

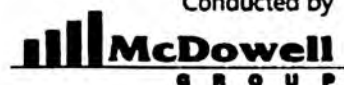
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A L A S K A

Visitor Statistics Program

Alaska Visitor Volume and Profile

Summer 2006



Conducted by

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Section VI:
Selected Summary
Profiles

Summary Profile: Sportfishing

About one in five (20 percent) Alaska visitors participated in sportfishing at some time during their Alaska trip. About four in ten fishing participants fished unguided while six in ten used guide services ranging from a half-day charter while on an Alaska cruise to a week-long fishing lodge package. This chapter profiles visitors who participated in sportfishing, segmented into guided and unguided. Sample sizes are presented in the table below.

**Market Definition and Sample Size
Sportfishing**

Market	Definition	Sample Size	Maximum Margin of Error
Guided fishing	Participated in guided fishing	396	±5.0%
Unguided fishing	Participated in unguided fishing	374	5.2

The sportfishing markets differed from the overall visitor market, as well as from each other, in the following ways.

- Guided fishing participants tended to be mostly vacation/pleasure visitors. Almost one in three unguided participants were in Alaska visiting friends and relatives.
- The unguided market accessed Alaska primarily by air, with 12 percent of them arriving by highway as well. One-quarter of the guided market were cruise passengers, although air was the preferred access mode for the majority of guided clients.
- Southcentral, Southeast and Interior regions were the primary destinations of the sportfishing market. When compared to the overall market, fishing participants were much more likely to visit the Southwest region: 7 percent of guided participants visited Southwest, and 9 percent of unguided participants visited Southwest, compared to 3 percent of the overall market.
- Fishing participants were typical of visitors overall in their levels of satisfaction, with unguided and guided participants expressing nearly identical levels of satisfaction.
- They were much more likely to be repeat visitors, and unguided participants are predominantly from the Western U.S. Guided fishing participants tended to be a bit more affluent, and unguided participants slightly less affluent, than the average Alaska visitor.
- Both guided and unguided fishing participants mentioned other activities while in Alaska, especially shopping and wildlife viewing. They were less likely than the overall market to participate in city/sightseeing tours, day cruises, train, and historical/cultural attractions.

Trip Purpose and Packages Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Trip Purpose			
Vacation/pleasure	82%	85%	63%
Visiting friends or relatives	9	8	29
Business	5	1	2
Business and pleasure	4	6	6
Purchased multi-day package			
Yes	69%	61%	18%
Package type (Base: non-cruise, purchased package)			
Fishing lodge package	46%	83%	67%
Adventure tour	14	5	13
Wilderness lodge package	13	7	3
Rail package	9	2	3
Motorcoach tour	5	1	1
Other	12	2	13

Transportation Modes Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Mode of Entry into Alaska			
Air	49%	72%	83%
Cruise	45	21	2
Highway	4	6	12
Ferry	1	1	3
Mode of Exit from Alaska			
Air	49%	67%	86%
Cruise	47	27	2
Highway	4	5	10
Ferry	1	1	2
Used to Travel Between Communities¹			
Motorcoach/bus	26%	21%	3%
Train	19	18	4
Rental vehicle	14	25	22
Air	12	23	29
Personal vehicle	9	11	32
State ferry	3	3	6
Rental RV	2	3	5
Personal RV	2	4	7
None of the above	40	23	15
Don't know/refused	1	1	2

¹ Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type

Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Average length of stay in Alaska	9.1 nights	10.2 nights	14.5 nights
Regions Visited			
Southeast	71%	57%	33%
Southcentral	56	68	76
Interior	33	32	29
Southwest	3	7	9
Far North	3	3	3
Destinations Visited, Top 10			
Juneau	63%	40%	12%
Ketchikan	53	36	14
Skagway	53	35	9
Anchorage	50	58	64
Denali	28	27	19
Fairbanks	24	20	16
Seward	21	31	31
Glacier Bay	27	15	5
Sitka	18	14	5
Whittier	14	16	15
Lodging Types Used			
Cruise ship	60%	34%	4%
Hotel/motel	42	50	35
Lodge	19	34	16
Private home	12	15	46
B&B	6	12	12
Commercial campground	4	8	15
State/national campground	3	4	10
Wilderness camping	2	3	9
Other	7	11	15

Visitor Activities - Top 10¹

Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Shopping	71%	63%	64%
Wildlife viewing	53	61	59
City/sightseeing tours	44	30	15
Day cruises	40	35	21
Train	38	26	7
Hiking/nature walk	30	30	36
Museums	28	24	25
Native cultural tours/activities	20	17	7
Fishing	20	100	100
Historical/cultural attractions	18	16	11

¹ Based to intercept respondents only.

Satisfaction Ratings Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Compared to expectations			
Much higher	25%	26%	20%
Higher	36	36	32
About as expected	35	34	42
Value for the money, compared to other destinations			
Much better	13%	14%	13%
Better	25	24	26
About the same	48	46	48
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)			
Overall experience in Alaska	70% 4.7	70% 4.7	69% 4.7
Accommodations	54 4.4	49 4.4	48 4.3
Restaurants	42 4.2	37 4.2	31 4.1
Shopping	29 4.0	24 4.0	25 4.0
Visitor information services	53 4.4	50 4.4	52 4.4
Sightseeing	66 4.6	66 4.6	65 4.6
Tours and activities	60 4.5	57 4.4	56 4.4
Wildlife viewing	50 4.2	54 4.4	56 4.4
Transportation within Alaska	45 4.3	43 4.3	36 4.1
Friendliness of residents	69 4.6	66 4.6	66 4.6
Value for the money	32 4.1	31 4.0	31 4.0
Very likely to recommend Alaska as a vacation destination	79%	78%	79%
Very likely to return to Alaska in the next five years	40%	53%	71%

Previous Alaska Travel Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Been to Alaska before for vacation	34%	48%	67%
Average # of vacation trips (base: repeat travelers)	3.4	4.1	4.8
Previous mode of transportation used to enter/exit Alaska			
Air	72%	81%	82%
Cruise	26	19	7
Highway	11	8	12
Ferry	3	2	4

Trip Planning Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Ave. # of months, trip decision	8.1	9.6	8.3
Ave. # of months, trip booking	5.4	5.7	3.9
Used Internet ¹	68%	73%	72%
Booked over Internet ¹	42	51	58
Booked through travel agent ¹	52	39	16
Other Sources - Top 10¹			
Friends/family	45%	46%	65%
Cruise line/tour company	38	29	2
Prior experience	26	38	51
Brochures	25	24	21
AAA	16	15	9
Travel guide/book	13	13	9
Television	11	11	3
Magazine	8	8	9
Milepost	6	10	14
Convention & Visitors Bureaus	5	6	7

¹ Based to intercept respondents only.

Demographics Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Origin			
Western US	39%	45%	60%
Southern US	19	18	11
Eastern US	13	10	8
Midwestern US	13	19	13
Canada	6	4	2
Other International	9	3	5
Other Demographics			
Average party size ¹	2.4	2.8	2.5
Male/female	50/50	63/37	65/35
Average age	51.6	49.7	48.1
Children in household	25%	28%	27%
Retired/semi-retired	39	63	63
College graduate	59	36	37
Average income	\$103,000	\$115,000	\$94,000

¹ Based to intercept respondents only.

Summary Profile: Southcentral Communities

Visitors to Southcentral and the nine most-frequently visited communities are profiled in this chapter. Definitions for each community and sample sizes are provided in the table below.

**Market Definition and Sample Size
Southcentral Communities**

Market	Definition	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	3,675	±1.7%
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	3,265	1.7
Seward	Visited Seward, day and/or overnight	1,448	2.6
Whittier	Visited Whittier, day and/or overnight	1,032	3.2
Talkeetna	Visited Talkeetna, day and/or overnight	884	3.4
Kenai/Soldotna	Visited Kenai or Soldotna, day and/or overnight	777	3.5
Homer	Visited Homer or Seldovia, day and/or overnight	745	3.7
Palmer/Wasilla	Visited Palmer or Wasilla, day and/or overnight	666	3.9
Girdwood	Visited Girdwood or Alyeska, day and/or overnight	571	4.2
Valdez	Visited Valdez, day and/or overnight	400	5.0

Differences between Southcentral Alaska visitors and the overall Alaska market include:

- Southcentral visitors were somewhat more likely to be VFRs or be traveling for business.
- They were much more likely to enter and exit Alaska by air, and less likely to travel by cruise ship. Southcentral Alaska visitors were also more likely to visit Interior Alaska communities than the overall market.
- Their average trip length was slightly higher than the overall market (10.9 nights and 9.1 nights respectively).
- Southcentral visitors were more likely than the overall market to participate in tours and activities.

Unique characteristics when comparing visitors to individual Southcentral communities include:

- Anchorage, Palmer/Wasilla, and Girdwood attracted the highest percentage of business travelers. Palmer/Wasilla drew the largest percentage of VFRs.
- Valdez visitors were the most likely to enter or exit the state by highway or ferry. The communities of Palmer/Wasilla, Homer, and Kenai/Soldotna also attracted relatively high percentages of highway and

ferry travelers. Correspondingly, visitors to these communities also reported the longest length of stay in Alaska (ranging from 14.6 nights to 18.8 nights).

- Visitors to Anchorage, Seward, Whittier, and Talkeetna were the most likely to be cruise passengers, while visitors to Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were more likely to stay in private homes and in various campgrounds.
- Visitors to Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were the most likely to have visited Alaska previously and the most likely to return to Alaska in the next 5 years.

Trip Purpose & Packages Southcentral Communities

	All Visitors	South Central	Anchorage	Seward	Whittier	Talkeetna
Trip Purpose						
Vacation/pleasure	82%	75%	75%	81%	86%	88%
Visiting friends/rel.	9	12	12	12	7	7
Business only	5	7	8	2	2	1
Business/pleasure	4	5	6	5	5	3
Purchased multi-day package						
Yes	69%	56%	55%	52%	67%	66%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	33%	30%	24%	14%	18%
Adventure tour	14	17	17	17	11	15
Wilderness lodge	13	18	18	19	27	23
Rail package	9	13	13	15	22	17
Motorcoach tour	5	6	7	6	7	10
Other	12	15	14	19	19	17

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Purpose					
Vacation/pleasure	71%	73%	62%	66%	81%
Visiting friends/rel.	18	19	26	19	14
Business only	3	2	6	4	2
Business/pleasure	7	5	6	11	3
Purchased multi-day package					
Yes	30%	22%	20%	33%	24%
Package type (Base: non-cruise, purchased package)					
Fishing lodge	47%	47%	26%	16%	14%
Adventure tour	14	16	25	15	18
Wilderness lodge	19	17	19	24	15
Rail package	7	3	6	22	3
Motorcoach tour	1	3	8	6	18
Other	12	14	16	18	31

Transportation Modes Southcentral Communities

	All Southcentral Communities	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Mode of Entry Into Alaska						
Air	49%	71%	72%	72%	56%	70%
Cruise	45	23	22	18	38	23
Highway	4	6	5	9	6	6
Ferry	1	1	1	1	1	1
Mode of Exit from Alaska						
Air	49%	71%	72%	70%	73%	64%
Cruise	47	23	23	22	21	30
Highway	4	5	5	7	5	5
Ferry	1	1	1	1	1	1
Used to Travel Between Communities¹						
Motorcoach/bus	26%	40%	39%	29%	49%	52%
Train	19	32	32	26	40	49
Rental vehicle	14	26	27	42	27	27
Air	12	17	17	13	15	14
Personal vehicle	9	15	14	16	12	9
State ferry	3	4	4	7	6	4
Rental RV	2	3	3	8	4	8
Personal RV	2	3	3	6	3	1
None of the above	40	7	8	2	2	1
Don't know/refused	1	1	1	1	<1	<1
Mode of Entry Into Alaska						
Air		80%	76%	74%	83%	61%
Cruise		6	6	6	9	4
Highway		13	17	19	8	31
Ferry		1	1	2	1	3
Mode of Exit from Alaska						
Air		78%	81%	76%	82%	61%
Cruise		9	3	5	12	4
Highway		11	15	18	5	31
Ferry		1	2	1	1	3
Used to Travel Between Communities¹						
Motorcoach/bus		13%	7%	9%	34%	15%
Train		12	7	9	28	12
Rental vehicle		39	45	41	44	33
Air		18	20	10	16	10
Personal vehicle		29	25	33	21	22
State ferry		6	9	5	7	20
Rental RV		10	12	8	6	12
Personal RV		7	9	9	2	19
None of the above		3	1	4	2	1
Don't know/refused		1	1	1	<1	3

¹ These responses are based to intercept respondents only.

Length of Stay, Destinations & Lodging Type Southcentral Communities

	All Visitors	Juneau Anchorage	Whittier Fairbanks	Seward	Whitcomb Ketchikan	Kenai Sitka
Average length of stay in Alaska	9.1 nights	10.9 nights	10.7 nights	12.4 nights	11.2 nights	12.8 nights
Regions Visited						
Southeast	71%	53%	52%	51%	68%	65%
Southcentral	56	100	100	100	100	100
Interior	33	53	54	61	57	89
Southwest	3	5	5	3	2	4
Far North	3	5	5	6	5	4
Destinations Visited, Top 10						
Juneau	63%	47%	46%	43%	61%	57%
Ketchikan	53	42	41	34	60	50
Skagway	53	43	42	36	62	56
Anchorage	50	90	100	93	90	89
Denali	28	47	48	56	52	86
Glacier Bay/Gustavus	27	29	29	28	43	36
Fairbanks	24	38	37	39	40	60
Seward	21	38	39	100	29	49
Sitka	18	14	14	17	17	14
Whittier	14	25	25	20	100	33
Lodging Types Used						
Cruise ship	60%	45%	43%	38%	58%	53%
Hotel/motel	42	66	70	70	61	74
Lodge	19	29	27	27	28	50
Private home	12	17	16	17	11	11
B&B	6	9	10	14	10	14
Commercial campground	4	7	7	11	8	9
State/national campground	3	5	5	8	5	7
Wilderness camping	2	3	3	3	2	3
Other	7	9	9	11	11	9

Length of Stay, Destinations & Lodging Type (cont'd)
Southcentral Communities

Average length of stay in Alaska	9.1 nights	14.6 nights	15.0 nights	14.6 nights	11.9 nights	18.8 nights
Regions Visited						
Southeast	71%	31%	29%	30%	34%	46%
Southcentral	56	100	100	100	100	100
Interior	33	52	52	63	58	92
Southwest	3	5	8	4	4	6
Far North	3	5	5	6	5	12
Destinations Visited, Top 10						
Juneau	63%	20%	14%	16%	23%	23%
Ketchikan	53	18	11	13	19	15
Skagway	53	21	17	20	24	32
Anchorage	50	89	88	94	98	87
Denali	28	45	45	52	50	67
Glacier Bay/Gustavus	27	20	14	10	15	15
Fairbanks	24	34	31	40	34	66
Seward	21	61	63	52	63	57
Sitka	18	5	6	8	10	9
Whittier	14	28	25	27	39	36
Lodging Types Used						
Cruise ship	60%	15%	9%	10%	21%	9%
Hotel/motel	42	59	56	57	71	57
Lodge	19	25	22	18	24	18
Private home	12	30	31	32	25	24
B&B	6	17	23	18	19	18
Commercial campground	4	17	21	19	11	34
State/national campground	3	13	16	14	9	23
Wilderness camping	2	5	5	6	5	9
Other	7	12	17	12	9	13

Statewide Activities – Top 10¹
Southcentral Communities

	All Visitors	South Central	Alaska Range	Seward	Whittier	Takotna
Shopping	71%	71%	71%	75%	78%	88%
Wildlife viewing	53	65	65	75	73	83
City/sightseeing tours	44	39	39	33	47	52
Day cruises	40	46	47	63	65	67
Train	38	38	37	31	50	55
Hiking/nature walk	30	37	37	45	44	43
Museums	28	34	36	47	41	45
Native cultural tours/act.	20	22	21	21	24	38
Fishing	20	25	22	31	21	28
Historical/cultural attractions	18	18	19	22	24	25

	Kenai/ Soldotna	Horner	Palmer/ Wasilla	Girdwood	Valdez
Shopping	64%	69%	70%	77%	80%
Wildlife viewing	63	66	61	80	78
City/sightseeing tours	22	25	23	38	33
Day cruises	42	48	38	65	64
Train	15	12	15	30	20
Hiking/nature walk	41	46	45	54	46
Museums	35	44	41	51	62
Native cultural tours/act.	14	12	15	23	18
Fishing	57	53	33	20	36
Historical/cultural attractions	14	17	17	22	25

¹ Based to intercept respondents only.

Activities in Community/Region¹
Southcentral Communities

	Southcentral	Denali	Chugach	Wrangell	Kenai
Wildlife viewing	28%	11%	29%	15%	9%
Birdwatching	9	4	11	4	2
Cultural activities	27	22	12	1	7
Museums	21	16	11	1	5
Native cultural tours/act	7	8	1	-	-
Historical/cultural attractions	6	4	2	-	2
Gold panning/mine tour	1	-	-	-	-
Visiting friends/relatives	21	14	2	1	2
Day cruises	21	1	32	28	6
Hiking/nature walk	18	8	18	2	6
Fishing	17	1	9	2	9
Guided	10	<1	6	<1	5
Unguided	10	1	3	1	4
City/sightseeing tours	14	13	8	4	6
Camping	8	3	10	2	3
Flightseeing	5	1	<1	-	15
Shows/Alaska entertainment	4	4	<1	-	-
Tramway/gondola	3	<1	-	-	-
Dog sledding	2	<1	5	-	1
Rafting	2	-	-	-	3
Kayaking/canoeing	2	-	3	-	-
Salmon bake	2	1	2	<1	1
Biking	2	2	-	-	-
Hunting	<1	-	-	-	<1
Northern Lights viewing	<1	<1	-	-	-
Other	3	1	2	<1	1

¹ Based on intercept respondents only.

Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Activities in Community/Region (Cont'd)¹
Southcentral Communities

	Central	Sewardna	Kenai	Wasilla	Kenai Peninsula	Chugach
Wildlife viewing	28%	22%	32%	12%	14%	25%
Birdwatching	9	6	13	1	3	9
Cultural activities	27	5	19	12	7	21
Museums	21	4	18	6	-	21
Native cultural tours/act.	7	-	<1	-	-	-
Historical/cultural attractions	6	2	2	5	1	3
Gold panning/mine tour	1	-	-	2	6	-
Visiting friends/relatives	21	19	9	25	3	5
Day cruises	21	3	8	1	4	24
Hiking/nature walk	18	14	11	13	13	13
Fishing	17	38	33	5	-	16
Guided	10	19	23	1	-	6
Unguided	10	23	13	4	-	11
City/sightseeing tours	14	4	4	2	3	8
Camping	8	14	13	13	2	27
Flightseeing	5	3	2	-	1	-
Shows/Alaska entertainment	4	-	<1	-	-	-
Tramway/gondola	3	-	-	-	31	-
Dog sledding	2	-	-	4	-	-
Rafting	2	4	-	1	2	1
Kayaking/canoeing	2	3	3	1	-	2
Salmon bake	2	2	<1	-	-	1
Biking	2	-	1	1	1	1
Hunting	<1	-	-	-	-	-
Northern Lights viewing	<1	-	-	-	-	-
Other	3	2	<1	5	-	-

¹ Based to intercept respondents only.

Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings Southcentral Communities

	All Visitors	South- Central	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Compared to expectations							
Much higher	25%	27%	27%	29%	31%	33%	
Higher	36	37	37	39	38	39	
About as expected	35	32	32	29	27	25	
Value for the money, compared to other destinations							
Much better	13%	13%	13%	13%	16%	12%	
Better	25	23	24	23	22	23	
About the same	48	46	46	45	48	46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)							
Overall exper. in Alaska	70% 4.7	71% 4.7	70% 4.7	73% 4.7	75% 4.7	76% 4.7	
Accommodations	54 4.4	50 4.4	49 4.3	44 4.3	51 4.4	52 4.4	
Restaurants	42 4.2	38 4.2	38 4.2	34 4.1	39 4.2	36 4.2	
Shopping	29 4.0	29 4.0	29 4.0	28 4.0	30 4.0	29 4.0	
Visitor info. services	53 4.4	56 4.5	56 4.5	56 4.5	56 4.5	59 4.5	
Sightseeing	66 4.6	69 4.6	69 4.6	71 4.7	72 4.7	72 4.7	
Tours and activities	60 4.5	61 4.5	61 4.5	64 4.6	63 4.6	62 4.5	
Wildlife viewing	50 4.2	53 4.3	53 4.3	57 4.4	51 4.3	53 4.3	
Transportation within Alaska	45 4.3	46 4.3	46 4.3	47 4.3	50 4.4	52 4.4	
Friendliness of residents	69 4.6	70 4.6	70 4.6	72 4.7	73 4.7	73 4.7	
Value for the money	32 4.1	31 4.0	31 4.0	30 4.0	33 4.0	29 4.0	
Very likely to recommend Alaska	79%	79%	80%	79%	82%	82%	
Very likely to return to Alaska in next five years	40%	44%	44%	40%	37%	31%	
		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez	
Compared to expectations							
Much higher		26%	20%	26%	28%	29%	
Higher		37	37	35	40	35	
About as expected		33	38	36	29	33	
Value for the money, compared to other destinations							
Much better		14%	12%	15%	13%	15%	
Better		24	20	22	22	18	
About the same		45	47	46	47	44	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)							
Overall exper. in Alaska		71% 4.7	68% 4.6	71% 4.7	75% 4.7	74% 4.7	
Accommodations		42 4.2	36 4.2	43 4.3	48 4.3	32 4.1	
Restaurants		34 4.1	31 4.1	35 4.1	41 4.2	28 4.0	
Shopping		24 4.0	23 4.0	29 4.1	28 4.0	27 4.0	
Visitor info. services		55 4.4	54 4.4	61 4.5	55 4.5	61 4.5	
Sightseeing		72 4.7	69 4.6	71 4.7	75 4.7	70 4.7	
Tours and activities		62 4.5	57 4.5	60 4.5	62 4.6	63 4.5	
Wildlife viewing		56 4.4	56 4.4	54 4.4	60 4.4	60 4.4	
Transportation within Alaska		41 4.2	36 4.1	38 4.2	49 4.4	37 4.1	
Friendliness of residents		70 4.6	68 4.6	68 4.6	72 4.6	72 4.6	
Value for the money		29 3.9	25 3.9	29 4.0	26 3.9	27 3.9	
Very likely to recommend Alaska		80%	76%	81%	79%	81%	
Very likely to return to Alaska in next five years		55%	55%	55%	51%	41%	

**Previous Alaska Travel
Southcentral Communities**

	All Visitors	South- central	Anchorage	Edward	Whittier	Talkeetna
Been to Alaska before for vacation	34%	37%	37%	31%	25%	24%
Average # of vacation trips (base: repeaters)	3.4	3.3	3.2	2.8	2.8	2.8
Previous mode of transportation used to enter/exit Alaska						
Air	72%	81%	80%	76%	76%	76%
Cruise	26	21	22	27	29	29
Highway	11	10	9	12	10	11
Ferry	3	2	2	1	2	1
		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Been to Alaska before for vacation		52%	51%	53%	43%	43%
Average # of vacation trips (base: repeaters)		3.5	3.8	4.1	3.3	3.0
Previous mode of transportation used to enter/exit Alaska						
Air		82%	78%	77%	85%	62%
Cruise		14	16	10	14	16
Highway		13	15	16	8	28
Ferry		2	3	3	1	5

**Trip Planning
Southcentral Communities**

	Anchorage visitors	South central	Admiral Island	Seward	Westport	Unalaska
Ave. # of months, trip decision	8.1	8.2	8.2	8.7	9.5	10.0
Ave. # of months, trip booking	5.4	5.1	5.0	4.9	5.9	5.9
Used Internet ¹	68%	70%	71%	76%	73%	73%
Booked over Internet ¹	42	47	48	53	48	44
Booked through travel agent ¹	52	47	47	38	49	55
Other Sources - Top 10¹						
Friends/family	45%	47%	46%	51%	42%	51%
Cruise line/ tour company	38	32	32	24	42	42
Prior experience	26	28	28	23	17	18
Brochures	25	26	27	33	24	32
AAA	16	16	17	22	20	24
Travel guide/book	13	15	15	24	17	22
Television	11	11	10	10	8	18
Magazine	8	9	9	14	7	15
Milepost	6	9	10	18	12	11
Convention & Visitors Bureaus	5	7	7	12	10	9

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Ave. # of months, trip decision	8.9	8.9	8.1	8.5	10.0
Ave. # of months, trip booking	4.3	4.2	3.5	4.4	3.8
Used Internet ¹	73%	78%	74%	75%	72%
Booked over Internet ¹	56	57	55	59	44
Booked through travel agent ¹	18	20	26	32	33
Other Sources - Top 10¹					
Friends/family	54%	50%	54%	55%	40%
Cruise line/ tour company	9	8	10	17	11
Prior experience	41	34	33	28	22
Brochures	27	34	31	28	35
AAA	15	21	22	22	24
Travel guide/book	15	20	18	17	26
Television	9	8	8	10	10
Magazine	9	10	16	14	10
Milepost	22	28	25	16	37
Convention & Visitors Bureaus	9	14	12	8	15

¹ Based to intercept respondents only.

Demographics Southcentral Communities

	All Visitors	South central	Anchorage	Seward	Whittier	Taleaitha
Origin						
Western US	39%	38%	38%	33%	32%	29%
Southern US	19	21	22	24	21	25
Eastern US	13	15	15	17	15	19
Midwestern US	13	15	15	16	19	18
Canada	6	3	3	4	3	2
Other International	9	7	7	7	9	8
Other Demographics						
Average party size ¹	2.4	2.3	2.2	2.5	2.5	2.4
Male/female	50/50	52/48	52/48	50/50	48/52	47/53
Average age	51.6	51.3	51.3	50.5	50.6	51.6
Children in household	25%	23%	22%	21%	22%	19%
Retired/semi-retired	39	40	40	42	40	45
College graduate	59	62	62	65	62	65
Average income	\$103,000	\$104,000	\$104,000	\$100,000	\$107,000	\$101,000
		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Origin						
Western US		42%	44%	44%	38%	31%
Southern US		19	19	19	19	21
Eastern US		10	11	11	14	13
Midwestern US		17	18	15	19	17
Canada		3	2	4	2	8
Other International		10	5	7	7	10
Other Demographics						
Average party size ¹		2.4	2.5	2.2	2.2	2.6
Male/female		57/43	55/45	52/48	51/49	50/50
Average age		50.4	50.6	51.0	49.2	50.9
Children in household		19%	18%	18%	23%	15%
Retired/semi-retired		40	44	42	36	51
College graduate		58	58	55	66	53
Average income		\$97,000	\$97,000	\$88,000	\$103,000	\$84,000

¹ Based to intercept respondents only.

Visitor Expenditures, Per Person¹
Southcentral Communities

	Al Visitors	South- Central	Anchorage	Seward	Whittier	Talkeetna
Ave. in-state expend.	\$934	\$1,138	\$1,181	\$1,365	\$1,182	\$1,328
Expend. in location		552	501	194	60	158
Lodging		145	164	56	5	48
Tours/activity/ entertainment		71	18	63	39	56
Gifts/souvenirs/ clothing		66	60	22	2	18
Food/beverage		104	76	36	5	25
Rental cars/fuel/ transportation		94	124	14	8	11
Other		72	59	3	1	-
		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Ave. in-state expend.		\$1,407	\$1,440	\$1,290	\$1,378	\$1,618
Expend. in location		341	313	144	109	210
Lodging		42	60	44	21	49
Tours/activity/ entertainment		50	85	9	23	54
Gifts/souvenirs/ clothing		24	39	14	9	15
Food/beverage		73	51	51	33	38
Rental cars/fuel/ transportation		43	30	23	23	20
Other		109	48	3	-	34

¹ Based to intercept respondents only.

Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

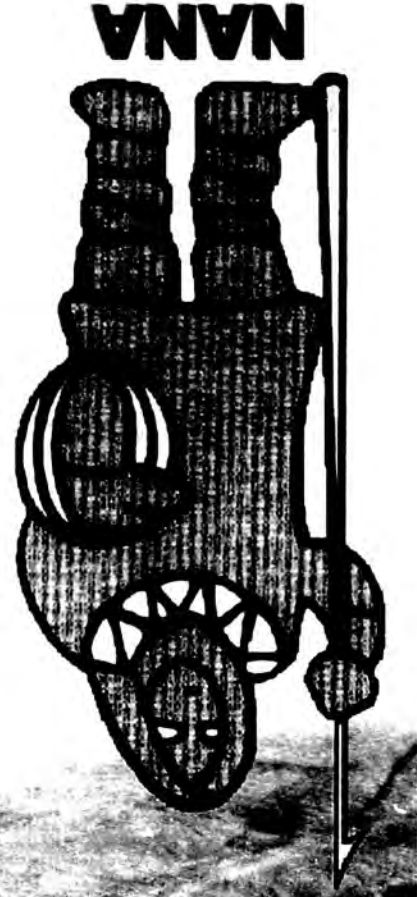
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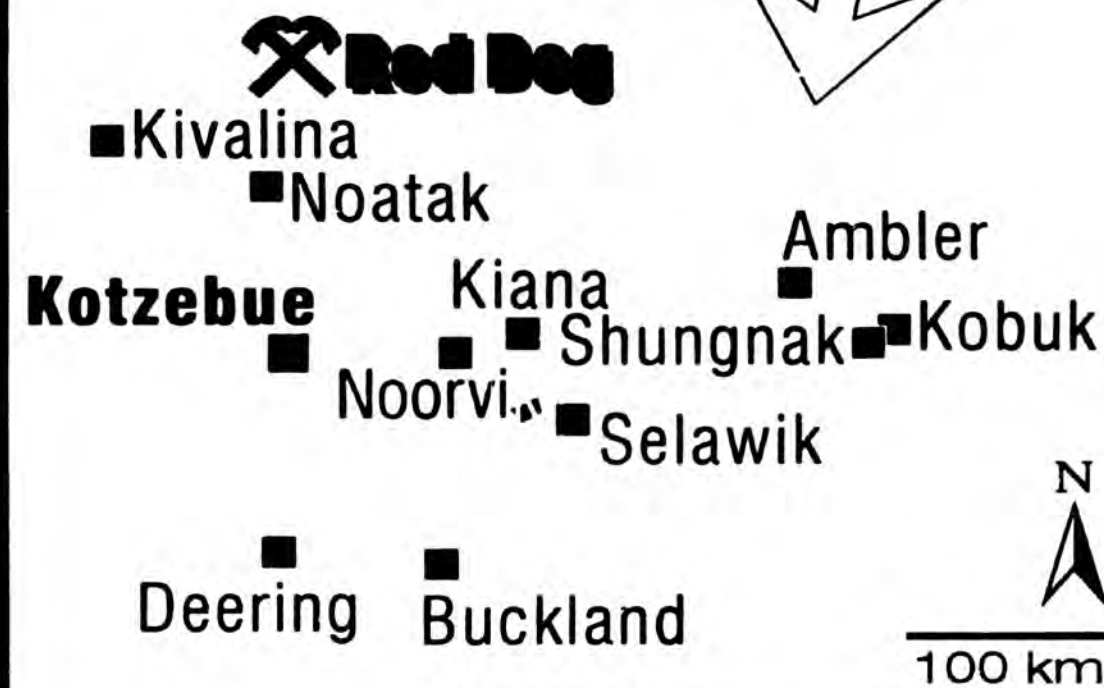
Red Dog Mine

**An Economic
Powerhouse In
Northwest Alaska**

teckcominco



The NANA Region



ALASKA

■ Fairbanks

■ Anchorage



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Red Dog Employment Committee Focus

To get NANA shareholders into
supervisory, technical, professional and
managerial positions at Red Dog.



Educational/Training Opportunities

- Pre-employment (Elementary and High School)
 - Career Awareness (38 - 2006)
 - Job Shadow (18 - 2006)
- Pre Apprentice (Mill, Maintenance, 10-20/year)
- On the Job (every shareholder, 6 trainers)
- Post Secondary Scholarships



Advancing Education in the Region

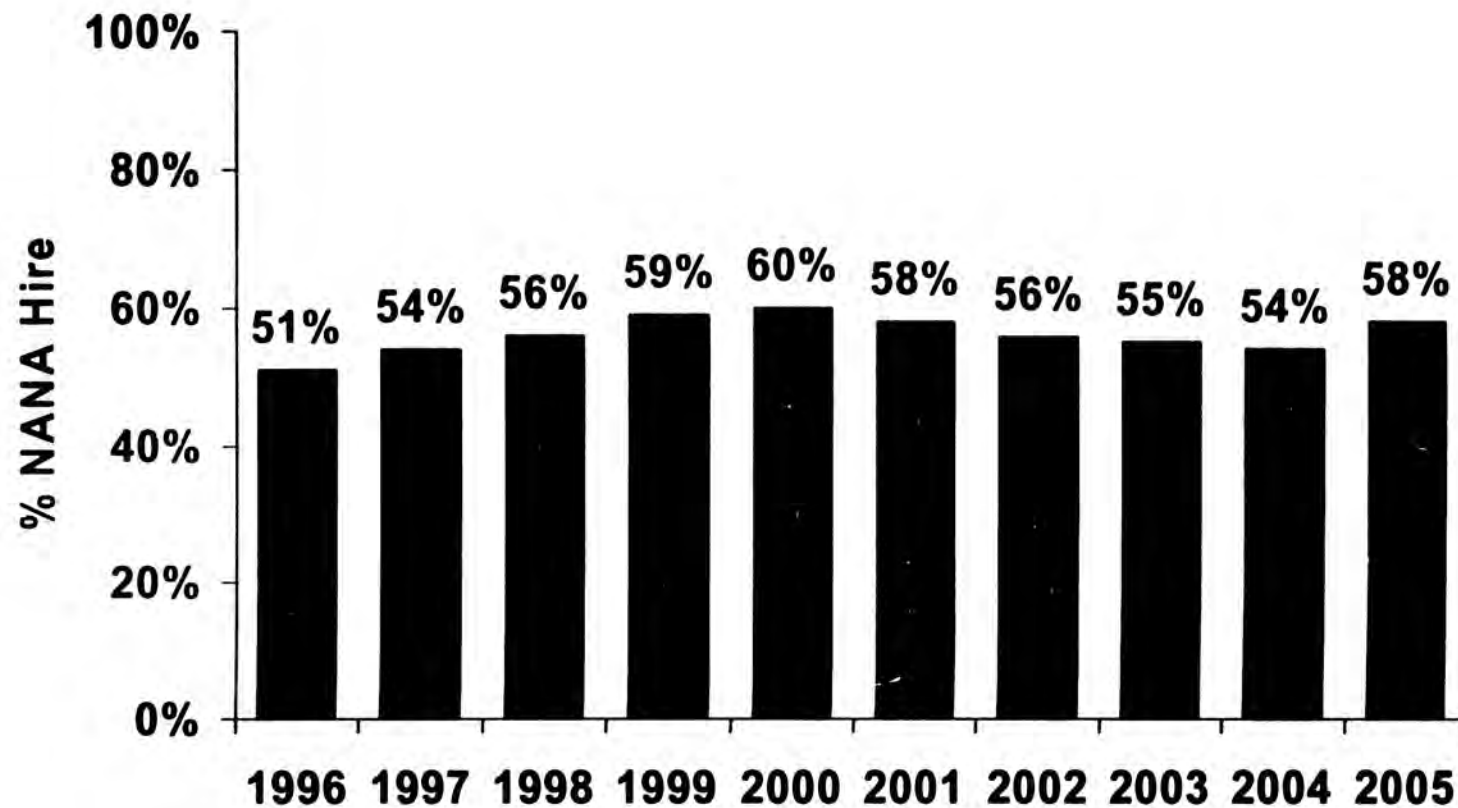


Noatak Science Class



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Maximize Shareholder Employment



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Employment

TCAK Employees	360
NANA Shareholders	54%
Alaskan Residents	83%

NANA Joint Venture Employees	
(trucking and catering contractors)	103
NANA Shareholders	64%

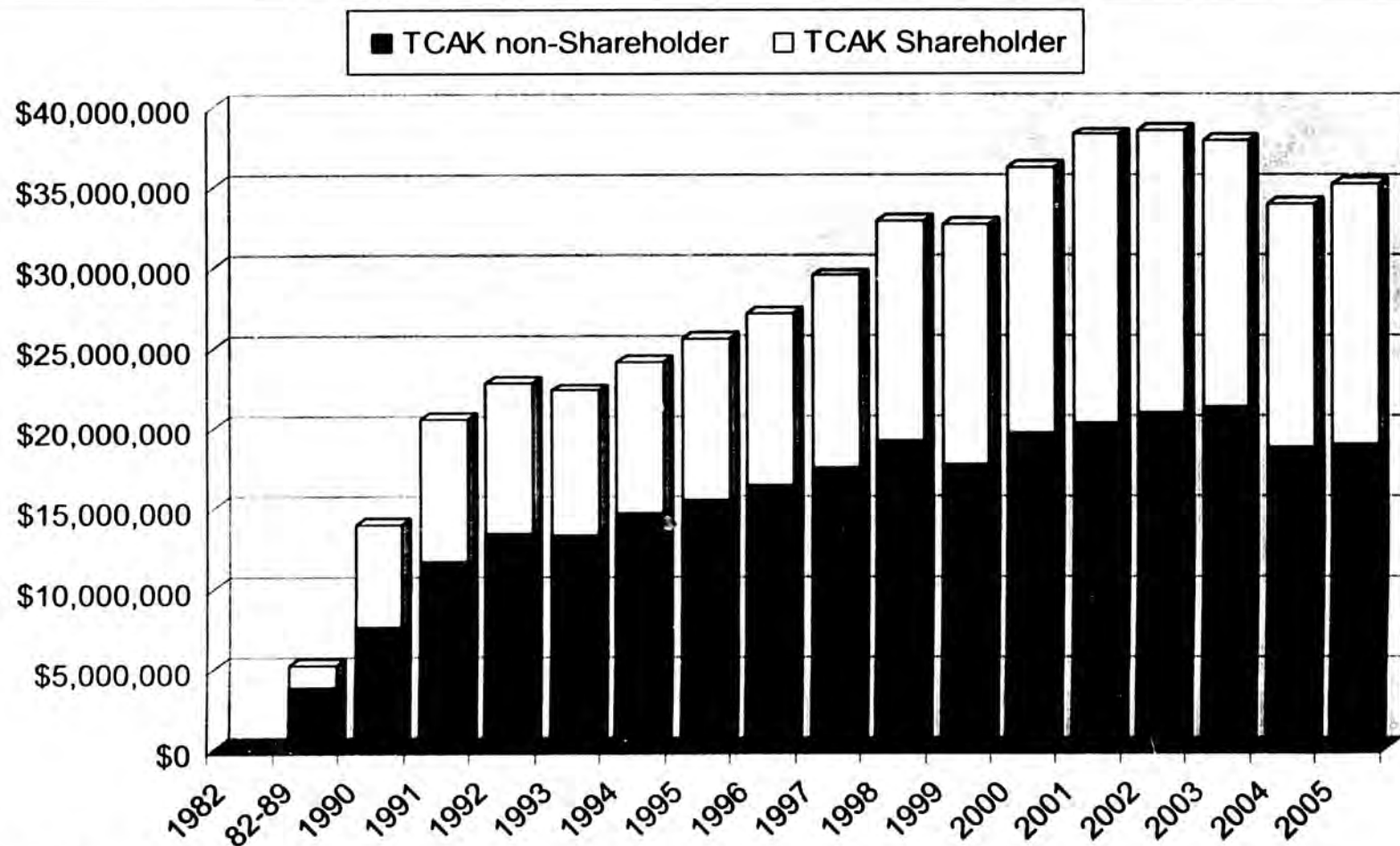
Total Workforce	464
NANA Shareholders	56%

\$42M in wages annually (including NANA JV contractors)



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Teck Cominco Alaska Wages

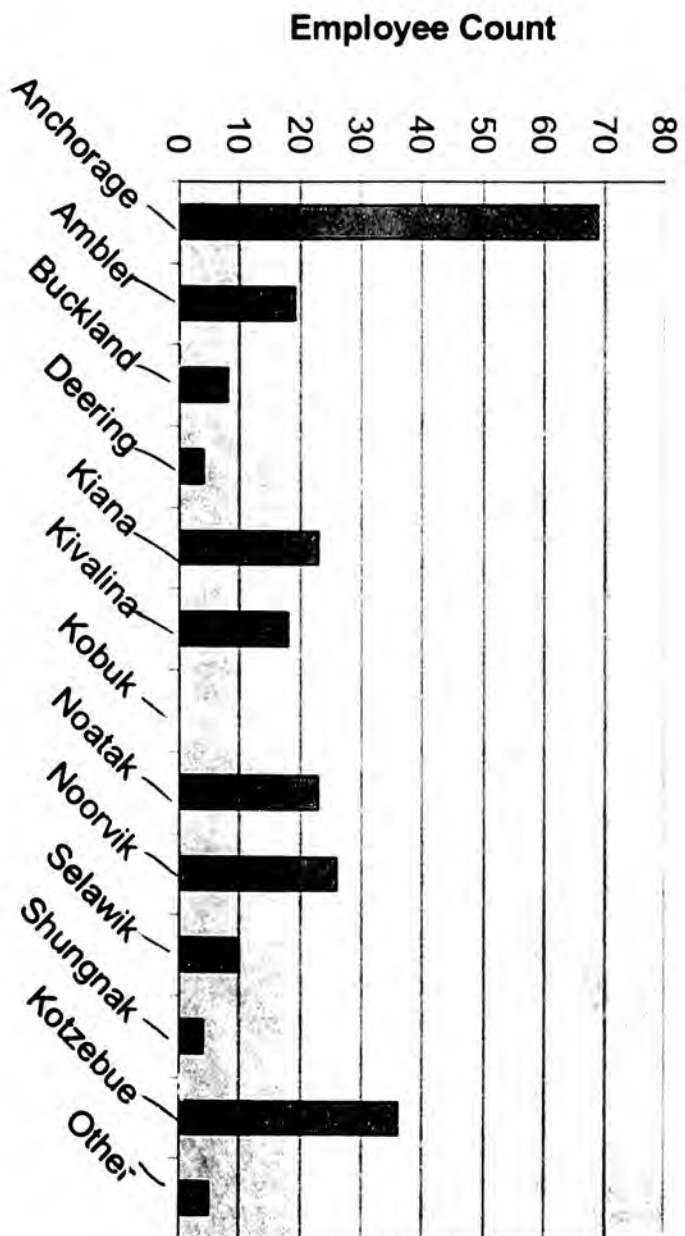


Total = \$475 million thru 2006 (excludes contractors)

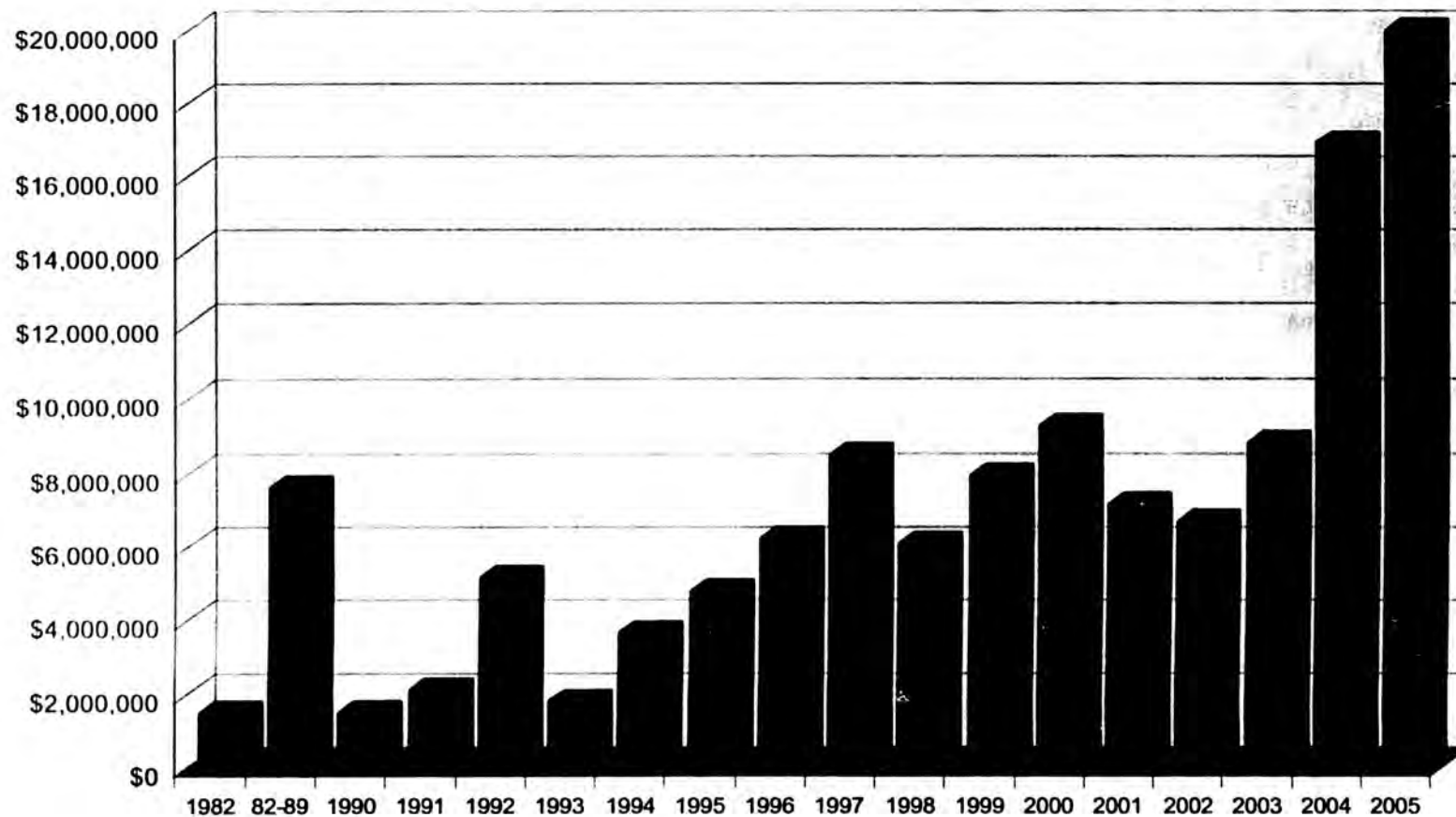


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Shareholder Residence



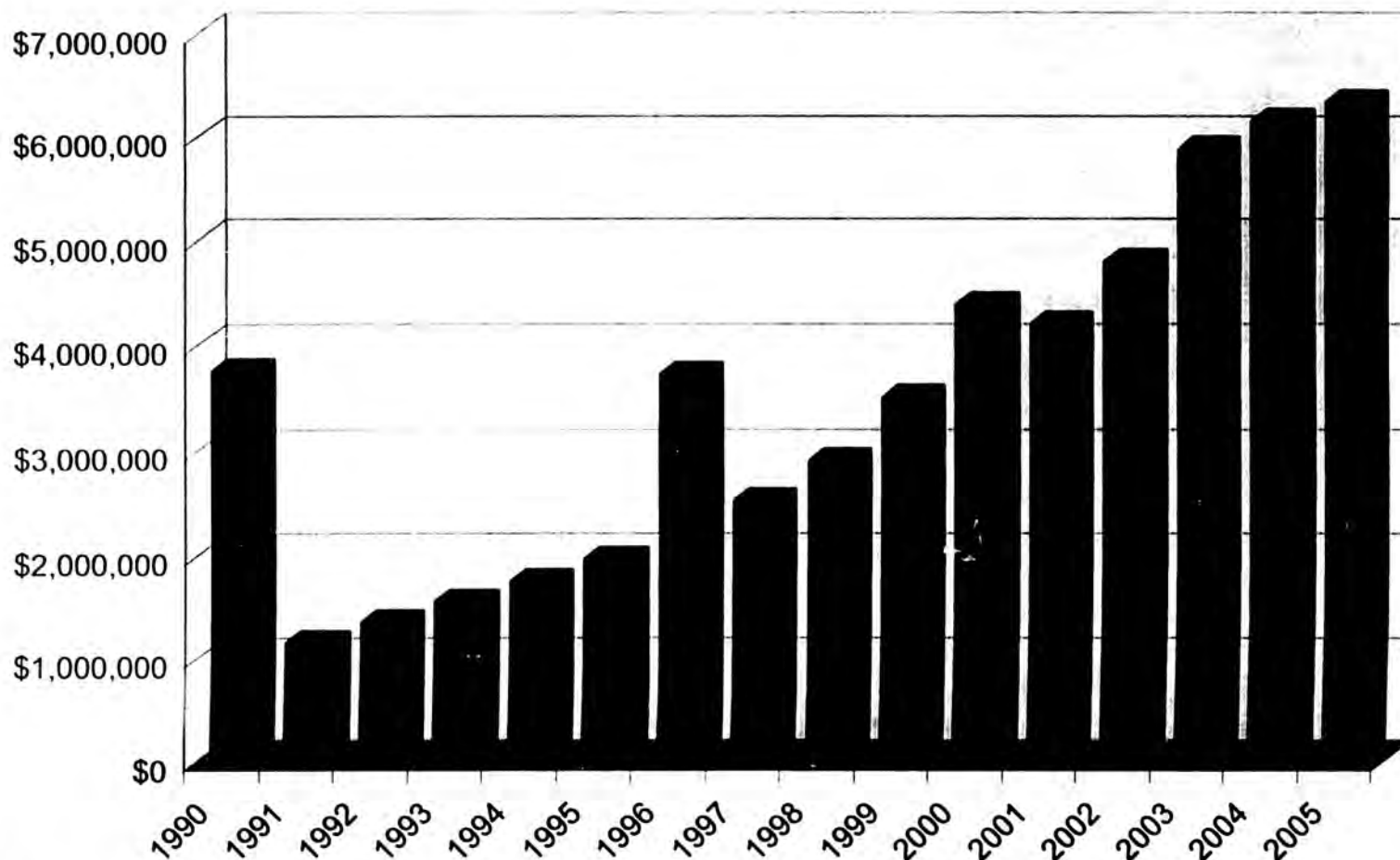
NANA Royalty Payments



Total = \$126 million thru 2005

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Northwest Arctic Borough PILT Payments



Total = \$56 million thru 2005



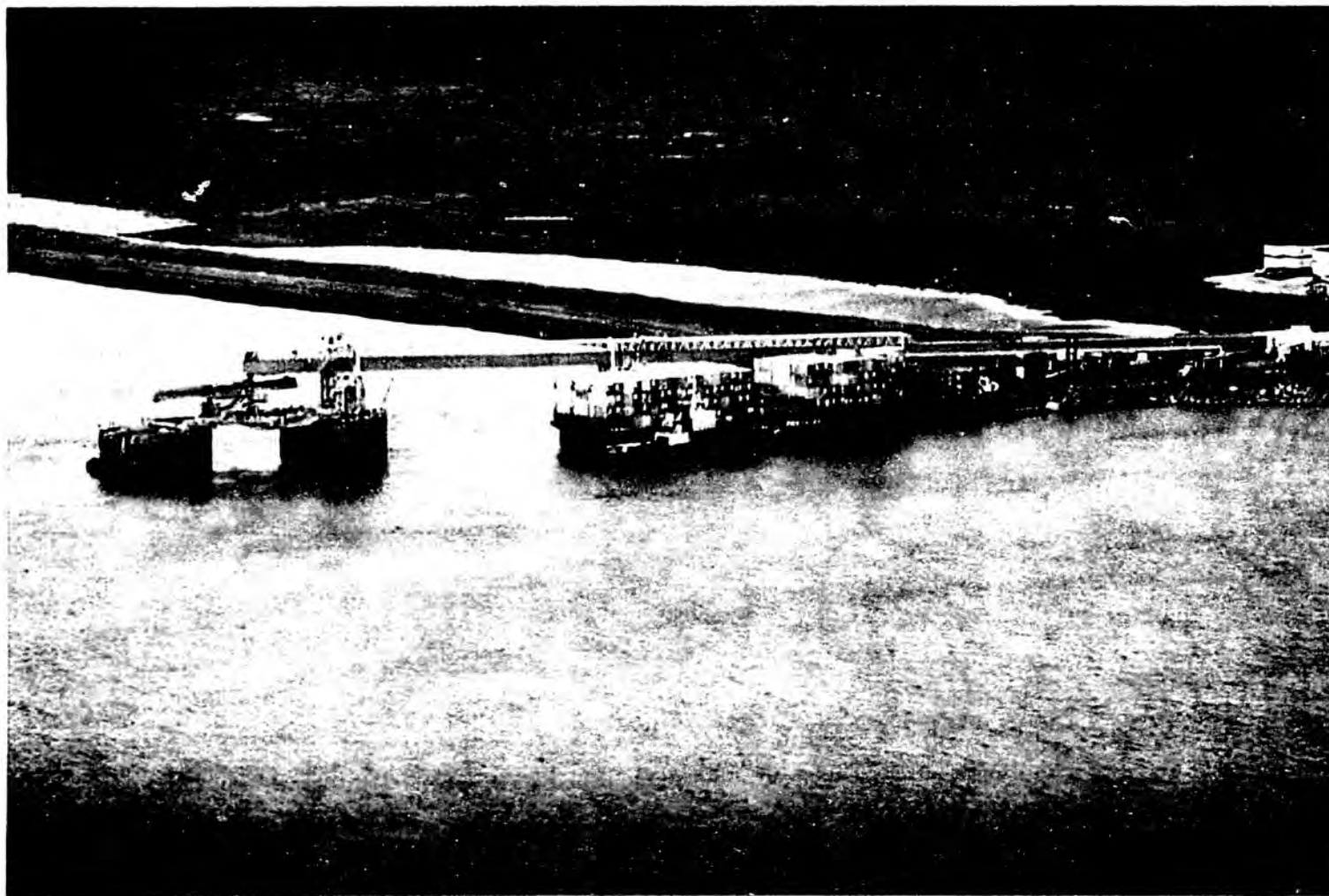
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Alaska Industrial Development and Export Authority

- Total AIDEA investment ----- \$265,000,000
- Interest paid by TCAK ----- \$190,000,000
- Debt paid by TCAK ----- \$ 15,500,000
- Excess tonnage charges ----- \$ 23,000,000
- Total paid to AIDEA thru 2005 -- \$288,000,000

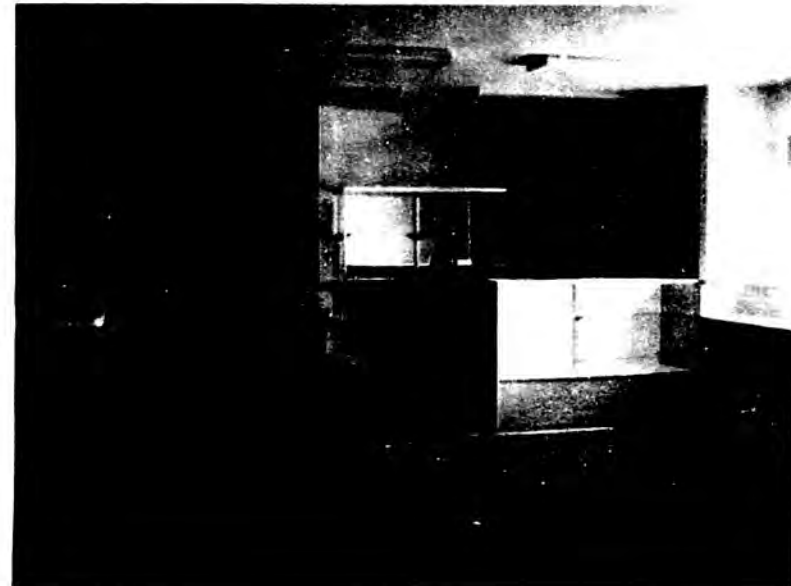


THANK YOU



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Sulanich Arts Center



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Sulanich Arts Center

- The Northwest Arctic Borough and Chukchi College received a grant from HUD for \$395,000
- NANA donated the use of an old retail center
- Maniilaq Association will provide utility costs
- The borough provides two full time employees (an administrator and a development specialist)
- During renovation a problem occurred with the water and sewer. The Rasmusson foundation and the borough worked together to repair the problems for an additional \$106,000.
- Center to open June 2007



SCOMM

146:12

At this time we will call the meeting to order.

Let the record reflect the time is 11:45 am on Tuesday, January, 2008.

Let the record show that

- ☐ Representative Gatto
- ☐ Representative Lynn
- ☐ Representative Keller
- ☐ Representative Johansen
- ☐ Representative Doll
- ☐ Representative Doogan
- ☐ And myself Representative Neuman

and that we have a quorum.

(Let the record also reflect that _____ has been excused from the committee meeting today.)

Today we will be hearing a Presentation on:

Pacific North West Economic Region

Presented by Matt Morison (Executive Dir.),

and see Note Sheet

Before you start please, state your name for the record.

Does the committee have any questions?

Thank You.

This committee is adjourned

PNWER Tourism Program Overview

On September 30th, 2007 the Pacific NorthWest Economic Region's (PNWER) Tourism/2010 Olympics Program completed its first fiscal year of operations. The program is one of five within the organization, and was established through the direct support of the Provinces of Alberta and British Columbia, and the States of Idaho, Oregon and Washington. Other PNWER jurisdictions, including Alaska, Montana and Yukon, have also been invited to participate as well. This report shares the work of the program to date, projects in progress, and goals for the coming year.

The initial idea of a regional tourism program grew out of the ongoing work of the PNWER Tourism working group with the added impetus of the upcoming 2010 Winter Olympics in Vancouver, British Columbia. The first steps toward establishing a program area were taken at PNWER's 2004 Annual Summit in Victoria, BC with the establishment of a 2010 Olympics Coordinating Council, and reaffirmed at the 2005 meetings in Seattle, Washington. Through an initial challenge grant concept brought forth by Washington State and British Columbia, the funded program area within PNWER was finally initiated on October 1, 2006.

The past year's work has focused on four major areas:

- Building a comprehensive marketing and communications program to maximize visibility of the region before, during, and after the 2010 Olympics;
- Working with the federal, state and provincial governments to address concerns raised and build solutions vis-à-vis the Western Hemisphere Travel Initiative (WHTI);
- Securing and developing financial support for the program in both the private and public sectors; and
- Identify further areas of cooperation for regional stakeholders in tourism policy and projects.

As the program has developed, goals and deliverables have been adjusted.

Highlights:

2010 Olympics-

- Development of comprehensive business plan covering initial media, communications and outreach strategy to establish the region as a site for pre-Olympic sports training;
- Building and initial deployment of the TerraNW.org website as a database of regional sports venues;
- Signed Memorandum Of Understanding with the Province of British Columbia and 2010LegaciesNow establishing a formalized partnership strengthening the region's support of teams in preparations for the Olympics;
- Directly met with international ski and snowboard teams, as well as the president and chairwoman of the International Ski Federation to invite them to start training in the region.

Western Hemisphere Travel Initiative (WHTI)-

- Coordinated meetings of top level US and Canadian Homeland Security officials, including direct meetings between the Secretary of Homeland Security (US) and Minister of Public Safety (Canada).
- Supported the establishment and continue to support the BC-Washington Drivers license pilot project.
- Met with US congressional leaders in Washington, DC and locally to directly explain the need for improvements in implementation and scheduling around the WHTI.

Partnerships and Sponsorship-

- Matched British Columbia and Washington State's initial investments with those of Alberta, Idaho and Oregon, providing seed funding for the program
- Developed initial sponsorship program for the TerraNW program which is now being introduced to potential private sector sponsors
- Established partnership with the International Ski Federation with funding commitments of \$300,000 per year for global ski teams training in our region.¹

Further Areas of Cooperation-

- Continue to work with private and public sector stakeholders on the development of a NorPass regional rail and sail ticket concept, including inland travel in long term plan
- Supported initial work on the development of a 2010 sustainability showcase

While there was a large amount of work done in all areas of the program, the strongest focus was on WHTI issues and preparations for the 2010 Olympics.

2010 Olympics

The largest portion of work for the PNWER Tourism/2010 Olympics Program in its first fiscal year focused on preparations for the 2010 Winter Olympics. This included the development of a comprehensive business plan, a new brand for this area, a new website, an initial media strategy, a promotional program around training sites for the Winter Games, and the introduction of beneficial partnerships for the region.

¹ This partnership will be announced publicly in October 2008, while specifics are being finalized, this is the commitment as of October 1, 2007.

Business Plan

In the first fiscal quarter, a significant amount of time and energy was devoted to developing a comprehensive business plan for the marketing and outreach of the Pacific Northwest to international winter sports teams as a destination for pre-Olympic training. The business plan also includes a discussion of how to leverage training done in the region to maximize media interest and opportunities prior to, during, and after the 2010 Olympics.

Highlights

- The business plan was shared with all participating jurisdictions for review and comment, and execution began late in the first quarter. Initial work focused on the development of what has now become the TerraNW.org website.
- In the second quarter, PNWER Staff directly began marketing the region to international ski and snowboard teams, as well as began building a direct relationship with the International Ski Federation (FIS) and their leadership.
- Third quarter work moved further into developing the private sector sponsorship possibilities of the program, and was significantly impacted by the preparations for the PNWER annual summit in Anchorage Alaska.
- The final quarter of the year has been spent working with individual states and provinces, and their constituent venues to increase participation in the program. Each area will be elaborated on later in this report.

Challenges and Opportunities

The original business plan covered a large amount of the operational aspects of the Olympics Outreach program, now called TerraNW. It did not go into the depth required on long term private sector investment in the program, nor on the true definition of where TerraNW left off and other projects begin. The financial projections were also based on a limited dataset, as many first year business plans are, and will need to be updated now that the program is moving into the second fiscal year. PNWER believes that the Business Plan should be a living document, and through the course of the year consistently revisited. We plan to give this a higher priority this year.

This document will also be added to the information included in the business plan, and will be directly compared to initial goals and outcomes, to produce an updated version of the plan in the near future. One major area of improvement for the program in the coming year is to increase ongoing **internal stakeholder communications** through established quarterly meetings as well as ad-hoc meetings and periodic updates.

TerraNW (Venues Marketing and Website)

The establishment of TerraNW as a website and a major program area was a large part of the second and third quarters. As laid out in the TerraNW business plan and discussed at the PNWER winter meeting in November 2006, the build out of the TerraNW website began the final weeks of November. In order to decrease costs, a choice was made to build the platform in-house. The platform was built by PNWER's Tourism/Program Manager, Ian Burkheimer, based on another system he built which recently won a national (US) award and had a strong ability to adapt to the needs of the Terra NW site.

Another area of the marketing focus was the establishment of a name and brand for the program. Initial interactions with international ski and snowboard teams showed that continuing with the "Pacific NorthWest Economic Region, Tourism/2010 Program" was not an effective way to reach the initially identified audience of national sports teams, coaches, and officials. PNWER consulted with a third party to develop initial imagery and potential names for the program, with TerraNW finally agreed upon.

The third major area of work for the TerraNW brand development was to start introducing the region directly to ski and snowboard teams from around the world that may be taking part in the 2010 Olympics. This was done through a personal presence by TerraNW staff at three world championship events and a World Cup. Access to coaches and athletes was very high, as TerraNW was seen as an active partner with the International Ski Federation (see below) and has maintained contact with a number of teams in the interim.

Highlights

- TerraNW.org website built and tested into third quarter and has been "soft launched", with 57 regional snow sports venues currently having visibility on the website
- Direct meetings with teams from more than thirty countries initiating relationships to convey invitations and information about training opportunities in the region
- Established Memorandum of Understanding (Appendix A) with the Province of British Columbia and 2010 LegaciesNow, denoting the preference for British Columbia, Alberta, and the other PNWER Tourism Program Participants as training sites for teams coming to train for the 2010 Olympics
- Met with community, venue and tourism leaders in Washington, Oregon, and Idaho to discuss opportunities and engage venues in preparing to host teams.
- Building of a sponsorship offering giving visibility to private sector sponsors throughout the region, as well in targeted international markets (Appendix B).
- Strong Relationships with US Skiing and Snowboarding and Canadian Snowsports Association, including facilitation of cooperative training for the US Snowboarding team with the Canadian team in Alberta's Canada Olympic Park.

Challenges and Opportunities

The TerraNW project is an extremely ambitious program, with a very large number of relationships to manage, including provincial/state tourism offices, over 57 venues, over 40 teams, and other potential private sector investors. This has led to a very large allocation of limited time for the program's one staff member and interns. One area that has lagged is the engagement of communities as a means to support incoming teams as they come to train. A particular focus for the first quarter of the year will be to meet directly with Alberta, as well as further develop the relationship with British Columbia, particularly TourismBC.

We plan to develop a more defined process for managing relationships with teams and venues, potentially asking jurisdictions to take a larger direct role in communicating with teams and/or working with communities and venues to offer some pre-built options for incoming teams.

One area that we continue to find of interest, is the need to help teams understand the geographic conditions of the Vancouver/Whistler Corridor, including housing information for their preparations for the 2010 Games. We will look at the possibility of building some information pages on the website, or directing interested teams to the appropriate partner areas.

The TerraNW area has the potential to strongly appeal to certain private sector interests. While a sponsorship program has been developed, PNWER will develop a five to seven member private sector advisory board to help strengthen the business case, as well as facilitate the introduction of sponsorships opportunities over the coming year.

FIS Partnership

Through PNWER's proactive relationship with the Canadian Snowsports Association, strong push for regional inclusion in the 2010 Olympics, and the development of a regional snow sports infrastructure, we were approached to become partners in a program supporting training for teams from small nations in preparations for the Games. While there was a small pilot project along these lines for the 2002 Salt Lake Olympics, this is the first sustained program of its type in the world. The FIS Small Nations Athletes Program is a partnership between the International Ski Federation (FIS), Canadian Snowsports Association, 2010LegaciesNow and PNWER. The partnership will be funded through the FIS at approximately \$300,000 per year for the 2007-2008, 2008-2009 and 2009-2010 winter seasons to subsidize training throughout those jurisdictions participating in the Tourism Program.

While the official announcement of this program will take place in the first quarter of fiscal 2007/08, PNWER staff has been meeting with the other partners to develop the methodology to implement this program. While more details will be forthcoming, already an initial expression interest was distributed to venues in the PNWER region, with interest from at least one venue in each jurisdiction to take part in the program. This was coupled with the FIS sending an invitation letter to 51 National Ski Federations

inviting them to submit their interest in the program. Follow-up will occur in October and November 2007, with potential first arrivals for the program in January 2008.

Other Olympics related work

Media/Visitors Center

The idea of a regional cooperative media or visitors center in Vancouver during the 2010 Winter Olympics has been a point of "off and on" discussion for a number of years. During the third and fourth quarter of this fiscal year, PNWER initiated more in-depth discussion on this project. Through a series of conference calls and other consultation, an initial set of layout options were produced for the 2007 Annual Summit. These are very preliminary space studies, and will provide the basis for further work on the project.

Current consensus is leaning strongly toward a purely media focused center, and one of the goals for the first quarter 2007/08 is to finalize a decision in this area, so that planning may continue on a more streamlined pace. The center will focus on increasing media interest in the Pacific Northwest to drive media stories about the entire region in both the sports vertical and wider press. This project will be discussed in depth with TourismBC and other partners in British Columbia in the near future to examine ways to cooperate in this field and general media outreach.

Media Strategy

A large part of the media strategy around the Olympics is outlined in the business plan. Areas of cooperation that are currently in discussion are the production of regional story threads, or ideas that relate Vancouver with the rest of the region. This ultimately will likely include b-roll video footage, pre-written story ideas, background information sheets, and, potentially, outreach pieces for private business owners in the region with talking points concerning the Games. These ideas will be developed more fully in the second and third quarter of 2007/08. Current strategy includes the development of a media specific committee within the Tourism Program Framework.

Sustainability Showcase

The sustainability showcase is an early stage project that looks at a means to showcase to press and visitors at the 2010 Olympics the development of sustainability practices across industries, including tourism, regional best practice, and technologies. PNWER is working to build an organizational and funding partnership around this area.

Western Hemisphere Travel Initiative/Border Crossing

The Western Hemisphere Travel (WHTI) is seen as a major potential impediment to tourism, trade and cultural developments across the US/Canadian frontier. The most contentious issue in the WHTI is the requirement of a valid passport to cross the international border. This replaces the older system where a declaration of citizenship would often suffice with only a driver's license and/or birth certificate as proof of identity.

The WHTI was passed by the US Congress in response to recommendations from the 9/11 Commission, however implementation has been an ongoing moving target. PNWER has worked with the JS Congressional Delegations, as well as other interest groups, to push for a workable, realistic pathway to implementation. This has included opportunities for legislative leaders from PNWER's American and Canadian jurisdictions to meet directly with Congressional Members and Staff in Washington, DC.

The first half of the fiscal year was strongly focused on communicating to the federal government the need for clearer, more defined traveler communications surrounding WHTI implementation. This included one meeting with the Secretary of Homeland Security in Seattle, as well as one the prior year in Edmonton. While sensible implementation and public information around the WHTI were the initial goals for support by PNWER, as things developed on the ground, PNWER became increasingly involved in the BC-Washington State Enhanced Drivers license initiative.

Enhanced Drivers License(EDL)

The Enhanced Drivers license concept was an idea initiated at the joint cabinet meeting between Washington's Governor Gregoire and BC's Premier Campbell. The concept is to develop an enhanced drivers license that not only denotes identity, as is the currently the case, but also denotes citizenship in a secure and usable document. While there was strong initial skepticism at the viability of the concept, Washington's Governor and Department of Licensing Director Liz Luce produced a compelling plan to develop the project.

PNWER has played a strong supporting role in this project, as there is a very large immediate and long term benefit for the region. This has included educating state legislators about the opportunity for Washington and the Northwest to be a leader in this area, working with the state to organize a joint memorandum of understanding with the Department of Homeland Security, and supporting the public outreach for the new identity card.

While PNWER continues to press for a slower, more measured implementation of the WHTI passport restrictions, we are also very strongly supporting the further development of the BC-Washington Pilot. We will work to keep PNWER stakeholders apprised of this project, and are very happy to facilitate preparations by other states and provinces to support, and eventually take part in, this program.

Highlights:

- Washington State Enhanced Drivers License enabling legislation was passed during the 2007 session in Olympia, with a letter campaign organized by PNWER
- The EDL will be recognized by the US Department of Homeland Security as being valid at **ALL** US ports of entry.
- EDL on target to be implemented on a pilot basis starting January 3, 2008.
- British Columbia is working on counterpart ID and policies for Canadian trial
- The ID will cost \$15 more than a standard license and be voluntary for those interested.

Note: While the ID was originally thought of as a pilot only on a few border crossings, current homeland security rules strongly indicate that it will be accepted all other land border crossings as well.

Other Projects

NORPASS

In 2002, at a PNWER Summit a group of public and private organizations² proposed to create a pilot *NorPass Rail and Sail (NorPass)* program. Early discussions were held around the concept of a joint-marketing pass for walk on only, bi-national travel between WA, BC, and Alaska. NorPass was conceived as a "Eurail"-type pass (<http://www.eurail.com/>) that could include the state ferry systems, BC ferries, and possibly the Alaska Railroad and the Victoria Clipper.

The vision of NorPass would provide convenient and flexible travel options for tourists planning an adventurous trip to the Pacific Northwest. Tourists could start in Seattle and travel north using the ferry system through the world's most spectacular coastal waterway, stopping at interesting ports at their discretion, being as economical or luxurious as they like. They could arrive in Alaska and continue to explore via the Alaska Rail system (optional).

PNWER has been facilitating the development of this product through a number of conference calls and meetings this past year. Currently there are proposals for the Alaska segment of partnership in development, and BC Ferries are developing their own parts of the program. As NorPass is seen as a gateway product for the region, we have also invited inland transportation partners including Amtrak Cascades, and Rocky Mountaineer to take part in the conference calls.

Current timelines in the works make a pilot in the spring of 2008 a possibility. PNWER will continue to host meetings approximately twice a quarter to facilitate the further development of the NorPass product.

NOTE: NorPass continues to be the working name, however a different name may be used once the product is ready for market.

Summary and outlook

The first year of the PNWER Tourism Program was a very full one, which included the initiation of a number of projects, the development of a business plan for parts of the program, and initial work on further project areas. There are a number of "successes in progress" including the first regional investment specifically in tourism for the region, the initial development of the TerraNW website, first

² Representatives from the Alaska DOT, BC Ferries, Victoria Clipper, WA State Ferry System, Alaska State Ferry System, and the Pacific Northwest Economic Region (PNWER)

meetings on a possible regional media/visitors center for the 2010 Games, and the commitment from British Columbia and Alaska to initiate pilots on the NorPass program. This has required PNWER's staff to expend a large amount of energy and resources moving these programs forward, and has made it readily apparent that further, focused investment in the program is necessary to maximize success.

The coming year will see continued work put into the projects in development, with a focus on further comprehensive business planning and asking additional commitment to programs by private and public stakeholders. With the 2010 Olympics only two years away, we will be asking stakeholders to increase their commitment to program areas they see as important, with corresponding allocation of PNWER's resources to those areas. PNWER does not foresee launching any new projects in the coming year, but will support smaller new projects, with primary focus on maximizing value of those already in place.



Pacific NorthWest Economic Region

Regional Workforce Highlights January 15, 2008

Population & Aging Workforce

- Population is increasing in each of the PNWER states and provinces; however the availability of data on the source of these increases (natural versus migration) varies by jurisdiction.
- Aging populations, due to west-ward migration and/or the aging of existing population is forecasted for each state and province in the PNWER region.
- Each state and province has provided different information on their aging workforce, at varying levels of detail, making comparison difficult. The issues associated with aging populations are framed under two primary issues; 1) the stress on employers to fill replacement openings and 2) the stress a greater share of the population ages 65 and over places on particular sectors, such as healthcare for services.
 - British Columbia forecasts a tripling of their population ages 65 and older by 2030; representing 45,489 individuals in 2006 or 7% of their total population, compared to 134,311 by 2030 (a 195% percent increase or 16% of their total population).
 - In Oregon, a large number of job openings are expected due to people retiring or leaving their occupations for other reasons. Between 2004 and 2014, the state projects a total of 419,000 openings will be replacement openings. Additionally the state projects the share of all employees in Oregon retiring each year will increase from 1.8 percent in 2000 to its peak of approximately 2.3 percent in 2015.
 - Montana has identified strategies to address increased retiree populations and net out migration of young people, including the identification of labor pools from other parts of the US that could easily translate their skill sets from declining industries (auto manufacturing) to high demand occupations and industries in the state.

Employment & Industry Sectors

- Seasonally adjusted unemployment rates among PNWER jurisdictions spans from 2.7 percent in Idaho and Montana; 5.6 percent in the Yukon and 6.4 percent in Alaska.
- The seasonally adjusted unemployment rate for the United States and Canada in November 2007 was 5 percent and 5.9 percent respectively.

The Pacific NorthWest Economic Region gratefully acknowledges the Verizon Foundation for their support of the Workforce Program and the time required to compile this summary and the supporting report.

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- There is a notable preference in labor market data and profiles to focus on high-demand, high-wage jobs; versus jobs in sectors such as leisure and hospitality that have large numbers of openings, but are generally low-wage jobs.
- Seasonal declines in industry sectors may also, if tracked could provide a temporary labor pool to the region – such as current seasonal declines in construction in Alaska.
- Across the region the following industries are projected to grow over the long-term, creating a significant number of job openings; including Health care & Education services; Professional and Business Services and Leisure & Hospitality.
- PNWER US jurisdictions, with the exception of Alaska and Washington State are projecting continuing declines in the construction industry.
- Alberta and Alaska lead the PNWER jurisdictions in growth in Natural Resources and Mining and Oil and Gas.
- With the exception of Washington State, Manufacturing as a major industry sector is expected to decline in US most jurisdictions, although this sector will be impacted by retirees and replacement openings.

Occupational Demand

Identified demand occupations across the Pacific Northwest number into the hundreds; however there were a few specific data sets that demonstrated regional trends.

- Healthcare occupations in-demand everywhere, in large part due to projections surrounding aging populations.
- Computer and Information Systems-related occupations appeared on high-demand, high-wage lists in Alaska, Idaho, Washington, British Columbia and Alberta.
- Data on occupational demand varied between states and provinces. Occupational forecasts are available in all of the states and provinces, however date ranges vary. In addition, the level of specificity regarding these projections varies among jurisdictions.

Educational Attainment & Workforce Demand

- 64% of Alaska job openings between 2004 and 2014 will require only some type of on-the-job-training
- In 2006, 6 out of 10 occupations in Oregon required only some on-the-job training; however 60% of jobs paying \$45,000+ annually require a bachelor's degree.
- In Washington State, 24% of job openings in 2007 required a high school diploma, followed by 18% of openings requiring a bachelor's degree.

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- Between 2006 and 2011, 33.9 percent of Alberta's employment growth will occur in occupations requiring College or Apprenticeship, followed by 27 percent in requiring a secondary school and/or occupation-specific training.
- In 2005, 64% of British Columbia's labor force had a university degree or some post-secondary education; however projected job openings between 2005 and 2015, 74% will require a university degree or some post-secondary education.

High School Graduation & Dropouts

Data for the 2005-06 school year was immediately available online for Washington, Oregon and Canada. In order to complete this analysis, additional data should be sought from British Columbia, Alberta, Idaho, Montana and Alaska for the same timeframe.

- Comparing Washington to Oregon, given the data available, each state had a relatively low drop out rate in 2005-06 and show progress from previous years in reducing that rate. Oregon's dropout rate was 4.1%, compared to Washington's 5.1%.
- Of high concern was the Alberta statistics – averaging about a 10% annual dropout rate. Youth in rural areas and small towns were much more likely to drop-out of high school – with a reported 20% average drop-out rate. Understandably, Alberta's current economic growth is driving this, as high school dropouts have a better chance of finding work in the province, compared to others; however the long-term implications for these individuals and the province should be taken into consideration.

Workforce Investment Act: Key Findings & Observations

- Alaska has an exemption from reporting Workforce Investment Act outcomes; however this waiver demonstrates a common problem across all US jurisdictions – a significant reduction of federal WIA funding to support the delivery of services to adults, youth and dislocated workers and in Alaska's case the inability to track, measure and report outcomes.
- Strategic plans required for states to file with the US Department of Labor may be of assistance in regional strategic planning, given that it outlines the states vision and goals for their workforce.
- Montana and Idaho both consolidated their workforce development systems, rather than having county or regional Workforce Development Council's; both of the states oversee, monitor and administer funds from a centralized state office to the one-stop centers that deliver services at the local level. As Montana indicates in their state WIA report the cost savings of this consolidation has been significant; however no information was provided on effectiveness indicators. Given funding cuts in this system, states may increasingly be required to look at cost savings in administrative functions.
- One other data set that may require closer scrutiny is the level of service provided by WIA to varying populations.

ENERGY SOLUTIONS FOR OUR FUTURE

Upcoming Events

*Pacific NorthWest
Economic Region*

Energy Horizon



Ministry of Energy, Mines
and Petroleum Resources

Alberta Energy



Pacific NorthWest Economic Region

Pacific NW Regional Bi-National Energy Planning Initiative

- Over 400 stakeholders met in Calgary in 2003 and provided clear guidance that Bi-national energy planning was needed. In particular these areas were of concern:
- Stove pipe planning across fuel types with differing data sets.
- Data sharing on resource availability – supply / demand of gas, petroleum, electricity
- Analysis of the feasibility of moving megawatts vs. BTU's
- Least cost corridor planning
- Unified permitting across jurisdictions



Pacific NorthWest Economic Region

Integrated Resource Planning key to our Region's Future

What is and Integrated resource plan?

Integrated Resource Planning is an assessment of demand-side and supply-side resources, evaluated under consistent assumptions, to produce a cost-effective resource mix that meets expected short-term and long-term demand. The goals of the IRP are to produce a best-cost portfolio of supply side and demand side management alternatives to meet customer requirements of reliability under given constraints, to reduce costs for customers, to help diversify energy supply mix, and to improve modeling of demand, supply, and conservation.



Pacific NorthWest Economic Region

Mapping Region's Massive Energy Infrastructure Build out

- A loaned executive from TransCanada Corporation worked with PNWER to MAP regions' massive energy Infrastructure build out – slated for the next ten years.
- Over \$55 Billion in new projects in region are in process. These are just projects of \$100 million or more in value.
- Audit of projects identifies crucial shortages of skilled workers to complete projects announced.

Pacific NorthWest Economic Region

Proposed Major Energy and Infrastructure Projects in the Pacific North West

Paul Northridge Elementary Region
2100 Madison Way, Suite 442, Berkeley, Washington 98112
909.640.1400, Fax: 909.640.1401, E-mail: paul@northridge.k12.wa.us

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The image displays a sequence of ten vertical film strips, each containing a different frame from a movie. The frames are arranged in a row, showing a progression of a scene. The scenes are dark and appear to be underwater or in a night-time setting. The frames show a person in various poses, including a person's face and a person's body in a dark environment. The film strips are labeled with numbers 1 through 10 at the bottom.

1. Name of the person or organization: <u>John Doe</u> 2. Address: <u>123 Main St, New York, NY 10001</u> 3. Date of birth: <u>01/01/1900</u> 4. Date of death: <u>12/31/1999</u> 5. Date of entry: <u>01/01/1900</u> 6. Date of exit: <u>12/31/1999</u> 7. Date of last update: <u>01/01/1900</u> 8. Date of next update: <u>12/31/1999</u> 9. Date of last review: <u>01/01/1900</u> 10. Date of next review: <u>12/31/1999</u> 11. Date of last audit: <u>01/01/1900</u> 12. Date of next audit: <u>12/31/1999</u> 13. Date of last inspection: <u>01/01/1900</u> 14. Date of next inspection: <u>12/31/1999</u> 15. Date of last check: <u>01/01/1900</u> 16. Date of next check: <u>12/31/1999</u> 17. Date of last test: <u>01/01/1900</u> 18. Date of next test: <u>12/31/1999</u> 19. Date of last evaluation: <u>01/01/1900</u> 20. Date of next evaluation: <u>12/31/1999</u> 21. Date of last assessment: <u>01/01/1900</u> 22. Date of next assessment: <u>12/31/1999</u> 23. Date of last analysis: <u>01/01/1900</u> 24. 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Map Compliments of
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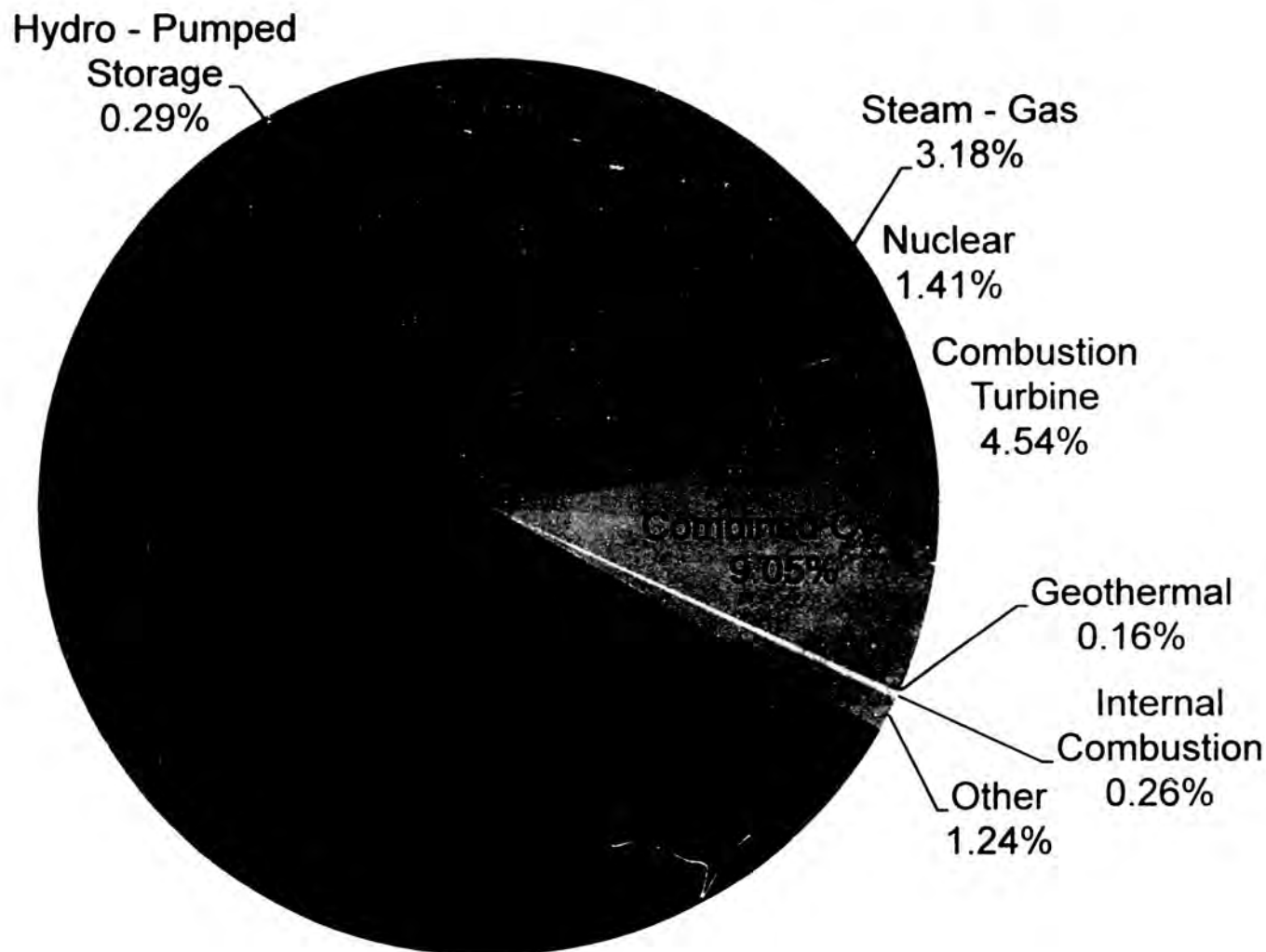


Pacific NorthWest Economic Region

PNWER's Energy Horizon created 2007

- Region's Energy Chairs see need to have vision of regions future of IRPs, announced projects vs. completed projects and the ability to have what if? Planning tool for region.
- PNWER forms Energy Horizon to look at that future with the help of Alberta Ministry of Energy, BC Ministry of Energy and Mines, US Department of Energy, and Canadian Consulate Seattle
- Initial combined view of regions current IRP's completed

Existing Northwest Generating Capability as of 1/2005



* Data from Western Electricity Coordinating Council