

SEAFOOD DIRECT MARKET PLANNING STUDY



3/31/2011

CBJ - Juneau Docks & Harbors Department

Our objective is to develop a coherent approach to help fishermen direct market their catch to the Juneau public; to help improve access for area residents and visitors to high quality, "right off the boat", locally caught Alaskan seafood.



Alaska Fisheries Development Foundation, Inc.

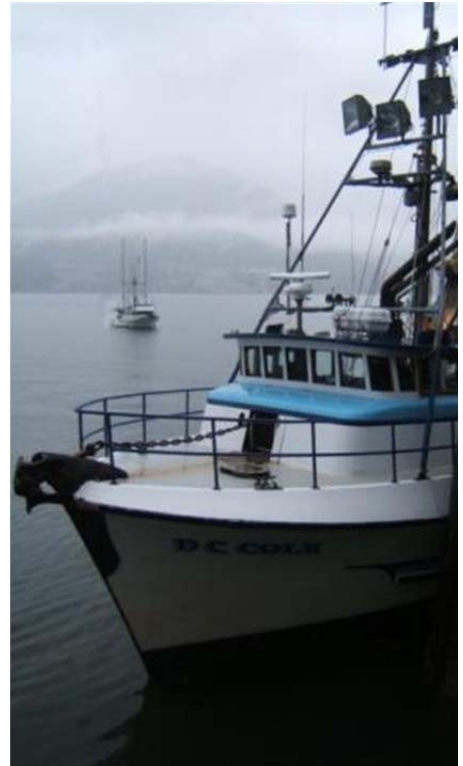
This study was made possible by a grant from AFDF.

Seafood Direct Market Planning Study

CBJ - JUNEAU DOCKS & HARBORS DEPARTMENT

TABLE OF CONTENTS

1. Introduction
 2. Background
 3. Direct Marketer Survey
 4. Criteria for Direct Market Facility
 5. Potential Locations
 6. Downtown Harbors Overview
 7. Evaluation of Each Harbor Site
 8. Process, Comments Received
 9. Public Involvement
 10. Effective Signage Ideas
 11. Connection to Local Markets
 12. Summary
 13. Next Steps
- Appendix:
- Regulations, References
 - Fisheries Direct Marketing Survey
 - Survey Results Tabulation



1 – INTRODUCTION

In September of 2010 the City and Borough of Juneau (CBJ) Docks and Harbors Department was awarded a grant from the Alaska Fisheries Development Foundation (AFDF) to perform a planning study to determine the need and feasibility of developing a direct market fish sales facility. The objective of the project is to develop a coherent approach to helping fishermen direct market salmon and other seafood species to the general public. The overall goal is to improve access for Juneau residents and visitors to high quality “right off the boat” locally caught Alaskan seafood.

Participants in the planning process included the following:

- NorthWind Architects: Gerald Gotschall, AIA and James Bibb, AIA
- PND Engineers: Dick Summerville, PE and Andrew Schicht, PE
- Juneau Docks & Harbors: Gary Gillette, AIA Port Engineer.
- Greg Fisk, local fisheries advocate/enthusiast



NorthWind
Architects, LLC



2 – BACKGROUND

For many years there have been discussions of providing area salmon fishermen with improved facilities from which to sell their product direct to the public. Juneau represents the largest market in Southeast Alaska, with some 30,000 residents. This represents a substantial opportunity for fishermen to sell direct for local consumption. Many locals have also expressed interest in purchasing fish directly from fishermen to ship to relatives and friends in the Lower '48. We also receive more than 1 million visitors each year. If a fishermen's direct marketing location becomes well established, it could become an attraction for some of those visitors, and therefore adding additional direct market opportunities for the fishermen. There is already a certain amount of direct sales taking place off vessels in our harbors. However, there are problems with lack of dedicated spaces and facilities, and poor communication / advertising with the potential buying public. Typically, fishermen put up "jury rigged" cardboard signs on the highway near harbor facilities to direct customers to their sales location.

This study is a first step in understanding how the community can aid in making the connection between the seafood fishers and the buying public. It is an opportunity to not only increase higher value retail sales of seafood for the fishermen, but also enhance community awareness of the local fisheries through better access to top quality, locally harvested seafood.

3 – DIRECT MARKETER SURVEY

- Developed survey.
- Obtained list of direct marketers registered in Southeast Alaska.
- Worked with fisheries consultant to develop questions.
- Survey distributed by mail with return envelope.
- Summary of direct marketer types.

In conjunction with a local fisheries consultant, Greg Fisk, a list of questions was developed for the survey that sought to gain insight into how the direct market operations are presently working here in Juneau and how they might be improved.

The survey was mailed out to our target group consisting of all direct market fishermen in southeast Alaska that are registered with the Alaska Department of Fish & Game (ADF&G). Surveys were distributed with



stamped return envelopes to encourage participants to return the surveys. We were encouraged to receive over 1/3 of the surveys back over a two month period.

A summary of this target group was provided by Greg Fisk as a very active member of the Alaskan fisheries community:

The list of direct marketers was generated from a data list generated in December 2010 from the Alaska Department of Fish & Game (ADF&G) with the names and addresses of all the licensed fishermen who are direct marketers in the Juneau area, including Juneau, Douglas and Auke Bay, as well as in nearby communities (Gustavus, Haines, Hoonah, Skagway and Tenakee). 112 individuals in all - 68 in Juneau, 5 in Gustavus, 24 in Haines, 8 in Hoonah, 2 in Skagway and 5 in Tenakee.

There are three classes of licenses - Catcher Processor (CAPR), Direct Marketer (DMCP), and Catcher Seller (CASO). Catcher Sellers are by far the most common (74). Catcher Sellers are essentially restricted to only sell off their vessels. I say essentially, because there is an exception if selling to a buyer (ie a grocery store or a restaurant) if that buyer has a DEC approved waiver. Also, there is some gray area as to whether a Catcher seller can deliver product to somebody so long as the sale is concluded at the boat. In the past a lot of Catcher Sellers got their permits (which are free) for the purpose of roe stripping.

There are 35 DMCPs and 3 CAPRs. I would lump these all together. All of these 38 operations are serious businesses that process at least minimally onboard - typically freezing, which is deemed to be processing.

Survey Results

The Survey was comprised of 2 pages with 11 questions. Of the 104 surveys mailed out, we received 35 back with all questions answered and some comments, both positive and negative. (A copy of the survey and the tabulation results are included in the Appendix.)

The Survey asked about type of seller permit, how active they were with direct sales, what type of seafood they are currently or planning to market, and if they would utilize a special area that might be set up to better facilitate their sales activities here in Juneau's harbor system. If provided with a dedicated direct market float, it was noted by the majority of the responders that they would use it to some extent.

The predominate species of seafood being sold were Salmon, Shrimp & Dungeness Crab. The primary sales seasons are Summer & Fall.

Of the four Juneau area harbors, Auke Bay's Statter Harbor was ranked first with the downtown Harris Harbor ranked next for a preferred use as a sales location. Many of the responders that were from out of town like Haines or Gustavus preferred an Auke Bay location.

Available or provided services at a direct market float – fresh water, power, cleaning table, covered customer areas – had a mixed response but appeared that if provided, they would be used. The availability of packing ice in the area as a service was not asked but may be important and should be considered in future planning.

The final main question asked about a usage fee. Although some (about 40%) indicated they would be willing to pay a fee, it was requested that it not be very much and possibly not more than a launch permit (currently under \$100). Others thought that it should be included with the stall fee. One specific request was to not make it any more difficult or costly to sell. Another comment noted that this is a good service to the community and that it should not cost more, especially if the fee is difficult to pass on to the customers. Generally, an additional float use fee is not preferred.



4 – CRITERIA FOR DIRECT MARKET FACILITY

A list of criteria was generated with which to evaluate the different locations identified for a Direct Marketing Facility.

Criteria

- **Access for the boats.** How convenient or difficult is it to get to the dock? Is there room to maneuver? How many boats will it accommodate (1-8) with an average length of 45' per boat? How close to the core slips is the dock?
- **Access for the Cars.** How many access points are there off of the Highway (Egan Drive) to conveniently gain access to the dock? Is there short term, non-permit-only parking nearby?
- **Visibility to Dock.** Are the selling boats or dock visible from the highway? Can motorists see the boats and decide to turn into the harbor? Is the dock visible from the parking or some upland area that would permit viewing or an overlook to the selling activities? Can the operations be watched by incidental passersby?
- **Visibility to Signage.** Can fish sales signage be seen at or near the dock from the highway? Can a sign be located out of the highway right-of-way and still allow motorists time to turn into the harbor area? Is it a fixed fish sign or a neon flashing fish sign?
- **What is the potential for adjacent or existing services?** Is there more than one reason to go to the dock area? Is there room on the uplands areas for future facilities or structures that may be used to support the fish sales activities on the boats? Is the direct sales activities conflicting with any existing activities?
- **What other activities** can be served by the dock area? Can the dock be used for net repair, sea plane float tie ups, loading or unloading?
- **Pedestrian access.** What is the available access by walking or biking to the site? Is it accessible for public to view or community/tourist/summer view to the dock activities?
- **Existing or new facility?** If it is an existing facility, can it be put into service immediately or will there need to be a funding, design & construction time-frame?
- **Direct market dock amenities.** What is needed or preferred at the direct market dock for amenities? Water, power, ice, cleaning table, covered waiting area?
- **Upland facilities.** Is a facility needed? Is there a typical "fish market" area? Or sheltered area? Tent or building?
- **Advantages.** What are the advantages of using the designated float in this location vs. selling out of an individual's assigned slip.

It is anticipated that this list of criteria will expand & evolve over time and also that it will be useful in evaluating other floats or dock areas in the area wide harbor system for use as fisheries direct sales areas.



5 – POTENTIAL LOCATIONS

The Juneau harbor system has a number of potential locations that might support a direct market fish sales facility including **Statter, Aurora, Harris, and Douglas Harbors**. All of these harbors currently host some level of direct market fish sales but each has various levels of supporting elements. In an effort to focus the scope of this project to a manageable level, a review of the various harbors was undertaken to select a harbor area that has the best potential for development of a dedicated direct market fish sales facility.

Statter Harbor is currently used for direct market fish sales with fishing vessels typically tying up at the older floats close by the main ramp. There are a limited number of free, short-term parking spaces in the immediate area but the bulk of the parking requires payment. The dock area adjacent to the ramp is heavily congested with harbor moorage users, commercial charter boat operations, and some local businesses in the area. The CBJ Docks and Harbors Department is currently in a planning effort that would significantly alter the use patterns when implemented. The direct market fish sales element should be addressed as part of this overall planning effort. For these reasons Statter Harbor was not considered for inclusion in this study.

Douglas Harbor currently features direct market fish sales but it is on a low level. Occasionally fishermen sell directly off their vessels typically at their moorage stalls. Because this is a very limited use, Douglas Harbor was not considered for inclusion in this study.

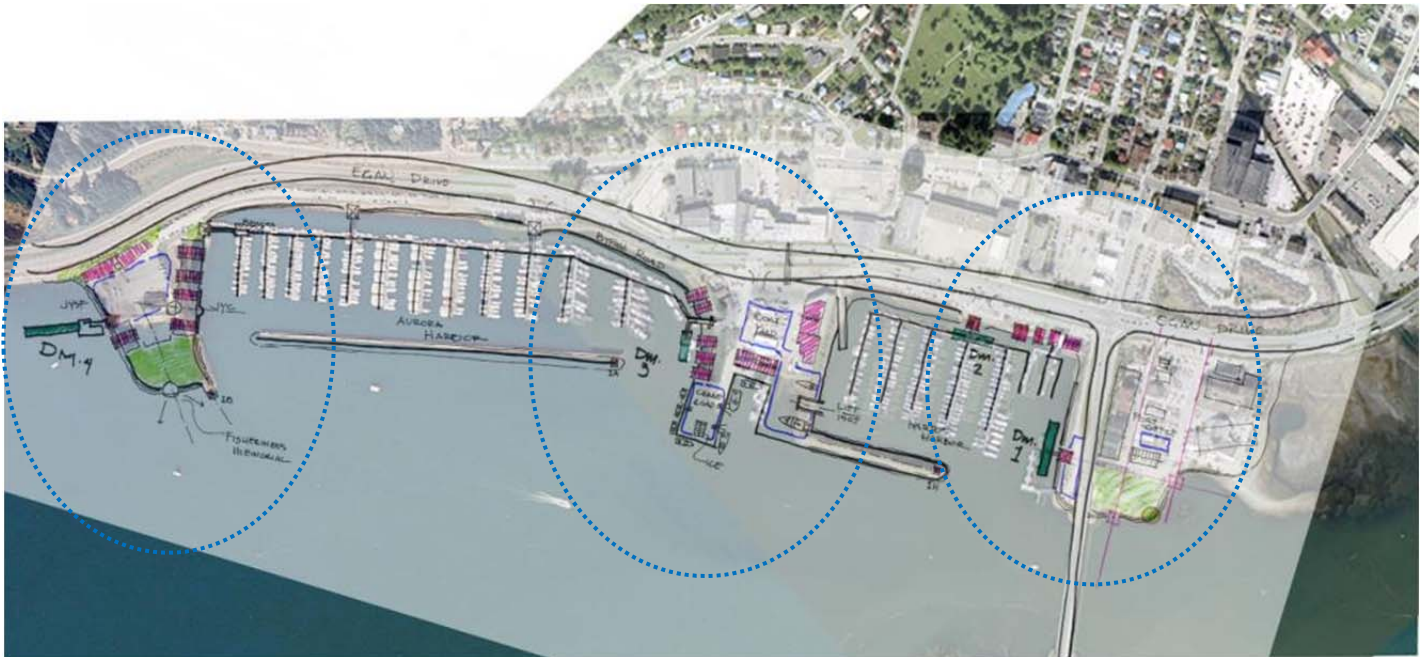
Based on the current situations at Statter and Douglas Harbors, it was determined that the focus of this study would be at Aurora and Harris Harbors. These two harbors are adjacent to each other and directly accessed from Egan Drive which is the main 4-lane thoroughfare connecting downtown Juneau and the Mendenhall Valley. The Aurora/Harris Harbor basin stretches from Norway Point at the north end, to the Juneau/Douglas Bridge at the south end. The following discussions focus on the Aurora/Harris Harbor basin for the planning effort of a direct market fish sales facility.



6 – DOWNTOWN HARBORS OVERVIEW

Harris & Aurora Harbors are the two primary downtown harbors that were considered for a direct marketing float. These harbors stretch from the Douglas Bridge and the proposed Bridge Park area north to Norway Point. The harbor master's office and a boat service/haul-out area are located between the two harbors along with a large University of Alaska Southeast vocational technology building. The two harbors and related CBJ uplands cover nearly 84 acres of land and water.

Douglas Harbor and the Intermediate Vessel Float in downtown play a minor role in the direct sales activities. Douglas Harbor occasionally has a vessel moored and selling from the dock. It appears more difficult to sign and direct customers to that more out of the way location. The IVF in downtown, rarely if ever sees boat sales at the dock. There is a fair amount of activity in the area with Taku Smokeries ice house & offloading facilities for commercial fish sales to the processing facility. Since this major fish processor is located adjacent to the IVF, direct sales is likely not preferred, but it is possible barring any CBJ preference or ordinance otherwise. The criteria could just as easily be applied or evaluated on both Douglas & the IVF float to see how they stand against the Harris/Aurora Harbor area.



- DM 1 – Bridge Park New Float
- DM 2 – Harris Harbor, Existing Float
- DM 3 – Aurora Harbor, Existing Float
- DM 4 – Norway Point, Existing Float



7 – EVALUATION OF EACH HARBOR SITE

DIRECT MARKET AREA-1: BRIDGE PARK



Bridge Park: This area requires a new float and possibly new upland wharf/deck-over along the shore, and a new gangway. The existing seaplane floats will be removed. This is a good location in that it will spark development of the soon to be reclaimed industrial usage area under the bridge and the planned development of a new park area. The park is the terminus node for the proposed seawalk trail that is a new pedestrian path & elevated walk along the channels edge, and is parallel to the highway. By having the direct marketing sales dock, it provides a destination and additional purpose to the other activities at the park to draw people to the area. The location at the top of the ramp could be tied into the overlaying grid patterns of the neighborhood/park development, tying it into the park & seawalk nodes.

A new, defined parking area can be constructed to facilitate close access to the direct market dock. It is preferred that roadways be through-streets to allow for multiple vehicular approaches to the new float. The highway access points for this site are on either side of the main Douglas Bridge roadway. **The success of this area will be greatly enhanced by having multiple, clear access points.** Fish sales signage can be incorporated into the highway access points as well as at the top of the gangway.

A review of the existing float area shows the deterioration of the float plane ramps with a smaller float off to the channel side that currently is occasionally used by commercial boats for net & rigging repair during the summer season. Float planes should still be allowed to side-tie when needed for loading and unloading, sizing of the dock and arrangement of piles should be taken into consideration during the design. If longer term float plane use is needed, as with overnight or multiday parking, then the planes will need to be on a



ramp and out of the water currents and away from boat traffic around the float. Currently there is minimal use of the float by planes; a search for a better location may be needed if the use increases.



View of existing float plane dock at the Douglas Bridge.

7A – MARINE FACILITY TECHNICAL REVIEW OF BRIDGE PARK SITE

PND Engineer's Civil Engineer Dick Somerville, P.E., reviewed the preliminary planning documents prepared by NorthWind Architects for a proposed multi-purpose floating dock located near the Gastineau Channel Bridge just inside the entrance to Harris Harbor. The site is currently occupied by a seaplane float and access gangway leading to shore. Water depths at the seaward face of the existing float range from -10' to -12' MLLW and -8' to -10' MLLW at the shoreside. Strong currents are reported in the vicinity of the easterly bridge abutment and harbor entrance.

The proposed facility is intended to serve several purposes. A brief design criteria narrative follows for each use. These criteria should be considered preliminary until additional planning effort ensues.

1. **Fishermen's Direct Marketing Float:** We understand the proposed facility may concurrently serve a fleet of 4-8 vessels ranging in length from 32' to 42'. We recommend a float 200' long with moorage on both sides to satisfy this fleet criterion. The width of the float will depend on the deck amenities desired and operational activities occurring on the float such as sales, storage, spectator interests, interior piles, lighting, utilities and safety equipment. A minimum width of 12' should be provided however, if the visiting public finds the facility popular, we recommend 16' width. Piles should be placed inboard of the float structure to allow vessel berthing full length. Pile spacing will be approximately 30' on center.

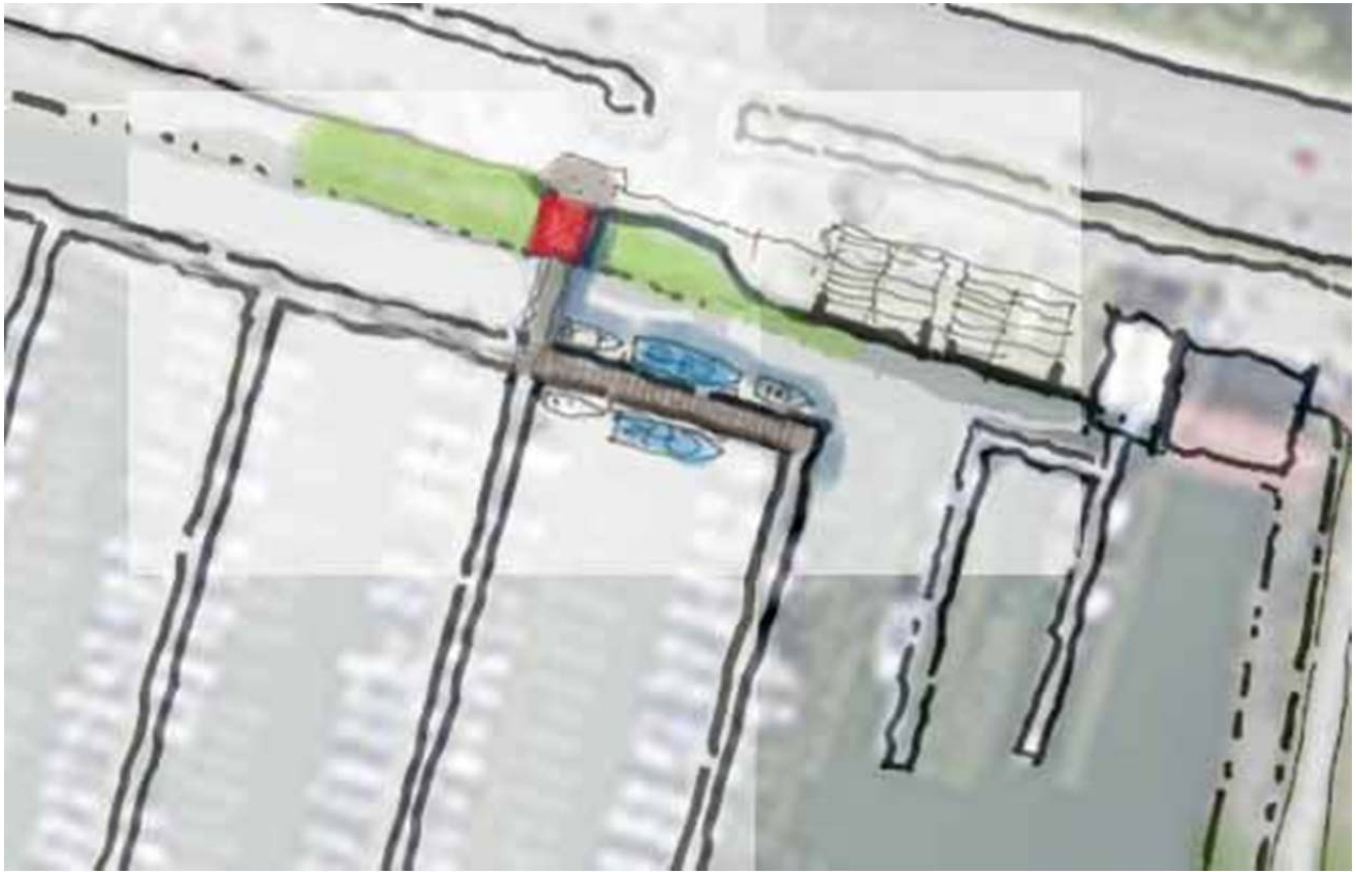


2. Seaplane Float: Seaplanes currently utilize the existing ramped float facility especially during the winter when the JIA airport float plane pond is frozen over. Seaplanes currently pull up and onto the ramped float for secure overnight moorage. Should ramped moorage still be desired for this facility, then roughly 50' of floating moorage should be planned for each pair of opposing seaplane berths. If side tie transient moorage is acceptable for the seaplanes, then piles must be located to clear the wing tips. Approximately 25' should be planned for wing clearance and this may be possible at the ends of the proposed direct marketing float described above.
3. Gillnet Repair Float: Ideally a gillnetter needing to repair nets would have a moorage configuration that would allow the vessel to offload and load nets directly from the drum. A small vessel float approximately 6'x40' could be centered at one end of a larger attached work float allowing two vessels to spool net at the same time. Under this configuration, a work float roughly 30'x60' may suffice. A larger work float would be required for more concurrent gillnet capacity or larger vessel operations such as seiners.
4. Gangway: Shore access should be provided by a gangway with minimum dimensions of 6'x80'. Longer and wider gangways are recommended if large visitor operations are anticipated or for ATV drivable access which may be found convenient for the transport of fish product to shore. Other means of light cargo handling may include an electrical winch system to tug a small dock cart up the gangway.

All other proposed floats are newer and existing. Minor improvements could be made to other floats for items such as a tug winch at the ramp, but otherwise the floats would serve as they are in their current configuration.



DIRECT MARKET AREA-2: HARRIS HARBOR



Harris Harbor: We have included this location as it is an existing, frequently used & popular sales location. However, the current “loading area” that is used is only 65-feet long between boats x 12’ wide, and is only accessible on the water side as there is minimal draft & maneuvering clearances on the land side of the dock. Therefore, due to the tidal variation and shallow water depths, it is really only useful on the outer side of the float. The anchoring pilings are also outboard of the dock on the back side of the float and do not allow for good moorage on that side.

Although not always clearly visible or evident, sales often occur from an individual boat moored at their assigned slip within Harris harbor. This method can work and allows the boat to be in a familiar location, but it is more of a challenge for the customers to find a boat that is not visible from the top of the ramp, or in a regular/familiar location.

Parking for this area could be reconfigured slightly to allow for short term parking directly at the top of the gangway to allow for visual connection and loading of the fresh seafood purchases in to customers’ vehicles.

Signage could be installed at the top of the ramp both to indicate that this is Harris Harbor and another sign or indicator that will announce that a vessel is in port and available for sales, and possibly announcing the type of seafood available.





Harris Harbor loading zone & sales area.



DIRECT MARKET AREA-3: AURORA HARBOR



Aurora Harbor: This existing float would accommodate four fishing boats, with access on either side. The float is 12'x73'. The gangway & float are both new and in excellent condition. There is potential for signage at the top of the ramp on the existing access ramp to announce that it is both Aurora Harbor and to indicate that seafood is available for sale. This area has good visibility from Egan Drive and good vehicle access at the parking lots adjacent to the Harbor Master's office building, in the regular harbor use parking stalls. A short term loading/parking zone could be created directly above the float to allow for visibility to the selling vessel on the float. There is potential for future upland services/ facilities expansion that would support and enhance the direct market seafood sales in this area. There is fresh water and electrical power service to this float. The location for the boats is central to the harbors, and adjacent to the current ice supply source.

A downside to the use of this float for direct marketing sales is that it is currently heavily used by the Nordic Tug Charters vender and is a key component in their charter loading & maintenance operations during the summer months. During the winter months, four of the charter vessels are moored at this float.



DIRECT MARKET AREA-4: NORWAY POINT

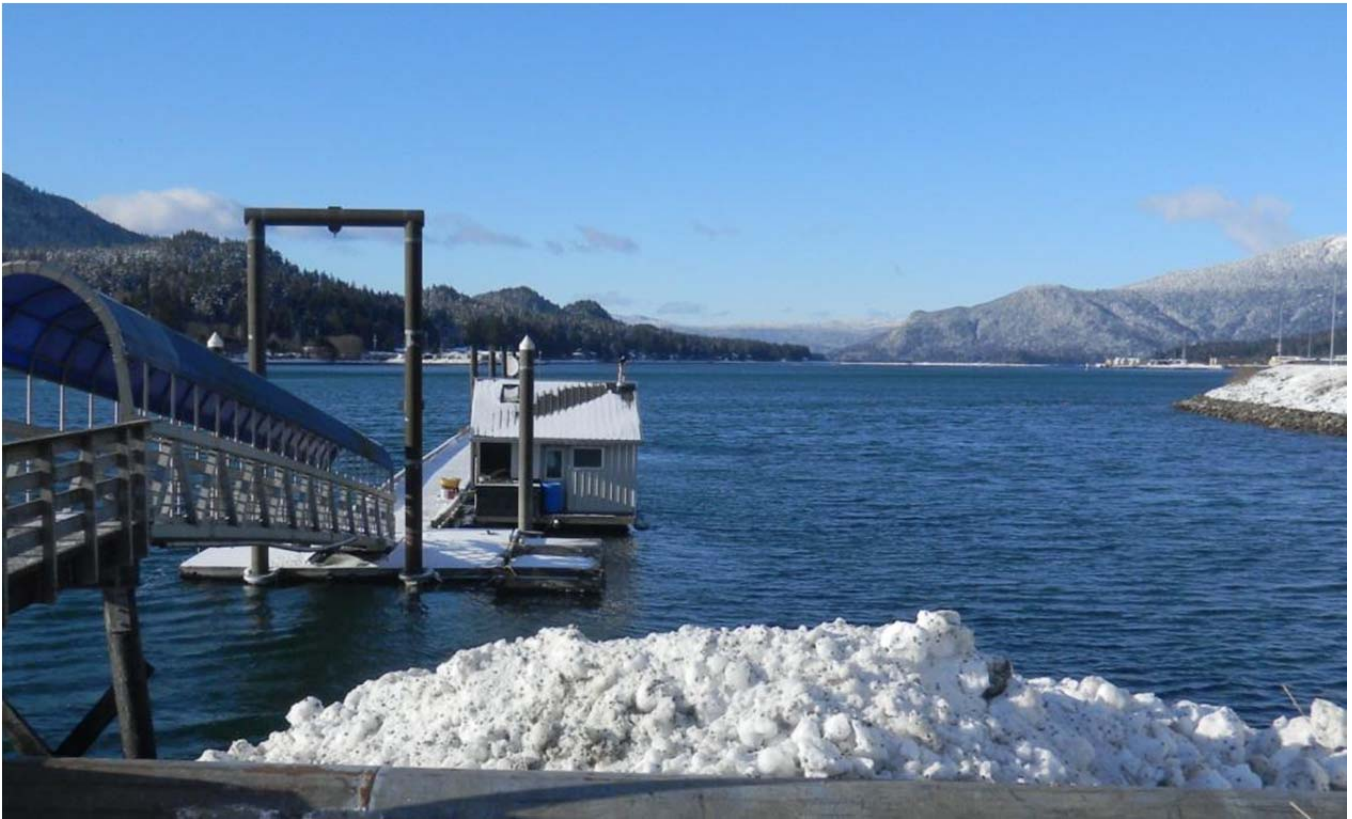


Norway Point: This is an existing float with moderate to good visibility from Egan Drive in the inbound lanes. There is an opportunity for advertisement and signage at the top of the ramp. The float is in new to excellent condition. It is a 10'x210' wood float installed within the past 10 years. A key advantage for this location is that it is an existing and underutilized float, and could be put into service immediately as the temporarily designated direct marketing float. There are only a few boats that use this float during the summer season and 1-2 houseboats that use it during the winter.

The summer usage by the Juneau Youth Sailing classes & boating activities are located to the end nearest the gangway and are typically out of the way of the main float traffic. There is plenty of parking, and sales activities are visible from the top of the ramp and parking lot. Parking is not restricted. Seafood sales activities would not conflict with any other activities on the float. This float would accommodate up to eight fishing vessels.

There is no water or electricity to this float at present. This float is furthest from the core of the harbors for fishing vessel access and is out of the way for vehicle or pedestrian traffic; however, not impossible to access. The community is familiar with this location from its proximity to Aurora Harbor and the Juneau Yacht Club building.





View of Norway Point Ramp & Float



8 – PROCESS, COMMENTS RECEIVED

Several in-house meetings and charrettes - intense design & planning sessions - were held with Docks & Harbors staff, PND Engineers, and local fish marketing enthusiasts, at the NorthWind Architects design studio.

The most numerous comments on the development of the direct marketing areas were received in the written comments on the Seafood Direct Marketer Survey. A mix of positive & negative comments was received. The full results of that survey are detailed later in this report.

In conjunction with an adjacent project, the Bridge Park & Sea walk planning project, a site visit to the future Bridge Park area was organized by CBJ Parks & Recreation and was well attended. In attendance were representatives from the Juneau Economic Development Council, Juneau Fisheries Development Committee, Alaska Dept. of Fish & Game, Juneau Docks & Harbors and several of their board members, NorthWind Architects, and the CBJ Engineering and Parks & Recreation Departments to speak and lead the tour. A summary of their desires and design work to-date in the area was explained.

9 – PUBLIC INVOLVEMENT

In an effort to gather public input NorthWind Architects and CBJ Docks and Harbors staff presented the project and draft report to the Harbor Board CIP and Planning Committee at their regular meeting on February 17, 2011. The Juneau Fisheries Development Committee was invited and a representative attended the meeting.

Juneau Economic Development Council representatives were also invited to comment on the ongoing planning process and participate in the planning discussions. Comments received were incorporated and addressed in the final draft.

The final draft report and an updated presentation was made to the Harbor Board CIP and Planning Committee at their regular meeting on March 24, 2011. Members of the Juneau Fisheries Development Committee and the Juneau Economic Development Council were in attendance.

At its regular public meeting of March 31, 2011 the Harbor Board reviewed the final draft and approved it for submittal to the Alaska Fisheries Development Foundation as the product of the grant.



10 – EFFECTIVE SIGNAGE IDEAS

Effective signage will be a key aspect of notifying & luring potential customers to the boats.

Currently, makeshift signage is taped precariously to light poles and signposts along the main highways and at major intersections.

Signs have been attached to parked vehicles in a roadside parking lot to announce the presence of seafood currently available at one harbor or another. We would recommend a more permanent & effective solution that would indicate the presence of vessels selling at a designated float and possibly what type of seafood they may have available. Some signage at the top of a ramp could indicate where the boat is moored if not at the loading or designated sales area.

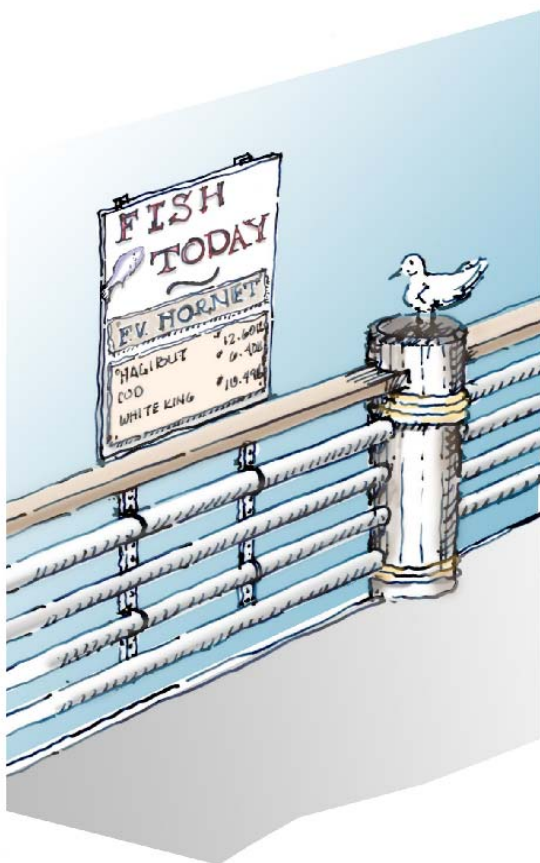
Improved Signage Suggestions: There are several different levels of improvements or signage options that could be created that would help guide the buyers to the boats.

Signs could be as **simple** as a preprinted sign that mounted to guardrails of the seawalk between downtown and the harbors. These signs could have the boat name & harbor location along with the type of seafood available.

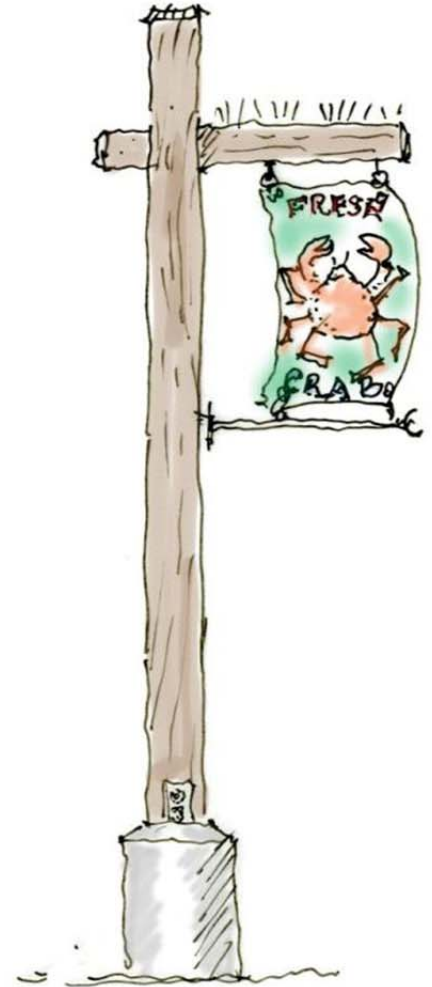


Existing haphazard signage >

< Rail mounted sign



The **second** level would be to install signs in several places at the harbor that would be visible from the roadway. These signs could be in character with other signs in town and would draw attention to the fact that the harbor is a location for “fresh from the boat” fish sales. A set of 3-5 signs could be installed in a series and would have fabric banners attached with various seafood symbols. A secondary sign could be attached and detached that indicated “Fish Today”.



A **third** and more permanent level of signage might include a more substantial iconic structure at the top of the ramp to the designated fish sales float. An example might be as shown above and might be combined with the main harbor sign.

Examples from other communities we have seen have used a narrow tower sign with some fashion of illumination. A series of these signs could be installed along the highway, but outboard of the highway right-of-way.

A common location and format is desired.

Different icons for salmon, crab, or shrimp may be used to indicate types of seafood available.



A series of signs that can be turned on when a boat is selling would aid in drawing attention to the sales float.

There are examples of illuminated towers at dock side locations in other communities that are used in similar fashions. A simple neon or LED illuminated sign could be placed at the head to of the gangway, or along the harbors to unify the area.



11– CONNECTION TO LOCAL MARKETS

Another avenue for the sales of seafood to the Juneau area customers is through the seasonal public or Saturday markets. Currently, these markets are held only occasionally and are small in scale, unlike the much larger and familiar example in Seattle’s Pike Street market area.

Juneau’s new **Maritime Festival** is held in May and was a success in 2010, its first year. There was a mix of maritime related booths and vendors. The theme as presented by the primary organizer, the Juneau Economic Development Council (JEDC), is to support and celebrate our “Maritime History, Culture, and Commerce.” Although early in the season, this is a venue that could, if nothing else, introduce the direct marketers to the public.

The **Saturday Market** is held in November for 3 days just after Thanksgiving. At this market there has been only a single vendor selling ocean-frozen prawns.

A **Farmers Market** is held in August and is usually just a single day of fresh & locally grown produce or seafood.

In addition to seafood caught by fishing vessels in and around Juneau, there are sources in outlying communities that harvest seafood such as oysters that could be brought to public seafood markets when they occur. Through these partnerships with other communities, the variety of seafood offered at an event could be expanded.

Although we may be a long way from being able to support or operate a daily public farmers market similar to that found in Seattle, there may be ways to enhance what is being done with the local grocery stores to let locals know that they have a variety of fresh, locally harvested seafood available for sale.



The use of a tent or seasonal facility selling fresh seafood along the waterfront does not exist at present. If desired, it would require much more infrastructure & labor to operate. It is quite a step to advance from selling the products off the boat - out of the hold & into a bag - to selling out of a fully staffed facility with lights, power, water and ice similar to that found at a **Pike Street Public Market** type of facility. Permits change and become more expensive if this work is done by the fishermen themselves. A system like a coop or completely separate business may need to be set up to handle this type of operation.



For now, if we can accommodate and enhance the operations of the fishermen selling directly off the boats, we would be meeting our initial goal and improving the existing service to the community. From the survey, we saw that many of the responding persons anticipated starting or enhancing their direct market selling in the upcoming season.

An upland **dock area** could be used to set up fish & seafood sales tents, allowing the sales to expand off the boats if desired. This would allow vessels to offload fish and have it sold in a 'market' setting. This would depend on having a facility that can be permitted by DEC & what is allowed by other permits held by the fishermen. This adds another layer to the seafood sales program having an on-shore sales facility. No local fish market exists like this at present, but could be included in planning for future consideration as the seafood sales programs develops and new dock facility options are planned.

Seafood markets away from the boats.



12 – SUMMARY

In reading through the marketing reports, guidelines and informational training documents, direct market catching & selling appears to be a broad business. All of the manuals talk about the quality of the product, the gear used to catch & process, and what is required for the business end, branding or marketing end, but not how or where the exchange occurs.

For the fishermen, the ultimate connection to the customer is the point of sale where the product meets the customer at the dock.

For the City & Borough of Juneau Docks & Harbors Department, the organization who owns & operates the docks and controls the majority of the waterfront with a public connection, they are the ones that are providing that platform for these sales to occur. How can CBJ help? What can CBJ do to assist this growing corner of the market; to improve these connections to the water and the platforms for the boats to either sell or offload their product in a way that enhances the transaction?

This is what we have begun to develop here in this study. We have looked at the need and we have looked at the existing facilities and how they may or may not work to provide a platform for direct market sales.

13 – NEXT STEPS

Although, we have looked at what the possibilities are and what will be required to put one or more of these sites into operation, further exploration and solid planning will be needed to enhance the connection between consumer and the fishermen selling their products. A more in depth look should be taken at how signage and other area marketing might enhance the sales at the floats.

In the process of considering these sites, opportunities were found for long-range master planning concepts for the dock & uplands support areas around the downtown harbors.

Several next steps from here would include the following pursuits:

- Designate an interim location at one of the docks at which a direct market fisheries float can be operated. This would include the installation of top-of-ramp signage, road-side signage, a notification of a designated sales area, striping or labeling an area of the dock that indicates a loading/sales area.
- For the long term the Bridge Park area is the preferred site for a more substantial, permanent locations of a direct market fish sales facility. Planning & design for this future facility should begin in coordination with other harbor master planning efforts. The design should be integrated with Bridge Park & seawalk planning efforts as well. The park planners should take into consideration what potential benefits the new float may offer to them as well. Their plan should be integrated with the opportunities presented by the creation of the sales float.
- Further develop the Harris/Aurora/Norway Point area master planning ideas that were discovered over the course of the discussion on this project.



APPENDIX

Applicable Regulations and Direct Marketing References

Several documents were readily available that guide a potential direct marketer through the process of getting a permit to sell, and also to manage the business once it is up & running. The primary permit that was held by the folks that responded to the survey was a permit that restricted sales to the boat. Very few held permits to sell their products off boat or away from the dock.

In order to best accommodate the fishermen in their sales efforts, providing a formal location with enhanced signage, visibility and safe float accommodations would be to provide a common location where they can sell directly off the boat.

LINKS TO DOCUMENTS ON DIRECT MARKETING:

Fishermen's Direct Marketing Manual:

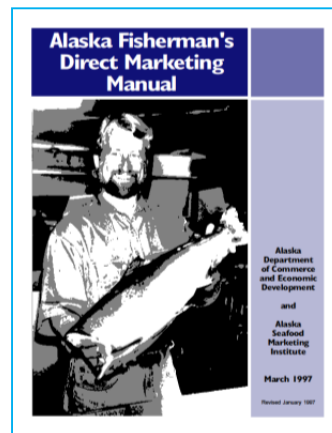
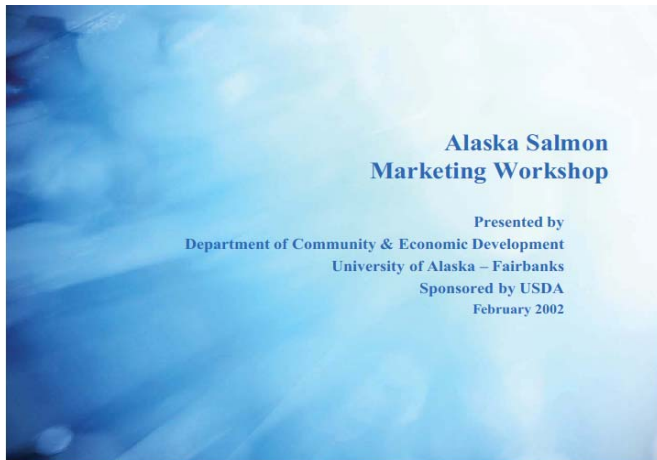
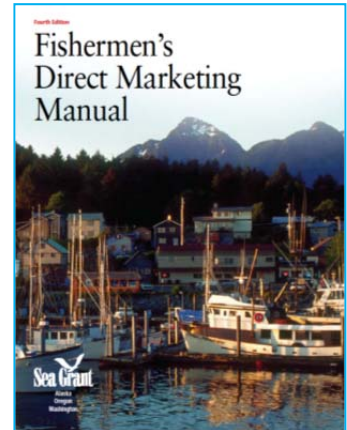
<http://seagrant.uaf.edu/bookstore/pubs/MAB-53.html>

Alaska Direct Marketing Fisheries application:

http://www.rndshops.com/eco_dev/Alaska_Direct_Marketing_Fisheries_Business_License.pdf

State of Alaska, Office of Fisheries Development:

<http://www.commerce.state.ak.us/ded/dev/seafood/seafoodmarketers.htm>



JUNEAU AREA FISHERIES - DIRECT MARKETING SURVEY

Dear Juneau Area Direct Marketer,

With a population of 30,000 people Juneau is the largest market in coastal Alaska where fishermen can interact directly with the buying public. Many fishermen already sell to the public within the **Juneau harbor system**. But, the situation is far from ideal. Jockeying for positions in loading zones with competing harbor uses... posting makeshift signs on the highway...selling from stalls that are a long walk from parking lots... *These things don't make your selling job easier, and discourage the buying public. We'd like to help!*

Now, with the help of a planning grant from the **Alaska Fisheries Development Foundation**, the *City and Borough of Juneau's Docks and Harbors Department* is investigating the idea of incorporating **dedicated facilities** in the harbor system where fishermen can sell direct to the public.

Your answers to a few questions can help us focus our efforts! Please complete the following questionnaire and mail it back to us (postage paid) as soon as you can.

Thanks for your help!

Name _____ Vessel Name _____
(optional) (optional)
Length _____

1.) What type of direct market license / permit do you have? (check all that apply)
 Catcher Seller Direct Market Vessel Other _____

2.) What is your status as a direct marketer?
 Permitted but not active – in the planning stage
 Direct marketing is just a sideline to my regular fishing activity
 Direct marketing is an important part of my fishing business

3.) What species do you direct market now, or plan to direct market in the future?

Salmon	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
Halibut	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
Dungeness crab	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
King crab	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
Shrimp	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
Other fish _____	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market
Other Shellfish _____	<input type="checkbox"/> Market now	<input type="checkbox"/> Planning to market

4.) Do you use the Juneau harbor system in your direct market activities?
 No
 Yes. I sell directly off my boat.
 Yes. I moor in Juneau, but conduct direct marketing activities away from my boat.

5.) If you sell off your boat, during what season(s) and how frequently do you do so?

Winter (Dec, Jan, Feb)	<input type="checkbox"/> every week	<input type="checkbox"/> few times per month	<input type="checkbox"/> seldom	<input type="checkbox"/> never
Spring (Mar, Apr, May)	<input type="checkbox"/> every week	<input type="checkbox"/> few times per month	<input type="checkbox"/> seldom	<input type="checkbox"/> never
Summer (Jun, Jul, Aug)	<input type="checkbox"/> every week	<input type="checkbox"/> few times per month	<input type="checkbox"/> seldom	<input type="checkbox"/> never
Fall (Sep, Oct, Nov)	<input type="checkbox"/> every week	<input type="checkbox"/> few times per month	<input type="checkbox"/> seldom	<input type="checkbox"/> never



6.) If Juneau created a dedicated direct marketing float, how likely is it that you would use the facility?

- Very likely Somewhat likely Not very likely I would not use it

If you answered "I would not use it" to Question 5, please move to the final item, number 10 and give us any additional comments you may have. Thanks.

If you are "Very likely", "Somewhat likely" or even "Not very likely" to use the facility, we would appreciate your answers to a few more questions.

7.) CBJ Docks and Harbors is analyzing several possible sites for a direct market facility. What is the best site from your perspective? Please rank the following options in order of favorability. (1 being most favorable)

- Auke Bay / Statter Harbor Aurora Harbor Harris Harbor Douglas Harbor
 Other _____

8.) Have you direct marketed in other communities? Yes No

If "yes" Have you had good or bad experiences with it? Are there good examples of docks or locations that worked particularly well, or particularly poorly? Please comment _____

9.) Are there dock accessories that would be handy?

- Cleaning tables very important somewhat important not important
Shore power very important somewhat important not important
City Water very important somewhat important not important
Customer covered area very important somewhat important not important
Other _____

10.) Would you pay a fee for use of a direct marketing facility? Yes No

If you answered "Yes" please give us your thoughts on a fair fee structure. If you answered "No", why do you think a user fee is not justified? _____

11.) If you have additional comments or ideas, please lets us know. _____

Place your completed survey in the self-addressed stamped envelope provided, and return it to us by January 30, 2011.

Thanks again for your help!

*If you would like to be kept **up to date** on this project, please provide your name & address: _____*



JUNEAU AREA FISHERIES - DIRECT MARKETING SURVEY

Updated: 2/22/2011

Results

0	Boat Length	<20-30	30-35	36-39	40-45	46-50+
		3 of 33	8 of 33	8 of 33	8 of 33	4 of 33

1	What type of direct market license / permit do you have?	
	Catcher Seller	17
	Direct Market Vessel	5
	Other	3
	Both	8

2	What is your status as a direct marketer?	
	Permitted but not active – in the planning stage	3
	Direct marketing is just a sideline to my regular fishing	13
	Direct marketing is an important part of my fishing business	14
	None	11

3	What species do you direct market now, or plan to direct market in the future?		
		Now	Planning
	Salmon	20	7
	Halibut	3	3
	Dungeness crab	6	3
	King crab	1	1
	Shrimp	5	4
	Other fish	0	2
	Other Shellfish	2	1

4	Do you use the Juneau harbor system in your direct market activities?	
	No.	13
	Yes. I sell directly off my boat.	17
	Yes. I moor in Juneau, but conduct direct marketing activities away from my boat.	7

5	If you sell off your boat, during what season(s) and how frequently do you do so?				
		Week	Month	Seldom	Never
	Winter	0	4	2	2
	Spring	1	5	2	2
	Summer	6	10	11	1
	Fall	1	9	14	1

6	If Juneau created a dedicated direct marketing float, how likely is it that you would use the facility?	
	Very Likely	12
	Somewhat likely	11
	Not very likely	8
	I would not use it	2

7	CBJ Docks and Harbors is analyzing several possible sites for a direct market facility. What is the best site from your perspective? Please rank the following options in order of	
	Auke Bay / Statter Harbor	20
	Aurora Harbor	3
	Harris Harbor	6
	Douglas Harbor	0
	Other	4

8	Have you direct marketed in other communities?	Yes	13
		No	20

If "yes" Have you had good or bad experiences with it? Are there good examples of docks or locations that worked particularly well, or particularly poorly?

9	Are there dock accessories that would be handy	Very	Some	Not
		Cleaning tables	12	6
	Shore power	14	9	9
	City Water	13	5	6
	Customer covered area	13	8	6
	Other	0	0	0
	None	7		

**Scale

10	Would you pay a fee for use of a direct marketing facility?	Yes	14
		No	17

If you answered "Yes" please give us your thoughts on a fair fee structure. If you answered "No", why do you think a user fee is not justified?

(Yes)

"A permit to operate fee should be required."

"Per day fee- may \$10.00 extra or \$25.00 per reservation."

"The same fee as we pay now on the transit dock."

"Based on length of vessel and time used is probably best. If based on dollar amount on product it will be avoided, too intrusive for most."

"This all depends! Harbor fees are very expensive now."

"It would depend on the amount of product processed, water usage, convenience for selling and amount of time facility would be tied up."

"One time rate, a year is only option like boat launch. Fishermans are already penalized for doing business in CBJ by CBJ tax that does not apply on the fishing grounds. Tax only applies when a person comes back to Juneau to sell fish."

"Fee would have to be nominal or I'll sell from my my ship."

"Regular moorage rate."

"Maybe a one time permit \$75.00/ Business."

"Daily fee to help maintain site."

(No)

"Because you could just tie in the transient area and sell from there."

"We can already sell at the loading zones, I would not agree to a price."

"Maybe, it depends again, I have an established enough customer base that I could do direct deliveries, if need be lie if it was not economical for me to pay the fee."

"Juneau Harbors charges for everything and doesn't really do much to help commercial fisherman and when they try to they always go overboard. Give us a simple drive down a dock in Harris instead."

"I cant charge enough to customers to justify an additional fee. The only reason to direct market is for more income, the extra work and risk involved in direct marketing have to be worth my time and effort."

"I do not do very much Direct Marketing and couldn't afford to pay a lot. I Direct Market mostly as a service to the community it is a lot more work and not a lot of money."

"I believe that if wouldn't cost much once set up and we already pay harbor fees also it adds to the community and harbor visitors to our state love this kind of thing."

"I already pay marketing fees."

"This is a thing that benefits the people of Juneau it is a bonus for the customer to be able to get this make my day and make it harder to sell fish to my friends and neighbors for "cost" and it only hurts the people of Juneau."

11 If you have additional comments or ideas, please lets us know.