grow are looking to take visitors to new, off-the-beaten path locations. Destinations that can readily be added to established travel patterns can benefit from this trend<sup>1</sup>.
- Growth of New Travel Modes – Tour companies are developing a variety of new, quasi-independent, land-based travel options, such as rentals of campers or cars, tied to reservations at hotels, but where the traveler sets their own daily schedule.
- Declines in State Marketing Budget – Alaska has dropped from a rank in the top 5 of state marketing budgets to a position in the lower 20. A restructured state tourism organization – the Alaska Tourism Industry Association - hopes to reverse this trend.

*See note above.*

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<sup>1</sup> Charlie Ball, vice president of Alaska tour marketing and sales of Holland America Westours, was quoted in a recent article in *Travel Weekly* (11/8/99) talking about the need to direct future growth to smaller communities and outlying wilderness destinations: “These are not mass market destinations,” he said, “but, if we develop enough of them, even slowly and in low numbers, we can continue to grow. ”That’s how we have to go from here. We have to ‘finger out’ itineraries from the traditional routings and get cruise-tour passengers to stay an extra day or two.” “More soft-adventure tours, more car rental-based tours, the Wrangell/St. Elias wilderness, the Kachemak Bay community of Homer, the Kenai Peninsula, the south Denali region... these are the other likely tourism growth areas in the first decade of the new century,” according to the Westours executive.

## TRENDS, RESOURCES IN SOUTHWEST ALASKA, BRISTOL BAY AND DILLINGHAM



Remarkable Natural Resources - The Bristol Bay region is blessed with spectacular natural terrain - volcanoes, glaciers, rocky peaks. The landscape supports a remarkably healthy, productive ecosystem. Over 50 million salmon run up Bristol Bay waterways in a normal year, in turn supporting 10,000 brown bear and numerous other species. Fourteen of Alaska's 25 largest lakes are found here, including Lake Iliamna, the State's largest lake. Fourteen million acres, about half of the region, are designated as parks and refuges. This includes Wood-Tikchik State Park, Walrus Island State Refuge, Katmai and Lake Clark National Parks; and Togiak, Becharof, & Alaska Peninsula Wildlife Refuges.

Remarkable Cultural Resources - Bristol Bay is unique in that four of Alaska's major Native ethnic groups reside here. To the northwest, Yup'ik Eskimos live in the Togiak and Nushagak River areas. To the northeast, Athabascan communities surround the Lake Iliamna area. To the south, Alutiiqs and Aleuts live in the Naknek River drainage and the Alaska Peninsula. Like much of Alaska, the traditions developed over 10,000 years of Native history are being rapidly transformed. Building on the base of Native cultures is a complex blend of European, Asian and other influences, creating a unique, at times bewildering mix of traditional and modern cultures.

**TABLE 8 - TOURISM IN BRISTOL BAY** Out of State travel to SW Alaska, including Bristol Bay, is declining as a percentage of Alaska tourism: Southwest Alaska (which includes Bristol Bay, Kodiak, the Peninsula and the Yukon-Kuskokwim Delta) was visited by only 6% of all out-of-state travelers to Alaska in summer '93. Recently, this has likely dropped further, to about 4.5%.



Region	Summer 1985	Summer 1989	Summer 1993	Summer 1999*
Southcentral	282,900 (66%)	356,400 (69%)	569,300 (68%)	816,000 (68%)
Southeast	258,500 (60%)	307,700 (60%)	502,800 (60%)	720,000 (60%)
Inter./North	189,000 (44%)	180,500 (35%)	295,100 (35%)	420,000 (35%)
Denali	144,200 (33%)	175,200 (34%)	301,200 (36%)	432,200 (36%)
Southwest	29,200 (7%)	42,200 (8%)	47,100 (6%)	54,000 (4.5%)
Alaska Total	431,200	521,100	836,900	1,200,000

1985, 89, 93 - 1Summer Visitors; Source: 1993 Alaska Visitor Statistics Program Data

\*1999 The full AVSP survey process, which is the basis to estimated visitation by region, was not conducted between 1993 and 2000. However, annual estimates of total statewide summer visitation were prepared. Consequently regional breakdowns shown for 1999 are based on an extrapolation of the 1993 percentages. The SW percent of statewide visitation is adjusted to 4.5%, to reflect the fact that the large majority of the growth in state tourism has been in the cruise industry.

**TABLE 9 STATISTICS – DERIVING AN ESTIMATE OF THE NUMBERS OF OUT OF REGION VISITORS TO DILLINGHAM**

	Statistic(s)		Source	Notes
Out-of State Summer Visitors (Vacation, business, VFR, not seasonal workers)	Dillingham 1993 – 3,200	King Salmon 10,300	State DCED, AK Visitor Statistics Program – Patterns, Opinions & Planning	Only direct figures available; small sample size means accuracy is questionable
Statewide out-of-state Summer Visitors (May – Sept, all travel types)	1995 – 967,100 1996 – 1,064,300 (10% growth) 1997 – 1,120,600 (5% growth) 1998 – 1,163,700 (4% growth) 1999 – 1,199,000 (3% growth)		State DCED, AK Visitor Statistics Program (annual measurement of statewide visitors – no new data on visitor character since '93	Shows steady growth in out-of-state visitors statewide. Great majority of this growth was in cruise travel in SE, SCentral AK. Bristol Bay tourism likely grew much slower, if at all.
Annual Visits to King Salmon Visitor Center		1997 – 15,244 visitors 1998 – 15,198 1999 – 13,201 2000 – 14,357	Records kept by Angie Wagner, director	Shows high level of visitation possible when access is easy, no cost. Ratio of roughly 1 in 4 of all emplanements stopped at center
Airport Emplanements (person arriving, depart- ing on a scheduled commercial flight)	Dillingham 1998 - 42,000 1999 - 45,000	King Salmon 51,000 49,000	State DOT/PF, Dan Golden, Carl Siebe, Div. of Statewide Aviation 269 0730	Emplanements include all categories of users – residents, seasonal workers and tourists. Figures indicate upward trend at Dillingham
Togiak Nat'l Refuge Kanektok, Togiak, Goodnews R. Users		1997 – 2,289 river users 1998 – 2,207 1999 – 1,980	USFWS, Alan Miller, Togiak Refuge, Dillingham	Indicates stabilization of sportfishing efforts in Togiak Refuge. A Miller estimates this is 90% of refuge use.
B. Bay Angler Days (at least part of one day fishing)		1993 – 102,003 angler days 1997 – 90,793 1998 – 88,408 1999 – 105,270	Alaska Dept of Fish and Game Annual reports	Peaked in 95, grew again since 97. Nushagak doubled from 97 to 98.
Bed & Breakfasts; Rooms Available in Dillingham		1993 – no B&B's, +/- 60 rooms 2001 – no B&B's, +/- 100 rooms	CB guesses, check with Lois Sorenson, Alice Ruby	Significance unclear – likely cause in increase in Dillingham-based unguided fishing, business travel
Best Guess re Total Number of Out of Region Visitors to Dillingham (year round, Alaskans + out of state)		6,000-10,000	Chris Beck & Associates, reviewed with Alice Ruby (Bristol Inn), Wendy Hladick (Chamber)	Estimate reflects assumption of slow, limited growth in out of state visitors, since 93, plus in-state travelers.

## DILLINGHAM VISITOR MARKETS – TYPES OF TRAVELERS, REASONS TO TRAVEL

The figures below present characteristics of out-of-state travelers to Alaska, and in comparison, travelers to Bristol Bay and Dillingham. Dillingham visitors fall into the 4 major categories shown below: hunting and fishing, business, VFR, and wildlife/scenery/culture. One implication of this data: Dillingham is missing the two largest, fastest growing parts of the Alaska travel marketplace: visitors coming for Wildlife/Scenery/Culture/Adventure travel (rather than fishing), and package tours, including the land-based components of cruise travel.


Travel Category	To <u>Alaska</u> (out of state, summer)
<b>Travel Purpose</b>	
Vacation Pleasure	71%
Visiting Friends and Relatives	11%
Business Only	10%
Business & Pleasure	7%
Seasonal Worker	2%
<b>Travel Type</b>	
Package (prearranged tours)	45
“Pure” Independent	41%
“Inde” Package (independents who purchase package trips while traveling)	14%
<b>Activities Engaged in</b>	
Hunting/Fishing	<20%
Nature/Culture/Adventure Travel	>90%
<b>Origin</b>	
In-state Travelers/residents of Alaska	NA
International Travelers	8%
<b>Demographics</b>	
Average Age	50
Gender	53% male, 47 female
Percent with college grad or greater	52%

Source: Alaska Visitor Statistics Program – 1993 data (most recent survey data)

Travel Category	To <u>Dillingham</u> (out of region visitors, yr round)
<b>Travel Purpose</b>	
Hunting /Fishing	75-80%
Business	10%
Visiting Friends & Relatives	5%
Nature/Culture/Adventure Travel	5-10%
<b>Travel Type</b>	
Most fishing travelers come on packaged multi-day fishing trips.	
<b>Activities Engaged in</b>	
See above	
<b>Origin</b>	
In-state travelers/ AK residents	? 25%
International Travelers	? 15%
<b>Demographics (SW AK Region)</b>	
Average Age	46
Gender	73 %male, 27 female
Percent with college grad or >	62%

Source: estimates, based on familiarity with the area and discussions with the Chamber of Commerce, representatives of local business (Wendy Hladick, Alice Ruby, Lois Sorenson, Karen Roberts). SW “demographics” – 93 AVSP

## SUMMARY: DILLINGHAM CENTER TARGET TRAVELLER MARKETS

Market	Status In Dighm Area	Importance to Planned Center/ Strategies To Increase Visitation
1. <u>Fishing and Hunting</u> - Bristol Bay has over a 100 lodges & camps plus dozens of float trip guides catering to clients paying \$3000-\$6000 week for high-quality, wilderness fishing and hunting.	Rose steadily through the mid-90's, and since has stabilized or fallen.	<ul style="list-style-type: none"> <li>- large majority of current Bristol Bay visitors</li> <li>- prescheduled trips with little slack time; but lodge operators see growing interest in more diverse menu of activities, including wildlife, culture</li> <li>- spouses good target, option for bad weather days.</li> <li>- best option is prescheduled visits on way in/out (e.g. Crystal Ck. Lodge)</li> <li>- <u>need to develop programs, exhibits specifically of interest to this mkt.</u></li> </ul>
2. <u>Business Travelers</u> – two part market. One part is meeting market, discussed in previous section. Other is incidental visits associated with business trips.	Growth generally tied to overall population & economic growth.	<ul style="list-style-type: none"> <li>- consistent, modest, year round demand</li> <li>- opportunities to “capture” people taking part in meetings</li> <li>- good opportunities for craft and gift sales</li> <li>- check significance in other communities</li> <li>- <u>need to develop programs, exhibits specifically of interest to this mkt.</u></li> </ul>
3. <u>Visiting Friends and Relatives</u> (VFR's)	Growth tied to region population growth.	<ul style="list-style-type: none"> <li>- Minor but important market. Many people have in-state family connections.</li> <li>- Need programs giving incentives to local residents to bring their friends and relatives (e.g. discounted/free tickets to locals who brings relatives).</li> </ul>
 4. <b><u>Nature/Culture/Adventure</u></b> - activities ranging from passive tours (scenery, wildlife viewing) to “soft” and serious adventure <ul style="list-style-type: none"> <li>• Package Tours A: scheduled stopoff on multiday tour (like Sky Trekking; Karen Roberts)</li> <li>• Package Tours B: multiday programs based from the center</li> <li>• independent travelers</li> <li>• international (tour and independent travelers)</li> </ul>	Biggest, fastest growing segment of Alaska travel market <ul style="list-style-type: none"> <li>- very few today</li> <li>- none today</li> <li>- very few today</li> </ul> relatively high % of total BB visitors	<ul style="list-style-type: none"> <li>- requires having (or creating) a strong draw, or package of draws (Katmai yes, not yet Wood Tikchiks or Togiak Walrus)</li> <li>- very competitive market (</li> <li>- potential for large share of admissions revenues</li> <li>- Nome/Kotzebue, Barrow successfully serve this market (arctic circle draw).</li> <li>- requires proactive planning, multi-year effort, partners with airlines, others.</li> <li>- Crow Canyon NM, Dig Afognak, Elderhostel show this is a successful model</li> <li>- requires quality program, and in particular, quality instructors/guides</li> <li>- requires more developed infrastructure: outfitters, camping, hiking, boating</li> <li>- requires aggressive marketing to get Dillingham/Bristol Bay “on the map”</li> <li>- good demographic fit: longer trips, interest in off the beaten track destinations</li> <li>- anecdotal evidence: half all visitors to Valley of 10,000 smokes are intern'l visitors</li> </ul>
5. <u>Alaskans</u>	Fishing, VFR	<ul style="list-style-type: none"> <li>- tough market: frugal and have lots of less expensive options</li> <li>- explore partnerships though cultural exchange (e.g. schools, events)</li> </ul>

## **APPENDIX B**

### **Descriptions and Lessons Learned from Other Cultural Facilities in Alaska**



## Bristol Bay Visitors Council - Cultural Centers/Museums Project - Case Studies

### ALUTIIQ MUSEUM - Kodiak

**Mission / Goals:** preserve traditions and promote awareness of cultural legacy of indigenous people of Gulf of Alaska region. Carry out research, and share ongoing results through exhibits, events, publications, and educational outreach.

Program/Facilities	“Market”/Users	Governance/Staff	Finance
<p>Museum with exhibit space, climate-controlled repository, lab, office and gift shop. Holds over 100,000 artifacts in over 400 collections.</p> <p><u>Museum occupies 4600 SF middle floor</u> of 3-floor building. Space includes 1500 SF gallery w/ store, 1600 SF repository, 1000 SF lab, plus 500 SF for offices, restrooms. Upper floor is Native Corp. office; basement is open. Whole building may ultimately be used for museum functions.</p> <p><u>Extensive community outreach programs</u>, research, education, newsletter, archeological services &amp; volunteer programs.</p> <p>Opened May 1995.</p>	<p>Museum open to visitors. <i>Most use, however derives from interest by locals</i>, particularly schools (1500 school kids/year), Kodiak’s 15,000 population provides a strong support base. Regular use of facility by conferences, such as recent Youth/Elders Conference. <u>9,000 average annual visitors.</u></p> <p>Museum works with outlying villages, providing lectures, support for artists, traveling exhibits, and other services.</p> <p>Museum sponsors very popular, archeological dig project each year, located on road system, staffed by a combination of volunteers and professionals</p>	<p>Governed by 8 person Alutiiq Heritage Foundation Board (representatives of Native regional for-profit and non-profit corporations plus 6 village corps). KANA - regional non-profit organization - is umbrella organization for museum, and owns museum building.</p> <p>Five full time staff, plus seasonal staff, interns, volunteers. includes:</p> <ul style="list-style-type: none"> <li>- business mgr (store, payroll..)</li> <li>- curations mgr (exhibits, education)</li> <li>- collections manager</li> <li>- program mgr. (events, newsletters)</li> <li>- admin. assistant</li> <li>- part time, permanent curation asst.</li> </ul> <p>Large membership in museum association (local, statewide, nat’l).</p>	<p><u>Capital</u> costs: Museum portion of the building, furnishings cost \$1.5 million, funding provided by EVOS Trustee Council.</p> <p><u>Operating budget approx \$300,000 per year.</u> Bulk of funding (approx. \$200,000) comes from annual donations of 8 corporate founders (\$50K each in year 1, now \$20K). Staff raises \$60-70,000 through grants, consulting services, memberships. Gift store, recently reorganized, is expected to provide revenue too. KANA shares 25% of bingo receipts (\$50,000) pays rent. Gate receipts (<u>\$2 per</u>) provide less than 5% of annual operating costs.</p>

**Bristol Bay Visitors Council - Cultural Centers/Museums Project - Case Studies**  
**MUSEUM OF THE ALEUTIANS – Unalaska**

Program/Facilities	“Market”/Users	Governance/Staff	Finance
<p>This <u>9,400 square foot</u> museum is the only arch-aeological research, museum storage facility for the Aleutian Region. Houses 400,000 objects; 90% are archeological, 10% are historic/ ethnographic.</p> <p><i>Facility Includes:</i></p> <ul style="list-style-type: none"> <li>*3 galleries: permanent &amp; special collections, and a gallery for changing exhibits.</li> <li>*Lab space easily converted into classroom or public presentation space.</li> <li>*Storage area with space-saver moveable shelves – where “digging” gear and office equipment are stored.</li> <li>*A huge cargo-bay door for receiving large items</li> <li>*Air exchange system, which continuously filters the air, has its own room.</li> <li>*A gift shop and offices for the Director, curator, and one other person.</li> <li>*A dark room</li> <li>*2 restrooms for staff and public use.</li> </ul>	<p><i>Summer hours:</i>  Jun 1-Sept 30, 7 days/week  Mon-Sat 10am-5pm; Sun noon-5 pm.</p> <p><i>Winter hours:</i>  Oct 1-May 31; W-Sun 11-4.</p> <p><u>Average 10 visitors a day.</u>  Estimate 3000-4000 year?</p> <p>User groups include school children, community members, seniors, tourists, large transient population during fishing season.</p> <p>Unalaska is a final destination for cruise ships - some days in summer as many as 200 passengers from a ship will visit.</p> <p>The State Ferry from Kodiak also brings visitors once a month. On days when the ferry comes in at 6:30 am, they open the museum early to accommodate the visitors.</p>	<p>Museum is a private, non-profit corporation, governed by a 7-member Board of Directors, representing the public at large, the Qawalangin Tribe, Aleut Corporation, City of Unalaska, Ounalashka Corporation.</p> <p><i>Staffing:</i></p> <ul style="list-style-type: none"> <li>- Director (full time)</li> <li>- Collections Mgr (fulltime)</li> <li>- Bookkeeper (part time)</li> <li>- Business and Resource</li> <li>- Administrator (recently let go due to budget constraints)</li> </ul> <p>The City and the Board made an agreement when the facility was planned. The city would support with help for personnel costs for five years. The Board had to agree to ask the City for 10% less each year for 5 years and eventually become self sufficient.</p>	<p><u>Estimated operating budget: \$500,000.</u></p> <ul style="list-style-type: none"> <li>*50% funded by grants and corporate donations;</li> <li>*10% from membership (Total members=190)</li> <li>*10% from Gift store receipts</li> <li>*30% raised with local telethons in the fall, raffles and other fundraisers.</li> </ul> <p><u>Admission Price : \$2</u></p> <p><i>Memberships:</i></p> <ul style="list-style-type: none"> <li>Sponsor-\$5000</li> <li>Life-\$1,000</li> <li>Corporate-\$1,000</li> <li>Family- \$75</li> <li>Individual- \$25</li> <li>Student/Senior-\$5</li> </ul> <p>The City owns the building.</p> <p>The center receives city assistance for operating funds. Native Corporations have also committed to certain levels of annual support.</p> <p>This is a \$4 million dollar facility</p>

## MUSEUM OF THE ALEUTIANS – Unalaska (continued)

Program/Facilities	“Market”/Users	Governance/Staff	Finance
<p><u>Extensive</u> community outreach programs including an archaeological field school, a museum in the school program, University classes and ongoing effort to encourage community involvement and volunteerism at the facility.</p> <p>Interactive displays, such as the recent 20 foot dory exhibit where children could climb on, play and learn to paddle the boat</p> <p>Off-season activities include “winter projects” like cleaning and cataloging artifacts. During school sessions, local teachers work with staff to do classroom projects at the facility.</p> <p>Opened: August 1999</p> <p>Located on the Shore of Margaret Bay</p>	<p>Student interns and visiting professors from all over the world spend time here to take part in the archaeological digs and field schools, sponsored by the museum.</p> <p>Museum staff works with other communities to provide slide presentations, traveling exhibits and interactive displays.</p> <p>They do not have any way to track how many locals and how many visitors come to the facility. Nor do they know how many are paying vs. non-paying visitors</p>	<p>Volunteers from the community and students are recruited to help clean, and catalog the artifacts in the off-season and they assist with “digs.” Student interns also assist with field work.</p> <p>Finding funds to operate is not easy. They are currently working to obtain some archeological contracts which will be a major source. They are also starting a grant writing committee with folks from the community to pursue alternative sources of funding through grants.</p> <p>They are having a difficult time finding people to volunteer as docents, and to sit at the front desk for full shifts. They attempted to form “Friends of the Museum” twice with little success.</p>	

## **Additional Information – Museum of the Aleutians**

Facility address:

Museum of the Aleutians P.O. Box 648 Unalaska, Alaska 99685-0648  
phone: (907) 581-5150 fax: (907) 581-6682 [www.aleutians@arctic.net](http://www.aleutians@arctic.net)

\*When asked what suggestions Belinda had for others considering the same type of museum/ cultural center enterprise she shared:

“Make sure the bathrooms are closer to the offices” This place is huge and we have to walk a really long ways to get to the bathrooms.”

“The interactive displays are by far the most popular. It especially engages the children and students in the community and in turn- their parents”

“An interesting twist for native culture centers or museums, in the 21st century- is purchasing artifacts on “E-Bay”. This allows instantaneous purchase and has resulted in some absolutely incredible finds.! For example, one woman had advertised the “largest living Aleutian Basket on line” for sale. The director of he museum bid on it and won! When the woman found out there was actually a Museum of the Aleutians, she donated it! The world wide web has created an excellent resource for obtaining otherwise “unknown or unfindable” artifacts.” This access also raises some ethical issues for some.

Source of information: Interview July 7, 2000 with Belinda at the Museum of the Aleutians:

July 27, 2000 Update: Conversation with Ann Rowland: [rowland@aleutians.org](mailto:rowland@aleutians.org)

Suggestions for new facility: Keep in mind that locals will not donate items until you prove yourself reliable in the community. In order to accommodate those kinds of donations “after the fact”– after the facility is opened, it would be wise to allow yourself plenty of \$ and space for flexibility– You never know what kind of “treasures” you will need more room or special space for. Set aside \$ in your budget for new exhibits. Take time to settle into your new building, allow visitors to come, see what works and then make more final decisions.

## Bristol Bay Visitors Council - Cultural Centers/Museum Project- Case Studies

### INUPIAT HERITAGE CENTER (Barrow)

**Mission:** to provide a place where the language and knowledge of the Inupiat people can be passed on to North Slope residents. The philosophical foundation is based on the ancient qargi, or community house, where activities took place.

Program/Facilities	“Market”/Users	Governance/Staff	Finance								
<p>This facility occupies 30,000 total square feet, in two sections: the community library and the museum.</p> <ul style="list-style-type: none"> <li>- multipurpose room: seating for 128 people w tables, 150 without</li> <li>- small conference rooms: 10 small conference sessions at one time.</li> <li>- huge garage: large projects such as repairing the skin boats and large carvings.</li> <li>- main room: a large gathering/meeting space including a big screen and a “middle place” which is set up for audio and visual taping.</li> <li>- tradition room for teaching dances, skin sewing, filming elders</li> <li>- museum and heritage center together house over 24,000 items</li> </ul>	<p>Hours of operation: 8:30 am-5:00 weekdays, year round</p> <p>Users first year of operation: 8,000 tourists / 12,000 local</p> <p>Other User-groups include:</p> <ul style="list-style-type: none"> <li>- School children: scheduled visits to learn the traditional sewing of waterproof skins.</li> </ul> <p>Museum staff works with all schools on topics that affect the Inuit way of life, also field research on climate change. Partners include UAFMuseum, Scandia Laboratories, Univ. of San Diego. &amp; the Barrow Arctic Science Consortium.</p> <p>Community groups, dancers, church groups hold meetings at the facility. Community outreach includes “visioning” with the outlying villages to help their residents identify existing resources, how to deal with things like language barriers, or with big city issues when they travel.</p>	<p>The Center is governed by the Ilisagvik College Board of Trustees, under the direction of the President, Vice-President. The operations are guided by the Ilisagvik College and under contract with the North Slope Borough.</p> <p>The Commission on Inupiat History, Language and Culture staff are authorized space only as tenants and report directly to the NSB Planning Director.</p> <p>There have been efforts to coordinate activities with the IHLC, but there is a reluctance to do so on their part. The Director is responsible for the overall facility operations</p> <p>The two organizations report to different entities. IHC staff report to the College and the IHLC staff report to the NSB Planning Department under the Mayor’s administration.</p>	<p>The museum is expected to operate staffing by solicitation of contributions or grants entirely, which is a problem at this time. The first year budget called for \$1.5 million, the actual <u>operating budget</u> was \$480,000, raised from grants, local fundraising.</p> <p><i>Admission Prices:</i></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">Adults</td> <td style="text-align: right;">\$5.00</td> </tr> <tr> <td>High School &amp; College</td> <td style="text-align: right;">\$2.00</td> </tr> <tr> <td>Children (6-14)</td> <td style="text-align: right;">\$1.00</td> </tr> <tr> <td>Children, Seniors</td> <td style="text-align: right;">Free</td> </tr> </table> <p><i>Room Rentals:</i></p> <p>Multipurpose Room \$250/day \$37.50 / hour</p> <p>Class Rooms \$100/day \$75.00/ ½ day</p> <p>Traditional Room - open to public, local schools , free</p> <p>*Renter is responsible for take down and setting up expenses *No memberships at this time.</p>	Adults	\$5.00	High School & College	\$2.00	Children (6-14)	\$1.00	Children, Seniors	Free
Adults	\$5.00										
High School & College	\$2.00										
Children (6-14)	\$1.00										
Children, Seniors	Free										

**INUPIAT HERITAGE CENTER (Barrow) – (continued)**

<b>Program/Facilities</b>	<b>“Market”/Users</b>	<b>Governance/Staff</b>	<b>Finance</b>
<p>Exhibits focus on whaling and cover a time span of 3,800 years. There are 14 different exhibits located throughout the facility. The main hall has art from the North Slope area. The Main Lobby houses “Village Profiles.” The main exhibit room takes a visitor back in time to the Ice Age with bones of the animals living in that era and information about the development of the whaling culture. A very popular exhibit is “Arctic Leaders”, a photo essay of village leaders.</p> <p>Programs are designed to “fit the season.” February and March are popular because work is done on the skin boats (umiaqs). Boats are brought in to the “Traditional Room” for replacement of old skins or repair, in preparation for the whaling season. local collections. The facility opened in February 1999.</p>	<p>There is a daily craft sale at the facility - the gift shop is not scheduled to open in the near future.</p> <p>Tundra Tours operate a daily cultural program from noon-1:30 every day from May 15<sup>th</sup> to September 15<sup>th</sup>.</p>	<p>The person in charge of collections actually works for the Commission on Inupiat History, Language and Culture.</p> <p>Plans have been drafted to include the following staff: A full time curator, a full time registrar, a program assistant, a Director, a Cataloger, Conservator and other museum personnel to operate this facility.</p> <p>Experience shows that many of the 19 or so standard positions can be combined to accommodate the operations efficiently.</p> <p>Custodial work and maintenance is done by the North Slope School District.</p> <p>A tour guide with “Tundra Tours” leads the daily guided tours through the museum</p>	

## **Inupiat Heritage Center (Barrow) Additional Information**

The facility is located at:  
3241 North Star Street  
Across from the new AC Stuaqpak store, and next to the Senior Citizens Center

Mr. Brower's suggestions for other facilities: Make sure you have enough storage for your collections, you need access for incoming exhibits, and moving from the preparation room to exhibit rooms- leave room to move large objects over 20-30 feet. Oversize doors are a must for prep and exhibit rooms.

Chris S., shared in our initial conversation that there had been some organizational and management problems and the curator had resigned. There seems to be some confusion about who has the final authority and control when it comes to the museum and the housing of collections and placement of artifacts.

Exhibits include two sod houses, a small collection from Dr. Kramer, a photographic and audio collection from elders in the community- audio and video recordings of stories and legends- also all the conference materials and proceedings from the elder-youth conferences- which are currently being transcribed. Additionally, there is a photo collection donated by natives who have lived in the area for a long time. The collections on hand are primarily from North Slope digs. There are many donated and loaned materials on display in different exhibit areas.

The Center works with and coordinates with the UAF Museum, the Anchorage Museum and the Smithsonian to house loaned materials. Each month, a science and cultural lecture related to the Arctic environment, cultural finds, Inuit culture and present day events that impact the Inupiat way of life, is scheduled.

A new program- "a time to share, a time to learn"-is a community based series with elders and whalers coming in to the facility to present talks about their life experiences. This has been very popular with school aged children.

Similar programs planned for the future include traditional crafts, elders and artists-in-residence, kayak building and baleen crafts.

Information Sources: - Chris Savok, collections manager at the IHLC 852-4594  
- Ron Brower Sr., Director, Inupiat Cultural Center  
P.O. Box 75, Barrow Alaska 99723 , (907) 852-4594, [www.co.north-slope.ak.us/ihlc/](http://www.co.north-slope.ak.us/ihlc/)  
- Francine Hopson-Rochon, Program Assistance, [Fhopson@InupiatResearch@ilsagvik](mailto:Fhopson@InupiatResearch@ilsagvik)

**Bristol Bay Visitors Council - Cultural Centers/Museum Project- Case Studies**  
**YUPIIT PICIRYARAIT CULTURAL CENTER AND MUSEUM (YUP'IK MUSEUM & GIFT SHOP)-BETHEL**

Program/Facilities	“Market”/Users	Governance	Finance
<p>This museum is located within a 18,000 square foot cultural center and houses approximately 500 pieces of art, pictures and artifacts. The areas related to the museum -storage, arts and crafts, and offices total 3,600 square feet.</p> <p>Facility includes:</p> <ul style="list-style-type: none"> <li>• main room- 50' x 30'</li> <li>• 3 galleries- 30' x 40'</li> <li>• Gift shop- 40' x 20'</li> <li>• 2 offices- 10' x 15'</li> <li>• restrooms</li> <li>• 3 storage areas, room for supplies, one which is set up for items needing special lighting and air circulation.</li> <li>• conference room with a small kitchen off to the side.</li> </ul> <p>2 galleries display the permanent exhibits of Ahtabascan, Cup'ik and Yup'ik people of the Yukon-Kuskokwim Delta in ancient and contemporary times. The 3<sup>rd</sup> gallery is reserved for short term exhibits that include some native collections.</p> <p>The most popular exhibits with local and regional visitors are school district art shows (3 x a year), Life and Time of St. Innocent, Photos of Region, and art shows. The tourists gravitate toward the permanent exhibits such as clothing, implements and objects of transport of the region.</p> <p>Located @ 420 Chief Eddie Hoffman (State) Highway  Museum opened: March 1995  Gift Shop opened: October 1995</p>	<p>Hours of operation are Tues-Saturday, noon-5 pm Year round.</p> <p>Total visitors per year=20,000 Majority of visitors are from the region; outside visitors account for about 2,000 each year.</p> <p>Elders and other community members often come in to do presentations on various native arts and crafts and talk about the history of the artifacts. Very few tourist groups visit.</p> <p>Students from the school sometimes come on field trips</p> <p>Health care organizations often sponsor conferences.</p> <p>University students do some research.</p> <p>Community groups use the facility for meetings about 3-5 times a month.</p> <p>Museum sponsors traveling exhibits such as the current collection of pictures from the Alaska Council on the arts.</p>	<p>The Board of Directors for the Cultural Center is the Association of Village Council Presidents.</p> <p>Staffing includes:</p> <ul style="list-style-type: none"> <li>*one full time curator</li> <li>*2 part time staff which share attendant and gift shop duties as well as custodial work.</li> <li>*There is one volunteer who comes in on a regular basis.</li> </ul>	<p>There is no admission fee however donations are accepted. Visitors usually average a \$1.00 donation when they visit.</p> <p>The Yup'ik Museum and Gift Shop advertises on their web home page that anyone interested in purchasing native arts and crafts, or having an item custom made can “click here” and order whatever they want.</p> <p>This building was the result of a huge coordinated effort, but eventually the cost burden was shared between UAA and AVCP. The Building is worth \$6.15 million.</p> <p>The Museum costs approximately \$500,000 to operate. Special projects vary on the size of the project. The most expensive project we had was \$35,000 with village travel for 45 people.</p>

## **Additional Information - Bethel**

July 7, 2000-

Source of Information:

Interview with Aaron, an attendant at the Museum. He has only been there since April, so the amount of information he shared was limited. Joan Hamilton is the curator and will return Thursday July 13th

Aaron did not have information about the budget or where they received funding; how they were governed and was not sure about some of the other operational details. He was going to look for a brochure but did not believe there was one available.

Facility Address:

Yup'it Piciryarait Cultural Center and Museum  
P.O. Box 219  
Bethel Alaska 99559  
(907) 543-1819 Fax: (907) 543-1885

Bob Charles, of the Association of Village Council Presidents is listed as a contact person in the directory of participants from the 1998 Planning and Management Seminar in Anchorage.

July 27, 2000 Update- email from Joan Hamilton:

(See updated information-

She believes the biggest challenge is how to include villagers in the planning and have the collection be readily available to them. She wonders how villagers will be incorporated in this plan?



## **APPENDIX C**

### **Building Program Analysis: Comparative Space Needs Study**

**DILLINGHAM CULTURAL HERITAGE CENTER  
COMPARATIVE Space Needs Study - May 2002**

Program	BIG			SMALL			MEDIUM			US-FWS
	P	SF/P	SF	P	SF/P	SF	P	SF/P	SF	
<b>MEETING / CULTURE</b>										
Formal seating	75	12	900	50	12	600	50	10	500	
Raised platform/stage			750			400			500	
Non secure gallery/open	75	18	1,350	50	18	900	75	15	1,125	
Multi-Purpose Room	150	18	2,700	100	18	1,800	125	15	1,875	
Audio/visual room			150			100			100	
Food service			300			200			200	
Large Classroom			Exhibits			Exhibits/Gallery			Exhibits/Gallery	
Small Classroom			Exhibits			Lobby/Confer.			Lobby/Confer.	
Green room			250			200			250	
Dressing rooms			gross			gross			gross	
Storage			gross			gross			gross	
<b>Pers/Subtotal (NSF)</b>	<b>300</b>		<b>6,400</b>	<b>200</b>		<b>4,200</b>	<b>250</b>		<b>4,550</b>	
<b>Gross Factor</b>	<b>35%</b>		<b>2,240</b>	<b>30%</b>		<b>1,260</b>	<b>30%</b>		<b>1,365</b>	
<b>Subtotal (GSF)</b>			<b>8,640</b>			<b>5,460</b>			<b>5,915</b>	
<b>EXHIBIT / CULTURE</b>										
Crafts Shop			500			300			400	
Secure Gallery	25	30	750	15	30	450	15	30	450	
Artifacts Laboratory			300			200			200	
Collections Storage			300			200			200	
Cultural Center Offices	2	120	240	2	120	240	2	120	240	
Exhibits workshop and preparation area			300			200			200	
Large Classrm./breakout A	30	30	900			S. Gallery			S. Gallery	
Small Classrm./breakout B	15	30	450			Conference			Conference	
<b>Subtotal (NSF)</b>	<b>72</b>		<b>3,290</b>	<b>17</b>		<b>1,590</b>	<b>17</b>		<b>1,690</b>	
<b>Gross Factor</b>	<b>30%</b>		<b>987</b>	<b>25%</b>		<b>398</b>	<b>25%</b>		<b>423</b>	
<b>Subtotal (GSF)</b>			<b>4,277</b>			<b>1,988</b>			<b>2,113</b>	

**COMPARATIVE Space Needs Study - page 2 of 3**

Program Space Type	BIG			SMALL			MEDIUM			US- FWS
	P	SF/P	SF	P	SF/P	SF	P	SF/P	SF	

**VISITOR CENTER / GIFT SHOP / LOBBY**

Visitor Interpretive Center	20	30	600	15	30	450	15	30	450	
Gift Shop			300			200			200	
Lobby	20	40	800	10	40	400	10	40	400	
Rest rooms			gross			gross			gross	
Coat room			gross			gross			gross	
Center Management Offices	2	120	240	0	120	0	0	120	0	
Chamber of Commerce Offices	2	120	240	1	120	120	1.5	120	180	
<b>Pers/Subtotal (NSF)</b>	44		2,180	26		1,170	27		1,230	
<b>Gross Factor</b>	25 %		545	25%		293	25%		308	
<b>Subtotal (GSF)</b>			2,725			1,463			1,538	

**EDUCATION / CLASSROOMS**

Library expansion			Sam Fox Museum			Sam Fox Museum			Sam Fox Museum	
UAF/BBC Learning resource center	20	30	600							
<b>Subtotal (NSF)</b>			600							
<b>Gross Factor</b>	30 %		180							
<b>Subtotal (GSF)</b>			780							

**BUILDING SERVICES**

Storage			gross			gross			gross	
Outdoor storage			gross			gross			gross	
Mechanical room			300			200			250	200
Service closets			gross			gross			gross	
<b>Subtotal (NSF)</b>			300			200			250	200
<b>Gross Factor</b>	10 %		30	10%		20	10%		25	20
<b>Subtotal (GSF)</b>			330			220			275	220

**COMPARATIVE Space Needs Study - page 3 of 3**

Program Space Type	BIG			SMALL			MEDIUM			USFWS	
	P	SF/P	SF	P	SF/P	SF	P	SF/P	SF	SF	SF
<b>LEASEABLE OFFICE AREA</b>											
<b>Curyung Tribe</b>											
Offices	6	120	720			0					0
<b>Community services</b>											
Offices	8	120	960			0	6	120	720		0
<b>USFWS</b>											
Offices	22	120	2,640			0	22	120	2,640		2,640
Larger Offices	3	240	720			0	3	240	720		720
Reception area			540			0			540		540
Mail room			180			0			180		180
Library			450			0			450		450
Biologist / Speciman Lab.			450			0			450		450
GIS Room			200			0			200		200
LE Room			120			0			120		120
Kitchen/Food service			Meeting			Meeting			Meeting		Meeting
Meeting room			Shared			Shared			Shared		Shared
Storage			Shared			Shared			Shared		Shared
Map room			100			0			100		100
Radio/Expediter			100			0			100		100
Visitor Interpretive Center			Visitor Center			Visitor Center			Visitor Center		Visitor Center
Computer lab			200			0			200		200
2 bathrooms			Shared			Shared			Shared		Shared
Work Center			180			0			180		180
Storage			Shared			Shared			Shared		Shared
<b>Shared Spaces</b>											
Meeting Room			480			0			200		200
Copy/work room			200			0			0		0
Storage			200			0			0		0
Rest rooms (2)			200			0			200		200
<b>Pers/Subtotal (NSF)</b>	39		8,640			0	31		7,000		6,280
<b>Gross Factor</b>	15%		1,296			0	15%		1,050		942
<b>Subtotal (GSF)</b>			9,936			0			8,050		7,222
<b>TOTAL NSF</b>											
			<b>21,410</b>			<b>7,160</b>			<b>14,720</b>		<b>6,480</b>
<b>TOTAL GROSS FACTOR</b>											
			<b>5,278</b>			<b>1,970</b>			<b>3,170</b>		<b>962</b>
<b>TOTAL GSF</b>											
			<b>26,690</b>			<b>9,130</b>			<b>17,890</b>		<b>7,440</b>

