



ASSEMBLY LANDS HOUSING AND ECONOMIC DEVELOPMENT AGENDA

January 29, 2024 at 5:00 PM

Assembly Chambers/Zoom Webinar

<https://juneau.zoom.us/j/94215342992> or 1-253-215-8782 Webinar ID: 942 1534 2992

A. CALL TO ORDER

B. LAND ACKNOWLEDGEMENT

We would like to acknowledge that the City and Borough of Juneau is on Tlingit land and wish to honor the indigenous people of this land. For more than ten thousand years, Alaska Native people have been and continue to be integral to the well-being of our community. We are grateful to be in this place, a part of this community, and to honor the culture, traditions, and resilience of the Tlingit people. Gunalchéesh!

C. ROLL CALL

D. APPROVAL OF AGENDA

E. APPROVAL OF MINUTES - December 18, 2023 Draft Minutes

1. December 18, 2023 Draft Minutes

F. AGENDA TOPICS

2. Mobile Home Down Payment Assistance Program Updates

3. Sandberg Request to Purchase City Property

G. STAFF REPORTS

4. 2023 Tourism Survey Results

H. STANDING COMMITTEE TOPICS

5. LHED Committee Goals

6. Telephone Hill Updates

I. COMMITTEE MEMBER / LIAISON COMMENTS AND QUESTIONS

J. NEXT MEETING DATE - February 26, 2024

K. ADJOURNMENT

ADA accommodations available upon request: Please contact the Clerk's office 36 hours prior to any meeting so arrangements can be made for closed captioning or sign language interpreter services depending on the meeting format. The Clerk's office telephone number is 586-5278, TDD 586-5351, e-mail: city.clerk@juneau.gov.

ASSEMBLY LANDS HOUSING AND ECONOMIC DEVELOPMENT MINUTES

December 18, 2023 at 5:00 PM

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A. ROLL CALL

Members Present: Chair Alicia Hughes-Skandijs, Wáahlaal Gíidaak, Greg Smith, Paul Kelly

Members Absent: none

Liaisons Present: Mandy Cole, Planning Commission; Chris Mertl, PRAC

Liaisons Absent: Jim Becker, Docks & Harbors Committee

Staff Present: Dan Bleidorn, Lands Manager; Roxie Duckworth, Lands & Resources Specialist

D. APPROVAL OF AGENDA – approved as presented

E. APPROVAL OF MINUTES - November 6, 2023 Draft Minutes – approved as presented

F. AGENDA TOPICS

2. LeMann Bluff LLC Application to Purchase CBJ Property located on USS 4694 Juneau Indian Village
Mr. Bleidorn discussed this topic.

Mr. Mertl commented that we've gone through this process before in the past. When we get an application do they get sole source for purchasing the property, or does the property go out for general advertisement to let the public know it's for sale. Is it first person that shows up and can purchase these properties outright? Mr. Bleidorn replied that it is to be determined by the assembly. At this point, the city manager has received an application, and it has all the necessary information included to be deemed complete, and then the assembly can determine, as a new business item, to work with your original proposal, where we'd work and start negotiations with them and start the process of an appraisal and any other site work that we need to get done. Other options would be to determine if it is in the city's best interest to retain this property at this time until either some other catalyst moves us to move forward with it or retain it if there is public use or determination that the city needed it. The third option would be to open it up to some type of competitive process. In this case, the properties really do not have any road frontage and most of the city owned property here is very steep. If we're going to go out to some type of competitive sale, it would be more likely that we'd be having another neighbor that was interested in it, because the general public couldn't really build anything on this property due to the size and the shape, it's not really conducive to housing. There's another part to this request that is for an isolated right-of-way (ROW), an undeveloped ROW, undeveloped road that has no connection to other existing roads, it's not connected to Capital Ave or Village Street. A ROW vacation has its own process through the Engineering department because the city doesn't own ROWs. They are not sold like a piece of property, it's independent. That was included in the application, and we're also working with the applicant to follow through that process for the ROW vacation.

Wáahlaal Gíidaak asked what the process is in terms of our recommendation to the full assembly, do we recommend now whether or not we want it to be competitive or non-competitive or does that come at the full assembly level? Mr. Bleidorn replied that staff in the past have gone both ways. If it's something where there's no adjacent neighbor, there's no other ROW close by, where it would make sense to work specifically with the applicant at that stage. At this point I was uncomfortable making that recommendation to this committee because I want to hear from some of the neighbors, we're still collecting information, and waiting for review. I think by the time this goes to the assembly as new business we'll be in a situation where we can provide some additional direction as staff.

Mr. Smith commented that he was looking at this downtown location, near where the tribe has had some recent investments and land. Would this potentially be desirable to somebody else? I understands the applicant's desire to keep it clean but was questioning whether doing cleanup is a reason enough to

dispose of land. Could there be potential projects or something in that area if we either held onto it or if anyone else was interested in it. Mr. Smith likes the motion in the packet. Chair Hughes-Skandijs noted that she has the same concerns and appreciates the Staff's recommendation and could see this being an open request to see what the neighbors think, especially that these were foreclosures.

Mr. Smith moved that staff request the Lands Housing and Economic Development Committee to forward this application to the full Assembly to be reviewed for a determination of whether the proposal should be further considered and, if so, whether by direct negotiation with the original proposer or by competition after an invitation for further proposals in accordance with 53.09.260(a). Motion passed unanimously.

3. Request to Continue to Lease CBJ property located at U.S. Survey 3760 for a Parking Lot
Mr. Bleidorn discussed this topic. No committee discussion.

Wáahlaal Gíidaak moved that that staff request the Lands Housing and Economic Development Committee to provide a motion of support for renewing a lease of CBJ property to Amalga and Huffman Harbors Community Association for a parking lot. Motion passed unanimously.

G. STAFF REPORTS

4. 520 Sixth Street Foreclosure Verbal Update
Mr. Bleidorn discussed this topic. Chair Hughes-Skandijs asked about the foreclosure process, that there is no financial incentive. We're not rushing for a closure process. Mr. Bleidorn replied that it goes to the previous owners and added that the process for this ordinance is going to be proposing a sealed competitive bid sale, which we'll set a minimum bid for the price, and then there'll be a window of 45 days for the application to be out there to collect bids. We'll provide a bid form, a brochure, and then we'll open all the bids at the end, and the highest bid will get it.
5. Telephone Hill Land Redevelopment Study Update
Mr. Bleidorn discussed this topic. PC Cole asked how maintenance has been conducted on these properties for the last two decades, who's responsible for that, and what kind of records were kept. Mr. Bleidorn replied that the city hasn't had ownership for very long and acquired this property in March of 2023. The city's approach has been to hire a professional property manager that works with residents on site to try to mitigate concerns. Building maintenance prior to that was done by some residents of the Hill that had formed what they called a neighborhood nonprofit but was neither a neighborhood association nor a nonprofit. They did work on structures but record keeping seems to have been nonexistent. I have not found a great record of maintaining these structures since the State first acquired them in the 1980s.

Mr. Kelly asked how this survey is going to fit into the general scheme of how we're taking public input. Before he was sworn into the assembly, Mr. Kelly attended two meetings held by our consultant. In the second meeting it didn't seem like people were interested in any of the four options that were available to them. He was wondering how this survey would fit into how we're receiving public input and if there's any way for the for people who might have an idea that's outside of the basic four options to weigh in. Mr. Bleidorn replied that the report that I'm requesting that all of you take some time to read about has value as far as the process goes. At some point the assembly is going to determine how to move forward with this site. If you're thinking about preservation, knowing the structure as it exists today might weigh on your consciousness if you're thinking about trying to keep these properties alive. The second part of that question was related to the majority at those meetings. I agree that most of the people who attended those meetings were either residents of Telephone Hill or had a history with the Hill. Vocally people expressed concerns but the written comments from that meeting were more favorable than the

comments over the microphone. We didn't necessarily get a full view of other parts of the communities, which has led us to the survey that we're doing now to try to get people involved who aren't as vested in the Hill as exists today. Mr. Kelly replied that he was wondering where it would fit into the overall process. I imagine it will be put into our packet at some point. Mr. Bleidorn replied that the Assembly will be asked to provide direction on how to proceed after the survey

Mr. Mertl asked what is the decision-making process for this project, we've received public input and four concepts, does this come before this committee, and we get to weigh options. Does it go to planning? Is there a steering committee or is it decided by yourself or engineering? I'm just curious about what is the decision making process as a preferred concept and master plans as they get developed. Mr. Bleidorn replied that he doubts that those processes will come to the Lands Housing and Economic Development Committee, they'll likely be routed through the Public Works and Facilities or the Committee of the Whole.

H. COMMITTEE MEMBER / LIAISON COMMENTS AND QUESTIONS

PC Cole commented about the Gastineau Apartments permit, she noted that the conditional use permits that the Planning Commission approved for the Gastineau Lodges apartments has been in the paper a lot recently. Steve Soenksen was the applicant with that project. There's been a lot of questions about how the Planning Commission could approve a conditional use permit in that area for 72 units. She wanted to speak about that, because she suspects the assembly will get some questions from their constituents. One of the beautiful and difficult things about being on the Planning Commission, you spend a long time thinking about and understanding an issue, and then it gets reported in a small space or on a radio, and it and the summary doesn't necessarily capture all of the elements that we work through weighing carefully that night. She wanted to note that they made a distinction between land use. The conditional use permit speaks to land use versus a building permit which would speak to the safety and codes that a particular building in construction would have according to those concerns. We talked about the fire code requirements for a building of that size on a one way street. The applicant acknowledged the Planning Commission, as it stands now, would not pass fire code. The applicant had a plan to work with the fire chief in order to try and come up with some workarounds to get the building permit, and if he does so he'll get the building permit. If he doesn't, he may not but we really tried to separate the issue from land use and building. That's how we got to that decision, and wanted to try and help explain that as I suspect you might get questions.

Mr. Mertl commented that he has been a liaison for 6 plus years, and this is not intentional, when you ask for unanimous consent it silences the liaisons, and we don't get a chance to talk about the motion at all. This committee has 3 liaisons that I think provide valuable input, and perhaps in crafting or refining a motion. I know we don't get voting rights, I respect that, but I think it's an unintentional consequence of being efficient and going with unanimous consent and moving things forward that you then remove the liaisons from that discussion. Just a point of order, something to consider, I just wanted to bring that up. Chair Hughes-Skandijs replied that going forward she will think about how best to involve the liaisons. She knows they take time to come to these meetings, and we want you to weigh in on how it affects the other bodies that you serve on. Something to think or talk about at a future meeting, I will say, even if someone just made a motion, it's my understanding of the assembly rules and procedures that we would still not recognize a liaison, because when we go to a voting matter of the committee, it's an assembly committee, and so the people who are qualified to object or to alter would be assembly members. But perhaps more discussion before we get to an actual committee motion would be good.

J. NEXT MEETING DATE - January 29, 2024

L. ADJOURNMENT – 5:29pm



(907) 586-0715
CDD_Admin@juneau.gov
www.juneau.org/community-development
155 Heritage Way • Juneau, AK 99801

MEMORANDUM

DATE: January 29, 2024

TO: Alicia Hughes-Skandijs, Chair and Members of the Lands Housing & Economic Development Committee

FROM: Joseph Meyers, Housing & Land Use Specialist 

SUBJECT: **Mobile Home Down Payment Assistance Program Updates**

Background

The Mobile Home Down Payment Assistance Program (MHDPA) was developed in 2016 by the Affordable Housing Commission to assist Juneau residents seeking to purchase a manufactured home within a manufactured home community. On August 15, 2016, the City & Borough of Juneau and True North Federal Credit Union (TNFCU) entered a servicing contract for the MHDPA.

Manufactured home purchases within manufactured home communities are typically not financeable by traditional lenders, for several reasons including the land not being owned by the purchaser of the unit. This program offers an opportunity for individuals that are priced out of or unable to access the standard housing market to put down a reasonable down payment at a low interest rate to purchase a home and build equity.

This program secures down payment funding for manufactured home purchases. The current terms of these loans include a 50% match, up to \$10,000, with a 1% interest rate amortized over five years.

Current Loan Program Status

As of December 31, 2023, there are two active loans, with the most recent issued in 2020. As of the writing of this report, the loan account balance is \$54,066. Due to inflationary forces that have impacted the economy at a local and national level, the current match amount of \$10,000 no longer goes as far as it once did in assisting families with their down payments – because of this, the program has not seen a new loan since 2020. Staff has discussed potential options with TNFCU on ideas to increase program utilization and identified four potential changes:

1. Increase the match amount cap to at least \$20,000
2. Increase program budget authority from \$100,000 to \$200,000
3. Increase the income limit for families and create tiered income limits
4. Change the program name to *Manufactured Home Downpayment Assistance Program* to reflect the nomenclature more accurately for this housing type and reflect contemporary terminology.

Future Manufactured Home Downpayment Assistance Program Options

Program changes

The Assembly will determine how the MHDPA program proceeds. Staff has reviewed the following updates to guide the decision-making process:

- Match Increase: Increase the match cap amount to at least \$20,000. The average cost for a down payment on manufactured homes has increased since the creation of this program, and an increased loan match will expand opportunities for homeownership.

- **Additional funding:** The current balance of the program account is \$54,066 with \$5,272 outstanding in current loans for a total of \$59,338. This account contains solely loan interest and repayments from past loans. Because the new match-increase amount doubles the maximum loan amount, budget authority for the program should increase to \$200,000. This will enable the program to offer up to ten loans at the maximum loan amount, and potentially more depending on the size of the loan requested.
- **Increased Tiered Income Limits:** Under the current program guidelines the income limit for a family, regardless of size, is \$96,800 per year and has remained at this level since 2016. To keep up with inflation, the income limit could now be tied to the annual HUD area median income (AMI) at 120%, which takes account of household size. While the numbers below may seem high, it is necessary to remember that the [Median Family Income \(MFI\) for Juneau is \\$122,200](#). Below are the 2023 HUD Income Limits for Juneau at 120% AMI. This percentage of AMI was chosen to expand access to this resource for households with dual incomes that exceed the current limit of \$96,800 and that are considered low to moderate income.

Table 2: 2023 HUD Income Limits – 120% AMI						
Household Size	1 person	2 people	3 people	4 people	5 people	6 people
Maximum Income	\$102,720	\$117,360	\$132,000	\$146,640	\$158,400	\$170,160

- **Name change:** Staff recommends that the name of the program should be changed to better align the program with the broader conversation around this type of housing; both community-wide and nationwide. *Manufactured home* is the predominant term used nationwide for this type of housing unit by both public and private planning entities. Staff proposes changing the name of the Mobile Home Down Payment Assistance Program to the “Manufactured Home Downpayment Assistance Program”.

Potential future programs

First-time Homebuyers Program: During the conversation with staff and TNFCU, the idea of expanding the existing MHDPA program to offer additional loans on stick-built homes to function as a first-time homebuyer program was raised. During this conversation, it became apparent that expanding this existing program would create a larger and much more complicated program. This is largely due to the differences in how these types of structures are financed. TNFCU has suggested the need for a first-time homebuyer program and could be interested in a partnership with the CBJ to administer a stand-alone first-time homebuyer program covering a more diverse array of housing choices.

RECOMMENDATION

Staff recommends that the LHEDC provide a motion of support for the continuation of the Manufactured Home Downpayment Assistance program (formerly the Mobile Home Down Payment Assistance program) with an increase in funding from \$10,000 to \$20,000, tiered household income limits, and an increase in program budget authority from \$100,000 to \$200,000.

Staff recommends that the LHEDC request staff to bring back guidelines and terms for a first-time homebuyer program.

Attachments

- Attachment A: 2023 HUD Income Limits for Juneau document
- Attachment B: Current MHDPA Program Flyer

FY 2023 INCOME LIMITS FOR ALASKA

Effective
July 13,
2023

Community Name	INCOME LIMIT - 1 PERSON	INCOME LIMIT - 2 PERSONS	INCOME LIMIT - 3 PERSONS	INCOME LIMIT - 4 PERSONS	INCOME LIMIT - 5 PERSONS	INCOME LIMIT - 6 PERSONS	INCOME LIMIT - 7 PERSONS	INCOME LIMIT - 8 PERSONS	EA ADDED FAMILY MEMBER
Anchorage Municipality Low Income Limit	85,600	97,850	110,050	122,300	132,100	141,850	151,650	161,450	9,784
Aleutians East Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Aleutians West Census Low Income Limit	80,150	91,600	103,050	114,500	123,650	132,800	142,000	151,150	9,160
Bethel Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Bristol Bay Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Chugach Census Area <i>(Includes Valdez)</i> Low Income Limit	78,600	87,500	98,450	109,400	118,150	126,900	135,650	144,400	8,752
Copper River Census Area Low income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Denali Borough Low Income Limit	92,200	105,350	118,550	131,700	142,250	152,800	163,300	173,850	10,536
Dillingham Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Fairbanks North Star Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Haines Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Hoonah-Angoon Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Juneau Borough Low Income Limit	85,550	97,750	110,000	122,200	132,000	141,750	151,550	161,300	9,776
Kenai Peninsula Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Ketchikan Gateway Borough Low Income Limit	76,800	87,750	98,750	109,700	118,500	127,250	136,050	144,800	8,776
Kodiak Island Borough Low Income Limit	76,600	87,500	98,450	109,400	118,150	126,900	135,650	144,400	8,752
Kusilvak Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Lake and Peninsula Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Matanuska-Susitna Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Nome Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
North Slope Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Northwest Arctic Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Petersburg Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Prince of Wales-Hyder Census Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Sitka City & Borough Low Income Limit	76,000	86,900	97,750	108,600	117,300	126,000	134,650	143,350	8,688
Skagway Municipality Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Southeast Fairbanks Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Wrangell City and Borough Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Yakutat City & Borough Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
Yukon-Koyukuk Census Area Low Income Limit	74,850	85,500	96,200	106,900	115,450	124,000	132,550	141,100	8,552
2023 DOE Poverty Income Levels FINAL	36,420	49,280	62,140	75,000	87,860	100,720	113,580	126,440	12,860

The Valdez-Cordova census area has been divided into two, Chugach and Copper River.

CITY OF JUNEAU

MOBILE HOME

DOWN PAYMENT ASSISTANCE PROGRAM



The City and Borough of Juneau (CBJ) has partnered with True North Federal Credit Union (TNFCU) to create the Mobile Home Down Payment Assistance Program for Juneau residents looking to purchase a mobile home. The program will provide low interest loans to qualified residents for up to 50% of the down payment. Residents must be able to match the other 50%. Loans will be available at 1% interest and are not to exceed \$10,000. The borrower will have up to five (5) years to pay back the loan.



"Mobile homes are a significant component of Juneau's affordable housing stock," said Scott Ciambor, CBJ Chief Housing Officer. "This program will help make sure the cost of a down payment does not limit Juneau residents from purchasing a mobile home."



\$100,000 in funds from the CBJ Affordable Housing Fund is set aside to provide an additional financing option for residents with a median household income below \$96,800. The Mobile Home Down Payment Assistance Program will be available to Juneau residents until the \$100,000 is fully allocated.

True North Federal Credit Union will administer the program. Eligibility requirements include:

- Median Household Income less than \$96,800 annually;
- Resident must provide matching funds to use the CBJ down payment assistance program; and
- Program is available for mobile homes located in a mobile home park.

About True North Federal Credit Union

Chartered in 1948 True North Federal Credit Union is a non-profit full-service cooperative financial institution owned and directed by its members in Alaska. They are chartered, regulated and insured by the National Credit Union Administration, an agency of the federal government. True North Federal Credit Union serves over 10,000 members. To learn more about the credit union difference and how we make members our business visit www.TrueNorthFCU.org.



TRUE NORTH
FEDERAL CREDIT UNION

**For more information, visit us at True North located at
2777 Postal Way (next to the valley post office) or call (907) 523-4710.**



Eligibility is O.A.C (On Approved Credit). Down Payment Assistance (DPA) loan is up to 50% of your down payment requirement not to exceed \$10,000. DPA loans are capped at a maximum term of 60 months and will be charged a note rate of 1%.

Federally
Insured
by NCUA

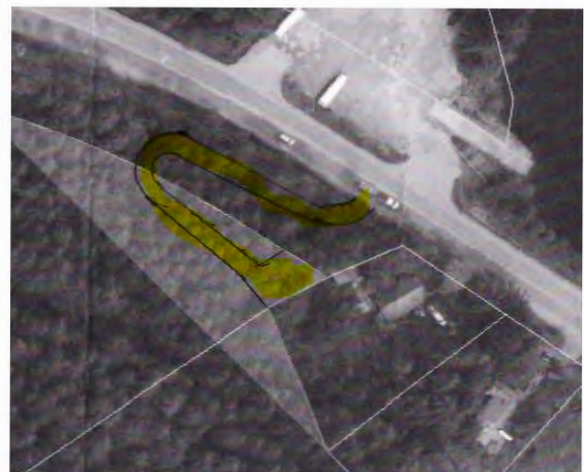
MEMORANDUM

CITY/BOROUGH OF JUNEAU

Lands and Resources Office
155 Heritage Way Juneau, Alaska 99801
Dan.Bleidorn@juneau.gov
(907) 586-5252

TO: Alicia Hughes-Skandijs, Chair of the Assembly LHED Committee
FROM: Dan Bleidorn, Lands and Resources Manager *Daniel Bleidorn*
SUBJECT: Sandberg Request to Purchase City Property
DATE: January 24, 2024

In December 2023, Barbara and David Sandberg submitted an application to purchase City property adjacent to their property located at 10965 Glacier Highway, in Auke Bay. The CBJ property is located along Glacier Highway opposite the Auke Lake parking lot. The application states that the requested property will be used to create driveway access and parking because the State DOT is no longer allowing the applicants to park in the right of way in front of their home. The property is located between the applicant property and Friz Cove Road. The applicants state that the hill behind their home is steep and needs an estimated 0.6 acres of city property to be able to turn around back toward their home to reduce the steepness to allow for safe access to the higher elevation of the property and space for building a home.



City Code 53.09.260(a) states that the Assembly must determine “whether the proposal should be further considered and, if so, whether by direct negotiation with the original proposer or by competition after an invitation for further proposals. Upon direction of the Assembly by motion, the Manager may commence negotiations for the lease, sale, exchange, or other disposal of City and Borough land.”

It is not recommended to solicit competition for this disposal because this request is being made in order to gain access to an existing house. The application includes a significant amount of CBJ owned land and road frontage, and if this request moves forward the outcome of negotiations

will likely be a recommendation from staff for a combination of land disposal and an easement in order for the city to retain CBJ ownership of the road frontage.

The 2016 Land Management Plan designates this property with a retain/dispose status. There are currently no plans for the development of this property but the location and proximity to utilities warrants further investigation. It is CBJ policy to reserve road frontage and large tracts adjacent to utilities until a development study is complete in order to develop large properties efficiently.

The applicant will be responsible for all costs associated with the minor subdivision and acquisition of this property including the fair market value of the land. Proceeds from this proposed request will be deposited into the Land Fund. If this application moves forward, the disposal will be reviewed for conformity with existing adopted plans by the Planning Department and the disposal would be authorized by the Assembly by adopting an ordinance with terms and conditions.

Staff request that the Lands, Housing and Economic Development Committee forward this application to the Assembly with a motion of support for negotiating with the original proposer towards the disposal of City property and/or easement in accordance with 53.09.260 and 53.09.300.

Attachments:

1. Application
2. City Code sections 53.09.200 and 53.09.260



Application to Purchase City and Borough of Juneau Lands

Applicant Information

Business / Individual *

Barbara Ann Sandberg; David Carl Sandberg

Address *

PO Box 211206, (10965 Glacier Highway)

Street Address

Auke Bay

City

AK

State / Province / Region

99821

ZIP / Postal Code

Phone *

(907) 209-1243 or 907-209-8060 (Barb cell)

Email



n561gs@gmail.com (Dave) or aukenessie@gmail.com (Barb)

☐ Add Another Business/Individual

CBJ Land Information

The CBJ Assessor's Database will provide information regarding site address and legal description. The CBJ Parcel Viewer tool can provide necessary maps needed to complete this application.

Site Address *

10965 Glacier Highway

Legal Description *

USS 3832 LT 1, USS3817 LT 1

Provide Brief Description of Your Proposal *

We are requesting to purchase 0.6 acres of City land adjacent to our property at 10965 Glacier Highway to build a driveway and parking. D.O.T. is no longer allowing us to park on their right of way in front of our house but has stated we can build a driveway on the wider right of way toward Fritz Cove from our house. In order to sidehill up the cliff we would need additional property to turn back toward our house. We have bartered with neighbors to park at their houses but as we are both senior citizens, carrying groceries that distance or parking across Glacier Highway to carry groceries gets increasingly difficult.

Provide a Map of CBJ Land you wish to Purchase *

No file selected.

Accepted file types: pdf, Max. file size: 50 MB.

Have you mailed the \$500.00 filing fee? *

☒ Yes

☐ Not Yet

Applications can only be processed when the \$500 fee is received. All checks are made out to "The City and Borough of Juneau" and can be sent to:

*The City and Borough of Juneau
Attn: Lands and Resources Division
155 S. Seward St.
Juneau, AK 99081*

Additional Comments for CBJ Staff to Consider

Upload Supporting Documents (optional)

Drop files here or

SELECT FILES

Accepted file types: pdf, doc, docx, Max. file size: 50 MB.

"By submitting this form, I agree all information is accurate. Submission of this request is NOT approval by the City and Borough of Juneau. I understand that staff will review my application and follow up with questions. Once staff have reviewed my application, ultimate determination of my request to purchase City property will be made by the City Assembly."

Legal Representative of Business / Individual *

First

Last

CAPTCHA

reCAPTCHA

Could not connect to the reCAPTCHA service.

Please check your internet connection and reload to get a reCAPTCHA challenge.

Privacy - Terms

SUBMIT

Disable Parcel Detail Hide Control Panel

Map Layers

Tools



Area: 0.59 Acres
Perimeter: 343.83 yards

Instructions:

Click to add vertices, double-click to complete and close the polygon.

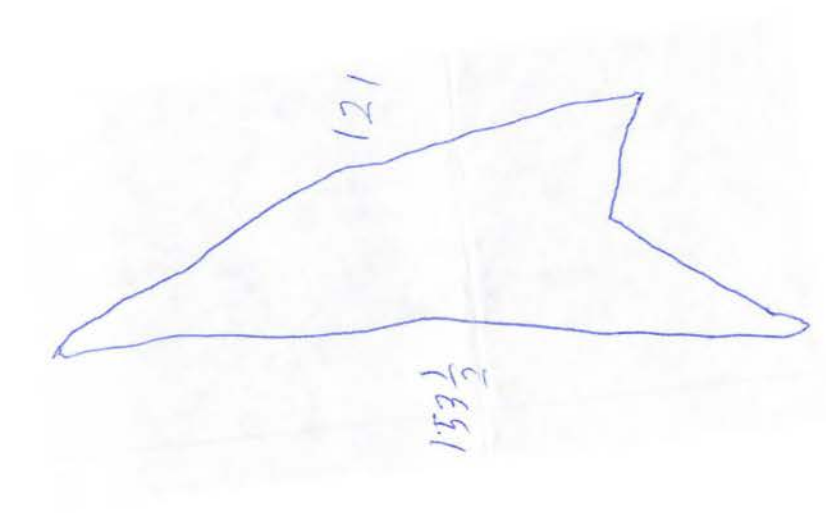
Please note: You might want to disable the Parcel Detail function while measuring, to avoid seeing parcel detail results while you are clicking on the map.

Juneau.org/Lands

Search

Output





53.0.200 - General.

(a)*Methods of disposal.* City and Borough land may be conveyed by lottery, auction, over-the-counter sale, negotiated sale, sealed bid, land exchange, or other methods as the assembly may approve by ordinance.

(b)*Inclusion in Land Management Plan.* Except for property acquired by tax foreclosure or reconveyance agreement, real property should not be conveyed prior to inclusion in a land management plan.

(c)*Satisfaction of CBJ 53.09.260.* Real property recommended for negotiated sale in management plan adopted by the Assembly not more than two years prior to commencement of negotiations for a negotiated sale shall be deemed to have satisfied CBJ_53.09.260(a) Sales, leases, and exchanges by negotiation or competitive proposal.

(d)*Ordinance.* Terms and conditions for each land sale shall be approved by the assembly by ordinance.

(e)*Sale price.* Except as provided in CBJ_53.09.270, Disposals for public use, the sale price for City and Borough land shall not be less than market value as determined by the manager.

(f)*Sales brochure.* The manager shall prepare, and make available to the public, a sales brochure detailing the terms and conditions of sale for competitive land sales.

(g)*Qualification.* To qualify for a land sale, the applicant must be an individual 18 years of age or older at the time of registering for the sale or a business, licensed to conduct business in the State of Alaska. No person or business entity may apply for, or purchase, a parcel offered for sale if he or she has defaulted on a prior purchase of City and Borough property within the five years preceding the proposed sale. To qualify for a parcel, the registrant or authorized agent must be present at the lottery, auction, bid opening, or over-the-counter sale.

(h)*Agent.* An agent participating for another person or entity shall identify himself or herself as an agent, submit a written agency agreement, power of attorney, or other document showing the agent's authority, and shall identify the agent's principal. This information shall be available to the other participants.

(i)*Disqualification.* The manager may disqualify from participating in a land sale conducted under CBJ_53.09.210-53.09.250 lottery, auction, over-the-counter and sealed bid sales, any person who willfully violates the provisions governing bidder, applicant, or purchaser qualifications.

(j)*Public notice and marketing.* Not less than 45 days before the date of a land lottery, auction, sealed bid opening, or the commencement date of an over-the-counter sale, the manager shall place an advertisement providing notice and a description of the sale in a newspaper of general circulation in the municipality, which shall run one day per week for at least four consecutive weeks. The manager may use whatever additional advertising media, format, or frequency he or she determines will best inform the public of the sale and most advantageously market the property.

(k)*Deposit.* Prior to the close of business on the day of the lottery, auction, or bid opening, the buyer or the buyer's agent shall provide the City and Borough a non-refundable down payment equal to five percent of the purchase price, submit any proof of buyer's qualification, and execute

the purchase agreement and other required documentation as stated in the sales brochure. The deposit shall be in cash or by check or similar instrument. If the buyer fails to prove the buyer's qualifications or to tender the required down payment or to execute the necessary purchase agreement or other instruments to close the sale, or if the check does not clear, the sale is void, and all rights of the buyer in the property arising out of the sale are terminated. Unless specifically provided otherwise by the manager in writing, the buyer shall have no right of possession to the property until all necessary notes, security and other instruments necessary to close the sale have been executed and the sale closed.

(l)*Payment of balance.* The balance shall be paid over a period not to exceed ten years in equal annual, quarterly, or monthly payments of principal and interest with interest on the unpaid balance at a rate established by the assembly by ordinance. The manager may direct loan payments to a bank of his or her choice and establish service fees, the payment of which shall be the purchaser's responsibility. There shall be no prepayment penalty.

(m)*Subordination.* The manager shall not subordinate the security interest of the City and Borough to that of another lender.

(n)*Application form and registration fee.* The application shall be on a form provided by the City and Borough. A nonrefundable registration fee must accompany the application.

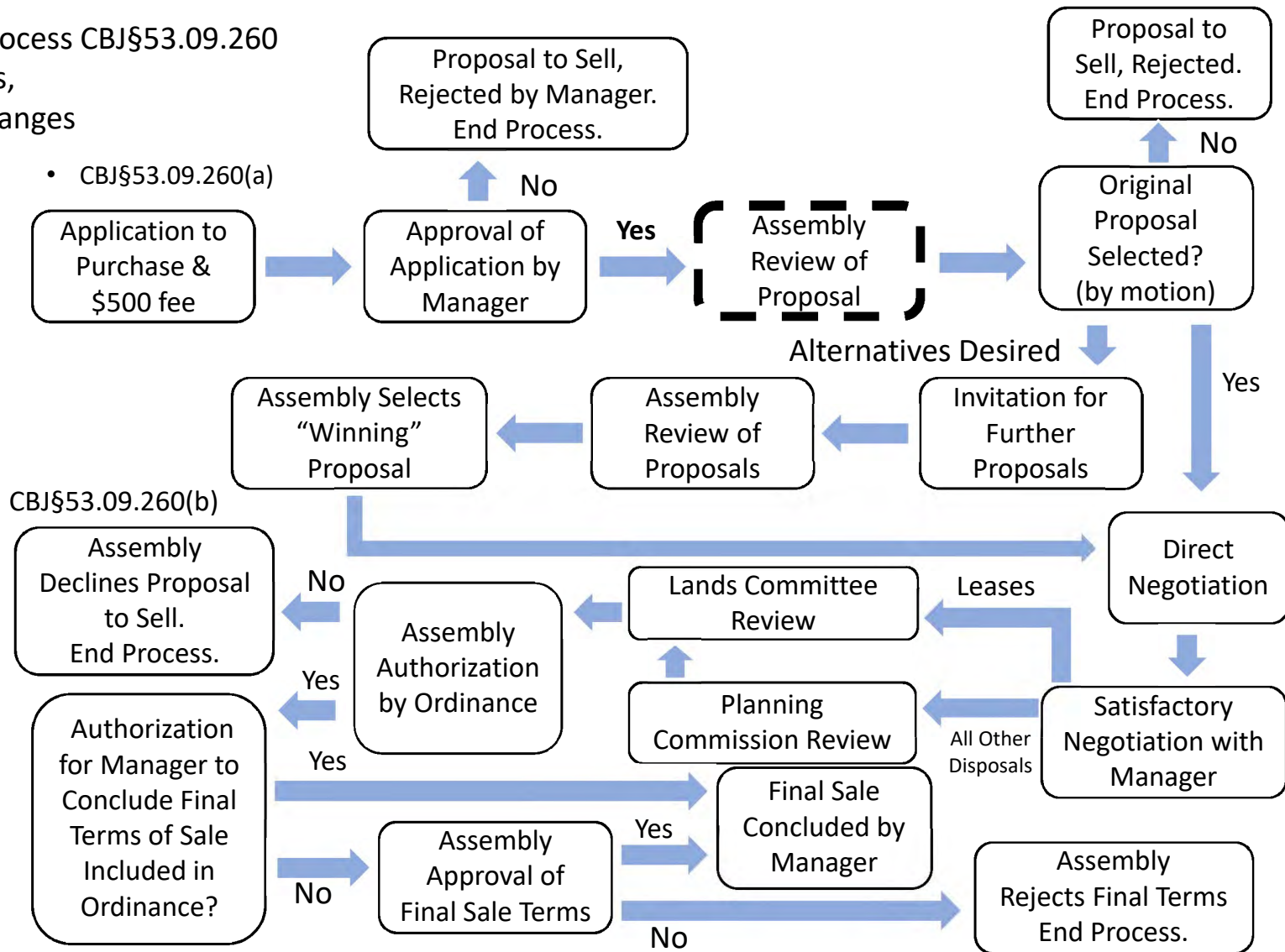
(o)*Tax foreclosed land.* Applicable provisions of state law shall govern the disposal of land acquired by tax foreclosure to the extent state law and this chapter are in conflict on such disposals.

53.09.260 - Negotiated sales, leases, and exchanges.

(a)*Application, initial review, assembly authority to negotiate.* Upon application, approval by the manager, and payment of a \$500.00 fee, a person or business entity may submit a written proposal to lease, purchase, exchange, or otherwise acquire City and Borough land for a specified purpose. The proposal shall be reviewed by the assembly for a determination of whether the proposal should be further considered and, if so, whether by direct negotiation with the original proposer or by competition after an invitation for further proposals. Upon direction of the assembly by motion, the manager may commence negotiations for the lease, sale, exchange, or other disposal of City and Borough land.

(b)*Review and approval process.* Upon satisfactory progress in the negotiation or competition undertaken pursuant to subsection (a) of this section, after review by the planning commission for disposals other than leases, after review by the assembly lands committee, and authorization by the assembly by ordinance, the manager may conclude arrangements for the lease, sale, exchange, or other disposal of City and Borough land. The final terms of a disposal pursuant to this section are subject to approval by the assembly unless the minimum essential terms and the authority of the manager to execute the disposal are set forth in the ordinance enacted pursuant to this subsection. The disposal may not be executed until the effective date of the ordinance.

CBJ Land Sale Process CBJ§53.09.260 Negotiated Sales, Leases and Exchanges



**MEMORANDUM****Date: January 24, 2024****To: Borough Assembly, Committee of the Whole****From: Alexandra Pierce, Tourism Manager****Re: Tourism Progress Report**

At the Assembly Retreat, the body discussed options for limiting cruise ships, as well as the broader scope of CBJ's tourism management efforts. This memo provides a status update on the various components of our tourism management strategy.

Daily Cruise Passenger Limits

Staff is working with the industry on additional negotiated agreements to further limit the number of visitors. This will likely take the form of daily limits, ship size limits, or a combination of the two. It will also include a provision eliminating hot berthing as a scheduled practice. There are significant challenges with negotiating and implementing a ship free day, and such an effort would take extensive regional coordination (which port would receive our ships on that day? If another port decided to do a ship free day, would we be willing to add a ship to our schedule?). These negotiated efforts are an ongoing discussion with many iterations. As we work strategically with our regional partners, we can begin to consider negotiated efforts that affect multiple ports. For now, what happens in Juneau affects the entire region, and our port partners are closely monitoring our actions. This next agreement will focus on manageable numbers for our own community, with the goal of providing the space and time necessary to work on improving our infrastructure and pursuing multiple visitor management strategies.

Private Docks

Traditionally, CBJ dockage fees have been significantly lower than those at private docks. Staff continues to work with the private dock owners on an agreement to raise CBJ dockage fees to be competitive with private facilities, to prohibit hot berthing, to strategically schedule ships to maximize use of shore power (once installed), and to enter into a rational agreement on how marine passenger fees are allocated to public and private docks.

Shore Excursions

There has been much discussion around Juneau's shore excursion capacity and the need for more opportunities. The below chart was included in your memo at the retreat, it shows the capacity of our various excursions today vs. in the future and provides context for the discussion and status updates below.

Shore Excursion	Regulator	Current Capacity (all numbers approximate)	Future Capacity	Completion Date	Notes
Eaglecrest Gondola	Eaglecrest/Goldbelt	0	500/day	2026	
MGRA Improvements	USFS	530K/season 3500/day	870K/season 5700/day (4230/day after phase 1 complete)	Phase 1 - 2026	Three phases planned, only phase 1 funded. MGRA-based activities (rafting, hiking) are included.
CBJ park and trail-based tours	CBJ	1401	1401/day	n/a	Capacity may change with CRUS, assumes USFS permitted tours included in MGRA total
Helicopter tours	USFS	570	685/day	n/a	Limited by USFS EIS
Whale Watch	N/A	2898/day in 2019	3000/day	n/a	Increase based on more boats for 2024
Mt. Roberts Tram	N/A	7000/day	7000/day	n/a	
Total Daily Capacity		15369	16636		

Mendenhall Glacier:

The USFS issued its Record of Decision for the Mendenhall Glacier Visitor Facility Improvements. The Record of Decision approves expanded parking and staging areas, improved infrastructure, extensive trail construction and various other improvements designed to better welcome and receive visitors at the Mendenhall Glacier Recreation Area (MGRA).

This will translate to an increase in the number of commercial operator permits available. There are currently around 530,000 permits allocated, this will increase to 869,130. The permit numbers will be increased over time, tied to new infrastructure constructed. We have been told by the USFS that funding is secured for the parking lot expansion and welcome center, anticipated to be open for the 2026 season, permit increases will be allocated as follows:

- When main parking lots located closest to the lakeshore are constructed, 30% of the additional service days can be allocated for transportation.
- When additional restrooms are added in the Lakeshore Plaza area, an additional 30% of the additional service days can be allocated for transportation.
- When the Welcome Center is complete, and 3 years of monitoring have been completed (after

service day increases associated with main parking lots or additional restrooms), the full amount of service days can be allocated.

Staff is working with the USFS and local tour operators to address the issues with tour operators, glacier capacity, and Capital Transit. This is a more complex and thorny issue than simply restricting transit use to residents, moving a bus stop, or tour operators dropping off outside the MGRA boundaries. For the 2024 season, Capital Transit will add capacity, and local tour operators are adjusting their offerings to help manage daily volume. The parties involved are collaborating on a communications strategy to explain to visitors that there is limited tour capacity available and that visitors are encouraged to book tours in advance.

Whale Watching

The Whale Watching association continues to meet and will put forward recommendations on new TBMP guidelines for next year. The Assembly will receive another update from the group in the coming months.

Commercial Recreation Use Strategy

CBJ has selected Corvus Design as our commercial recreation use study contractor. Corvus will be kicking off public engagement soon. Staff have requested opportunities for engagement with individual neighborhoods in addition to a community-wide public process.

Other Efforts

Port Communities of Alaska

The Port Communities of Alaska is working to organize under Alaska Municipal League, allowing the group to hold common contracts and take positions on issues as a single entity. The group will also receive administrative and meeting support from AML. Communities throughout Alaska are currently considering their future as tourism destinations and this coordination will be important and we build toward a collective regional strategy.

Green Corridor

The Green Corridor project continues to progress. The First Movers group is working with the Maersk McKinney Moeller Center to conduct feasibility studies on the future use of green methanol or bio-oil for cruise ship propulsion. The discussion is currently between the cruise lines and home ports on supply chains, fueling infrastructure, and technical considerations. CBJ continues to be engaged to represent Alaska port interests. Depending on the type of fuel selected, Juneau may be a secondary bunkering and fueling location for either green methanol or bio-oil. We do not yet know the costs and implications of bunkering alternative fuel in Juneau, but staff will provide updates as planning continues.

Franklin to AJ Seawalk

CBJ and Petro Marine have agreed on a preferred seawalk alignment between the Franklin and AJ Docks. The next steps will be to work with the private dock owners to secure the necessary easements and to collaborate with Petro Marine on a project plan and cost estimates. Petro will be replacing its dock facilities as part of the project and both parties are committed to coordinating permitting and construction efforts to maximize efficiency.

Revolving Loan Program

Finally, you will see a Marine Passenger Fee allocation for a revolving loan program in this year's budget. This is a new initiative to help accelerate conversions to cleaner energy infrastructure and equipment in the shore excursion industry. In the early 2000's CBJ provided funds for a program that established low-interest loans for floatplane operators to convert to turbine otter engines, which significantly reduced flightseeing noise. The loans were administered by JEDC. This program would use the template created by this previously successful effort and refocus the loans to fund cleaner energy conversions. This could be anything from a hybrid boat engine to a cleaner running or alternative fuel bus. The goal is to stimulate investment in cleaner technologies for local operators by helping reduce financial barriers. The plan is to seed the program with an initial passenger fee allocation for FY25 and to develop and work to grow the program over the coming years.



JUNEAU TOURISM SURVEY

2023

December 2023

PREPARED FOR:

City and Borough of Juneau



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Executive Summary

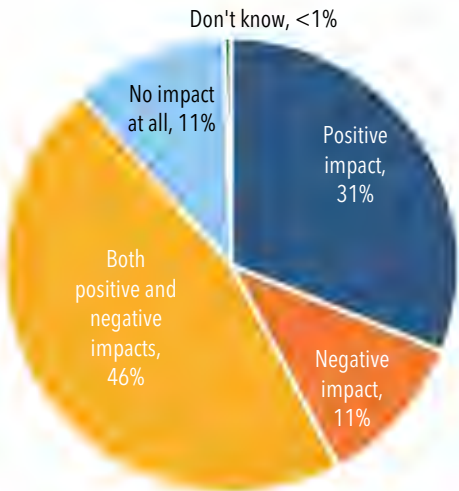
The City and Borough of Juneau contracted with McKinley Research Group to conduct a telephone survey of 517 randomly selected Juneau residents regarding tourism. The survey was conducted in fall 2023; similar surveys were conducted in 1995, 1998, 2002, 2006, 2021, and 2022. To qualify for the survey, respondents were required to be current residents and to have lived in Juneau in the summer of 2023. Survey results were weighted by age and neighborhood to reflect population characteristics. Following are key survey results.

Overall Impacts: Positive vs. Negative

When asked about the overall impact of tourism on their household, three out of ten respondents (31%) said that tourism had an overall *positive impact*, while 11% said it had a *negative impact*. The most common response was *both positive and negative impacts* at 46%, while 11% said they felt no impact at all.

Those that said *both positive and negative impacts* were asked whether the positive outweighed the negative or vice versa; these respondents were more likely to say *positive impacts outweigh the negative* (49%) than *negative impacts outweigh the positive* (32%); another 12% said *neither/neutral*.

Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?

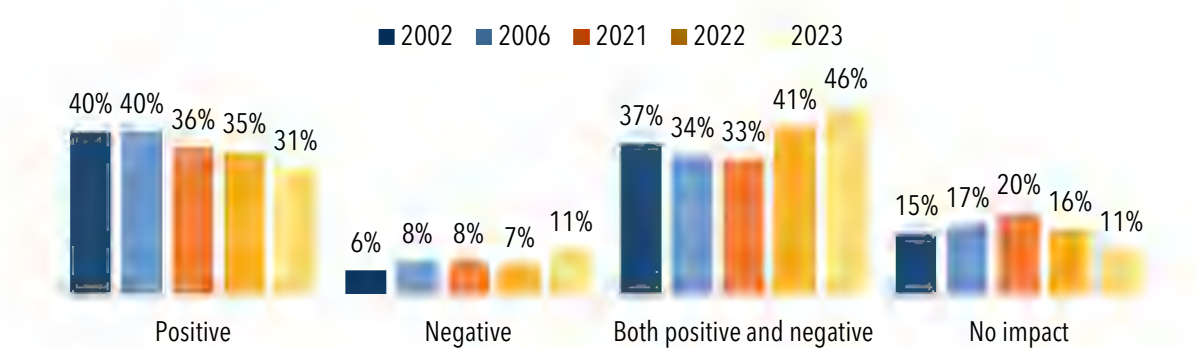


Among those who responded "Both:" Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



The question about the overall impact of tourism has been asked over the last five editions of the survey. Those reporting overall positive impacts decreased over time from 40% in 2002 and 2006 to 31% in 2023, while those reporting negative impacts increased from 6% to 11%. The percentage reporting both positive and negative impacts shows the largest difference, all in the last three years: from 33% in 2021, to 41% in 2022, to 46% in 2023. Those reporting no impacts fell over the same time period: from 20% to 16% to 11%.

Comparison: Overall Impact of Tourism on Households, 2002, 2006, 2021, 2022, 2023

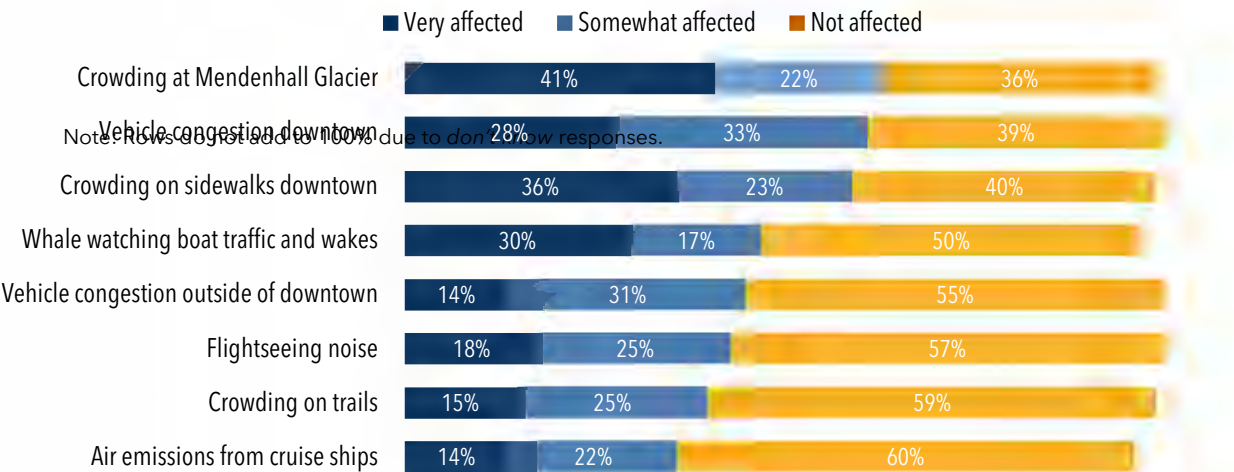


Notes: The 2021 survey referred to 2019 impacts. Excludes "don't know" and refused responses.

Specific Impacts

Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2023. Respondents were most likely to be affected by *crowding at Mendenhall Glacier* (63% somewhat or very affected), *vehicle congestion downtown* (61%), and *crowding on sidewalks downtown* (59%).

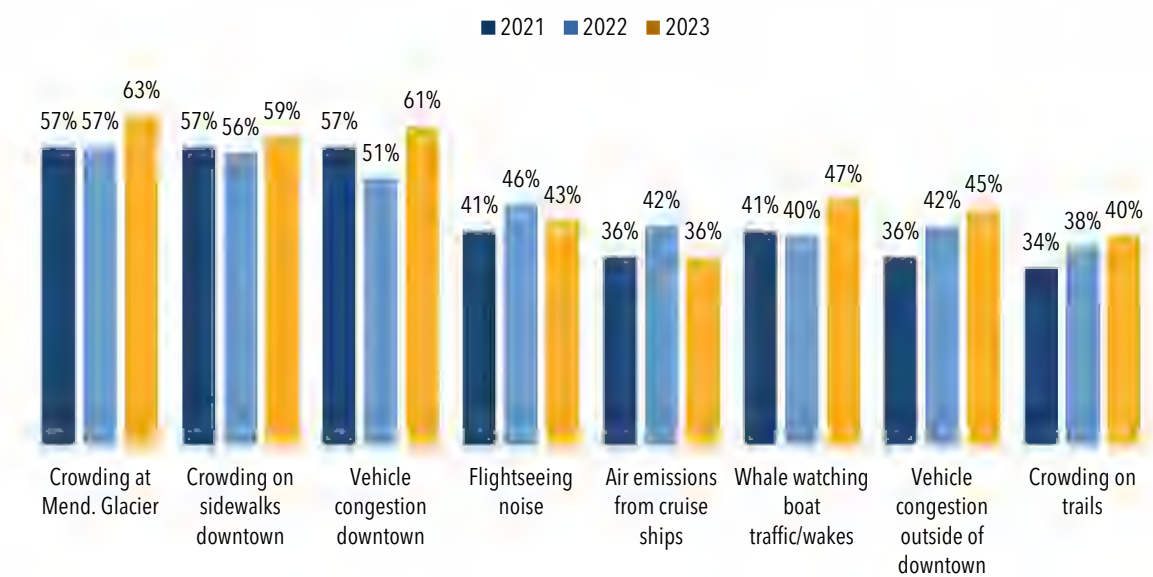
For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023?



Note: Rows do not add to 100% due to don't know responses.

The rates of those somewhat or very affected by tourism-related impacts was highest for six out of eight categories in 2023 compared to the previous two years. Those somewhat/very affected by *crowding at Mendenhall Glacier* increased from 57% in 2022 to 63% in 2023. Those somewhat/very affected by *vehicle congestion downtown* increased from 51% in 2022 to 61% in 2023. Those somewhat/very affected by *whale watching boat traffic and wakes* increased from 40% in 2022 to 47% in 2023. Those somewhat/very affected by *vehicle congestion outside of downtown* increased from 36% in 2021 to 42% in 2022 to 45% in 2023.

Percentage of Households Somewhat/Very Affected, 2021, 2022, 2023



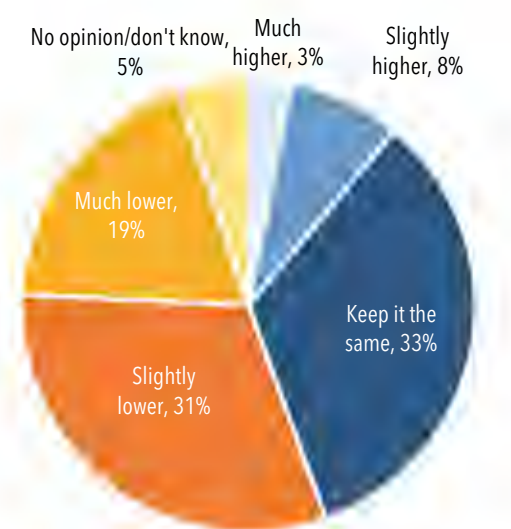
Cruise Passenger Volume

Respondents were read the following before the next question:

Earlier this year CBJ and the cruise industry agreed to a limit of five large ships per day. As a result, cruise passenger volume is projected to flatten over the next two years.

They were then asked their preference for future cruise passenger volume. One-half (50%) would prefer volume to be lower, including 19% who would prefer it much lower. One-third (33%) would prefer keeping it the same, while 11% would prefer it higher, including 3% who would prefer it much higher.

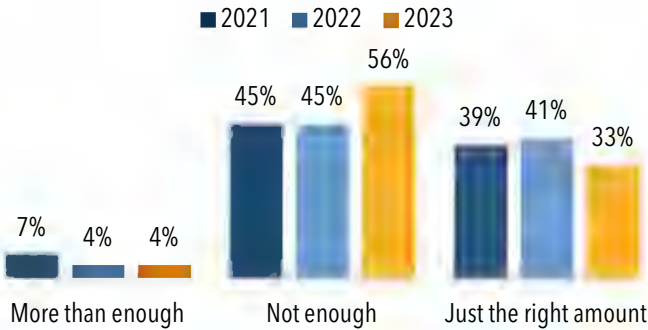
What is your preference for future cruise passenger volume in Juneau?



Tourism Management

When asked to rate how CBJ is managing the impacts of the visitor industry, the most common response is that CBJ is *not doing enough* (56%), followed by *just the right amount* (33%). The percentage saying CBJ is *not doing enough* increased from 45% in 2022 to 56% in 2023, while those saying CBJ is doing *just the right amount* decreased from 41% to 33%.

Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?

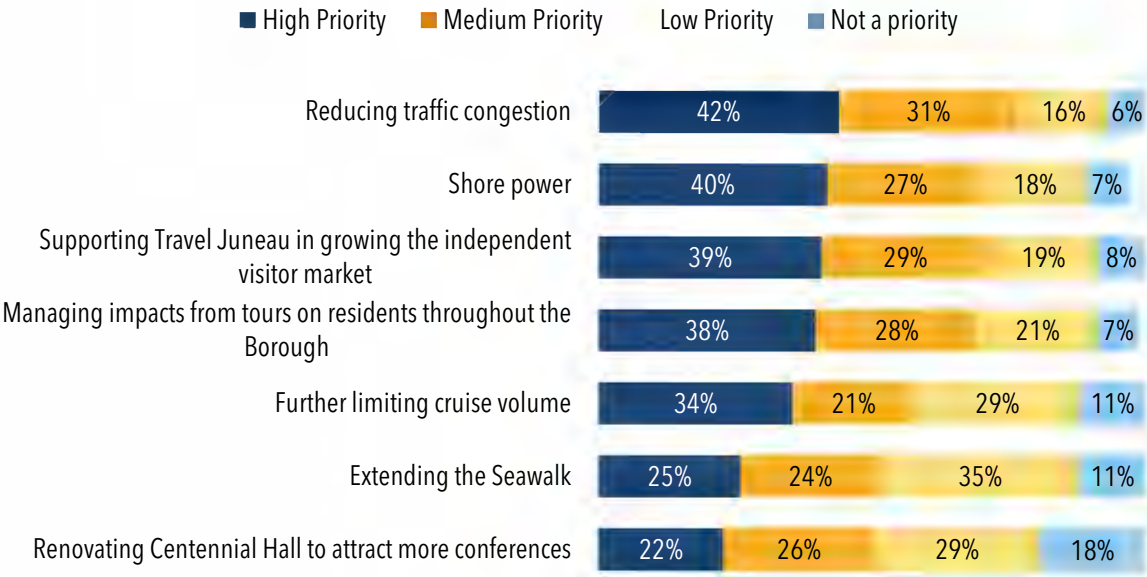


Note: Excludes "don't know" responses.

CBJ Tourism Priorities

Residents were asked what level priority should be placed on seven different CBJ tourism activities. The highest priority was *reducing traffic congestion*, with 42% saying this should be high priority, followed by *shore power* at 40%, *supporting Travel Juneau in growing the independent visitor market* at 39%, and *managing impacts from tours on residents throughout the borough* at 38%.

Should CBJ place a high priority, medium priority, or low priority on each of the following items?



Note: Rows do not add to 100% due to don't know responses.

Introduction and Methodology

Introduction

The City and Borough of Juneau (CBJ) contracted with McKinley Research Group (MRG; formerly McDowell Group) to conduct a public opinion survey of Juneau residents regarding tourism. Results help inform CBJ's tourism management and planning efforts. This is the third consecutive tourism survey of Juneau residents, following similar surveys in 2021 and 2022; previous surveys were also conducted in 1995, 1998, 2002, and 2006.

Methodology

The survey was designed by MRG staff in cooperation with CBJ staff. Many questions from the previous surveys were repeated in order to gauge trends. To qualify for the survey, respondents confirmed they were current residents and lived in Juneau in summer 2023.

The survey sample was randomly drawn from an appropriate mix of cell and landline numbers purchased from Dynata, a national supplier of survey samples. Surveys were completed with 517 randomly selected Juneau residents. The survey was conducted between October 24 and November 7, 2023.

The maximum margin of error at the 95% confidence level is $\pm 4.3\%$ for the full sample; this margin of error increases for subsamples.

The survey sample was compared to Juneau's adult population by gender, age, and area of residence. There was some disparity between the survey sample and the population in terms of area of residence. For example, residents who live in Salmon Creek, Lemon Creek, or Switzer Creek represent 16% of the population, compared to 10% of the survey sample; and Downtown/Thane residents represent 11% of the population, compared to 15% of the survey sample. Survey data was therefore weighted by neighborhood in order to maximize representativeness.

As with most random telephone surveys, residents in the oldest age groups were more likely to participate than residents in the youngest age groups; survey data was further weighted by age.

See table, next page

Table 1. Telephone Survey Sample versus Juneau Population

	Survey Sample (%)	Juneau Population (%)
Gender		
Male	50	51
Female	44	49
Unknown	6	-
Area of Residence		
Mendenhall Valley	43	46
Salmon Creek/Lemon Creek/Switzer Creek	10	16
Douglas/West Juneau	15	12
Downtown/Thane	15	11
Brotherhood Bridge/Out the Road	12	10
North Douglas	5	5
Other	1	-
Age		
18-24	7	10
25-34	16	20
35-44	17	17
45-54	17	17
55-64	20	18
65-74	15	12
75+	8	5

Sources: U.S. Census for age and gender; CBJ for neighborhood.

Survey data was also tested for differences by neighborhood of residence, neighborhood of employment, age group, gender, and whether a household member was employed in the tourism industry. Statistically significant differences between subgroups are addressed in the text accompanying each table.

COMPARISON WITH PAST SURVEYS

This report presents comparisons with results from similar surveys conducted in 1995, 1998, 2002, 2006, 2021, and 2022. Changes in question wording, where applicable, are noted.

The following cruise passenger volumes provide context for the trend analysis. Juneau's cruise passenger volume more than tripled between 1995 and 2023 (+334%). The latest season saw a 41% increase. Note that the 2021 survey referred to the 2019 season (the 2020 and 2021 seasons were heavily impacted by the COVID-19 pandemic).

Table 2. Juneau Cruise Passenger Volumes in Survey Years

	Cruise Passenger Volume	% Change
1995	380,600	-
1998	568,500	+49%
2002	741,500	+30%
2006	951,400	+28%
2019*	1,305,700	+37%
2022	1,167,000	-11%
2023	1,650,000	+41%
Change 1995-2023		+334%

*The 2021 survey referred to 2019 cruise volume.

Visitor Industry Impacts

Overall Impact of Visitor Industry

Respondents were asked to characterize overall visitor industry impacts on their household as positive, negative, both positive and negative, or no impact. Nearly half of respondents (46%) said they experienced both negative and positive impacts. Nearly one-third (31%) said the overall impacts were positive, while 11% said the overall impacts were negative. Another 11% said they experienced no impact at all.

This question yielded only two statistically significant differences by subgroup.

- The only difference by area of residence was a higher likelihood among Valley and Creeks residents to report no impacts at all at 15% and 12%, respectively. This compares with between 6% and 8% among other residents.
- Younger residents (18-34 years) were less likely to report negative impacts at 7%; this compares with 12% of middle-aged residents (35-54 years) and 14% of those 55 and older.

Table 3. Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?

n=515	% of Total
Positive impact	31
Negative impact	11
Both negative and positive impacts	46
No impact at all	11
Don't know	<1

Comparing to Past Surveys

The wording of this question has changed slightly over the years, although there were no changes between 2022 and 2023. In 2021 the question was *Thinking back to 2019, the last regular visitor season before COVID, do you feel the visitor industry had an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?* In prior years, the question was *Considering the costs and benefits of tourism, do you feel that the current level of tourism in Juneau has a positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?*

Those reporting positive impacts went from 35% in 2022 to 31% in 2023, while those reporting negative impacts increased from 7% to 11%. Neither of these changes were statistically significant. The shift in those reporting both positive and negative impacts over the three last years, from 33% to 41% to 46%, was significant, as was the drop in those reporting no impacts, from 20% to 16% to 11%.

Table 4. TREND: Positive Versus Negative Impacts, 1998, 2002, 2006, 2021, 2022, 2023 (%)

	1998	2002	2006	2021	2022	2023	Change 2022 23
Positive impact	29	40	40	36	35	31	-4
Negative impact	10	6	8	8	7	11	+4
Both negative and positive impacts	43	37	34	33	41	46	+5
No impact at all	16	15	17	20	16	11	-5
Don't know	1	1	1	2	1	<1	<1

Follow-up for “Both Positive and Negative” Impacts

Respondents who had cited both negative and positive impacts were asked a follow-up question, whether the positive impacts outweighed the negative or vice versa. The most common response was “the positive outweighs the negative” at 38%; 25% said the reverse; and 30% said neither/neutral.

Table 5. Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?

Base: “Both positive and negative impacts”

n=240	% of Base
Positive impacts outweigh negative	38
Negative impacts outweigh positive	25
Neutral/neither	30
Don't know	4
Refused	3

Comparing to Past Surveys

Respondents saying the positive outweighs the negative dropped from 49% in 2022 to 38% in 2023, while those saying the negative outweighs the positive also dropped, from 32% to 25%, although the latter shift was not statistically significant. The biggest change was in those saying neutral or neither: from 12% in 2022 to 30% in 2023.

Table 6. TREND: Weighing Both Positive and Negative Impacts, 1998, 2002, 2006, 2021, 2022, 2023 (%)

	1998	2002	2006	2021	2022	2023	Change 2022 23
Positive impacts outweigh negative (1998-2006: benefits outweigh costs)	45	46	47	51	49	38	-11
Negative impacts outweigh positive (1998-2006: costs outweigh benefits)	32	29	32	30	32	25	-7
Neutral/neither	16	16	14	14	12	30	+18
Don't know	6	8	7	4	5	4	-1

Composite Results

When combining results of the previous two questions, nearly half of respondents (48%) felt that either tourism has an overall positive impact on their household, or the positive impacts outweigh the negative. Nearly one-quarter (22%) felt that either tourism has an overall negative impact on their household, or the negative impacts outweigh the positive.

- Respondents reporting a household member employed in the tourism industry in the last five years were more likely to report (composite) positive impacts at 62%; this compares to 45% of other respondents.

Table 7. Combined Results: Overall Impacts + Both Positive/Negative Impacts

N 514	% of Total
Positive TOTAL	48
Positive impact	31
Both; positive impacts outweigh negative	17
Negative TOTAL	22
Negative impact	11
Both; negative impacts outweigh positive	11
No impact at all	11
Neutral/neither	14
Don't know	4

Comparing to Past Surveys

The only statistically significant differences in composite results over the last three years were the decrease in “no impact at all” (from 20% in 2021 to 16% in 2022 to 11% in 2023) and the increase in “neutral/neither” (from 5% in 2021 and 2022 to 14% in 2023).

Table 8. Combined Results: Overall Impacts + Both Positive/Negative Impacts

	2021	2022	2023	Change 2022 23
Positive TOTAL	53	55	48	-7
Positive impact	36	35	31	-4
Both; positive impacts outweigh negative	17	20	17	-3
Negative TOTAL	18	20	22	+2
Negative impact	8	7	11	+4
Both; negative impacts outweigh positive	10	13	11	-2
No impact at all	20	16	11	-5
Neutral/neither	5	5	14	+11
Don't know	4	4	4	-

Types of Impacts

Types of Impacts Affecting Households

Respondents were read eight different types of visitor-related impacts and asked to characterize how much each impact affected their household. Respondents reported the highest degree of impact with *crowding at Mendenhall Glacier*, with 41% very affected and 22% somewhat affected, for a total of 63% affected. The next most impactful was vehicle congestion downtown, with 28% very affected and 33% somewhat affected, for a total of 61% affected. Least impactful was *air emissions from cruise ships*: 14% reported being very affected and 22% somewhat affected, for a total of 36% affected.

Differences by neighborhood of residence and employment are shown in the following pages. There only a few other statistically significant differences by subgroup.

- Younger respondents were less likely to be somewhat/very affected by *vehicle congestion outside of downtown*: 9% versus 18% of middle-aged respondents and 14% of older respondents. They were also less likely to be somewhat/very affected by *flightseeing noise*: 36% versus 43% of middle-aged respondents and 49% of older respondents.
- Those reporting tourism employment among household members were more likely to be somewhat or very affected by *crowding at Mendenhall Glacier* (73% versus 60% of other respondents).

Table 9. For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023? By "affected" we mean changing your use of an area in addition to other kinds of impacts. (%)

n=511 to 517	Very affected	Somewhat affected	Very + Somewhat Affected	Not affected	Don't know
Crowding at Mendenhall Glacier	41	22	63	36	1
Vehicle congestion downtown	28	33	61	39	<1
Crowding on sidewalks downtown	36	23	59	40	1
Whale watching boat traffic and wakes	30	17	47	50	3
Vehicle congestion outside of downtown	14	31	45	55	<1
Flightseeing noise	18	25	43	57	1
Crowding on trails	15	25	40	59	1
Air emissions from cruise ships	14	22	36	60	4

Differences by Neighborhood

A few impacts showed differences in responses according to the respondents' neighborhood.

- Residents of Downtown/Thane and North Douglas were the most likely to be somewhat/very affected by *vehicle congestion downtown* at 75% for both neighborhoods, followed by Out the Road (67%), Douglas/West Juneau (65%), Valley (56%), and Creeks (53%).
- North Douglas residents were the most likely to be somewhat/very affected by *crowding on sidewalks downtown* (83%) followed by Downtown/Thane (68%), Douglas/West Juneau (65%), Out the Road (62%), Creeks (60%), and Valley (52%).
- North Douglas and Out the Road residents were the most likely to be somewhat/very affected by *whale watching boat traffic and wakes* at 66% and 63%, respectively; this compares with 48% of Douglas/West Juneau, 47% of Valley, 43% of Downtown/Thane, and 35% of Creeks.
- Valley residents were least likely to be somewhat/very affected by *flightseeing noise* at 36%; this compares with between 47% and 51% in other areas.
- Downtown/Thane and Douglas/West Juneau residents were the most likely to be somewhat/very affected by *air emissions from cruise ships* at 52% and 47%, respectively. This compares with 41% of North Douglas, 39% of Out the Road, 32% of Valley, and 26% of Creeks residents.

Table 10. IMPACTS BY NEIGHBORHOOD OF RESIDENCE:
"Very affected" plus "Somewhat affected" (%)

	Downtown/ Thane n=75	Douglas/ West Juneau n=76	Creeks n=55	Mend. Valley n=224	North Douglas n=26	Out the Road n=61
Crowding at Mendenhall Glacier	56	66	69	60	67	66
Crowding on sidewalks downtown	68	65	60	52	83	62
Vehicle congestion downtown	75	65	53	56	75	67
Flightseeing noise	47	47	50	36	49	51
Air emissions from cruise ships	52	47	26	32	41	39
Vehicle congestion outside of downtown	42	47	41	42	53	54
Whale watching boat traffic and wakes	43	48	35	47	66	63
Crowding on trails	40	45	38	38	49	37

A few impacts showed differences in responses according to where the respondent worked. Note that the sample sizes of those working in Douglas/West Juneau, North Douglas, and Out the Road were too small for analysis.

- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *vehicle congestion downtown* at 70%; this compares with 61% of those working in the Valley and 47% of those working in the Creeks area.
- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *crowding on sidewalks downtown* at 66% versus 59% of those working in the Valley and 45% of those working in the Creeks area.
- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *air emissions from cruise ships* at 49% versus 36% of those working in the Valley and 24% of those working in the Creeks area.

**Table 11. IMPACTS BY NEIGHBORHOOD OF EMPLOYMENT:
"Very affected" plus "Somewhat affected" (%)**

	Downtown/ Thane n=121	Creeks n=40	Mend. Valley n=94
Crowding at Mendenhall Glacier	65	61	63
Crowding on sidewalks downtown	66	45	59
Vehicle congestion downtown	70	47	61
Flightseeing noise	47	31	36
Air emissions from cruise ships	49	24	36
Vehicle congestion outside of downtown	43	42	49
Whale watching boat traffic and wakes	39	46	52
Crowding on trails	42	41	38

Comparing to Past Surveys

The wording of this question was adjusted slightly between 2022 and 2023. The following phrase was added after the question: *By "affected" we mean changing your use of an area in addition to other kinds of impacts.* This phrase was added because in 2021 and 2022, respondents sometimes expressed confusion on whether avoiding an area due to visitors would be considered "affected."

The most recent survey showed the highest rates of somewhat/very affected in six out of eight categories compared to 2021 and 2022. There were several statistically significant changes.

- Those somewhat/very affected by *vehicle congestion downtown* increased from 51% in 2022 to 61% in 2023.
- Those somewhat/very affected by *crowding at Mendenhall Glacier* increased from 57% in 2022 to 63% in 2023.
- Those somewhat/very affected by *whale watching boat traffic and wakes* increased from 40% in 2022 to 47% in 2023.
- Although not shown in the table below, those very affected by *crowding on sidewalks downtown* increased from 30% in 2022 to 36% in 2023.
- Although not shown in the table below, those very affected by *air emissions from cruise ships* dropped from 23% in 2022 to 14% in 2023.

Table 12. TREND: Somewhat + Very Affected, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022 23
Crowding at Mendenhall Glacier	57	57	63	+6
Crowding on sidewalks downtown	57	56	59	+3
Vehicle congestion downtown	57	51	61	+10
Flightseeing noise	41	46	43	-3
Air emissions from cruise ships	36	42	36	-6
Vehicle congestion outside of downtown	36	42	45	+3
Whale watching boat traffic and wakes	41	40	47	+7
Crowding on trails	34	38	40	+2

CBJ Tourism Management

Overall Management

When asked whether CBJ is doing enough to manage the impacts of the visitor industry, respondents were most likely to say they were *not doing enough* (56%) followed by *just the right amount* (33%). Only 4% said they were doing *more than enough*, and 7% didn't know.

- Residents of North Douglas, Downtown/Thane, and Douglas/West Juneau were more likely to say CBJ was *not doing enough* at 70%, 67%, and 65%, respectively; this compares with 57% of Out the Road residents, 52% of Valley residents, and 47% of Creeks residents.
- Those working in Downtown/Thane were more likely to say CBJ was *not doing enough* at 62%; this compares with 51% of those working in the Valley and 42% of those working in the Creeks area.

Table 13. Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?

n=516	% of Total
More than enough	4
Not enough	56
Just the right amount	33
Don't know	7

Comparing to Past Survey

The percentage of respondents saying CBJ is *not doing enough* increased from 45% in both 2021 and 2022 to 56% in 2023, while those saying they were doing *just the right amount* fell from 41% in 2022 to 33% in 2023.

Table 14. TREND: CBJ Tourism Management, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022 23
More than enough	7	4	4	-
Not enough	45	45	56	+11
Just the right amount	39	41	33	-8
Don't know	9	10	7	-3

Cruise Ship Limitations

A new question in the 2023 survey asked respondents their preference for future cruise passenger volume in Juneau. The full question read:

Earlier this year CBJ and the cruise industry agreed to a limit of five large ships per day. As a result, cruise passenger volume is projected to flatten over the next two years. What is your preference for future cruise passenger volume in Juneau?

One-half of respondents (50%) said they wanted future cruise passenger volume in Juneau to be lower, including 31% who wanted it slightly lower and 19% who wanted it much lower. Eleven percent said they wanted volume to be higher, including 8% who wanted it slightly higher and 3% who wanted it much higher. One-third of respondents (33%) wanted to keep volume the same, while 4% had no opinion.

- Valley and North Douglas residents were the least likely to say they wanted volume to be lower at 42% and 46%, respectively. This compares with 55% of Out the Road residents, 56% of Downtown/Thane residents, 57% of Douglas/West Juneau residents, and 64% of Creeks residents.
- Women were more likely to say they wanted volume to be lower at 61%, compared with 43% of men.

Table 15. What is your preference for future cruise passenger volume in Juneau?

n=517	% of Total
Keep it the same	33
Higher TOTAL	11
Much higher	3
Slightly higher	8
Lower TOTAL	50
Slightly lower	31
Much lower	19
No opinion	4
Don't know	1

Tourism Best Management Practices

TBMP Awareness

Respondents were asked how familiar they were with the Tourism Best Management Practices (TBMP) program. A majority of respondents (62%) were not familiar; 22% were somewhat familiar; and 14% were very familiar.

- Downtown/Thane and North Douglas residents were the most likely to be somewhat or very familiar at 53% and 55%, respectively; this compares with 49% of Out the Road residents, 42% of Douglas/West Juneau residents, 30% of Valley residents, and 26% of Creeks residents.
- Younger respondents were less likely to be somewhat or very familiar at 19%; this compares with 37% of middle-aged respondents and 48% of older respondents.

Table 16. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. It includes a hotline for reporting concerns about tourism.
Are you very familiar, somewhat familiar, or not familiar with this program?

n=517	% of Total
Very familiar	14
Somewhat familiar	22
Not familiar	62
Don't know/refused	1

Comparing to Past Survey

Those not familiar with TBMP increased from 54% in 2021 to 57% in 2022 to 62% in 2023.

Table 17. TREND: CBJ Tourism Management, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022 23
Very familiar	14	16	14	-2
Somewhat familiar	32	26	22	-4
Not familiar	54	57	62	+5

TBMP Effectiveness

Among those somewhat or very aware of TBMP, 15% said the program was very effective; 49% said it was somewhat effective; and 27% said it was not effective.

Table 18. Do you think this program has been very effective, somewhat effective, or not effective at managing tourism impacts on residents? (%)

Base: Somewhat or very familiar with TBMP

n=205	% of Base
Very effective	15
Somewhat effective	49
Not effective	27
Don't know/not aware	9

Comparing to Past Survey

The percentage of respondents saying TBMP was not effective increased from 15% in 2022 to 27% in 2023.

The 2021 question was more detailed, asking respondents to rate TBMP's effectiveness on three factors, rather than overall, preventing inclusion in the trend analysis.

Table 19. TREND: Effectiveness of TBMP, 2022, 2023 (%)

	2022	2023	Change 2022 23
Very effective	17	15	-2
Somewhat effective	52	49	-3
Not effective	15	27	+12
Don't know/not aware	16	9	-7

Tourism Initiatives

CBJ Tourism Department Priorities

Respondents were asked what level priority should be placed on seven different CBJ tourism activities. The highest-rated priorities were *reducing traffic congestion* (42% said this should be high priority), *shore power* (40%) and *supporting Travel Juneau in growing the independent visitor market* (39%). *Extending the Seawalk* (25% high priority) and *renovating Centennial Hall* (22%) received a lower priority rating.

- North Douglas residents were the most likely to place a high priority on *supporting Travel Juneau in growing the independent visitor market* at 60%; this compares with 48% of Creeks residents, 38% of Out the Road residents, 37% of Valley residents, 33% of Douglas/West Juneau residents, and 30% of Downtown/Thane residents.
- North Douglas residents were the most likely to place a high priority on *renovating Centennial Hall* at 38%; this compares with 24% of Valley residents, 21% of Creeks and Downtown/Thane residents, 15% of Out the Road residents, and 13% of Downtown/West Juneau residents.
- Out the Road residents were the most likely to place a high priority on *managing impacts from tours on residents throughout the Borough* at 53%; this compares with 46% of North Douglas residents, 37% of Creeks and Valley residents, 34% of Douglas/West Juneau residents, and 30% of Downtown/Thane residents.
- Creeks residents were the least likely to place a high priority on *further limiting cruise ship volume* at 25%; this compares with 32% of Valley residents, 35% of Downtown/Thane residents, 41% of Douglas/West Juneau residents, 43% of Out the Road residents, and 45% of North Douglas residents.
- Older respondents placed a higher priority on *shore power*: 53% rated this as high priority, compared with 36% of middle-aged respondents and 27% of younger respondents. This pattern repeated for *reducing traffic congestion* (48%, 41%, 36%), *extending the Seawalk* (30%, 24%, 19%), *further limiting cruise ship volume* (43%, 32%, 26%), and *managing impacts from tours on residents throughout the Borough* (51%, 41%, 23%).

See table, next page

Table 20. Should the CBJ Tourism Department place a high priority, medium priority, or low priority on each of the following items? (%)

n=517	High Priority	Medium Priority	Low Priority	Not a priority	Don't know
Reducing traffic congestion	42	31	16	6	4
Shore power	40	27	18	7	8
Supporting Travel Juneau in growing the independent visitor market	39	29	19	8	4
Managing impacts from tours on residents throughout the Borough	38	28	21	7	4
Further limiting cruise volume	34	21	29	11	3
Extending the Seawalk	25	24	35	11	4
Renovating Centennial Hall to attract more conferences	22	26	29	18	5

When asked which priority was most important, the number one response was *managing impacts from tours on residents throughout the Borough* (23%) followed by *reducing traffic congestion* (18%) and *further limiting cruise volume* (15%).

- Valley residents were the most likely to select *reducing traffic congestion* at 21% while North Douglas and Out the Road residents were the least likely at 8% and 11%, respectively.
- Douglas/West Juneau residents were the mostly likely to select *shore power* at 24%; this compares to between 4% and 11% of other residents.

Table 21. Of the priorities I just mentioned, which one do you think is MOST important? (%)

n=517	% of Total
Managing impacts from tours on residents throughout the Borough	23
Reducing traffic congestion	18
Further limiting cruise volume	15
Shore power	11
Supporting Travel Juneau in growing the independent visitor market	10
Extending the Seawalk	8
Renovating Centennial Hall to attract more conferences	5
Don't know	8

Comparing to Past Survey

Because several priorities were changed between 2022 and 2023, and the category “not a priority” was added to the list of options, no comparison of 2023 results can be made to past years.

Seasonality

A new question in 2023 asked respondents for their level of support/opposition to the lengthening of the cruise season into April and October. Nearly one-half (48%) said they were supportive, including 12% very supportive; 41% were opposed, including 14% very opposed; and 9% had no opinion.

- Valley residents were the most likely to be supportive at 53%; Downtown/Thane were the least supportive at 39%.
- Those who work in the Valley were the most likely to be supportive at 63%; this compares with 51% of those working in the Creeks area and 38% of those working in Downtown/Thane.

Table 22. In recent years the cruise ship season has become longer, lasting from mid-April to mid-October in 2023. Are you very supportive, supportive, opposed, or very opposed to cruise ships arriving in April and October? (%)

n=517	% of Total
Supportive TOTAL	48
Very supportive	12
Supportive	36
Opposed TOTAL	41
Opposed	27
Very opposed	14
No opinion	9
Don't know	2

Visitor Distribution

Respondents were slightly more likely to agree with the statement *CBJ should work to keep visitors concentrated in areas developed for tourism* (40%) than to agree with *CBJ should work to spread visitors throughout the Borough* (34%). One-quarter (26%) said neither, or they didn't know.

- Valley residents were the most likely to agree with *CBJ should work to keep visitors concentrated in areas developed for tourism* at 45%; North Douglas residents were the least likely at 27%.

Table 23. Which of the following statements best reflects your opinion? (%)

n=517	% of Total
CBJ should work to keep visitors concentrated in areas developed for tourism	40
CBJ should work to spread visitors throughout the Borough	34
Neither/don't know	26

Comparing to Past Survey

The percentage of respondents choosing CBJ should work to spread visitors throughout the Borough went down from 42% in 2022 to 34% in 2023, while the percentage saying "neither/don't know" increased from 16% to 26%.

Table 24. TREND: Visitor Distribution (%)

	2022	2023	Change 2022 23
CBJ should work to keep visitors concentrated in areas developed for tourism	42	40	-2
CBJ should work to spread visitors throughout the Borough	42	34	-6
Neither/don't know	16	26	+10

Tourism Employment

One-fifth of respondents (20%) said that they or a member of their household had been employed in the Juneau tourism industry sometime in the past five years.

Table 25. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?

n=513	% of Total
Yes	20
No	80

Among those reporting a household member employed in tourism, the average number of household members employed in tourism was 1.6 people.

Table 26. How many people?
Base: Household member employed in tourism

n=101	% of Base
1	66
2	24
3	4
4+	5
Average	1.6 people

Comparing to Past Surveys

The percentage of people saying a household member was or had been employed in tourism decreased from 38% in 2022 to 20% in 2023, while the average number of household members employed increased from 1.8 to 1.6.

Note that in the 2002 and 2006 surveys, the length of time was two years rather than five years.

Table 27. TREND: Household Member Employed in Juneau Tourism
2002, 2006, 2021, 2022, 2023

	2002 Past 2 years	2006 Past 2 years	2021 Past 5 years	2022 Past 5 years	2023 Past 5 years	Change 2022 23
Household member employed	21%	23%	32%	38%	20%	-18%
Average number	1.4 people	1.4 people	1.5 people	1.8 people	1.6 people	-0.2 people



Respondent Characteristics

The tables in this section show unweighted data to accurately reflect sample characteristics. (All survey data in the preceding tables was weighted by age and neighborhood of residence; please refer to Methodology section for more detail on weighting.)

Respondents were most likely to live in the Mendenhall Valley (43%) followed by Downtown/Thane (15%), Douglas/West Juneau (15%), Brotherhood Bridge/Out the Road (12%), Salmon Creek/Lemon Creek/Switzer Creek (10%), and North Douglas (5%).

Respondents who reported being employed were most likely to work in Downtown/Thane (34%) followed by the Valley (26%) and Borough-wide (13%).

Table 28. In which area of the City and Borough do you live? (All Respondents)
In which area of the City and Borough do you work? (Base: Employed)
UNWEIGHTED

	n=517 LIVE % of Total	n 359 WORK % of Those Employed
Mendenhall Valley	43	26
Downtown/Thane	15	34
Douglas/West Juneau	15	3
Brotherhood Bridge/Out the Road	12	5
Salmon Creek/Lemon Creek/Switzer Creek	10	11
North Douglas	5	2
Outside of city	n/a	5
Borough-wide	n/a	13
Don't know/refused	1	1

Table 29. Are you currently employed?
UNWEIGHTED

n=517	% of Total
Yes	69
No	29
Don't know/refused	1

Respondents were about half male (50%) and half female (44%). Note that gender was not asked directly of respondents; surveyors made assumptions based on voice, resulting in 6% “don’t know” responses.

**Table 30. Gender
UNWEIGHTED**

n=517	% of Total
Male	50
Female	44
Don't know	6

Respondents reported an average age of 51 (only adults over 18 were eligible); the most common age group was 55 to 64 (20%).

**Table 31. Age
UNWEIGHTED**

n=499	% of Total
18-24	7
25-34	16
35-44	17
45-54	17
55-64	20
65-74	15
75+	9
Average age	51 years old

Appendix

Respondent Comments

While respondents were not asked directly to provide comments, interviewers were instructed to record comments when they were offered.

Main Themes

Transportation and Traffic Issues:

Request for additional city buses during tourist season
Addressing crowded driving downtown
Overcrowding on city buses affecting locals' commutes
Traffic congestion from tour buses and vehicles

Housing and Infrastructure:

Concerns about housing for residents and workers in the tourism industry
Infrastructure development for housing and better public transportation

Environmental Concerns:

Waste management, pollution, and environmental impact from cruise ships
Noise pollution from helicopters, boats, and cruise ships
Impact on wildlife, especially whales

Economic and Social Impact:

Taxation issues affecting locals and businesses
Unequal distribution of economic benefits among locals and non-resident business owners
Disruption of daily life for locals during tourist seasons

Tourist Experience and Management:

Suggestions to regulate and limit the number of tourists and vessels
Balancing the needs of tourists and locals for a better quality of life
Diversifying tourist activities to include more local experiences

Government Management and Priorities:

Criticism of CBJ's management and handling of tourism-related issues
Prioritizing locals' needs over the tourism industry

Miscellaneous Concerns and Suggestions:

Specific complaints about noise, congestion, waste, and other nuisances caused by tourism
Concerns about the focus on tourism over the well-being of residents

Verbatim Comments

- Add additional city buses during tourist season.
- Address the crowded driving downtown.
- Address the housing for people.
- Appreciate the shoulder seasons for helping local business and volume is low enough not be a major impact on residents.
- April through October timeline is fine for cruise ships but they should not increase number of passengers during that time. Keep the number of passengers with a longer period of time to alleviate effects on community.
- Apartments owned by Diamond International in Douglas are slumlords with junked cars, etc. If they own buildings they should be cleaned up and up the standards of the neighborhood.
- Be considerate to locals and not cater to the tourists.
- Bike tours are dangerous.
- Build a new floating dock specifically for charter boats.
- Capitol buses overloaded with tourists.
- Cargo docks need to be past the yacht club.
- CBJ are not managing the congestion and waste dumping from vessels or people flooding downtown.
- CBJ does too much to manage impacts of tourism industry. CBJ should not be a function of the tourist industry.
- CBJ is not paying attention to the sanitation of too many people that are coming in.
- CBJ needs to address the broad-band bottleneck when ships are in.
- CBJ needs to address the taxes placed on locals.
- CBJ needs to have better management of the tourist industry.
- CBJ needs to keep the trash cans and restrooms open for locals.
- CBJ needs to manage the money better. Give more to the locals.
- CBJ needs to recognize small business not related to tourism.
- CBJ should increase head tax from visitors.

- CBJ should spread the tourists throughout the borough to benefit businesses owned by locals. Downtown businesses are owned by out-of-towners and therefore the local economy does not benefit as much as that money goes out of state.
- CBJ track pathogens through wastewater, cruise ships are a primary vector of introducing diseases into our community and thinks DOH need to help manage the impacts of these diseases into the city. This is an unquantified impact on our community.
- Cell service does not work when ships are docked. The extension of the season from April-October is okay if they keep current number of passengers. There should be discussion on head tax to use funds to better Juneau's infrastructure like cell service.
- Citizens of Juneau have become second class citizens, tourists take precedence, not a good thing. Moving homeless to the valley so as not to upset the tourists was not a good thing.
- City buses overcrowded with tourists, no room for locals to get to work.
- City council take into consideration locals when planning.
- City needs to use money from cruise tax to pay for police and infrastructure to improve and relieve current situation.
- Concentration of everything downtown is negative: spread it out.
- Cruise ship passenger volume should be taken into consideration, not number of ships. Ships today hold over 5,000 passengers now.
- Cruise ships clog up channel 16, the marine channel, and they need to decrease their use of it. Commercial fishing is shut out and there is too much emphasis on tourist industry.
- Cruise ships should not be allowed to dump their trash in Juneau as waste management has had to raise premiums for residents.
- Cruise volume should go up as docks expand to the Seawalk. More studio apartments should be built for seasonal tourists and industry employees.
- Cut back the taxes placed on locals and their businesses.
- Cut the number of boats in half. There are 30 boats by the whales. Locals can't do their fishing.
- Decongest downtown with smaller buses, spread people out more.
- Develop infrastructure for people who need a place to live while working here.
- Do not stop the folk festival to renovate centennial hall.
- Do something about tourists riding local buses. Locals cannot get on buses to get to work.
- Does not agree with locals having to pay to go to the glacier.
- Does not care what the industry does.
- Does not support the tourist industry at all.
- Downtown area is full of tourists, pricing out locals.
- Enjoys and supports tourism. She is a frequent tourist herself in other places.

- Expose tourists to more Native-related activities.
- Five cruise ships is not a limitation, all they do is get more passengers. They must cap the number of passengers.
- Flightseeing noise must be addressed. Too many helicopters and plane noise especially for boaters on the water in local areas.
- Happy we are conducting this survey.
- He is a customs officer and would not be employed if not for tourism.
- Helicopter noise
- Housing
- I don't go downtown except for work during cruise ship season.
- If the money is staying in Juneau, fine. If not, limit the people coming in.
- JPD should be downtown watching people parking in yellow lines.
- Juneau is being run over with tourists.
- Juneau is too focused on tourists and needs to focus on year-round residents.
- Keep buses off small streets above 4th street.
- Less tourism
- Limit on number of whale watch ships. Very bothered by number of helicopters. Bothered by increased traffic on back-loop. Bothered by amount of bus traffic using the Statter harbor parking lot. Shocked by the amount of pollution from the large cruise ships. Irritated that ships reduced to five but not the number of people.
- Limit the boat volume and the people.
- Limit the passengers on board, put permits on passengers. Limit the number of boats.
- Local people missed work because they could not get on the bus because it was crowded with tourists.
- Local phone service affected (i.e. dropped calls, no texts or calls received or sent or no service at all).
- Lowering property tax is more important than tourist industry.
- Manage better vessels coming in.
- Manage the congestion of large tour buses, vans, etc. Place in smaller vehicles.
- Manage the people, big distrust in CBJ.
- Managing the people coming to the hospital for non-threatening injuries. Need to tell them about Urgent care.
- More and better public transportation needs to be addressed.
- More docks for more ships. Eco-friendly way to move tourists out of downtown.
- More usage of hydropower so as not to drain the electricity from the town.
- More use of other fuels for tour buses.
- Need better infrastructure for walking and moving around the area.
- Need clarification on environmental effects to the oceans!
- Need more and better public transportation (x2).
- Need more parking.

- Need to have a fee to see Juneau.
- Need to regulate speed for the whale watchers and cut back on the amount of boats.
- No more docks in downtown.
- Not enough city buses, so crowded locals couldn't get to work. The tourism industry should be involved with used buses or something.
- Not enough housing, housing should come first.
- Not enough parking downtown.
- Not enough transportation to the glacier.
- Overcrowding on city buses.
- Overcrowding from whale watch tours and environmentally destructive boat wakes.
- Permits on passengers.
- Please make survey questions related to how people really think of this industry.
- Poor management of CBJ not giving detailed information for the public.
- Property taxes are too high.
- Public buses have too many tourists.
- Public transportation is too crowded for locals to ride during cruise ship arrivals.
- Public transportation needs to be addressed because locals dependent on it suffer during tourist times.
- Questions are confusing. Not enough information.
- Questions are confusing: extend the sidewalk to where? What's limiting the cruise volume?
- Questions are leading. Not what people want to know.
- Raise sales tax during tourist season to pay for road maintenance.
- Re: traffic congestion, no more roundabouts.
- Reduce the number of tourists and keep them concentrated in tourist areas.
- Reduce whale watchers.
- Regulate the dumping from the vessels and hitting the whales.
- Regulate the number of people coming to Juneau. Place visas on them.
- Regulating of dumping waste, from the vessels here in Juneau.
- Residents are neglected at expense of tourists.
- Review potential impact to power grid before giving them power.
- Southeast Alaska depends on tourism. We should encourage growth. Put a dock on the backside of Douglas Island.
- Selling the city to Norwegian cruise ships.
- She liked that ethnicity and income were not asked in this survey.
- She would rather a question on fecal matter being released into Juneau waters.
- She is in her 80s and loves the ships coming in.
- Ship passenger limit should coincide with the number of passenger the tours and buses can handle.
- Ships in April okay, not in October.

- Ships should be distributed more evenly throughout the week.
- Should limit the people at the glacier.
- Spread out the arrival and departure of ships.
- Stop garbage dumping of the ships.
- Stop letting shops on Franklin put out their garbage the night before pickup. The bears are making a terrible mess for city workers to clean up.
- Stop unnecessary blowing of horns on ships.
- Suggest the tourists take their own tour buses rather than the local bus system that the locals are using.
- Supplying housing for the people who work the tourist trade should be a priority for the city.
- Sustainable electric and hydro use.
- Tear down JACC and Centennial Hall and build one better building.
- The changes made to regulate the noise in the downtown harbor worked! It is much better than it used to be. Closing the waterfront to citizens was horrible and it should be reversed.
- The city seems more interested in the money than the impact on citizens.
- The independent visitor is an important sector but they have impacts on our local housing situation.
- The internet usage needs to be additional; the locals cannot use the services when cruise ships are in port.
- The October cruise schedule is a bit too wet and risky for weather and shops are closed.
- The priority should be the homeless.
- The roads in town are horrible. They should be addressed before the tourism question.
- The tour companies should hire locals to work locally, not bring in people from outside just for the season.
- The transit system is over-run in the summer with tourists and locals cannot get on to ride.
- There needs to be a balance. Need to make sure that visitors are getting a genuine experience and not a Disney experience. Cruise ship is a hazard and a risk where they get a mickey mouse experience. Quality of experience is diminished when cruise ships are involved.
- There should be more transportation for crew members.
- There should be only three or four days a week there are tour ships in, not every day.
- To limit the number of passengers coming to Juneau.
- Too many people and ships...too much!
- Too many people at the glacier and downtown.
- Too many people!

- Too many people, not enough infrastructure.
- Too many whale boats (over 50) non-stop all day.
- Too many whale boats in Auke Bay harbor.
- Tour industry should pay for installing electric power to ships.
- Tour ships should not be allowed to use the landfill.
- Tourists filled local buses so residents could not get to work.
- Tourists in April are fine but bringing them in late October seems unfair to the tourists as the weather is crummy.
- Tourists put pressure by Airbnb on Juneau housing market now running 145% above national average.
- Regular trails need better demarcation and tourists need to be kept from wandering through woods.
- Traffic congestion was city's fault and not tourism with the single lane that went into downtown.
- Travel Juneau should be focused on locals.
- Very upset about tourism.
- Vessel traffic on the water and the dumping.
- Volume is the problem for both residents and visitors.
- We need more hotels.
- We need to bring as much business with tourists as possible to recover from no business for two years. We can level out and reduce the number of tourists and ships later.
- Whale tours are obnoxious to recreational boaters. TBMP minimizes any complaints.
- Whale watching should be out of North Douglas.
- What is the head tax being used on? There is a lot of litter by the whale statue and why do they not hire someone to clean up?
- Witnessed harassment of whales by tours.
- Worry about the health of whales from the whale watching tours. The CBJ opinion survey about the number of cruise ships had loaded questions skewed to the answer CBJ wanted.
- Would be nice to have at least one day each week with far less tourist volume.
- Would like to see fewer visitors to provide a better quality of experience.
- Year-round residents need to be taken into account more so than those who own businesses and are not year-long residents. Too much emphasis is on tourist experience and oftentimes the awful locals' experience is not taken into account when deciding on these things.

Survey Instrument

See attached.

Hello, this is _____ with McKinley Research. We are doing a study for CBJ asking Juneau residents their opinions about the visitor industry. Can I ask you a few questions?

1. **Do you currently live in Juneau?** 01 Yes 02 No [thank and end survey]
2. **Did you live in Juneau this past summer?** 01 Yes 02 No [thank and end survey]
3. **Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household? [Read 1-4]**
 - 01 Positive impact (skip to Q5)
 - 02 Negative impact (skip to Q5)
 - 03 Both (ask 4)
 - 04 No impact at all (skip to Q5)
 - 05 Don't know (skip to Q5)
 - 06 Refused (skip to Q5)
4. **Do you feel the positive impacts outweigh the negative impacts or do the negative impacts outweigh the positive impacts?**
 - 01 Positive impacts outweigh negative
 - 02 Negative impacts outweigh positive
 - 03 Neutral/neither
 - 04 Don't know
 - 05 Refused
5. **For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023? By "affected" we mean changing your use of an area in addition to other kinds of impacts.**

	Very affected	Somewhat affected	Not affected	Don't Know	Refused
a. Vehicle congestion downtown	1	2	3	4	5
b. Vehicle congestion outside of downtown	1	2	3	4	5
c. Crowding on sidewalks downtown	1	2	3	4	5
d. Crowding on trails	1	2	3	4	5
e. Crowding at Mendenhall Glacier	1	2	3	4	5
f. Whale watching boat traffic and wakes	1	2	3	4	5
g. Flightseeing noise	1	2	3	4	5
h. Air emissions from cruise ships	1	2	3	4	5

6. **Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?**
 - 01 More than enough
 - 02 Not enough
 - 03 Just the right amount
 - 04 Don't know
 - 05 Refused

Section G, Item 4.

- | | | | |
|----|-------------------|----|---------------------------|
| 01 | Very familiar | 03 | Not familiar (skip to Q9) |
| 02 | Somewhat familiar | 04 | DK/Refused (skip to Q9) |

01	Very effective	03	Not effective
02	Somewhat effective	04	DK/Refused

01	Keep it the same	04	Slightly higher	06	No opinion
02	Slightly lower	05	Much higher	07	Don't know
03	Much lower			08	Refused

01	Very supportive	05	No opinion
02	Supportive	06	Don't know
03	Opposed	07	Refused
04	Very opposed		

14. Which of the following statements best reflects your opinion? (Read 1-2)

- 01 CBJ should work to spread visitors throughout the Borough **OR**
02 CBJ should work to keep visitors concentrated in areas developed for tourism
03 Neither/don't know

Section G, Item 4.

READ: I have a few last questions for demographic purposes.

15. In what year were you born? _____ [zero if refuse]

16. In which area of the City and Borough do you live?

- | | |
|---|------------------------------------|
| 01 Downtown/Thane | 05 North Douglas |
| 02 Douglas/West Juneau | 06 Brotherhood Bridge/out the road |
| 03 Salmon Creek/Lemon Creek/Switzer Creek | 07 Don't know |
| 04 Mendenhall Valley | 08 Refused |
| | 09 Other _____ |

[If DK/refused: "Surveys without a response to this question may not get counted because we need to make sure we're surveying the right number of people from each area. Can you reconsider sharing your area?"]

17. Are you currently employed? 01 Yes 02 No (Skip to Q19) 03 Don't know/refused (Skip to Q19)

18. In which area of the City and Borough do you work?

- | | | |
|---|------------------------------------|----------------|
| 01 Downtown/Thane | 05 North Douglas | |
| 02 Douglas/West Juneau | 06 Brotherhood Bridge/out the road | |
| 03 Salmon Creek/Lemon Creek/Switzer Creek | 07 Borough-wide | |
| 04 Mendenhall Valley | 08 Outside of city | 10 Refused |
| | 09 Don't know | 11 Other _____ |

19. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?

- 01 No
02 Yes, How many people? # _____
03 Refuse

Thank you for participating in this important project! [end survey]

20. Record gender [don't ask] 01 Male 02 Female 03 Don't know

21. [Write additional comments only if shared]

22. Phone # _____ Survey # _____ Data entered initials _____

23. Interviewer Name _____ Date _____

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JUNEAU CRUISE PASSENGER SURVEY 2023

December 2023

PREPARED FOR:

City and Borough of Juneau



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Executive Summary

The City and Borough of Juneau contracted with McKinley Research Group to conduct an intercept survey of cruise passengers on the Juneau docks in summer 2023. The survey of 510 passengers was conducted between early July and late September and targeted passengers traveling on ships with more than 250 berths. The survey sample was designed to reflect an appropriate mix of ships by line, vessel size, and dock location.

Following are key findings from the survey.

Tours/Attractions

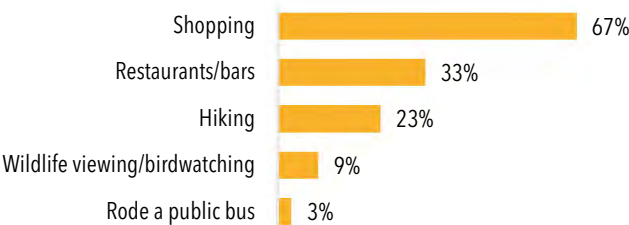
Seven out of ten passengers (70%) reported purchasing at least one paid tour in Juneau. The most common tours were the tram (20%), day cruise (18%), bus tour to glacier (18%), and salmon bake (10%).

The top attractions visited were Mendenhall Glacier (26%), Whale statue (12%), Totem Pole trail (9%), and the Capitol Building (7%).

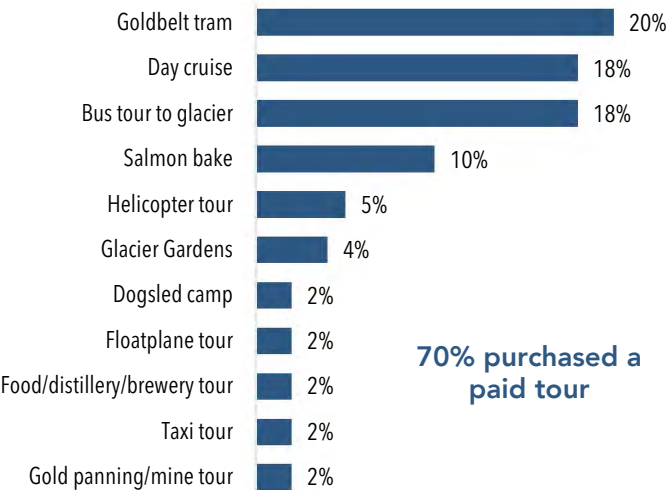
Passengers were asked whether they had engaged in additional activities including shopping (67%), restaurants/bars (33%), hiking (23%), and wildlife viewing/bird-watching (9%).

Passengers reported spending an average of 5.3 hours off their ship in Juneau.

Top Additional Activities <1% participation

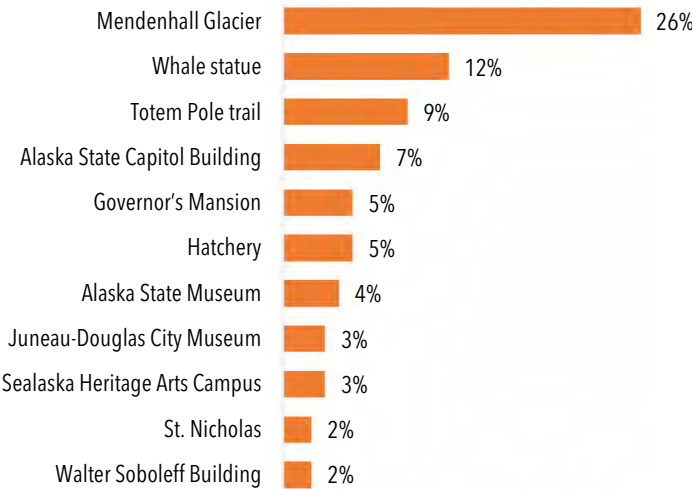


Top Paid Tours/Excursions <1% participation



70% purchased a paid tour

Top Attractions Visited <1% visitation



Spending

Passengers were asked how much their traveling party spent in four categories. Party size was applied to spending to arrive at per-person averages. The average total spent was \$232 per person, including \$129 on tours and activities, \$84 on gifts, souvenirs, and clothing, \$17 on food and beverage, and \$2 on transportation.

Average Per-Person Spending in Juneau Including pre-paid tours

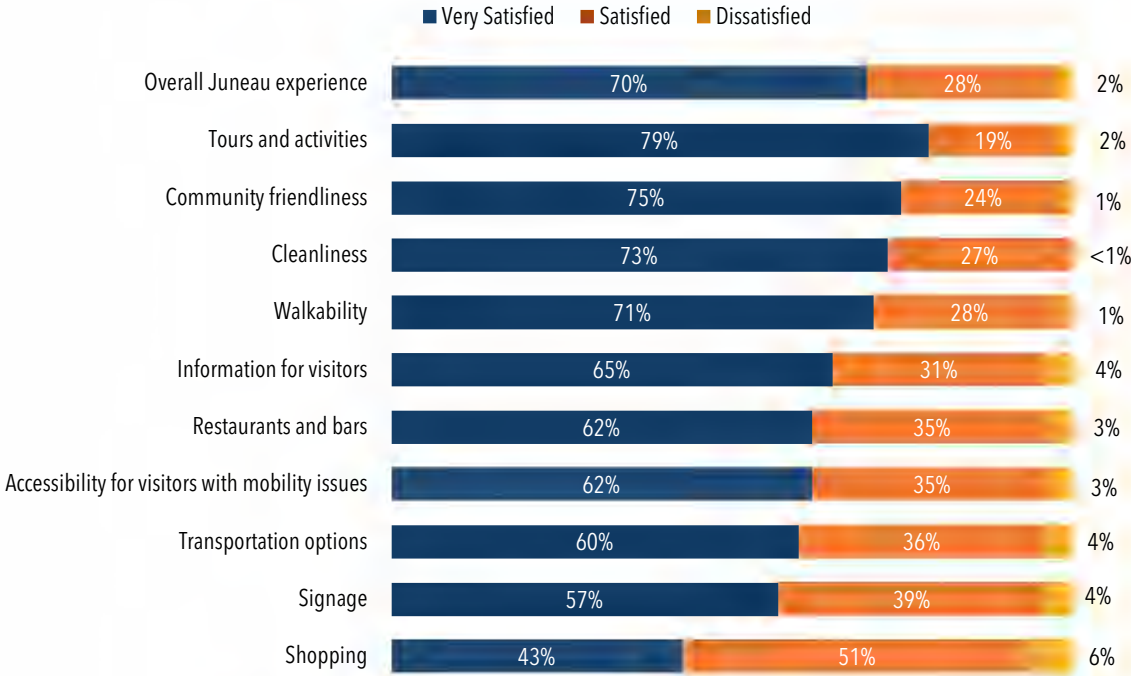


Satisfaction

Nearly all passengers (98%) were satisfied with their overall Juneau experience, including 70% who were very satisfied. Among the ten specific satisfaction categories, passengers gave the highest very satisfied ratings to tours and activities (79%) and community friendliness (75%); lower ratings were given for shopping (43%) and signage (57%). Dissatisfied ratings were very low, ranging from less than 1% to 6%. Note that passengers responding with “don’t know” or “does not apply” were removed from the base for each question.

Satisfaction Ratings

Base: Excludes “Don’t know” and “Does not apply” responses



Note: “Dissatisfied” includes “very dissatisfied” and “dissatisfied” responses.

Crowding

When passengers were asked how they would describe Juneau as a place to visit in terms of crowding, the most common response was “somewhat crowded” (44%) followed by “not very crowded” (30%), “not at all crowded” (13%), and “very crowded” (12%).

A follow-up question asked passengers whether they felt negatively impacted by crowding during their visit; only 7% answered affirmatively.

Repeat Juneau Travel

One-quarter of passengers (24%) had been to Juneau before, nearly all of them (94%) on a cruise ship. Three-quarters of passengers (73%) said they were likely or very likely to return; of these respondents, 79% said they would likely return by cruise, and 18% said they would return by air.

Demographics

Passengers were most likely to be from the Southern U.S. (28%), followed by the Western U.S. (26%), Midwest (18%), East (13%), and international (14%). The most common states of origin were California (10%), Florida (6%), Washington (6%), New York (6%), and Texas (5%). The most common international country of origin was Canada (9%).

Passengers reported an average party size of 2.8 people, with 61% in two-person parties. The average age among all party members was 55 years. The gender breakout (counting all party members) was 46% male, 53% female, and 1% other. Passengers reported an average household income of \$139,000.

How would you describe Juneau as a place to visit in terms of crowding?

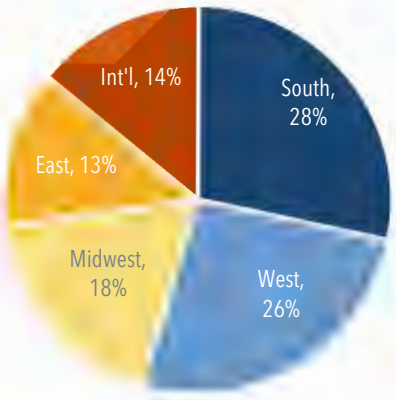


Did you feel negatively impacted by crowding during your Juneau visit?



Note: Excludes “don’t know” responses.

Passenger Origin



Passenger Demographics

	% of Total
Average party size	2.8 people
Average age	55 years old
Male/Female/Other	46/53/1
Average household income	\$139,000

Introduction and Methodology

Introduction

The City and Borough of Juneau (CBJ) contracted with McKinley Research Group (MRG) to conduct a survey of cruise passengers about their Juneau experience. The survey was conducted in person at cruise ship dock areas in Juneau during the 2023 cruise season. Areas of questioning included activities, attractions, length of visit, spending, satisfaction, trip planning, and demographics. Results from the survey will be used to guide CBJ tourism planning.

Methodology

The intercept survey of cruise passengers was conducted between July 2 and September 18, 2023. The survey instrument was designed by the study team in cooperation with CBJ staff. The sample was designed to reflect Juneau’s overall large and mid-size cruise ship market, with an appropriate mix of ships by line, dock location, and vessel size. (Ships with fewer than 250 berths were excluded from the sample; they represent less than one-half of 1% of all passengers.)

A total of 510 surveys were completed with passengers. 36 separate port calls were targeted for surveying, with 15 to 20 surveys conducted for each targeted sailing. The margin of error at the 95% confidence level is $\pm 4.4\%$.

Table 1. Passenger Sample Sizes by Cruise Line

	Sample Size
Princess	105
Norwegian	94
Royal Caribbean	55
Holland America	56
Carnival	46
Celebrity	48
Disney	37
Luxury mid-size*	69
Total	510

*These vessels have between 300 and 1,000 berths and include the lines Viking, Oceana, Regent, Silversea, Seabourn, and Windstar.

Uniformed and trained surveyors approached passengers on a random basis one to three hours before sailing time. Passengers were screened to ensure they were sailing on the designated vessel and were offered an Alaska keepsake pin as a gesture of appreciation for their time.

Data was weighted by cruise line to be representative of the overall market. Please see the Appendix for further detail on target samples and weighting by cruise line. Survey results are representative of passengers calling at Juneau over the three-month sample period, rather than the entire April-October cruise season.

Please see the "Comparison with 2016 Survey" section for a discussion of how 2023 results compare to a similar survey of Juneau cruise passengers conducted in 2016. "Other" responses to open-ended survey questions are provided in the Appendix.

Tours and Activities

Passengers were asked a series of questions about their activities while in Juneau. They were shown a list of possible responses for each question.

- *What paid tours did you participate in today?*
- *Did you visit any of these attractions today?*
- *Did you participate in any other activities while in Juneau?*

Seven out of ten passengers (70%) reported participating in some kind of paid tour or activity while in Juneau. The most common paid tours were the tram (20%), day cruises (18%), and bus tours to the glacier (18%).

Table 2. What paid tours did you participate in today?

N 508	% of Total		% of Total
Purchased a paid tour	70	Sportfishing (inc. Chum Fun)	1
Goldbelt tram	20	Guided biking/Segway	1
Day cruise (whale watching, photography)	18	Guided hiking	1
Bus tour to glacier	18	City bus tour (Trolly, Eaglecrest bus)	1
Salmon bake	10	Rafting	1
Helicopter tour (inc. trekking, dogsledding, airboat)	5	Kayaking	1
Glacier Gardens	4	Jeep tour	1
Summer dogsled camp	2	Guided walking tour	<1
Floatplane tour (inc. fly-fishing)	2	Canoeing	<1
Food/distillery/brewery tour	2	Other	1
Taxi tour	2	Did not purchase a paid tour	30
Gold panning/mine tour	2		

When shown a list of Juneau's attractions and asked which they had visited, the most commonly visited attractions were Mendenhall Glacier (26%), the Whale statue (12%), and Totem Pole trail (9%). About one-half (53%) had not visited any of the listed attractions.

Table 3. Did you visit any of these attractions today?

N 510	% of Total
Mendenhall Glacier	26
Whale statue	12
Totem Pole trail	9
Alaska State Capitol Building	7
Governor's Mansion	5
Hatchery	5
Alaska State Museum	4
Juneau-Douglas City Museum	3
Sealaska Heritage Arts Campus	3
St. Nicholas Russian Orthodox Church	2
Walter Soboleff Building	2
Cope Park	2
Shrine of St. Therese	1
Basin Road	1
Jensen Olsen Arboretum	<1
None	53

Passengers were asked a third question about their activities not captured in the previous questions about paid tours and attractions. The most common of these activities were shopping (67% participated) and restaurants (33%). Nearly one-quarter (23%) said they went hiking, 9% engaged in wildlife viewing or bird-watching, and 3% rode a public bus.

Table 4. Did you participate in any other activities while in Juneau?

N 510	% of Total
Shopping	67
Restaurants/bars	33
Hiking	23
Wildlife viewing/birdwatching	9
Rode a public bus	3
Rented a car	1
Rented a bike/e-bike	1
Other	1

Passengers reported spending an average of 5.3 hours off their ship. The most common time frames were five hours (23%) and six hours (22%).

**Table 5. About how many hours
are you spending off the ship today?**

N 510	% of Total
One	1
Two	5
Three	10
Four	19
Five	23
Six	22
Seven	7
Eight	4
Nine or more	7
Average	5.3 hours

Spending

Passengers were asked how much their party spent in Juneau in four different categories: tours and activities (including pre-paid tours); gifts, souvenirs, and clothing; food and beverage; and transportation. Party sizes were applied to party spending to arrive at per-person averages. Those declining to respond or unsure of their spending were removed from the base.

Passengers reported spending an average of \$232 per person on their Juneau visit. The largest spending category was tours and activities (\$129) followed by gifts, souvenirs, and clothing (\$84), food and beverage (\$17), and transportation (\$2). An “other” category was suggested to respondents, but the average spending was \$0.

Passenger Spending in Juneau Per-Person Average	
N=463	Average Per Person
Tours and activities*	\$129
Gifts, souvenirs, and clothing	\$84
Food and beverage	\$17
Transportation	\$2
Total Per-Person Average	\$232

Excludes “don’t know” responses.
*Including pre-paid tours.

Satisfaction

Nearly all passengers (98%) were satisfied with their overall Juneau experience, including 70% who were very satisfied and 28% who were satisfied. Two percent were dissatisfied, including less than 1% who were very dissatisfied.

Table 6. Were you very satisfied, satisfied, dissatisfied, or very dissatisfied with your overall Juneau experience?

N 510		% of Total
Satisfied TOTAL		98
Very satisfied		70
Satisfied		28
Dissatisfied TOTAL		2
Dissatisfied		2
Very dissatisfied		<1

Passengers expressed the highest levels of satisfaction with tours and activities (79% very satisfied), community friendliness (75%), cleanliness (73%), and walkability (71%). Signage and shopping garnered the lowest very satisfied ratings at 57% and 43%, respectively. Those that responded “don’t know” or “does not apply” were removed from the base for the satisfaction questions.

Table 7. How satisfied were you with...

Base for Satisfaction Ratings Excludes “Don’t know” and “Does Not Apply” Responses

N 510	Satisfied TOTAL	Very satisfied	Satisfied	Dissatisfied TOTAL	Dissatisfied	Very dissatisfied
Cleanliness	100	73	27	<1	-	<1
Community friendliness	99	75	24	1	1	<1
Walkability	99	71	28	1	<1	<1
Tours and activities	98	79	19	2	2	<1
Restaurants and bars	97	62	35	3	2	1
Accessibility for visitors with mobility issues	97	62	35	3	1	1
Information for visitors	96	65	31	4	3	1
Transportation options	96	60	36	4	4	<1
Signage	96	57	39	4	3	1
Shopping	94	43	51	6	6	<1

Crowdedness

Passengers were asked how they would describe Juneau as a place to visit in terms of crowding. The most commonly selected response was “somewhat crowded” at 44% followed by “not very crowded” at 30%, “not at all crowded” at 13%, and “very crowded” at 12%.

A follow-up question asked passengers whether they felt negatively impacted by crowding during their visit; only 7% answered affirmatively.

Table 8. How would you describe Juneau as a place to visit in terms of crowding?

N 510	% of Total
Very crowded	12
Somewhat crowded	44
Not very crowded	30
Not at all crowded	13
Don't know	1

Table 9. Did you feel negatively impacted by crowding during your Juneau visit?

N 510	% of Total
Yes	7
No	92
Don't know	1

The 34 respondents who felt negatively impacted were asked where they had a negative experience with crowding. The most common responses were in stores/shopping (15 responses), sidewalks downtown (12), everywhere/all over (5), and overbooked tours (2). Responses mentioned once each included glacier, docks, onboard, line for tram, overbooked tram, and restaurant lines.

Trip Planning

Passengers were asked where they got their information about Juneau while in port. The most common responses were tour guides (24%), apps/websites (22%), cruise ship crew (22%), brochures (15%), and maps (15%). One-fifth (22%) did not mention any sources.

Table 10. While in port, where did you get information about Juneau?

N 510	% of Total
Tour guides	24
Apps/websites	22
Cruise ship crew	22
Brochures	15
Maps	15
Signs	10
Shop/restaurant workers	6
Visitor Information Centers	6
Tour booths	4
Guidebooks (Fodor's, Lonely Planet, etc.)	3
Friends or family	2
Travel Juneau Official Visitors Guide	2
Other	1
Don't know	1
None	22

Just 2% of passengers said they had contacted Travel Juneau before their cruise to plan their visit; another 3% said they didn't know.

Table 11. Did you contact Travel Juneau before your cruise to plan your Juneau visit?

N 510	% of Total
Yes	2
No	95
Don't know	3

Among passengers who had participated in a paid tour, the most common method of booking their tour(s) was through their cruise line (54%), followed by directly with the tour company (26%). Ten percent booked through a travel agent, and 10% booked through a booth on the dock.

Table 12. Did you book your tours through your cruise line, through a travel agent, at a booth on the dock, or directly with the tour company?

Base: Participated in paid tour

N 358	% of Base
Through cruise line	54
Directly with tour company	26
Through a travel agent	10
Booth on the dock	10
Other	1
Don't know	5

Previous and Future Juneau Travel

Three-quarters of passengers (75%) said the cruise was their first trip to Juneau. Among the 24% who had visited Juneau before, 94% said they had previously traveled to Juneau on a cruise ship. Based to all passengers, the percentage who had visited previously on a cruise ship changes to 22%.

Table 13. Is this your first trip to Juneau?

N 510	% of Total
Yes	75
No	24
Don't know	1

Table 14. Before this trip, had you traveled to Juneau on a cruise ship?

	% of Previous Travelers N 134	% of Total N 510
Yes	94	22
No	6	78

Nearly three-quarters of passengers (73%) said they were likely to return to Juneau, including 32% who were very likely and 41% who were likely. Eighteen percent said they were unlikely to do so, including 5% very unlikely and 13% unlikely. Ten percent didn't know.

Table 15. How likely are you to return to Juneau?

N 510	% of Total
Likely TOTAL	73
Very likely	32
Likely	41
Unlikely TOTAL	18
Unlikely	13
Very unlikely	5
Don't know	10

Among passengers likely to return, 79% said they would return to Juneau on a cruise ship, while 18% said they would return by air and 2% by ferry. Based to all passengers, 58% said they would return via cruise, 13% via air, and 2% via ferry.

Table 16. Do you think you'll return by cruise, air, or ferry?

	% of Those Likely to Return N 366	% of Total N=510
Cruise	79	58
Air	18	13
Ferry	2	2
Not sure	8	6

Demographics

Passengers were most likely to be from either the South (28%) or the West (26%) followed by the Midwest (18%) and the East (13%). Fourteen percent were from international countries, most commonly Canada (9%). The most common states of origin were California (10%), Florida (6%), Washington (6%), New York (6%), and Texas (5%).

Table 17. Passenger Origin

N 510	% of Total
Southern U.S.	28
Florida	6
Texas	5
Georgia	4
Virginia	2
Western U.S.	26
California	10
Washington	6
Arizona	2
Colorado	2
Midwestern U.S.	18
Michigan	3
Missouri	3
Illinois	3
Ohio	2
Eastern U.S.	13
New York	6
New Jersey	3
Massachusetts	2
International	14
Canada	9
Australia	2
United Kingdom	2

The average party size, defined as those the respondent was sharing expenses with, was 2.8 people. The most common party size was two people (61%).

Table 18. How many people are in your party today?

N 510	% of Total
One	9
Two	61
Three	8
Four	12
Five	3
6 or more	7
Average party size	2.8 people

*A party was defined as those sharing trip expenses.

Respondents were slightly more likely to be male than female (54% versus 46%), while the gender of all party members leaned toward female (53% versus 46%).

Table 19. Gender of Respondent and Party

N 502	% of Total	
	Respondent	Travel Party
Male	54	46
Female	46	53
Other	<1	1

Respondents reported an average age of 57 years old. The average age including all party members was 55 years old (this lower average among all party members reflects the inclusion of children).

Table 20. Age of Respondent and Party

N=482	% of Total	
	Respondent	Travel Party
<25	5	12
25-34	4	4
35-44	10	11
45-54	18	16
55-64	30	27
65-74	26	23
75+	8	6
Average age	57 years	55 years

Over half of respondents (59%) had achieved at least a Bachelor's degree, including 23% who achieved a Master's or PhD.

Table 21. Highest level of Education Completed

N 510	% of Total
Less than high school degree	1
High school graduate/GED	9
Vocational/Tech cert.	4
Some college	10
Associate degree	12
Bachelor's degree	36
Master's degree	17
PhD/Professional degree (doctor/lawyer/etc.)	6
Don't know	<1
Declined	<1

Respondents reported an average household income of \$139,000. Eighteen percent declined to respond to the question.

Table 22. Household Income

N 510	% of Total
Less than \$25,000	<1
\$25,000 to \$50,000	6
\$50,000 to \$75,000	8
\$75,000 to \$100,000	13
\$100,000 to \$125,000	13
\$125,000 to \$150,000	13
\$150,000 to \$200,000	12
More than \$200,000	17
Average income	\$139,000
Declined	18

Comparison with 2016 Survey

The last time Juneau cruise passengers were surveyed about their visit was in summer 2016 as part of the statewide visitor research project *Alaska Visitor Statistics Program*, conducted by MRG (then McDowell Group) for the Alaska Travel Industry Association. A total of 1,904 visitors who had traveled to Juneau via cruise ship were surveyed at various exit points around the state, primarily on the cruise ship docks in Ketchikan (the last port of call for many passengers) and in the Anchorage and Fairbanks airports for cross-gulf passengers flying home after their Alaska trip.

Because the AVSP survey was designed for statewide use, many questions are not comparable between the two surveys. For example, while 2016 visitors were asked about their activities in Juneau, they were not asked about specific Juneau attractions or satisfaction with their Juneau experience. Further, it is reasonable to suppose that the 2023 survey inspired better recall among passengers about their activities and spending in Juneau, since the 2016 survey was mostly conducted in other locations, days after the respondents' Juneau experience. With these caveats in mind, the following tables show comparable results for 2016 and 2023.

Cruise visitors in 2023 were less likely to report taking a day cruises than in 2016 (18% versus 31%) and more likely to report hiking (23% versus 14%). Tramway use went from 15% to 20%, while wildlife viewing went from 13% to 9%. Other changes were within 2%. (Because so much more detail was gathered in the 2023 survey, other activity categories are not comparable between the two years¹.)

Table 23. Comparing Visitor Survey Results: AVSP 2016 vs. CBJ 2023
ACTIVITIES (COMPARABLE RESULTS ONLY)

	2016	2023
Day cruises	31	18
Hiking	14	23
Tramway	15	20
Wildlife viewing	13	9
Salmon bake	8	10
Flightseeing (heli/floatplane)	6	7
Kayaking/canoeing	2	1
Gold panning/mine tour	2	2

¹ The source for all 2016 survey data in this chapter is the *Juneau Visitor Profile and Economic Impact Study, 2016*, prepared by MRG (then McDowell Group) for Travel Juneau.

In 2016, Juneau cruise passengers reported spending an average of \$162 per person in Juneau. Adjusting for inflation (+27% between 2016 and 2023) yields an adjusted total of \$206 per person. This compares to \$232 among 2023 passengers, for a 13% increase. The category showing the largest increase was gifts and souvenirs, up from \$67 (inflation-adjusted) to \$84. Tours/activities spending increased to a lesser extent, from \$121 (inflation-adjusted) to \$129.

**Table 24. Comparing Visitor Survey Results: AVSP 2016 vs. CBJ 2023
AVERAGE PER-PERSON SPENDING**

	2016	2016 Adjusted for inflation	2023
Tours and activities	\$95	\$121	\$129
Gifts and souvenirs	\$53	\$67	\$84
Food and beverage	\$12	\$15	\$17
Transportation	\$1	\$1	\$2
Other	\$1	\$1	\$0
Total	\$162	\$206	\$232

The percentage of 2016 visitors who reported having visited Alaska before (26%) was comparable to the percentage of 2023 visitors who reported having visited Juneau before (24%). Likewise, the percentage of 2016 visitors who reported having cruised to Alaska before (20%) was similar to the percentage of 2023 visitors who reported having cruised to Juneau before (22%).

**Table 25. Comparing Visitor Survey Results: AVSP 2016 vs. CBJ 2023
PREVIOUS JUNEAU/ALASKA TRAVEL**

	2016 Alaska	2023 Juneau
Been to Alaska/Juneau before	26	24
Been to Alaska/Juneau on cruise	20	22

Passengers were demographically very similar between the two years. The largest shift in terms of origin was international visitors, falling from 10% to 5%. Average party size shifted up slightly, from 2.6 to 2.8 people. Average age (all party members) was similar at 57 years in 2016 and 55 years in 2023. Males represented 44% of all party members in 2016 and 46% in 2023.

Average income among passengers increased from \$117,000 to \$139,000. Adjusting the 2016 average by the 2016-2023 inflation rate of 27% yields an adjusted income of \$149,000 – implying a decrease in terms of real income (to \$139,000 in 2023). The percentage having at least a college degree went from 64% in 2016 to 59% in 2023.

Table 26. Comparing Visitor Survey Results: AVSP 2016 vs. CBJ 2023
DEMOGRAPHICS

	2016	2023
Origin		
West	30	26
South	24	28
Midwest	15	18
East	11	13
Canada	9	9
Int'l	10	5
Average party size	2.6 people	2.8 people
Average age (party)	57 years	55 years
Male/female/other (party)	44/56	46/53/1
Average income	\$117,000	\$139,000
College graduate	64%	59%

Appendix

Cruise Line Sampling and Weighting

The survey sample was designed to reflect the overall large and mid-size cruise market, adjusted to achieve minimum sample sizes. For example: Disney passengers represented only 2% of 2023 passengers, which would have resulted in only 10 surveys, based on 2% of 500 surveys. In order to have a minimal sample size of Disney passengers, their sample target was increased to 40 surveys, then weighted down for overall results. Similarly, Princess passengers represented 26% of all passengers; this would have resulted in 132 surveys – more than adequate to represent the line. Their sample target was decreased to 100 surveys then weighted up for overall results.

“Luxury mid-size” lines, representing vessels with between 300 and 1,000 berths, were treated as a whole, with one ship from each of six lines sampled once throughout the season.

Small cruise ships (with less than 250 berths) were not included in the survey sample. In 2023 these vessels brought roughly 8,000 passengers, or less than one-half of 1% of Juneau’s total passengers (1.65 million).² These passengers are more challenging to survey, as they often use Juneau as an embarkation/disembarkation port; they are more appropriately surveyed at the airport upon departure.

Table 27. Juneau Passenger Volume, by Cruise Line
Large and Mid-Size Vessel Lines

	% of Total Juneau Passengers	% of Survey Sample
Princess	26%	21%
Norwegian	21%	18%
Royal Caribbean	19%	11%
Holland America	16%	11%
Carnival	6%	9%
Celebrity	5%	9%
Disney	2%	7%
Luxury mid-size*	4%	14%

*These vessels have between 300 and 1,000 berths and include the lines Viking, Oceana, Regent, Silversea, Seabourn, and Windstar.

² Source: City and Borough of Juneau.

"Other" Responses to Open-Ended Questions

WHAT PAID TOURS DID YOU PARTICIPATE IN TODAY?

- City bus to glacier
- DIPAC
- Pedicab

DID YOU BOOK YOUR TOURS THROUGH YOUR CRUISE LINE, THROUGH A TRAVEL AGENT, AT A BOOTH ON THE DOCK, OR DIRECTLY WITH THE TOUR COMPANY?

- AAA
- Alaska Shore Tours

DID YOU PARTICIPATE IN ANY OTHER ACTIVITIES WHILE IN JUNEAU?

- Library (x2)
- Pedicab
- Rie Munoz Gallery (x2)

WHILE IN PORT, WHERE DID YOU GET INFORMATION ABOUT JUNEAU?

- Previous trip
- Private tour
- Travel agent (x2)
- Travel channel

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ECONOMIC IMPACT OF JUNEAU'S CRUISE INDUSTRY 2023

January 2024

PREPARED FOR:

City and Borough of Juneau

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Executive Summary


The City and Borough of Juneau (CBJ) contracted with McKinley Research Group to estimate the economic impacts of the cruise industry in 2023. Sources included surveys of passengers and crew members in summer 2023; local purchasing data provided by cruise lines; cruise-related revenues provided by the City and Borough of Juneau; and the U.S. Bureau of Economic Analysis, among other sources. Following are key findings of the study.

Cruise Ship, Passenger, and Crew Volume

 Cruise Ship Calls	700+
Cruise Passenger Volume	1,670,000
Crew Member Volume	36,000

Cruise ships made over **700** individual calls to Juneau in 2023, bringing nearly **1.7 million** passengers and **36,000** crew members. The 2023 passenger volume was up **74%** from a decade earlier and **28%** from the previous peak in 2019.

Cruise Industry Spending

 Cruise Line Spending	\$39 m
Cruise Passenger Spending	\$320 m
Crew Member Spending	\$16 m
Total Direct Spending	\$375 m

The cruise industry accounted for **\$375 million** in direct spending in Juneau in 2023, **\$320 million** of which is attributable to passenger spending; **\$39 million** to cruise line spending; and **\$16 million** to crew member spending. Spending was largely concentrated in the tour/activity (**\$152 million**) and retail (**\$144 million**) sectors.

Economic Impacts – Direct + Indirect

 Total Employment	3,850 jobs
Total Labor Income	\$196 m
Total Spending	\$490 m

Including direct and indirect impacts, Juneau's cruise industry was associated with **3,850** jobs, **\$196 million** in labor income, and total spending activity of **\$490 million** in 2023.

Municipal Revenues

 Payments to CBJ	\$22 m
Sales Tax Revenues	\$18 m

CBJ collected an estimated **\$22 million** in cruise-related fees such as moorage and CPV revenues in 2023. An estimated **\$18 million** in sales tax revenues resulted from cruise industry spending.

Introduction and Methodology

Juneau has long been the most popular cruise port in Alaska, welcoming nearly every ship that sails the state's waters. As the volume of cruise ships has grown over the years, the industry has become an important part of Juneau's economy, supporting a wide range of businesses: restaurants and bars, retail shops, tour companies, attractions, and transportation providers, for example. With the rebound of cruising after two seasons heavily impacted by the COVID-19 pandemic, there is interest in understanding the importance of the industry to Juneau's economy. The City and Borough of Juneau (CBJ) contracted with McKinley Research Group (MRG) to conduct this study of economic impacts of Juneau's cruise industry.

The analysis drew upon a range of sources and methods.

- **Passenger spending** is based on a survey of cruise passengers on Juneau's docks in summer 2023.¹ For purposes of economic analysis, passenger spending was adjusted to account for tour commissions accruing to cruise lines and travel agencies.
- **Crew spending** is based on a survey of crew members in Juneau and interviews with cruise industry executives.
- **Cruise line spending** is based on local purchasing data provided by five cruise lines, extrapolated to represent all lines. Spending data was adjusted to exclude payments to shore excursion providers, which is accounted for under passenger spending.
- **Economic impacts** were determined using the economic modeling tool IMPLAN, adjusted to reflect Juneau's unique economic characteristics.
- **Municipal revenues** included payments by cruise lines directly to CBJ for moorage and other cruise-related payments, and sales tax revenues based on estimated direct, taxable industry spending.

Additional sources included Cruise Line Agencies of Alaska (CLAA), Travel Juneau, U.S. Bureau of Economic Analysis, and interviews with cruise industry executives. Please see the Appendix for supplemental notes on study methodology.

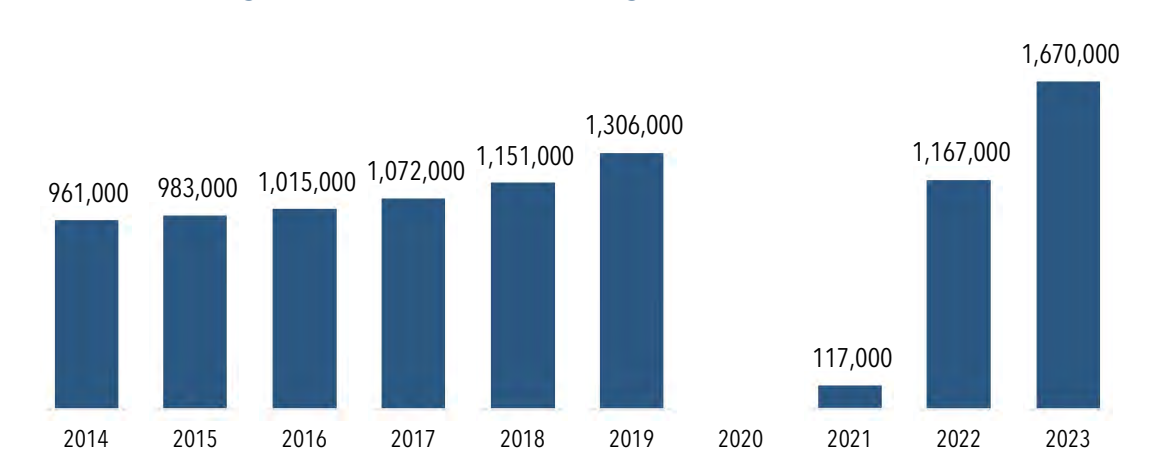
¹ *Juneau Cruise Passenger Survey 2023*, prepared by McKinley Research Group for the City and Borough of Juneau, December 2023.

Cruise Ship and Passenger Volume

Cruise Passenger and Crew Volume

Nearly 1.7 million cruise passengers visited Juneau between April and October 2023, up 74% (around 700,000 passengers) from a decade earlier, and up 28% from the previous peak in 2019. Approximately 36,000 crew members sailed to Juneau in 2023.

Figure 1. Juneau Cruise Passenger Volume, 2014-2023



Source: City and Borough of Juneau; Cruise Line Agencies of Alaska

Cruise Lines and Vessels

In 2023, 36 large or mid-size cruise ships from 13 cruise lines visited Juneau, representing over 700 port calls. Large ships each carry between 1,000 and 5,000 passengers and represented 98% of total volume in 2023. Mid-size ships carry between 250 and 1,000 passengers and represented 1%. Most mid-size and large ships spend between eight and 16 hours in Juneau.

Juneau is also visited by over a dozen small cruise ships, carrying fewer than 250 passengers. These passengers represented 1% of total passenger volume in 2023. Besides carrying fewer passengers, small ships differ in their itinerary: most use Juneau as an embarkation/ disembarkation port, with passengers often staying overnight in Juneau before and/or after their cruise, rather than just visiting for the day. One mid-size ship in 2023 also used Juneau as a turnaround port: the Seabourn Odyssey.

Figure 2. Juneau Cruise Ship Vessels and Passenger Capacity, Summer 2023, >250 berths

Cruise Line	Vessel	Passenger Capacity	Cruise Line	Vessel	Passenger Capacity
Carnival	Carnival Luminosa	2,826	Norwegian	Norwegian Sun	1,936
Carnival	Carnival Miracle	2,124	Oceania	Regatta	684
Carnival	Carnival Spirit	2,124	Princess	Ruby Princess	3,850
Celebrity	Celebrity Solstice	2,850	Princess	Majestic Princess	3,560
Celebrity	Eclipse	2,850	Princess	Royal Princess	3,560
Celebrity	Millenium	2,038	Princess	Crown Princess	3,080
Cunard	Queen Elizabeth	2,547	Princess	Discovery Princess	3,080
Disney	Disney Wonder	2,400	Princess	Sapphire Princess	2,670
Holland America	Koningsdam	2,650	Princess	Grand Princess	2,592
Holland America	Noordam	2,353	Regent	Seven Seas Explorer	738
Holland America	Nieuw Amsterdam	2,106	Royal Caribbean	Ovation of the Seas	4,905
Holland America	Eurodam	2,104	Royal Caribbean	Quantum of the seas	4,905
Holland America	Westerdam	1,916	Royal Caribbean	Brilliance of the Seas	2,400
Holland America	Volendam	1,432	Royal Caribbean	Radiance of the Seas	2,100
Norwegian	Norwegian Bliss	4,004	Seabourn	Seabourn Odyssey	450
Norwegian	Norwegian Encore	3,998	Silversea	Silver Muse	596
Norwegian	Norwegian Jewel	2,376	Silversea	Silver Whisper	382
Norwegian	Norwegian Spirit	2,018	Viking	Viking Orion	930

Source: Travel Juneau; CLAA

Cruise Industry Spending

Spending by Source

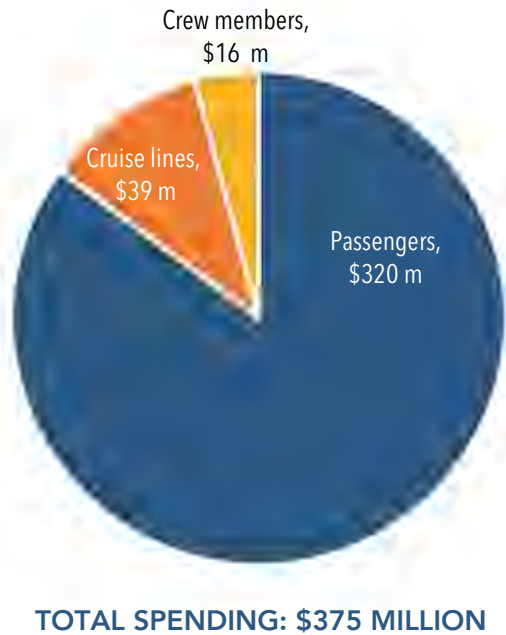
The cruise industry represented an estimated \$375 million in direct spending in Juneau in 2023. Cruise industry spending is comprised of three spending sources: passengers, cruise lines, and crew members.

Cruise passengers spent an estimated \$320 million in Juneau in summer 2023, representing 85% of all direct spending. Passenger spending includes purchases from retail shops, restaurants/bars, tour providers, attractions, transportation providers, and lodging providers.²

Cruise lines spent an estimated \$39 million in Juneau in summer 2023, representing 10% of all direct spending. Cruise lines pay dock operators; service providers such as equipment repair, security, and performing artists; and specialty foods/beverage providers such as breweries and smoked salmon retailers. They also make charitable donations to local non-profits. Payments to the State of Alaska for the Commercial Passenger Vessel Excise Tax that accrue to Juneau are included in this category. Payments to shore excursion providers on behalf of passengers are excluded as they are accounted for in the passenger spending category.

Crew members spent an estimated \$16 million in Juneau in summer 2023, representing 4% of all direct spending. Crew members primarily make purchases in the restaurant/bar and retail sectors, including larger box stores like Costco and Fred Meyer.

Figure 3. Cruise Industry Spending, by Source, 2023



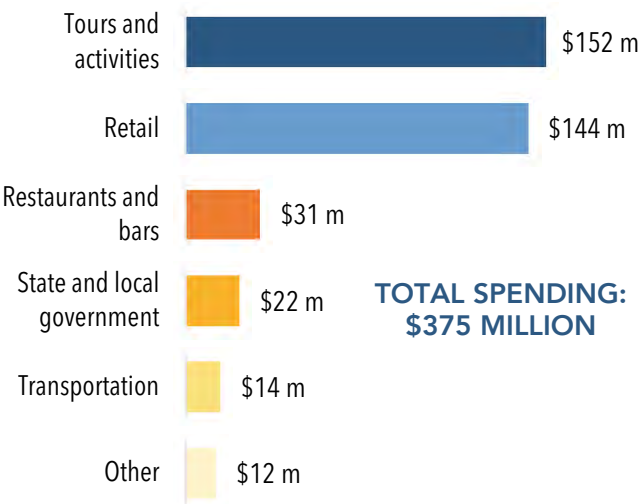
² Passengers off (mostly small) ships using Juneau as a turnaround port often spend nights in Juneau before and/or after their cruise.

Spending by Sector

Direct spending by the cruise industry is distributed throughout a range of sectors as seen in the chart at right. The two largest sectors are tours and activities, representing \$152 million and 41% of total spending, and retail, representing \$144 million and 38% of total spending.

Restaurants/bars represented \$31 million (8%); state and local government represented \$22 million (6%); and transportation represented \$14 million (4%). Other spending represented \$12 million (3%) and included spending on hotels by small ship passengers, cruise line spending on professional services, and utility payments, for example.

Figure 4. Cruise Industry Spending, by Sector, 2023



Cruise Industry Economic Impacts

Economic impacts are usually defined in terms of three categories: direct, indirect, and induced. As they apply to the cruise industry, these terms are defined as follows.

Direct Impacts: Jobs and labor income resulting from direct industry spending (detailed in the previous chapter); these jobs and wages primarily occur in the retail, food/beverage, attractions, tour, and transportation sectors.

Indirect Impacts: Jobs and labor income resulting from tourism businesses making local purchases; for example, when a whale watch operator purchases fuel, or a restaurant buys local produce.

Induced Impacts: Jobs and labor income resulting from employees of tourism businesses spending their wages in the local economy; for example, when a tour guide spends his earnings on clothing from a local retailer.

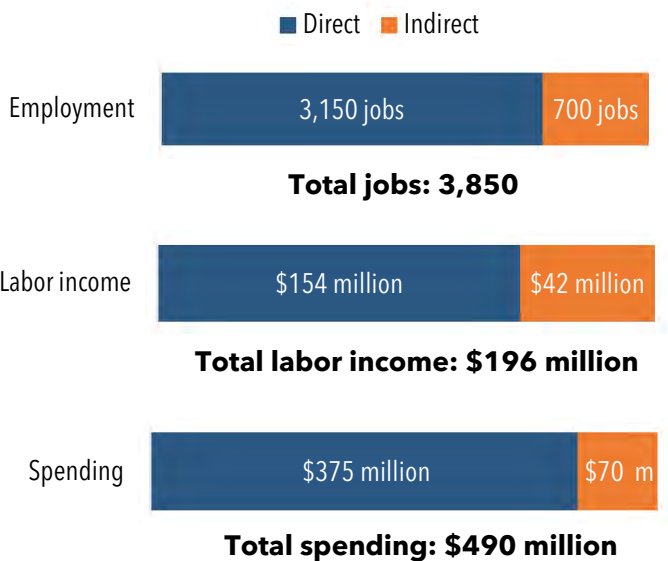
Note: For purposes of this analysis, “indirect” impacts collectively refers to both indirect and induced impacts.

Economic Impacts

Cruise industry spending in Juneau in 2023 created 3,150 direct jobs and 700 indirect jobs, for a total employment impact of 3,850 jobs. Direct labor income totaled \$154 million; combined with indirect labor income of \$42 million, the total labor income impact is estimated at \$196 million.

Adding together all direct and indirect spending associated with Juneau’s cruise industry results in a total spending estimate of \$490 million.

Figure 5. Economic Impacts of Juneau’s Cruise Industry, 2023



Municipal Revenues

Cruise-Related Payments to CBJ

The City and Borough of Juneau received over \$22 million in revenues associated with cruise ships in 2023. The largest components were the Marine Passenger Fees (\$8.2 million), Port Development Fees (\$4.9 million), and Port Maintenance Fees (\$1.4 million). Another large source of cruise-related revenue is the Commercial Passenger Vessel Excise Tax administered by the State of Alaska, a portion of which (\$5.7 million in 2023) accrues to Juneau.

Figure 6. Cruise-Related Payments to CBJ, 2023

	Revenues
Marine Passenger Fees	\$8,234,000
Commercial Passenger Vessel Tax Revenue (CPV)	\$5,680,000
Port Development Fees	\$4,917,000
Port Maintenance Fees	\$1,378,000
Large Cruise Ship Dockage Fees	\$950,000
Passenger For Hire Permits	\$457,000
Waterfront Sales Vendor Booth Permits	\$270,000
Potable Water Fees	\$126,000
Downtown Loading Zone Permits	\$118,000
Vessel Lightering Fees	\$103,000
Statter Harbor Loading Zone Permits	\$30,000
Small Cruise Ship Dockage Fees	\$21,000
Total	\$22,284,000

Source: City and Borough of Juneau; Alaska Department of Revenue.

Tax Revenues

Cruise industry spending generated an estimated \$17.7 million in sales tax revenues in 2023. Spending in the lodging sector, primarily attributable to passengers off small ships overnighing in Juneau before and/or after their cruise, resulted in an estimated \$600,000 in hotel/motel tax revenues to CBJ.

CBJ also receives property tax revenues from cruise industry-associated businesses. While this analysis is outside the scope of this study, a previous MRG study (conservatively) estimated tourism-industry associated property tax revenues at \$2.2 million in 2016.³

³ Juneau Visitor Profile and Economic Impact Study, 2016, prepared by MRG for Travel Juneau, October 2017.

The Cruise Industry's Role in Juneau's Economy

The U.S. Bureau of Economic Analysis estimated total Juneau employment at 23,000 in 2022, including self-employed and wage and salary workers. (As of the time of this report, 2023 employment had not been released.) Based on the estimate of 4,150 jobs resulting from the cruise industry in 2023, cruise-related employment represented 18% of Juneau employment. Cruise industry-related labor income represented 11% (\$208 million) of total labor income reported in 2022 (\$1.8 billion). Visitor industry employment typically represents a greater share than labor income due to lower-than-average wages in this sector. Note that total Juneau employment may have increased between 2022 and 2023, particularly considering that cruise traffic increased by 43%; these figures should be considered preliminary until total 2023 employment and labor income is released.

Appendix

Methodological Notes

Passenger volume: Passenger volume was based on the number of passengers reported by Cruise Line Agencies of Alaska (CLAA) as having called on Juneau, supplemented by passenger estimates for three small ship lines that do not report passenger volumes to CLAA: UnCruise, Alaskan Dream, and American Cruise Line. The total volume was adjusted downward before applying per-passenger spending averages to reflect the small fraction of passengers that stay on-board while in port.

Crew member spending: Crew member spending was based on an online survey of Juneau crew members conducted in August-September 2023. Signs with QR codes were posted at the Juneau Visitors Center, Marine Park shelter, E & M grocery store, onboard several Princess ships, and the downtown library. A total of 199 crew members participated representing seven different cruise lines. Cruise industry executives estimated the rate of disembarkation among crew members, as many crew members stay on-board while the ship is docked.

Small ships: Passengers off ships with fewer than 250 berths were not included in the 2023 dock survey due to their small number as well as the complexity in surveying passengers off ships on turnaround itineraries. However, small ships were included in the study's analysis of economic impacts. A 2019 study of Juneau's small ship market, conducted for the City and Borough of Juneau as part of a larger study of small ship infrastructure needs, included an estimate of the sector's economic impact and provided a basis for the 2023 analysis.⁴ Small ship passenger spending was based on a 2018 survey of Juneau airport passengers, adjusted for inflation and changes in passenger volume.

⁴ Juneau Small Cruise Ship Infrastructure Planning: Market Assessment and Economic Analysis, prepared by McKinley Research Group for PND Engineers and the City and Borough of Juneau, February 2020.

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