

# Wrangell Visitor Industry

## By the Numbers 2019



For the Wrangell Convention and  
Visitors Bureau

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**Rain Coast Data**



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## Visitor Overview

Wrangell is a distinct and attractive visitor destination that is growing in popularity as a small cruise ship destination. Located at the tip of Wrangell Island across from the mouth of the Stikine River, the community is rich in wildlife, culture and history. Unlike other Southeast Alaska communities that have a more mature visitor industry, Wrangell's charm includes a "working waterfront" district rather than souvenir and diamond-focused shops.

Wrangell has unique opportunities for nature-based tours and wildlife viewing. The most popular visitor destination is Anan Creek, known for its world-class bear viewing. Anan—located 30 miles southeast of Wrangell—is a popular place to watch the grizzly and black bears that congregate between early July and late August to take advantage of Southeast's largest pink salmon spawning event. Other popular visitor activities in Wrangell include visits to the Stikine-Leconte Wilderness, Chief Shakes Island, and Petroglyph Beach State Historic Park, which has the highest concentration of rock engravings in Southeast Alaska.

In the summer of 2018, an estimated 20,019 tourists visited Wrangell. This represents a 6% increase over 2017. These tourists spent an estimated \$5.1 million in Wrangell that summer. In 2019, 32% more summer visitors arrived than in 2018, based on preliminary estimates.



Photo of Wrangell by Robert E. Johnson

## Employment

Tourism is an economic driver in the community. It is the second largest private sector industry (after maritime, which includes seafood). In 2018, visitor industry employment made up 9% of all private sector employment in Wrangell, accounting for 106 annual average jobs with associated workforce

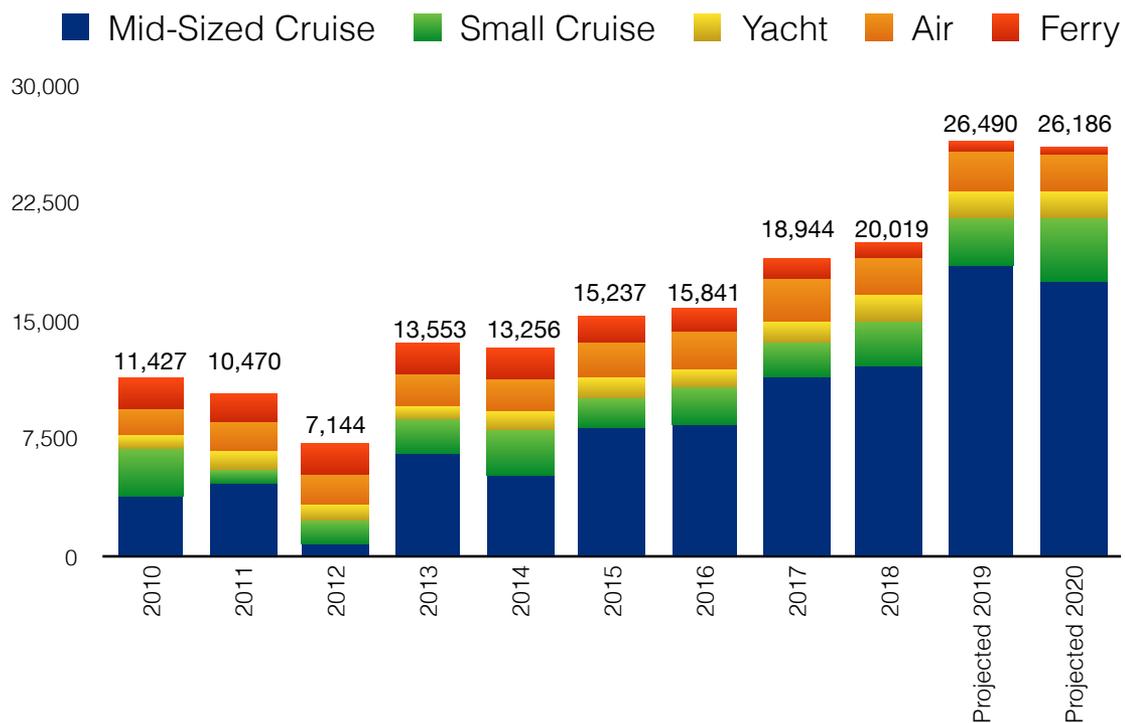
earnings of \$2.9 million.<sup>1</sup> The visitor industry accounted for 6% of total Wrangell workforce earnings in 2018.

This sector is smaller in Wrangell than the region as a whole; the visitor industry represents 18% of all jobs and 11% of all employment earnings for Southeast Alaska, versus 9% and 6% respectively for Wrangell.<sup>2</sup> The Wrangell visitor sector is also growing much more slowly than it is in the region, seeing no employment growth between 2014 and 2017.

That being said, the Wrangell visitor sector appears to finally be growing. Between 2017 and 2018, visitor industry wages grew by 20%, from \$2.4 million to \$2.9 million and the community increased tourism jobs by 6%. Once the numbers are finalized for 2019, a significant increase in jobs and wages is projected.

## Change in the Visitor Industry

Total Wrangell Summer Tourists, 2010 to 2020



<sup>1</sup> Since annual average employment measures monthly jobs on an annual basis, a visitor industry job that lasts three months counts as one-quarter of an annual average job. Therefore total people employed by the visitor industry last year is a much higher number.

<sup>2</sup> For a regional overview of the visitor industry, please see Southeast Alaska by the Numbers 2019 by Rain Coast Data.

After reaching a low point in 2012 of 7,144 tourists, the total number of visitors coming to Wrangell in the summer significantly increased over the past six years, mirroring regional trends. A total of 26,490 tourists came to Wrangell in 2019.

Visitor industry jobs and wages in Wrangell had remained relatively stagnant through 2017, despite an increasing number of visitors. The primary reason for this disparity appears to be Wrangell's previous reliance on the ferry system for bringing independent (non-cruise) visitors to the community. Ferry tourism decreased by 54% in Wrangell between 2014 and 2018 due to deep budget cuts to the Alaska Marine Highway System, reduced and unattractive schedules for tourists, and a lack of reliability due to last-minute cancellations of bookings by ferry system.<sup>3</sup> While cruise visitation nearly doubled during the same period, cruise passengers spend fewer dollars per visitor in the community than ferry tourists did, as they stay for a much shorter time and do not require overnight accommodations.<sup>4</sup>

Another reason for lack of tourism industry growth is a cap on the number of people allowed to visit Anan each year. Anan represents the crown jewel of Wrangell's draw as a tourist destination.<sup>5</sup> With constraints on this visitor attraction it is difficult to grow the visitor sector as a whole. Related to this is the fact that cruise visitors have been securing more Anan slots with local vendors through contracts with the ships in recent years, meaning that independent visitors who spend more time and dollars locally to go bear viewing while in Wrangell are being displaced by those who spend less time and fewer dollars in the community overall.

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<sup>3</sup> Regionally, the decrease in AMHS tourist ridership was -32%.

<sup>4</sup> Total arriving ferry passengers have decreased by 70% since 1999.

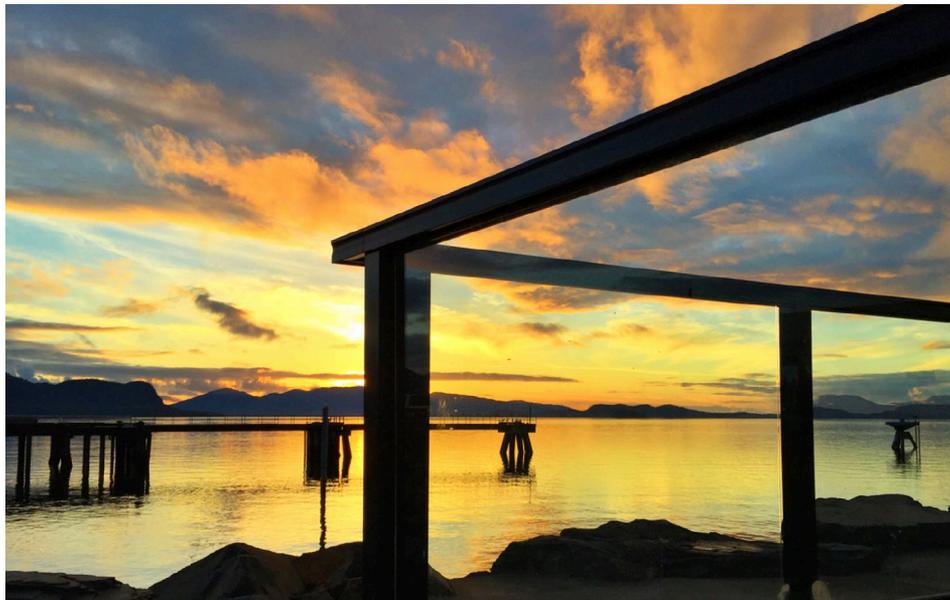
<sup>5</sup> While Anan capacity is not always met, daily caps in addition to seasonal caps mean that last minute cancellations for inclement weather or other factors cannot be "made up" at later dates.

# Wrangell's Visitor Industry by the Numbers

	Year 2010	Year 2014	Year 2017	Year 2018	% Change
<b>Total Air, Cruise, Ferry, Yacht Passenger Arrivals</b>	<b>2010</b>	<b>2014</b>	<b>2017</b>	<b>2018</b>	<b>Change 2017-2018</b>
Air Passengers	10,587	11,896	13,088	13,809	6%
Summer Only Air Passengers (May-August)	4,833	5,380	6,163	6,309	2%
Mid Sized Cruise Ship Passenger Arrivals	3,869	5,171	11,442	12,000	5%
Small Ship Passenger Arrivals (capacity, not actuals)	2,910	2,925	2,198	2,991	36%
Alaska Marine Highway System	7,325	6,803	4,841	3,749	-23%
Summer Only Passengers	3,954	3,674	2,359	2,056	-13%
Total Yacht Visitors	960	1,052	1,334	1,618	21%
<b>Total Passenger Arrivals in Wrangell (via Air, Cruise, Ferry &amp; Yacht)</b>	<b>25,651</b>	<b>27,847</b>	<b>32,903</b>	<b>34,167</b>	<b>4%</b>
<b>Summer Tourists to Wrangell</b>	<b>2010</b>	<b>2014</b>	<b>2017</b>	<b>2018</b>	<b>Change 2017-2018</b>
<b>Total Summer Tourists</b>	<b>11,507</b>	<b>13,256</b>	<b>18,944</b>	<b>20,019</b>	<b>6%</b>
Cruise (21,540 passengers expected 2019)	6,779	8,096	13,640	14,991	10%
Yacht Visitors	960	1,052	1,334	1,618	21%
Air (estimate)	1,768	2,008	2,606	2,449	-6%
Ferry (estimate)	2,000	2,100	1,364	961	-30%
<b>Total Summer Tourist Spending (estimate)</b>	<b>\$3,146,849</b>	<b>\$3,286,171</b>	<b>\$4,597,453</b>	<b>\$5,116,591</b>	<b>11%</b>
<b>Summer Yacht Traffic</b>	<b>2010</b>	<b>2014</b>	<b>2017</b>	<b>2018</b>	<b>Change 2017-2018</b>
Total Yacht Arrivals	310	377	489	605	24%
Average Days Yachts visited	2	2	2	2	0%
Total Yacht Visitors	840	1,052	1,334	1,618	21%
Total Yachter Spending (estimate)	\$273,840	\$342,952	\$434,884	\$566,300	30%

Note: For the purposes of this analysis, small cruise ships are defined as those with 30 to 199 passengers per vessel. Mid cruise ships have 200 to 1,299 passengers per vessel. Large cruise ship have more than 1,300 passengers per vessel. Currently Wrangell has no large cruise ships visiting the community.

<i>Wrangell's Visitor Industry by the Numbers Continued</i>	Year 2010	Year 2014	Year 2017	Year 2018	% Change
<b>Hotel Room Nights</b>	<b>2010</b>	<b>2014</b>	<b>2017</b>	<b>2018</b>	<b>Change 2017-2018</b>
Total Hotel Room Sales All Year	7,748	6,787	7,833	7,665	-2%
May-Sept Only Room Rental Nights	4,877	4,574	3,995	4,737	19%
<b>Jobs and Earnings</b>	<b>2010</b>	<b>2014</b>	<b>2017</b>	<b>2018</b>	<b>Change 2017-18</b>
Visitor Industry Employment <small>(excludes self-employed)</small>	88	80	77	81	5%
Average Visitor Industry Wage <small>(includes self-employed)</small>	<i>n/a</i>	\$22,227	\$24,066	\$27,259	13%
Total Visitor Industry Employment 2016 <small>(includes self-employed)</small>	<i>n/a</i>	101	100	106	6%
Total Visitor Industry Workforce Earnings <small>(includes self-employed)</small>	<i>n/a</i>	\$2,244,990	\$2,406,618	\$2,889,447	20%
Peak Visitor Industry Employment <small>(includes self-employed)</small>	<i>n/a</i>	137 (July)	124 (July)	135 (July)	9%
Total Visitor Industry Businesses <small>(includes self-employed)</small>	<i>n/a</i>	37	37	39	5%



## Summer Visitation and Spending Analysis

In 2018, more than 20,000 summer tourists visited Wrangell and spent an estimated \$5.1 million in the local economy. This includes expenditures on accommodations, food, excursions, and shopping. Across all visitor arrival modes, visitor spending was calculated at \$256 per person per visit in 2018.

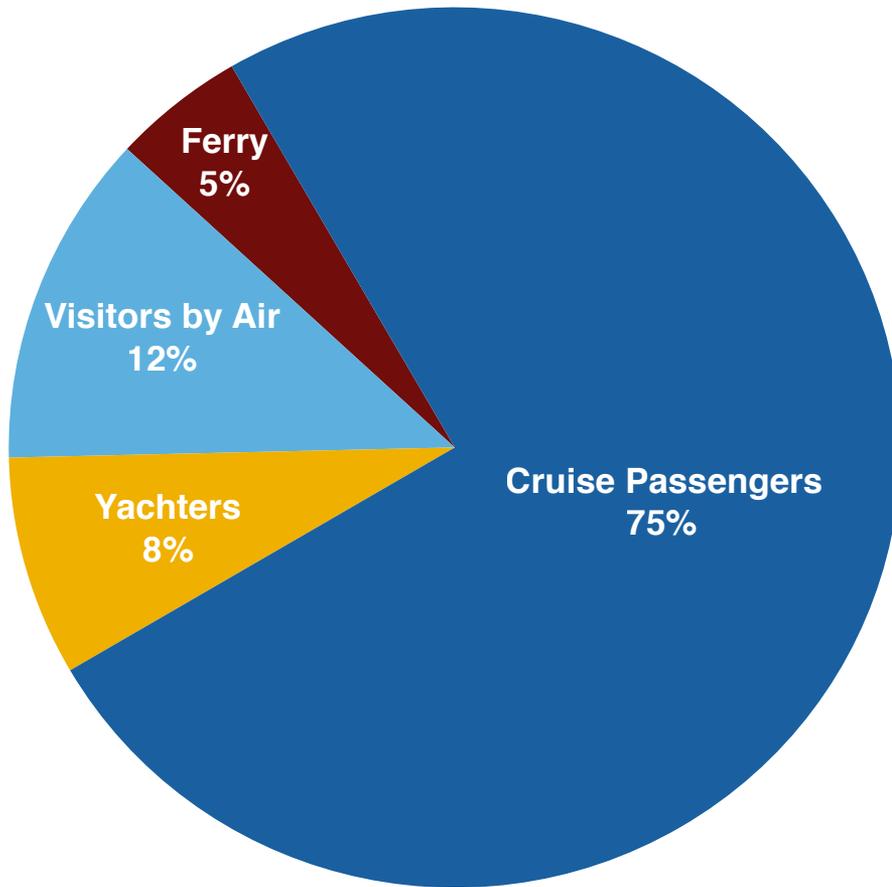
Cruise visitors represented three-quarters (75%) of all tourists in 2018, but represented less than half (49%) of all estimated summer visitor spending in 2018. Independent tourists (those staying overnight in Wrangell) are estimated to have spent \$2.6 million during the summer of 2018.

Ferry tourists represent an ever decreasing number of visitors to Wrangell. 2017 was the first year that tourists arriving by air outnumbered tourists arriving by ferry, and 2018 was the first year that tourists arriving by yacht outnumbered tourists arriving by ferry. In 2018, just 5% of tourists came by ferry, versus 28% in 2012 (see graphic on page 2).

### Summer Tourists by Mode of Arrival and Expenditures in Wrangell 2018

	2018	Total Estimated Summer Visitor Spending 2018	Total Estimated Spending Per Passenger
<b>Total Tourists</b>	<b>20,019</b>	<b>\$5,116,591</b>	<b>\$256</b>
Cruise Passengers	14,991	\$2,525,984	\$169
Yachters	1,618	\$566,300	\$350
Visitors by Air	2,449	\$1,591,850	\$650
Ferry	961	\$432,450	\$450

## Summer Tourists by Mode of Arrival in Wrangell 2018



Three-quarters of all tourists arrived by cruise ship in 2018, while 12% arrived by air, 8% arrived by yacht, and just 5% arrived by ferry.

## Summer Tourists to Wrangell 2010-2018<sup>6</sup>

Summer Visitors to Wrangell	2010	2014	2017	2018	% Change 2010-2018	% Change 2017-2018
<b>Total Visitors</b>	<b>11,907</b>	<b>13,256</b>	<b>18,944</b>	<b>20,019</b>	<b>68%</b>	<b>6%</b>
Cruise	6,779	8,096	13,640	14,991	<b>121%</b>	<b>10%</b>
Yachters	960	1,052	1,334	1,618	<b>69%</b>	<b>21%</b>
Air	1,768	2,008	2,606	2,449	<b>39%</b>	<b>-6%</b>
Ferry	2,000	2,100	1,364	961	<b>-52%</b>	<b>-30%</b>

Total visitor arrivals in Wrangell were up by 6% between 2017 and 2018. Yacht passenger numbers increased the most, growing by 21%. Summer visitors arriving by cruise ship increased by 10%, while 6% fewer tourists via plane arrived in the community. However, one segment was down significantly – the total number of tourists traveling by ferry decreased by 30%.

Between 2010 and 2018, the total number of tourists arriving via ferry decreased by 52%, while those arriving by cruise ship increased by 121%. In 2019, cruise passengers increased by an additional 32% over 2018 levels.

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<sup>6</sup> Air: US Bureau of Transportation Statistics RITA arriving passengers. Cruise Passengers: McDowell Group & Cruise Line Agencies of Alaska. Small cruise ship schedules with research regarding total capacity. Alaska Marine Highway System Annual Traffic Volume Reports and direct data request. Yacht counts provided by City and Borough of Wrangell. "Summer tourists" are calculated in a variety of ways. All yacht and cruise passengers are considered "tourists." Air and ferry passengers are calculated by subtracting October to April average passenger arrivals from monthly summer passenger arrivals. From this number total seafood processing workers in Wrangell per summer is subtracted.

## Summer Tourist Expenditures by Category

Of the \$5.1 million in summer spending by visitors, \$2.7 million (53% of all spending) was spent on excursions. Excursions include jet boat tours, kayaking or canoe rentals and tours, whale watching, bus tours, sports fishing, photography tours, walking tours, flight seeing, museum and Shakes Island visitation.

Visitors spent nearly \$1.5 million an estimated on food and beverages, including restaurants, bars, cafes, and grocery store spending. They spent more than a half million dollars on accommodations, including nights at hotels, inns, bed and breakfasts, cabins, and RV and tent campgrounds. Just under a half million dollars was spent by visitors on retail and localized transportation.<sup>7</sup> Local transportation includes use of taxis and car rental, and does not include transportation to and from Wrangell, or excursions.

### Total Summer Tourist Spending<sup>8</sup>

Summer Spending by Visitors by Category	2017	2018
<b>Total estimated summer tourist spending</b>	<b>\$4,597,453</b>	<b>\$5,116,591</b>
Excursions	\$2,113,395	\$2,694,747
Food, Alcohol, Coffee	\$1,463,496	\$1,452,121
Retail Spending and Transportation	\$549,016	\$416,155
Hotel	\$471,546	\$553,568

Rain Coast Data developed an estimate of summer visitor spending by category using local sales tax records for retail spending, bars, and restaurants; transient tax database actuals for hotel rooms; Anan ticket fee actuals; Nolan Center receipts; estimates for other trips using operator survey data; and other executive interviews, research, and data analyses.

<sup>7</sup> Local transportation includes only taxis and car rental.

<sup>8</sup> Total visitor spending per category was calculated in two ways. First it was developed using estimates of how many days each type of visitor stayed, depending on mode, and how much spending per person occurred per visit per spending category. Those figures were then cross-referenced with City and Borough of Wrangell sales tax receipts for businesses serving visitors. Total sales tax receipts for winter months were subtracted from summer months to determine "visitor spending." Summer hotel spending was determined by bed tax records for May to September. Rooms paid for with a government rate were subtracted, save for six percent that participated in local excursions. Total campground and RV payments were estimated.

## Wrangell Summer Tourist Expenditures by Category

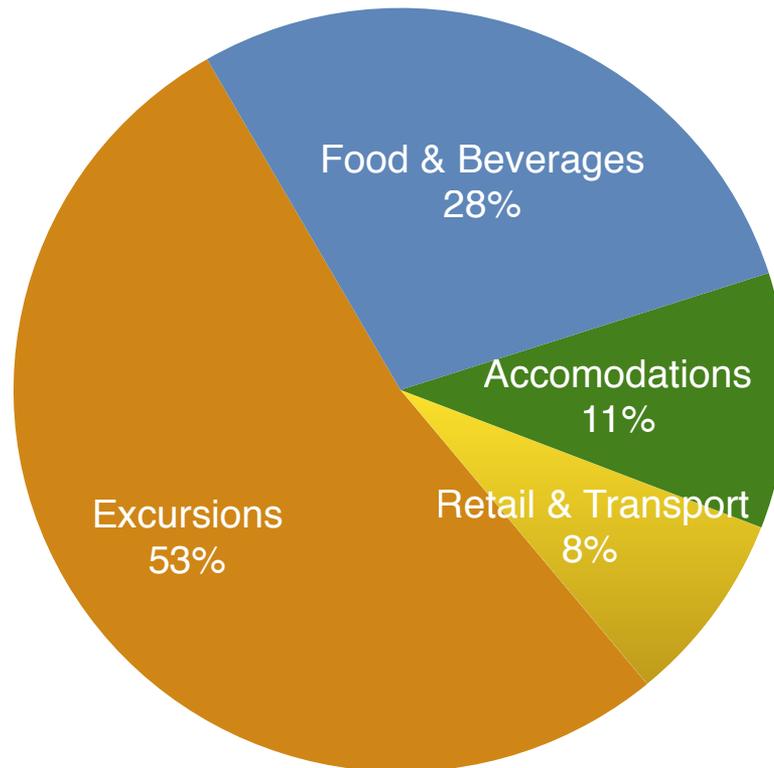


Photo: J. Kulisek Shutterstock ID: 581132692 Ferry heading into Wrangell

## Cruise Passengers<sup>9</sup>

As the national economy grows stronger and Alaska’s popularity increases, Southeast Alaska has become more attractive to cruise ship visitors. Cruise passenger arrivals hit a new regional record in 2019, and the number of cruise passengers coming to the region is expected to rise as larger, higher capacity vessels visit the region.

This trend is evident in Wrangell. The number of cruise passengers arriving in Wrangell saw more than a nine-fold increase—from a low point in 2012 of 2,315 cruise passengers to 21,540 passengers in 2019<sup>10</sup>—visiting Wrangell on small to mid-sized cruise ships.<sup>11</sup> Nine small cruise ships made port calls. Eight medium-sized cruise ships visited Wrangell in 2019. Four of these ships have the capacity for 200-700 passengers and made multiple visits to the community, including the *Regatta*, *Seabourn Sojourn*, *Silver Muse*, and *Star Legend*. The *Maasdam* was the largest cruise ship to visit Wrangell in 2019, with a total passenger capacity of 1,266. It made three visits.

For the purposes of this analysis, small cruise ships include those with 30 to 199 passengers per vessel; mid-sized cruise ships includes those with 200 to 1,299 passengers per vessel. Wrangell currently has no large cruise ship visitations, those with at least 1,300 passengers per vessel.



Regatta docked in Wrangell by R. Friedman

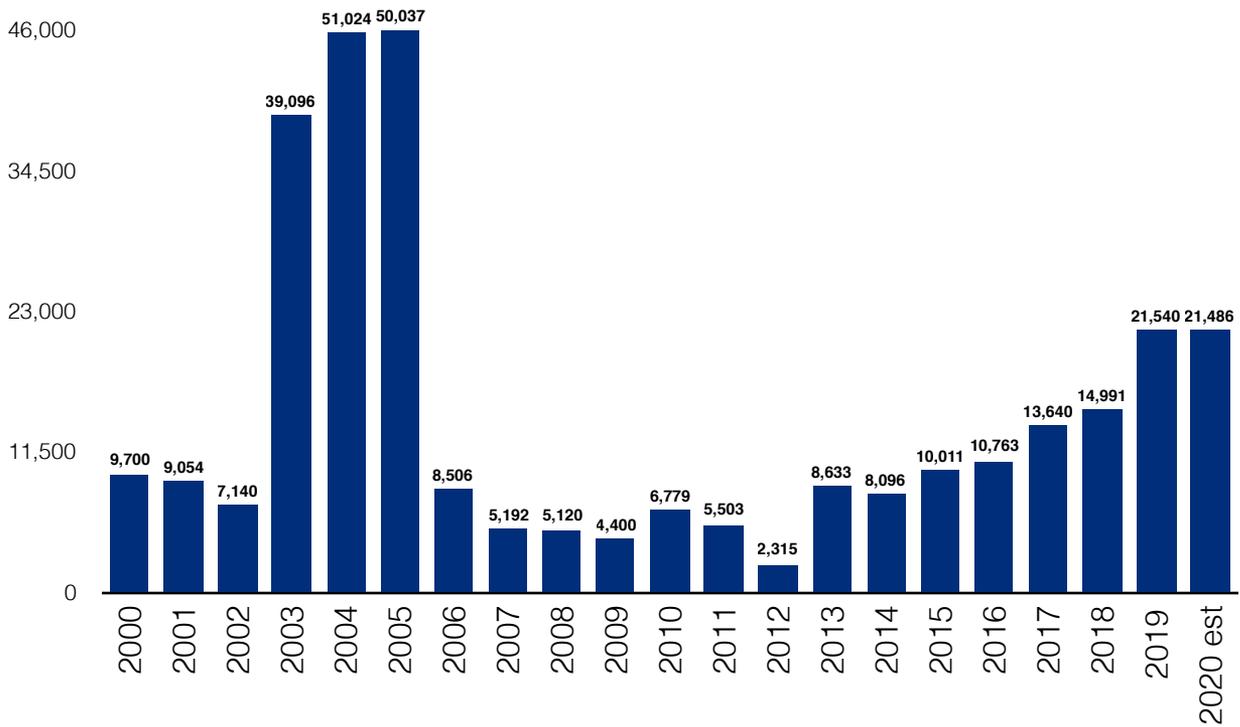
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<sup>9</sup> Midsized cruise passenger actuals were provided by McDowell Group & Cruise Line Agencies of Alaska. 2019 and 2020 are estimates based on capacity. All other cruise passenger data are estimated totals based on small cruise ship schedules and research regarding total capacity.

<sup>10</sup> A 2020 draft schedule for the small cruise ships has not yet been released, so this estimate uses 2019 figures for these passengers.

<sup>11</sup> This figure combines actual numbers from midsized cruise ship arrivals and capacity numbers from smaller cruise ships.

## Total Cruise Passengers in Wrangell 2000-2020



In 2019, based on initial estimates, more than 21,000 passengers visited Wrangell. This represents a 44% increase in total arriving passengers from 2018.

In 2020, some significant changes are going to take place. The Azamara Quest, Crystal Symphony, Maasdam, Silver Muse, and Star Legend will not visit Wrangell. These will be replaced by the Roald Amundsen, the Scenic Eclipse, the Silver Cloud, the Star Breeze, and the Viking Orion. The total number of ports of call will remain the same. Total number of passengers will remain relatively similar. Preliminary estimates indicate that cruise passenger visits for 2020 will decrease by one-quarter of one percent over 2019 levels.

The schedules for midsized 2019 and 2020 ships include the following:

### Mid-Sized Cruise Ship Estimates 2019 and 2020<sup>12</sup>

2019 Ships	Port Calls	Passenger Capacity	Total Visitors
Azamara Quest	1	686	686
Crystal Symphony	1	922	922
Maasdam	3	1,266	3,798
Regatta	5	684	3,420
Seabourn Sojourn	11	450	4,950
Seven Seas Mariner	1	700	700
Silver Muse	3	596	1,788
Star Legend	11	208	2,288
<b>2019 Totals</b>	<b>36</b>		<b>18,552</b>

2020 Ships	Port Calls	Passenger Capacity	Total Visitors
Regatta	5	684	3420
Roald Amundsen	6	530	3180
Scenic Eclipse	1	228	228
Seabourn Sojourn	9	450	4050
Seven Seas Mariner	1	700	700
Silver Cloud	1	296	296
Star Breeze	9	208	1872
Viking Orion	4	930	3720
<b>Grand Total</b>	<b>36</b>		<b>17,466</b>

While the number of mid-sized cruise passengers are projected to drop between 2019 and 2020, two new smaller ships will come to Wrangell next year: the Bremen from Hapag-Lloyd Cruises, and National Geographic's Sea Lion and bring an additional combined 1,032 passengers to Wrangell.

<sup>12</sup> Cruise Line Agencies of Alaska.

## Small Cruise Ships

Small ships are an important part of the Wrangell visitor economy. The following seven small ships from three cruise lines visited Wrangell in 2019:

- **Alaska Dream Cruises:** Alaskan Dream, Baranof Dream, and Admiralty Dream
- **Un-Cruise Adventures:** Wilderness Explorer, Wilderness Adventurer, Wilderness Discoverer
- **American Cruise Lines:** American Constellation

### Small Cruise Ship Preliminary 2019 Schedule

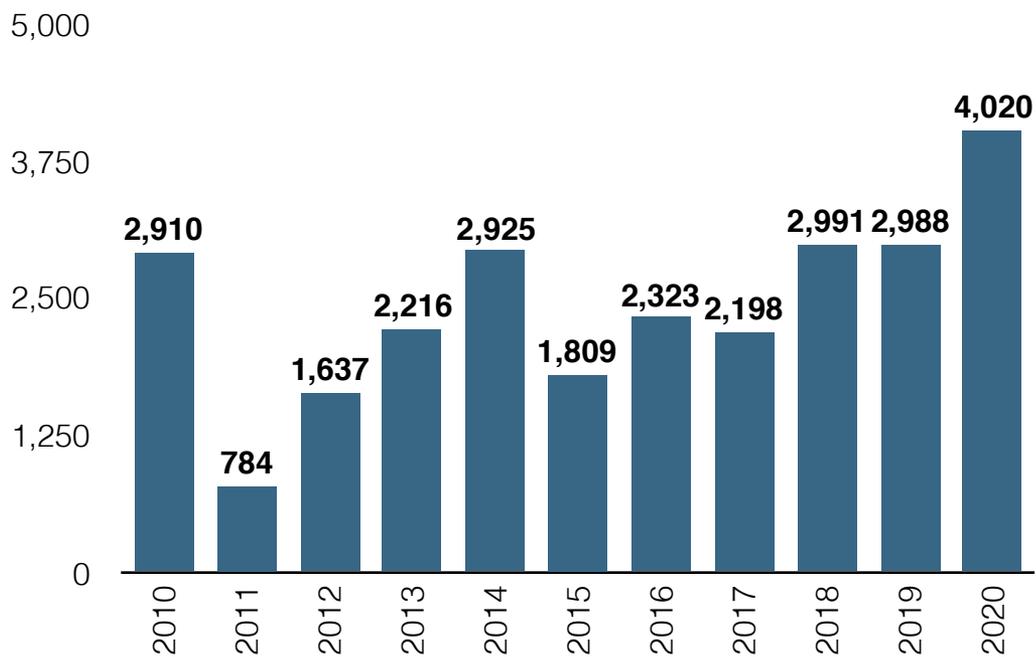
2019 Ships	Preliminary Port Calls 2019	Port Calls 2018	Passenger Capacity 2019
Admiralty Dream	3	0	58
Alaskan Dream	15	15	40
American Constellation	2	2	170
Baranof Dream	6	7	49
Chichagof Dream	0	2	74
Silver Explorer	0	1	132
Wilderness Adventurer	1	1	60
Wilderness Discoverer	8	8	76
Wilderness Explorer	12	10	76
<b>Total</b>	<b>47</b>	<b>46</b>	<b>2,988</b>

In 2019 total small cruise ship visitation to the community was roughly similar to 2018 levels, with three fewer passengers for a total of 2,988 passengers. (Note that small cruise ship data only measures capacity, and not final actuals, which is not available). In 2020, however, assuming the schedule for the above vessels remain the same, the addition of the Bremen from Hapag-Lloyd Cruises, and National Geographic's Sea Lion will increase total small cruise passengers to 4,020, an increase of 35% (which off-sets projected 2020 decreases from mid-sized ships). The full small-cruise schedule for 2020 is not yet available.

Wrangell's small cruise ship sector experienced a disruption in 2010 when Cruise West ceased operations at the end of the summer season. Cruise West accounted for the vast majority of small ship passenger volume in Alaska. While the number of small cruise ship passengers increased between 2011 and 2014, the number of passengers dropped in 2015 when the 88-guest SS Legacy stopped making visits to the Wrangell port.

In the last several years Wrangell has rebuilt the small cruise visitor market. Wrangell competes with other Southeast Alaska communities to attract operators.

### Small Cruise Capacity 2010 to 2020



## Yacht Visitors

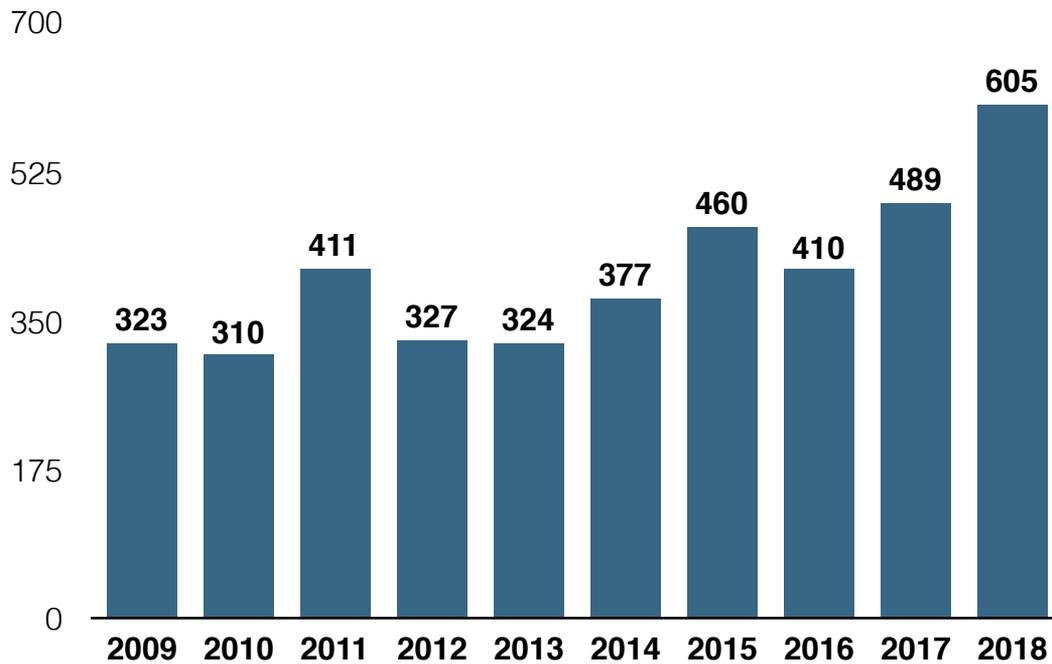
In Wrangell, the size of yachts and length of stay, along with total passengers, are recorded for each yacht visit by City and Borough of Wrangell staff. In 2018, a total of 1,618 people came to Wrangell aboard yachts and stayed an average of two days each. The “average yacht” is 44.6 feet. Total yacht visits were up by 24% in 2018 over 2017. The average number of people per yacht is approximately three, and remained the same as the year before. Total visitors arriving by yacht increased by 21% between 2017 and 2018.

### Wrangell Yacht Traffic

Year	Total yacht visits	Average yacht length	Average People per Vessel	Average Days Stayed	Total Days Stayed	Total Visitors
2009	323	45.5		2	557	
2010	310	46.4		2	665	
2011	411	46.0		2	700	
2012	327	46.2		2	639	
2013	324	50.2		2	700	
2014	377	49.0	2.8	2	858	1,052
2015	460	48.5	2.9	2	1,052	1,326
2016	410	47.5	3.1	2	868	1,178
2017	489	45.3	2.7	2	1,015	1,334
2018	605	44.6	2.7	2	1,189	1,618
<b>Change 2017-2018</b>	<b>24%</b>	<b>-2%</b>	<b>0%</b>	<b>0%</b>	<b>17%</b>	<b>21%</b>

Note: Totals exclude Meyers Chuck yacht visits.

## Wrangell Yacht Visits: 2009 to 2018

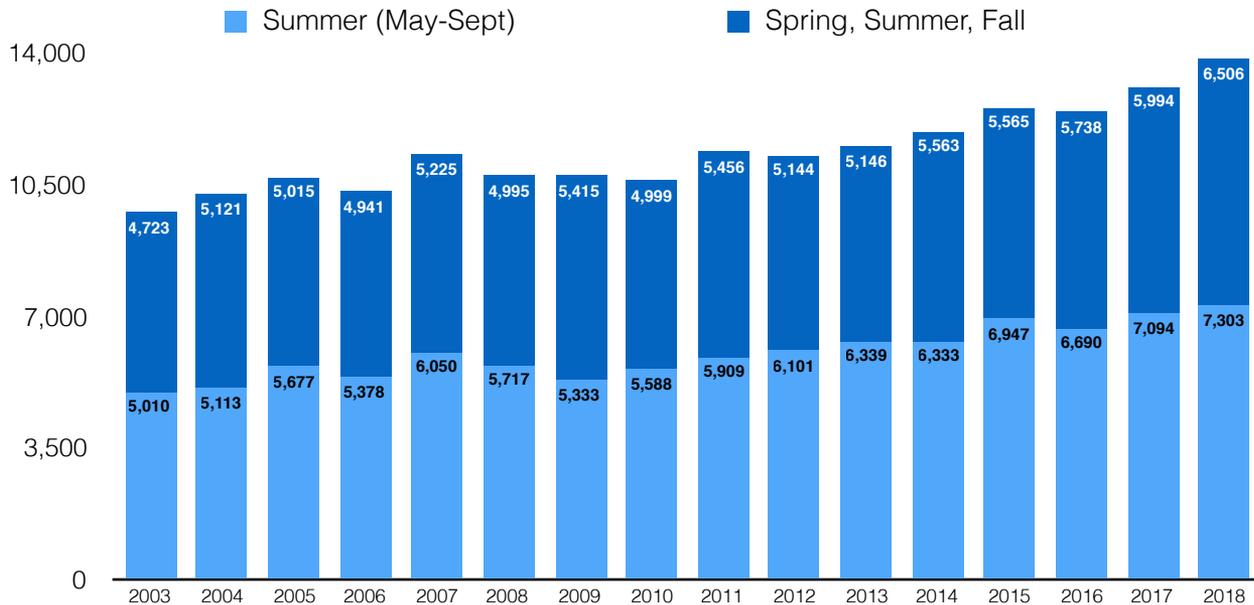


While it is difficult to assess exactly how much yachters spend in Wrangell without a more focused study or survey, using spending estimates per day on excursions like bear viewing, charter sports fishing, food, supplies, and purchases, it is estimated that those arriving by yacht spent \$566,300 in Wrangell in 2018 (excluding dock fees). Yachters accounted for eight percent of all tourists to the community in 2018 (up from seven percent in 2017), and 11 percent of all tourist spending, spending an estimated \$350 per person per visit.

## Air Passengers<sup>13</sup>

In 2018, there were 13,809 air passengers arriving in Wrangell; of these, just over half (7,303) arrived during the summer (May through September). This represents a 6% increase in total summer passengers from 2017, and a 30% increase since 2010.

Airline Passengers Arriving in Wrangell



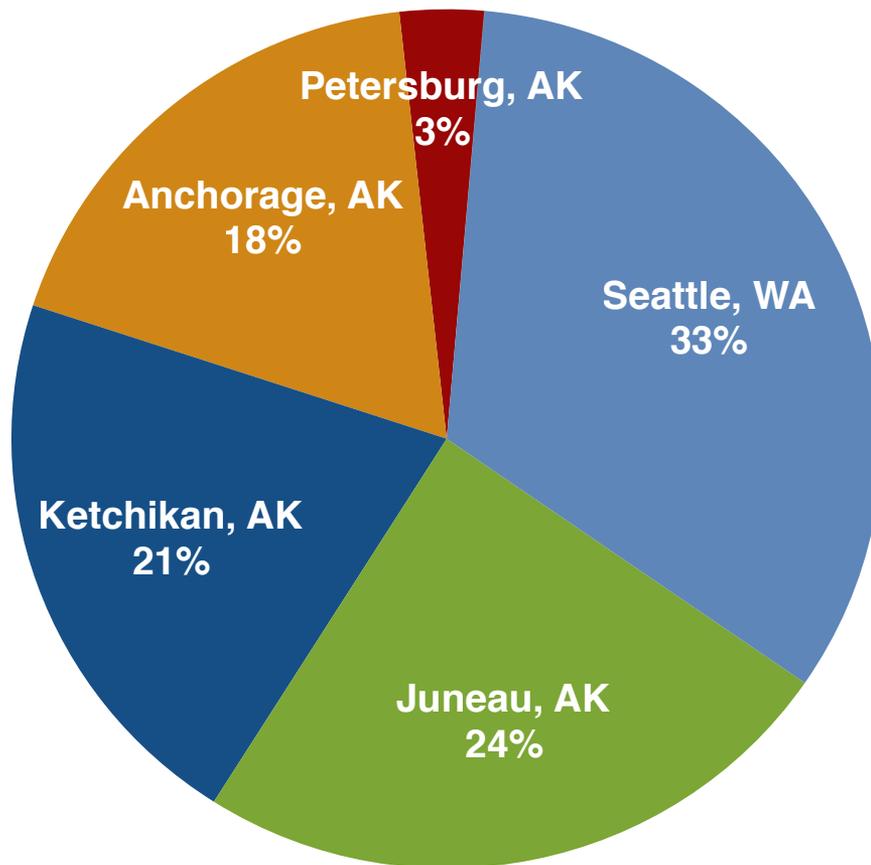
To estimate how many of these summer travelers were in fact tourists (rather than locals traveling home or people traveling to work in Wrangell), average off-season monthly travel numbers were subtracted from high-season monthly travel numbers, and the number of seafood processor workers was subtracted from this figure. Using this methodology, it is estimated that just over one-third—2,447—of summer air travelers visited for the purpose of recreation.

Year	Total Passengers	Total Summer Passengers	Total Estimated Tourists (Avg. winter month travel minus seafood processor workers)
2018	13,809	7,303	2,447

<sup>13</sup> Bureau of Transportation Statistics T-100 Market data.

Looking at a full year of passenger data, the greatest percentage of passengers arrived in Wrangell via Seattle (33%), while nearly a quarter (24%) arrived via Juneau, and 21% of arrivals came by way of Ketchikan. Approximately 2,500 passengers –18% – arrived via Anchorage. Three percent of Wrangell passengers came on flights via Petersburg. (Data includes all scheduled flights).

### Passengers Disembarkments by Connecting City 2018



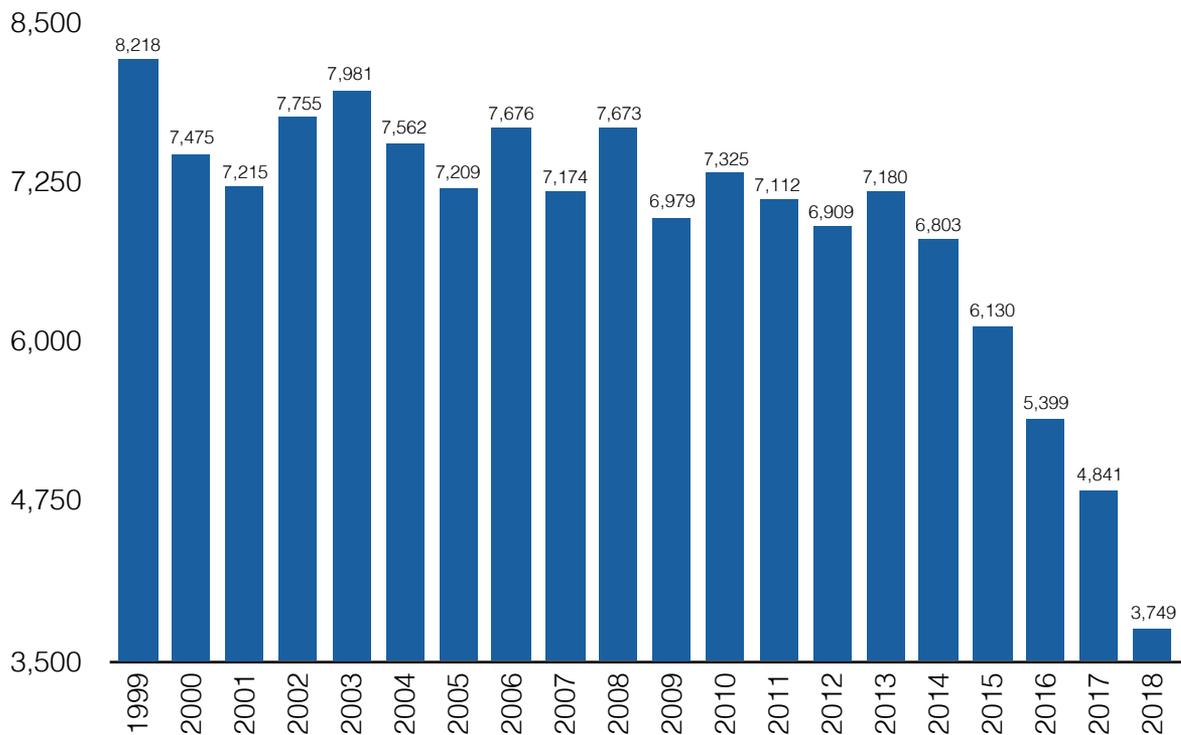
## Total Passenger Arrivals by Connecting City 2014 - 2018

Passenger Connecting City	Passengers 2014	Passengers 2017	Passengers 2018	Change 2017-2018
Seattle, WA	4,361	4,603	4,589	0%
Juneau, AK	2,745	3,076	3,364	9%
Ketchikan, AK	2,446	2,805	2,907	4%
Anchorage, AK	1,957	2,147	2,517	17%
Petersburg, AK	376	410	430	5%
Sitka, AK	20	27	0	-100%
Other, AK	27	20	2	-90%
<b>Total</b>	<b>11,932</b>	<b>13,088</b>	<b>13,809</b>	<b>6%</b>

## Ferry Passengers<sup>14</sup>

In 2018, a total of 3,749 Alaska Marine Highway (AMHS) ferry passengers arrived in Wrangell; of these, 55%, or 2,056, arrived during the summer (May through September). Total ferry passenger numbers decreased by 23% between 2017 and 2018. Since 2013, the number of passengers disembarking in Wrangell has decreased every year, with significant annual decreases since 2015. Total arriving passengers are less than half of the levels of 20 years ago.

Ferry Passengers Arriving in Wrangell 1999 to 2018



In recent years the Alaska Marine Highway System has been hit hard by state budget cuts, significantly reducing state funding levels. Service and port calls have been cut significantly, and Wrangell has been disproportionately impacted. The unreliability of the ferry scheduling and the increase in costs to travel have impacted ferry users, but even more significantly impacted those who have built their businesses around serving ferry passengers. A reputation for the unreliability of the ferry system means that potential

<sup>14</sup> Alaska Marine Highway System Annual Traffic Volume Reports for 2010 and 2014. Direct data request for 2016, 2017, and 2018 data.

customers are less likely to want to use the ferry for travel, further impacting total ridership numbers.

Arriving summer ferry passenger numbers were down 26% in 2018 over 2017 numbers. During the same period, those likely to be tourists fell by 30%. To estimate how many summer travelers were in fact tourists, the average number of off-season monthly travel numbers were subtracted from high season monthly travel numbers. Using this methodology, it is estimated that nearly half (961) of summer ferry travelers visited for the purpose of recreation.

### Total Passenger Arrival Change by Year

Passenger Origin	Total Arriving Ferry Passengers	Summer Only Passengers (May-Sept)	Summer Tourist Passengers (Estimated)
2018	3,749	2,056	961
2017	4,841	2,794	1,364
2016	5,399	2,970	1,365
2014	6,803	3,674	2,094
2010	7,325	3,954	1,969
<b>Change 2014-2018</b>	<b>-45%</b>	<b>-44%</b>	<b>-54%</b>

Tourists arriving by ferry are estimated to have spent \$432,450 in Wrangell last summer. Ferry tourists accounted for five percent of all tourists to the community in 2018 (down from seven percent in 2017), and eight percent of all tourist spending (down from 12 percent in 2017), spending an estimated \$450 per person per visit. Average ferry passenger spending is estimated at a higher level than for other transportation modes as ferry tourists are more likely to stay for a longer period in the community.

	2018	Total Estimated Summer Visitor Spending 2018
<b>Total Wrangell Tourists</b>	<b>18,734</b>	<b>\$5,116,591</b>
Ferry Tourists	961	\$432,450
% Ferry Tourists	5%	8%

## 2019 Wrangell Tourism Survey

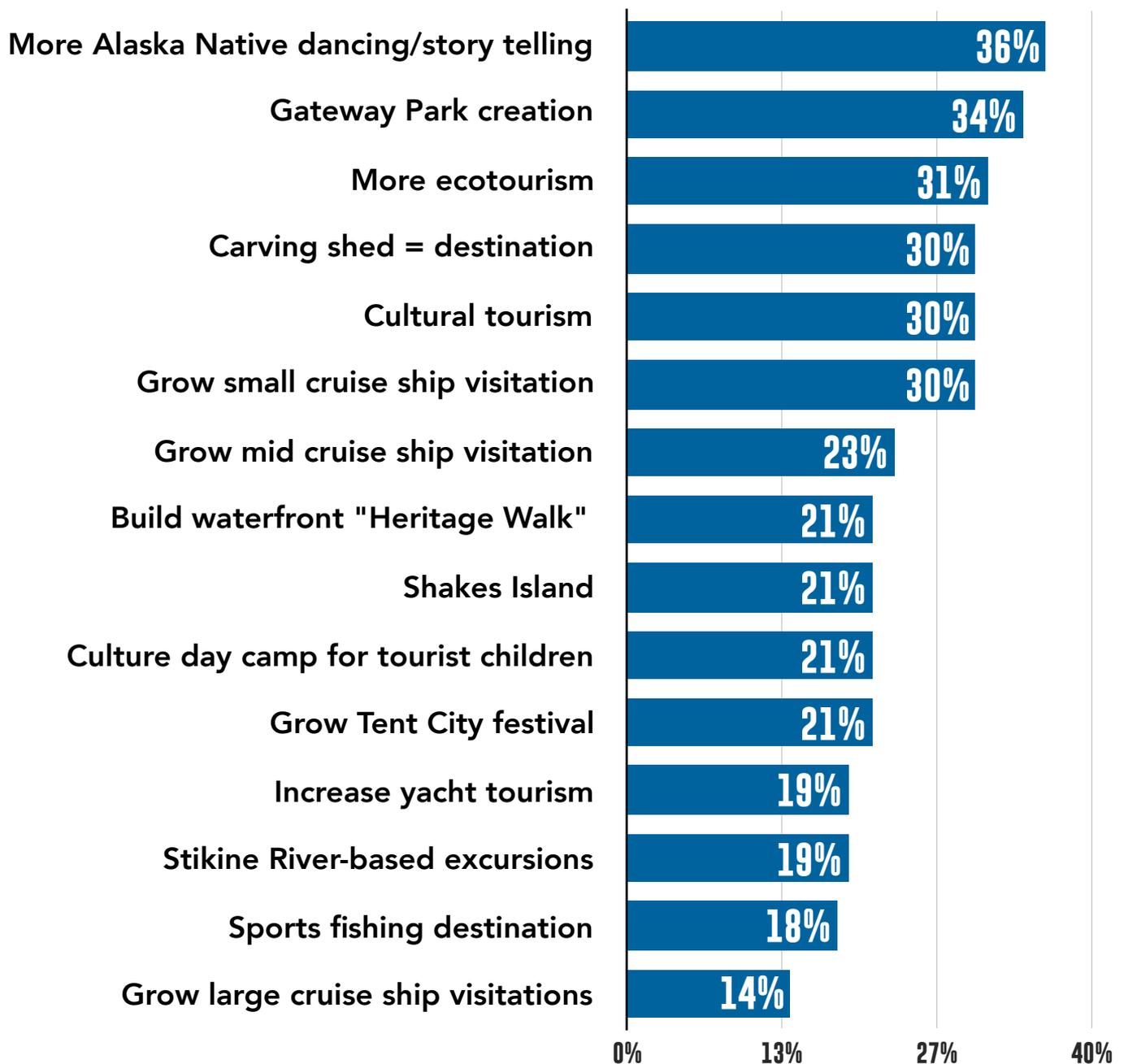
The following pages and information are derived from a Wrangell Cooperative Association survey.

The Wrangell Cooperative Association (WCA) conducted a community survey in 2019, including questions regarding the local visitor industry. Rain Coast Data designed the survey on behalf of the WCA. The web-based survey was administered electronically from June 21st through July 19th, 2019. A total of 482 people in Wrangell took the survey. It was open to all community members over the age of 10. There are 2,137 residents over the age of 10 in Wrangell. This means 23% of community members in this demographic participated in the process, for a survey confidence level of 95% with a margin of error of 3.9%.

Survey respondents were given a list of 15 tourism initiatives and asked about the demand or need for each in the community. Respondents feel that the greatest area of demand in the local visitor industry is increased Alaska Native dancing and story telling, with 36% of respondents calling this a high level of demand or need. More than one-third of respondents (34%) say that Gateway Park, a proposed concept to move existing freight services from downtown Wrangell to the Old Mill site and create a park in its place for visitors and locals alike, has a high level of demand in the community. Wrangell residents do not appear to want to make the community into a sport fishing or large cruise ship destination.

# How Important are the Following Tourism Related Needs in Wrangell?

Respondents saying this has a high level of demand or need



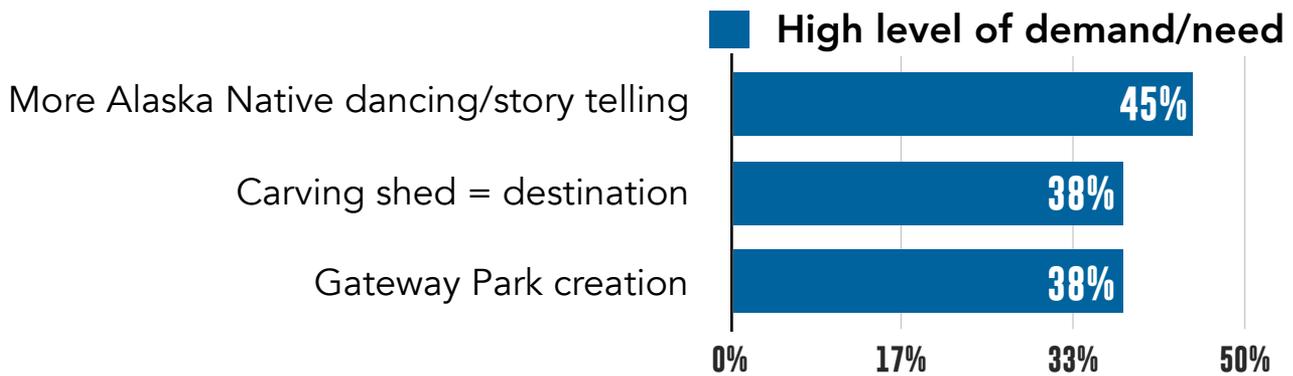
# How Important are the Following Tourism Related Needs in Wrangell?

Answer Options	High level demand/ need	Medium level demand/ need	Low level demand/ need	No need or demand at this time	Unsure
More Alaska Native dancing and storytelling for visitors	36%	39%	13%	4%	9%
Gateway Park Creation: Move existing freight services to the Old Mill site and create a gateway park in its place (for visitors and locals)	34%	28%	14%	14%	9%
Develop more ecotourism (tourism that focuses on nature and the environment)	31%	38%	15%	8%	7%
Make the carving shed into a visitor excursion/destination	30%	40%	16%	5%	9%
Develop cultural tourism opportunities for visitors	30%	39%	17%	7%	7%
Grow small cruise ship visitation (30 to 170 passengers per vessel)	30%	33%	18%	11%	8%
Grow mid cruise ship visitations (200 to 1,000 passengers per vessel)	23%	32%	21%	16%	8%
Build elevated waterfront "Heritage Walk" pedestrian walkway extending between City Dock to the Nolan Center	21%	29%	22%	22%	6%
Create more walking tours to Shakes Island	21%	34%	25%	8%	13%
Develop a culture day camp for tourist children	21%	27%	30%	12%	9%
Grow Tent City festival	21%	31%	22%	16%	11%
Increase yacht tourism	19%	33%	24%	13%	11%
Develop more Stikine River-based excursions	19%	28%	26%	18%	9%
Make Wrangell into a sports fishing destination (i.e. more charters, lodges, etc.)	18%	31%	25%	19%	8%
Grow large cruise ship visitations (1,300 passengers+ per vessel)	14%	22%	24%	33%	8%

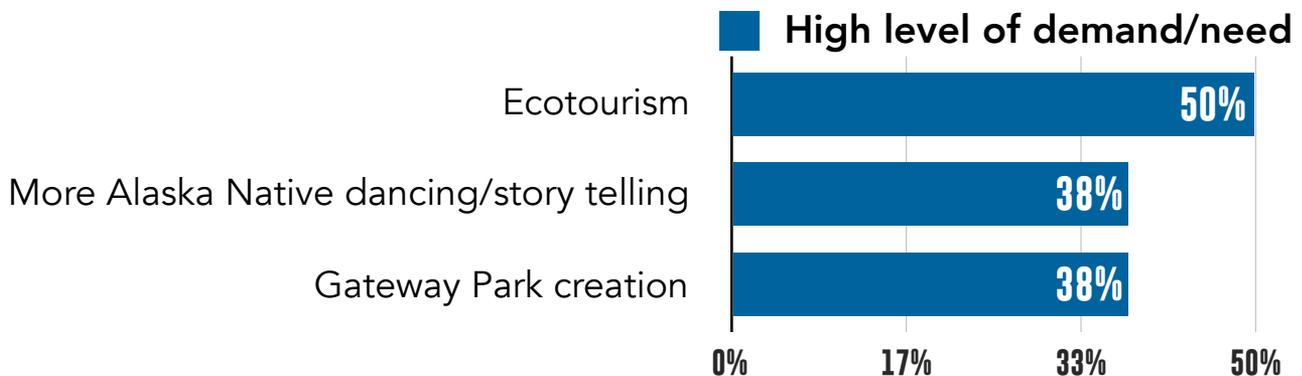
# How Important are the Following Tourism Related Needs in Wrangell?

Wrangell's Alaska Native respondents' top three tourism priorities include increased Alaska Native dancing performances, making the carving shed into a visitor destination, and developing Gateway Park. The top priority of the community's youth is to develop more ecotourism excursions. The lowest priority of each sub-demographic is large cruise ship visitation.

## Alaska Native Only Analysis



## Youth Only Analysis



# Anan, Stikine, LeConte Tours Analysis

## Anan Wildlife Observatory

The most important visitor attraction in Wrangell is Anan. Anan Creek is an historic Tlingit Native fishing site located on the mainland on the south end of Wrangell Island. The area has the largest pink salmon run in Southeast Alaska, attracting large numbers of black and brown bears during July and August. The Anan Wildlife Observatory is managed by the Wrangell District of the Tongass National Forest and is only accessible by boat or plane. There is a half-mile trail leading to the observation deck, strategically allowing visitors to view bears while they fish for salmon in cascading waterfalls. During peak season, which is July 5 through August 25, visitors need to obtain a permit from the US Forest Service. There is a high demand for the daily passes and often permits need to be obtained at least 6 months in advance. Admission to the site is carefully managed by the Forest Service, and the number of visitors is limited to 60 per day. Passes are not required outside of the peak season.

In 2017, ten Wrangell-based companies provided tours to Anan. These businesses include the following:

- Alaska Charters and Adventures
- Alaska Peak and Seas
- Alaska Vistas
- Alaska Waters
- Aqua Sports
- Breakaway Adventures
- Southeast Alaska Fly Fishing
- Stickeen Wilderness Adventures
- Summit Charters
- Sunrise Aviation

According to the US Forest Service, these Wrangell-based operators provided 1,547 guided Anan bear viewing tours during the Anan permit season, from July 5 to August 25, in 2017. This represents a 15% decrease over 2015.

Preliminary data from 2019 show that numbers continued to be down in 2019, despite efforts made to use a new reservation system.

## Anan Creek Bear Viewing: Wrangell Origin, Guided Tours During Season<sup>15</sup>

Year	Allocation	Allocation Used	% Allocation Used	Private Clients	Total Clients
2004	1,178	1,002	85%	140	1,142
2005	1,178	915	78%	246	1,161
2006	1,218	927	76%	280	1,207
2007	1,218	770	63%	471	1,241
2008	1,218	957	79%	528	1,485
2009	1,218	846	69%	377	1,223
2010	1,218	764	63%	625	1,389
2011	1,293	897	69%	594	1,491
2012	1,293	1,051	81%	585	1,636
2013	1,293	1,112	86%	744	1,856
2014	1,293	962	74%	746	1,708
2015	1,293	1,159	90%	661	1,820
2016	1,283	1,042	81%	537	1,579
2017	1,283	1,040	81%	507	1,547
<b>Change 2015-2017</b>	<b>-1%</b>	<b>-10%</b>	<b>-9%</b>	<b>-23%</b>	<b>-15%</b>

### Anan Visitation Decline Factors

The primary reason for the 15% reduction in clients, according to interviews, was a technical change in how the commercial operators' reservation system was managed after the 2015 season.<sup>16</sup> The result was that total allocation use dropped from 90% under the old system to 81% under the new system. In 2014 there was also a decrease that was related to a weather event that shortened the bear viewing period.<sup>17</sup>

<sup>15</sup> Data provided by Forest Service Wrangell Ranger District Dee Galla. We have updated data for 2019, however it is not clear if these datasets are entirely equivalent, and thus we are not comparing.

<sup>16</sup> For a more detailed explanation, read "Anan Commercial Reservation System Improvements Desired" section in Wrangell Visitor Industry 2018.

<sup>17</sup> Based on interview with Dee Galla in 2014.

Migration of the commercial reservation system to Recreation.gov occurred in 2018 to help address allocation issues, but has not solved all of the obstacles to achieving maximum usage.<sup>18</sup> Because of this, the Forest Service will implement alternative one-year program for 2020 in order to achieve maximum allocation levels. The goal is to use all of the permits available for Anan Creek in 2020.<sup>19</sup>

### **Non-Wrangell-Based Visitors**

In addition to the Wrangell-based providers, Anan Creek was also visited by an additional 887 people in the 2017 Anan season. Most of these were guided visits that originated from communities outside Wrangell, but a small number of tourists also visited Anan Creek independently, without a guide. In contrast to the decrease in Wrangell's share of Anan visitors, tours to Anan originating from outside Wrangell (often via Ketchikan) increased by 12% (nearly 100 visitors) between 2015 and 2017.

### **Non-Permitted (but allowed) Visitors**

Federal permits are not required outside of the July 5–August 25 peak season, so in addition to the Anan Creek guided land-based visits that occurred during the Forest Service defined permit season, Wrangell guides brought an additional estimated 793 visitors to the Anan area.<sup>20</sup> These visits fall into two categories—those arriving before or after the prescribed Anan season, and those having an exclusively water-based tour. A week before or after the permit season can be an important time for revenue generation, but the reliability of viewing bears can fluctuate from year to year due to the timing of spawning salmon and river levels. The potential lack of spawning salmon in Anan Creek in early July means that bear activity is at a minimum and would not be sufficient to drive those interested in bear viewing to visit Wrangell before July and after August.

In addition to Anan Creek visits, tourists participated in guided tours of the Stikine River and the LeConte Glacier. Other visitor excursions included sport fishing, flightseeing, kayaking, whale watching, travel by water taxi to cabins and trails or other destinations, and other miscellaneous guided tours. Together, visitors spent an estimated \$2.1 million on all tours in 2017.

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<sup>18</sup> Note – all the interviews took place prior to visitor season in the Spring of 2018.

<sup>19</sup> Interview with Clint Kolarich Wrangell District Ranger October 2019.

<sup>20</sup> This information was provided by the tour operators. It should be considered their estimate.

## Stikine River, LeConte Glacier Tour Analysis

There are two additional water-based tours that are very popular in Wrangell. These are the Stikine River and the LeConte Glacier.

**Stikine River:** Wrangell is known for being the gateway to the Stikine River, a name that translates to “the great river” in Tlingit. The Stikine extends 400 miles from headwaters in British Columbia to its mouth near Wrangell and encompasses 27,200 acres of delta flats. Local operators provide jet boat tours, which are the most popular way to access the Stikine River. There is a wealth of history and unique geological elements, as well as spectacular scenery and wildlife opportunities. The Stikine River and tributaries comprise the Stikine-Leconte Wilderness area. For the more advanced adventurer, canoes, kayaks, and rafts are available locally.

**LeConte Glacier:** The LeConte Glacier is North America’s southernmost tidewater glacier and is part of a massive glacial system that stretches 120 miles. It resides in a 12-mile-long fjord at the head of LeConte Bay, approximately 20 miles from the mouth of the Stikine River. It is an active, advancing glacier with frequent calving. Shakes Glacier on the Stikine River is part of the same glacial icefield. Tours are generally via jet boat and take about four hours.

The average tour costs in 2017 included the following:<sup>21</sup>

- Anan Bear Viewing: \$281 (Range: \$250-\$315)
- LeConte Glacier: \$222 (Range: \$185-\$275)
- Stikine River: \$204 (Range: \$150-\$250)

According to interviews with providers, in 2017 ten Wrangell tourism companies offered activities from jet boat tours to kayak rentals to bear viewing trips. Based on interview data, more than 5,000 total Anan, Stikine and LeConte tours were sold in 2017, generating an estimated \$1.3 million in ticket fees.<sup>22</sup>

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<sup>21</sup> Cost data came directly from providers.

<sup>22</sup> Rain Coast Data contacted operators to determine actual data for Stikine, LeConte, and other tours to combine with the Anan data.

## Anan, Stikine, LeConte Tours Analysis<sup>23</sup>

Summer Visitors to Anan, Stikine, LeConte (guided by Wrangell tour operators)	2006 Study	2017 Study
Anan Visitors (during season)	1,447	1,547
Additional Anan Visitors	n/a	793
Anan Tour Cost	\$304,448	\$657,335
Stikine Visitors	3,796	2,696
Stikine Tour Cost	\$731,998	\$549,984
LeConte Visitors	542	548
LeConte Tour Cost	\$118,211	\$121,656
<b>Total Tours Sold</b>	<b>5,785*</b>	<b>5,584</b>
<b>Total Tour Cost</b>	<b>\$1,154,657</b>	<b>\$1,328,975</b>

\*Total figure excludes non-season Anan visitors for 2006.

## Anan Observatory Bear Viewing Independent Visitor Expenditures

Based on interviews with primary service providers in the Wrangell visitor industry, independent (non-cruise) visitors to Wrangell spend an estimated \$37 to \$59 per day on food, depending on mode of travel (yachters are estimated to spend less than those traveling by air). Coffee and alcohol expenditures are estimated at \$18 per day per visitor. Shopping opportunities in Wrangell are limited, and tourism operators estimated visitors spend \$15-\$21 per day on gifts and clothing items. Generally, visitors have double occupancy in rooms, and the average per person per night accommodation spending is estimated at \$54. Independent visitors who come to Wrangell for bear viewing usually partake in at least one additional tour during their stay, and the average stay is generally agreed upon to be two and a half to three days.<sup>24</sup>

<sup>23</sup> Of the ten operators, nine provided data for this analysis; the final providers numbers were estimated. Providers gave Rain Coast Data average per person fees and total visitors served in each category. Total costs were determined by multiplying these figures. In 2009 a similar study was conducted using 2006 as the base year: Nature-Based Tourism in Southeast Alaska. Darcy Dugan Ginny Fay Hannah Griego Steve Colt. ISER Paper, March 2009. 2006 data comes from that analysis.

<sup>24</sup> This entire analysis was then cross-referenced with total summer sales revenue taxed in each of these categories (food, bars, coffee shops, hotel nights, retail, excursions) and total visitor spending.

Based on this analysis, independent visitors who come to Wrangell for bear viewing generate an estimated \$1.58 million in total spending, which is equivalent to \$1,032 per person during their entire stay in Wrangell.

### Total Spending: **Independent** Anan Visitors (Wrangell Origin)

Per Person Per Day Anan Traveler Costs	2017
Food Expenditures	\$37-\$59
Coffee/Alcohol	\$18
Overnight Accommodation	\$54*
Retail Spending	\$15-21
Anan Average Cost	\$281
Excursions/Tours/Entertainment per day (other days)	\$70-\$150
<b>Average Days</b>	<b>2.5</b>
<b>Total Independent Anan Visitors (est.)</b>	<b>1,526</b>
<b>Total Spending</b>	<b>\$1,576,379</b>
<b>Per Person Trip Expenditures</b>	<b>\$1,032</b>

\*The average cost of a hotel room in Wrangell is \$126.46. The average hotel spending in this chart is lower for several reasons: 1) tourists typically have two persons per room in hotel rooms; and 2) yachters and campers do not use hotel rooms for accommodation.

### **Total Anan Bear Viewing Economic Impact**

Combining the total spending by independent visitors to Anan, as well as cruise visitors who partake in Anan bear viewing, the total estimated economic impact of Anan bear viewing in Wrangell was \$1.9 million in the summer of 2017.

This means more than a third (36%) of all summer tourism-related spending in Wrangell was made by travelers who visited Anan on a guided trip.

## Total Spending: All Anan Visitors (Wrangell Origin)

Per person per day Anan traveler costs, all expenses	2017
Independent Anan Visitors (est.)	1,526
Spending	\$1.58 million
Cruise Ship Anan Visitors (est.)	814
Spending	\$290,731
<b>Total Anan Visitors</b>	<b>2,340</b>
<b>Total Spending</b>	<b>\$1,867,109</b>

According to the survey findings, 31% of all visits to Anan Observatory were made by cruise ship passengers, as opposed to 69% made by independent travelers.<sup>25</sup> At the same time, 84% of the total economic impact of Anan visitors in Wrangell was due to independent travelers, while cruise passengers contributed 16% of the larger economic value realized by the attraction.

One interesting finding from this analysis is that the number of cruise ship visitors going to Anan has been increasing over time. Since the number of permits allotted for Anan are fixed and have not been increasing, this means that the overall economic benefit of Anan to Wrangell is actually decreasing. An independent visitor who comes to Wrangell to visit Anan generates \$1,032 in average local spending, while a cruise ship tourist visiting Anan spends an average of \$357 in the community.

Visitors to Anan often also take another tour while in Wrangell. This analysis assumes that a portion of Anan travelers also partook in additional Wrangell tours, so these impacts are inclusive of other tours, and not exclusive.

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<sup>25</sup> Survey of providers.

## **Total Stikine, LeConte Tour Economic Impact**

The analysis below examines the economic impacts of the Stikine and LeConte Tours. However, because visitors may participate in more than one tour when visiting Wrangell, these economic impacts are not mutually exclusive. A visitor who takes an Anan tour along with a Stikine and a LeConte tour spends their dollars in the community only one time, so the Anan, Stikine, and LeConte tour economic impacts **cannot** be combined with each other.

- Excluding spending on other local tours, visitors who took a Stikine tour in 2017 spent \$1.05 million. Including additional tour spending, this figure increases to \$1.3 million.
- Excluding spending on other local tours, visitors who took a LeConte tour in 2017 spent approximately a third of a million dollars in the community—\$336,748. Including additional tour spending brings this total up to \$480,848.

## Stikine and LeConte Visitor Tour Analysis<sup>26</sup>

Summer Visitors to Stikine, LeConte (guided by Wrangell tour operators)	2017
<b>Stikine Visitors</b>	<b>2,696</b>
<b>Stikine Tour Cost</b>	<b>\$549,984</b>
Total Cruise Passengers (62%)	1,794
Total Tour Cost by Cruise	\$344,260
Total Independent Visitors	902
Total Tour Cost by Independent Visitors	\$205,724
<b>Additional Local Spending by Stikine Visitors</b> (excluding other tours)	<b>\$ 503,458</b>
<b>Total Estimated Spending by Stikine Visitors</b>	<b>\$1,053,442</b>
<b>LeConte Visitors</b>	<b>548</b>
<b>LeConte Tour Cost</b>	<b>\$121,656</b>
Total Cruise Passengers (12%)	24
Total Tour Cost by Cruise	\$6,531
Total Independent Visitors	524
Total Tour Cost by Independent Visitors	\$115,125
<b>Additional Local Spending by LeConte Visitors</b> (excluding other tours)	<b>\$215,092</b>
<b>Total Estimated Spending by LeConte Visitors</b>	<b>\$336,748</b>

<sup>26</sup> Of the ten operators, nine provided data for this analysis; the final providers numbers were estimated. Providers gave Rain Coast Data average per person fees and total visitors served in each category. Total costs were determined by multiplying these figures.

# Anan Commercial Usage 2019

Preliminary usage of Anan Creek Forest Service permits for 2019 is presented below , by date:<sup>27</sup>

June 30	July 1	2	3	4	5	6
					AK Vistas (5) Aqua Sports (15) Stick Wild Adv (6) Sunrise (10)  <b>Used: 36</b>	AK Chart&Adv (1) AK Peak&Sea (5) Breakaway (2) Bluewater (12) SE Aviation (7) Stick Wild Adv (5) Sunrise (4)  <b>Used: 36</b>
July 7	8	9	10	11	12	13
AK Vistas (10) AK Waters (5) Breakaway (8) Carlin Air (6) Family Air (4) Stick Wild Adv (2)  <b>Used: 35</b>	Breakaway (16) Carlin Air (4) Island Wings (9)  <b>Used: 29</b>	Aqua Sports (2) Breakaway (14) Carlin Air (6) Family Air (4) SE Aviation (6) Stick Wild Adv (4)  <b>Used: 36</b>	AK Vistas (2) Breakaway (6) Carlin Air (5) Island Wings (9) Taquan (10)  <b>Used: 32</b>	Aqua Sports (8) Breakaway (17) Family Air (4) Stick Wild Adv (6)  <b>Used: 35</b>	AK Peak&Sea (6) Aqua Sports (5) Breakaway (13) Family Air (4) Sunrise (6)  <b>Used: 34</b>	AK Chart&Adv (4) AK Waters (14) Breakaway (10) SE Aviation (5)  <b>Used: 33</b>
July 14	15	16	17	18	19	20
AK Peak&Sea (10) Aqua Sports (5) Family Air (4) Island Wings (9) SE Aviation (2) Stick Wild Adv (5)  <b>Used: 35</b>	AK Peak&Sea (10) AK Vistas (6) Breakaway (4) Muddy Water (6) Stick Wild Adv (8)  <b>Used: 34</b>	AK Chart&Adv (4) AK Waters (6) Breakaway (4) Carlin Air (4) Stick Wild Adv (6)  <b>Used: 24</b>	AK Chart&Adv (4) AK Waters (6) Breakaway (10) SE Aviation (4)  <b>Used: 24</b>	AK Peak&Sea (10) AK Vistas (6) Aqua Sports (6) Breakaway (4) Family Air (4) Stick Wild Adv (6)  <b>Used: 36</b>	AK Peak&Sea (10) AK Vistas (5) Family Air (4) StickWildAdv (10) SE Aviation (7)  <b>Used: 36</b>	AK Chart&Adv (1) Aqua Sports (8) Breakaway (12) Family Air (3) SE Aviation (2) Stick Wild Adv (1)  <b>Used: 27</b>
July 21	22	23	24	25	26	27
AK Peak&Sea (10) Breakaway (12) Sunrise (10)  <b>Used: 32</b>	Bluewater (8) Breakaway (5) Muddy Water (6) Stick Wild Adv (5) Sunrise (10)  <b>Used: 34</b>	AK Chart&Adv (5) AK Waters (9) Breakaway (8) Carlin Air (6) Sumdum (7)  <b>Used: 35</b>	AK Chart&Adv (1) AK Waters (12) Breakaway (6) Stick Wild Adv (3)  <b>Used: 22</b>	AK Waters (7) Breakaway (10) Stick Wild Adv (6)  <b>Used: 23</b>	AK Vistas (4) Aqua Sports (5) Breakaway (11) Sunrise (4)  <b>Used: 24</b>	AK Chart&Adv (6) AK Vistas (2) AK Waters (10) Breakaway (4) Carlin Air (6) SE Aviation (6)  <b>Used: 34</b>

<sup>27</sup> Data provided by Wrangell Ranger District.

July 28	29	30	31	August 1	2	3
AK Waters (5) Bluewater (10) Breakaway (4) Family Air (2) Muddy Water (7) Stik Wild Adv (3)  <b>Used: 31</b>	AK Chart&Adv (6) AK Waters (10) Aqua Sports (2) Breakaway (9) Carlin Air (6) Family Air (3)  <b>Used: 36</b>	AK Chart&Adv (4) AK Vistas (2) AK Waters (9) Breakaway (14) SE Aviation (4)  <b>Used: 33</b>	AK Waters (3) Breakaway (5) Carlin Air (6) SE Aviation (6) Stick Wild Adv (2) Sunrise (9)  <b>Used: 31</b>	AK Chart&Adv (7) AK Waters (9) Aqua Sports (6) Carlin Air (6) Family Air (4) Stick Wild Adv (4)  <b>Used: 36</b>	AK Peak&Sea (10) AK Vistas (5) Aqua Sports (5) Stick Wild Adv (6) Sunrise (10)  <b>Used: 36</b>	AK Vistas (10) SE Aviation (4) Stick Wild Adv (4) Taquan (10)  <b>Used: 28</b>
August 4	5	6	7	8	9	10
AK Vistas (6) AK Waters (10) Family Air (4) Muddy Water (6) Stick Wild Adv (8)  <b>Used: 34</b>	Aqua Sports (10) Breakaway (6) Carlin Air (2) Family Air (4) Muddy Water (6) Stick Wild Adv (5)  <b>Used: 33</b>	AK Waters (10) All Aboard (10) Aqua Sports (4) Family Air (6) Stick Wild Adv (6)  <b>Used: 36</b>	AK Waters (4) Aqua Sports (7) SE Aviation (4) StickWildAdv (10)  <b>Used: 25</b>	AK Vistas (10) Aqua Sports (10) Family Air (2) StickWildAdv (16)  <b>Used: 38</b>	AK Chart&Adv (3) AK Peak&Sea(4) AK Waters (7) Aqua Sports (3) Family Air (2) StickWildAdv (8) Sunrise (10)  <b>Used: 37</b>	AK Chart&Adv (4) AK Waters (2) Aqua Sports (5) Family Air (4) Muddy Water (2) StickWildAdv (4)  <b>Used: 21</b>
August 11	12	13	14	15	16	17
AK Waters (10) All Aboard (12) Bluewater (10) Breakaway (2) Muddy Water (2)  <b>Used: 36</b>	AK Chart&Adv (4) Aqua Sports (6) Breakaway (9) Family Air (4) Muddy Water (6) Stick Wild Adv (4)  <b>Used: 33</b>	AK Vistas (8) Aqua Sports (8) Muddy Water (6) StickWildAdv (10)  <b>Used: 32</b>	AK Vistas (7) AK Waters (6) Aqua Sports (6) Bluewater (10) Breakaway (2) Stick Wild Adv (3)  <b>Used: 34</b>	Aqua Sports (10) Muddy Water (6) SE Aviation (10) StickWildAdv (10)  <b>Used: 36</b>	AK Waters (6) Breakaway (18) Dolphin (8) StickWildAdv (2)  <b>Used: 34</b>	AK Chart&Adv (5) AK Waters (10) Aqua Sports (6) Breakaway (9) Stick Wild Adv (4)  <b>Used: 34</b>
August 18	19	20	21	22	23	24
AK Chart &Adv (6) Aqua Sports (3)  <b>Used: 9</b>	       <b>Used: 0</b>	       <b>Used: 0</b>	AK Waters (10) Dolphin (8)     <b>Used: 18</b>	AK Vistas (10) Alaska Waters (6) StikWildAdv (8)   <b>Used: 24</b>	AK Waters (1) Breakaway (14)     <b>Used: 15</b>	AK Vistas (5) Aqua Sports (9) Breakaway (6) Muddy Water (6) StickWildAdv (10)  <b>Used: 36</b>
August 25	26	27	28	29	30	31
AK Vistas (3) Aqua Sports (1) Breakaway (9) SE Aviation (7)  <b>Used: 20</b>						

## Methodology

Visitor industry employment comes from the Alaska Department of Labor, and self-employment data from the US Census. Cruise Line Agencies of Alaska provided cruise passenger volume figures for the mid-sized cruise ships. The City and Borough of Wrangell provided small cruise ship capacity figures and yacht traffic information. Air visitor volume was based on passenger arrival statistics from the Bureau of Transportation. The Alaska Marine Highway System provided the number of people who arrived in Wrangell by ferry.

Visitor spending was estimated by applying average spending by transportation mode (cruise, air, ferry) to visitor volume figures. Average spending was estimated using passenger arrival numbers, visitor industry provider interviews and data, sales tax data, Nolan Center receipts, hotel room transient tax data, and analysis of the Alaska Visitor Statistics Program VII.

Anan, Stikine, and LeConte visitor information was derived from interviews with tour providers, data and interviews with the Forest Service, and review of ISER's publication, "Nature-Based Tourism in Southeast Alaska."



Petroglyph near Wrangell by D. Douglass

# Sources

- Alaska Department of Labor Employment & Wage data. Regional economist provided Wrangell Visitor-Related Employment numbers.
- US Census Nonemployer (self-employment) Statistics
- Cruise Line Agencies of Alaska
- US Bureau of Transportation Statistics (RITA)
- Alaska Marine Highway System
- Datasets provided by the City and Borough of Wrangell included the following: yacht activity, hotel room transient tax data, sales tax data, cruise ships port of call schedule, retail sales by the Nolan Center, etc.
- Alaska Department of Labor and Workforce Development, Research and Analysis Section. Seafood Processing Workforce by Borough or Census Area.
- Alaska Department of Labor. Trends Magazine September 2014. The City of Wrangell. Conor Bell.
- Economic Impact of Visitors to Southeast Alaska 2010-11. Prepared by McDowell Group for the Alaska Wilderness League, August 2012. [http://www.alaskawild.org/wp-content/uploads/mcdowell\\_report\\_final.pdf](http://www.alaskawild.org/wp-content/uploads/mcdowell_report_final.pdf)
- Alaska Visitor Statistics Program VII: Summer 2016. Conducted by McDowell Group for Alaska Department of Commerce, Community and Economic Development. <http://commerce.alaska.gov/ded/dev/toubus/research.htm>
- Nature-Based Tourism in Southeast Alaska. Darcy Dugan Ginny Fay Hannah Griego Steve Colt. ISER Paper, March 2009
- Institute of Social and Economic Research University of Alaska Anchorage [http://www.iser.uaa.alaska.edu/Publications/workingpapers/WP2009%201\\_SEnbt\\_final.pdf](http://www.iser.uaa.alaska.edu/Publications/workingpapers/WP2009%201_SEnbt_final.pdf)

## **Executive Interviews and Dataset Providers 2017**

- Alaska Peak & Seas—Mark Galla
- Alaska Charters & Adventures—Brenda Schwartz-Yeager
- Alaska Waters—Jim Leslie
- Breakaway Adventures—Eric Yancey
- Muddy Water Adventures—Zach Taylor
- Fish Wrangell—Marlin Benedict
- Summit Charters—John Taylor
- Alaska Vistas; Stickeen Wilderness Adventures—Sylvia Ettefagh
- Aqua Sports Enterprises—Terry Bunes
- Forest Service Wrangell Ranger District—Dee Galla
- Wrangell Economic Development Director—Carol Rushmore
- Marjy Wood—Stikine River Jetboat Association

## **Additional interviews used for this analysis conducted in 2015**

- Southeast Alaska Fly Fishing—Dan Roope
- Stikine Inn—Bill Goodale
- Forest Service Wrangell Ranger District, District Ranger—Robert J. Dalrymple
- Wrangell Harbor Master—Greg Meissner
- Nolan Center—Terri Henson
- U.S. Forest Service Special Use Administrator—Diane C. O'Brien