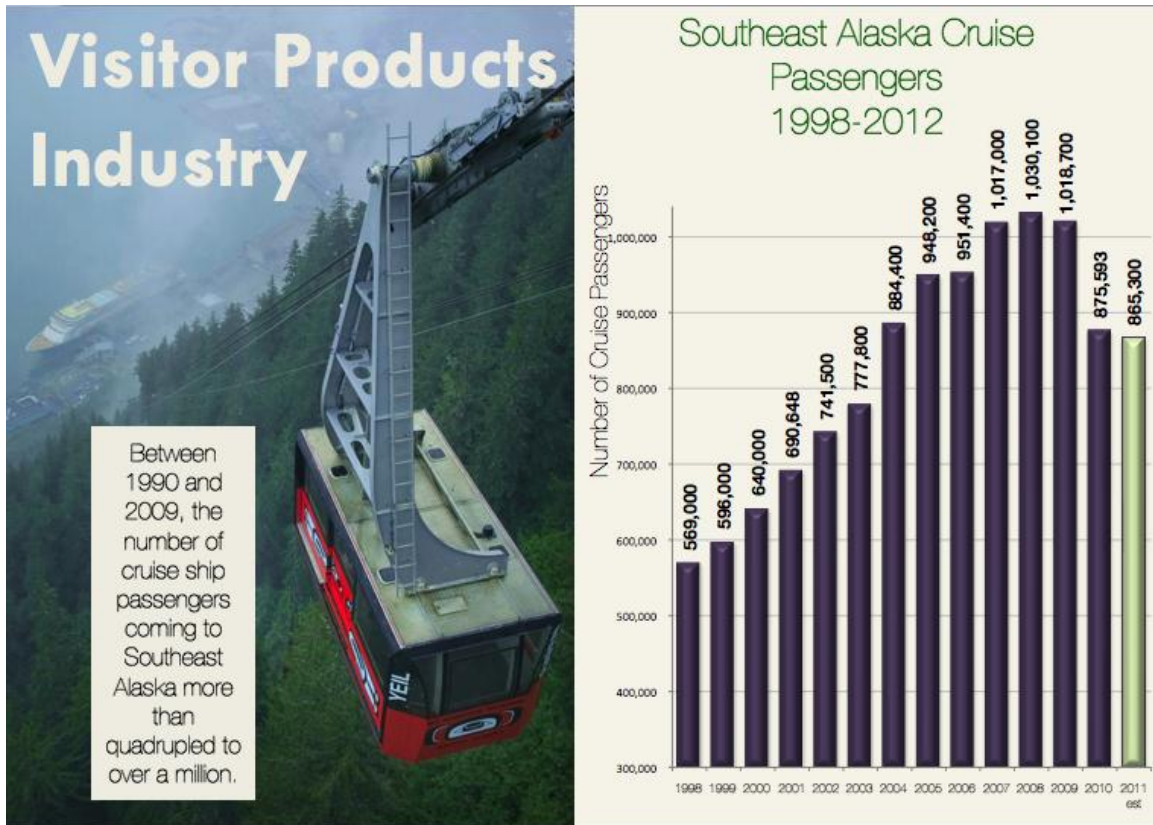


Southeast Alaska Visitor Products



The Visitor Products Industry Cluster, as defined by the NAICS codes in the Southeast Alaska Visitor Industry Cluster chart below, is the largest private sector regional employer in term of employees, accounting for 15% of all regional employment; and the second largest in terms of wages, accounting for 10% of all regional wages (second to the seafood industry).

The cluster accounted for 5,689 annual average jobs in 2009 and paid \$151.5 million in wages through more than 600 various businesses. The average wage for this sector was \$26,624—although jobs with less than 40 hours per week are measured the same as full time jobs—so the lower wages could be partly due to a high number of part-time jobs. Seasonal jobs are correctly measured as seasonal.

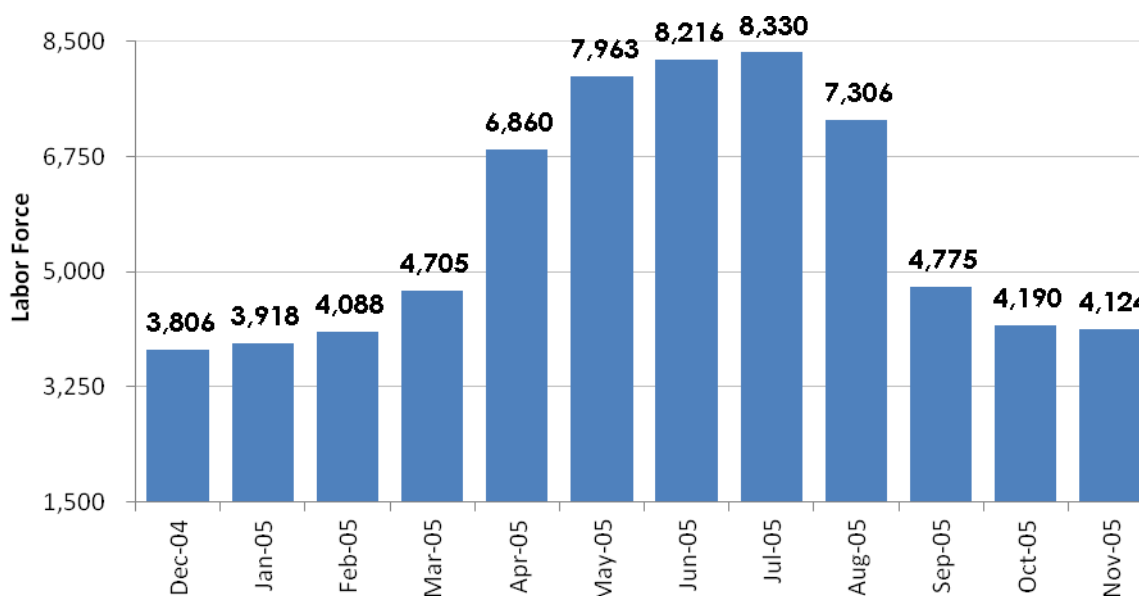
Southeast Alaska Visitor Industry Cluster

Sector Name	NAICS Industry Code	Annual Average Monthly Employment † 2003	Annual Average Monthly Employment † 2009	SE Businesses 2009	Total SE Wages 2009	Avg. SE wage 2009
Transportation and Tourism		3,175	3,225	312	\$109,505,610	\$33,953
Air transportation	481	702	716	39	\$26,690,965	\$37,295
Water transportation	483	262	268	19	\$15,859,978	\$59,124
Truck transportation	484	189	214	21	\$8,497,920	\$39,787
Scenic and sightseeing transportation	487	488	727	100	\$25,185,358	\$34,639
Support activities for transportation	488	321	207	26	\$10,300,807	\$49,762
Accommodation	721	1,213	1,094	107	\$22,970,582	\$21,005
Arts, Entertainment, Recreation, Food, Drink		2,287	2,464	289	\$41,956,506	\$17,028
Performing arts and spectator sports, Museums, historical sites, zoos, and parks	711 712	69	159	19	\$3,805,743	\$23,986
Amusements, gambling, and recreation	713	584	691	83	\$12,599,820	\$18,243
Food services and drinking places	722	1,634	1,614	187	\$25,550,943	\$15,833
Total Cluster		5,462	5,689	601	\$151,462,116	\$26,624

The reality is that this cluster could be slightly larger or slightly smaller than what is represented above. ADOL employment data does not include proprietors (self-employed workers), including guides, bed & breakfast operators, charter-boat operators and any other person operating a business that does not report itself. At the same time, some of the businesses included are likely not to be involved in the visitor industry.

As previously discussed, the regional economy is seasonal, and this is very much the case in the visitor industry. The chart below presents the data above on a monthly scale. Employment is at its lowest in December with fewer than 4,000 employees, and it peaks in July, with 8,330.

Southeast Alaska Visitor Industry Employment by Month, 2009



Visitor Products as an Economic Force in the Regional Economy

In the last decade, tourism as a whole has been the fastest-growing industry in Southeast Alaska.

The largest component of the Southeast Alaska tourism industry is the cruise ship industry, because the majority of the visitors coming to Southeast Alaska arrive by cruise ship. The number of cruise ship visitors to the region doubled between 1997 and 2007, when more than a million passengers visited the region. However, although, tourism in Southeast Alaska has been on a long upward trend, the number of cruise passengers visiting the region decreased by 15% over the past two years (2009 and 2010). This downward trend has been in response to the impact of the great recession globally on tourism and an Alaska head tax. Cruise visitor numbers are expected to decline by an additional one percent in 2012, or at best, hold steady, before an expected rebound in 2013. By tracking the number of cruise passengers to the region, the growth or decline of tourism overall can also be tracked.

In addition to the region's cruise passengers, Southeast hosts up to 200,000 independent travelers during the summer, and 30,000 during the winter and fall, according to the Alaska Visitors Statistics Program (AVSP). Visitors who travel to Southeast Alaska by air, ferry, or highway spend significantly more per person than cruise ship passengers in the region. Travelers coming to Southeast Alaska by air spend nearly twice as much per party as those arriving by cruise ship, while those arriving by ferry spent nearly three times as much.

Recreation is a key draw to Southeast Alaska for both residents and visitors alike. While residents and nonresidents use Southeast Alaska recreational resources quite differently, it is clear that

recreation opportunities in Southeast play a major role in terms of why people choose to live, work, or travel here. In the Southeast Alaska Business Climate Survey 2010, businesses ranked "recreational opportunities" as the most significant benefit towards operating business in Southeast Alaska.

Visitor Products Cluster Strategy Development Process

In March and April of 2011, the Juneau Economic Development Council convened a 35 member Visitor Products Cluster Working Group with representation from private industry, including private sector firms headquartered outside the region, firms headquartered in the region, and small local service providers; federal, state and local government agency representatives; tribal corporation representatives; university faculty; and local economic development entities. A full roster of the Working Group membership is below.

Southeast Alaska Visitor Products Cluster Working Group Membership*

Individual	Affiliation	Position
Linda Kadrlik	Adventures Afloat	Owner
Erica Simpson	Alaska Canopy Adventures	Juneau Manager
Michael Goldstein	Alaska Coastal Rainforest Center, University of Alaska, Southeast	Executive Director
Michael Neussl	Alaska Department of Transportation and Public Facilities	Deputy Commissioner for Marine Operations
Louis Juergens	Alaska Galore Tours	Owner
Odin Brudie	Alaska Office of Tourism Development	Tourism Transportation & Product Development
Tory Korn	Alaska Rainforest Sanctuary / Alaska Canopy Adventures	General Manager
Kelli Dindinger	Alaska Travel Adventures, Inc	President
Brent Fischer	City of Juneau	Incoming Director, Parks and Recreation
Marc Matsil	City of Juneau	Outgoing Director, Parks and Recreation
Carol Rushmore	City of Wrangell	Economic Development Director
Drew Green	Cruise Line Agencies of Alaska	Port Manager
John McConnochie	Cycle Alaska	Owner
Jon Martin	USDA Forest Service	Tongass Transition Framework Coordinator
Marti Marshall	Forest Service	Juneau District Ranger

***Attended one or more meetings**

Individual	Affiliation	Position
Sharon Gaipman	Gaipman Communications	Principal
Bob Janes	Gastineau Guiding	Owner
Sean Smith	Glacier Gardens	
Derek Duncan	Goldbelt	Vice President of Operations
Melanie Lesh	Gustavus City Council	Gustavus Visitor Assoc
Bill Hagevig	HAP Alaska-Yukon	Juneau Division Manager
Larry Gaffaney	Huna Totem Corporation	President, CEO
Jodi Wise	Huna Totem Corporation	Sitting in for Larry Gaffaney
Johan Dybdahl	Icy Strait Point	President
Linda Kruger	PNW Research Station, US Forest Service, Juneau Forestry Sciences Lab	Research Social Scientist
S. Kirby Day, III	Princess Cruises	Director of Shore Operations, Alaska and Pacific Northwest
Katherine Eldemar	Sealaska	Assistant to the President & CEO
Tim McDonnell	TEMSCO	Vice President
Forest Wagner	UAS Outdoor Studies	Program Director
Kathy DiLorenzo	UAS School of Professional and Technical Studies	Assistant Professor of Public Administration and MPA Director
Ernestine Hayes	UAS, School of Arts and Sciences	Assistant Professor of English
Rick Wolk	UAS, School of Management	Assistant Professor of Marketing & Entrepreneurship
Steve Krause	University of Alaska, Southeast	Dean, Professional & Technical Studies
Marsha Sousa	University of Alaska, Southeast	Dean, School of Arts and Sciences
Greg Brown	Weather Permitting Alaska	Captain

Over the course of three facilitated meetings and numerous between meeting teleconferences, this diverse group worked collaboratively to identify areas where opportunity for job creation and industry development may exist within this broad sector. In addition, the group identified opportunities for collaboration and partnership to overcome current constraints that stand in the way of business growth.

Southeast Alaska Visitor Products Industry Opportunities and Challenges

The cluster working group was asked to develop a list of the opportunities and challenges offered by the Southeast Alaska visitor products industry. The group developed the following list:

Opportunities

Increase numbers of independent/multi-day visitors, and marketing:

- Create and promote multi-day visitor packages – e.g., educational, lifestyle packages, outdoor recreation
- Better information, itineraries and promotion to link multi-community regional experiences
- Develop 'volunteer-tourism' opportunities
- Market Southeast as seafood capital of the world (like Napa Valley wine country)
- Find ways to bring Juneau and/or cruise ship visitors to smaller rural communities
- Incentivize a "step-on/step-off" program with cruise industry
- Market an 'add-a-day' program for cruise visitors
- Training on how to raise profile and hits on search engines
- Use internet/social media to showcase regional tourism opportunities
- Better information, itineraries and promotion to link multi-community regional experiences

Create new visitor experiences that build on authentic local assets:

- Develop Juneau as a mining and/or maritime and/or seafood destination
- Multi-agency and private sector partnering in an maritime interpretive center

Government assistance rather than impediment:

- Create a multi-agency one-stop permitting center
- Expedited permitting, at all levels
- Government needs to advocate for economic benefit of projects
- More convenient/less expensive access to the forest
- Allow use of more areas and of more former logging roads for commercial tourism opportunities
- Provide flexibility/local Forest Service control of fee structure, consider opportunities for in-kind efforts rather than fees
- Develop a team to allow permitting to happen more quickly
- Control fees: one operator states that permit fees have increased 800%

Infrastructure:

- Develop connections and links between region's trails
- Hut-to-hut trail systems, Juneau to Skagway trail, Treadwell Ditch trail

- More information centers to connect visitors to guides and trailheads (e.g., satellite visitor center on west side of Mendenhall Glacier)
- Bring broadband/high speed internet to rural communities so they can connect with markets and showcase tourism opportunities

Education and Training:

- Develop a UAS visitor industry management/training program or degree with government and private sector internships

Challenges

Obstacles and challenges cited by participants were grouped in categories; concerns related to the regional and business climate are most acute.

Regional Business Climate/Leadership

- Too parochial; we're always looking for someone else to blame and to solve our problems
- Not enough teamwork and cooperation within region
- Southeast culture is risk averse, we don't have an entrepreneurial spirit
- Business climate is in defensive/survival mode rather than in growth mode
- Leadership failure to get message out as to how important private sector is to economy of community/region
- State leadership shows no interest in/does not care about industry
- Everyone's time is engaged in their own communities and don't have time left to connect across communities; high cost of inter-regional travel limits communication
- Long time frame needed for change and don't have committed and persistent leadership to stay with initiatives over many years
- Local resident attitudes to industry are sometimes not favorable
 - Community attitudes – not willing to make changes
 - Lack of understanding in community about role tourism plays in providing quality of life to residents – quality of life wouldn't be available without visitor industry contribution
 - Lack of community support for visitor industry – industry is continually beat up when trying to work with community
 - Community perceives commercial efforts as adversely affecting their quality of life
 - Region significantly under marketed for overnight/multi-day visitors
 - Need higher quality shops and experiences

- Price of getting to region is very high

Human Resources

- Local workforce constraints (both number and skill sets) – not enough local workers available, but lack of affordable housing is obstacle to hiring from outside region.
- Need opportunities to keep workforce employed during off season so they don't leave.

Technology

- Technology advances slow to come and expensive in region; communities in Southeast still have very slow internet access
- Independent visitor sector is not good at using web/ social media to provide destination information

Infrastructure

- Smaller communities need road infrastructure
- Insufficient funding to develop infrastructure, e.g., trails, huts
- High cost of energy makes it hard to be profitable
- Cost of capital investment in smaller community visitor facilities and infrastructure can be too high for adequate return on investment

Regulatory/Tongass oversight

- Need better conflict resolution between competing forest user groups
- Rising fees create rising prices for visitor experiences
- Excessive regulation is significant barrier to developing new products/experiences that use the forest
- Excessive regulation creates barriers to entry into business
- Jones Act limits business opportunity and forces higher prices
- Forest Service bureaucracy is hard to change to better align with industry needs
 - How can it take *three* years to update management plan Mendenhall Glacier area (and at a time when visitor numbers are decreasing); no changes can be made during this 3-year time period?
- Lack of trust of Forest Service because interaction with industry always results in more fees or regulation
- Wetlands permitting is a challenge
- Roadless rule

- Juneau's Tourism Best Management Practices (TBMP) model needs to be implemented on a state and federal level

Access to Capital

- Insufficient funding for marketing collateral

Participants were asked to identify opportunity areas that seemed most critical or promising, and chose the following eight:

1. Have a place to accomplish one-stop permitting (city, state, federal).
2. Create a UAS visitor industry management/training program or degree with government and private sector internships.
3. Better linking and promotion of multi-community, regional visitor opportunities and packages.
4. Develop a maritime/whale/visitor and education center in Juneau.
5. Need more convenient, abundant, and less expensive access to, and around, the region – by all modes.
6. Provide greater access to the forest for residents, visitors and visitor businesses.
7. Develop hut-to-hut system along and connecting key trails.
8. Have a public agency branch that advocates for and explains the economic benefits of development projects.

By the conclusion of the third meeting, the group developed five initiatives that addressed themes emerging from the Cluster discussions. There was agreement that the region is not effectively marketed to the independent traveler, and that the number of independent travelers could be greatly increased, especially to the smaller communities, if there was an easy one-stop way for the independent visitor to find information to put together a regional itinerary. Sufficient funding for web design and marketing collateral was identified as a key obstacle.

The group felt that the region has many unique local assets that can be better developed into visitor experiences. There was general agreement that one underdeveloped regional opportunity is the many land and water trails that could be upgraded and /or linked to attract the independent "soft" adventure market. Coordination between trail entities for itinerary development, partnership with the Alaska Marine Highway and funding for marketing collateral were identified as priorities. In addition, there is demand for greater guided access to public land than current permit levels allow. The industry felt that capacity control is hindering business expansion. This, along with the desire from the private sector for greater accountability on the part of the Forest Service for user fees, were the focus of the group's initiatives aimed at developing collaborative government assistance in place of current bureaucratic impediment. Finally, workforce development through

education and training emerged as a need within the industry, and partnership opportunities with the University of Alaska, Southeast emerged.

Visitor Products Action Initiatives

Five action initiatives were developed by the Working Group for inclusion with full consensus in the regional strategic plan. Each initiative addresses a specific obstacle or opportunity, based on an assessment of a positive contribution toward growing and promoting the Visitor Products Cluster. Because the timing of working group meetings coincided with the ramp-up period for the summer tourism season, the group could not put more time into developing the action plans with detailed timelines for completion and resource requirements. Each initiative identifies a champion, or co-champions, who has committed to coordinating further work to complete the planning and carry forward the implementation in late summer or early fall.

The initiatives with full consensus by the Cluster Working Group at this time are:

1. Develop Multi-purpose, Multi-community Land and Water Trails and Support Facilities
2. Increase Guided Access to Land
3. Promote Multi-community and regional visitor packages
4. Strengthen Accountability for Tongass Access Fees
5. Integrate Tourism Coursework with UAS Existing Degree Program

Action Initiative 1: Develop Multi-Purpose, Multi-Community Land and Water Trails And Support Facilities

Cluster Working Group:	Visitor Products
Champion:	Linda Kruger, Research Social Scientist, PNW Research Station, US Forest Service, Juneau Forestry Sciences Lab

Initiative Development Team:	<p>Bob Janes, Gastineau Guiding</p> <p>Carol Rushmore, Economic Development Director, City of Wrangell (representing SEATRAILS)</p> <p>Ernestine Hayes, Assistant Professor of English, UAS, School of Arts and Sciences</p> <p>Lorene Palmer, Juneau VCB/ SATC</p> <p>Marti Marshall, Forest Service, Juneau District Ranger</p> <p>Michael Neussl, Deputy Commissioner for Marine Operations, Alaska Department of Transportation and Public Facilities</p> <p>Odin Brudie, Tourism Transportation & Product Development, Alaska Office of Tourism Development</p> <p>Sharon Gaiptman, Consultant</p>
Description & Motivation:	<p>In a 2007 report ISER estimated that nature-based tourism generated over \$250 million per year of direct business revenues in Sitka, Juneau, and Chichagof Island. The ISER report goes on to say that nature based tourism creates an economic ripple effect and Visitors are willing to pay premium prices for higher quality experiences in more pristine environments – something we have in Southeast Alaska. Independent travelers stay longer and have more open itineraries than cruise visitors. SEATrails, a regional non-profit awarded \$120,000 in grants to 10 communities for trail projects, maps, and signs. SEATrails is a coalition of communities across the region. This initiative can explore how to move the SEATrails agenda forward.</p>
Objective:	Examine SEATrails accomplishments and proposals and develop a plan to move a coordinated plan to the next stage.

Action Initiative 1: Develop Multi-Purpose, Multi-Community Land and Water Trails and Support Facilities

ACTION PLAN

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
1. Review SEATrails plans and meet with SEATrails board members	SEATrails Board and interested community members: Amber King, Zieak McFarland, Jim Mitchell, Karen Peterson, Elaine Price, Carol Rushmore, Davey Lubin		
2. Review state and community trail plans. Gather trails organizations, review efforts, identify regional priorities and interest in forming a group to work together.	Sitka Trail Works, Juneau Trail Mix, Ketchikan Outdoor Recreation and Trails Coalition, Alaska State Parks, local Parks and Recreation Departments	Copies of plans and other documents Funding for meeting Lead to organize meeting	
3. Review Tongass National Forest trail plans and efforts.	Tongass NF and ranger district employees	Copies of plans and other documents	
4. Identify and evaluate levels of interest among individuals and SEATrails board and agencies and develop priorities and a plan to move forward	All the individuals and groups listed above	Contact lists	
5. Explore other trail networks and long distance trails for funding, facility and marketing ideas, and users' profiles.	Pacific Crest Trail, Appalachian Trail, Continental Divide Trail, Ice Age Trail, Northwoods Trail, Tour du Mont Blanc and other trails in Europe, New Zealand, etc.		
6. Develop itineraries that enable visitors to visit one or more communities.			
7. Develop partnership with Alaska Marine Highway to provide access/promotion	AMHS, Seatrails, USFS		

Action Initiative 1: Develop Multi-Purpose, Multi-Community Land and Water Trails and Support Facilities

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
Develop Tongass Trails passport/SEAtails passport			
8. Explore developing/linking mountain biking trails			
9. 8. Write material for websites, magazine articles, develop brochures. Integrate culture, history, natural history	Writers		
10. Identify funding needs and possible sources for funding	DOT-PF, Alaska State Parks, USFS, NPS, SEAtails	Scenic Byways grant	

Obstacles and Impediments Likely to Affect Implementation:

STEP:	Help needed:
Time to commit to tasks	Help is needed with each task – volunteers, Job Corps, Vista?
Funding is difficult to obtain	

Funding:

Phase:	Budget:	Funding Source:
A budget needs to be developed		

Outcome/Results: New trails will be developed and new and existing trails will be linked across communities in such a way that visitors can get information enabling them to engage in trail activities going from one community to another.

Brochure identifying trails, websites, info for SEAtails website.

Action Initiative 2: Increase Guided Access to Land

Cluster Working Group:	Visitor Products
Champion:	John McConnochie, Cycle Alaska

Initiative Development Team:	<p>Kelli Dindinger, President, Alaska Travel Adventures, Inc</p> <p>Kirby Day, Director of Shore Operations, Alaska and Pacific Northwest, Princess Cruises</p> <p>Louis Juergens, Alaska Galore Tours</p> <p>Marti Marshall, Forest Service, Juneau District Ranger</p> <p>Molly Kiesel</p> <p>Jon Martin, Tongass Transition Framework Coordinator, Forest Service</p>
Description & Motivation:	
<p>Demand exceeds permitted access levels. Agency permitting processes are limiting economic opportunity in the tourism industry in the Tongass National Forest and other public lands. Lack of permitting flexibility to make quick changes in response to market conditions (more adaptive management and a more micro managed approach). More access to public lands (and to existing areas) to increase capacity.</p>	
Objective:	
<p>Increase guided access to public lands to promote economic opportunity and job growth while maintaining a quality experience for all.</p> <ul style="list-style-type: none"> • Ability to adjust access levels: Permitting flexibility to make short term adjustments in capacity and access to Forest Service and other public lands. • More people see and experience public lands: Add new and existing areas to access. • More fees for the Forest Service. Possibly more hires in the public sector. • Economic enhancement to business and their employees. • Private business hiring more people and/or providing additional work opportunities for current employees: Immediate job creation of approximately 20 to 30 jobs over the course of a 2-3 year period. 	

Action Initiative 2: Increase Guided Access to Land

ACTION PLAN

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
Strengthen the partnership between outfitters/guides and the FS (e.g. through certifications, training, TBMP guidelines for public lands. Goal is quality experience for all.	Tour operators conducting guided product at Glacier and FS mgmt/staff	Review of current plan and continued discussions/dialogue	Ongoing thru out 2011 and 2012
Improve the responsiveness and efficiency of FS permitting	Tour operators conducting guided product at Glacier and FS mgmt/staff	Review of current plan and continued discussions/dialogue	Ongoing thru out 2011 and 2012
Increase access by changing the FS decision making process for issuing/adjusting permits to be more flexible and adaptable to meeting market demand, e.g. NEPA	Tour operators conducting guided product at Glacier and FS mgmt/staff	Review of current plan and catalog request for additional access by operators	Possible initial review July 1, 2011 and ongoing for 2012
Monitor FS user fees to gauge how operators are faring economically	FS and Tour operators	Need to collaborate on any additional short term space made available and resulting job growth, fees paid	Possible July 1, 2011 issuance of new space and monitor benefits thru rest of 2011 season
Investigate comment card from FS to gauge and monitor guests experience	FS and Tour Operators	FS to develop very short comment card to	If new space possible for

Action Initiative 2: Increase Guided Access to Land

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
		gauge overall guest satisfaction at rec area and operators agree to distribute and collect and return to FS	July/Aug 2011, then need comment card by July 1, 2011
After the season ends commit to meet and discuss outcome of the adjustments. This would include operators, District Ranger, permitting officers, etc.	Tour operators, District Ranger, permitting officers, etc.	Fee data from FS and comment card review/summary from FS and Tour Operators	November 2011
If conflicts occur between permittees then they need to resolve amongst themselves (TBMP model)	Tours operators and FS – FS needs to identify any space conflicts	Information from FS on potential space conflict	Ongoing during 2011

Obstacles and Impediments Likely to Affect Implementation:

STEP:	Help needed:
Current rigid and somewhat inflexible permitting process utilized by FS and other agencies which does not allow for quick, short term adjustments in space and access allocations to respond to current market conditions. This may result in jobs not being added and fees not collected.	Frank and open discussions between FS (or other permitting agency) and operators to identify opportunities to flex the process on a trial basis with steps/commitments necessary from both FS and operators.
Public may initially be against adjusting permits to add capacity.	FS and Operators may need to reach out to public to assure them that initial trial of adding capacity on certain days will not negatively affect the experience of tour guests or of those local

Action Initiative 2: Increase Guided Access to Land

STEP:	Help needed:
	residents utilizing the rec area. Will need some positive PR strategy.

Funding:		
Phase:	Budget:	Funding Source:
No initial cost other than time spent by agencies and operators		

Outcome/Results:

Fees revenues are going up – indicates more access to lands.

Review of comment cards to monitor quality visitor experience and insure that no negative results to adding space.

Measure job growth identified by operators – either additional positions and/or additional hours of work available for present staff.

NOTE: true measure of job growth cannot be gauged until operators come forth and identify what days and additional space/capacity/tour departures they desire. Once these are identified, with the assumption of 75% + utilization, these job growth figures could be estimated.

Action Initiative 3: Promote Multi-Community and Regional Visitor Packages

Cluster Working Group:	Visitor Products
Prepared By:	Melanie Lesh, Gustavus Visitor Assoc, Gustavus City Council

Initiative Development Team:	<p>Michael Neussl, Deputy Commissioner for Marine Operations, Alaska Department of Transportation and Public Facilities</p> <p>Linda Kadrlik, Adventures Afloat</p> <p>Linda Kruger, Research Social Scientist, PNW Research Station, US Forest Service, Juneau Forestry Sciences Lab</p> <p>Lorene Palmer, Juneau VCB/ SATC</p> <p>Sharon Gaipman, Consultant</p>
Description & Motivation:	<p>There needs to be a one-stop place for information for the independent tourist to figure out how to design a multi-community itinerary for the region. This initiative will promote more multi-community, regional visitor itineraries through better marketing and promotion of these opportunities.</p> <p>Multi-regional itineraries for the independent travelers need to be better developed and promoted in the region. Definition of independent traveler includes anyone that uses the Marine Highway, including local residents. There is a need to facilitate multiday itineraries – coordinated across communities.</p>
Objective:	<p>This initiative is aimed at how to facilitate the independent tourist to design their own multi-community tour using ferry or small air carrier. Market & promote multi-community packages. Increase visitors to multiple communities.</p>

Action Initiative 3: Promote Multi-Community and Regional Visitor Packages

ACTION PLAN

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
1. Coordinate with AMHS Re: events and multi-stop pass initiative. Challenge (1 year lead time on schedule changes) a) Marketing/questions/answers	Michael Neussl	DOT and PF	Completed
2. Pull together past SE multi-community inventories, itineraries and events with the SE Tourism Council. Recognize all transportation alternatives (jet, air, ferry...) a) Update JEDC Calendar of Events and all known other sources of multi-community calendars	Linda Kruger Michael get list from AMHS	AMHS feedback received	Ongoing
3. Liaison with SE Tourism Council on ongoing branding efforts	Lorene Palmer/Melanie Lesh	Time	Ongoing
4. Investigate developing links to area websites that promote visitor packages. Links to Website/info/community, i.e. Alaska Airlines Free stopover in Juneau	Melanie Lesh	Grid (linked to SETC)	Deadline 4/8/11
5. Involve new Committee member Sharon Gaipman (prior AMHS Marketing Input) for additional background. Private Marketing consultant SE Tourism	Hold interim meetings to discuss long-term approach		Ongoing
6. Find out what independent traveler questions come in to RSVT centers and what info is being put out by	Michael for AMHS	In house (AMHS) response	Completed

Action Initiative 3: Promote Multi-Community and Regional Visitor Packages

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
them?			
7. AMHS Membership on SATC (SATC – all community reps SE, Ferry Rep, Parks Rep.) 8. Legislative lobbying, advocate/market	Already occurring to great extent (most communities and AMHS are currently members)		Completed
9. Look for funding opportunities			Deadline 4/8/11

Obstacles and Impediments Likely to Affect Implementation:

STEP:	Help needed:
Smaller clusters necessary Northern SE, Southern SE	
One year lead on AMHS schedule changes	Staff
There are consolidators but none target independent travelers...	
Expense of travel between communities	
Time commitment to learn, schedule and book – traveler investment	
Commissions on package coordination service – not what we are pushing	
Online connectivity and linkage to facilitate coordination by independent traveler difficult	

Action Initiative 3: Promote Multi-Community and Regional Visitor Packages

Funding:

Phase:	Budget:	Funding Source:
SATC Membership		

Outcome/Results:

SATC – Survey of customers/online survey

Action Initiative 4: Strengthen Accountability for Tongass Access Fees

Cluster Working Group:	Visitor Products
Champion:	Drew Green, Port Manager, Cruise Line Agencies of Alaska

Initiative Development Team:	<p>Bill Hagevig, Juneau Division Manager, HAP Alaska-Yukon</p> <p>Tim McDonnell, Vice President, TEMSCO</p> <p>Jon Martin, Tongass Transition Framework Coordinator, Forest Service</p> <p>John McConnochie, Cycle Alaska</p> <p>Marti Marshall, Forest Service, Juneau District Ranger</p>
Description & Motivation:	<p>Limited or no benefit to the USFS business partner from fees paid (fees have increased dramatically but services/benefits have not). Fees are not clearly used for improvements to the user or region with exception of Mendenhall GVC and Discovery Center.</p>
Objective:	<p>Develop a mechanism for more private sector input to decide where fees are allocated. Work with Forest Service to establish more affordable access and /or local control of fee structure and more accountability. More revenues from users reflected locally on user benefits: Secure a portion of the revenue collected to improve local infrastructure and enterprise support.</p>

Action Initiative 4: Strengthen Accountability for Tongass Access Fees

ACTION PLAN

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
1. Private sector operator presence on the Tongass Fee Board	Local operators, USFS		
2. Investigate how the fee can be lowered			
3. Annual report to outfitter/guides on how fees were spent	USFS		
4. Investigate: Can revenues be used on capital investment and marketing for the Tongass?			

Obstacles and Impediments Likely to Affect Implementation:

STEP: _____ **Help needed:** _____

Funding: _____

Phase: _____ **Budget:** _____ **Funding Source:** _____

Outcome/Results: _____

Action Initiative 5: Integrate Tourism Coursework with UAS Existing Degree Programs

Cluster Working Group:	Visitor Products
Champion:	Kelli Dindinger, President, Alaska Travel Adventures, Inc

Initiative Development Team:	<p>Bill Hagevig, Juneau Division Manager, HAP Alaska-Yukon</p> <p>Erica Simpson, Juneau Manager, Alaska Canopy Adventures</p> <p>Ernestine Hayes, Assistant Professor of English, UAS, School of Arts and Sciences</p> <p>Forest Wagner, Program Director, UAS Outdoor Studies</p> <p>Linda Kruger, Research Social Scientist, PNW Research Station, US Forest Service, Juneau Forestry Sciences Lab</p> <p>Marsha Sousa, Dean, School of Arts and Sciences, University of Alaska, Southeast</p> <p>Odin Brudie, Tourism Transportation & Product Development, Alaska Office of Tourism Development</p> <p>Sean Smith, Glacier Gardens</p>
Description & Motivation:	<p>Lack of local interest in tourism employment opportunities. The initiative will produce a more qualified and larger group of local applicants for entry level as well as management level positions in tourism.</p>
Objective:	<p>Create more employment and educational opportunities for Alaskans. Groom more prepared managers and guides to showcase the Tongass and other Southeast Alaska attractions. Provide an opportunity for UAS to attract and retain four year students.</p>

Action Initiative 5: Integrate Tourism Coursework with UAS Existing Degree Programs

ACTION PLAN

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
Discuss additional program/curriculum opportunities and internship programs with Kathy DiLorenzo and Rick Wolk to gain an understanding of the process that we would need to go through to integrate tourism management courses into existing business degree program.	Kathy DiLorenzo & Rick Wolk Kelli will coordinate this meeting.		May 15th
Write a letter to UAS supporting the 4 year Outdoor Studies Program to the Chancellor John Pugh & Richard Caulfield Also to Regional Forester, CBJ Mayor and Assembly	Forest to draft and JEDC to send final letter		April 15th
Evaluate what classes would we introduce and what degrees would they be applicable for.	Working group members conference call (need to schedule)	Catalogue of classes	May 10th
Create a list of employers who would be able to participate in a collaborative internship program with UAS. Establish internships.	K, Sitka CVB, JCVB, ATIA (Juneau Sitka and Ketchikan). Bill Hagevig will send out the emails.		July 20th
Recruit UAS students from Alaska high schools with a promotion of tourism course emphasis along with promotion of related employment opportunities.	Career advisors Industry employers	Courses implemented Recruiting Program implemented	Feb 2012

Action Initiative 5: Integrate Tourism Coursework with UAS Existing Degree Programs

Describe the specific steps/tasks.	Key People: Who needs to be involved to accomplish step (ID business, agency, or people)	Resources needed to accomplish step	Timeline to accomplish step
		Targeted HS list List of Employers	
Investigate tie-in to Department of Commerce Step-up Guide program.			

Obstacles and Impediments Likely to Affect Implementation:

STEP:

Help needed:

There is a current mandate at UAS to not initiate any new programs, so we will need to start out working with existing programs to create an emphasis in the program or additional courses. We will work toward creating a new program over time.

UAS has some vacant faculty positions which could limit the addition of new classes until those positions can be filled.

Funding:

Phase:

Budget:

Funding Source:

Outcome/Results: We will be successful if we are able to develop a tourism program and a recruiting system that works. The assessment will be ongoing based on the participation level in the classes as well as the retention time of the students. If we see that classes are not filling, then we would have to reevaluate the benefits for the students and make some adjustments.