

# Tourism and Recreation

Tourism, as a whole, has been the fastest-growing industry in Southeast Alaska and is a significant private-sector employer in the region. According to the Alaska Department of Labor, "scenic and sightseeing transportation" related employment has increased by 49% between 2003 and 2009, while "accommodation" employment fell by 10%. Tourism and transportation had 3,225 average annual employment in 2009 (a two percent increase over 2003) with an average wage of \$33,953.

## Southeast Alaska Tourism and Transportation Cluster

| Cluster/Industry Name                     | NAICS Industry Code | Annual Average Monthly Employment 2003 | Annual Average Monthly Employment 2009 | Change 2003-2009 | Businesses 2009 | Wages 2009         | Avg wage 2009   |
|---|---------------------|--|--|------------------|-----------------|--------------------|-----------------|
| <b>Tourism and Transportation Cluster</b> |                     | <b>3,175</b>                           | <b>3,225</b>                           | <b>2%</b>        | <b>312</b>      | <b>109,505,610</b> | <b>\$33,953</b> |
| Air transportation                        | 481                 | 702                                    | 716                                    | 2%               | 39              | 26,690,965         | \$37,295        |
| Water transportation                      | 483                 | 262                                    | 268                                    | 2%               | 19              | 15,859,978         | \$59,124        |
| Truck transportation                      | 484                 | 189                                    | 214                                    | 13%              | 21              | 8,497,920          | \$39,787        |
| Scenic and sightseeing transportation     | 487                 | 488                                    | 727                                    | 49%              | 100             | 25,185,358         | \$34,639        |
| Support activities for transportation     | 488                 | 321                                    | 207                                    | -36%             | 26              | 10,300,807         | \$49,762        |
| Accommodation                             | 721                 | 1,213                                  | 1,094                                  | -10%             | 107             | 22,970,582         | \$21,005        |

Source: Alaska Department of Labor and JEDC.

Generally, tourism in Southeast Alaska has been on a long upward trend until the last two years (2009 and 2010). The largest component of the Southeast Alaska tourism industry is the cruise ship industry. By tracking the number of cruise passengers to the region, the growth or decline of tourism overall can also be tracked.

### Cruise Ship Traffic

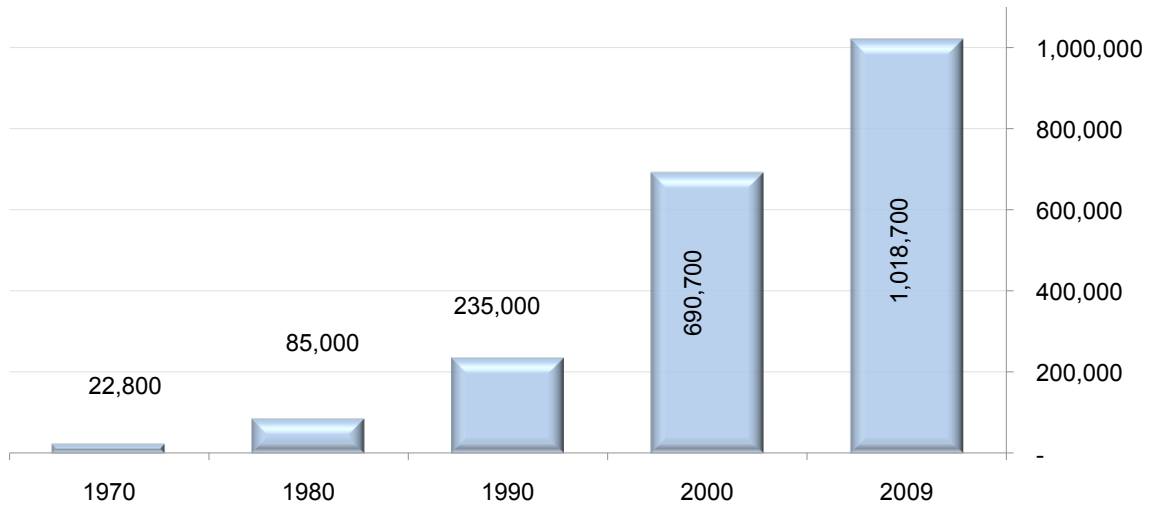
From 1970 to 1980, the number of cruise passengers in the region nearly tripled, from 22,800 to 85,000, only to nearly double again from 1980 to 1990. From 1990 to 2008, when cruise passengers peaked, the number of cruise passengers more than tripled, to 1.03 million. The high volume of cruise passengers coming to the region has provided numerous opportunities for entrepreneurship in Southeast Alaska, and businesses

Between 1990 and 2009, the number of cruise ship passengers coming to Southeast Alaska more than quadrupled to over a million.



have sprouted up offering shore based excursions, shopping opportunities, and an array of dining options. Others have taken advantage of the marketing of Southeast Alaska and developed non-cruise ship travel packages and accommodations targeted at travelers coming to Southeast Alaska. One group of entrepreneurs even went as far as to develop an entire cruise ship port at Icy Strait Point in Hoonah Alaska to take advantage of the interest of the cruise ship industry in our region.

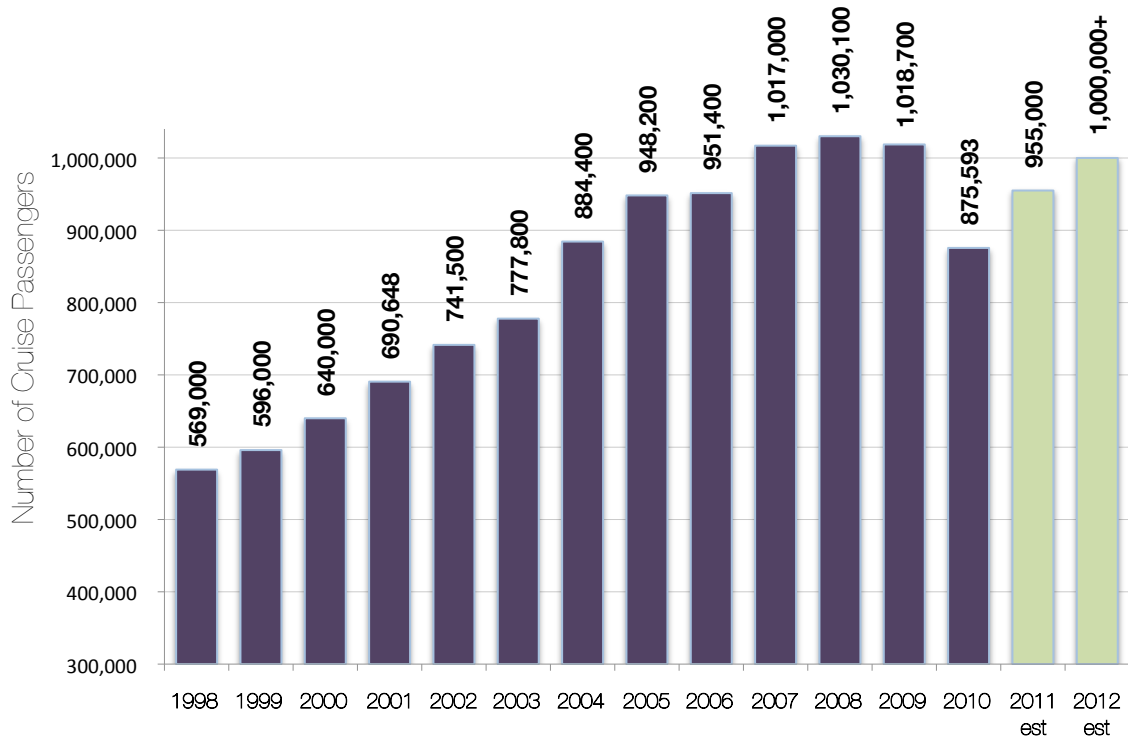
### Cruise Passengers Visiting Southeast Alaska, 1970-2009



**Source:** Juneau Convention and Visitors Borough, McDowell Group, Cruise Line Agencies of Alaska, various historical sources.

In the past two years, the number of cruise passengers to the region has declined. In 2010, Southeast Alaska was visited by 875,593 million cruise ship tourists, representing a 14-percent decline in cruise passenger traffic over 2009, following a one percent decline in passengers from 2008 to 2009. The last time cruise passengers decreased was 20 years ago in 1989, following the Exxon Valdez oil spill. The recent declines can be attributed to the global recession, which has taken its toll on the travel industry across the board. The Alaska cruise ship head tax has also been cited as contributing to some lines' decision to reduce ships and sailings. To mitigate one of these issues, Governor Parnell signed legislation in June 2010 to reduce the amount of the head tax. It is anticipated that by 2012 Juneau and Southeast Alaska cruise passengers numbers will once again exceed one million.

## Southeast Alaska Cruise Passengers 1998-2012



**Source:** McDowell Group and Cruise Line Agencies of Alaska. Estimates by JEDC.

The majority of the cruise passengers make port calls at the larger communities, but some travel to more rural areas. Hoonah (Icy Strait Point) began receiving cruise ships in recent years, and visits to their facility will likely continue to grow. However, it can be argued that some of the growth in Hoonah cruise passengers was at the expense of other ports. Haines, Petersburg and Wrangell passenger numbers are significantly down from past years.

## Cruise Ship Passenger Visits to Southeast Alaska, 2000 - 2010

| Community               | 2010    | % Change 2000-2010 |
|-------------------------|---------|--------------------|
| Haines                  | 32,259  | -83%               |
| Hoonah/Icy Strait Point | 122,974 | 100%               |
| Juneau                  | 875,593 | 37%                |
| Ketchikan               | 828,929 | 45%                |
| Petersburg              | 5,755   | -93%               |
| Sitka                   | 144,383 | -7%                |
| Skagway                 | 697,060 | 24%                |
| Wrangell                | 3,869   | -42%               |

Source: Cruise Line Agencies of Alaska, 2009.

## Cruise Passenger Spending

A 2006 survey of visitor activity, conducted for the Alaska Office of Tourism Development, estimated that visitors arriving by cruise ship spent an average of \$636 per person per trip in Alaska, mostly in Southeast Alaska. Cruise ship visitors spent an estimated total of \$600 million in the region in that year. A 2009 study by the McDowell Group, "Economic Impacts of the Visitor Industry in Juneau 2007-2008," examined the total economic impacts of tourism on the community of Juneau. According to the McDowell Group, visitors spent \$190 million in Juneau in 2008, including \$147 million by cruise ship passengers and crew. A summary of these findings is presented below.

### Juneau Visitor Volume and Spending in Juneau, 2007-2008

|   | Average spending per visitor | Volume (Number of Departures) | Total Spending in Millions |
|---|------------------------------|-------------------------------|----------------------------|
| Juneau Visitors                           |                              |                               |                            |
| Cruise Ship Passengers*                   | \$144                        | 969,600*                      | \$139.6                    |
| Cruise Ship Crew Members                  | \$300                        | 24,400                        | \$7.3                      |
| AK Air Visitors (summer, non-AK resident) | \$383                        | 84,500                        | \$32.4                     |
| Ferry Visitors (summer, non-AK resident)  | \$179                        | 22,000                        | \$3.9                      |
| AK Air Visitors (winter, non-AK resident) | \$414                        | 12,300                        | \$5.2                      |
| Ferry Visitors (winter, non-AK resident)  | \$414                        | 3,300                         | \$1.4                      |
| Total                                     | Avg. \$170                   | 1,116,100                     | \$189.7                    |

**Source:** McDowell Group, "Economic Impacts of the Visitor Industry in Juneau 2007-2008," April 2009. The study period was over 12 months from October 2007 through September of 2008.

\* In this table, cruise ship passengers who do not disembark are not counted. Small ship cruise passengers who exited Juneau by air are counted as "air visitors" in the table. The study period was 12 months, from the end of 2007 and most of 2008. The above numbers do not include in-state residents traveling to Juneau.

According to the study, there were 2,230 visitor jobs in Juneau in 2007-2008, with an associated payroll of \$75 million. The average annual wage for Juneau workers in the visitor industry is \$33,600. (Note: This is an annualized wage based on full time employment.)

### Visitor Industry Employment and Payroll in Juneau, 2007-2008

|            | Direct       | Indirect and Induced | Total        | Percent of Juneau Total |
|------------|--------------|----------------------|--------------|-------------------------|
| Employment | 2,230        | 520                  | 2,750        | 13%                     |
| Payroll    | \$75 million | \$20 million         | \$95 million | 9%                      |

**Source:** McDowell Group, "Economic Impacts of the Visitor Industry in Juneau 2007-2008," April 2009.

Some businesses in the region that earn money from cruise ship passengers are owned and operated by non-Alaska residents and employ summer-only residents, so an undetermined portion of those earnings leaves the region. A 1999 study of visitor impact to the economy of Skagway (Alaska's third most popular visitor destination in 2006), indicated that 90% of the income in the visitor industry in that community was earned by non-Alaska businesses.

## **Independent Travelers**

In addition to the region's cruise passengers, Southeast hosts up to 200,000 independent travelers during the summer, and 30,000 during the winter and fall, according to the Alaska Visitors Statistics Program (AVSP). In 2010, although the number of cruise passengers to the region decreased, the number of independent travelers actually increased by approximately two percent in Juneau, where 120,000 independent travelers visited in the summer of 2010, according to the Juneau Convention and Visitors Bureau. Visitors who travel to Southeast Alaska by air, ferry, or highway spend significantly more per person than cruise ship passengers in the region. According to a 2007 ISER study entitled "The Regional Economy of Southeast Alaska", on average, travelers coming to Southeast Alaska by air in 2001 spent nearly twice as much per party as those arriving by cruise ship, while those arriving by ferry spent nearly three times as much.

A recent study by ISER, the 2009 "Nature Based Tourism in Southeast Alaska" looked at visitors from cruise ships, as well as independent travelers who were attracted to the Southeast region for nature-based adventure. According to their findings, nature-based tourism generates about \$277 million per year of direct business revenues in Sitka, Juneau, Chichagof Island, Prince of Wales Island, Petersburg and Wrangell. Average revenue per visitor varied among communities and activities, ranging from \$140 per visitor in Juneau to more than \$2,600 per visitor on Prince of Wales Island. Other findings from the study are as follows:

- "The tourism businesses in cruise ports of call that appear to be most successful either have a cruise ship shore excursion contract or are catering to overnight (non-cruise) guests with high-quality and high-value services. Examples of these types of businesses include sport fishing lodges and multi-day yacht cruises."
- "Independent travelers also appear to seek communities with fewer visitors and those that they perceive to be more "authentic," such as Petersburg, Wrangell, and communities on Chichagof Islands. A lack of transportation capacity, whether on scheduled jets or on ferries, may be limiting the opportunities for these smaller communities. Less marketing may also be a factor limiting visits by independent travelers."
- "The primary marketing mechanisms for smaller, non-cruise related businesses are the internet and word of mouth. In addition, many customers return to the same fishing lodge, yacht tour, or charter business year after year."
- "Promoting wildlife watching is an important marketing strategy for Southeast Alaska communities. Visitor bureaus currently produce pamphlets with charismatic large animals, such as whales and bears. Bureau staff cited studies showing the desire to see wildlife was attracting a large portion of out-of-state visitors."

## Recreation

Recreation is a key draw to Southeast Alaska for both residents and visitors alike. In the Southeast Alaska Business Climate Survey 2010, businesses ranked "recreational opportunities" as the most significant benefit towards operating business in Southeast Alaska.

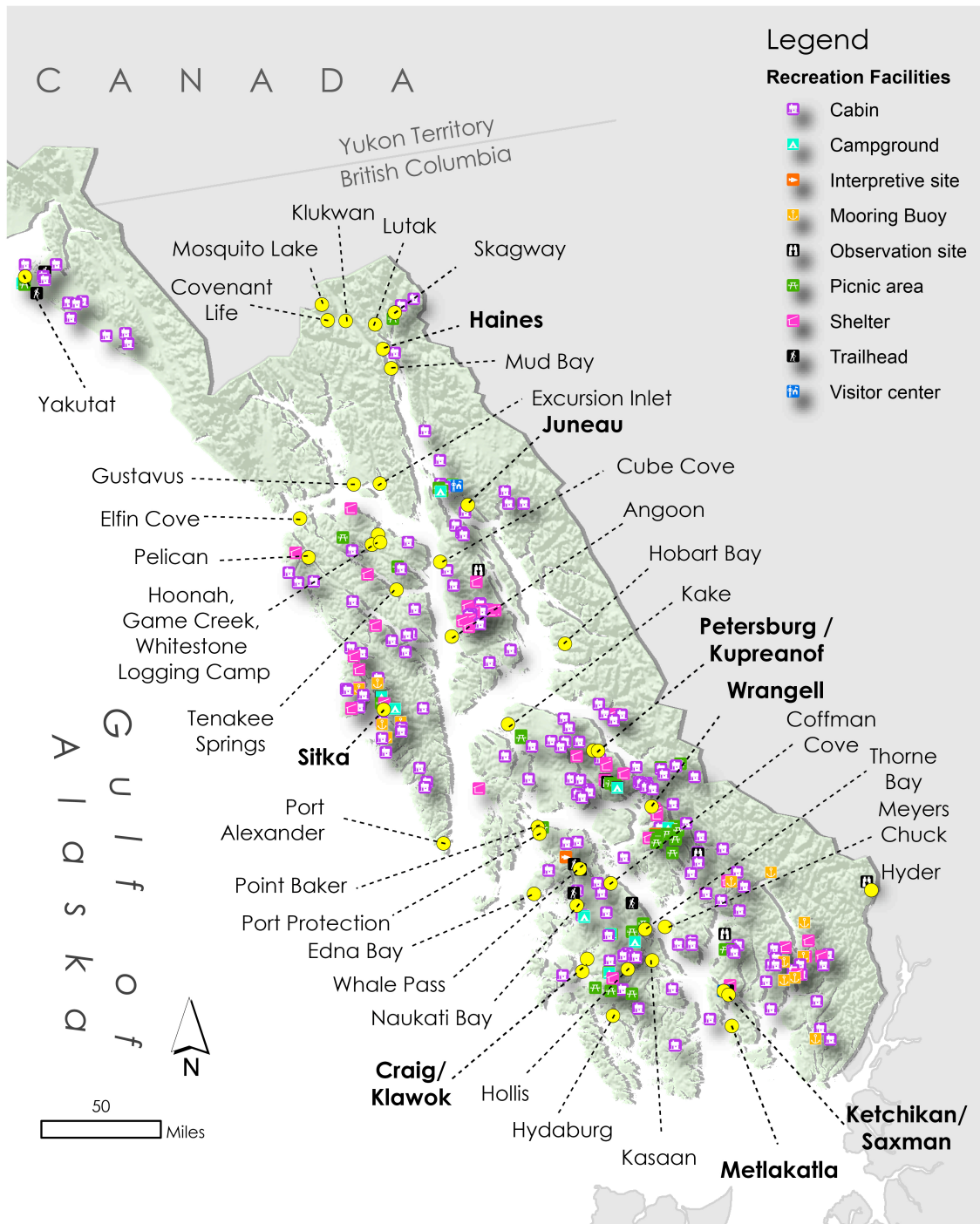
In Southeast Alaska, recreation resources and activities are dispersed over large areas with almost infinite entry points via saltwater boat and airplane access, making it difficult to quantify recreation activities. While residents and nonresidents use Southeast Alaska recreational resources quite differently, it is clear that recreation opportunities in Southeast play a major role in terms of why people choose to live, work, or travel here. According to a recent (August 2010) study by the USDA Forest Service entitled, "Characterization of Resident and Non-resident Visitors to Alaska National Forests," the most popular primary recreation activities for non-residents include hiking, viewing nature, and fishing. According to the study, the top recreation activities reported by Southeast residents in the Tongass include fishing, camping, hunting, and "relaxing, socializing, fun." According to the study, Southeast Alaskans make use of air and water transportation to reach desired locations in the Tongass for purposes of recreation. "The use of boats and planes to access national forest land by national forest visitors living in Southeast Alaska is extensive. Half of the Southeast Alaska resident visitors reported using a boat or plane and the average number of visits per year via boat or plane was high." According to the findings of the study, nearly all Southeast residents participate in recreation activities during the year.

In 2009 the US Forest Service reported that there was over 1.7 billion Recreation Visitor Days spent on guided recreational activities in the Tongass National Forest. Recreation Visitor Day is a 12 hour period where the forest is being used for recreation purposes. This could be one person for 12 hours or 12 people for one hour. (RVD is a statistic used by some ranger districts in the calculations of their recreation capacity.) These guided activities include everything from hunting and fishing to camping and hiking, involving all modes of transportation in and out of remote areas. There are currently about 240 guide and outfitters permitted to operate within the Tongass National Forest. According to the Tongass activity use report for 2009, by far the highest visitor activity in the Tongass is a visit to the Mendenhall Glacier Visitors Center. Overall, the second most popular activity is a helicopter landing tour, followed by a dog-sled tour, both in Juneau. Following Juneau with the second highest visitor count to the Tongass is Ketchikan, where the most popular activities are flightseeing landing tours and remote-setting nature tours. The district with the highest recorded hours spent on guided recreational activities is Wrangell at almost 10,000 hours in all, with visitors engaged in canoeing and hiking logging the most hours. Sitka comes in second on time spent recreating in its forest, but for entirely different activities: freshwater fishing, camping, and brown bear hunting. In Petersburg camping is the most guided activity. In 2009 the Forest Service authorized about 150 brown bear hunts across the forest which can sell for about \$15,000 to

\$25,000 per hunt, and about 350 black bear hunts which go for \$5,000 to \$7,000 on average. Freshwater fishing is normally more expensive to participate in as even the day hunts generally have some transportation costs associated with them. An estimate of an average cost for a freshwater fishing day is about \$600/day. Many guides bring clients to different districts during a single trip.

Below is a map with recreational facilities, along with tables listing some recreation facilities by community. Clearly, recreational opportunities in Southeast Alaska are extensive, and highly desired by both residents and visitors.

# Location of Southeast Alaska Forest Service Recreation Facilities



Source: US Forest Service





## Campgrounds in the Tongass National Forest

### **Craig Area**

- Harris River Campground (14 sites)
- Thorne Bay Area
- Eagles Nest (11 sites)
- Horseshoe Hole Campsite (2 sites)
- Lake No. 3 Campsite (2 sites)
- Staney Bridge Campsite (2 sites)
- Ketchikan Area
- Signal Creek\* (24 sites)
- Three C's (4 sites)
- Last Chance\* (19 sites)

### **Wrangell Area**

- Nemo Campsites (8 sites)
- Lower Salamander Recreation Site (3 sites)

### **Petersburg Area**

- Ohmer Creek (10 sites)

### **Sitka Area**

- Sawmill Creek (11 sites)
- Starrigavan (35 sites)

### **Juneau Area**

- Auke Village (12 sites)
- Mendenhall Lake (68 sites)

## Tongass Trails – Forest Service

|  |  |  |
|--|--|--|
| <b><u>Misty Fiords</u></b>   |  |  |
| Bakewell Lake<br>Hugh Smith<br>Manzanita Lake<br>Titan                 | Checats Cove<br>Lake Grace<br>Nooya Lake<br>Winstanley Lake      | Ella Lake<br>Humpback Creek<br>Punchbowl Lake                  |
| <b><u>S. Prince of Wales</u></b>                                       |  |  |
| Canoe Point<br>One Duck<br>Trocadero                                   | Harris River<br>Pass Lake<br>Twenty-Mile Spur                    | Kegan Lake<br>Soda Lake  |
| <b><u>N. Prince of Wales</u></b>                                       |  |  |
| Cavern Lake Cave<br>Karta River<br>Rio Roberts<br>Shipley Bay          | El Capitan Cave<br>Lake Ellen/Salt Chuck<br>Salmon Bay Lake      | Honker Divide Canoe Rt<br>Red Bay Lake<br>Sarkar Canoe Route   |
| <b><u>Ketchikan</u></b>  |  |  |
| Connell Lake<br>Low Lake<br>Orchard Lake<br>Shelokum Lake<br>Wolf Lake | Deer, Silvis, John<br>McDonald Lake<br>Perseverance<br>Swan Lake | Long Lake<br>Naha River<br>Reflection Lake<br>Ward Lake Nature |
| <b><u>Wrangell</u></b>   |  |  |
| Aaron Creek<br>Highbush Lake   | Anan Creek<br>Hot Springs  | Berg Creek<br>Institute Creek                                  |

|  |   |  |
|--|---|--|
| Kunk Lake<br>Mill Creek<br>Rainbow Falls   | Long Lake<br>Nemo Saltwater Access Trail<br>Salamander Ridge  | Mallard Slough<br>North Wrangell<br>Thoms Lake   |
| <b><u>Petersburg/Kake</u></b><br>Affleck Canal Portage<br>Blind River Rapids<br>Cathedral Falls<br>Hamilton Creek<br>Ideal Cove<br>Petersburg Lake<br>Raven<br>Threemile Portage | Bay of Pillars Portage<br>Cascade Creek<br>Colp Lake<br>Harvey Lake<br>Kah Sheets Lake<br>Petersburg Mountain<br>Spurt Lake<br>Twin Ridge Ski | Big John Bay<br>Castle River<br>Green Rocks<br>Hooter<br>Ohmer Creek<br>Portage Mountain Loop<br>Three Lakes<br>Upper Twin Ski |
| <b><u>Sitka</u></b><br>Beaver Lake<br>Cross<br>Estuary Life<br>Forest and Muskeg<br>Harbor Mountain-Gavan Hill   | Halibut Point State<br>Recreation Site<br>Indian River<br>Medvejie Lake<br>Mosquito Cove  | Mt. Verstovia<br>Sitka National Historical Park<br>Starrigavan Valley<br>Thimbleberry Lake-Heart Lake                          |
| <b><u>Hoonah</u></b><br>Bear Paw Lake<br>Coyote Beach  | Lower Suntaheen Creek<br>Neka Hot Springs<br>Pavlof Marsh   | Suntaheen Creek Fishpass<br>Wukuklook Beach  |
| <b><u>Admiralty Island</u></b><br>Admiralty Cove-Young Lake  | Lake Alexander-Mole Harbor  |  |

## Recreation Cabins and Shelters

|   |  |  |
|---|--|--|
| <b><u>Misty Fiords Cabins</u></b><br>Alava Bay<br>Beaver Camp<br>Checats<br>Ella Narrows  | Hugh Smith Lake<br>Humpback Lake<br>Manzanita Lake   | Wilson Narrows<br>Wilson View<br>Winstanley Island<br>Winstanley Lake  |
| <b><u>Misty Fiords Shelters</u></b><br>Big Goat Lake<br>Manzanita Bay   | Nooya Lake<br>Punchbowl Lake   | Winstanley Lake  |
| <b><u>Prince of Wales Island Vicinity Cabins</u></b><br>Barnes Lake<br>Black Bear Lake<br>Control Lake<br>Essowah Lake<br>Honker Lake<br>Josephine Lake | Karta Lake<br>Karta River<br>Kegan Cove<br>Kegan Creek<br>Point Amargura<br>Red Bay Lake<br>One Duck | Salmon Bay Lake<br>Salmon Lake<br>Sarkar Lake<br>Shiple Bay<br>Staney Creek<br>Sweetwater Lake<br>Troller's Cove<br>Twelvemile Cabin |
| <b><u>Ketchikan Vicinity Cabins</u></b><br>Anchor Pass<br>Blind Pass<br>Fish Creek<br>Heckman Lake<br>Helm Bay  | Helm Creek<br>Jordan Lake<br>McDonald Lake<br>Patching Lake  | Phocena Bay<br>Plenty Cutthroat<br>Reflection Lake<br>Southeast Heckman Lake*  |

|  |   |  |
|--|---|--|
| <b><u>Ketchikan Vicinity Shelters</u></b>  |   |  |
| Lake Shelokum<br>Long Lake   | McDonald Lake<br>Reflection Lake  | Wolf Lake  |
| <b><u>Wrangell Vicinity Cabins</u></b>   |   |  |
| Anan Bay<br>Anan Lake<br>Berg Bay<br>Binkley Slough<br>Eagle Lake<br>Frosty Bay<br>Garnet Ledge<br>Gut Island #1             | Gut Island #2<br>Harding River<br>Koknuk<br>Little Dry Island<br>Mallard Slough<br>Marten Lake<br>Middle Ridge Cabin*<br>Mount Flemer | Mount Rynda<br>Sergief Island<br>Shakes Slough #1<br>Shakes Slough #2<br>Steamer Bay*<br>Twin Lakes<br>Virginia Lake*  |
| <b><u>Wrangell Vicinity Shelters</u></b>   |   |  |
| Kunk Lake<br>Long Lake   | North Wrangell High<br>Country<br>North Wrangell Pond   | Shoemaker Bay Overlook   |
| <b><u>Petersburg Vicinity Cabins</u></b>   |   |  |
| Beecher Pass<br>Big John Bay<br>Breiland Slough<br>Cascade Creek<br>Castle Flats<br>Castle River<br>Deboer Lake              | Devil's Elbow<br>Harvey Lake<br>Kadake Bay<br>Kah Sheets Bay<br>Kah Sheets Lake*<br>Petersburg Lake<br>Portage Bay                    | Ravens Roost<br>Salt Chuck East<br>Spurt Cove<br>Swan Lake<br>Towers Arm<br>West Point*  |
| <b><u>Petersburg Vicinity Shelters</u></b>   |   |  |
| Bay of Pillars<br>Falls Lake   | Frenchy Ridge   | Twin Creek   |
| <b><u>Sitka Vicinity Cabins</u></b>  |   |  |
| Allan Point<br>Appleton Cove<br>Avoss Lake<br>Baranof Lake<br>Brent's Beach<br>Davidof Lake<br>Fred's Creek<br>Goulding Lake | Kanga Bay<br>Kook Lake<br>Lake Eva<br>Moser Island<br>North Beach<br>Piper Island<br>Plotnikof Lake<br>Redoubt Lake                   | Salmon Lake<br>Samsing Cove<br>Sevenfathom Bay<br>Shelikof<br>Sitkoh Lake East<br>Sitkoh Lake West<br>Starrigavan Creek Cabin*<br>Suloia Lake<br>White Sulphur Springs |
| <b><u>Sitka Vicinity Shelters</u></b>  |   |  |
| Harbor-Gavan<br>Kakul Narrows  | Long Bay<br>Mt. Edgecumbe Trail   | North Neva<br>Otstoia  |
| <b><u>Hoonah Vicinity Cabin</u></b>  |   |  |
| Greentop Harbor<br>Eight Fathom Cabin  |   |  |
| <b><u>Admiralty Island Cabins</u></b>  |   |  |
| Admiralty Cove<br>Big Shaheen<br>Church Bight<br>Distin Shelter<br>Florence Lake (East)                                      | Hasselborg Creek<br>Jim's Lake<br>Lake Alexander<br>Lake Kathleen<br>Little Shaheen   | N. Young Lake<br>Pybus<br>South Young Lake<br>Sportsmen  |
| <b><u>Admiralty Island Shelters</u></b>  |   |  |
| Lake Alexander   | Mole Harbor   |  |

|   |   |   |
|---|---|---|
| <b><u>Juneau Vicinity Cabins</u></b>  |   |   |
| Berner's Bay<br>Dan Moller<br>Eagle Glacier Memorial                                  | East Turner Lake<br>John Muir<br>Peterson Lake                                | Taku Glacier<br>West Turner Lake<br>Windfall Lake                 |
| <b><u>Skagway Vicinity Cabins</u></b>   |   |   |
| Denver Caboose  | Laughton Glacier  |   |
| <b><u>Yakutat Vicinity Cabins</u></b>   |   |   |
| Alsek River<br>Eagle (Middle Situk N)<br>Harlequin Lake North<br>Harlequin Lake South | Itallo River<br>Lower Dangerous<br>Middle Dangerous<br>Raven (Middle Situk S) | Situk Lake<br>Square Lake<br>Tanis Mesa North<br>Tanis Mesa South |

## **Arts, Entertainment and Culture**

Along with outdoor recreation, another key reason that people live, work and visit Southeast Alaska is due to the rich arts and cultural offerings – from Tlingit art and culture, to world class theater, to basketball. The table below begins to quantify some of the arts, entertainment and cultural resources by community. Some of these events clearly combine arts and culture with recreation and sports. The list is not entirely complete, but does capture the extensive level of arts and culture enjoyed by members of our communities.

### Southwest Alaska Arts, Entertainment and Cultural Resources

| <b>Community</b> | <b>Culture Type</b> | <b>Institution Name</b>                      | <b>Special Notes</b>         |
|------------------|---------------------|--|------------------------------|
| Angoon           | Gallery             | Angoon Artists Gallery                       |                              |
| Craig            | Annual Event        | Harvest Festival                             | October                      |
| Craig            | Annual Event        | Prince of Wales International Marathon       | May                          |
| Craig            | Annual Event        | Sunnahae Arts Festival                       | August                       |
| Craig            | Arts Council        | Sunnahae Arts Council                        |                              |
| Haines           | Annual Event        | ACTFEST                                      |                              |
| Haines           | Annual Event        | Alaska Bald Eagle Festival                   | November                     |
| Haines           | Annual Event        | Alcan 200 Road Rally                         | Snow machine race<br>January |
| Haines           | Annual Event        | Dick Hotch Basketball Tournament             | February                     |
| Haines           | Annual Event        | Great Alaska Craftbeer and Homebrew Festival | May                          |
| Haines           | Annual Event        | Haines Fisherman's King Salmon BBQ           | June                         |
| Haines           | Annual Event        | Homebrew Festival                            | May                          |
| Haines           | Annual Event        | King Salmon Derby                            | May - June                   |
| Haines           | Annual Event        | Kluane Chilkat International Bike Relay      | June                         |
| Haines           | Annual Event        | Mardi Gras                                   | September                    |
| Haines           | Annual Event        | Southeast Alaska State Fair                  | Summer                       |
| Haines           | Artists             | Ravens Window                                |                              |
| Haines           | Arts Council        | Haines Arts Council                          |                              |
| Haines           | Auditorium          | The Chilkat Center for the Arts              |                              |
| Haines           | Craft               | Alaska Indian Arts                           |                              |

| Community | Culture Type              | Institution Name                                      | Special Notes                 |
|-----------|---------------------------|---|-------------------------------|
| Haines    | Cultural Center           | Fort Seward Tribal House                              |                               |
| Haines    | Dance                     | Chilkat Dancers Storytelling Theatre                  |                               |
| Haines    | Museum                    | Alaska Indian Arts                                    |                               |
| Haines    | Museum                    | American Bald Eagle Foundation                        |                               |
| Haines    | Museum                    | Hammer Museum   |                               |
| Haines    | Museum                    | Sheldon Museum & Cultural Center                      |                               |
| Haines    | Seasonal Event            | Farmer's Market                                       | Summer                        |
| Haines    | Theatre                   | Lynn Canal Community Players                          |                               |
| Hoonah    | Historical Sight/Museum   | Icy Strait Point                                      | Historic Cannery              |
| Juneau    | Annual Event              | Alaska Folk Festival                                  | Annual - April                |
| Juneau    | Annual Event              | Alaska Public Market                                  | Crafts                        |
| Juneau    | Annual Event              | Coffee & Jam Dance Festival                           |                               |
| Juneau    | Annual Event              | CrossSound  | Concert Series                |
| Juneau    | Annual Event              | Gold Medal Basketball Tournament                      | Sports Tournament             |
| Juneau    | Annual Event              | Gold Rush Days  | History                       |
| Juneau    | Annual Event              | Golden North Salmon Derby                             | August                        |
| Juneau    | Annual Event              | Jazz & Classics Festival                              |                               |
| Juneau    | Annual Event              | Juneau Underground Movie Project Summer Film Festival |                               |
| Juneau    | Annual Event              | Juneau World Affairs Council                          | World Affairs                 |
| Juneau    | Annual Event              | King Salmon Derby                                     | Fishing Derby                 |
| Juneau    | Annual Event              | Local Food Festival                                   | Food Festival                 |
| Juneau    | Annual Event              | Maritime Festival                                     |                               |
| Juneau    | Annual Event              | Taste of Juneau Food & Music Festival                 | Food Festival/ Music Festival |
| Juneau    | Annual Event              | Wearable Art Extravaganza                             | Runway Show                   |
| Juneau    | Arts & Humanities Council | Juneau Arts and Humanities Council                    |                               |
| Juneau    | Arts Organization         | Alaska Arts Education Consortium                      |                               |
| Juneau    | Arts Organization         | Arts for Kids   |                               |
| Juneau    | Auditorium                | Centennial Hall                                       |                               |
| Juneau    | Choir                     | Alaska Youth Choir                                    |                               |
| Juneau    | Community Art Studio      | The Canvas  |                               |
| Juneau    | Dance School              | Janice Holst Dance Studios                            |                               |
| Juneau    | Dance Studio              | Juneau Dance Unlimited                                |                               |
| Juneau    | Ensemble                  | Juneau String Ensembles                               |                               |
| Juneau    | Film Club                 | Juneau Underground Movie Project                      |                               |
| Juneau    | Folk Dance                | Juneau ContraDancers                                  | as monthly Ballroom Dances    |
| Juneau    | Folk Dance                | Juneau International Folkdancers                      |                               |
| Juneau    | Gallery                   | Juneau Artists Guild                                  |                               |
| Juneau    | Jazz                      | Juneau Jazz & Classics                                |                               |
| Juneau    | Museum                    | Alaska State Museum                                   |                               |
| Juneau    | Museum                    | House of Wickersham                                   | Closed until further notice   |
| Juneau    | Museum                    | Juneau-Douglas City Museum                            |                               |
| Juneau    | Museum                    | Last Chance Mining Museum                             |                               |
| Juneau    | Opera                     | Juneau Lyric Opera Company                            |                               |
| Juneau    | Opera                     | Opera to Go   | Concert Series                |

| Community  | Culture Type            | Institution Name                           | Special Notes                  |
|------------|-------------------------|--|--------------------------------|
| Juneau     | Planetarium             | Nancy Drake Planetarium                    |                                |
| Juneau     | Symphony                | Juneau Symphony                            |                                |
| Juneau     | Theatre                 | Perseverance Theatre                       |                                |
| Juneau     | Theatre Club            | Theatre in the Rough                       |                                |
| Ketchikan  | Annual Event            | Blueberry Arts Festival                    | July                           |
| Ketchikan  | Annual Event            | Gigglefeet Dance Festival                  | July                           |
| Ketchikan  | Annual Event            | Jazz & Cabaret Festival                    |                                |
| Ketchikan  | Annual Event            | Ketchikan Halibut Derby                    | July                           |
| Ketchikan  | Annual Event            | Ketchikan King Salmon Derby                | May - June                     |
| Ketchikan  | Annual Event            | Midwinter Medieval Feast                   |                                |
| Ketchikan  | Annual Event            | Wearable Art Show                          | February                       |
| Ketchikan  | Annual Event            | Winter Arts Faire                          | November                       |
| Ketchikan  | Arts Council            | Ketchikan Area Arts & Humanities Council   |                                |
| Ketchikan  | Choir                   | Ketchikan Community Concert Band           |                                |
| Ketchikan  | Community Art Gallery   | Main Street Gallery                        |                                |
| Ketchikan  | Concert Band            | McPherson Music Education Center           |                                |
| Ketchikan  | Convention Center       | Cape Fox Lodge & Convention Center         |                                |
| Ketchikan  | Craft                   | Ketchikan's Carver at the Creek            |                                |
| Ketchikan  | Craft                   | Studio K                                   |                                |
| Ketchikan  | Craft                   | The Soho Coho                              |                                |
| Ketchikan  | Cultural Center         | Saxman Tribal House                        |                                |
| Ketchikan  | Dance School            | Ketchikan Theatre Ballet                   |                                |
| Ketchikan  | Gallery                 | Arctic Spirit Gallery                      |                                |
| Ketchikan  | Gallery                 | Scanlon Gallery                            |                                |
| Ketchikan  | Historical Sight/Museum | Dolly's Enterprises, Inc.                  |                                |
| Ketchikan  | Historical Sight/Museum | Potlatch Park                              |                                |
| Ketchikan  | Historical Society      | Ketchikan Medieval and Renaissance Society |                                |
| Ketchikan  | Museum                  | Southeast Alaska Discovery Center          |                                |
| Ketchikan  | Museum                  | Tongass Historical Museum                  |                                |
| Ketchikan  | Museum                  | Totem Heritage Center                      |                                |
| Ketchikan  | Personal Art Studio     | Crazy Wolf Studio                          |                                |
| Ketchikan  | Seasonal Event          | The Monthly Grind                          | Open Mic                       |
| Ketchikan  | Seasonal Event Series   | Torch Nights                               | International music performers |
| Ketchikan  | Theatre                 | First City Players                         |                                |
| Metlakatla | Museum                  | Duncan Cottage Museum                      |                                |
| Petersburg | Annual Event            | Blessing of the Fleet                      | May                            |
| Petersburg | Annual Event            | Canned Salmon Classic                      | August                         |
| Petersburg | Annual Event            | Julebukking                                | Christmas Eve                  |
| Petersburg | Annual Event            | Little Norway Festival                     | May                            |
| Petersburg | Annual Event            | Octoberfest Artshare                       | October                        |
| Petersburg | Annual Event            | Octoberfest Celebration                    | October - November             |
| Petersburg | Annual Event            | Salmon Derby                               | May                            |
| Petersburg | Arts Council            | Petersburg Arts Council                    |                                |
| Petersburg | Craft                   | Rain Country Quilters Guild                |                                |
| Petersburg | Cultural Organization   | Sons of Norway                             |                                |

| Community  | Culture Type            | Institution Name                            | Special Notes                 |
|------------|-------------------------|---|-------------------------------|
| Petersburg | Museum                  | Clausen Memorial Museum and Shop            |                               |
| Sitka      | Annual Event            | 10th Annual Sitka Artisans Market           | December                      |
| Sitka      | Annual Event            | Alaska Day Festival                         | October                       |
| Sitka      | Annual Event            | Banff Mountain Film Festival                | February                      |
| Sitka      | Annual Event            | Julie Hughes Triathlon                      | May                           |
| Sitka      | Annual Event            | Mudball Classic Softball Tournament         | September                     |
| Sitka      | Annual Event            | Russian Christmas and Starring              | January                       |
| Sitka      | Annual Event            | Sitka Arti Gras                             | March Music and Arts Festival |
| Sitka      | Annual Event            | Sitka Jazz Festival                         | February                      |
| Sitka      | Annual Event            | Sitka Music Festival                        | February                      |
| Sitka      | Annual Event            | Sitka Salmon Derby                          | May                           |
| Sitka      | Annual Event            | Sitka Summer Music Festival                 |                               |
| Sitka      | Annual Event            | Sitka Whalefest                             | November                      |
| Sitka      | Arts Council            | Greater Sitka Arts Council                  |                               |
| Sitka      | Auditorium              | Harrigan Centennial Hall                    |                               |
| Sitka      | Camp                    | Sitka Fine Arts Camp                        |                               |
| Sitka      | Craft                   | Baranof Arts and Crafts Association         |                               |
| Sitka      | Craft                   | Ocean Wave Quilters                         |                               |
| Sitka      | Craft                   | Rainy Day Doll Makers                       |                               |
| Sitka      | Museum                  | Southeast Alaska Indian Cultural Center     |                               |
| Sitka      | Cultural Organization   | Sons of Norway                              |                               |
| Sitka      | Native Dance            | Gájaa Héen Dancers                          | Tlingit Dance Group           |
| Sitka      | Native Dance            | Noow Tlein Dancers                          | Tlingit Dance Group           |
| Sitka      | Dance School            | Sitka Studio of Dance                       |                               |
| Sitka      | Historical Society      | Sitka Historical Society                    |                               |
| Sitka      | Improv Club             | Sitka Comedy Group                          |                               |
| Sitka      | Museum                  | Sheldon Jackson Museum                      |                               |
| Sitka      | Historical Sight/Museum | Sitka National Historical Park              |                               |
| Sitka      | Museum                  | Sitka Historical Society and Museum         |                               |
| Sitka      | Native Dance            | Sheet' ka Kwa'an Naa Kahidi Community House |                               |
| Sitka      | Theatre                 | Baranof Theatre Guild                       |                               |
| Sitka      | Dance                   | New Archangel Russian Dancers               |                               |
| Skagway    | Annual Event            | Annual Elks Summer Solstice Party           | June                          |
| Skagway    | Annual Event            | Buckwheat Ski Classic                       | March                         |
| Skagway    | Annual Event            | International Mini Folk Festival            | April                         |
| Skagway    | Annual Event            | International Softball Tournament           | July                          |
| Skagway    | Annual Event            | Klondike International Road Relay           | September                     |
| Skagway    | Annual Event            | Pat Moore Memorial Game Fish Derby          | July                          |
| Skagway    | Annual Event            | Skagway Marathon                            | June                          |
| Skagway    | Arts Council            | Skagway Arts Council                        |                               |
| Skagway    | Museum                  | Skagway Museum and Archives                 |                               |
| Skagway    | Historical Site/Museum  | Klondike Gold Rush National Historical Park |                               |
| Wrangell   | Annual Event            | Garnet Festival                             | April                         |
| Wrangell   | Annual Event            | Harvest Festival                            | October                       |
| Wrangell   | Annual Event            | King Salmon Fishing Derby                   | May - June                    |

| Community       | Culture Type     | Institution Name                                 | Special Notes |
|-----------------|------------------|--|---------------|
| Wrangell        | Annual Event     | Muskeg Meadows Annual Membership Golf Tournament | May           |
| Wrangell        | Annual Event     | Polar Bear Swim                                  | January       |
| Wrangell        | Annual Event     | Tent City Festival                               | February      |
| Wrangell        | Craft            | Muskeg Maleriers                                 |               |
| Wrangell        | Cultural Center  | Chief Shakes Island and Tribal House             |               |
| Wrangell        | Historical Sight | Petroglyph Beach State Historic Park             |               |
| Wrangell        | Museum           | Wrangell Museum                                  |               |
| Wrangell        | Museum           | Tibal House of the Bear                          |               |
| Klawock City    | Annual Event     | King Salmon Sport Fishing Derby                  | Summer        |
| Klawock City    | Annual Event     | Klawock Cooperative Association's Water Games    | July          |
| Craig           | Annual Event     | Celebration by the Sea Quilt Show                | May           |
| Klawock City    | Annual Event     | Elizabeth Peratrovich Celebration                | February      |
| Klawock City    | Historical Sight | Totem Pole Park                                  |               |
| Kake            | Annual Event     | Dog Salmon Festival                              | July          |
| Wrangell        | Annual Event     | Wrangell Bearfest                                | July          |
| Sitka           | Annual Event     | Sitka Seafood Festival                           | August        |
| Hoonah          | Dance            | Mt. Fairweather Dancers                          |               |
| Petersburg      | Annual Event     | Devil's Thumb Brewfest and Chili Cook-off        |               |
| Sitka           | Arts Center      | Sitka Performing Arts Center                     |               |
| Prince of Wales | Annual Event     | Culture Camp and Pole Raising Ceremony           |               |
| Thorne Bay      | Annual Event     | Community Cleanup                                |               |
| Naukatik Bay    | Annual Event     | Mud Bogg Races                                   | July          |
| Naukatik Bay    | Annual Event     | Skunk Cabbage Festival                           | July          |
| Prince of Wales | Annual Event     | International Coastal Cleanup                    | September     |
| Craig           | Annual Event     | Summer Arts Festival                             | August        |
| Tenakee Springs | Collection       | Tenakee Historical Collection                    |               |
| Ketchikan       | Theatre          | Coliseum Twin Theatre                            |               |
| Juneau          | Cinema           | Goldtown Nickelodeon                             |               |
| Juneau          | Cinema           | Gross Alaska Theatres                            |               |
| Juneau          | Cinema           | Silverbow Back Room Cinema                       |               |



## **Tourism and Recreation Strength/Constraints**

### ***Key strengths/opportunities***

Southeast Alaska has a significant level of outdoor recreation, nature-based resources, and a rich cultural history that is highly desirable to the visitor and resident alike. The visitor industry has been one of the fastest growing in Southeast Alaska in recent years. Wilderness designations in the Tongass have created 'special places' which are what tourists want to see. These designations essentially created the growing interest in tourism to the region. The places adventure tours take clients to are typically "named" special places; and, because these places are protected, the condition they will be in is predictable. One can rely on them for consistently delivering as marketed.

Financial resources have been available from USFS Tongass receipts and State Marine Passenger fees to help build infrastructure and utilities with the cooperation of local government.

Larger, successful businesses in some communities have worked to help smaller businesses survive. For example, rather than contract with one company that has 5 boats to provide visitor experiences, one business is now contracting with 5 one-boat companies. By doing this, their contracts help provide individuals with the collateral they need to get financing for their smaller businesses.

Also, when a major business in a community markets the experience (fishing, whale watching) and brings in business, then some of this business can go to local resident entrepreneurs who take people stream fishing, kayaking, etc. Where it has occurred, teaming together to work on regional, or sub-regional, marketing helps all the community.

### ***Key constraints/obstacles***

Tourism related jobs are generally lower wage than in other Southeast Alaska industries, and often the work available is not year round. There is a great influx of people that comes from out of state for these seasonal jobs; so while there is a general benefit, the regional economy does not reap the rewards of an increase in year round population. Passenger fees levied locally and regionally on the cruise industry have resulted in fewer visits to some communities and an antagonistic relationship with the industry. Also, many tourism related business owners are from out of the region, so profits are not reinvested in the local economy.

The lack of transportation infrastructure was cited as an obstacle for businesses. Some tourism businesses felt that this could be mitigated by consistency in the ferry schedule from year to year. As stated by one business owner:

*"The lack of consistency in the ferry schedule makes many opportunities impossible. If you could count on a reliable transportation connection between say, Sitka and Petersburg, then suddenly this is a business market. Instead, the fast ferry is going there one month or one year and not the next. What will it be this fall? A tourism business cannot make plans or do marketing with this inconsistency. It is too bad that the fast ferry with its touted regular departure schedules didn't work; it would have changed the way the SE region functions."*

While high freight costs were by far the most significant barrier to operating any business in Southeast Alaska, regular AMHS ferry service also was considered critical to meeting freight needs.

Finally, the executive interviews highlighted that often neighboring communities see each other as competitors in trying to deliver the same visitor experiences or products. The region as a whole could benefit if communities identify unique assets and focus on those, look for ways to team up and collaborate, and think and communicate as a region.