

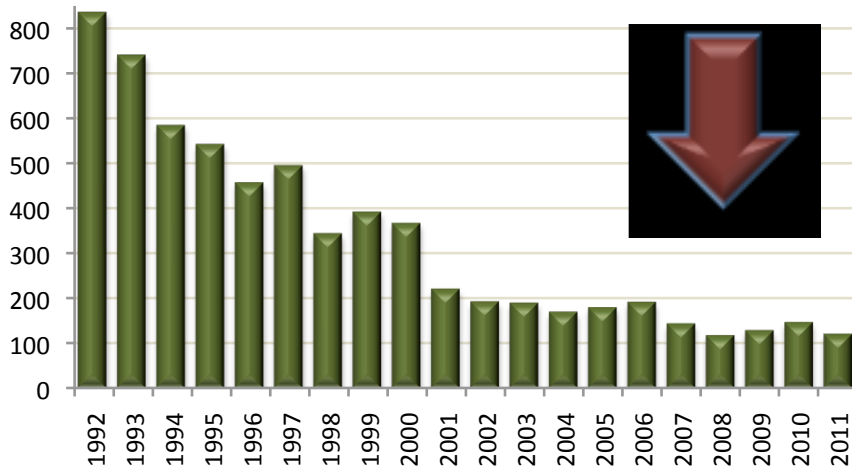
Southeast Alaska by the Numbers 2012



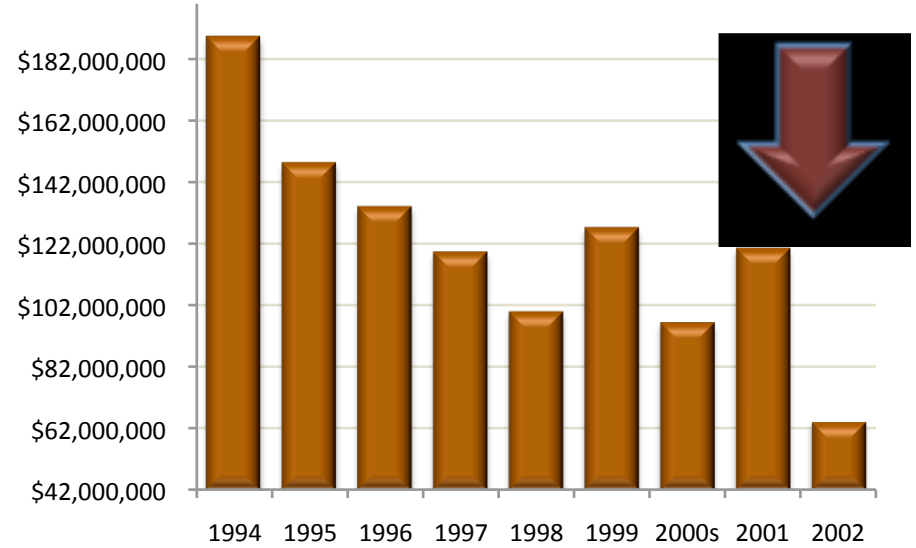
A  Sheinberg Associates presentation for Southeast Conference

Where We Have Been: Past 15-20 Years

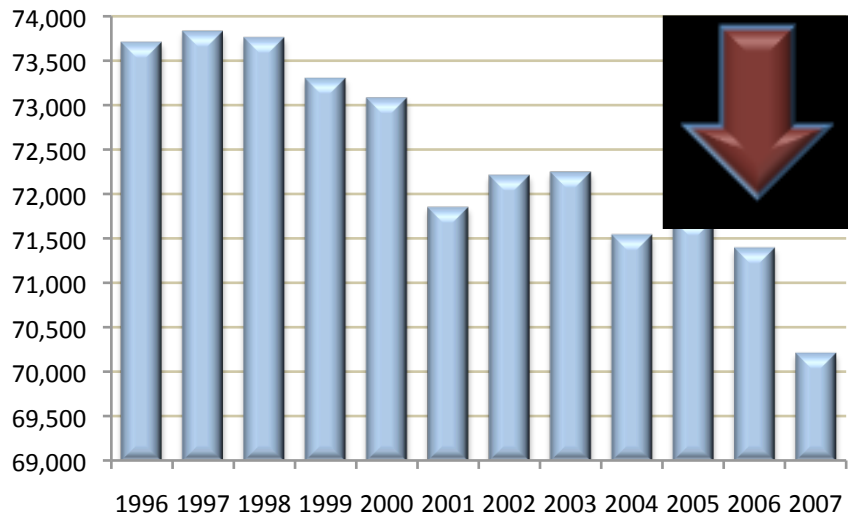
Timber Harvest



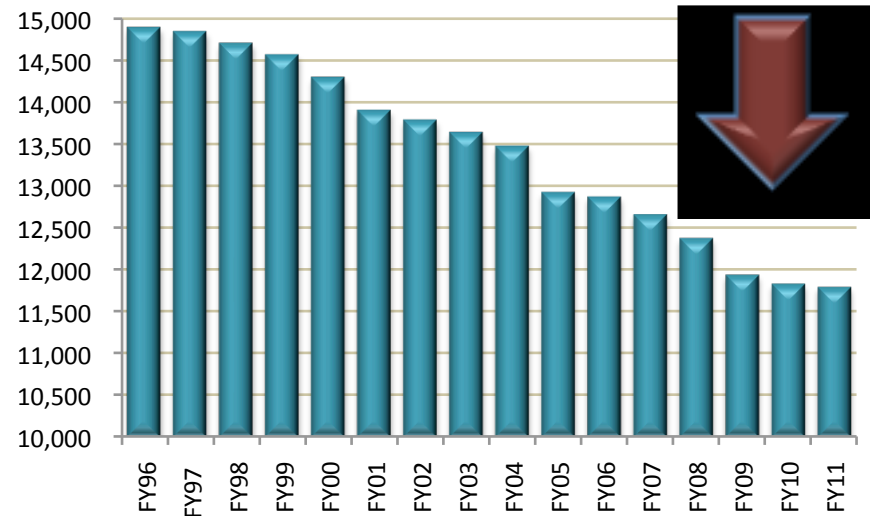
Salmon Values



Region Population



Student Enrollment



The Past 5 Years at a Glance



- Population
- Employment
- Wages
- State & Local Government
- Seafood Industry
- Health Care
- Mining
- Home Values



- Unemployment up
- Visitor Employment
- Visitors
- Housing Starts
- Timber Industry
- Federal Employment



2011 at a Glance

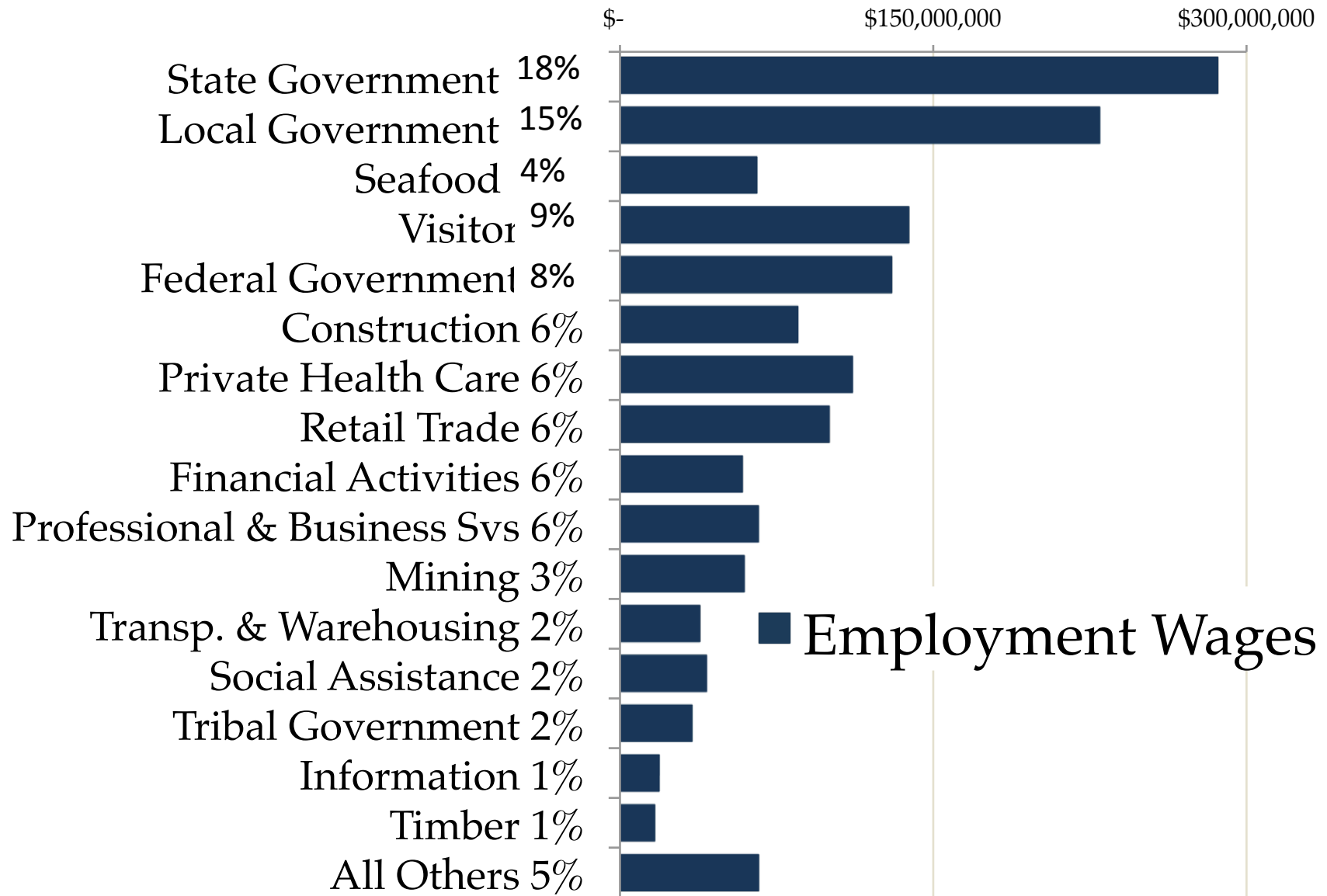


- Population
- Employment
- Wages
- State & Local Government
- Seafood Industry
- Health Care
- Mining
- Home Values
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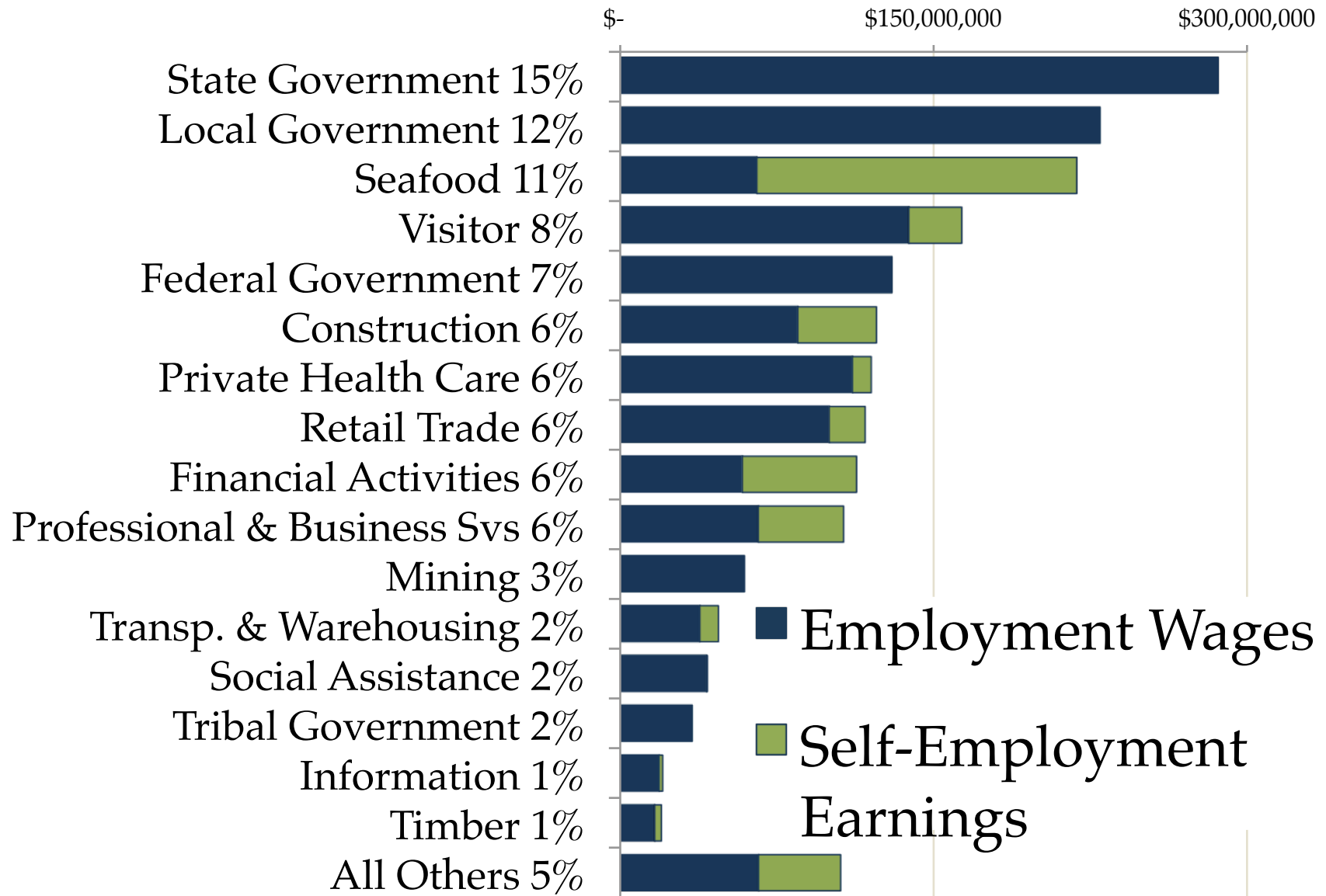


- Federal Employment

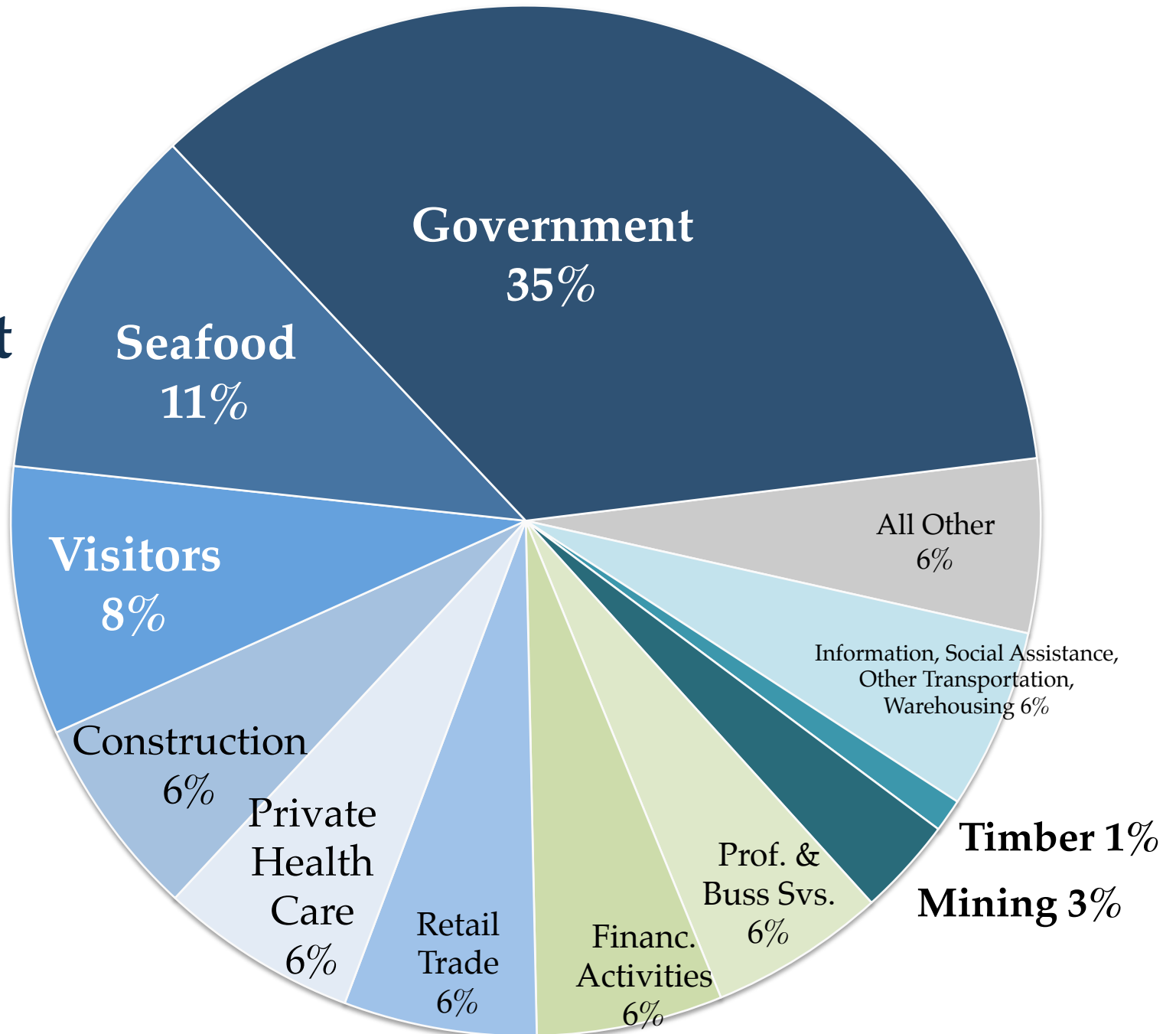
Measuring the Whole Economy



Measuring the Whole Economy



**Annual
Average
Southeast
Alaska
2011
Industry
by
Earnings**



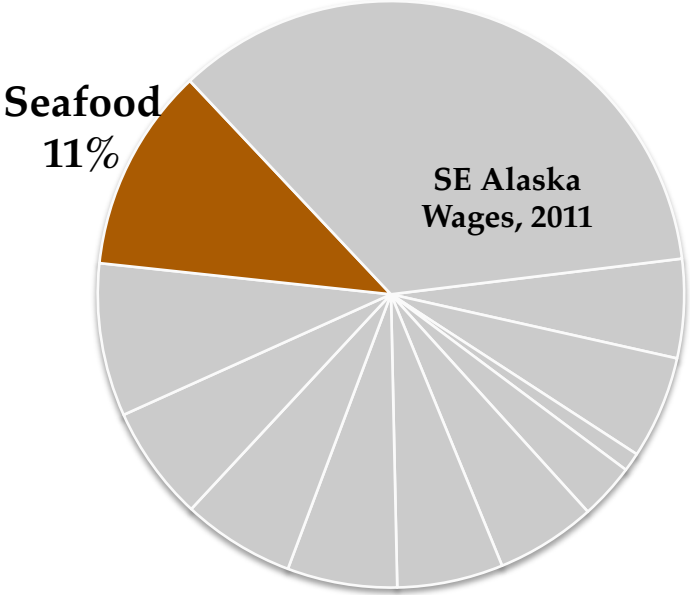


Southeast Alaska Seafood Industry

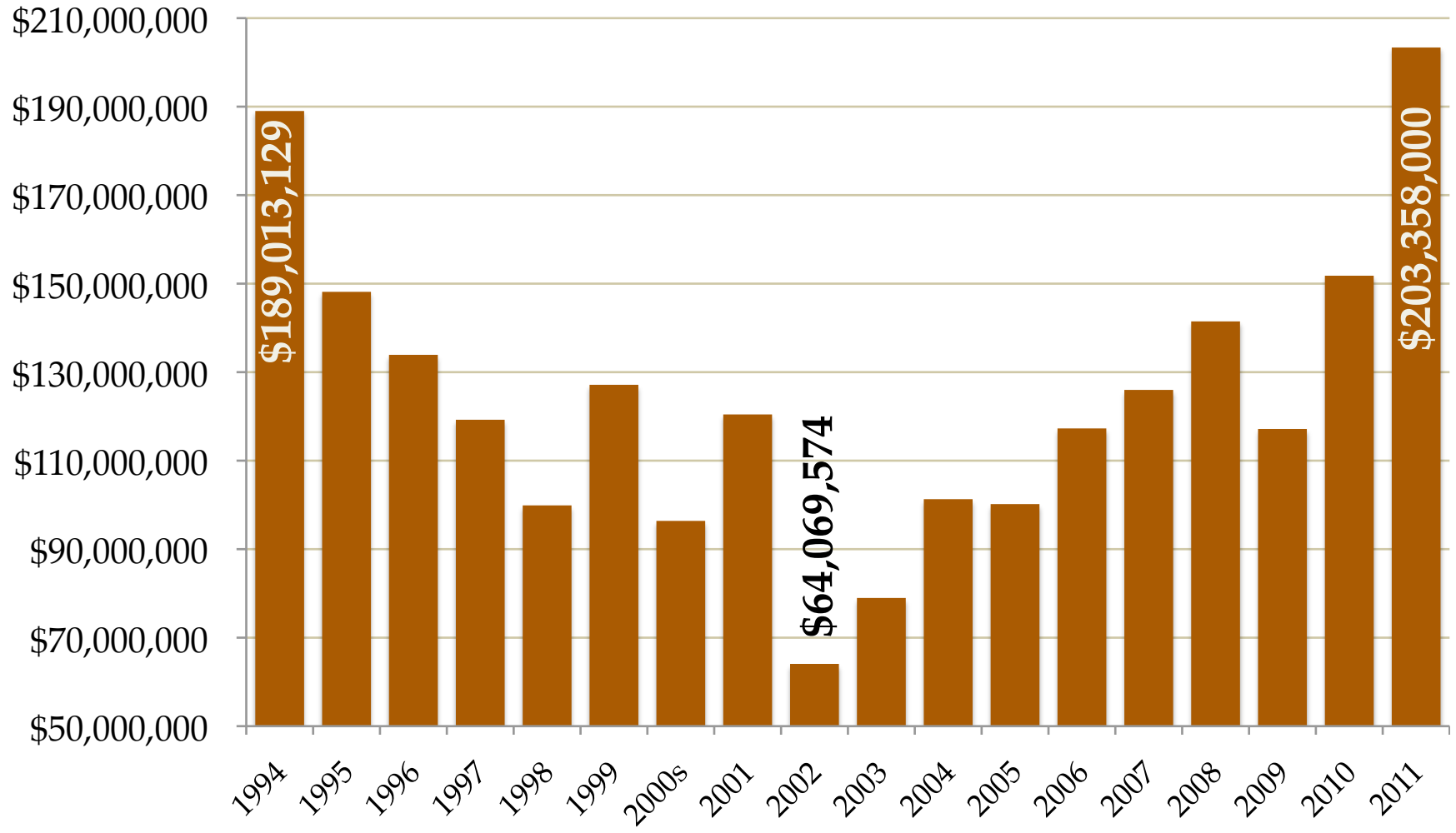


Up 150 jobs over 5 years +4%

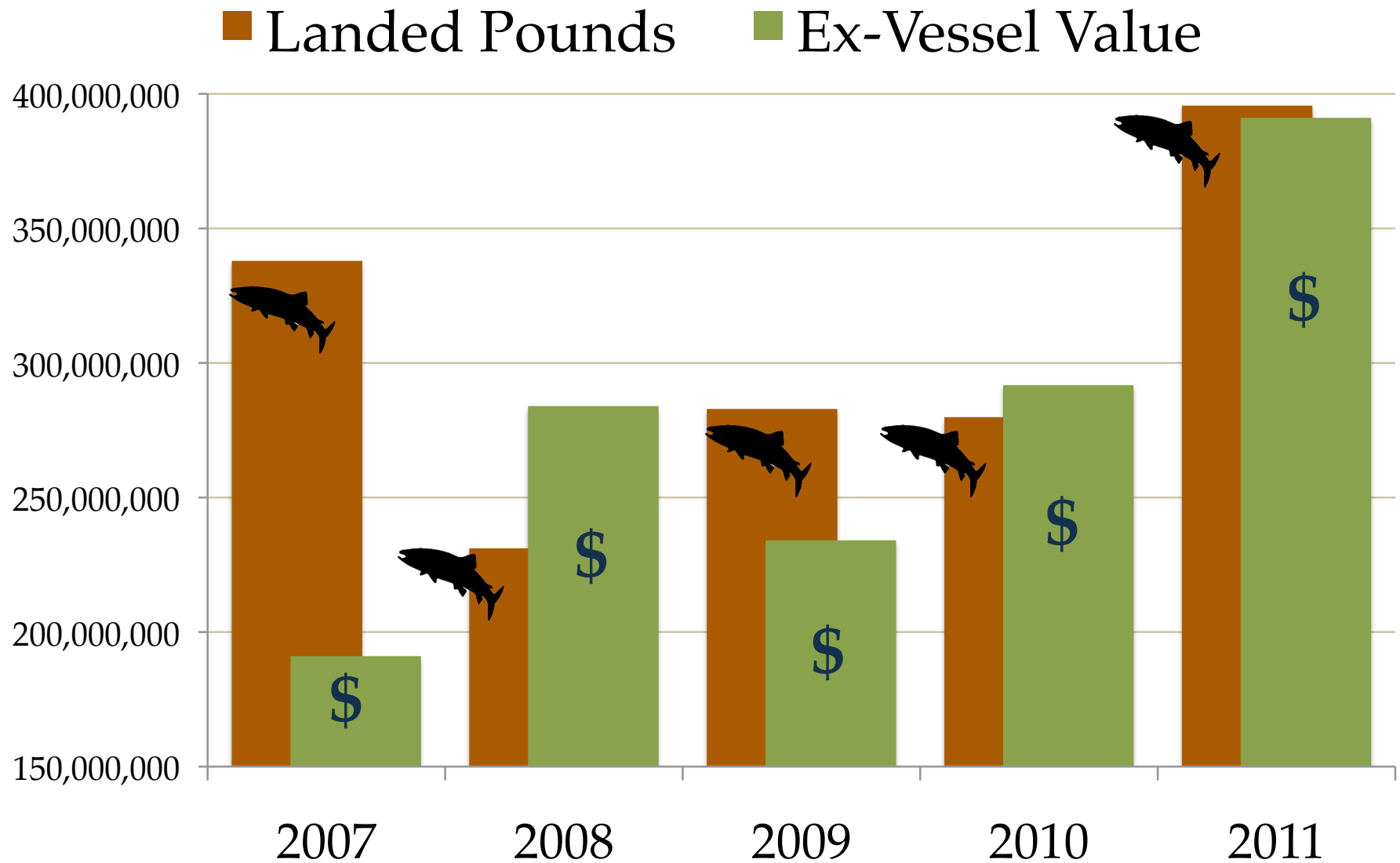
Total Earnings \$219 million
Total Workforce 4,200



Inflation adjusted Ex-Vessel Value For Southeast Salmon 1994-2011



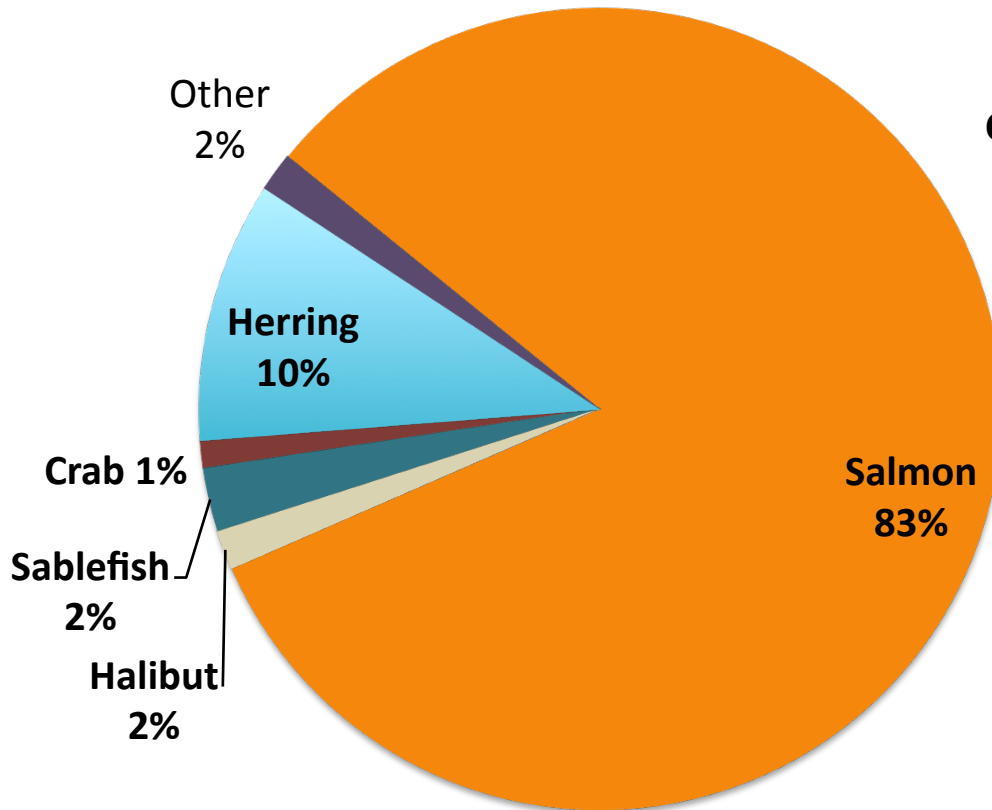
Total Harvest vs. Total Ex-Vessel Value 2007-2011



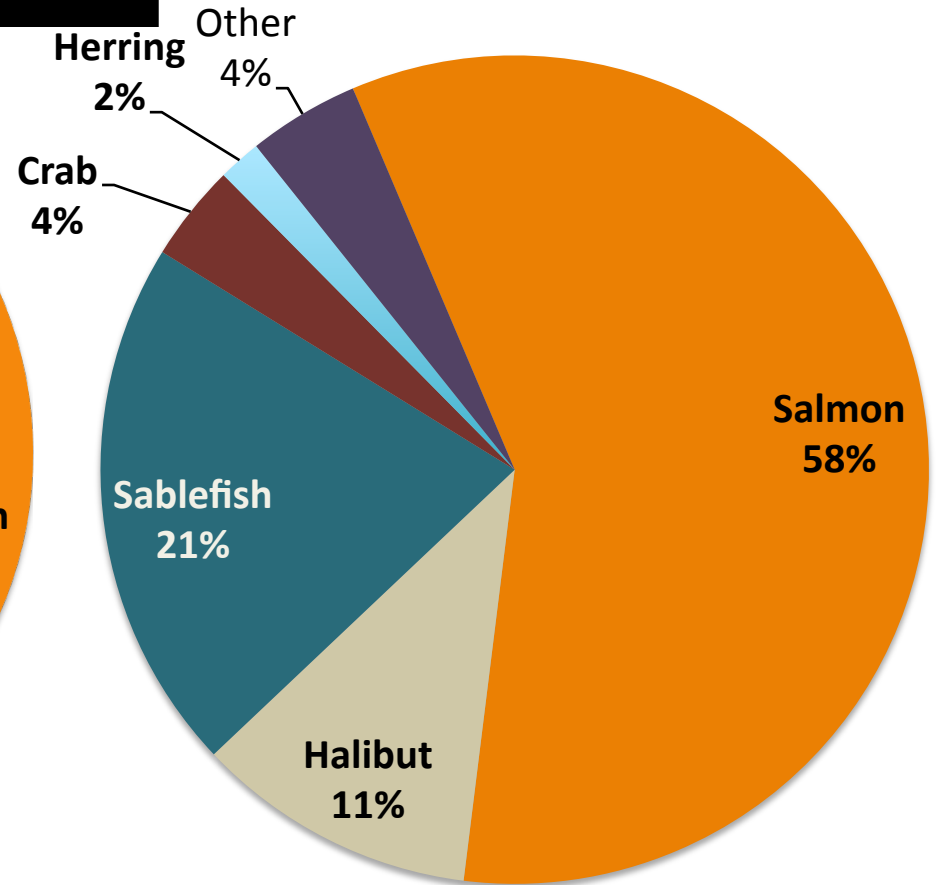
Total Harvest vs. Total Ex-Vessel Value



2011 Pounds Landed
Total Harvest 396 million pounds
+41%



2011 Ex-Vessel Value
Total Value \$391 million +34%



Outlook



Photo used by permission of PeaceHealth Ketchikan Medical Center.

Southeast's Maritime Sector



**Ship and boat building and repair up 181%
in 5 years**

Ketchikan Marine Industry Council researchers have determined that the marine industry sector is comprised of 175 separate 6-digit NAICS categories



Outlook

Southeast Alaska Mining Industry



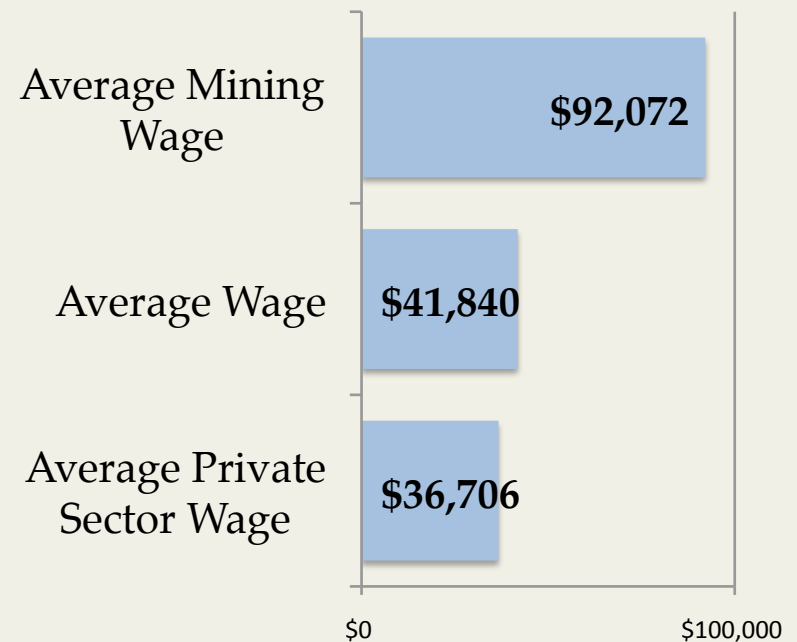
Up 240 jobs over 5 years
+58%

- Total Earnings \$60 million
- Total Workforce 650



Outlook

Southeast Wages 2012



Price of Gold 2000 to 2012

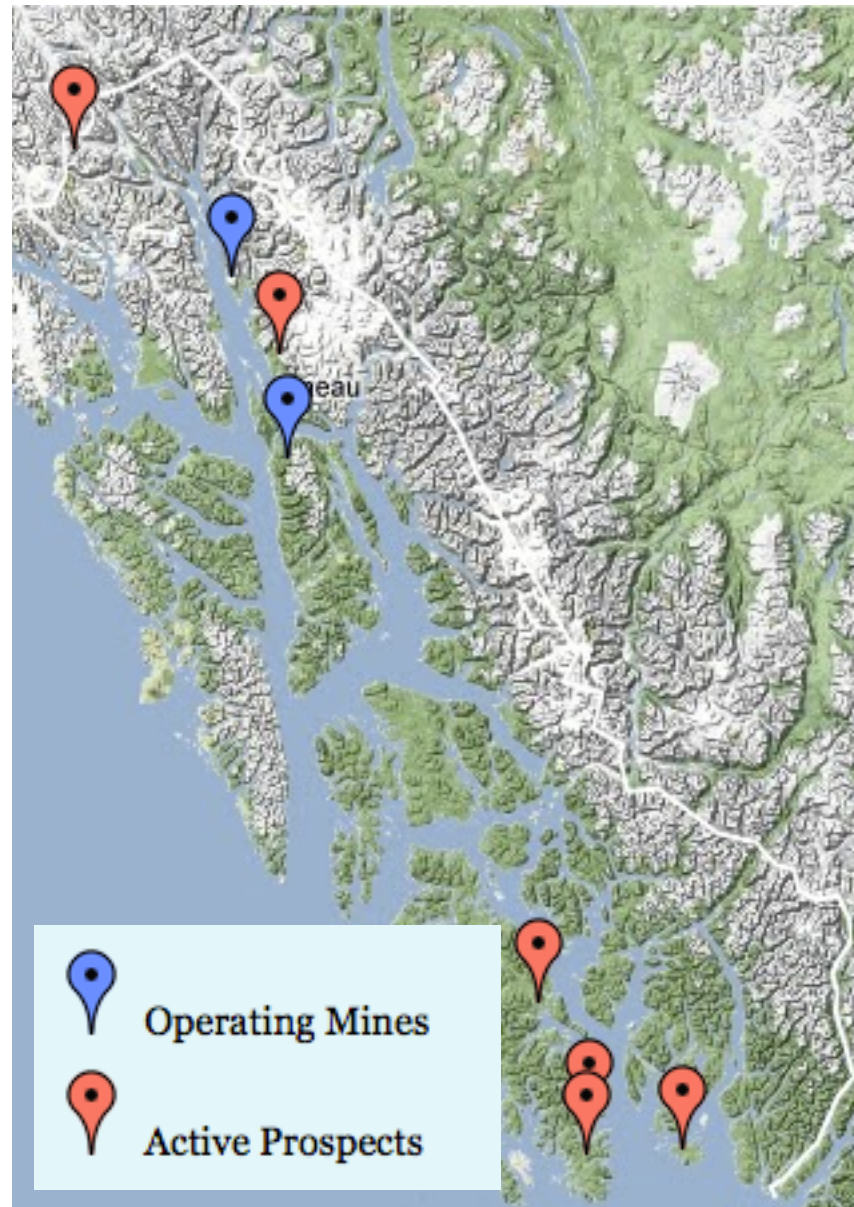


YESTERDAY= \$1,785

Active Mines and Exploration 2012

Significant activity in Southeast Alaska includes:

- Greens Creek
- Kensington
- Herbert Glacier Project
- Alaska Juneau (AJ)
- Bokan Mountain
- Niblack Project
- Palmer Project
- Poorman Prospect
- Woewodski
- Zarembo
- Admiral Calder
Calcium Carbonate
Mine



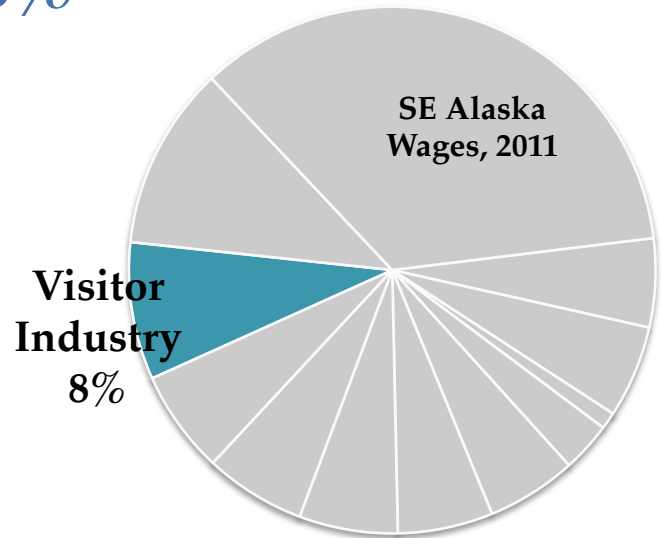


Southeast Alaska Visitor Industry



Down 360 jobs over 5 years -6%

- **Total Earnings \$164 million**
- **Total Workforce 6,000**



Visitor Industry Outlook

Southeast Alaska Cruise Passengers 2000 to 2012

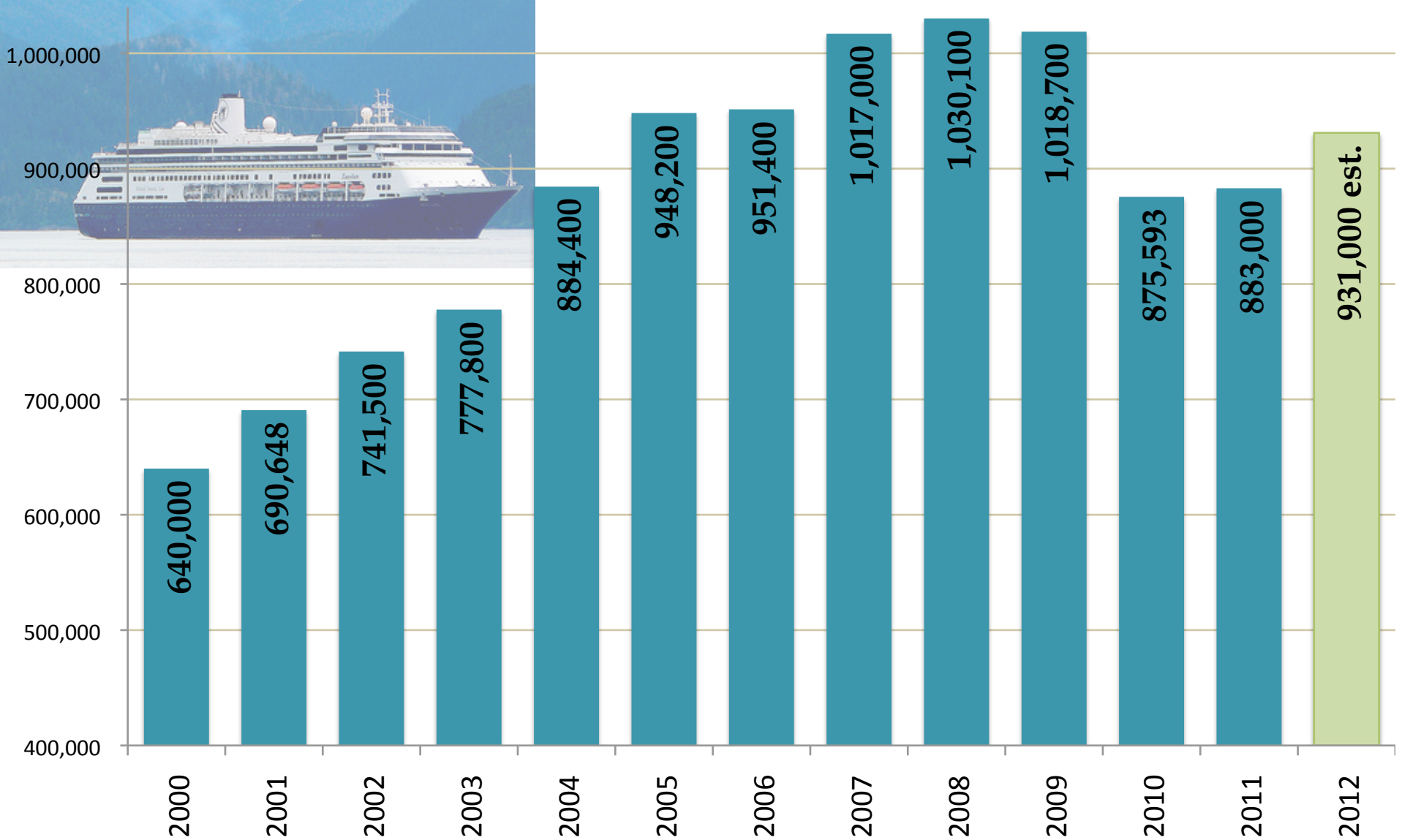




Photo used by permission of PeaceHealth Ketchikan Medical Center.



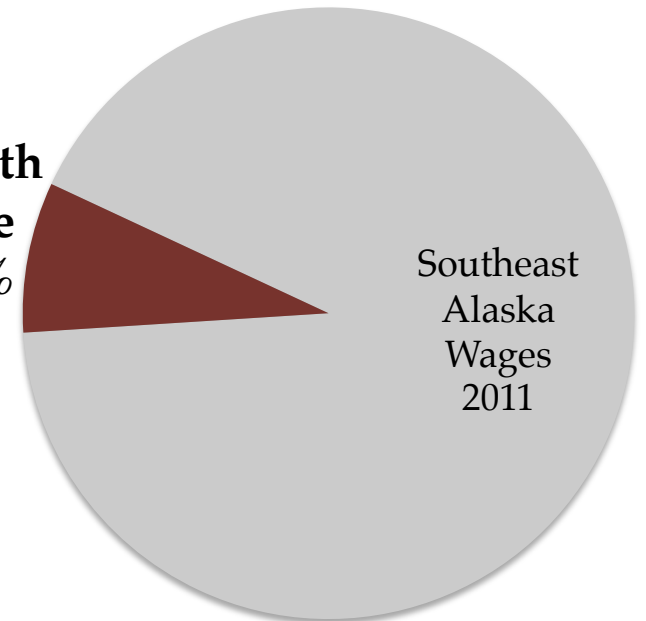
Up 250 jobs over 5 years +8%

- **Total Earnings \$164 million**
- **Total Workforce 3,400**



Outlook

**Health
Care
8.6%**



**Southeast
Alaska
Wages
2011**



Demographics

Photo used by permission of PeaceHealth Ketchikan Medical Center.



Total Population 73,526

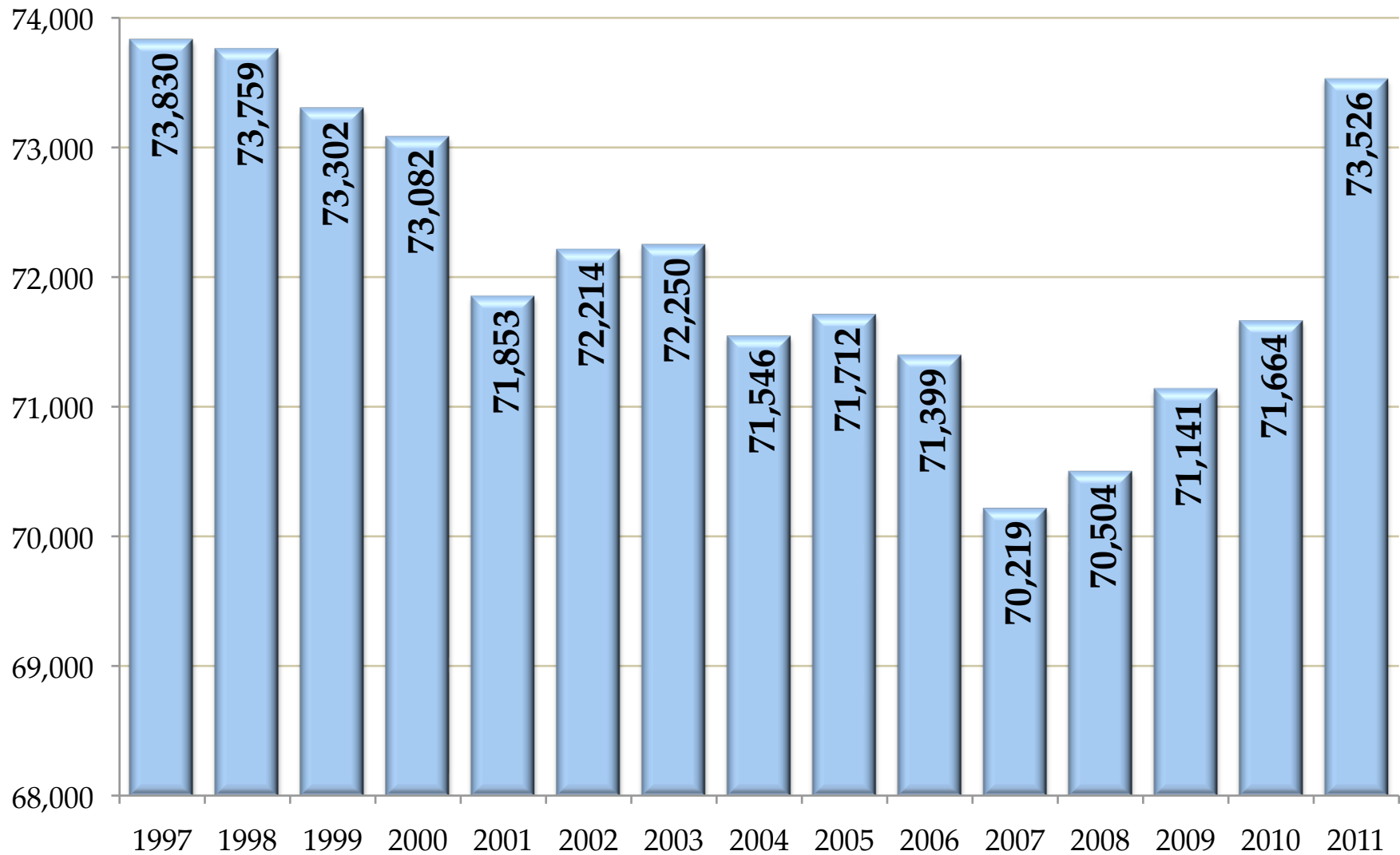
Up 2,300 people over 5 years +3%

- **Under five year olds +15% since 2007**
- **First enrollment gain since 1996**
- **Region continues to age**



Outlook

Southeast Regional Population 1997-2011



Southeast Alaska Government

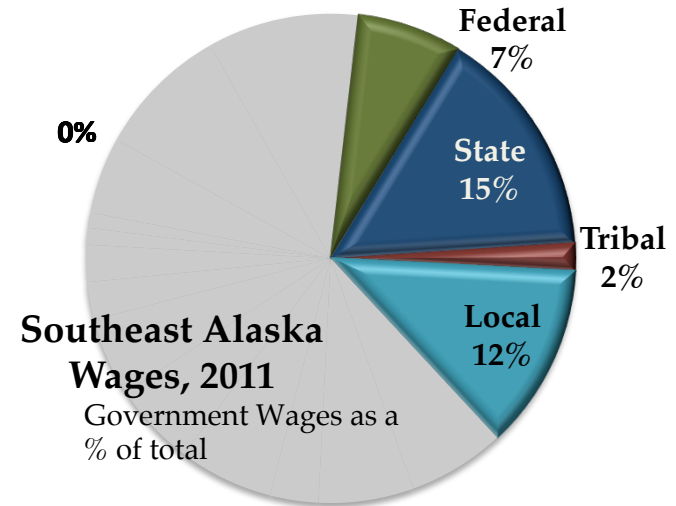


Up 559 jobs over 5 years +4%



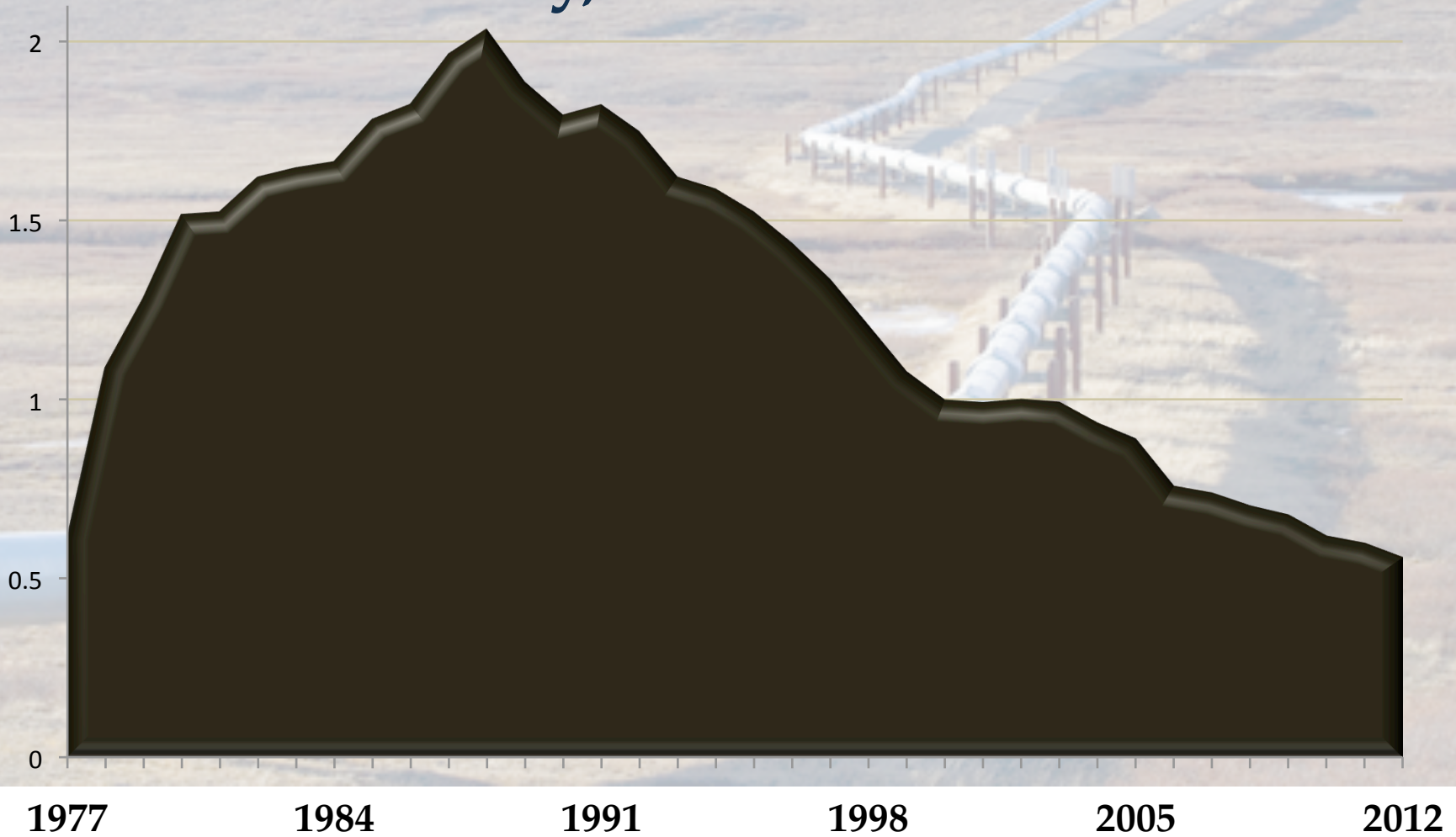
- State +26 jobs
- Federal -36 jobs
- local /Tribal +569 jobs

Total Earnings \$680 million
Total Workforce 13,350



GOVERNMENT
OUTLOOK

Avg. Daily Volume of the Trans Alaska Pipeline System in Millions of Barrels a day, 1977-2012

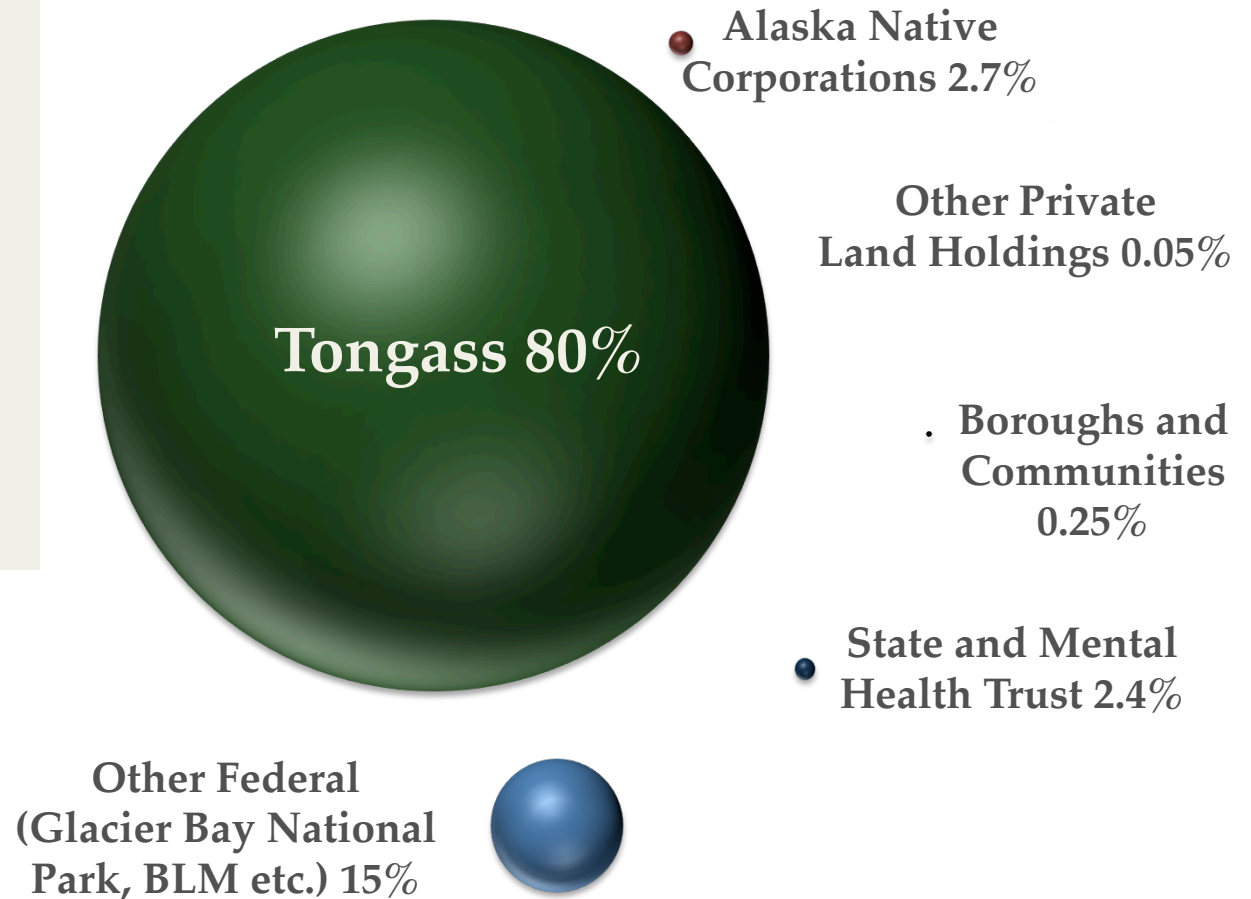


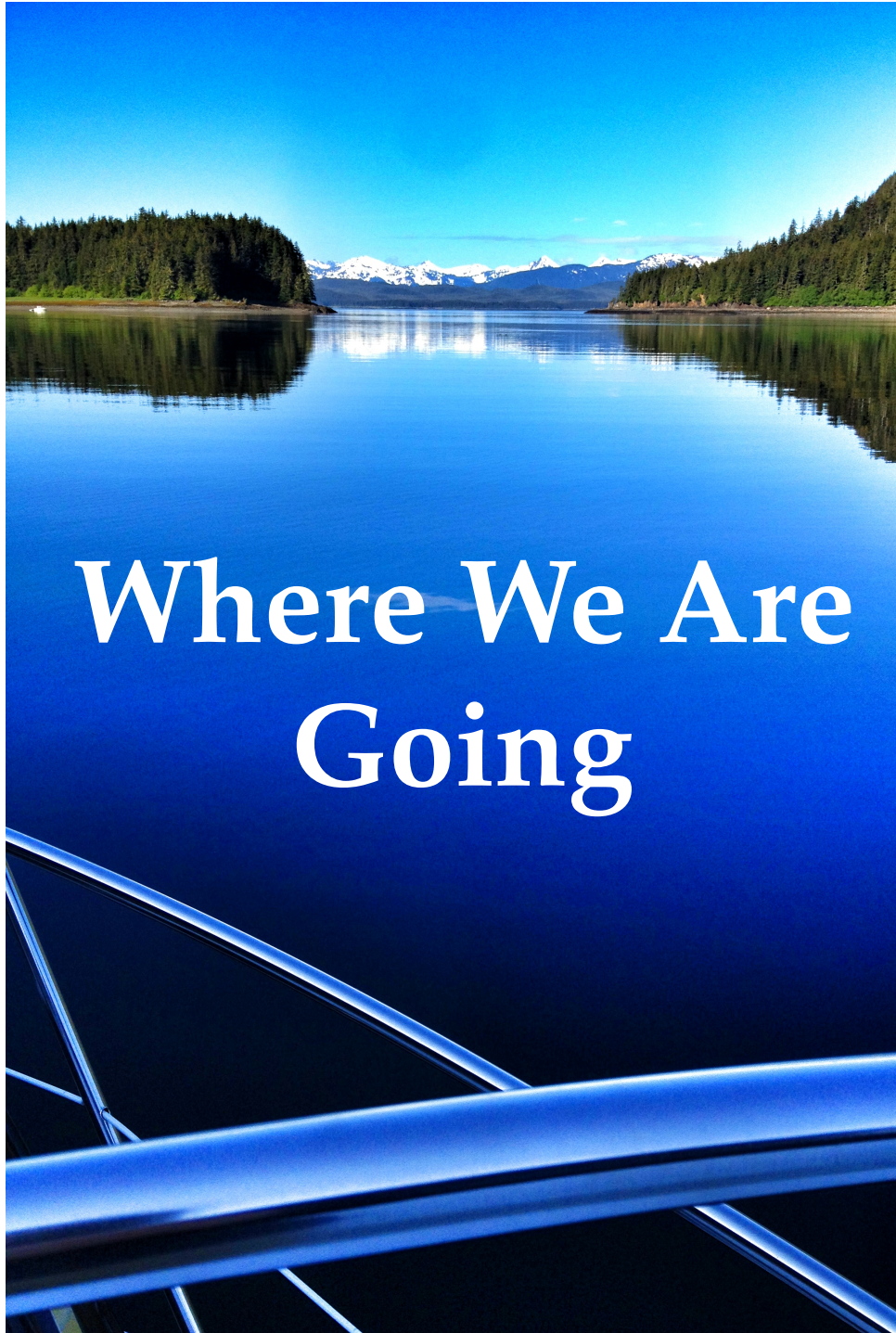
Southeast Alaska Lands

Southeast Alaska Land Ownership

Circle size = Number of Acres

Nationally, just 28% of all lands are managed by the federal Government, while 61% are privately owned





Where We Are Going

Projections 2012-2013



- Population
- Total Employment
- Total Wages
- Visitors
- Visitor Industry Jobs
- Health Care Jobs
- Mining Industry
- Marine Sector

-
- Seafood



- Government Spending
- Federal Employment
- Oil Production

50 Sources, 100+ Reports and Data Sets

- **Alaska Department of Labor (ADOL)**
- **US Census Nonemployer Statistics**
- U.S. Bureau of Economic Analysis (BEA)
- Alaska Department of Education and Early Development
- US Census
- American Community Survey
- ADF&G
- COAR
- NOAA
- McDowell Group
- US Bureau of Transportation Statistics
- Alaska Marine Highway System
- Administration
- Alyeska Pipeline Service Company
- Alaska Department of Revenue
- ISER
- US Forest Service
- Cruise Line Agencies of Alaska
- Alaska Department of Environmental Conservation
- Kitco Metals Inc
- Coeur D'alene Mines Corporation
- Yukuskokon Professional Services
- Ucore Uranium Inc.
- Alaska Miners Association
- Hecla Greens Creek Mining Company
- PeaceHealth Ketchikan Medical Center
- Alaska Forest Association
- Alaska Ship and Drydock
- Ketchikan Marine Industry Council
- Southeast Conference
- Resources First Foundation
- Alaska Legislature Reports
- Juneau Economic Development Organization
- Alaska Industrial Development & Export Authority
- City of Tenakee Springs
- Yakutat Power
- AEL&P
- U.S. Energy Information Administration.
- Alaska Map Company
- Ketchikan Gateway Borough Planning and Community Development
- Alaska Department of Commerce, Community, & Economic Development
Division of Economic Development

Who We Are: Sheinberg Associates

- Community & Strategic Planning
- Research
- Facilitation
- Public Engagement Services
- Publications



Barbara Sheinberg, AICP
Principal, Senior Planner



Meilani Schijvens
Research Analyst



Donovan Bell
Business Analyst

Thank You

