



YUROK SCENIC BYWAY PROGRAM

ECONOMIC IMPACT STUDY AND TOURISM OPPORTUNITY ASSESSMENT

DECEMBER, 2012

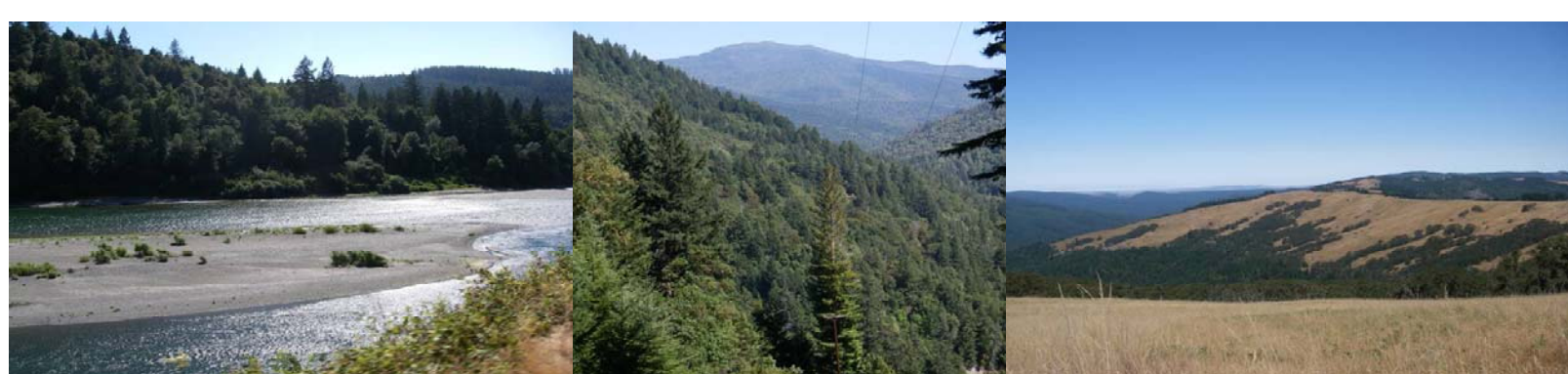


TABLE OF CONTENTS

1.0 Executive Summary	i
1.1 Objectives and Methodology.....	i
1.2 Summary of Findings.....	ii
1.3 Conclusions and Observations.....	iii
1.0 Introduction	1
1.1 Background.....	1
1.2 Methodology.....	1
1.3 Assumptions.....	4
1.4 Study Limitations.....	5
2.0 Situation Analysis	6
2.1 Recreation Trends.....	6
2.2 Culture and Heritage Tourism Trends.....	13
2.3 Existing Visitation.....	19
2.4 Public Input.....	23
2.5 Comparable Tribal Destination Areas with Scenic Byways.....	31
2.6 Summary of Findings and Implications for the YSB.....	39
3.0 Roadway Opportunity Evaluation	41
3.1 Overview.....	41
3.2 YSB Routes.....	41
3.3 Opportunities.....	43
3.4 Constraints.....	43
3.5 Potential Goods and Services Sectors.....	44
4.0 Yurok Scenic Byway Program Investment and Development Scenarios	47
5.0 Yurok Scenic Byway Economic Impacts	49
5.1 Economic Impacts.....	49
6.0 Conclusions and Observations	53

List of Figures

Figure 2.1-1: National Recreation Participation.....	7
Figure 2.1-2: Future Paddle Sport Participation Estimated Change Next Five Years.....	9
Figure 2.1-3: Klamath and Trinity National Forests Recreation Participation by Selected Activities Available via the YSB.....	11
Figure 2.1-4: California Latent Demand for Outdoor Recreation by Those Available via the YSB.....	12
Figure 2.2-1: Primary Reason for Visit by Arizona Travelers.....	14
Figure 2.2-2: Activity Participation by Arizona Travelers.....	15
Figure 2.2-3: Participation in Culture and Heritage Activities by Arizona Travelers.....	16
Figure 2.2-4: Viewing and Learning Activity Participation Klamath and Trinity National Forests.....	18
Figure 2.3-1: Redwood National Park Monthly Distribution of Recreation Visits, 2010-11.....	19

Figure 2.3-2: T.H. Kuchel Visitor Center Monthly Distribution of Visits, 2010-11 20
 Figure 3.2-1: Yurok Scenic Byway Designated Routes 42

List of Tables

Table 2.1-1: National Recreation Participation by Activities Available in YAT 7
 Table 2.1-2: Paddle Sport Frequency of Use by Sub-category 9
 Table 2.2-1: Importance of Culture and Heritage on Decision to Travel in Rural California 17
 Table 2.3-1: Recent Travel Trends in Del Norte County, 2005-2011p 21
 Table 2.3-2: Del Norte County Accommodations Properties 22
 Table 2.4-1: Public Input at Open House – Places to See in the YSB 25
 Table 2.4-2: Public Input at Open House – Things to Do Along the YSB 26
 Table 2.4-3: Public Input at Open House – Services to Provide to YSB Visitors 27
 Table 2.4-4: Public Input at Open House – Things to Sell to YSB Visitors 28
 Table 2.4-5: Public Input at Open House - Suggested Logo Design Elements for the YSB 29
 Table 2.5-1: Tribal Destination Areas with Scenic Roadways - Characteristics and Travel
 Corridor 33
 Table 2.5-2: Tribal Destination Areas with Scenic Roadways - Scenic Byway Promotion
 and Cultural Heritage Attractions 35
 Table 2.5-3: Tribal Destination Areas with Scenic Roadways - Lodging/Casino Operations,
 Recreation, and Arts 37
 Table 5.1-1: National Park Visitor Spending in the Local Area by Segment, 2012 50
 Table 5.1-2: Yurok Scenic Byway Economic Impact Scenarios 52

1.0 EXECUTIVE SUMMARY

The following presents a summary of research findings for the Yurok Scenic Byways Tourism Opportunity Assessment and Economic Impact Study conducted during 2012 for The Yurok Tribe and profiles tourism opportunities and the identified potential economic impacts at the Yurok Scenic Byway (YSB). The report reviews all back ground research pertaining to market trends that may impact YSB development and marketing , a review of comparable regional recreation destinations, and a series of planning, management, and marketing implications for the YSB. The study was conducted by Dean Runyan Associates, Portland Oregon; and Chuck Nozicka Consulting, Tourism and Recreation Planning, Sacramento, California.

1.1 Objectives and Methodology

This report profiles potential tourism and recreation related development opportunities and the associated economic impacts along the YSB. The research was conducted in light of several overall YSB program objectives including but not limited to protection of Tribal culture, places, resources and sovereignty concurrent with expanded opportunities for public recreation tourism development and associated sustainable economic development. As part of our approach we employed a range of research and planning approaches to provide a thorough tourism opportunity and economic impact profile. These approaches included the following.

- Participated in an YSB project scoping session with an array of Tribal planning and tourism project managers and stakeholders and then undertook a regional site tour guided by the YSB Tribal project manager.
- Reviewed all pertinent previously conducted YSB documents and all associated literature pertaining to the Yurok Tribes cultural history regional travel and tourism and the Federal Highway Administration Scenic Byway Program.
- Conducted a tourist oriented information search via on site and internet sources from the perspective of potential visitor to identify current information sources.
- Profiled existing conditions including a thorough review of market demand trends that indicated the types of activities that would most likely attract visitors to the YSB region.
- Participated with the Yurok project managers to provide an opportunity for public input from Tribal members and regional stakeholders to provide input and comment on the YSB program; these public input efforts consisted of two open house workshops.
- Profiled comparable Indian scenic byway projects by contacting and reviewed scenic byways programs throughout the western United States. This profile provides information sources contacts and examples that may inform YSB program managers.
- Conducted and economic impact assessment that estimated potential economic impacts of the YSB including overall visitation and employment for a range of YSB development scenarios.

1.2 Summary of Findings

The following outlines the findings, research observations, and implications for planning, development, and management as presented in this report. These include market demand trends for activities available within the YSB region, profiles of comparable Indian scenic byway areas, and potential YSB economic impacts.

Recreation Trends

Overall recreation participation for an array of activities that are accessible via the YSB indicates relative stability in outdoor recreation use. These include activities that have remained consistent or show slightly increasing participation and which are available within the YSB region.

Given that the YSB provides access to the Klamath River's water recreation resources, trends in non-motorized boating below, non-motorized boating has been experiencing tremendous growth over the last decade with estimates from various sources showing an influx of new boaters and increasingly frequent activity from those already participating in the sport.

The raw percentage of visitors to public lands on the Klamath and Trinity National Forests and who participate in activities available via the YSB is significant and provides opportunities to attract these visitors to the YSB.

State wide latent demand for recreation activities – those activities which participants would do more often if available – include several featured in the YSB region.

Cultural Heritage Tourism Trends

National trends indicate strong interest in cultural and heritage activities on the part of travelers in the United States.

According to data provided by the California Travel and Tourism Commission, cultural and heritage activities and facilities have a significant impact on the decision to travel within rural California.

United States Forest Service data for the Klamath and Trinity National Forests indicates a relatively high level of interest in viewing and learning experiences that are available in the YSB region.

Existing Visitation

Redwood National and State Parks serves as the primary visitor attraction to Northern California's Pacific Coast attracting approximately 415,000 visitors each year.

The Trees of Mystery private sector attraction draws approximately 200,000 visitors each year.

Visitor spending in Del Norte County has grown by about 2 percent per year since 2005 for an annual total of \$108 million.

The YSB region has an existing range of accommodations facilities for overnight visitors.

Open House Events

Under the places-to-see category several options were mentioned by open house attendees with these primarily including an array of natural features including Redwood tree groves, waterfalls and river sites, and wildlife viewing opportunities.

The suggested things-to-do reflect the outdoor recreation amenities available within the YSB. However, many of the suggestions focus on not yet available opportunities including a YSB Visitor Center and interpretive activities.

Most prominently among visitor services was a Yurok Heritage Center along with interpretive guided tours; among the suggested goods to sell category, attendees' comments focused on food and native crafts.

For purposes of marketing the YSB, attendees suggested YSB use logo motifs such as the river, salmon, basketry and redwood canoes.

Comparable Scenic Byways

Selected areas are located in rural areas that function as a significant visitor destination within the state or region and are often associated with and key attraction such as a national park or noteworthy scenic landscape.

Scenic byways are often the primary means by which visitors travel to and through the area.

Tribal revenues are, in large part, generated through the operation of hotels, motels, restaurants, casinos, and other visitor-related services; most also operate a museum and/or cultural heritage center with a retail venue.

Tribes living in these areas host many Pow Wows, community celebrations, and public events throughout the year, though most are oriented to the summer season.

1.3 Conclusions and Observations

The primary observations and implications for YSB development are as follows.

Market demand conditions are positive. Demand for outdoor recreation and cultural and heritage destinations appears stable, even with the continuing economic challenges of 2012.

Challenges remain. The twin challenges of a remote location and a short visitor season will continue to provide challenges for developing a sustainable destination.

A fully integrated approach. Integrating all elements of the Yurok tourism development effort under the banner of the YSB may provide the best opportunity to develop the Yurok Ancestral

Territory as a prosperous visitor destination. Importantly, this integrated approach will require a long term sustainable effort.

Long-term sustainable effort. It is critical to note that the overall integration of marketing, facility and product development, and management will require a long term sustainable effort. Building a recognizable brand and developing an effective market position within the highly competitive destination travel market requires time an ongoing commitment to a tourism development program including both funding and staffing.

Substantial economic impacts. Given the rural nature of the YAT area and specifically the YSB region, the potential economic impacts are considerable. An additional 29,000 visitor party days would generate \$7.1 million in travel generated expenditures with an associated 80 jobs and \$1.3 million in travel generated earnings. This represents a 25 percent increase in visitor spending above the current level now generated by visitors to Redwood National Park.

1.0 INTRODUCTION

The Tourism Opportunity Assessment and Economic Impact Study is a key tool for implementation of the Yurok Scenic Byway Program. It is part of a much larger, comprehensive vision to recognize the traditional transportation corridors of the Yurok Tribe, educate visitors about their significance to the Yurok people and the region, attract visitors, and provide development opportunities for the Yurok Tribe.

1.1 Background

The Yurok Tribe began work on realizing the vision for a Yurok Scenic Byway (YSB) in 2009. Following a comprehensive planning effort that included an inventory of the potential corridors, identification of intrinsic values, public input from Tribal members, and coordination with other regional stakeholders, the Yurok Scenic Byway was officially designated through action of the Yurok Tribal Council in April, 2011.

This is the first Tribal scenic byway program to be established in the State of California, and one of only several that have been established nationally. The establishment and structure of the YSB Program is contained in the *YSB Policies and Procedures* document with the long range vision for implementation described in the *YSB Strategic Plan*. The YSB currently includes several major routes through the Yurok Ancestral Territory (YAT), with the potential to add other routes in the future, including the Klamath River, as designated corridors.

The *YSB Strategic Plan* identifies eight major goals for the YSB. These goals paint a comprehensive vision for the YSB that includes protection of Tribal culture, places, resources, and sovereignty together with sustainable economic development, collaboration with stakeholders, and expanded opportunities for public recreation and education. All subsequent implementing actions for the YSB are to be consistent with and guided by these goals. Development of the Environmental and Cultural Resources Interpretive Plan and the Tourism Assessment and Economic Impact report is identified by the YSB Strategic Plan as a high priority initiative essential to realizing this vision.

This report takes the next step in the designation process by specifically assessing potential tourism and recreation related development opportunities along the YSB. In addition, we review the associated economic impacts that might accrue to the YSB region as a result of designation and development of associated visitor serving facilities.

1.2 Methodology

Assessing the federally recognized and Yurok Tribal Council designated YSB required that we apply a range of range of research and assessment approaches. These research and analysis approaches were used to provide the most accurate estimates of recreation participation and

to identify potential economic impact. The approaches included an initial scoping session with Yurok program managers and a regional site tour; background document review; research into existing conditions for travel within the YSB region; an online visitor perspective search for YSB area information; gathering the input from those in the community; and comparable research. We utilize these gathered insights and data to arrive at a thorough analysis and economic forecast.

Project scoping session and site tour. We attended a project initiation session attended by the YSB Coordinator, Yurok business owners, and other Yurok Tribal staff involved in planning for associated development efforts. As part of this meeting we received significant input and insight into issues pertaining to the YSB project. In addition, the consulting team was guided on a tour along the proposed YSB routes. Accordingly we were informed of several potential projects that may be developed as part of the overall YSB program including:

- Hotel and restaurant facility, potential additional camping, and other Klamath River lodging opportunities.
- YSB Center and Interpretive facility along Highway 101 and a working Yurok village site located on the Klamath River corridor.
- Guided Klamath River and trail experiences.
- A comprehensive plan for transportation along the YSB corridor including the Klamath River.

Background documents and literature review. We reviewed all previously conducted documents with specific attention to the *YSB Policies and Procedures* document and the *YSB Strategic Plan*. These documents provided the initial review of the YSB and were used to inform the research and analysis work conducted in this report. In addition, the documents were utilized as background information for the YSB Interpretive Plan which was conducted concurrent with this document. Additionally we reviewed a range of Federal Highway Administration Scenic Byway Program documents including but not limited to The Scenic Byway Resource Center Economic Impact Tool and other associated guides for marketing and product development.

Tourist Oriented Information Search. As part of our initial review of the YSB area and site tour, we conducted an online search for recreation and heritage activities available within the area. We approached the online information as if we were travelers seeking destinations and activities. In addition we reviewed any associated posts on traveler review site such as *tripadvisor.com*.

Existing Conditions. We reviewed trend information that indicates the types of activities that are currently available to visitors in the YSB region and the rates of participation in those activities. In addition, we reviewed and presented other associated visitor data with specific attention to annual visitation at Redwood National Park, a primary attractor to the region and an indicator of season travel patterns. We also gathered information from private visitor

attractions to further ascertain the magnitude of current visitation. Finally, we reviewed the commercial travel infrastructure with specific attention to lodging properties that serve as an indicator of potential overnight stays which is the largest economic impact for a region.

Public Input. We participated with the Yurok project managers to provide an opportunity for public education and comment on the YSB. In order to provide the greatest opportunity for public participation we hosted two public workshops with one Open House event held in the town of Klamath and one held in Weitchpec.

Comparable Indian Scenic Byway projects. We contacted and reviewed scenic byways programs in Indian country with special focus on those located in the western United States. Based on this research, this report provides a profile of programs including, but not limited to, Tribes participating National Scenic Byway programs; type of routes that service the byway; designation by federal and/or state programs; cultural and heritage interpretive facilities; availability of guiding services; Tribal member produced art and crafts products; and lodging and associated amenities.

Comparable Indian scenic byway information was gathered from three broadly defined regions, with a diversity of Tribal nations, including: Oregon, Washington and Idaho; Southwest (Nevada, Arizona, and Oklahoma); and Upper Missouri River: North Dakota and South Dakota.

Tribal Nations include the following:

Oregon, Washington, and Idaho

- Confederated Tribes of the Umatilla Indian Reservation
- Confederated Tribes of the Warm Springs Reservation
- Confederated Tribes of Siletz Indians
- Quinault Indian Nation
- Makah Indian Nation
- Muckleshoot Indian Tribe
- Squaxin Island Tribe
- Confederated Tribes & Bands of Yakama Nation
- Confederated Tribes of the Colville Reservation
- Nez Perce Tribe

Southwest

- Pyramid Lake Paiute
- Hopi Tribe
- The Navajo Nation
- The Cherokee Nation

Upper Missouri River: North Dakota & South Dakota

- Standing Rock Sioux Tribe
- Lower Brule Sioux Tribe
- Crow Creek Sioux Tribe
- Cheyenne River Sioux
- Sisseton Wahpeton Oyate Tribe

1.3 Assumptions

As part of our analysis we assume a variety of conditions for a successful YSB program. In particular, after reviewing the array of Indian National Scenic Byway programs, we noted that there is a wide range of sophistication with respect to byway development and marketing. Our meeting with Yurok project managers indicated that the YSB will be developed as a de facto tourism development program for the Yurok Tribe, and will be marketed at a level similar to or exceeding the best examples across the United States. Accordingly, our assumptions in this analysis include the following:

Sustainable operations. We assume that all elements of YSB development will be managed to ensure long term sustainability. This is particularly important since positioning a newly designated YSB requires a patient approach to developing the YSB brand and the associated recognition by the traveling public, regional partners, and internal decision makers.

Facility development. We assume for purposes of our analysis that an array of visitor attracting and serving facilities will be developed such as, but not limited to, a YSB cultural interpretive facility, a visitor information center, and information kiosks. In addition, we assume that any developed visitor serving project will be designed and constructed at the highest standards and will, in cases where appropriate, integrate cultural motifs that signal to the visitor the cultural significance of place.

Marketing program. In order to attract and sustain the estimated visitor business we assume that the YSB will develop and implement an integrated marketing program directed by a formal YSB Marketing Plan and media program. This program would be actively involved in marketing the YSB and importantly, be professionally developed and managed.

Marketing activities may include but would not be limited to: Web presence (Web site, and social media sites); traditional collateral material development including brochures and maps; advertising programs; attending travel promotion trade shows; and coordinated work with other regional Destination Marketing Organizations (DMOs) as well as the California Travel and Tourism Commission. Finally, we assume that a YSB signage system and professionally designed logo and theme development will be initiated.

Partnerships. To ensure YSB marketing program success we assume that all critical strategic partnerships will be developed and maintained. These may include but are not limited to the National Park Service staff at Redwood National Parks, California State Parks, regional

Destination Marketing Organizations, and California Tourism. In addition we assume membership and participation with national level Indian tourism organization such as the American Indian Alaska Native Tourism Association (AIANTA).

Internal hospitality training programming. In order to sustain a long term and growth oriented tourism program, hospitality training with particular concentration on front line visitor serving personnel is assumed. We further assume that a Yurok tourism program may provide hospitality training for employees of the Tribe but also make this training available to private enterprises operating within the YSB.

Economic growth. Since this project is being conducted during a significant economic downturn we assume that these conditions will not exist in perpetuity, nor will any additional significant regional economic dislocations occur. In other words, some level of positive economic growth is assumed and no additional shocks to the travel industry or to the local economy will occur.

1.4 Study Limitations

This study is based on a range of research techniques and projection assumptions and as such certain limitations to a precise economic impact estimate exist. Limitations inherent in the research include the following:

Visitor profile data. There is no comprehensive set of primary data on visitors to the YSB region. Accordingly we use National Parks, U.S. Forest Service, and statewide survey information. These data to a substantial extent provide a baseline for our work.

YSB related projects. While we are aware of the intent to develop several visitor servicing facilities we do not have specific feasibility studies or planning data to directly apply to our projections. However, we do apply the range of proposed facilities to the analysis.

Market position. At present the YSB region and associated activities are relatively unknown to the traveling public. Since an integrated marketing program does not exist, we make our projections with the understanding that the region and its amenities will be marketed as a comprehensive whole; however we cannot with precision determine the effect YSB marketing will have on future visitation.

Seasonality. Available visitation data for the YSB region indicate significant seasonality with peak visitation during the summer months – existing seasonal visitation to Redwood National Park. Our assessment asserts no change.

2.0 SITUATION ANALYSIS

This chapter presents a range of research findings that provide a basis for identifying potential tourism opportunities in the YSB. The research includes a basic review of applicable visitor participation trends for outdoor recreation and cultural and heritage tourism. In addition we profile the scope and magnitude of current visitation to the YSB region.

2.1 Recreation Trends

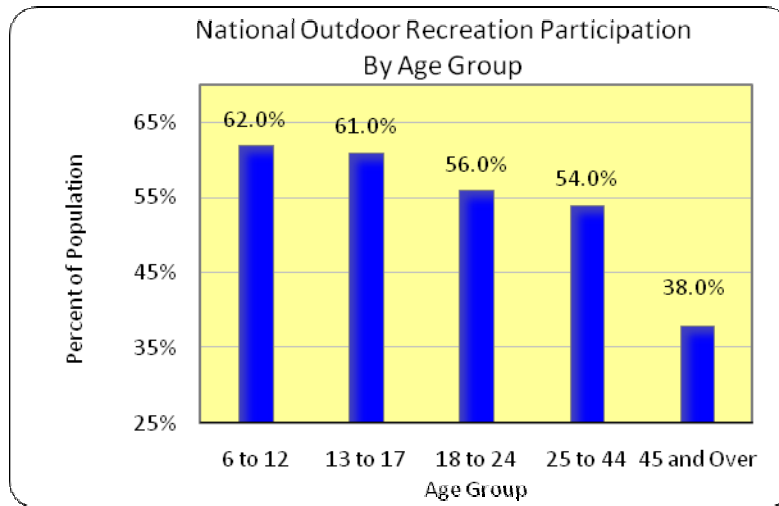
This section reviews the most recent recreation research to provide a profile of recreation activity trends that may be most applicable to YSB recreation use, planning, management, and marketing. In this section we present overall recreation data including applicable national, state, and regional trends.

National Trends

National trends can have an indirect impact on YSB, because many of these trends affect recreation use throughout the country including potential YSB visitor populations. Specifically, understanding these trends can allow planners and marketers of the YSB to understand the potential for visitation to Yurok lands and associated economic impacts, as well as to ensure that all YSB efforts are conducted with an efficient targeted development approach. Fortunately, an array of recreation industry organizations closely track overall national recreation use for purposes of sales and product and service development and these data can be easily accessible sources of information for YSB development. Accordingly, we have provided an example of these findings including the following recent overarching observations by the Outdoor Industries Association (OIA), Outdoor Foundation (2011).

- *Nearly 50% of Americans six and older participated in outdoor recreation in 2010.* These rates are similar to those in 2009 showing that despite the economic contraction, Americans continue to recreate outdoors.
- *Outdoor enthusiasts use technology to connect to the outdoors.* Over 60 percent of those in the 18 to 44 age groups use technology, including the Internet and mobile technology, to search for recreation information.
- *Participation in outdoor activities was significantly higher among Caucasians than any other ethnicity.* However, participation rates among youth in other ethnic groups are increasing.
- *Outdoor recreation use decreases with age.* See Table 2.5-1.

Figure 2.1-1: National Recreation Participation



Source: Outdoor Industries Association, Outdoor Foundation, 2011

Overall recreation participation for an array of activities that are accessible via the YSB indicates relative stability in outdoor recreation use. Activities that have remained consistent or show slightly increasing participation and which are associated with the YSB include trail use of all types including hiking and mountain biking. However, several activities are either increasing somewhat or are new outdoor recreation options. See Table 2.1-1. Of special note for the YSB, activities with some growth include two non-motorized boating sports – kayaking and stand-up paddling.

Table 2.1-1: National Recreation Participation by Activities Available in YAT

	2006	2007	2008	2009	2010
Camping (car)	15.7%	14.4%	15.2%	15.6%	14.9%
Fishing	15.7%	15.8%	14.4%	14.5%	13.7%
Hiking	10.9%	10.8%	11.6%	11.6%	11.5%
Wildlife viewing	7.4%	8.3%	8.6%	7.6%	7.4%
Hunting	5.5%	5.1%	5.0%	5.4%	4.9%
Bird watching	4.0%	4.9%	5.2%	4.7%	4.7%
Canoeing	3.3%	3.5%	3.6%	3.6%	3.7%
Mountain biking	2.5%	2.5%	2.7%	2.5%	2.5%
Kayaking	1.5%	1.8%	2.2%	2.2%	2.3%
Trail running	1.7%	1.5%	1.7%	1.7%	1.8%
Climbing (sport)	1.7%	1.6%	1.7%	1.5%	1.7%
Scuba diving	1.1%	1.1%	1.2%	1.0%	1.1%
Stand-up paddling	n/a	n/a	n/a	n/a	0.4%

Source: Outdoor Industries Association, Outdoor Foundation, 2011

The Active Outdoor Recreation Market

Among activities available to YSB visitors is a category known as *Active Outdoor Recreation* (Outdoor Industry Foundation, 2006). This robust outdoor recreation market comprises those participating in the following recreation categories:

- Paddling (kayak, rafting, canoeing)
- Wildlife viewing (bird watching, other wildlife watching)
- Trail use (trail running, day hiking, backpacking, rock climbing)
- Camping (RV at campsite, tent, rustic lodging)
- Fishing (recreation fly and non-fly)
- Hunting (shotgun, rifle, bow)
- Bicycling (paved and off road)

Non-Motorized Boating Trends

Given that the YSB provides access to the Klamath River's water recreation resources, trends in non-motorized boating are useful indicators for proposed development strategies. As described below, non-motorized boating has been experiencing tremendous growth over the last decade with estimates from various sources showing an influx of new boaters and increasingly frequent activity from those already participating in the sport.

Paddle sports have been a growing boating activity for several years, with an estimated 48-52 million Americans participating in paddle sports and their various forms annually (*National Survey on Recreation and the Environment, US Forest Service 2004*). While canoeing and rafting, long-time mainstays of paddle sports, have been attracting millions of participants for some time, national information sources indicate that kayaking has experienced the most robust growth in recent years.

According to the American Canoe Association, participation in kayaking grew dramatically between 2000 and 2004 or from 2 million to 10 million participants during the five year timeframe (*American Canoe Association; Proceedings: The ACA and You 2008*). More recent research from the Outdoor Industry Association (OIA, *Special Report on Paddle Sports, 2009*) indicated overall paddle sport activity ranges from 17.8 million to 23 million participants nationally. Regardless of the source estimate, the numbers are substantial for the paddle sport category.

Just as important as raw participation by percent of population is the propensity to actually use the water craft, i.e., to what extent do these recreation users visit recreation resources with any frequency. As it turns out, the data show that paddle sport users participate in their chosen activity with remarkable frequency. See Table 2.1-2.

Table 2.1-2: Paddle Sport Frequency of Use by Sub-category

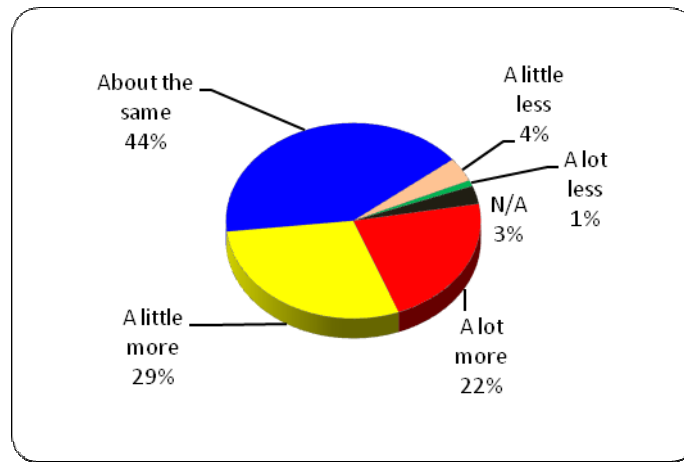
	1 time	2-3 times	4-5 times	6-11 times	12-23 times	24+ times	Annual Average
Kayaking	21%	26%	18%	16%	11%	9%	10 Days
Rafting	43%	31%	9%	9%	3%	5%	6 Days
Canoeing	22%	30%	21%	13%	6%	7%	7 Days

Source: Outdoor Industry Association, Special Report on Paddlesports (2009)

Paddle Sports Future Demand

Recent boating activity data are available from the California Department of Boating and Waterways. The data are revealing as indicators of activity demand for boating on the Klamath River, which include the growing popularity of paddle sports. As shown in Figure 2.1-2, the percent of boaters who anticipate similar or increased rates of activity within the next 5 years constitutes the majority of users, with nearly 50 percent saying they will increase their paddle sport activity. If these indicators hold true for the YSB, boating demand and associated shoreline access needs will increase.

Figure 2.1-2: Future Paddle Sport Participation Estimated Change Next Five Years



Source: California Department of Boating and Waterways (2009)

These trends indicate two primary impacts for managers of the YSB. First, the number of paddlers looking for non-motorized water recreation has been growing at a consistent and robust rate. There are more paddlers, but no new paddling destinations are being added, so pressure on boating destinations will probably grow thus providing an opportunity for the YSB.

Of course, to the extent that private and public managers provide increased access and/or use concessionaires to provide paddle sport facilities, new supply is added. However, in general, the supply of water recreation resources is static. This growth rate then provides a potentially ample user audience for resources like the Klamath River. Secondly, for those paddlers that visit non-motorized boating facilities, the likelihood of multiple return visits is high. For the

portion of the YSB that provides boating access, paddle sports will continue to demonstrate consistent and probably a growing demand.

Regional Trends – Klamath and Trinity National Forests

To provide a regional perspective, data is available from the U. S. Forest Service via the *National Survey on Recreation and the Environment* (NSRE). As shown in Figure 2.1-3, the raw percentage of visitors to public lands who participate in activities available via the YSB is significant. Furthermore, while activities such as paddle sports show growth, the largest proportion of recreation users arrive at the National Forests to engage in leisure activities, such as driving for pleasure, viewing the scenery, sightseeing, and hiking.

In addition, a high percentage of public land recreationists visit a beach, locations to swim, and hiking trails – all activities featured along the YSB. A second tier of activities includes swimming, paddle sports, fishing, motor boating, and mountain biking. Clearly, those recreating in the region choose a wide array of activities that they see as available on public lands. While the data is specific to the region’s National Forests we can assume that those visiting the YSB may recreate with similar interests. See Figure 2.1-3.

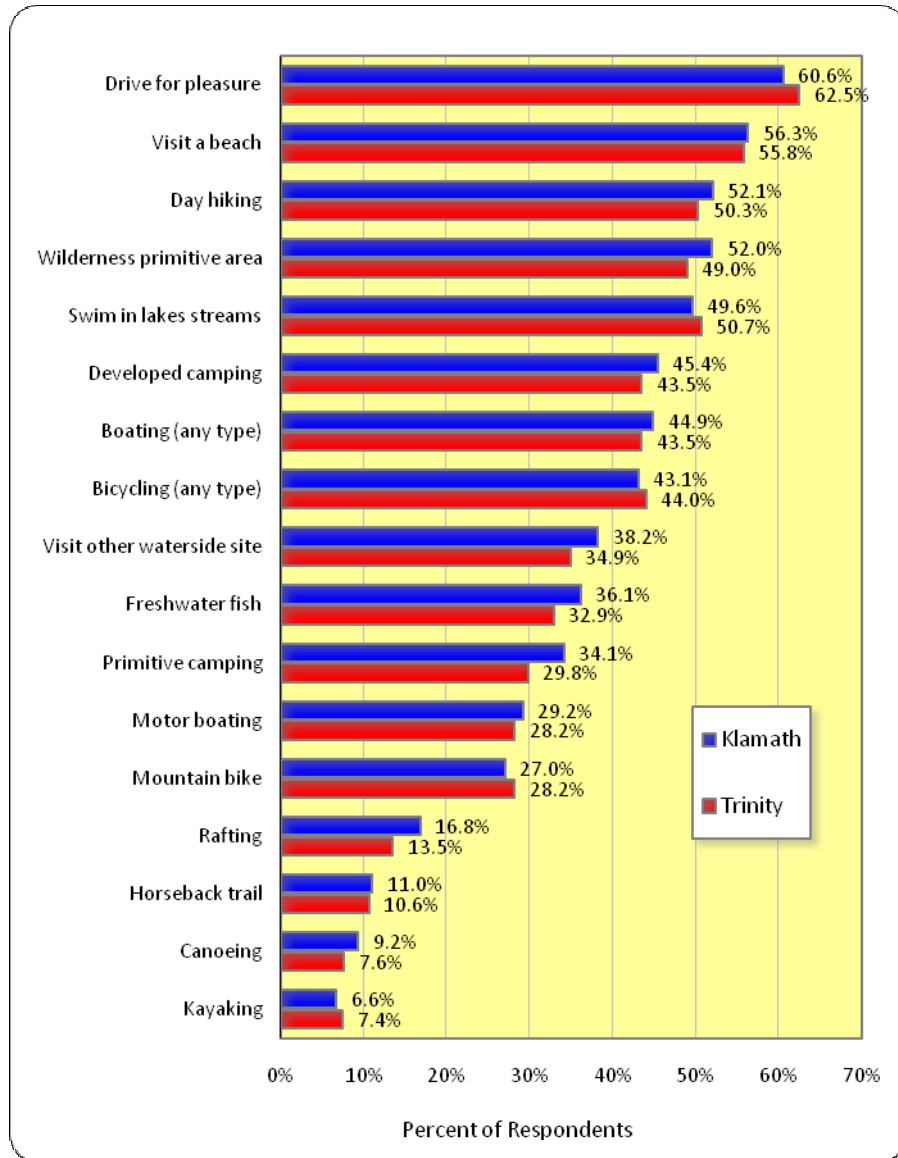
Since the data for the parks as well as the Klamath and Trinity National Forests represents a profile of recreation participation occurring closest to the YSB region, these findings indicate that there is an opportunity for the YSB to immediately increase visitation by providing and promoting access to these same activities on Yurok lands. Of course most easily implemented would be an associated program that can attract these existing recreation users to the YSB region by developing a YSB Marketing Plan and then participating in a range of marketing and information activities such as web site and advertising development. These marketing efforts could also be enhanced by linking information to and cooperating with these public outdoor resource managers.

Latent Demand

Another useful metric provided by recreation researchers is known as *latent demand*. In other words, what percent of the general population would engage in these activities more often if they could and if facilities were available? This is difficult metric to identify because it involves substantial primary research and large numbers of respondents. In addition, the metric relies on respondent estimates of their yet-to-be-determined recreation activity. California State Parks conducts a regular survey that identifies the latent demand for a range of activities.

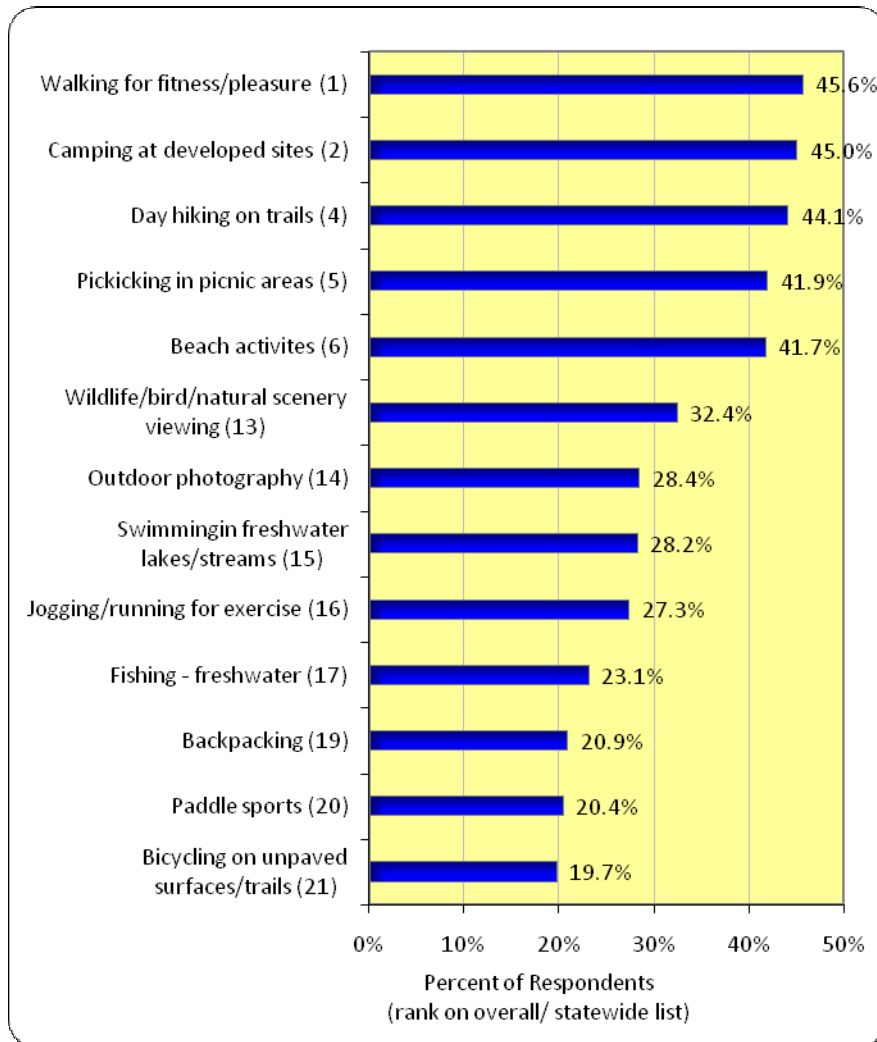
Figure 2.1-4 shows the latent demand for those activities that are available along the YSB. As a measure of potential demand from YSB visitors, the data show that the majority of the California public would participate more in walking for pleasure, camping, hiking, picnicking, beach activities, and scenic viewing. Note that even at the low end of this list, one-out-of-five responded that they would participate in the surveyed activities, including those who would increase their participation in paddle sports and mountain biking.

Figure 2.1-3: Klamath and Trinity National Forests Recreation Participation by Selected Activities Available via the YSB



Source: National Survey on Recreation and the Environment, Recreation and Tourism Statistic Update, 2006

Figure 2.1-4: California Latent Demand for Outdoor Recreation by Those Available via the YSB



Source: California State Parks, Survey on Public Opinions and Attitudes on Outdoor Recreation in California, 2009

Implications for the YSB

All reviewed outdoor recreation trends for the types of activities available in the YSB region indicate that market demand will provide sustainable to strong growth for the foreseeable future. Moreover, California demand for these activities indicates a shortage of supply. Finally, existing data regarding current use within the wider region indicate an active recreation population already accessing recreation areas in or near the YSB region. These finding indicate that the YSB can be positioned as a featured Northern California recreation destination and that developing recreation amenities and services, and marketing the amenities that can serve these markets may generate increased visitation for the Tribe’s tourism sector.

2.2 Culture and Heritage Tourism Trends

Since one of the primary elements of the YSB is to interpret the Yurok Tribe's cultural and heritage setting, this section presents a variety of statistics and measures to describe the current trends and overall magnitude of cultural and heritage travel.

National Trends

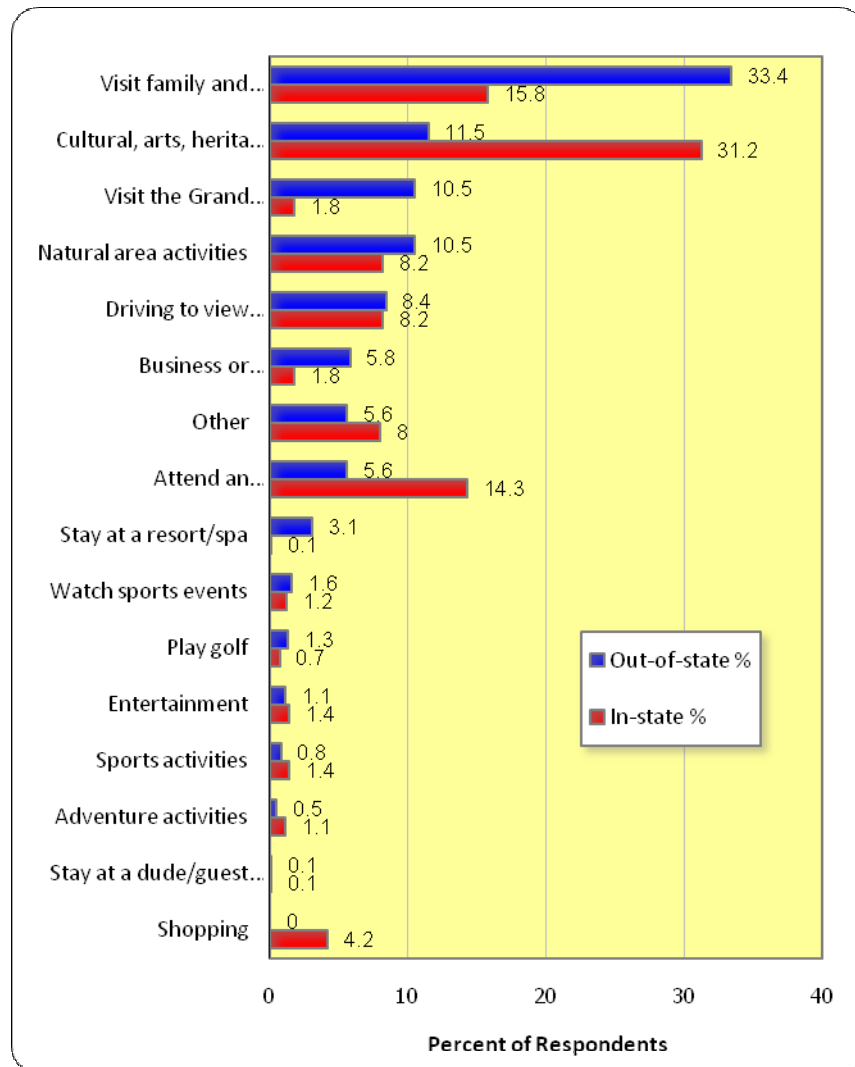
According to data gathered by the U.S. Department of Commerce, Office of Travel and Tourism Industries, national trends indicate strong interest in cultural and heritage activities on the part of travelers in the United States. Accordingly, the following research findings (*U.S. Cultural and Heritage Tourism Marketing Council, 2009*) provide insights into what may occur with YSB visitors.

- *The majority of travelers participate in cultural and heritage activities.* Among leisure travelers, 78% participate in cultural and heritage activities during their trip. This translates to a total of 118.3 million adults conducting cultural and heritage travel each year.
- *Cultural and heritage travelers spend more.* Cultural and heritage travelers spend an average of \$994 per trip compared to \$611 dollars spent per trip by other leisure travelers.
- *Those interested in culture and heritage travel more frequently.* These travelers report an average of 5.01 trips within the past 12 months compared to non-cultural travelers who report an average of 3.98 trips.
- *They travel farther.* More than half of cultural and heritage travelers reported leisure trips of 500 miles or more from home.
- *Attracted to culinary activities.* The study reported that cultural and heritage travelers are more likely to seek out culinary experiences including attending food and wine festivals, visiting farmers markets, and enjoying unique dining experiences.
- *Participate in a range of cultural and heritage activities.* These travelers participate in a range of activities including: visiting historic sites (66%), attending historical re-enactments (64%), attending dance performances (44%), visiting national and state parks (41%), and shopping in museum stores (32%).
- *Are drawn to places that have retained their historic character.* The bulk of cultural and heritage travelers (65%), say they seek destinations where buildings and surrounding retain or express an historic character.

Cultural Heritage Travel in the Western U.S.

Arizona is among the western states that have the best developed destinations related to the Tribes. As a result, the Arizona Humanities Council has generated some of the best heritage specific travel information available during a study conducted in 2005 and 2006. Since Indian destinations are particularly important in Arizona these findings lend insight into potential for the YSB. According to the findings in Figure 2.2-1, culture, the arts, and heritage are the primary reasons for in-state visitors to travel and the second most important reason for out-of-state visitors.

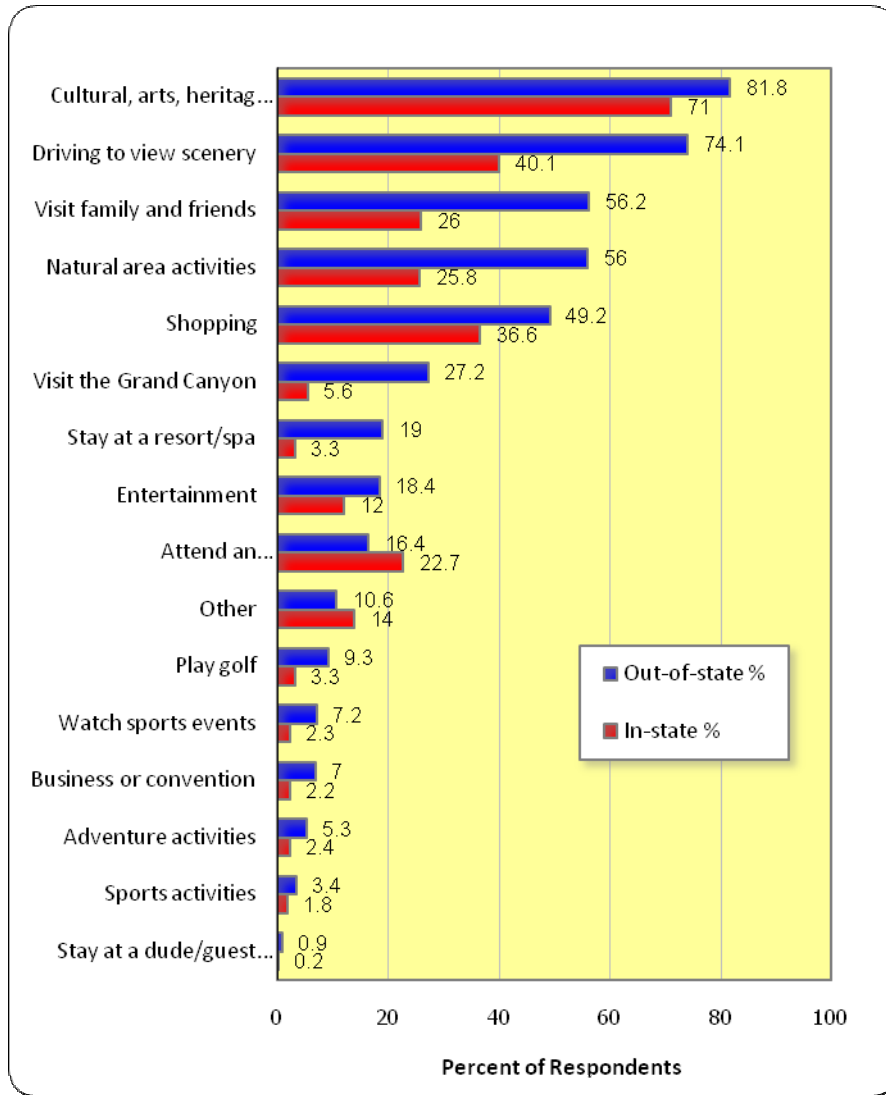
Figure 2.2-1: Primary Reason for Visit by Arizona Travelers



Source: Arizona Humanities Council (2006)

Among these same travelers, culture and heritage is the primary activity among in-state visitors followed by scenic drives. Out-of state visitors also mentioned these same activities with scenic drives mentioned by a slightly higher percentage. See Figure 2.2-2.

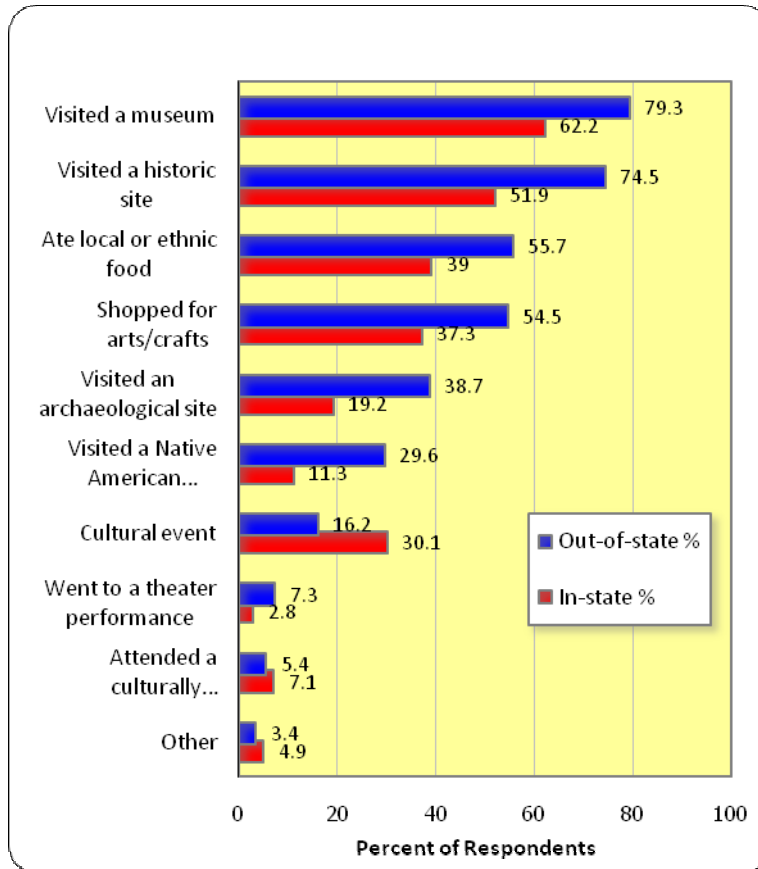
Figure 2.2-2: Activity Participation by Arizona Travelers



Source: Arizona Humanities Council (2006)

Finally, out-of-state visitors tended to participate in cultural and heritage activities at higher levels compared to in-state travelers. See Figure 2.2-3. However, note that developed heritage facilities including a museum and historic sites are those amenities those most appealing to both in-state and out-of-state visitors. In addition, among the goods and services purchased local or ethnic food and arts and crafts attracted the most attention.

Figure 2.2-3: Participation in Culture and Heritage Activities by Arizona Travelers



Source: Arizona Humanities Council (2006)

Cultural Heritage Travel in California

According to data provided by the California Travel and Tourism Commission, cultural and heritage activities and facilities have a significant impact on the decision to travel within rural California. As indicated in Table 2.2-1, surveyed travelers indicated the relative importance of an array of activities and the impact of the availability of these activities on the decision to travel, with numbers ranked in order of importance. With the exception of family friendly activities, culture and historical interests rank the highest for identified culture and heritage travelers. Among those not identified as cultural heritage travelers, historic interests remain the second most important influencer with cultural activities less important.

Table 2.2-1: Importance of Culture and Heritage on Decision to Travel in Rural California

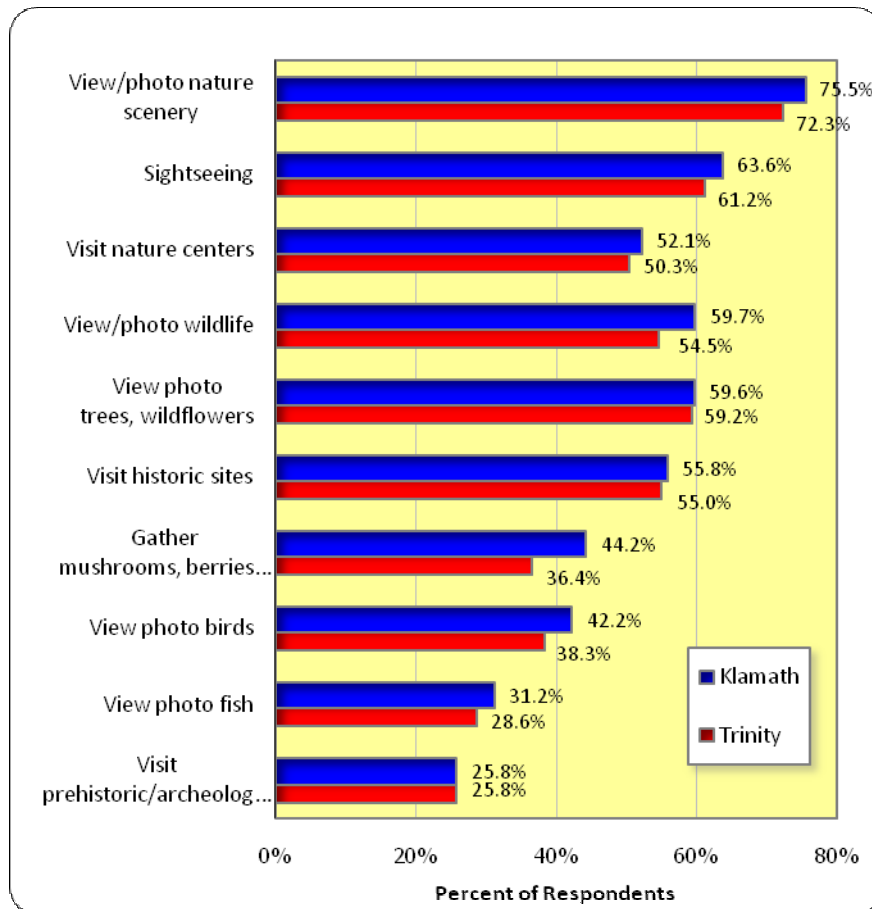
	Cultural Heritage	Rank	Non Cultural/Heritage	Rank
Family friendly activities	4.20	1	3.28	1
Cultural interests	4.20	1	4.86	5
Historical interests	4.43	3	4.49	2
Outdoor recreation	4.34	4	4.71	4
Adventure travel	4.57	5	4.63	3
Food and wine	5.15	6	5.11	6
Environmental based	5.76	7	6.1	9
Experiential and learning	5.84	8	5.84	7
Camping	6.09	9	5.98	8

Source: California Travel and Tourism Commission (2009)

Finally, in the YSB region we can gauge the contribution of cultural and heritage opportunities on visitor activities by reviewing the National Forest data on viewing and learning activities. See Figure 2.2-4. As shown, a majority of those visiting the region’s National Forest view scenery, wildlife, and trees. These attributes are of course also featured characteristics of the YSB. In addition, there is a relatively high level of participation in visiting nature centers and historic sites; while not specifically proposed in the YSB, nature centers do indicate an interest in built facilities such as the discussed Yurok Visitor and Cultural Center and the Yurok Village project.

A second tier of activities includes gathering mushrooms and berries, viewing birds and fish, and visiting archeological sites. While these data indicate a relatively high level of interest in viewing and learning experiences in the YSB region, these are responses focused on the National Forest and as a result are indirect indicators of potential interest.

Figure 2.2-4: Viewing and Learning Activity Participation Klamath and Trinity National Forests



Source: National Survey on Recreation and the Environment, Recreation and Tourism Statistic Update, 2006

Implications for the YSB

Our review of applicable cultural and heritage tourism trends and activities indicates that, similar to outdoor recreation markets, the national and regional trends put the amenities and nature of the YSB squarely in the path of robust cultural and heritage market demand. In fact, since we found no other California tribes that have focused on developing their region as a cultural and heritage resource, the Yurok Tribe has an opportunity to position the YSB as a premier California Indian heritage destination. Fortunately the work associated with this document, the YSB Interpretive Plan, will provide the Tribe with an active start toward developing cultural and heritage attractions and services and making sure that the interpretation of these attractions and services is authentic and maintains the integrity of treasured Yurok cultural resources and history.

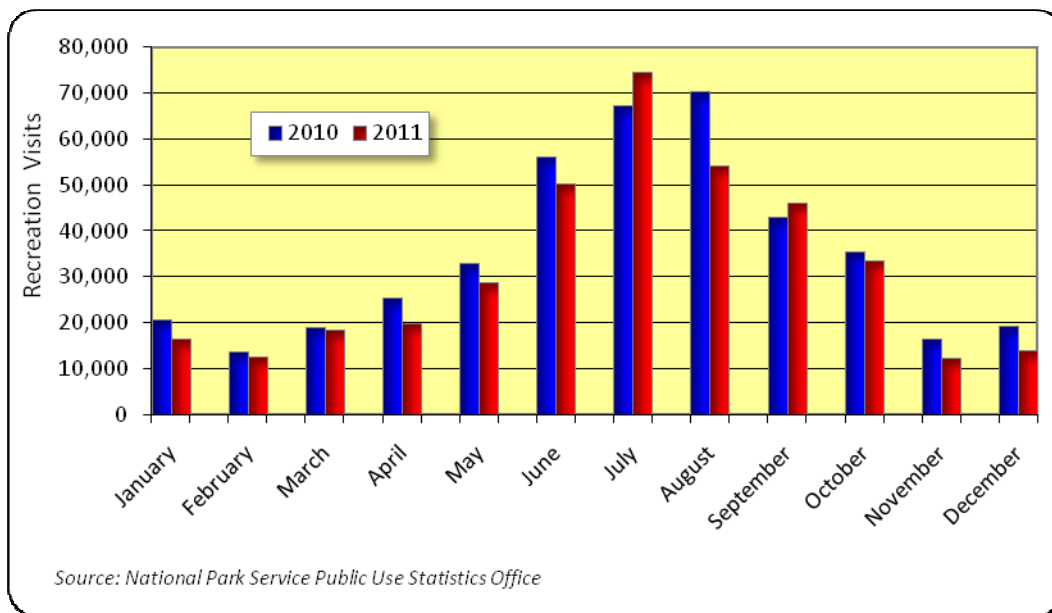
2.3 Existing Visitation

This section presents a variety of statistics and measures to describe the current trends overall and the magnitude of travel to and through the Yurok Scenic Byway region.

Public Destinations and Recreation Amenities

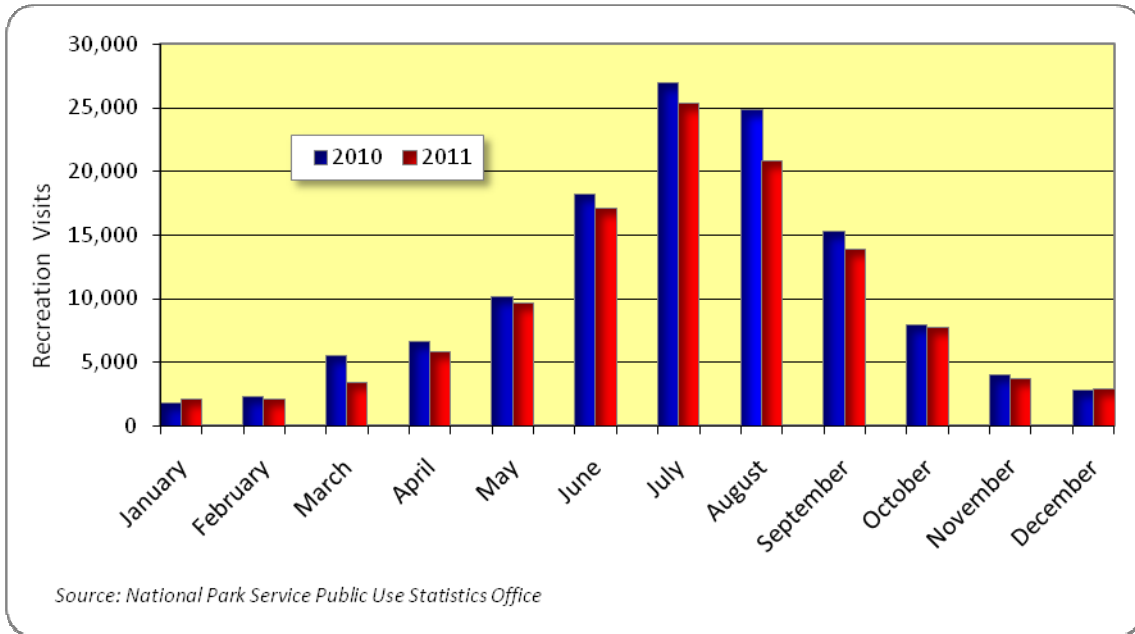
Redwood National and State Parks serves as the primary visitor attraction to Northern California’s Pacific Coast, consisting of four management units: Redwood National Park, under the jurisdiction of the National Park Service; and three state parks – Prairie Creek Redwoods State Park, Del Norte Coast Redwoods State Park, and Jedediah Smith Redwoods State Park. Together the National Park Service and the California State Parks receive approximately 415,000 visitors each year, and cooperatively manage these 133,000 contiguous acres of coastline and redwood parklands in Del Norte and Humboldt Counties. The north-south, mostly two-lane, U.S. Highway 101, the historic coast highway, is the main road through the parks, and provides access to the town of Klamath to north-south bound travelers.

Figure 2.3-1: Redwood National Park Monthly Distribution of Recreation Visits, 2010-11



Located just south of Orick, adjacent to the estuary of Redwood Creek on the southern border of the park, the Thomas H. Kuchel Visitor Center is a convenient stop off the U.S. Highway 101. The newly redesigned exhibits offer an interactive experience for visitors, a wetlands boardwalk, as well as information about the park, exhibits, books, maps, and apparel. All the proceeds from retail sales go into the support the Redwood Parks Association to generate funding for interpretive and educational programs offered throughout the parks along California’s north coast.

Figure 2.3-2: T.H. Kuchel Visitor Center Monthly Distribution of Visits, 2010-11



Three major river systems and numerous coastal streams traverse the parks. These include the Smith and Klamath Rivers, which are part of the federal and state wild and scenic river systems, and portions of Redwood Creek.

Travel Spending

The following table showing Del Norte County Visitor Spending and Related Impacts, 2005-2011(preliminary) provides a detailed summary of the economic impacts directly derived from visitor spending in Del Norte County. As shown below, visitor spending has grown by about 2 percent per year since 2005 (local tax receipts have grown by 5 percent per year). Employment (average annual) has been relatively stable, declining just slightly during calendar year 2010.

Table 2.3-1: Recent Travel Trends in Del Norte County, 2005-2011p
Visitor Spending Impacts

	Visitor	Earnings (\$ Million)	Employment (jobs)	Tax Receipts	
	Spending (\$ Million)			Local (\$ Million)	State (\$ Million)
2005	94.1	40.3	1,670	1.3	3.5
2006	96.5	42.5	1,720	1.5	3.6
2007	98.7	44.2	1,750	1.6	3.6
2008	102.4	46.0	1,730	1.6	3.7
2009	102.0	46.7	1,750	1.6	4.1
2010	103.2	42.0	1,590	1.6	4.2
2011p	108.0	43.3	1,610	1.7	4.2
Annual Percentage Change					
10-11p	4.7%	3.1%	1.3%	8.7%	1.0%
05-11p	2.3%	1.2%	-0.6%	5.0%	3.2%

Estimates for 2011 are preliminary

Source: Dean Runyan Associates

Accommodations

The YSB region has an existing range of accommodations facilities for overnight visitors. For purposes of this review the following represents an inventory of Del Norte County accommodations properties and the total number of overnight units. Note this is a simple inventory and does not assess the quality of overnight lodging opportunities. See Table 2.3-2.

- *Hotel Motel.* Primarily located in Klamath and CrescentCity. Total of 380 units.
- *B&B/Cabins.* Does not include all units, available data indicates 9+ units.
- *Campgrounds.* Most accommodations category in the YSB area with 2,509 units.

Table 2.3-2: Del Norte County Accommodations Properties

Location/Accommodation	Rooms/Sites
Hotels and Motels	
Bay View Inn	67
Oceanfront Lodge (former Hampton Inn & Suites), Crescent City	53
EconoLodge, Crescent City	51
Super 8, Crescent City	49
Quality Inn & Suites, Crescent City	46
Curly Redwood Lodge	36
Travelodge, Crescent City	27
Motel of Trees, Klamath	23
Ravenwood Motel, Klamath	16
Requa Inn, Klamath	12
Cabins/B&Bs	
Castle Island Getaway	1
Rivers West Lodge	6
Cottage By The Sea	
The Rhodes' End Bed and Breakfast	
Middlefork Ranch	
Our Cabin on the River	2
White Rock Resort Cabins	
Woodland Villa Cabins and Country Market	
Anchor Beach Inn	
Campgrounds	
Ship Ashore Best Western RV Park	200
Del Norte Coast Redwoods State Park	145
Camper Corral	140
Village Camper Inn	135
Redwoods RV Resort	125
Patrick's Point State Park	124
Harbor RV Anchorage	123
Hiouchi Hamlet RV Resort	120
Ramblin' Rose Resort	110
Jedediah Smith Redwoods State Park	108
Bayside RV Park	100
Redwood Rest	100
Terwer Park	98
Crescent City Redwoods KOA	94
Salmon Harbor Resort	93
Riverside RV Park	93
Elk Prairie	75
Riverwoods Campground	74
Chinook RV Resort	72
Sunset Harbor RV Park	69
Camp Marigold	40
Panther Flat	39
Steelhead Lodge	36
Blackberry Patch RV Park	35
Crivelli's Trailer Park	31
Mystic Forest RV Park	30
Big Flat	28
Big Lagoon County Park	26
Gold Bluff Beach	25
De Martin	10
Lake Earl/Talawa State Park	6
Nickel Creek Walk-In	5

Source: Dean Runyan Associates

Private Sector Destinations and Recreation Amenities

The following private sector attractions represent those commercial facilities and services that are primarily oriented to non-local visitors.

- *Museums.* A small not-for-profit museum is featured in Trinidad along the northern reaches of the YSB. In addition the Trees of Mystery attraction includes the End of the Trail Museum, featuring Native American artifacts.
- *Guide services.* An array of guide services operating on the Klamath River was noted during the travel information review and via web site research. No formal listing of all operators is available. Note that in addition many guide services operate along several regional rivers depending on conditions. Other regional destination rivers include but are not limited to the Trinity River and the Smith River.
- *Jet Boats.* A jet boat operation is located along the Lower Klamath River. No annual visitor data is available for this visitor service business.
- *Trees of Mystery.* This private sector operated attraction maintains proprietary information about its visitors. However, a provided general estimate indicates approximately 200,000 visitor days per year. The site includes a gondola tree top experience, a museum, and exhibits. A variety of themes are presented most notably Paul Bunyan, a lumberjack figure in North American folklore and tradition.

Implications for the YSB

Per the reviewed attendance data for the wider YAT region, the principal challenge for developing the YSB is the highly peaked summer visitor season along the Redwood Coast presumably due to climate and distance. Simply put, the Redwood Coast remains one of the most remote areas in California. Fortunately the bulk of current visitation is already generated by the Redwood National and State Parks and as such the YSB has the opportunity to attract a portion of this activity while building on existing markets to attract and grow overall future visitation in the region. However, providing an economically sustainable travel destination will require creative promotion and management efforts. For example, funding and developing compelling attractions such as Yurok cultural interpretive facilities, professionally staffing such facilities, and then branding and marketing these attractions will require financial and community commitment to a consistent long term effort.

2.4 Public Input

As part of the planning process we solicited input from Yurok Tribal members and others in the region interested in tourism and recreation development along the YSB. In order to provide the most convenient opportunity for those interested to share their ideas we conducted two all day open house meetings, with one meeting along the lower Klamath River in the town of Klamath, and one meeting concurrently held along the upper Klamath River in Weitchpec.

Open house events were held at Yurok Tribal facilities with each providing a meeting room for Open House exhibits. Among the tools used to generate input, we provided poster-sized maps of the National Scenic Byway System as well as maps of the designated Yurok Scenic Byway Routes and the Klamath River. In addition, we provided poster-sized user input comment boards that allowed attendees to write their suggestions.

Scenic and Viewing Opportunities

Attendees were provided an opportunity to suggest key scenic attractors within the proposed YSB. Under the places-to-see category several options were mentioned which primarily included an array of natural features including Redwood tree groves, waterfalls and river sites, and wildlife viewing opportunities. Interestingly one site, Blue Creek, was mentioned as a place to see and a place not-to-see – Blue Creek is a place of cultural significance and not all tribal members think it should be open to the public. Finally, several tribal members suggested a Yurok working village facility and or Yurok traditional crafts. See Table 2.4.1

Suggested Visitor Activities

The suggested things-to-do are a comprehensive listing of visitor activities many of which reflect the outdoor recreation amenities available within the YSB including fishing, hunting, wildlife viewing, and river-based recreation. However, many of the suggestions focus on not yet available activities but reflect some of the planned projects discussed by Yurok project managers. These include a traditional Yurok Village and Interpretive facilities, both of which are among the discussed development projects indicating a base of support for these investments and the appropriate inclusion in our analysis. In fact, a wide range of cultural and heritage interpretive activities were prominently mentioned by attendees at both locations.

Interestingly, several potential private business enterprises were also suggested indicating that members within the tribe do recognize the long term potential for development. Some of the most interesting mentions included several health related suggestions such as a spa facility, retreats for meditation, poetry and the arts. Finally, several attendees mentioned Yurok guided tours, and specific river recreation facilities. See Table 2.4.2

Table 2.4-1: Public Input at Open House – Places to See in the YSB

Klamath	Weitchpec
<ul style="list-style-type: none"> • Klamath/Trinity confluence • Coon Creek • Pecwan Creek • Sur-pur Creek on the Klamath • Klamath Estuary • Klamath Overlook • Blue Creek • Not Blue Creek 	<ul style="list-style-type: none"> • Village sites or nearby areas • Bald Hills elk viewing areas • Bald Hills raptor viewing (eagle, owl, hawk) • Native plants (basket weaving materials) • Flowering dogwoods – seasonal tours on the upper Klamath • Fall leaf tours on the upper Klamath • Redwood ancient forest (Bald Hills , lower Klamath) • Lady Bird Johnson Grove • Smoker’s Falls (needs new trail) • Fern Canyon and Trillium Falls • Klamath/Trinity River • Reconstruct villages and make visitor friendly • Working Yurok village • People doing traditional activities

Source: Foothill Associates, Chuck Nozicka Consulting

Table 2.4-2: Public Input at Open House – Things to Do Along the YSB

Klamath	Weitchpec
<ul style="list-style-type: none"> • Photography • Hiking • Kite Flying • Bicycling • Whale Watching • Horseback Riding • Visiting Native American Tribes • River Tours (motorized and non-motorized) • Slide shows of area showing interesting locations with distance and transportation options • Slide shows of historical housing on river and cultural designated areas • Learn about regional history • Shop at Pey-mey • Guided surf fishing • Short rides in redwood canoes • Yurok Heritage Visitor Center • Yurok guided activities for schools, tour busses, and organized groups • Information kiosks with Yurok history/culture • Barbecues with traditional foods in season (salmon, steelhead, sturgeon, eels) • Relax • Retreats for meditation, poetry, art, or yoga 	<ul style="list-style-type: none"> • Travel paved Bald Hills Road • Establish fishing accommodations • Jet-boat tours • Eco-lodges for tourism • White water rafting facilities • Guided fishing facilities • Cabin facilities for youth (foster children, scouts, etc.) • Wildlife hunting camps • Hwy 169 improvements (small rest area, two lane road, vista points, names of creeks and villages, interpretive signs) • Botanical tours • Habitat tours • Native American spa retreat • Protect traditional cultural sites • Identify Tribal Zones vs. Tourist Zones • Small cottage industries (fruit farms, berries, etc.) • Tasting of traditional foods (salmon, acorns, etc.) • Buy photography, post cards with Tribal emphasis • Reconstruct the traditional villages • Health and healing focused events, facilities, travel • Bungee jumping • Zipline • Horseback riding • ORV trails • Information about surrounding areas

Source: Foothill Associates, Chuck Nozicka Consulting

Services and Goods

A critical component for long term YSB economic vitality is commercial enterprise including the sales of goods and services or, as presented to elicit suggestions: Services-to-Provide and Things-to-Sell. See Tables 2.4-3, and 2.4.4

Several suggestions reflect previous comments about visitor viewing, recreation, and cultural heritage activities. Most prominently, a proposed Yurok Heritage Center is mentioned along with interpretive guided tours. Clearly participants in the Open House event see the need for developing a built facility to tell the Yurok story and to accordingly generate income and employment. Other suggested business opportunities include eating and drinking establishments, retail operations, and gift shops that feature Yurok made crafts. Also mentioned are additional lodging facilities, campgrounds, and river guiding services and boat rentals. A commuter service providing access to upriver locations was also mentioned. Finally, one attendee suggested restrooms, given the rural character of the YSB and the length and relatively remote nature of the corridor, this suggestion speaks to the traveler’s most practical and simple need.

Table 2.4-3: Public Input at Open House – Services to Provide to YSB Visitors

Klamath	Weitchpec
<ul style="list-style-type: none"> • Guide services • Cannery: fish done different ways, berries • Slide shows of production and preparation methods • Information on natural medicinal plants • Wildflower tours • Yurok themed trail maps • 5-minute language lessons (audio/pushbutton at kiosks) • Boat service to commute up river • Yurok heritage museum/visitor center • Interpretive guides (tours for groups, schools by foot, vehicles, boat) • Lodging • Campsites (not RV parks) • Traditional foods 	<ul style="list-style-type: none"> • Nature guides • Visitor center on Fish Lake • Visitor center on Klamath River • River guide services • Canoe rental services • Small hamburger/hot dog stand, drinks, sno-cones, etc. • Tulley Creek Bar and Grill • Store at the end of Johnsons • Small airport • Internet access • Native craft gift shop • Restaurant/small café • Laundromat • Coffee shop with bakery • Charge tourists for river access • Rest rooms • Emergency call boxes • Visitor information • Interpretive services

Source: Foothill Associates, Chuck Nozicka Consulting

Among the suggested goods to sell category, attendees’ comments focused on two groups of products – food and native crafts. Some suggestions revolving around food products included locally produced items such as salmon and eel products, and forest-related foods such as berries, berry jams, acorn flour, and herbs and spices. Reflecting the established desire to interpret Yurok culture and heritage, also mentioned were arts and crafts products such as jewelry, pottery, basketry, and artwork. See Table 2.4.4

Table 2.4-4: Public Input at Open House – Things to Sell to YSB Visitors

Klamath	Weitchpec
<ul style="list-style-type: none"> • Different berries at various locations • Jellies and jams • Kippered salmon • Half smoked eels (canned or packaged) • Crafts • Tools • Wildflowers and seeds • Histories • Eels • Acorn flour • Huckleberry products • Salmon cooking sticks • Carved elk horn spoons • Scale model canoes and paddles • Post cards • Calendars • Maps • Jet-boat rides • Baskets and other traditional gifts • Jewelry 	<ul style="list-style-type: none"> • Indian baskets • Smoked salmon • Farmers Market goods • Indian spices/herbs • Native food products • Jewelry, pottery, bow & arrows, etc. • Calendar with seasonal harvest (acorns, hazel sticks, etc.) • Yurok tribal member arts and crafts • Post cards with tribal emphasis • Yurok language posters • Woodwork products • Artwork

Source: Foothill Associates, Chuck Nozicka Consulting

YSB Logo Design Elements

As part of the Open House public input process, attendees reviewed several scenic byway logo examples and then suggested the key elements that should be included in a future YSB logo. See Table 2.4-5. The results yielded a clear preference for a logo that reflects the Yurok Tribe’s heritage as a river people and the art work most associated with this heritage. The most mentioned design elements included: The river, salmon, basketry, and Redwood trees. As the YSB proceeds with branding and product development efforts these suggested motifs may inform associated marketing, planning and design work, and byway directional and interpretive signage.

Table 2.4-5: Public Input at Open House - Suggested Logo Design Elements for the YSB

	Klamath	Weitchpec	Total
The River	24	14	38
Salmon	14	9	23
Baskets	6	17	23
Redwood Trees	14	9	23
Redwood Canoe	11	8	19
The Ocean	9	5	14
Plank House	4	7	11
Language	9	1	10
Elk	5	1	6
Sea Stacks	3	1	4
Eels	2	1	3
The Mouth*	1	-	1
Tribal Seal**	1	-	1
Yurok People	-	1	1
Mountains	-	1	1
Eagle	-	1	1
TOTAL	103	76	179

*Oregon, river, sandspit

** or portions of the Tribal Seal that would be readable at 50 MPH

Source: Foothill Associate, Chuck Nozicka Consulting

Implications for the YSB

Per the reviewed data and supported by public comments at the Open House events by Tribal members and others who attended the events, the findings indicate that developing an array of facilities will be necessary to raise the visibility of the YSB region as a general travel destination. Our research also indicates that doing so would set the YSB apart from other Indian tourism programs in California. Principal among these facilities is the often mentioned Yurok Cultural Heritage Visitor Center with the addition of a working Yurok traditional Village, a superb complementary cultural attraction. In addition, expanded events, arts and craft programs, and enhanced river transportation facilities will begin to promote an integrated YSB program that can serve as a sustainable regional tourism destination.

Associated with these mentioned opportunities is the need for private enterprise development. Attendees at Open House events made it clear that private business can and should provide an array of visitor facilities and services. Attendees presented a range of business development ideas including additional lodging facilities, with special attention of the need for eating and drinking establishments. In addition, sales of Yurok-made arts and crafts may further enhance the YSB as a noteworthy cultural and heritage destination while providing Yurok Tribe members with business and employment opportunities.

2.5 Comparable Tribal Destination Areas with Scenic Byways

This section investigates a selection of comparable scenic byway destination areas with a focus on the Tribal participation in scenic roadway promotion efforts, cultural/heritage attractions, and related visitor services and amenities offered by the associated Tribe. Three broadly defined regions, with a diversity of Tribal nations, were reviewed: Oregon, Washington and Idaho; Southwest (Nevada, Arizona, and Oklahoma); and Upper Missouri River: North Dakota and South Dakota. Examples were selected with consideration of the unique and desirable aspects of Tribal participation, marketing efforts, and operation of facilities in relatively well-known destinations areas located in areas where scenic roadways are considered an important tourism development tool.

While this selection of scenic byway orientated destination areas are just as diverse and different from one another as the Tribes themselves, there are some common attributes to keep in mind:

- Selected areas are located in rural areas that function as a significant visitor destination within the state or region.
- Destination areas often include a key attraction such as a national park, monument, or scenic landscape, as well as a diverse array of outdoor recreation opportunities.
- Scenic byways (or roadways) are the primary means by which visitors travel to and through the area and are promoted as a scenic attraction.
- Tribal revenues are, in large part, generated through the operation of hotels, motels, restaurants, casinos, and other visitor-related services.
- Most of the tribal communities manage a museum and/or cultural heritage center with a retail venue offering a selection of traditional and contemporary arts, crafts, and music.
- Tribes living in these areas host many Pow Wows, community celebrations, and public events throughout the year, though most are oriented to the summer season.
- Local, non-tribal communities benefit, too, in the form of jobs and financial support for essential government services.

Detailed features and attributes are summarized in Tables 2.5-1 thru 2.5-6. The information for each area varies to some degree on the basis of information provided by staff and available from websites, publications, and other sources.

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

Table 2.5-1: Tribal Destination Areas with Scenic Roadways - Characteristics and Travel Corridor

TRIBAL DESTINATION AREAS WITH SCENIC BYWAYS				
REGION	TRIBAL NATION	CHARACTERISTICS		TRANSPORTATION CORRIDOR
		LOCATION	TRIBAL AFFILIATIONS	PRIMARY ROADWAY/ TRAVEL ROUTE DESTINATION AREA ATTRACTIONS
OREGON, WASHINGTON & IDAHO	Confederated Tribes of the Umatilla Indian Reservation	Pendleton, Oregon (Columbia River Gorge)	Confederated Tribes of the Umatilla Indian Reservation: Cayuse, Umatilla, and Walla Walla	Interstate 84 (in Oregon) Columbia River Gorge National Scenic Area, Pendleton Round-Up & Rodeo, Pendleton Woolen Mills
	Confederated Tribes of the Warm Springs Reservation	Warm Springs, Oregon (central Oregon)	Traditional tribes and bands: Warm Springs, Wasco, & Northern Paiute	U.S. Route 26 (in central Oregon) Natural Hot Springs, Metolius River, and Lake Billy Chinook
	Confederated Tribes of Siletz Indians	Siletz, Oregon (central Oregon Coast)	Confederation of 27 bands including Chinook, Clatsop, Tillamook, and others	U.S. 101 (in Oregon) Scenic Siletz River, Pacific Ocean Beaches, Yaquina Bay, Whale Watching, Tanger Outlet Center
	Quinalt Indian Nation	Taholah, Washington	Quinalt Tribe and six other coastal Tribes: the Hoh, Quileute, Queets, Chehalis, Chinook, and the Cowlitz	Highway 101 as it loops around Olympic Peninsula to Highway 110 Olympic National Park
	Makah Indian Nation	Neah Bay, Washington	Makah Indian Tribe	State Route 112 (named the Strait of Juan de Fuca Highway) Cape Flattery, Neah Bay, Olympic Coast National Marine Sanctuary, Makah National Fish Hatchery
	Muckleshoot Indian Tribe	Auburn, Washington	Descendents of area's Coast Salish peoples	State Route 167 connects to State Route 410 (Chinook Scenic Byway) Mount Rainer National Park White River Amphitheater (outdoor music center)
	Squaxin Island Tribe	Shelton, Washington (inlets of southern Puget Sound)	The Squaxin Island Tribe is made up of several Lushootseed clans	Highway 101 (around the Olympic Peninsula and down the Pacific Coast) Olympic National Park, Quinalt Lake and Rain Forest Nature Trail
	Confederated Tribes & Bands of Yakama Nation	Toppenish, Washington	Fourteen bands compose the Yakama Nation	State Route 97 South Central Washington
	Confederated Tribes of the Colville Reservation	near Nespelem, WA	The Confederated Tribes of the Colville Reservation is composed of twelve tribes.	parts of three highway routes -- SR 155, US 2 and SR 17 -- in north-central Washington The Columbia River, Grand Coulee Dam, Lake Roosevelt, Omak Stampede
Nez Perce Tribe	Lapwai, Idaho	Nez Perce bands throughout the area now known as Idaho, northeastern Oregon, and southeastern Washington.	Wallowa Valley, Oregon to north-central Montana (five designated Auto Tour routes) Sacajawea Interpretive, Educational & Cultural Center, Salmon, ID	

Source: Dean Runyan Associates; Chuck Nozicka Consulting

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

Table 2.5-1: Tribal Destination Areas with Scenic Roadways - Characteristics and Travel Corridor (cont.)

		TRIBAL DESTINATION AREAS WITH SCENIC ROADWAYS				
		TRIBAL NATION	CHARACTERISITICS		TRANSPORTATION CORRIDOR	
			LOCATION	TRIBAL AFFILIATIONS	PRIMARY ROADWAY/ TRAVEL ROUTE	
					DESTINATIO AREA ATTRACTIONS	
REGION	SOUTHWEST	Pyramid Lake Paiute	Pyramid Lake, Nevada	Pyramid Lake Paiute Tribe	Nevada State Routes 445 and 447	Pyramid Lake, Tufa Formations, Wildlife Viewing at Anaho Island National Wildlife Refuge, Pyramid Lake Paiute Tribe Museum
		Hopi Tribe	Kykotsmovi, Arizona	The Hopi Tribe	Arizona State Route 264	12 villages on 3 mesas within 1.3 million acres, Wupatki National Monument, Homolovi State Park Ancestral Hopi Villages, Navaho Interactive Museum
		The Navajo Nation	Window Rock, Arizona	The Navajo Nation	US Highway Route 66, multiple Arizona, New Mexico, Utah and Colorado State Routes	Canyon de Chelley National Monument, Monument Valley National Navajo Tribal Park, Navajo Nation Zoological & Botanical Park, Window Rock Monument and Veterans Memorial Park, Chaco Canyon National Historic Park
		The Cherokee Nation	Tahlequah, Oklahoma	The Cherokee Nation	Oklahoma State Routes 10, 82, 100	Tsa La Gi Ancient Village, Cherokee Heritage Center, Adams Corner Rural Village, Cherokee National Museum, NDN Art Gallery, Cherokee Artist Association Gallery, Jane Osti Studio.
REGION	UPPER MISSOURI RIVER: NORTH DAKOTA & SOUTH DAKOTA	Standing Rock Sioux Tribe	Fort Yates, North Dakota	Standing Rock Sioux Tribe	North Dakota Scenic Byway Route 1806 and North Dakota State Route 24	Chief Sitting Bull's burial site, Holy Hills of the Mandan Indians site, Standing Rock Monument, Standing Rock Buffalo Pasture
		Lower Brule Sioux Tribe	Lower Brule, South Dakota	Kul Wiscasa Oyote	South Dakota Scenic Byway Route 1806, BIA Route 10	Buffalo and Elk Preserve, Buffalo Interpretive Center and herd
		Crow Creek Sioux Tribe	Fort Thompson, South Dakota	Crow Creek Sioux Tribe	South Dakota Scenic Byway Route 1806	Akata Lakota Museum and Cultural Center, Lewis and Clark Interpretive Center
		Cheyenne River Sioux	Eagle Butte, South Dakota	Cheyenne River Sioux	South Dakota Scenic Byway Route 1806	Hunting and fishing featured
		Sisseton Wahpeton Oyate Tribe	Agency Village, South Dakota	Sisseton and Wahpeton Oyate Sioux Tribes	South Dakota Scenic Byway Route 1806	Nicolette Interpretive Center and Tower, Sica Hollow State Park

Source: Dean Runyan Associates; Chuck Nozicka Consulting

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

Table 2.5-2: Tribal Destination Areas with Scenic Roadways - Scenic Byway Promotion and Cultural Heritage Attractions

TRIBAL DESTINATION AREAS WITH SCENIC BYWAYS							
TRIBAL NATION	SCENIC ROADWAY PROMOTION EFFORTS			CULTURAL/HERITAGE ATTRACTIONS			
	SCENIC BYWAYS (YEAR OF DESIGNATION)	FEDERAL	STATE	CULTURAL CENTER/MUSEUM	PRIMARY EXHIBITS	TRIBAL EVENTS/ACTIVITIES	
REGION OREGON, WASHINGTON & IDAHO	Confederated Tribes of the Umatilla Indian Reservation	Blue Mountain Scenic Byway, Lewis & Clark Bicentennial in Oregon	Y	Y	Tamastslikt Cultural Institute	Interactive exhibits and a Living Culture Village, library, café, and gift store	Wildhorse 4th of July Powwow, Balloon Bash (October), Tamastslikt Twilight Parade 7 Annual Tribal Art Show (August)
	Confederated Tribes of the Warm Springs Reservation	None are currently designated	N	N	The Museum at Warm Springs	Permanent collection of historic artifacts and photographs. Interactive, multimedia exhibits that include a Wasco wedding, song chamber, and traditional Hoop Dance	Huckleberry Harvest Dinner, Native American Heritage Art Market
	Confederated Tribes of Siletz Indians	Pacific Coast Scenic Byway -- Oregon (June, 1998)	Y	Y	Siletz Tribal Cultural Center	Collection of historical artifacts, baskets, clothing, and regalia	Nesika Illahee Powwow (August), Run to the Rogue (September)
	Quinault Indian Nation	Pacific Coast Scenic Byway -- Washington	N (state only)	Y	Quinault Cultural Center & Museum	Collection of natural and cultural artifacts from Quinault Country	Chief Taholah Days -- parade, baseball, canoe races, salmon bake, fireworks (July)
	Makah Indian Nation	Strait of Juan de Fuca Highway (June, 2000); Cape Flattery Tribal Scenic Byway	Y	Y	Makah Cultural & Resource Center	Life-size reproduction of a longhouse & artifacts of a 3,000 year-old fishing village	Makah Days Celebration
	Muckleshoot Indian Tribe	Chinook Scenic Byway (June, 1998)	Y (All-American Road)	Y	None	Not applicable	Skopabsh Days (August)
	Squaxin Island Tribe	Pacific Coast Scenic Byway -- Washington	N (state only)	Y	The Squaxin Island Museum Library and Research Center	A series of exhibits and displays depicting the relationship between Squaxin Island Tribal members and the seven inlets of South Puget Sound.	Paddle to Squaxin 2012, SalmonFest, Sa-Heh-Wa-Mish Days, an annual powwow, and the First Salmon Ceremony
	Confederated Tribes & Bands of Yakama Nation	Yakama Scenic Byway	Y	Y	Yakama Nation Museum & Cultural Center	Life size dwellings of the Plateau People and dioramas and exhibits that tell the story of the Yakama people.	Toppenish Powwow & Rodeo, July 4th annually
	Confederated Tribes of the Colville Reservation	Coulee Corridor National Scenic Byway	Y	Y	Colville Confederated Tribal Museum	Story of the 12 Tribes of the Reservation and how they lived in the Coulee Corridor region.	Fourth of July Powwow, Omak Stampede (August)
Nez Perce Tribe	Nez Perce National Historic Trail Auto Route (established in 1986)	Y (National Park Service)	Y (Idaho, Montana, Oregon, Washington)	Nez Perce National Historic Park/Nez Perce (Nee-Me-Poo) National Historic Trail	Informational center and museum featuring historical displays and interpretive programs (24 separate interpretive sites)	Chief Joseph Days; Nez Perce Art in Wallowa (September)	

Source: Dean Runyan Associates; Chuck Nozicka Consulting

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

TABLE 2.5-2: Tribal Destination Areas with Scenic Roadways - Scenic Byway Promotion and Cultural Heritage Attractions (cont.)

TRIBAL DESTINATION AREAS WITH SCENIC ROADWAYS								
REGION	TRIBAL NATION	SCENIC ROADWAY PROMOTION EFFORTS			CULTURAL/HERITAGE ATTRACTIONS			
		SCENIC BYWAYS DESIGNATION)	(YEAR OF DESIGNATION)	FEDERAL	STATE	CULTURAL CENTER/MUSEUM	PRIMARY EXHIBITS	TRIBAL EVENTS/ACTIVITIES
SOUTHWEST	Pyramid Lake Paiute	Pyramid Lake Scenic Byway		Y	Y	Pyramid Lake Paiute Tribe Museum and Visitor Center	Displays of tribal culture and history.	Pyramid Lake Sunrise Ceremony (May), Sacred Visions Pow wow (July)
	Hopi Tribe	None are currently designated		N	N	Hopi Cultural Center, Sispaulovi Visitor Center	Exhibits of Hopi art and artisans, guided walking tour through a Hopi living village	Art show, social dances and colorful activities re hosted at the 12 villages throughout the year. Schedule in e-newsletter.
	The Navajo Nation	Trail of the Ancients National Scenic Byway, Navajo Scenic Byways: Dine' Tah, Naat'tsis'aaan, Tse'nikant, Flat Mesa Rock, Dine Bitah, Kayenta-Monument Valley, Fredonia-Vermillion Cliffs.		Y	Y (Also designated and managed by the Navajo Nation)	Navajo Museum Library & Visitors Center, Navajo Codetalkers Museum, Navajo Interactive Museum	Native displays book and gift shop auditorium and outdoor amphitheater, Machinery and tools used in battle and victory stories, Navajo guided experience including a traditional Navajo Hogan (home)	Navajo Treaty Day Celebration (Jan), Monument Valley Balloon Event (Feb), Navajo Nation Fair (Sept),
	The Cherokee Nation	Cherokee Hills Byway		Y	Y	Tsa-La-Gi Ancient Village, Cherokee National Museum, Cherokee Heritage Center	Replica village with living history including flint knapping, basketry, pottery, and bow-making, Trail of Tears Exhibits, Cherokee History including Cherokee Nation prison and supreme court building.	Cherokee National Holiday Powwow (Sept), Cherokee Art Market (Oct)
UPPER MISSOURI RIVER: NORTH DAKOTA & SOUTH DAKOTA	Standing Rock Sioux Tribe	Native American National Scenic Byway		Y	Y	N	n/a	Pow Wow (Memorial Day Weekend, and August)
	Lower Brule Sioux Tribe	Native American National Scenic Byway		Y	Y	Buffalo Interpretive Center	Exhibits, videos and a 100 head Buffalo herd	Pow Wow
	Crow Creek Sioux Tribe	Native American National Scenic Byway		Y	Y	Akta Lakota Museum and Cultural Center	Interprets tribe culture with art artifacts and Camp Circle Exhibit, and the Battle of the Little Bighorn	Pow Wow (Memorial Day Weekend, and August)
	Cheyenne River Sioux	Native American National Scenic Byway		Y	Y	N	N/A	Pow Wow (June, July, November)
	Sisseton Wahpeton Oyate Tribe	Native American National Scenic Byway		Y	Y	Nicolette Tower and Interpretive Center	Tells story of first French mapmaker and includes tower structure with views of 3 surrounding state	Wacipi Pow Wow

Source: Dean Runyan Associates; Chuck Nozicka Consulting

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

Table 2.5-3: Tribal Destination Areas with Scenic Roadways - Lodging/Casino Operations, Recreation, and Arts

TRIBAL DESTINATION AREAS WITH SCENIC BYWAYS									
REGION	TRIBAL NATION	LODGE/CASINO OPERATIONS			TRIBAL CULTURE & ART			CONTACT	NOTES
		CAMPING/RV PARK	HOTEL/LODGE	CASINO	GUIDED TOURS	DEMONSTRATIONS	TRADITIONAL CRAFTS FOR SALE		
OREGON, WASHINGTON & IDAHO	Confederated Tribes of the Umatilla Indian Reservation	Y	Y	Y	N	Y	Y	www.quinaultindiannation.com/	
	Confederated Tribes of the Warm Springs Reservation	Y	Ka-Nee-Ta High Desert Resort & Casino	Ka-Nee-Ta High Desert Resort & Casino	Kayaking and Horseback Riding	Y	Beadwork and arts for sale in museum	www.warmsprings.com	Ka-Nee-Te Resort offers Teepee Camping
	Confederated Tribes of Siletz Indians	Y	Y	Y	N	N	N	www.ctsi.nsn.us	
	Quinault Indian Nation	Y	Quinault Beach Resort and Casino	Quinault Beach Resort and Casino	Fishing and Beach Hiking	N	N	www.quinaultindiannation.com/	
	Makah Indian Nation	Hobuck Beach Resort	Hobuck Beach Resort	N	Cape Flattery	Y	Y	www.makah.com	
	Muckleshoot Indian Tribe	Y	Salish Lodge & Spa	Muckleshoot Casino	N	N	N	www.muckleshoot.nsn.us	White River Amphitheater -- a joint venture of the Muckleshoot Tribe and Clear Channel Communications
	Squaxin Island Tribe	Y	Little Creek Casino Resort	Little Creek Casino Resort	Museum tour available	Basket and textile weaving, carving, painting, dancing, drumming, singing	Y	www.squaxinisland.org	
	Confederated Tribes & Bands of Yakama Nation	Y	N	Y	Museum tour by appointment	Dance performances by appointment, beading classes	Yakama beadwork, baskets, & other artwork	www.yakamamuseum.com	
	Confederated Tribes of the Colville Reservation	Y	Rainbow Beach Resort (cabin rentals and RV services)	Mill Bay Casino, Coulee Dam Casino, Okanogan Bingo Hall	N	N	Trading Post Store -- handcrafted beadwork	www.colvilletribes.com	
Nez Perce Tribe	N	N	Y	N	Beading and weaving at Nez Perce National Historic Park	Beading and crafts available a Clearwater River Casino	www.crcasino.com/	Nez Perce Tribal Tourism Office is located inside the Clearwater River Casino.	

Source: Dean Runyan Associates; Chuck Nozicka Consulting

YUROK SCENIC BYWAYS ECONOMIC IMPACT STUDY

TABLE 2.5-3: Tribal Destination Areas with Scenic Roadways - Lodging/Casino Operations, Recreation, and Arts (cont.)

TRIBAL DESTINATION AREAS WITH SCENIC ROADWAYS										
REGION	TRIBAL NATION	LODGE/CASINO OPERATIONS			TRIBAL CULTURE & ART			CONTACT	NOTES	
		CAMPING/ PARK	RV	HOTEL/LODGE	CASINO	GUIDED TOURS	DEMONSTRATIONS			TRADITIONAL CRAFTS FOR SALE
SOUTHWEST	Pyramid Lake Paiute	Y		Y	Y	Fishing	N	N	www.pyramidlake.us ; www.plpt.sns.us	
	Hopi Tribe	N		Moenkopi Legacy Inn, Hopi Cultural Center Inn	N	Guides certified by the Hopi Tribe	Y	TUUVI Travel Center Stores	www.experincehopi.com	Hopi lands are within the Navajo Nation reservation, features 12 living villages among the 3 mesas that provide guided tours
	The Navajo Nation	Y		Y	Fire Rock Navajo Casino, Northern Edge Navajo Casino	Y	Y	Y	www.discovernavajo.com	Navajo Nation lands comprise 25,000 square miles (16 million acres) and includes the four corner states of Arizona, New Mexico, Utah, and Colorado
	The Cherokee Nation	Y		Y	Y	Y (At historic sites)	Y	Y (Several retail locations and Cherokee-operated galleries)	www.cherokeetourismok.com	
UPPER MISSOURI RIVER: NORTH DAKOTA & SOUTH DAKOTA	Standing Rock Sioux Tribe	Y		Y	Prairie Knights Casino Resort	None listed	N	None Listed	www.standingrocktourism.com	
	Lower Brule Sioux Tribe	Y		Y	Golden Buffalo Casino Complex	Y (Site specific and scenic)	Y	Y (Sun Maka Ska markets)		
	Crow Creek Sioux Tribe	Y		Y	Lode Star Casino and Hotel	Y	None listed	Y		
	Cheyenne River Sioux	Y		Y	N	None listed	N	N	www.crstgfp.com	Reservation lands comprise 2.5 million acres, about the same size as Connecticut
	Sisseton Wahpeton Oyate Tribe	Y		Y	Dakota Magic Casino, Dakota Connection Casino	None listed	N	N	www.oyatetourism.com	Reservation comprises 106, 153 acres

Source: Dean Runyan Associates; Chuck Nozicka Consulting

Implications for the YSB

The review of comparable Indian Scenic Byway programs provides a primary over-arching finding – the scenic byway banner often functions as a stand-in for a comprehensive tourism development effort. While these comparable destinations include a range of development intensity and resultant visibility, for most, the byway is a primary tool for integrating a full array of visitor attracting facilities and services. This indicates that the YSB program has the opportunity to apply an integrated approach, including facilities (such as hotels and cultural centers), services (such as guide and arts programs) and marketing efforts (such as advertising and websites), to grow the overall tourism sector for the cultural and economic benefit of the Yurok Tribe and its members.

2.6 Summary of Findings and Implications for the YSB

The analysis presented in this chapter provides a range of findings that have direct implication for YSB planning and development. Additionally, the findings provide the basis for our YSB roadway opportunity evaluation and the economic impact assessment.

YSB as a Recreation Destination. National outdoor recreation trends for the types of activities available in the YSB region indicate sustainable to strong growth. Moreover, California demand for these activities indicates a shortage of supply. Finally, existing data regarding current use within the wider region indicate an active recreation population. These findings indicate that the YSB can be positioned as a featured Northern California recreation destination.

YSB as a Cultural Heritage Destination. Similar to outdoor recreation, national and regional trends indicate that the character and amenities of the YSB put it squarely in the path of a robust cultural and heritage market. In fact, since we found no other California tribes that have focused on developing their region as a cultural and heritage resource, the Yurok Tribe has an opportunity to position the YSB as a premier California Indian heritage destination.

Seasonal Visitation. The principal challenge for the opportunities listed above is the highly peaked summer visitor season along the Redwood Coast presumably due to climate and distance – the Redwood Coast remains one of the most remote areas in California. Providing an economically sustainable travel destination will require creative promotion and management efforts. Fortunately the bulk of current visitation is already generated by the Redwood National and State Parks and as such the YSB can build on this existing market.

YSB Facility Development. Tribal members, YSB project managers, and the review of comparable Indian scenic byway programs indicates that developing an array of facilities will be necessary to set the YSB apart from other Indian tourism programs in California and to raise the visibility of the YSB region as a general travel destination. Principal among these is a Cultural Heritage Visitor Center with the addition of a working Yurok traditional Village, a superb complementary cultural attraction. In addition, expanded events, arts and craft programs, and enhanced river transportation facilities will begin to promote an integrated YSB destination.

YSB Business Development. Associated with these mentioned opportunities is the need for private enterprise development including additional lodging facilities, with special attention to eating and drinking establishments. In addition, sales of Yurok-made arts and crafts may further enhance the YSB as a noteworthy cultural and heritage destination.

Comprehensive YSB Tourism Program. The review of existing Indian Scenic Byway programs indicates that the scenic byway banner often functions as a stand-in for a comprehensive tourism development effort. Among these comparable destinations is a range of development intensity and resultant visibility. Clearly the YSB has the opportunity to apply an integrated approach to developing the overall tourism sector for the Yurok Tribe.

3.0 ROADWAY OPPORTUNITY EVALUATION

3.1 Overview

The Yurok Scenic Byway Program exists to promote awareness of significant transportation routes and the surrounding landscapes within the boundaries of the Yurok Ancestral Territory. The Yurok Ancestral Territory is a place of unique and stunningly beautiful landscapes. It is also the setting for the age old story of the Yurok people, whose history, culture, and identity are inseparable from the place itself. The Yurok people have traveled extensively throughout the area for millennia, in an intimate relationship with its rivers, forests, mountains, beaches, and the ocean. These ancient routes created by the Yurok people in their pursuit of sustenance, shelter, community, and knowledge continue to play a vital role for the Yurok Tribe and are the inspiration for the Yurok Scenic Byway.¹

This section considers the unique nature of the Yurok culture and surrounding landscape and accordingly presents complementary tourism development opportunities.

3.2 YSB Routes

As of 2012, five transportation routes have been designated for inclusion in the YSB Program (Figure 3.2-1). The designated routes are:

- State Route 101 within the Yurok Ancestral Territory approximately from Little River (south) to Damnation Creek (north)
- State Route 169 including both the southern segment from Weitchpec to Wautec and the northern segment from Klamath Glen to Klamath
- Bald Hills Road from Tulley Creek Road to State Route 101
- Requa Road/Patrick J. Murphy Memorial Drive from State Route 101 to the Klamath River Overlook
- State Route 96 within the Yurok Reservation

Other routes including trails, waterways, or roads may be added in the future consistent with the adopted designation process. While some of these routes may not be eligible for designation under the byway programs managed by other jurisdictions, such as the California Scenic Highway and the National Scenic Byway programs, they are significant transportation resources to the Yurok Tribe.

¹ *Yurok Scenic Byways Policies and Procedures*, 2010.

Figure 3.2-1: Yurok Scenic Byway Designated Routes



3.3 Opportunities

As presented above, the YSB features an array of development opportunities that cover a range of visitor attractors.

Scenic Qualities. The YSB features some of the most scenic landscapes on the West Coast of the United States. Certainly the visitation reported at Redwood National Park reflects the desire of visitors to take the time to travel to this region and experience natural scenic wonders.

Recreation. Inherent in this natural landscape is a range of outdoor recreation activities. Position these activities in the context of a world class scenic landscape and the YSB is presented with an opportunity to not only increase regional visitation but to focus its development and marketing efforts toward specific and potentially lucrative targeted recreation market segments.

Culture and Heritage. The YSB features the potential to develop an array of cultural and heritage attractors. While the stories that may be told are extensive, the facilities to date are limited to the Patrick's Point State Park Yurok Village site. The wider development effort represented by the YSB can further enhance the positioning of the region as a cultural and heritage destination, but more importantly, provide a foundation for cultural and heritage facility development.

Hospitality Services. The YSB region is currently served by a modest number of hospitality businesses particularly when considering the targeted cultural and heritage travel market and its higher potential economic impact. As the YSB program evolves and product development and marketing efforts yield results, there may be an emerging opportunity for private entrepreneurs to enter the market and provide additional visitor serving amenities.

3.4 Constraints

There are certain conditions inherent in the routes that provide challenges to tourism development and YSB related visitation.

Road Conditions. Road conditions along many sections of the route will need some improvement, particularly those in remote areas such as the Bald Hills Road. Additionally, Highway 169 along the Klamath River is a narrow route currently serving resident populations. We anticipate that any transportation access assessments will recommend road improvements as well as visitor serving convenience such as turn outs, rest rooms, overlooks, and recreation trail access.

Seasonality. Extending the current peak summer travel season will be the YSB primary economic development challenge. Sustainable businesses and employment will necessitate creative ways to attract visitors to the region at least during the shoulder seasons.

Remote Location. The Redwood Coast is a demanding drive from many California population centers as well as from points of entry for out-of-state visitors to California. The YSB program certainly cannot make the trip any quicker or easier; however, providing a comprehensive visitor destination featuring lodging, eating and drinking, shopping opportunities and a full array of recreation and heritage activities may encourage travelers to make the investment in time and money to seek out the YSB as a destination.

Investment Funding. All of the discussed development projects will need public and private financing for site planning, construction, operations, and marketing. This investment will not be inconsequential. Finding sources for investment capital either via Tribal funds, public funds, grants, or willing private investors will remain a challenge.

Program Sustainability. The YSB program and its potential components that may have a significant impact on the Yurok Tribe will require a long term effort. Extended efforts require planning, due diligence, the above mentioned investment capital, and most importantly sustainable community-wide participation. This is a challenge for any rural community development project and will certainly be a challenge for the Yurok Tribe to sustain this level of effort as it slowly develops during the future years.

3.5 Potential Goods and Services Sectors

Attractions and Activities

The YSB program provides several opportunities to develop visitor services and employment opportunities producing cultural and recreation attractions.

Visitor and Cultural Center. A featured facility at many Indian Scenic Byway destinations, the proposed Visitor and Cultural Center can provide a range of interpretive opportunities as well as venues for visitors to purchase goods through an arts and crafts center, learn traditional Yurok arts, and hire guides for educational tours in the YSB region.

Living Culture Yurok Village. A proposed traditional Yurok living culture village, especially if located on the Klamath River can influence travelers to take guide boat shuttles to the site, watch Yurok artisans at work, and attend visitor-oriented ceremonies.

Events. Currently the Yurok Tribe hosts an annual Salmon Festival. Designation of the YSB and a related enhanced visitor sector development effort may not only influence expansion of the festival but also encourage establishment of one or more additional shoulder season focused events including festivals and brush dance performances.

Boat Tours. The Klamath River is positioned as the centerpiece of the YSB. Its scenic qualities provide the opportunity to develop a boat tour sector which could include Yurok interpretive guides and visits to purpose designated shoreline sites and trails.

Other Recreation Amenities. Primary among these are river activities such as kayaking and rafting, as well as other recreation boating, and fishing opportunities. In addition, a

comprehensive and interpreted trail system within the YSB could provide a development opportunity. First, independent users of these amenities would be encouraged to extend their stay overnight in the YSB region and purchase goods and services. A second direct benefit would provide venues for individual guides to lead paid tours throughout the YSB.

Accommodations

The Yurok Scenic Byway Program provides opportunities for accommodations development, with several general lodging options mentioned by Tribal members and staff.

Klamath Hotel. The Yurok Tribe is currently planning for a lodging property in the Town of Klamath. In the context of the YSB, Yurok design elements and motifs that signal a stay in a special region would enhance the YSB as a destination. Several researched comparable Indian scenic byways have also featured themed or culturally driven lodging property designs, most notably the recent Hopi Indian hotel/resort in Northern Arizona.

River Lodges. During the initial YSB site tour the consulting team was hosted by a tribal member who has established a small river lodge business that includes three cabins. This provides a template for future river lodge development including clusters of similar cabin facilities.

Campgrounds. Mentions in the Open House sessions indicated interest in developing YSB campgrounds. While there is an ample current inventory of camping facilities in the wider region, campsites that represent the highest quality experience and which feature connectivity to YSB activities and cultural amenities could be an asset to YSB development efforts.

Services

The YSB program may provide an opportunity for an array of private commercial services, including eating and drinking establishments, art galleries, guide services, and personal services such as spa and healing facilities.

Guide Services. Complementing the wide array of outdoor recreation amenities, especially the Klamath River, there is potential to develop a Yurok-certified guiding sector for fishing, recreation, and interpretive trail activities. Somewhat related to this service may be shuttle service for independent individual boaters who want to float the river but who need a commercial service to shuttle members back to put-in locations and their personal vehicles.

Healing Spas and Retreat Facilities. This idea was a prominent mention in the Open House sessions. Healing arts are considered a Yurok tradition and may represent an investment opportunity for serving destination travelers. Health-related destinations have reportedly seen increasing demand from an aging and health conscious California resident and visitor population.

Eating and Drinking Establishments. Open house mentions and the project team assessments indicate the opportunity for additional eating and drinking establishments. However, given the preferences among the sophisticated cultural and heritage market we anticipate those

establishments that feature locally grown and high quality dining opportunities would have the greatest potential to complement the YSB effort.

Art and Craft Venues. The topic of Yurok arts and crafts and the related opportunities to sell these items to YSB visitors has been repeatedly mentioned throughout the YSB planning process. While initial venues may be associated with a Yurok Visitor and Cultural Center, we anticipate that once a market is established additional arts entrepreneurs may be encouraged to create individual art and crafts ventures such as galleries, studios, and/or dedicated web sites.

4.0 YUROK SCENIC BYWAY PROGRAM INVESTMENT AND DEVELOPMENT SCENARIOS

The Yurok Scenic Byway is envisioned as key component for the development of a significant public destination area along the proposed transportation routes and the surrounding landscape. This section outlines three basic investment scenarios: *Promoting the Byway*, *Restoring Connections*, and *Reinvesting in Our Heritage*. Within each scenario, the investment and programs listed will be designed and programmed with a common vision linking the Yurok Scenic Byway, with visitor-related facilities, educational resources, and interpretive programs the Yurok Tribe will offer to the public. The Yurok Scenic Byway Program scenarios are presented as a cumulative progression of investment, and intended to be realized over time, beginning with designation and promotion of the YSB region. For the purpose of assessing the range and magnitude of economic impacts, each scenario is considered as building on the elements of the previous.

From a visitor perspective, the Yurok Scenic Byway Program along with the associated investments is envisioned as a “unified whole” to reinforce the sense that they have arrived at a welcoming destination area with the Yurok Ancestral Territory. For the visitor, this is an issue of *perception* not of operation. One of the most important elements in the success of creating this perception will be with the success of construction and design of the Yurok Scenic Byway Visitor Center and the implementation of guided trail hikes.

Scenario I – Promoting the Byway

This is the basic level of improvement assumed for meeting visitor needs and promoting the YSB.

- Proposed hotel (50-60 rooms) with small restaurant
- Bald Hills Road Improvements (includes signage and restrooms)
- YSB Visitor Center with tourist/transit info
- Add Yurok interpretive elements at existing National/State Park Visitor Centers on SR 101
- Guided trail hikes featuring natural/cultural resource interpretation
- Tourist/interpretive information center at Weitchpec
- Implementation of Tier 1 Interpretive Plan elements
- Widen SR169 (North) from Klamath to Klamath Glen for safe walking/biking access
- Secure day parking for tourists taking river, land, hiking, biking excursions
- Safety improvements on SR 169 (south)

Scenario II – Restoring Connections

Includes all Scenario I components, plus:

- Integrated River Transportation System, aka the “Klamath River Experience” which would provide transit services as well as:
 - For ferrying across the river for special events,
 - To an intermediate destination where tourists will get off and have an “on-shore experience” ,
 - For shuttling paddlers/campers,
 - To transport goods,
 - For potential school activity transportation, or
 - For charter fishing tours and other services
- Implementation of Tier 2 Interpretive Plan elements
- Rafting shuttle services
- Regional trail connections to RNP from Yurok Reservation
- Visitor Shuttles/Excursions operated out of Klamath area heading North and South along SR 101
- Implement multiuse trails for pedestrians and bicycles along SR 101 from Requa Road to south side of bridge, including separated travel lane on bridge
- Estuary Boat Tour with interpretation
- Park-n-Ride station between Pecwan and Kotep for river transit
- Klamath Transit Center

Scenario III – Reinvesting In Our Heritage

Includes all Scenario I and II components, plus:

- Yurok Working Culture Village on the Klamath River
- Implementation of Tier 3 Interpretive Plan elements
- River Tours featuring guided natural/cultural resource interpretation
- Guided overnight trail hikes featuring natural/cultural resource interpretation
- Additional lodging upriver
- Restaurant (in addition to one at hotel/casino; further upriver as a destination)
- Designated camping sites
- Multiuse path along Klamath River from Wautek to Klamath Glen (e.g., where paved road is missing) for pedestrians/bicycles
- Lodging/dining at Weitchpec

5.0 YUROK SCENIC BYWAY ECONOMIC IMPACTS

5.1 Economic Impacts

Visitors to the Yurok Ancestral Territory will generate economic benefits for the Yurok Tribe and throughout the region, as the proposed Yurok Scenic Byway interpretation efforts and recreation opportunities generate more day and overnight travel. This section describes the projected economic impacts for the Yurok Scenic Byway during the initial years once the Yurok Scenic Byway is established and marketed, and the associated visitor facilities and investments are fully implemented. Additional visitor expenditures such as purchases made for lodging, dining, retail and artisan craft items, recreation services (e.g., guided tours), as well as gasoline and other transportation-related costs would generate the projected economic impacts.

For Yurok Scenic Byway planning purposes, the analysis assumes additional visitation (in terms of travel party days) will occur, within each scenario, as a direct result of development of the Yurok Scenic Byway, and in coordination with the proposed visitor facilities, recommended interpretation plan, as well as regionally integrated marketing efforts. Visitor expenditures, and the associated economic impacts, are based on estimates of average daily spending per party by type of travel party (i.e., hotel/motel, campground, or day visitor). While these projections are presented in terms of Yurok Scenic Byway related impacts, they are also projected to occur within the overall pattern of leisure travel in the region, mostly orientated to the summer season, and with a primary focus on visitation to Redwood National and State Parks.

Additional travel party days generated by the Yurok Scenic Byway will translate into new travel spending, employment, and earnings for the Yurok Tribe and the region's local economies. Development of the Yurok Scenic Byway combined with the associated investments, as outlined in the previously described investment scenarios, would attract approximately 20,000 – 29,000 additional “travel party days” each year to the region – defined as the Yurok Ancestral Territory. This estimate of additional travel party days represents the extent to which a travel party -- represented by 2.7 persons per vehicle for visitors to Redwoods National Park (April-October) -- will spend additional time, overnight stays and additional day trips, while traveling to and through the region.

Average Daily Visitor Spending

Average daily visitor spending is used to represent expenses made within the region. Spending averages for each type of travel party were derived from park visitor surveys at selected parks over the past ten years. Bureau of Labor Statistics price indices for each spending category are applied to adjust spending to 2012 dollars.

As shown in Table 5.1-1 below, visitors who stay overnight in hotels, motels, and B&Bs (outside the national park) spend on average \$262 (per travel party per night). Day visitors from outside the region, those who travel at least 50 miles (one way), spend nearly \$70 per day. Estimates of average daily spending for overnight and day visitors to the National Park are shown below.

Table 5.1-1: National Park Visitor Spending in the Local Area by Segment, 2012
(\$ per party per night/day)

Spending Category	Hotel/Motel -- Outside Park	Campground -- Outside Park	Campground -- NPS	Non-local Day Trip
Hotel, Motel, Cabin or B&B	104.82	0.16	0.83	0.00
Camping Fees	0.24	25.33	18.09	0.00
Restaurants & Bars	62.45	16.56	13.86	19.39
Recreation & Entertain.	20.62	15.21	9.99	9.25
Grocery Stores	15.29	12.63	16.32	6.86
Gas Stations	22.60	23.82	24.59	18.97
Local Transportation	9.19	2.12	4.42	1.97
Retail Purchases	27.21	19.69	13.27	13.16
Total	262.42	115.52	101.37	69.60

Source: National Park Service, U.S. Department of Interior

Economic Impact Scenarios

The Yurok Scenic Byway and associated development will generate additional travel spending, in the form of business receipts, within the local communities. Portions of these receipts will then be spent within the local communities for labor and supplies. Employees of these businesses will, in turn, spend a portion of their earnings on local goods and services, as well. This re-spending of travel-related revenues creates secondary (indirect and induced) impacts.

To summarize:

- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses along the Yurok Scenic Byway.
- **Secondary (Indirect)** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (i.e., those that receive money directly from travelers).
- **Secondary (Induced)** impacts represent the employment and earnings that result from purchases for food, housing, transportation, recreation, and other goods and services made by travel industry employees, and the employees of the indirectly affected industries.

The IMPLAN Software & Data modeling system was used to estimate how direct visitor spending would affect the region in terms of employment, earnings, and secondary economic impacts.

Table 5.1-2 below shows breakouts, for each of the three development scenarios, of how these travel-related economic impacts are most likely to be distributed among the primary visitor-related industries, and the associated employment and earnings estimated to occur within the region. It should be noted that the economic impacts are project to occur entirely within region, known as the Yurok Ancestral Territory, and predominantly within close proximity to the U.S. Highway 101 corridor of the proposed Yurok Scenic Byway.

Under *Scenario III – Reinvesting in Our Heritage*, development of the Yurok Scenic Byway would attract approximately 29,000 additional travel party days (a figure that represents nearly 20 percent of the total travel party days to Redwood NP). This estimate of additional travel party days reflects the potential for more of the visitors traveling to and through the region along the U.S. Highway 101 corridor to spend additional time (resulting in additional overnight stays) and additional day trips made by residents from outside the region, most notably residents of living in the Eureka/Arcata area.

With successful development of the proposed Yurok Scenic Byway (*Scenario III – Reinvesting in Our Heritage*), visitors are projected to spend nearly \$5.4 million more per year throughout the region. The associated wage and salary disbursements and proprietor income of business owners who work in travel-related businesses would generate an additional \$1.2 million in earnings and support 80 new jobs (also reflects both part-time and seasonal jobs -- an employed person may hold more than one part-time or seasonal job), which translates into additional economic activity and revenue for Yurok Tribe and the region's local communities.

Comparable economic impact estimates made by the National Park Service (*see Economic Benefits to Local Communities from National Park Visitation and Payroll, 2010*) show all visitors to Redwood National Park spent approximately \$20.7 million in the local economy, generating 268 direct jobs with labor income (earnings) of nearly \$6.6 million.

Table 5.1-2: Yurok Scenic Byway Economic Impact Scenarios

Scenario I -- Promoting the Byway			
Projected Visitation (additional travel party days): 19,500			
	Sales (\$)	Employment (Jobs)	Earnings (\$)
Direct Impact			
Hotel, Motel, Cabin or B&B	1,239,700	12	220,740
Campgrounds	81,600	1	20,385
Restaurants & Bars	877,200	15	262,581
Recreation & Interpretation	733,600	16	22,646
Grocery Stores	251,700	1	33,358
Gas Stations	552,300	1	29,368
Artisan and other retail sales	443,300	4	33,870
Total Direct Impacts	4,179,400	51	622,948
Secondary Impacts	1,301,094	11	326,707
Total Economic Impacts	5,480,494	62	949,655

Scenario II -- Restoring Connections			
Projected Visitation (additional travel party days): 23,800			
	Sales (\$)	Employment (Jobs)	Earnings (\$)
Direct Impacts			
Hotel, Motel, Cabin or B&B	1,281,700	13	228,219
Campgrounds	122,400	2	30,578
Restaurants & Bars	973,300	17	291,347
Recreation & Interpretation	787,500	17	24,309
Grocery Stores	293,700	1	38,925
Gas Stations	654,700	1	34,813
Artisan and other retail sales	516,000	5	39,451
Total Direct Impacts	4,629,300	56	687,642
Secondary Impacts	1,425,649	12	358,306
Total Economic Impacts	6,054,949	68	1,045,948

Scenario III -- Reinvesting in Our Heritage			
Projected Visitation (additional travel party days): 29,000			
	Sales (\$)	Employment (Jobs)	Earnings (\$)
Direct Impacts			
Hotel, Motel, Cabin or B&B	1,523,400	15	271,255
Campgrounds	165,700	2	41,395
Restaurants & Bars	1,168,200	20	349,688
Recreation & Interpretation	871,900	19	26,915
Grocery Stores	332,700	2	47,539
Gas Stations	743,000	1	42,386
Artisan and other retail sales	581,600	6	47,999
Total Direct Impacts	5,386,500	66	827,178
Secondary Impacts	1,696,038	14	426,963
Total Economic Impacts	7,082,538	80	1,254,141

Source: Dean Runyan Associates

6.0 CONCLUSIONS AND OBSERVATIONS

As a result of this tourism assessment and economic impact review, we have identified several primary findings that provide context for the economic impacts that could accrue to the YAT region as a result of the YSB program.

Market demand conditions are positive. Demand for outdoor recreation and cultural and heritage destinations appears stable, even with the continuing economic challenges of 2012. Given a static supply and presumed future economic expansion, the YSB possesses the attributes that can attract additional travelers. In addition, the California in-state travel population is enormous and the state itself serves as a destination for travelers from around the country and in fact, for visitors from around the world. Accordingly, the YSB is well-positioned to accrue economic benefits for the Yurok Tribe and its members.

Challenges remain. The twin challenges of a remote location and a short visitor season will continue to provide challenges for developing a sustainable destination. Planning, development, and marketing efforts at the highest level of integration and implementation will likely be required if significant numbers of visitors are to be enticed to make the travel investment. Likewise, sustaining employment and associated overall economic impacts may require efforts to at least somewhat extend the travel season beyond the summer peak pattern.

A fully integrated approach. When reviewing other Indian scenic byway programs we discovered that integrating all elements of tourism development under the banner of the YSB may provide the best opportunity to develop the YAT as a prosperous visitor destination. Each development proposal and its associated planning, management, and marketing may need full integration from start to finish to meeting the program's fullest potential. Lodging properties for example might be most effective if planners utilize cultural interpretive motifs; likewise interpretive programming such as facilities and guide services will be most effective if the hospitality sector is brought into the conversation and lodging opportunities are integrated into program development and marketing.

A next step that may be undertaken and which could directly apply this integrated approach would be development of a YSB Marketing Plan. A YSB Marketing Plan would incorporate all elements of the Yurok tourism development effort including specific YSB features, address how to attract visitors to and within the YSB, and outline how each element may be marketed including a full set of communication and direct marketing strategies.

Long-term sustainable effort. It is critical to note that the overall integration of marketing, facility and product development, and management will require a long term sustainable effort. Building a recognizable brand and developing an effective market position within the highly

competitive destination travel market requires time and ongoing commitment to a tourism development program including both funding and staffing. Simply put, a long term program that supports an integrated tourism development approach provides the greatest return on investment for the amount of available Yurok Tribe resources; by consistently developing and marketing the YSB as a combined destination, the Tribe may in effect create a compelling aggregated recreation and cultural and heritage resort destination.

Substantial economic impacts. Given the rural nature of the YAT area and specifically the YSB region, the potential economic impacts are considerable. The added 29,000 visitor party days, \$7.1 million in expenditures and associated 80 jobs represents a 25 percent increase in visitor spending over the current level now generated by visitors to Redwood National Park. If these numbers were translated into a manufacturing facility or hi-tech firm they would certainly attract front page attention. Of course the challenges are not insubstantial, but with a focused effort we believe that the described impacts via the YSB can directly enhance the Yurok Tribe and the local area economy.

References

Buckley, Thomas. *Standing Ground: Yurok Indian Spirituality, 1850-1990*. University of California Press, 2002.

California Department of Boating and Waterways, *Non-Motorized Boating in California*, 2009.

California State Parks, *California Outdoor Recreation Plan*. 2008

California State Parks, *Survey on Public Opinions and Attitudes on Outdoor Recreation in California*. 2009

Chuck Nozicka Consulting, *Lake Tahoe Non-Motorized Boating Study*. 2009

Outdoor Industry Foundation, *The Active Outdoor Recreation Economy*. 2006

Outdoor Industry Foundation, *A Special Report on Paddlesports*. 2009

Outdoor Industry Foundation, *Outdoor Recreation Participation Topline Report*. 2009

USDA Forest Service, *National Survey on Recreation and the Environment, Recreation and Tourism Statistic Update*, Klamath National Forest. 2004.

USDA Forest Service, *National Survey on Recreation and the Environment, Recreation and Tourism Statistic Update*, Trinity National Forest. 2006.