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Juneau by the Numbers

	2016		% Change from 2015
Employment and Wages			
Total Payroll (Millions)	\$911.9	↑	0.2%
Government (Millions)	\$422.3	↓	-0.2%
Service Sector (Millions)	\$344.9	↑	0.4%
Goods-Producing (Millions)	\$144.8	↑	1.2%
Average Wage	\$51,720	↑	1.9%
Average Monthly Employment	17,630	↓	-1.7%
Service Sector	9,193	↓	-0.7%
Goods-Producing	1,844	↑	0.1%
State of Alaska	3,837	↓	-6.3%
Local and Tribal	2,064	↑	1.1%
Federal Civilian	692	↓	-0.1%
Fishermen and Crew (Juneau Residents)	745	↓	5.1%
Unemployment	4.4%	↓	-6.4%
Demographics			
Population	32,739	↓	-1.6%
0 - 19 Year-Olds	8,050	↓	-1.7%
20 - 39 Year-Olds	9,222	↓	-2.8%
40 - 59 Year-Olds	9,322	↓	-2.7%
60 and Over	6,145	↑	3.9%
Median Age	38.0	↑	1.1%
Business Sales			
Gross Business Sales (Millions)	\$2,421	↑	7.3%
Tourist-Related Business Sales (Millions)	\$295	↑	8.4%
Construction and Housing			
New Housing Unit Permits	248	↑	96.8%
Median Price of Single Family Detached Home	\$379,050	↓	-1.5%
Transportation			
Cruise Passenger Arrivals	1,015,100	↑	3.3%
Air Passenger Arrivals	339,178	↑	2.7%
Ferry Passenger Arrivals	59,238	↓	-9.0%

Southeast Alaska by the Numbers

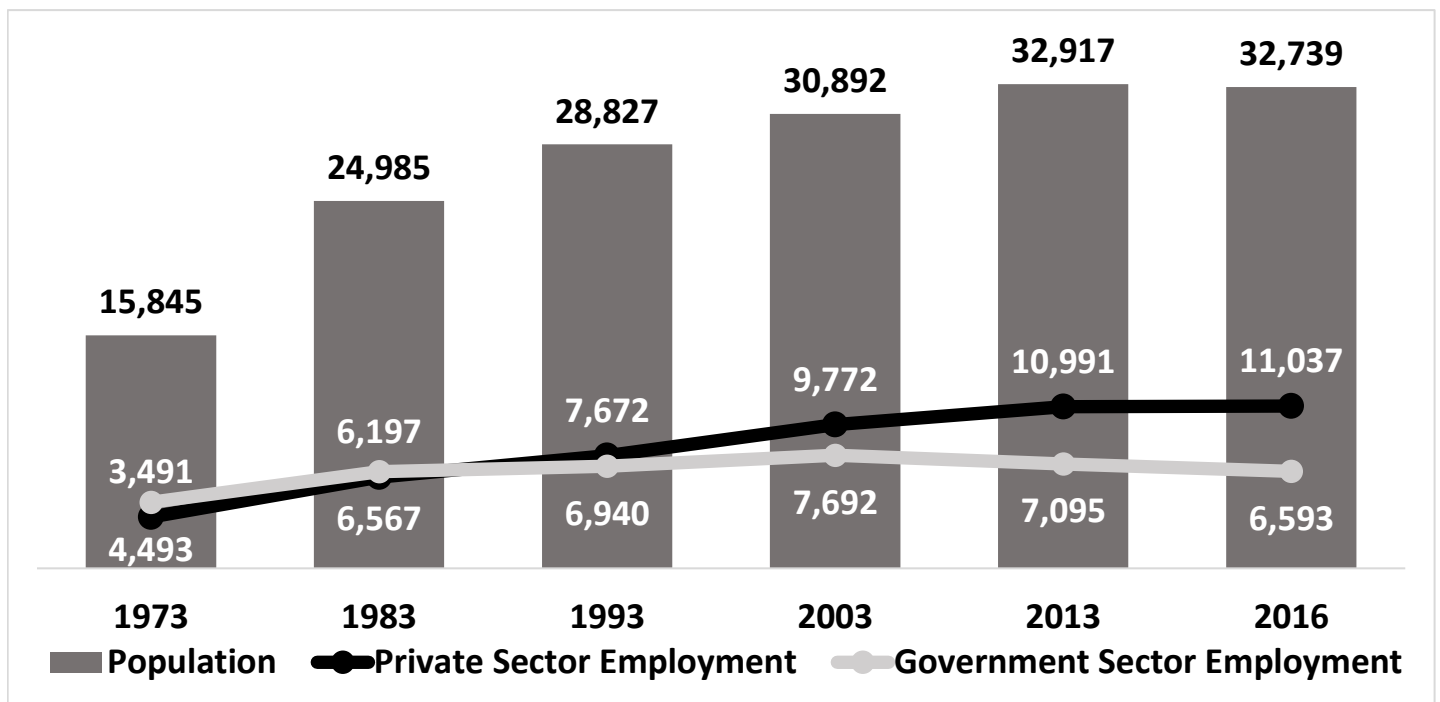
	2016		% Change from 2015
Employment and Wages			
Total Payroll (Millions)	\$1,713.5	↓	-0.7%
Government (Millions)	\$716.9	↓	-0.1%
Service Sector (Millions)	\$718.1	↑	1.7%
Goods-Producing (Millions)	\$278.5	↓	-7.8%
Average Wage	\$46,858	↑	1.7%
Average Monthly Employment	36,568	↓	-2.3%
Service Sector	19,614	-	0.0%
Goods-Producing	4,538	↓	-8.8%
State of Alaska	4,939	↓	-6.5%
Local and Tribal	6,005	↓	-1.4%
Federal Civilian	1,473	↑	0.1%
Fishermen and Crew (Southeast Residents)	4,822	↓	-0.8%
Unemployment	6.1%	↓	-6.2%
Demographics			
Population	73,812	↓	-0.8%
Without Juneau	41,073	↓	-0.1%
Median Age	40.0	↑	0.7%
Without Juneau	41.6	↑	0.5%
Construction and Housing			
New Housing Units Built	369	↑	87.3%
Without Juneau	128	↑	26.7%
Commercial Seafood Industry			
Pounds Landed by Resident Fisherman (Thousands)	154,567	↓	-22.3%
Ex Vessel Value for Resident Fisherman (Thousands)	\$157,979	↑	1.2%

Employment and Earnings

In the decades since 1973, Juneau’s population has more than doubled, from 15,845 to 32,739, growing at a compound growth rate of 1.8 percent. During this time, employment grew at a compound rate of 1.9 percent, slightly surpassing population growth.

A milestone was reached in 1985. Prior to that year, Juneau was a town dominated by government jobs. That year the private sector employment surpassed government employment. Both sectors continued to expand until 2003 when the government sector reached its all-time high average monthly employment of 7,692. Since then, government employment has been in decline while the private sector has continued to expand at just under 1 percent compound growth. This growth in the private sector occurred as a direct result of the need for services and retail goods for the growing population. The opening of two mines in the area and the explosion in number of cruise visitors to Alaska were additional significant contributors to private employment growth in the last decade.

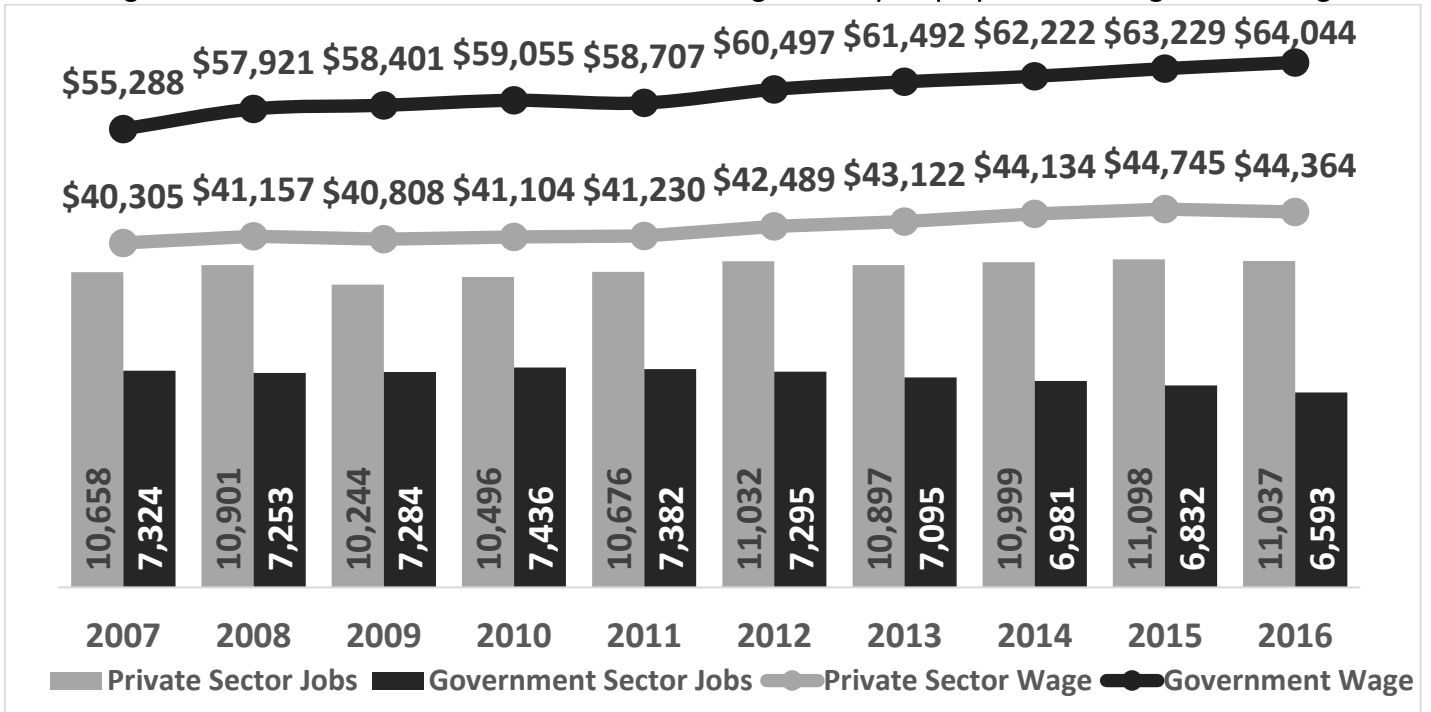
Figure 1: Juneau Population and Average Monthly Employment 1973 - 2016



Source: Alaska Department of Labor and Workforce Development

In 2016, Juneau’s average monthly employment declined by 300, from 17,930 in 2015 to 17,630. This decline was due to a loss of 239 government jobs combined with a loss of 61 private sector jobs. Despite the losses, total earnings in Juneau increased a slight 0.2 percent over last year. The average annual government wage continued to increase in 2016 inflation-adjusted dollars, while the average annual private sector wage was down slightly.

Figure 2: Juneau Private and Government Sector Avg. Monthly Employment and Avg. Annual Wage

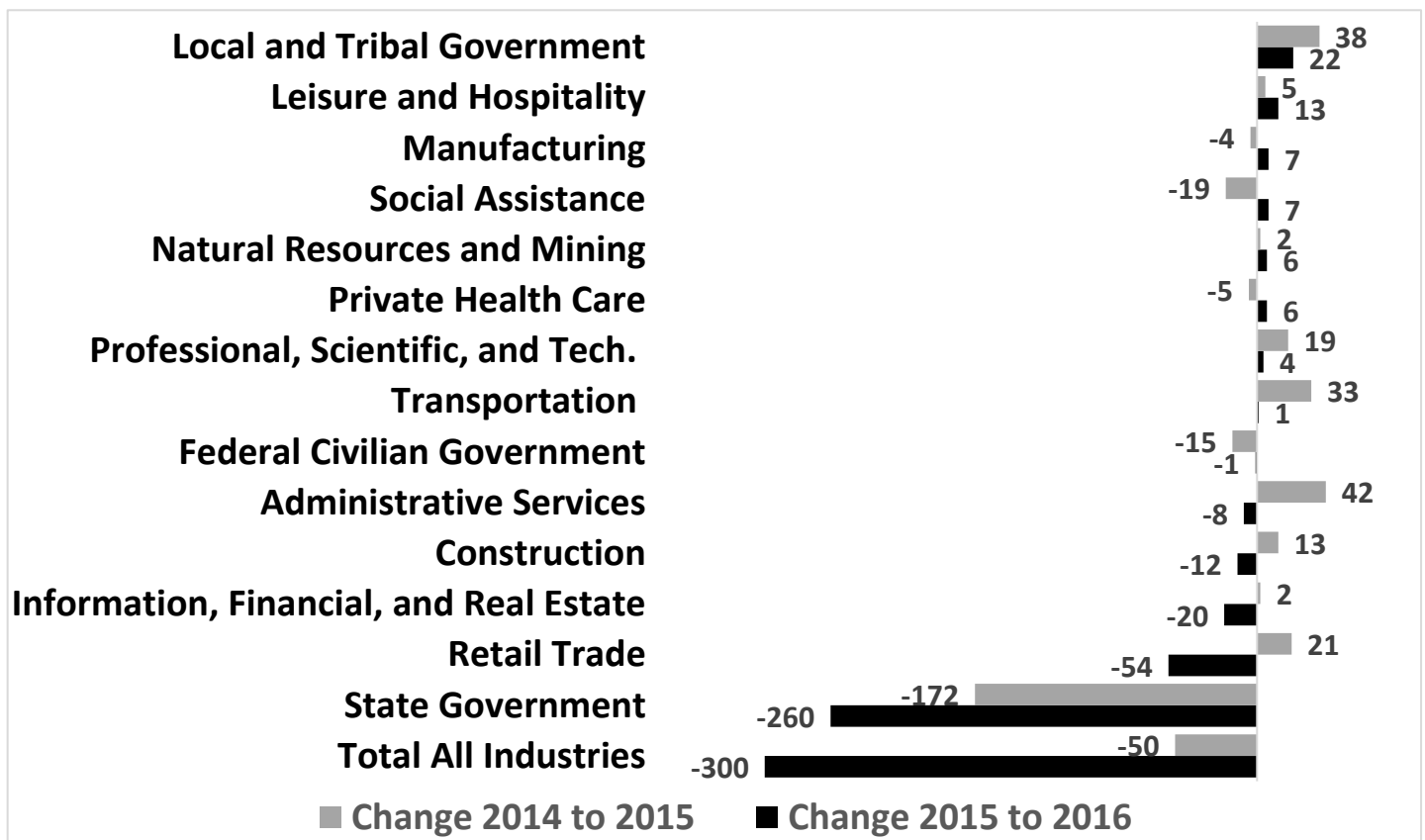


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Jobs count is for wage and salary jobs, including full and part-time, temporary or permanent, for all employers. Government sector employment is exclusive of active duty Coast Guard employment. Wages are inflation adjusted to 2016.

Industry Sector Employment and Earnings

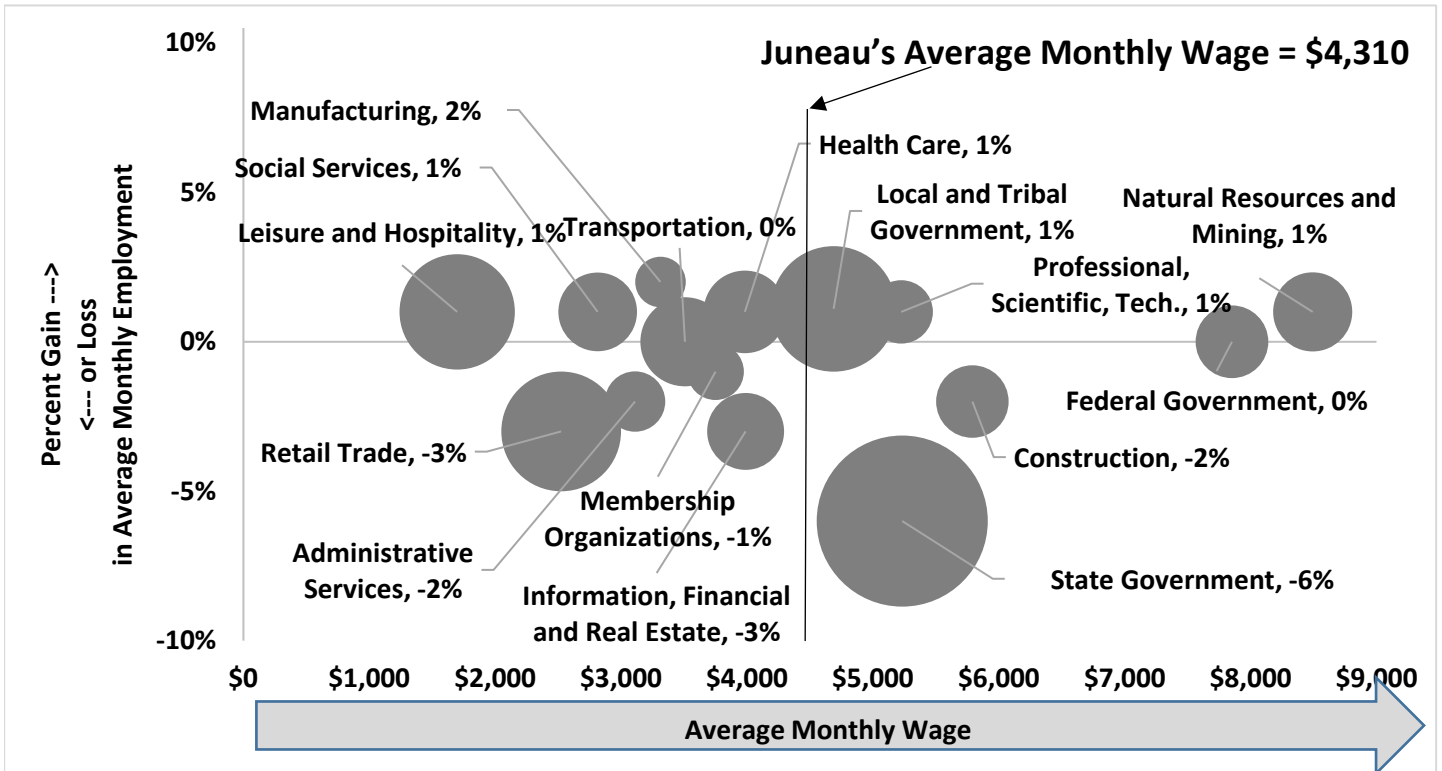
State government employment lost 260 jobs in 2016; federal jobs remained stable, and local and tribal employment increased by 22 jobs. All private industry sectors remained flat except for retail trade, which lost 54 jobs.

Figure 3: Change in Juneau Average Monthly Employment 2014 to 2015 and 2015 to 2016



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital. The Federal Civilian Government does not include the active duty Coast Guard personnel stationed in Juneau.

Figure 4: Percent Change in Average Monthly Employment 2015 – 2016 and Average Monthly Wage 2016



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital. The Federal Civilian Government does not include the Coast Guard personnel stationed in Juneau.

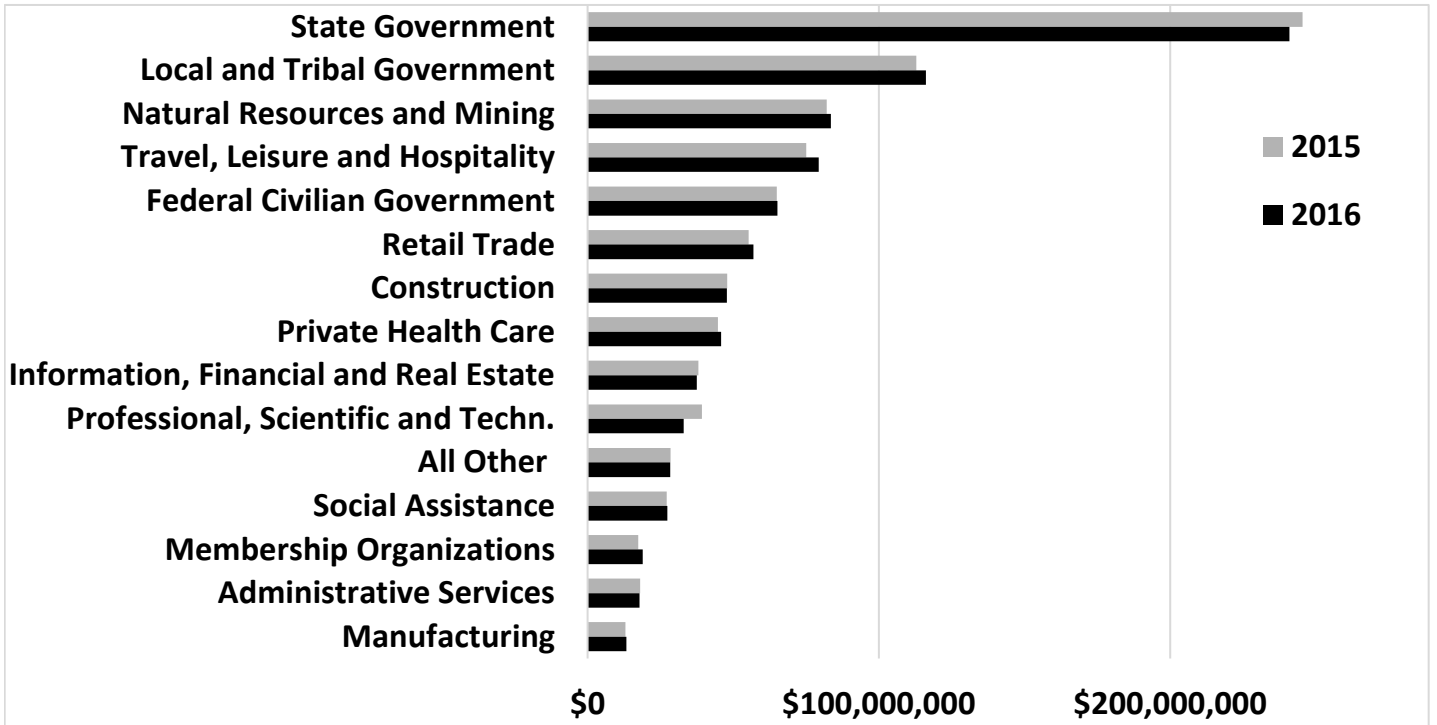
Juneau’s economy prospers when high paying jobs increase in the community. However, in 2016 Juneau continued to lose higher paying jobs while gaining lower paying jobs. In Figure 4, industry sectors which experienced job growth are represented by circles located in the top half of the chart, while sectors with job losses are circles in the bottom half of the chart. Those sectors paying above Juneau’s average salary or wages are located on the right side of the chart and sectors paying below average salary or wages are on the left. Those sectors which fall into the top right quadrant, Natural Resources and Mining and Professional, Scientific, and Technical are bright spots in the economy with above average pay and job growth in 2016. Those sectors in the bottom right quadrant, such as construction and state government, are cause for concern.

Here is how Figure 4 works:

- The size of the circle represents the number of jobs in each industry today. State government, with the largest circle, is the largest employer in Juneau. Local Government is the second largest employer and Retail Trade is the third.
- The horizontal axis lines up the circles from left to right by the average monthly wage in the industry. Mining jobs pay the highest wages in Juneau. The federal government pays the second highest. Leisure and hospitality, because of the many seasonal jobs, has the lowest average monthly wage, which is based on a 12-month average.
- The circle’s vertical position, either above the center line or below the center line, shows the percent expansion or contraction over the last year

for each industry. State government, at the bottom of the chart, contracted by 6 percent, losing 260 jobs.

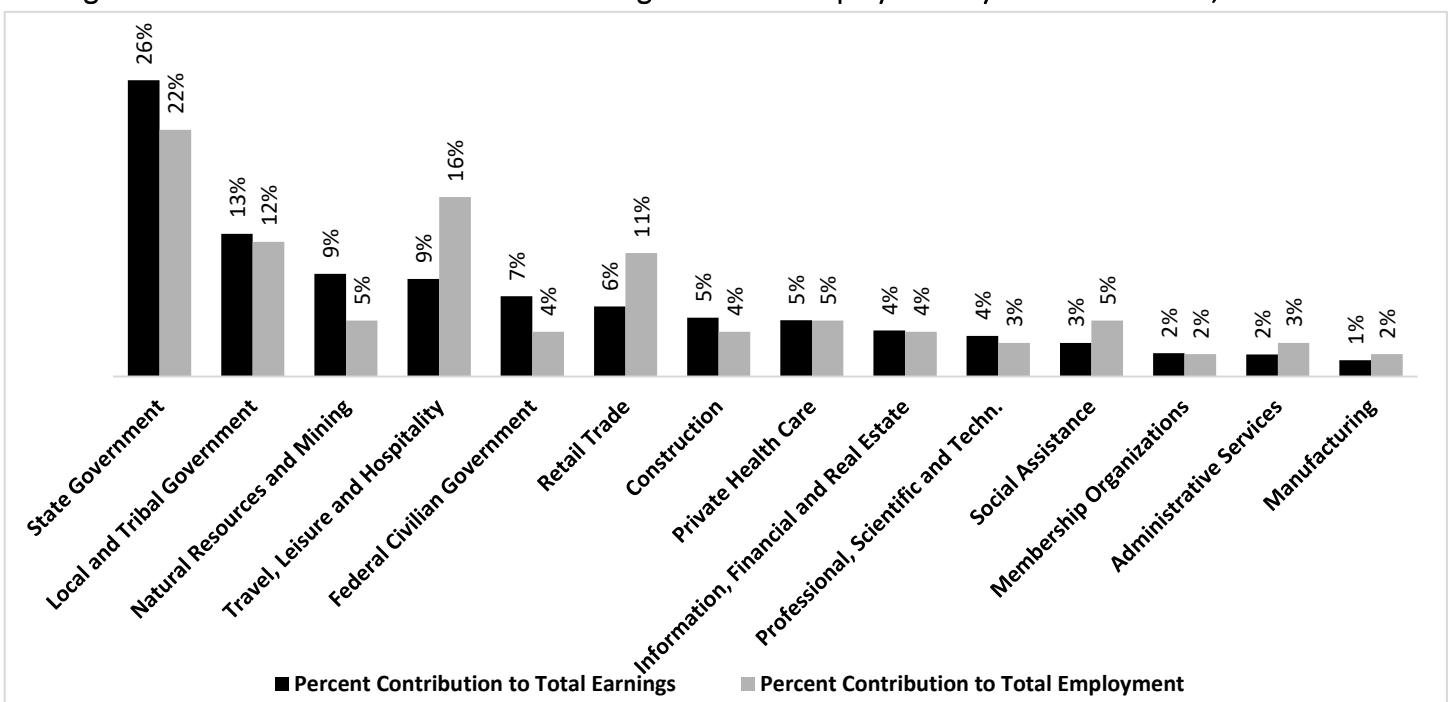
Figure 5: Juneau Total Wages Paid by Industry Sector



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital. The Federal Civilian Government does not include the Coast Guard personnel stationed in Juneau.

Figure 5 shows Juneau’s economic sectors arranged from highest to lowest total wages paid for 2015 and 2016. State government accounts for about 26 percent of all wages in the community. This sector, along with the professional, scientific and technical sector, had a slight decrease in total wages from 2015. All other sectors had an increase or stayed flat. Within the private sector, tourism, retail trade, and private health care are the largest employers. But while they account for almost one third of all jobs in the community, they pay only 20 percent of all wages.

Figure 6: Percent Contribution to Total Earnings and Total Employment by Economic Sector, Juneau 2016



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital. The Federal Civilian Government does not include the Coast Guard personnel stationed in Juneau.

Figure 7: Average Monthly Employment and Total Earnings by Sector, Juneau 2015 – 2016

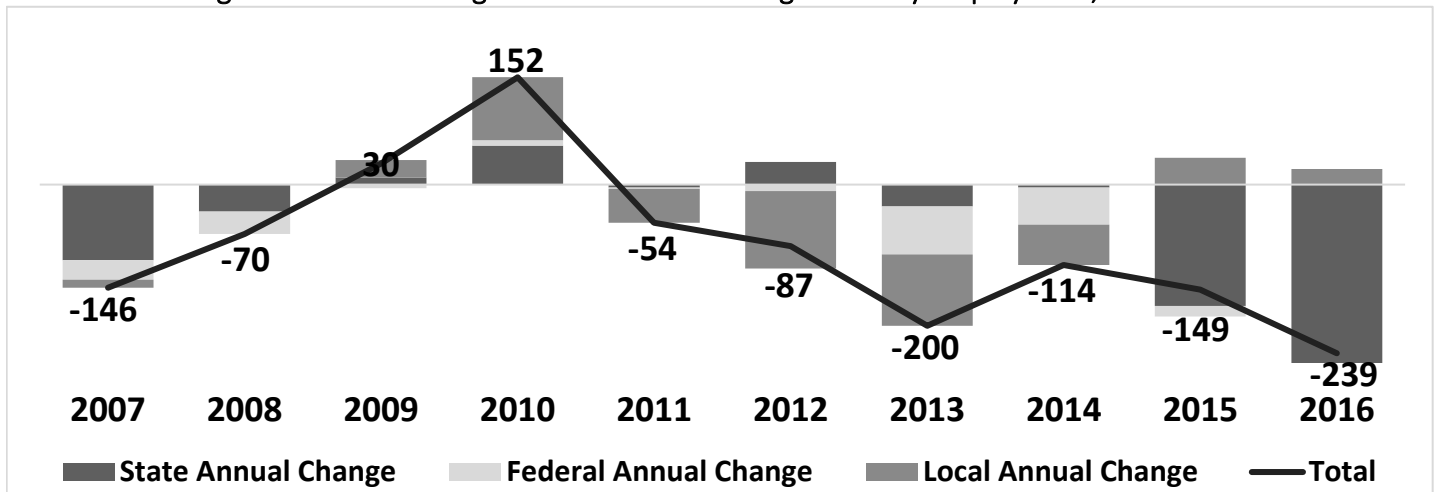
	Average Employment 2015	Average Employment 2016	% Change	Total Earnings 2015	Total Earnings 2016	% Change
Natural Resources and Mining	814	820	0.7%	\$82,119,693	\$83,569,703	1.8%
Construction	701	689	-1.7%	\$47,880,773	\$47,867,825	-0.0%
Manufacturing	328	335	2.1%	\$12,967,908	\$13,319,135	2.7%
Total Goods Producing	1,843	1,844	0.1%	\$142,968,373	\$144,756,663	1.3%
Retail Trade	1,932	1,878	-2.8%	\$55,292,988	\$56,885,571	2.9%
Leisure and Hospitality	1,731	1,744	0.8%	\$33,522,204	\$35,529,863	6.0%
Transportation	1,039	1,040	0.1%	\$41,546,260	\$43,765,070	5.3%
Private Health Care	888	894	0.7%	\$44,732,750	\$45,797,295	1.9%
Social Assistance	804	811	0.9%	\$27,199,721	\$27,382,966	0.7%
Information, Financial, and Real Estate	795	775	-2.5%	\$38,017,021	\$37,440,183	-1.5%
All Other Services	633	627	-0.9%	\$28,451,364	\$28,355,976	-0.3%
Professional, Scientific, and Tech.	522	526	0.8%	\$39,277,688	\$32,977,841	-16.0%
Membership Organizations	426	421	-1.2%	\$17,427,410	\$18,944,894	8.7%
Administrative Services	485	477	-1.6%	\$18,017,732	\$17,808,017	-1.2%
Total Service Providing	9,255	9,193	-0.7%	\$343,485,138	\$344,887,676	0.4%
Total Private Sector	11,098	11,037	-0.5%	\$486,453,511	\$489,644,338	0.7%
State Government	4,097	3,837	-6.3%	\$245,417,864	\$240,935,126	-1.8%
Local and Tribal Government	2,042	2,064	1.1%	\$112,839,757	\$116,119,506	2.9%
Federal Civilian Government	693	692	-0.1%	\$64,940,116	\$65,201,345	0.4%
Total Government	6,832	6,593	-3.5%	\$423,197,737	\$422,255,977	-0.2%
Total Industries	17,930	17,630	-1.7%	\$909,651,248	\$911,900,315	0.2%

Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital. The Federal Civilian Government does not include the uniformed Coast Guard personnel stationed in Juneau.

Government Employment

Juneau’s government sector lost jobs overall for the sixth year in a row because of continued state cutbacks. For the second year, local job gains mitigated state losses, and federal government employment stayed level.

Figure 8: Annual Change in Government Average Monthly Employment, 2007 - 2016

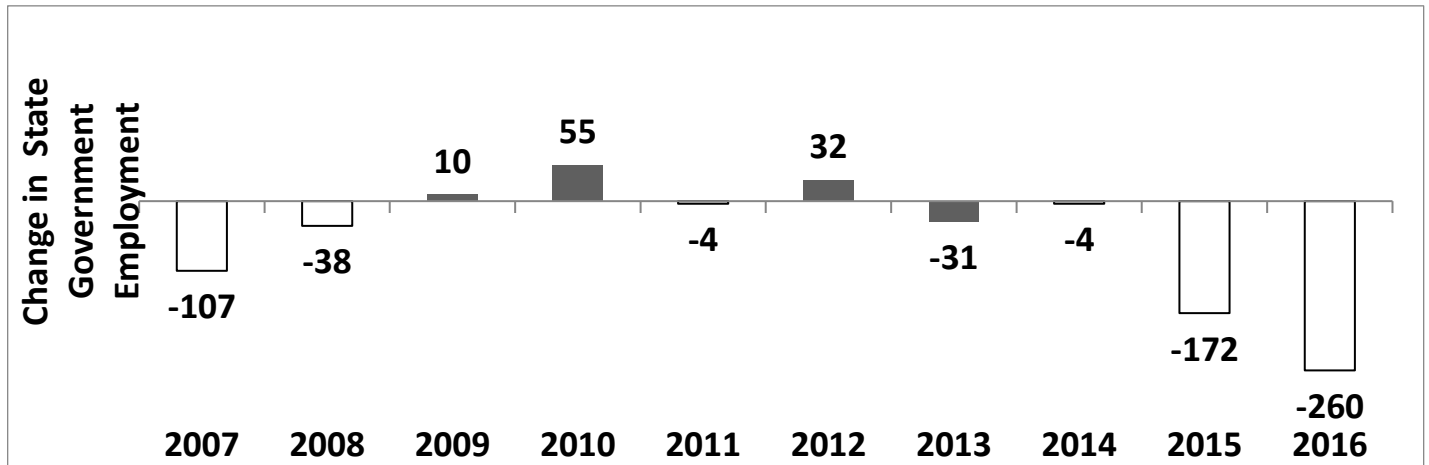


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages;

State Government Employment

Juneau’s state government average monthly employment dropped from 4,097 to 3,837, down by 260 workers from 2015 to 2016, the largest drop in more than a decade.

Figure 9: Change in Average Monthly State Government Employment in Juneau, 2007 – 2016



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Average annual state employment includes Juneau employees in the Executive branch, legislative branch, judicial branch and University of Alaska Southeast

A count of Executive Branch employees is taken on June 30 annually. The most recent count of 3,115, on June 30, 2017, is 132 employees below June 30, 2016. From 2014, when state government jobs began to shrink, to 2017 there has been a 14 percent decrease in employment in the Executive Branch. Some departments, such as Administration and Education have gone down as much as 19 percent over that time.

Figure 10: Juneau Area Executive Branch Employee Count by Department on June 30, 2014 - 2017

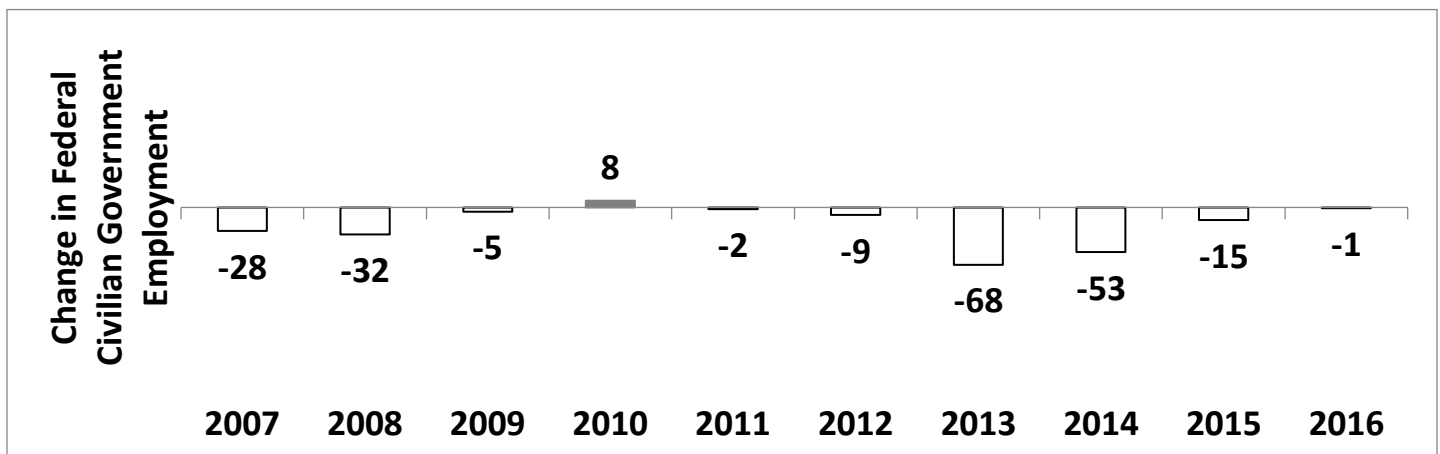
	June 2014	June 2015	June 2016	June 2017	Change 2016 to 2017	Percent Change 2014 to 2017
Transportation & Public Facilities	791	744	693	650	-43	-18%
Health & Social Services	561	557	517	485	-32	-14%
Administration	484	466	424	392	-32	-19%
Fish & Game	348	333	313	301	-12	-14%
Labor & Workforce Dev	272	252	237	232	-5	-15%
Education & Early Dev	245	231	215	199	-16	-19%
Revenue	204	200	188	194	6	-5%
Commerce, Community & Economic Dev	172	166	161	174	13	1%
Corrections	130	126	115	126	11	-3%
Environmental Conservation	143	132	129	117	-12	-18%
Office of the Governor	95	77	88	83	-5	-13%
Law	81	77	72	67	-5	-17%
Natural Resources	48	47	48	47	-1	-2%
Public Safety	46	46	44	42	-2	-9%
Military and Veterans Affairs	5	4	3	6	3	20%
Total Executive Branch	3625	3458	3247	3115	-132	-14%

Source: Alaska Department of Administration, Employee Planning and Information Center

Federal Government Employment

Juneau has lost 146 jobs in the federal government sector, a seventeen percent decline in employment, since federal cutbacks began in 2012. At that time, the National Oceanic and Atmospheric Administration (NOAA) was the second largest federal agency in Juneau after the Coast Guard, but NOAA has had the largest workforce reduction over this period, with a loss of 46 employees. The cuts represent a 20 percent reduction in staff from 2012 levels. For the first time, NOAA is now the third largest federal employer, behind the Forest Service by one employee. The Forest Service took a large reduction in 2013 but has since regained some jobs, currently down 11 employees from 2012.

Figure 11: Change in Average Monthly Federal Civilian Government Employment in Juneau, 2007 – 2016



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Figure 12: Average Annual Federal Government Civilian Employment in Juneau by Department, 2012 - 2016

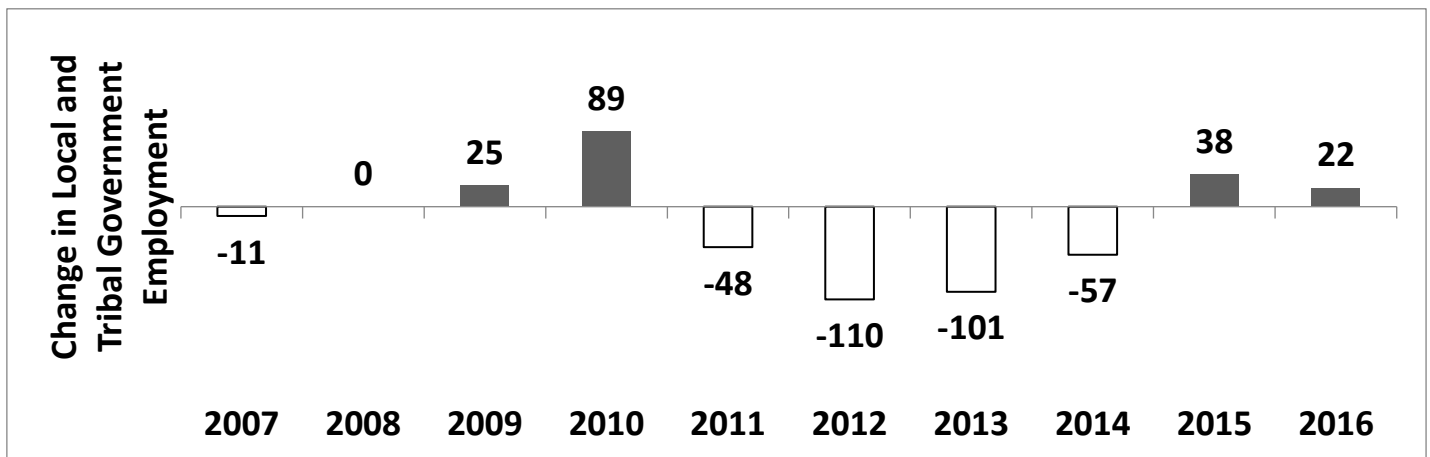
		2012	2013	2014	2015	2016	Change 2015 to 2016	Percent Change 2012 to 2016
Agriculture	Forest Service	192	173	175	177	181	4	-5.7%
Commerce	NOAA	226	200	192	186	180	-6	-20.4%
Transportation	*US Coast Guard	79	83	77	73	76	3	-3.8%
Postal Service	US Postal Service	71	72	68	69	67	-2	-5.6%
Transportation	FAA	72	63	58	66	64	-2	-1.1%
Transportation	TSA	84	80	59	47	49	2	-41.7
Transportation	Federal Hwy Admin	13	14	13	11	13	2	0.0%
Interior	Indian Affairs	21	16	10	9	11	2	-47.6%
Interior	Fish and Wildlife Service	16	14	10	8	7	-1	-56.3%
All Other		53	37	38	39	39	0	0.0%
Total		829	761	708	693	692	-1	-15.8%

Source: Alaska Department of Labor and Workforce Development, Research and Analysis; *Note: US Coast Guard employment does not include approximately 245 active duty personnel

Local and Tribal Government Employment

After contracting from 2011 to 2014, local and tribal government employment grew in 2016, for the second year in a row, to 2,064, helping to offset losses in state and federal employment.

Figure 13: Change in Monthly Average Local and Tribal Government Employment in Juneau, 2007 - 2016

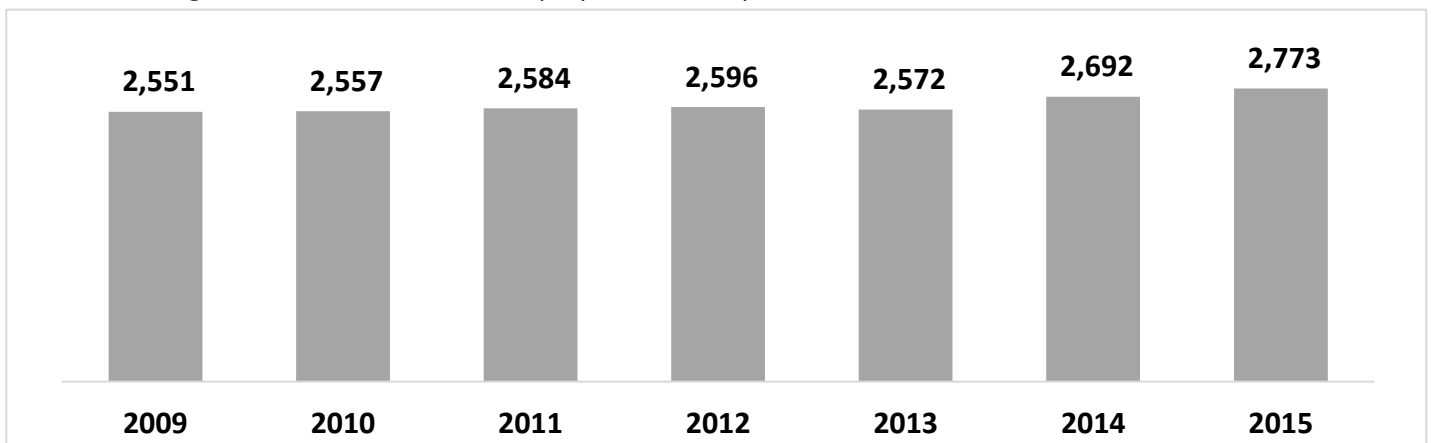


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Local Government includes such enterprises as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital

Self-employed/Sole Proprietors

There were 2,773 businesses in Juneau with no employees in 2015, the most recent year for which data is available, a 3 percent increase over the previous year. This is traditionally considered an estimate of the number of self-employed/sole proprietors and independent contractors in Juneau. Professional, scientific and technical services is the largest sector. Fishing is the second largest self-employed sector and real estate is the third.

Figure 14: Number of Self-employed and Independent Contractors, Juneau 2009 to 2015



Source: US Census Bureau, 2015 Non-employer Statistics

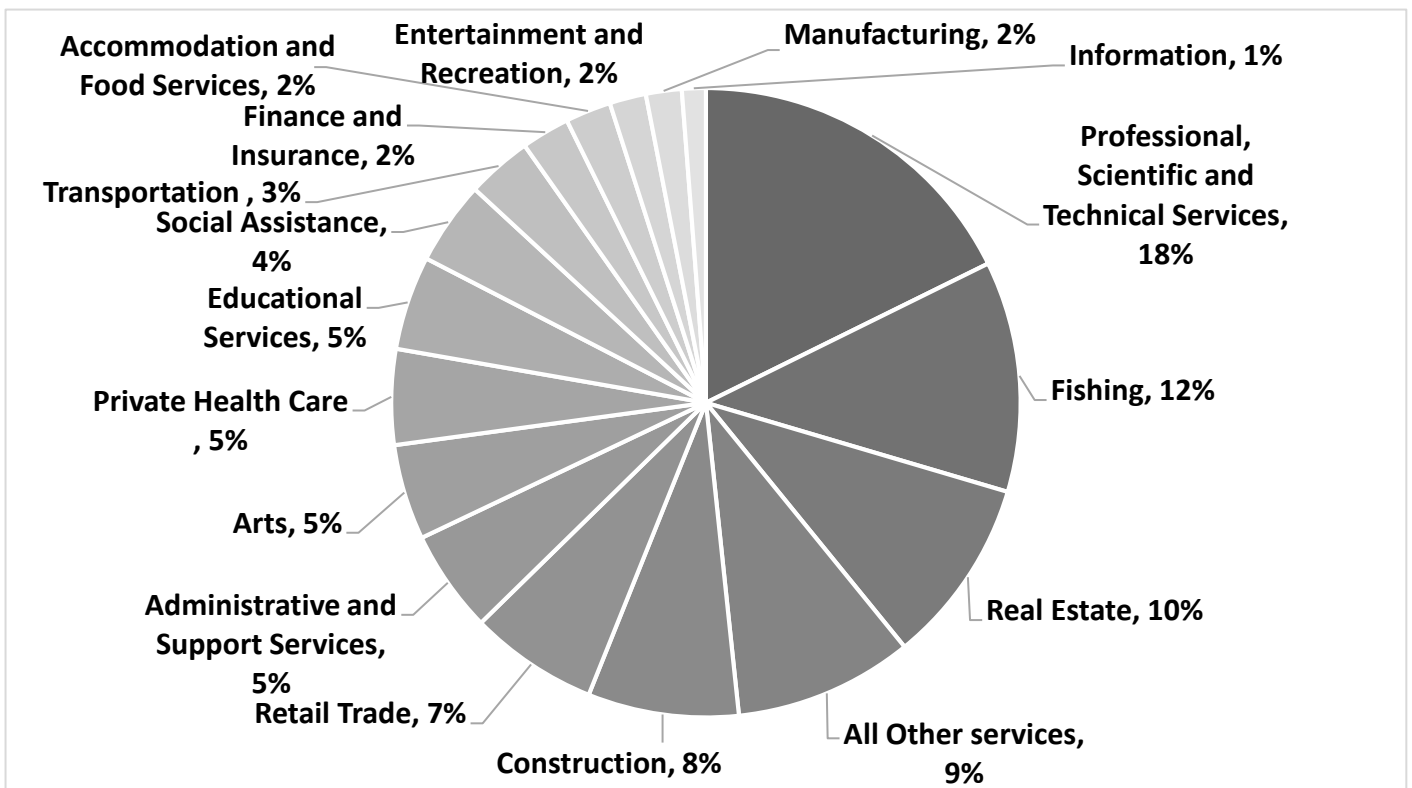
Figure 15: Self-Employed and Independent Contractors (Non-Employer Establishments) for Select Industry Sectors, Juneau 2015

	Number of Non-Employer Establishments	Receipts	Average Gross Revenue
Professional, scientific, and technical services	491	\$19,799,000	\$40,324
Fishing	329	\$16,736,000	\$50,869
Real Estate, rental, and leasing	265	\$33,943,000	\$128,087
Construction	215	\$15,761,000	\$73,307
Retail trade	183	\$6,396,000	\$34,951
Administrative and support services	146	\$4,730,000	\$32,397
Arts	136	\$1,862,000	\$25,149
Private health care	136	\$8,416,000	\$61,882
Educational services	134	\$1,931,000	\$14,410

	Number of Non-Employer Establishments	Receipts	Average Gross Revenue
Social Assistance	119	\$1,907,000	\$16,025
Transportation	93	\$5,522,000	\$59,376
Finance and insurance	69	\$1,870,000	\$27,101
Accommodation and food services	65	\$2,922,000	\$44,954
Entertainment, and recreation	52	\$1,488,000	\$28,615
Manufacturing	51	\$2,037,000	\$39,941
Total for all sectors	2,773	\$136,739,000	\$49,310

Source: US Census Bureau, 2015 Non-employer Statistics

Figure 16: Distribution of Juneau’s Self-Employed and Independent Contractors by Percent of Total, 2015



Source: US Census Bureau, 2015 Non-employer Statistics

Juneau’s Total Employment Picture: Wage, Salary, Self-Employed and Active Duty

To get a complete picture of the diversity of Juneau’s workforce, the wage and salary, military and self-employed job count has been combined in Figure 18. State government, while 22 percent of wage and salary jobs, is 19 percent of total Juneau employment. Four industry sectors account for half of all Juneau’s jobs: state government (19 percent), travel and hospitality (12 percent), local and tribal government (10 percent), and retail trade (10 percent).

Figure 17: Where Juneau Works: Total Wage and Salary, Military, and Self-Employed Jobs

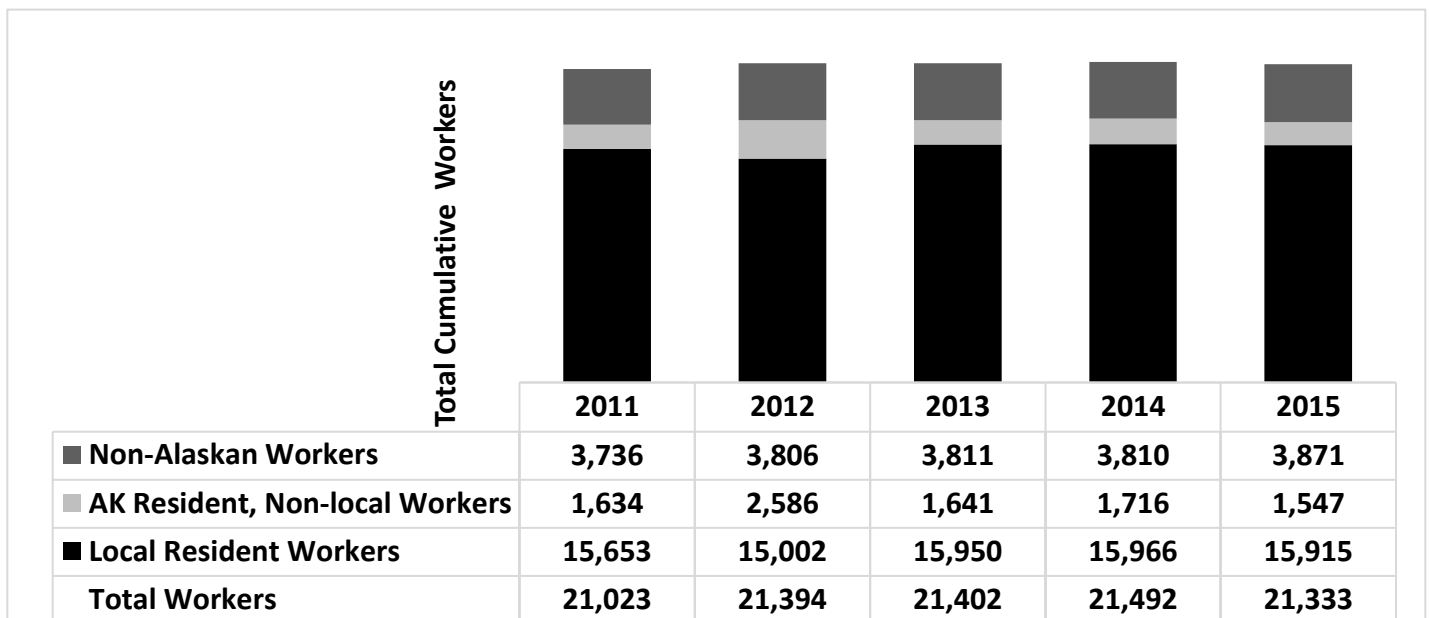


Source: Alaska Department of Labor and Workforce Development, 2016 Quarterly Census of Employment and Wages; US Census Bureau, 2015 Non-Employer Statistics

Non-resident Employment

In 2015 (the most current year for which data is available), Juneau’s total workforce was approximately 75 percent resident, 7 percent Alaskan but not local, and 18 percent out of state workers. However, non-resident workers are mostly employed in Juneau’s private sector, which is 32 percent non-local, while Juneau’s government sector is only 11 percent non-local. In Southeast Alaska, industries with high numbers of non-resident workers included manufacturing (69.0 percent), arts, entertainment, and recreation (50.2 percent), the mining industry (42.7 percent), and accommodation and food service (37.5 percent).

Figure 18: Worker Residency, Juneau 2011 -2015



Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, "Nonresidents Working in Alaska: 2015"

Figure 19: Resident and Non-Resident Workers and Earnings in Juneau, 2015

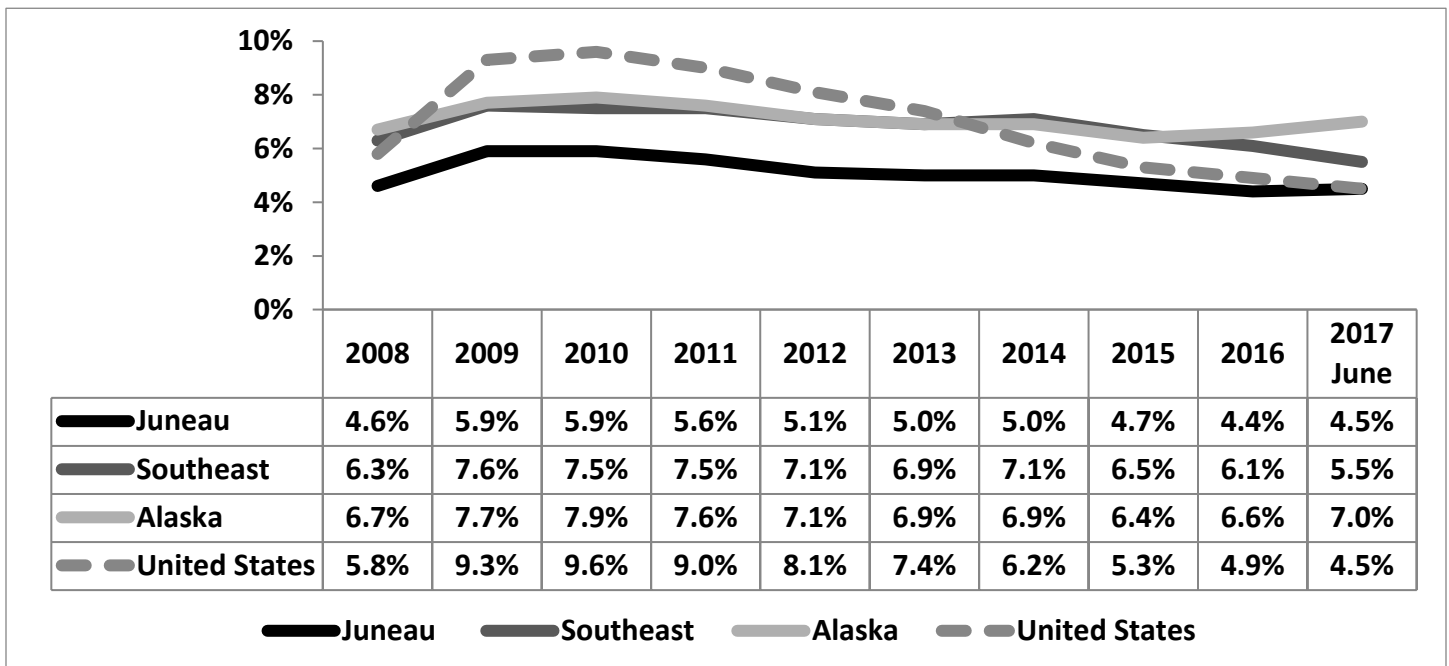
	Workers				Per Capita Average Annual Wages		
	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers	% Non-Juneau Resident	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers
State Government	3,913	352	188	12.1%	\$53,322	\$52,016	\$30,852
Local and Tribal Government	2,221	50	1,744	10.1%	\$47,462	\$31,558	\$26,675
Private Sector	9,781	1,145	3,509	32.2%	\$35,545	\$43,709	\$24,437
All Sectors	15,966	1,716	3,810	25.4%	\$41,576	\$45,206	\$24,849

Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, "Nonresidents Working in Alaska: 2015"

Unemployment

The unemployment rate in Juneau for June 2017 was 4.5 percent (not seasonally adjusted). One year ago, the comparative June 2016 unemployment rate was 4.4 percent. The fact that Juneau’s unemployment rate has tracked even with last year and is slightly below 2015, despite two years of state government job losses, may be because workers are retiring rather than looking for work, or because they are relocating out of the community. Juneau consistently has had lower unemployment than the rest of Southeast Alaska and the nation. Alaska’s unemployment rate is the highest in the country.

Figure 20: Average Annual Unemployment Rate 2008 -2016 and June 2017 (Not Seasonally Adjusted)

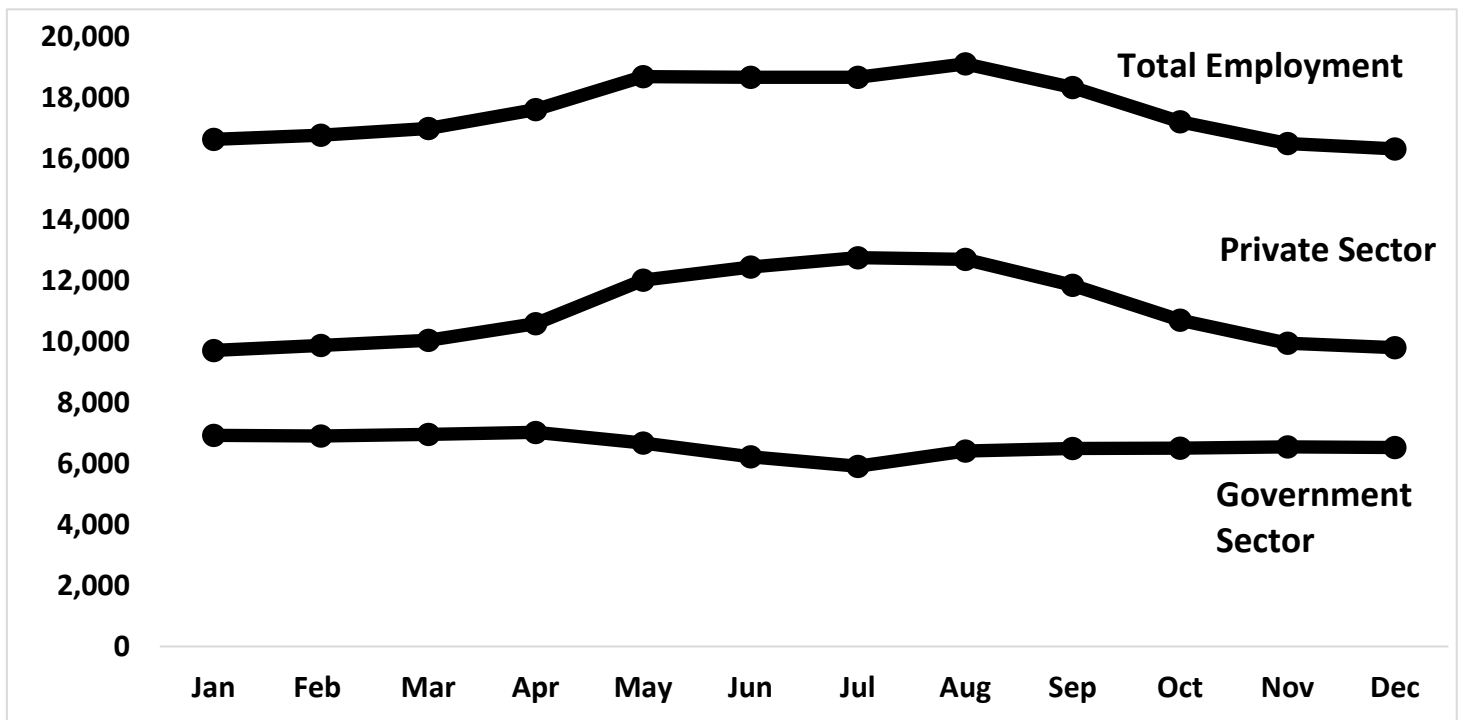


Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Employment and Employer Data

Seasonality of Employment

Juneau’s total employment has a pronounced seasonal variability. Government sector employment is down in the summer when the school district and the university are on summer break. Private sector employment increases in the summer with hiring for Juneau’s strong tourism sector. Peak employment is in August and the low is in December. In 2016, the difference between August and December employment was almost 2,800 jobs.

Figure 21: Juneau's Monthly Total Employment, Private Sector Employment and Government Sector Employment, 2016



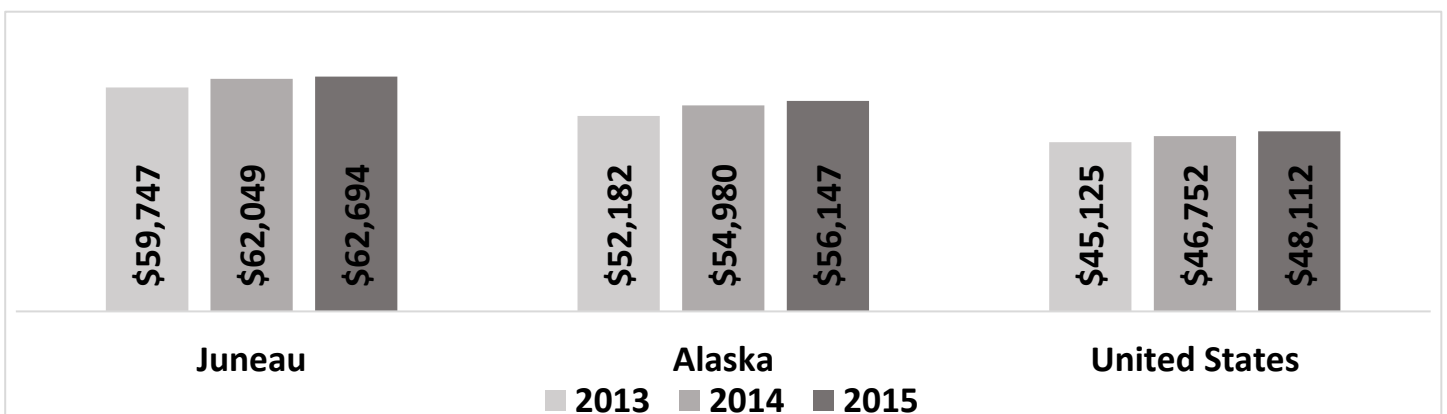
Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Employment and Employer Data

Per Capita Personal Income and Household Earnings

Per capita personal income is calculated as the total personal income of residents divided by the population. It is an indicator of the economic well-being of the community. In 2015, the most current year for which data is available, Juneau had a per capita personal income of \$62,694, an increase of 1.8 percent over 2014. Juneau's per capita personal income was 112 percent of the state average and 130 percent of the national average.

In Juneau, 74 percent of total personal income is income from employment, while in the United States the average is only 64 percent. Investment income, which includes dividends, rental income and interest, contributes 19 percent in Juneau, and transfer receipts, which include the permanent fund dividend, Medicare, Medicaid and social security, contributes the remaining 12 percent of total personal income. State-wide, income from employment is 67 percent of personal income, dividends, interest and rent contribute 17 percent and transfer payments contribute 16 percent.

Figure 22: Per Capita Personal Income Comparison, 2013 -2015 (In 2015 Inflation-adjusted Dollars)



Source: U.S. Bureau of Economic Analysis, Regional Data, Local Area Personal Income

Regionally, several communities enjoy a higher average per capita income than Juneau, the state and the nation.

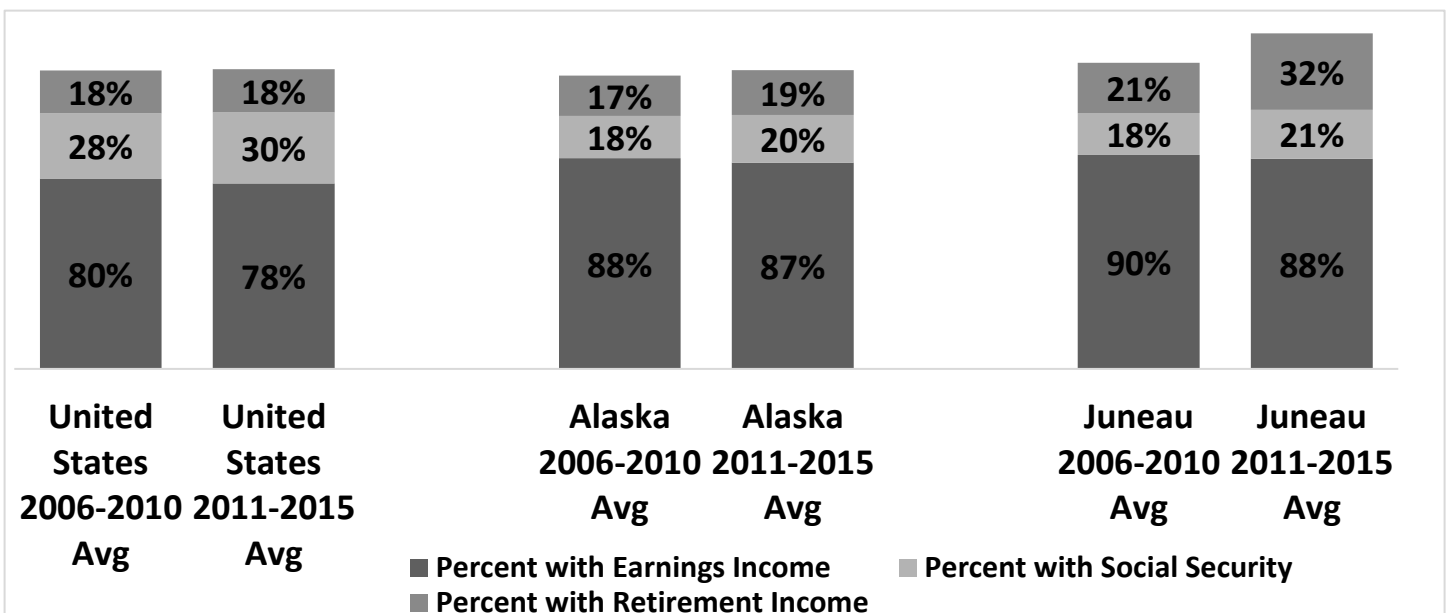
Figure 23: Per Capita Personal Income for Selected Boroughs, Alaska and U.S., 2012 - 2015 (In Nominal Dollars)

Area	2013	2014	2015	% Change 2014- 2015	Rank in State
Skagway Municipality	\$83,136	\$84,280	\$78,171	-7.2%	1
Petersburg Borough	\$62,867	\$63,866	\$66,323	3.8%	3
Sitka City and Borough	\$62,487	\$64,202	\$64,122	-0.1%	5
Ketchikan Gateway Borough	\$58,086	\$60,957	\$63,235	3.7%	7
Juneau City and Borough	\$58,869	\$61,600	\$62,694	1.8%	9
Yakutat City and Borough	\$62,187	\$62,483	\$60,333	-3.4%	10
Alaska	\$51,416	\$54,582	\$56,147	2.9%	--
Hoonah-Angoon Census Area	\$48,984	\$53,529	\$53,956	0.8%	14
United States	\$44,462	\$46,414	\$48,112	3.6%	--
Haines Borough	\$43,593	\$46,126	\$47,929	3.9%	21
Wrangell City and Borough	\$42,201	\$46,830	\$47,214	0.8%	22
Prince of Wales-Hyder Census Area	\$36,775	\$39,055	\$40,205	2.9%	26

Source: U.S. Bureau of Economic Analysis, Regional Data, Local Area Personal Income

According to the U.S. Census Bureau, from 2011 to 2015 (the latest years for which data is available) the average household income for the United States was \$75,558, the average household income for Alaska was \$89,746, and the average household income for Juneau was \$102,355. A significant contribution to this income in Juneau is retirement earnings.

Figure 24: Percent of Households with Earnings Income, Social Security Income and Retirement Income



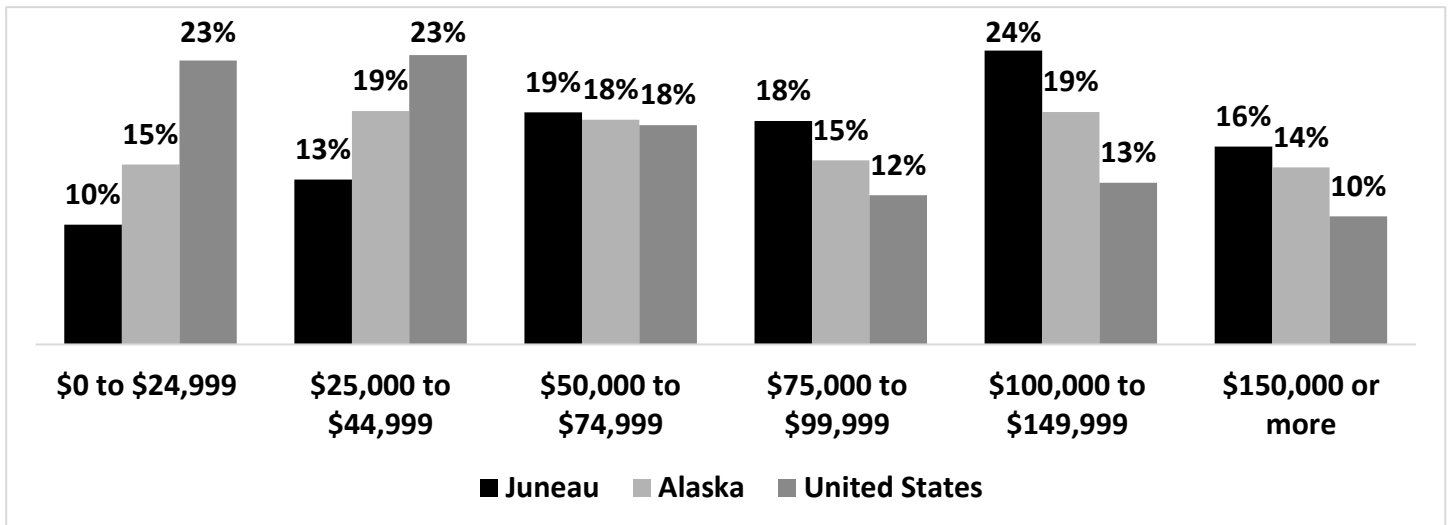
Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates DP03 Dataset, 2015 Inflation Adjusted Dollars

Income Distribution and Income Inequality

In the United States, 47 percent of all households earn less than \$50,000, compared to 34 percent in Alaska and only 23 percent in Juneau. In contrast, 58 percent of

Juneau households earn more than \$75,000 per year, while only 48 percent of all Alaska households and 36 percent of U.S. households are above this threshold.

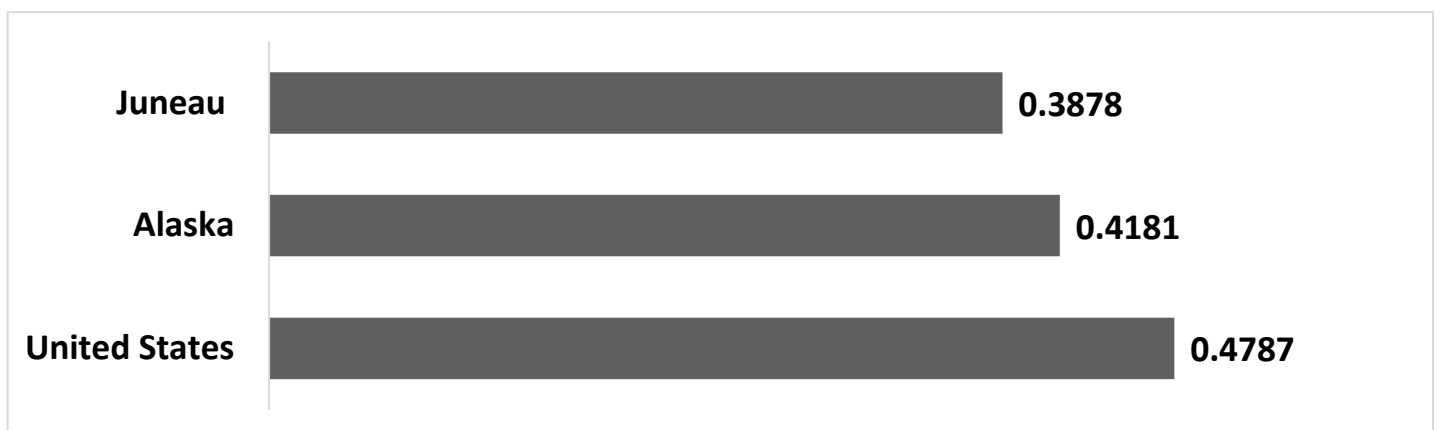
Figure 25: Percent of Households by Income Bracket, 2011 -2015, 5-Year Average



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates DP03 Dataset, 2015 Inflation Adjusted Dollars

Income inequality is measured by the distribution of wealth across a population. The most common way economists measure income inequality is using the Gini coefficient (or ratio), a number between 0 (perfect equality) and 1 (maximum inequality). Thus, the lower the Gini coefficient score the more fairly distributed the income. The Gini coefficient for household income in the United States is 0.4787, while that for Alaska is 0.4181, ranking Alaska second lowest in score among all states when ranked by Gini coefficient.¹ Juneau has a Gini coefficient of .3878. One reason for greater income equality in Juneau can be the predominance of government employment and other middle income positions.

Figure 26: Gini Index of Income Inequality, 2011 -2015, 5-Year Average



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates, B19083 Data Set

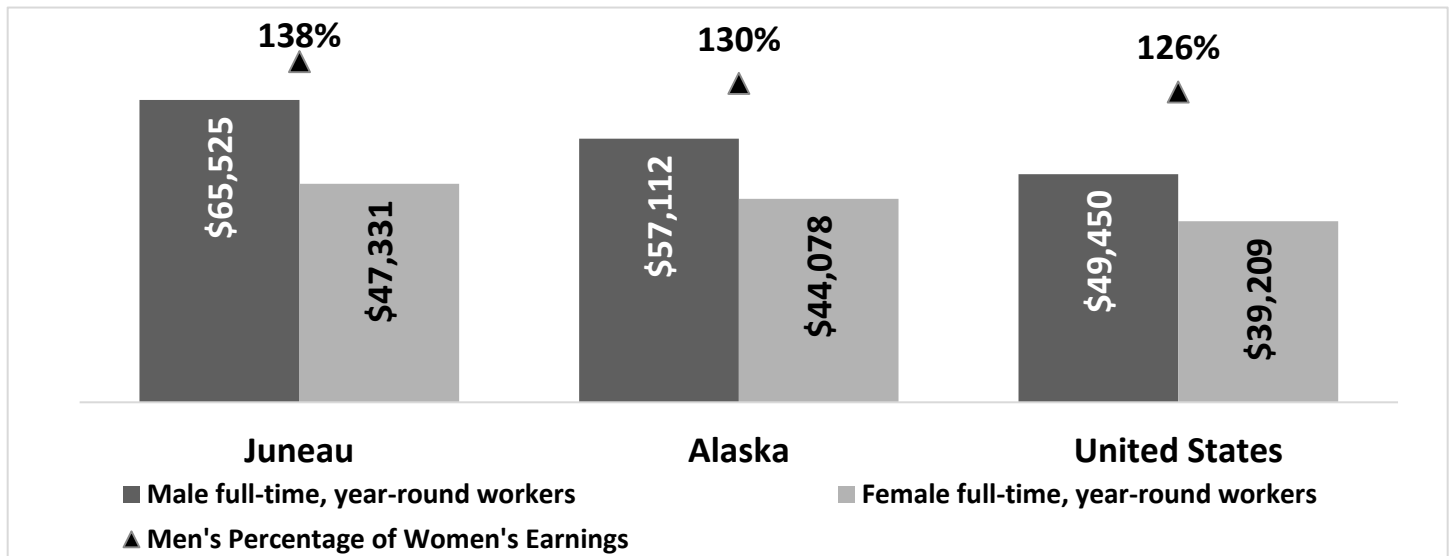
Gender Compensation

Women working in Juneau, on average, earn more than their counterparts in Alaska and the U.S. However, the median earnings for male full-time, year-round workers (\$65,525) in Juneau is 38 percent more than that for female full-time, year-round

¹ <http://www.worldatlas.com/articles/us-states-by-gini-coefficient.html>

workers (\$47,331), according to the census bureau’s 2011-2015 five-year estimate, the most current year for which data is available.

Figure 27: Median Earnings by Gender for Full-Time, Year-Round Workers, 2011-2015, 5-Year Average



Source: U.S. Census Bureau, DP03 dataset: Selected Economic Characteristics, 2011-2015 ACS 5-Year Estimate

One significant factor in this statistic is the difference in pay for the different types of jobs typically held by men and women in the workforce. Male-dominated industries in Alaska have higher wages and tend to be in extraction, construction and building trades. Female-dominated occupations tend to be lower wage and in service and care-providing sectors. As can be seen in Figure 28, Juneau’s mid-level office and administrative support jobs (mostly in government) have almost no gender bias.

Figure 28: Median Earnings by Gender for the Civilian Population 16 years and Over for Select Occupations

	Women's Earnings as a Percent of Men's Juneau	Women's Earnings as a Percent of Men's Alaska	Women's Earnings as a Percent of Men's United States
Health technologists and technicians	128%	82%	84%
Arts, design, entertainment, sports, and media occupations	118%	68%	74%
Legal occupations	103%	68%	52%
Office and administrative support occupations	99%	96%	94%
Computer and mathematical occupations	78%	100%	85%
Sales and related occupations	68%	56%	45%
Community and social service occupations	67%	90%	94%
Health diagnosing and treating practitioners and other technical occupations	51%	62%	60%
Architecture and engineering occupations	42%	68%	80%
Farming, fishing, and forestry occupations	34%	49%	62%
All Occupations	77%	68%	71%

Source: U.S. Census Bureau, B24012 dataset: Sex by Occupation and Median Earnings in the Past 12 Months (in 2015 inflation adjusted dollars) for the Civilian Employed Population 16 Years and Over, 2011-2015 ACS 5-Year Estimate

Southeast Alaska Employment and Wages

Regional wage and salary employment fell in 2016, largely a result of job losses in state government, down almost 7 percent, and in manufacturing, down almost 16 percent. Employment in tourism, which encompasses both the transportation and leisure and hospitality sectors, increased. Total wages paid in the private sector increased by over one percent despite the job losses, while earnings in the government sector remained flat overall.

Figure 29: Select Southeast Alaska Industry Sector Employment and Earnings, 2014 to 2016

	Average Employment 2014	Average Employment 2015	Average Employment 2016	Percent Change 2015 to 2016	Total Earnings 2014	Total Earnings 2015	Total Earnings 2016	Percent Change 2015 to 2016
Local and Tribal Government	5,988	6,088	6,005	-1.4%	\$281,839,970	\$287,173,644	\$293,591,285	2.2%
State Government	5,504	5,282	4,939	-6.5%	\$311,294,082	\$308,846,511	\$301,556,358	-2.4%
Federal Civilian Government	1,480	1,471	1,473	0.1%	\$120,063,983	\$121,292,002	\$121,773,417	0.4%
Total Government	12,972	12,841	12,417	-3.3%	\$713,198,035	\$717,312,157	\$716,921,060	-0.1%
Manufacturing	2,302	2,279	1,920	-15.8%	\$89,384,760	\$96,316,406	\$77,935,863	-19.1%
Construction	1,607	1,513	1,461	-3.4%	\$114,504,356	\$102,743,962	\$98,568,394	-4.1%
Natural Resources and Mining	1,184	1,185	1,158	-2.3%	\$100,498,958	\$102,980,934	\$101,998,336	-1.0%
Total Goods Producing	5,092	4,978	4,538	-8.8%	\$304,388,081	\$302,041,301	\$278,502,593	-7.8%
Retail Trade	4,174	4,247	4,214	-0.8%	\$117,262,850	\$120,699,409	\$122,929,305	1.8%
Leisure and Hospitality	3,929	4,067	4,174	2.6%	\$81,531,873	\$89,123,264	\$95,290,890	6.9%
Health Care and Social Services	3,717	3,662	3,683	0.6%	\$159,087,405	\$161,310,761	\$164,297,414	1.9%
Transportation	2,394	2,434	2,474	1.6%	\$103,190,794	\$106,027,827	\$110,589,530	4.3%
Financial Services	1,160	1,137	1,117	-1.8%	\$51,297,629	\$52,435,647	\$53,989,611	3.0%
Professional, Tech and Mgmt Services	876	936	938	0.2%	\$59,472,268	\$65,016,105	\$57,771,761	-11.1%
Administrative Services	686	734	731	-0.4%	\$23,858,792	\$25,522,655	\$25,376,411	-0.5%
Information	481	515	526	2.1%	\$20,179,224	\$22,536,036	\$22,313,713	-1.0%
Total Service Providing	19,337	19,621	19,614	0.0%	\$679,917,805	\$706,057,281	\$718,075,557	1.7%
Total Private Sector	24,429	24,599	24,151	-1.8%	\$984,305,886	\$1,008,098,582	\$996,578,150	-1.1%
Total	37,401	37,439	36,568	-2.3%	\$1,697,503,921	\$1,725,410,738	\$1,713,499,211	-0.7%

Source: Alaska Department of Labor and Workforce Development, Southeast Quarterly Census of Employment and Wages

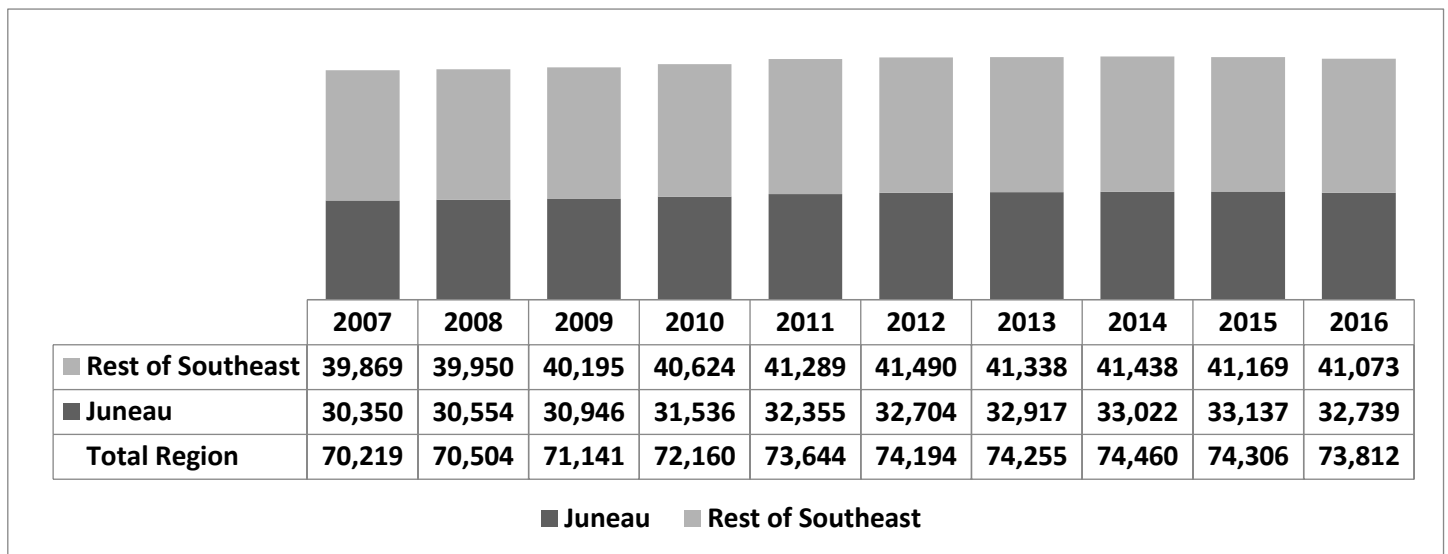
Demographics

Juneau Population Trends

In 2016, Juneau experienced its first population decline in ten years. The July 2016 population estimate was 32,739, a drop of almost 400 from 2015. This drop ended Juneau’s most recent growth spurt, from 2007 to 2015, during which time the population grew by just over 2,800 residents.

Over the past ten years, Juneau’s population grew at a compound annual growth rate of 0.1 percent, the Southeast region exclusive of Juneau grew at 0.3 percent, and the State of Alaska enjoyed a 0.8 percent compound annual growth rate in population.

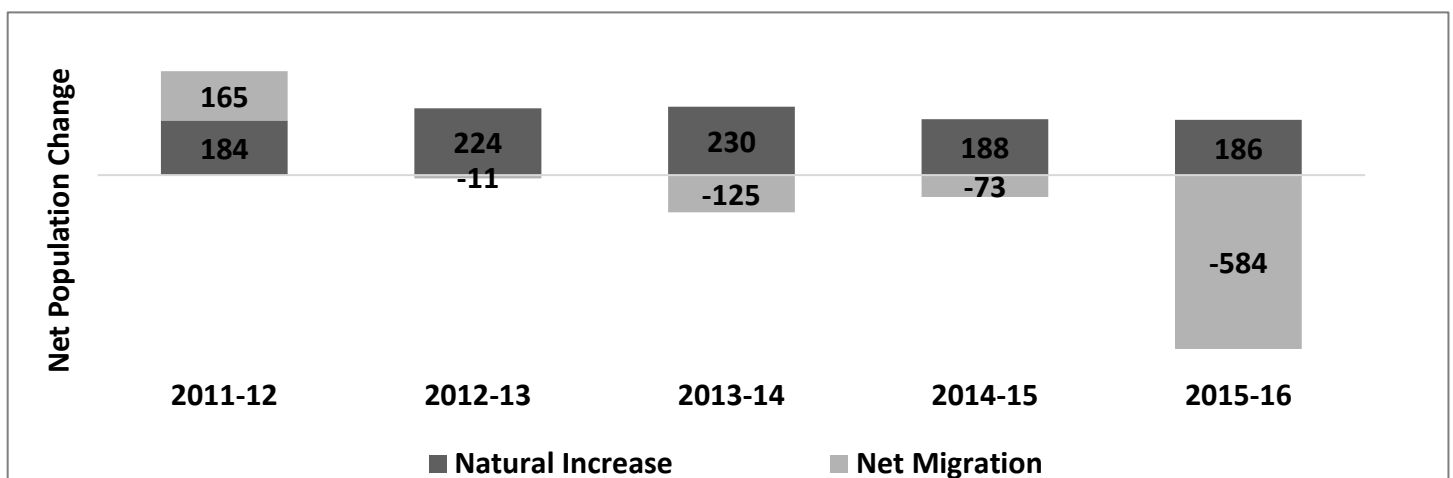
Figure 30: Juneau and Southeast Alaska Population, 2007 – 2016



Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates

Although Juneau experienced a small out-migration of population from 2013 to 2015, the natural increase (births over deaths) more than compensated for the decrease. In 2016 the net out-flow was greater than the natural increase, resulting in a population decrease of just under 400 people.

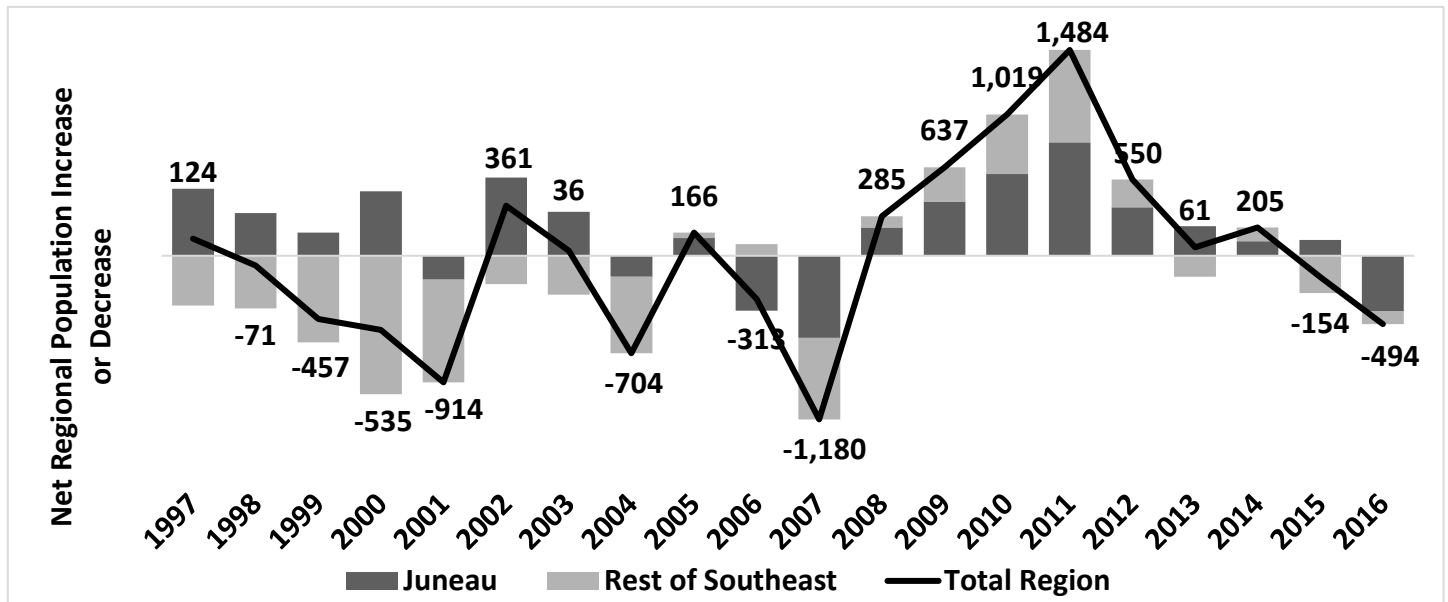
Figure 31: Annual Components of Population Change, Juneau 2011– 2016



Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates, Components of Change

Looking back two decades from 1997 to 2016, Juneau had 15 years with population growth and only five years with a decline. Three of those years were between 2004 and 2007. In contrast, Southeast Alaska, excluding Juneau, lost population in 11 out of 20 years. The five years from 2008 to 2012, when the lower 48 was in recession, were the only consecutive years where both Juneau and the region outside Juneau gained population.

Figure 32: Juneau and Southeast Alaska Yearly Population Change, 1997 – 2016

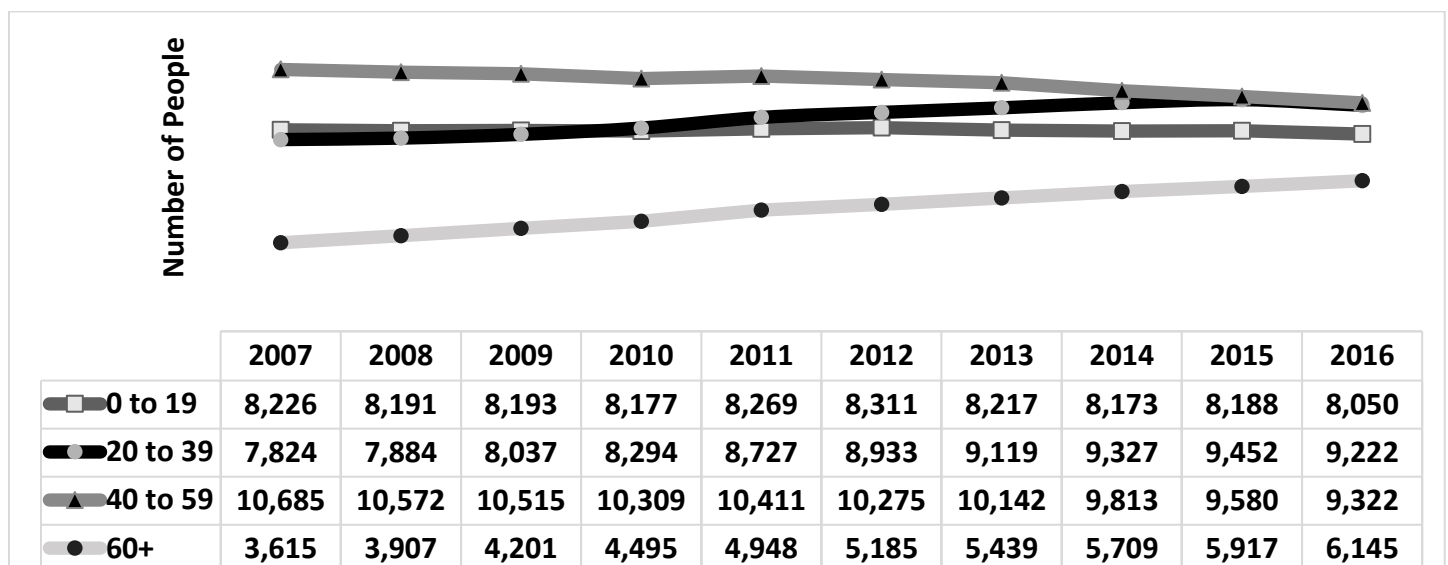


Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates

Juneau Population by Age Group

From 2015 to 2016, the number of Juneau residents age 60 and over continued to increase, up 3.9 percent from the prior year, while the number of residents of all other age groups decreased. However, over the past decade, Juneau has experienced growth in both the number of senior residents and in young adults, ages 20 to 39. Juneau has lost residents ages 40 to 59 steadily since a peak in 2005. The number of residents ages 0 to 19 has also been declining.

Figure 33: Juneau Population by Age Group, 2007 – 2016

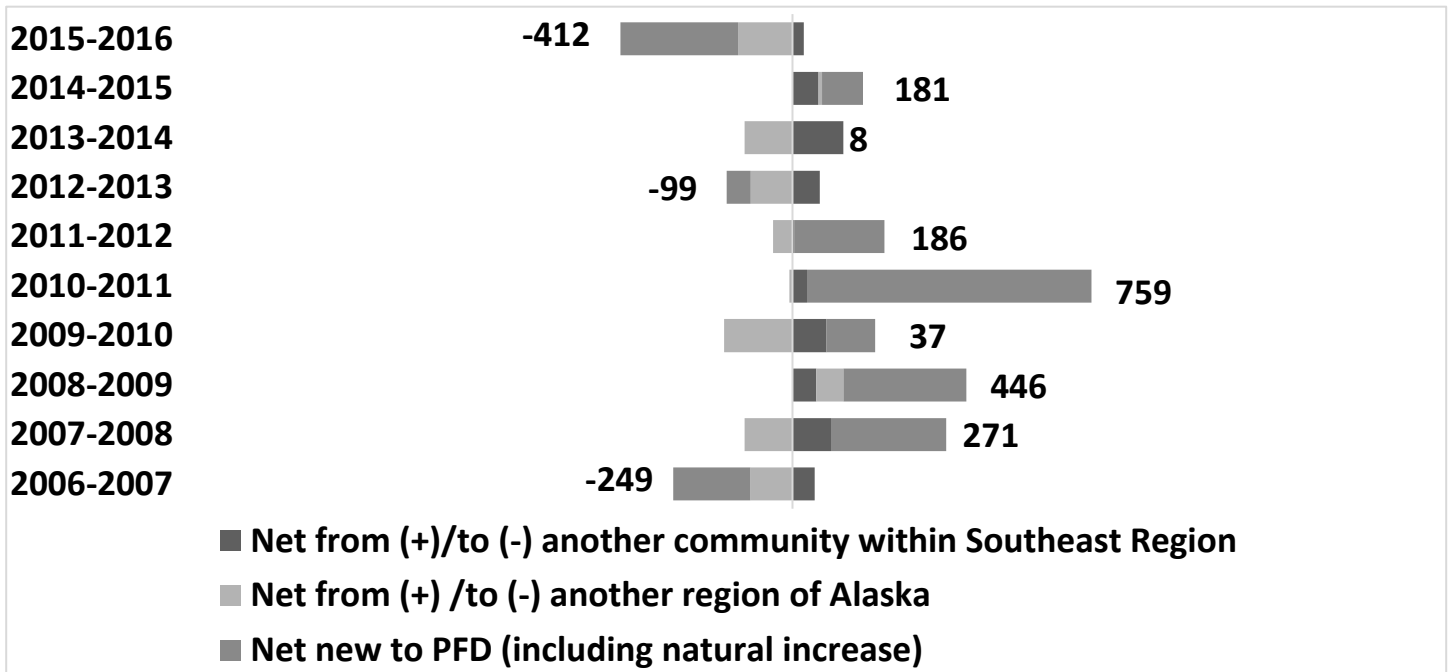


Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex" Dataset

Juneau Migration and Resident Transiency

The Alaska Department of Labor and Workforce Development uses Permanent Fund Dividend applications to track migration patterns between communities. Based on PFD filings, Juneau experienced a net loss of 412 people. As in previous years, most people who moved to or from Juneau came from or went to locations outside of Alaska. Within Alaska, Juneau again saw a net population loss to the Anchorage and Matanuska-Susitna region and a net gain from Southeast communities.

Figure 34: Total PFD-based Migration to and from Juneau, 2006 to 2016



Source: Alaska Department of Labor and Workforce Development, Research and Analysis, Migration Data and Information, PFD-Based Migration between Boroughs/Census Areas

Figure 35: PFD-based Migration to and from Juneau, 2015 to 2016

Region	Into Juneau	Out of Juneau	Net Migration
Anchorage and Mat-Su	179	350	-171
Gulf Coast	49	44	5
Interior	58	52	6
North	8	10	-2
Southwest	30	7	23
Haines Borough	30	33	-3
Hoonah-Angoon Census Area	59	49	10
Ketchikan Gateway Borough	42	48	-6
Petersburg Borough	25	29	-4
Prince of Wales - Hyder Census Area	34	32	2
Sitka, City and Borough	77	48	29
Skagway, Municipality	5	6	-1
Wrangell, City and Borough	9	6	3
Yakutat, City and Borough	7	8	-1
Southeast Region Total	288	259	29
Did not apply for PFD (including births and deaths)	2,087	2,389	-302

Source: Alaska Department of Labor and Workforce Development, Research and Analysis, Migration Data and Information, PFD-Based Migration between Boroughs/Census Areas

Regional Population Trends

Figure 36: Southeast Population by Borough and Census Designated Place 2012-2016

	July 2012	July 2013	July 2014	July 2015	July 2016	% change 2015-2016
Haines Borough	2,607	2,532	2,550	2,492	2,466	-1.0%
Covenant Life CDP	84	66	71	72	57	-20.8%
Excursion Inlet CDP	11	7	7	7	12	71.4%
Haines CDP	1,825	1,811	1,814	1,769	1,744	-1.4%
Lutak CDP	56	67	79	65	71	9.2%
Mosquito Lake CDP	289	266	265	253	256	1.2%
Mud Bay CDP	210	198	184	192	195	1.6%
Balance	132	117	130	134	131	-2.2%
Hoonah-Angoon Census Area	2,205	2,184	2,144	2,180	2,193	0.6%
Angoon City	455	438	417	425	408	-4.0%
Elfin Cove CDP	20	16	16	14	13	-7.1%
Game Creek CDP	19	25	18	21	21	0.0%
Gustavus City	489	502	519	533	558	4.7%
Hoonah City	773	797	790	782	793	1.4%
Klukwan CDP	92	93	84	93	95	2.2%
Pelican City	82	79	76	79	78	-1.3%
Tenakee Springs City	148	137	127	139	140	0.7%
Balance	127	97	97	94	87	-7.4%
Juneau City and Borough	32,704	32,917	33,022	33,137	32,739	-1.2%
Ketchikan Gateway Borough	13,886	13,828	13,871	13,810	13,758	-0.4%
Ketchikan City	8,260	8,293	8,330	8,284	8,191	-1.1%
Saxman City	430	409	423	413	418	1.2%
Balance	5,196	5,126	5,118	5,113	5,149	0.7%
Petersburg Census Area	3,254	3,201	3,206	3,185	3,179	-0.2%
Kupreanof City	33	25	25	19	21	10.5%
Petersburg City	2,960	2,944	2,962	2,928	2,935	0.2%
Balance	261	232	219	238	223	-6.3%
Prince of Wales-Hyder Census	6,444	6,485	6,503	6,490	6,440	-0.8%
Coffman Cove City	181	163	176	195	204	4.6%
Craig City	1,242	1,197	1,205	1,181	1,102	-6.7%
Edna Bay CDP	40	50	47	48	41	-14.6%
Hollis CDP	108	114	93	113	112	-0.9%
Hydaburg City	366	405	407	402	404	0.5%
Hyder CDP	97	94	93	84	84	0.0%
Kake City	597	621	627	620	605	-2.4%
Kasaan City	78	72	75	80	89	11.3%
Klawock City	799	781	806	821	814	-0.9%
Metlakatla CDP	1,460	1,469	1,485	1,471	1,467	-0.3%
Naukati Bay CDP	111	119	120	103	104	1.0%
Point Baker CDP	16	16	13	14	14	0.0%
Port Alexander City	59	55	45	64	58	-9.4%
Port Protection CDP	41	55	54	53	51	-3.8%
Thorne Bay City	504	518	533	515	532	3.3%
Whale Pass CDP	39	40	40	47	45	-4.3%

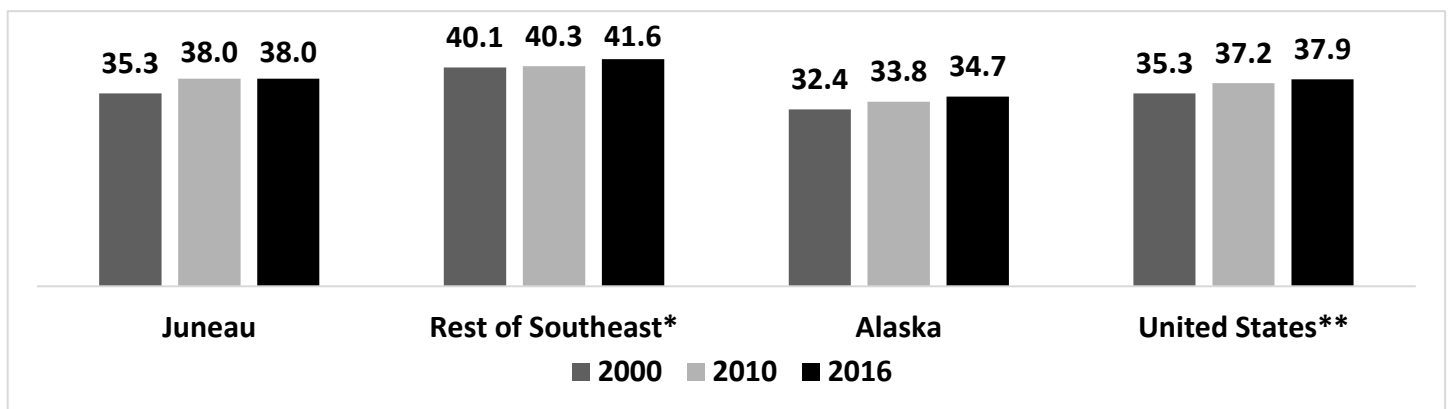
	July 2012	July 2013	July 2014	July 2015	July 2016	% change 2015-2016
Balance	706	716	684	679	714	5.2%
Sitka City and Borough	9,068	9,053	9,084	8,920	8,920	0.0%
Skagway Municipality	959	979	1,034	1,039	1,065	2.5%
Skagway CDP	909	923	970	982	1,004	2.2%
Balance	50	56	64	57	61	7.0%
Wrangell City and Borough	2,445	2,456	2,415	2,443	2,458	0.6%
Yakutat City and Borough	622	620	631	610	594	-2.6%
Southeast Total	74,194	74,255	74,460	74,306	73,812	-0.7%
Total excluding Juneau	41,490	41,338	41,438	41,169	41,073	-0.2%

Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Alaska Population Estimates by Borough, Census Area, City, and Census Designated Place (CDP)

Median Age

Juneau's median age has reversed its decline, returning to its previous high of 38.0. Juneau's population is older than the state average, but close to that of the nation. The Southeast region exclusive of Juneau is significantly older than Juneau, the state of Alaska, and the nation.

Figure 37: Median Age, 2000, 2010, and 2016

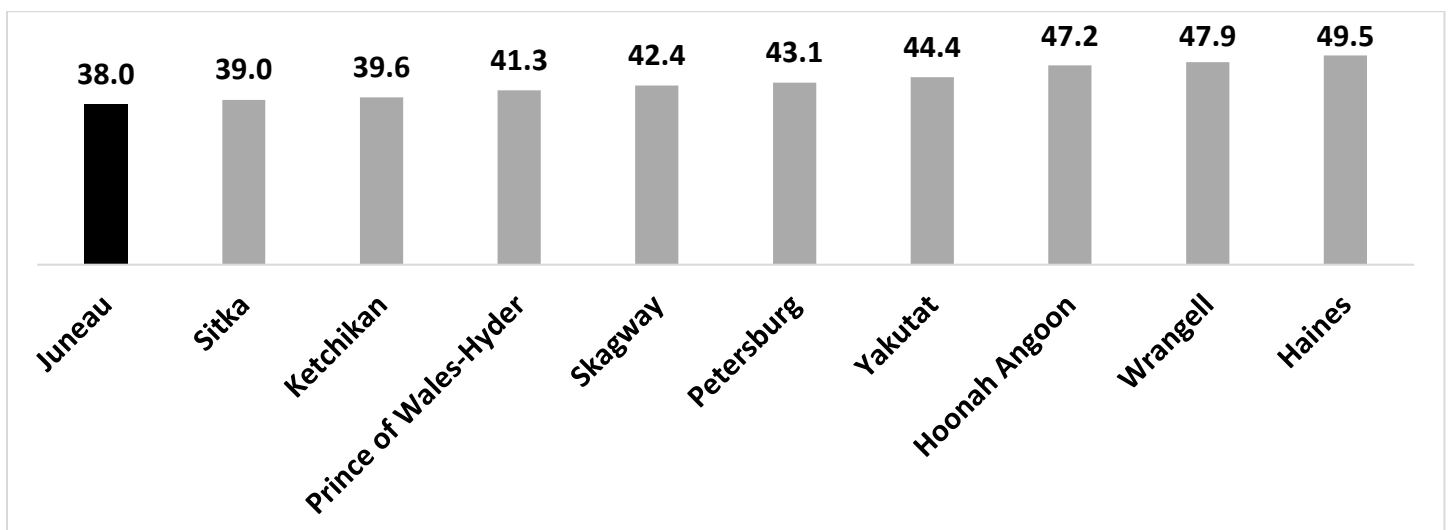


Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2016" Dataset; U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Single Year of Age and Sex for the United States, States, and Puerto Rico Commonwealth: April 1, 2010 to July 1, 2016

*Southeast median age calculated by average median ages for Southeast Alaskan cities (excluding Juneau) weighted by population.

**US median age calculated by the US Census Bureau as of July 1, 2016.

Figure 38: Median Age for Southeast Communities, 2016



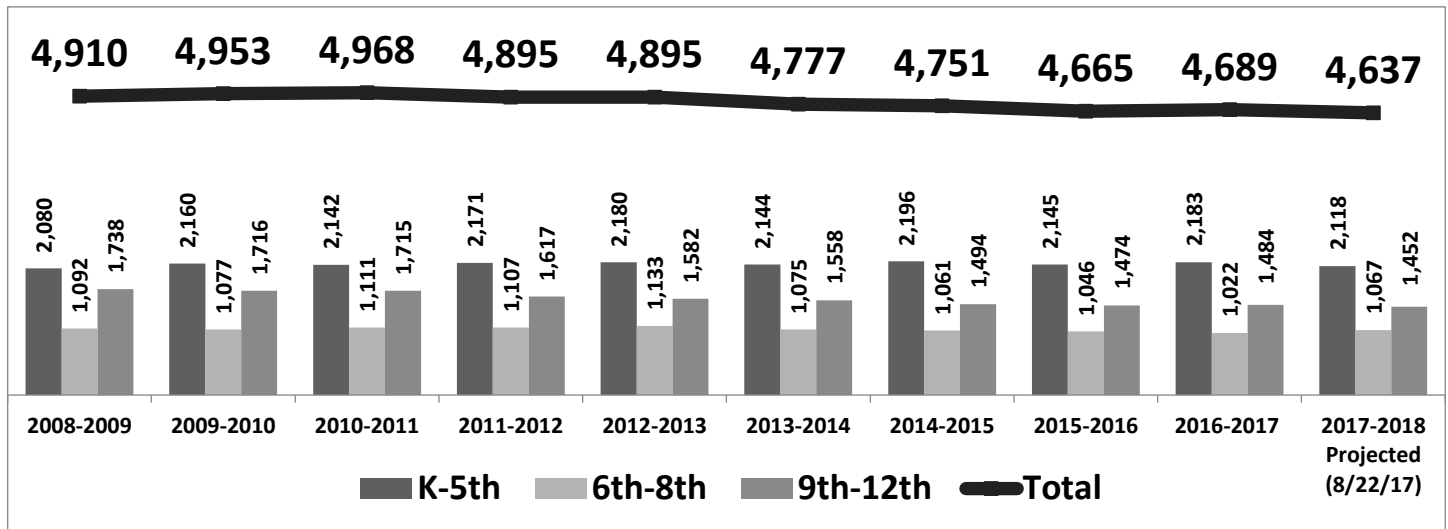
Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2016" Dataset

Education

Juneau School District Enrollment

The preliminary (August) count for the 2017-2018 school year totaled 4,637 students enrolled in the Juneau School District in grades K-12. The official (October) count for the prior school year was 4,689 students in grades K-12. The preliminary count for the current school year shows a decrease in students of just over 1 percent from last year. Enrollment numbers usually change by the official October count.

Figure 39: Juneau School District K-12 Enrollment by Grade, 2008 – 2018 (Projected)

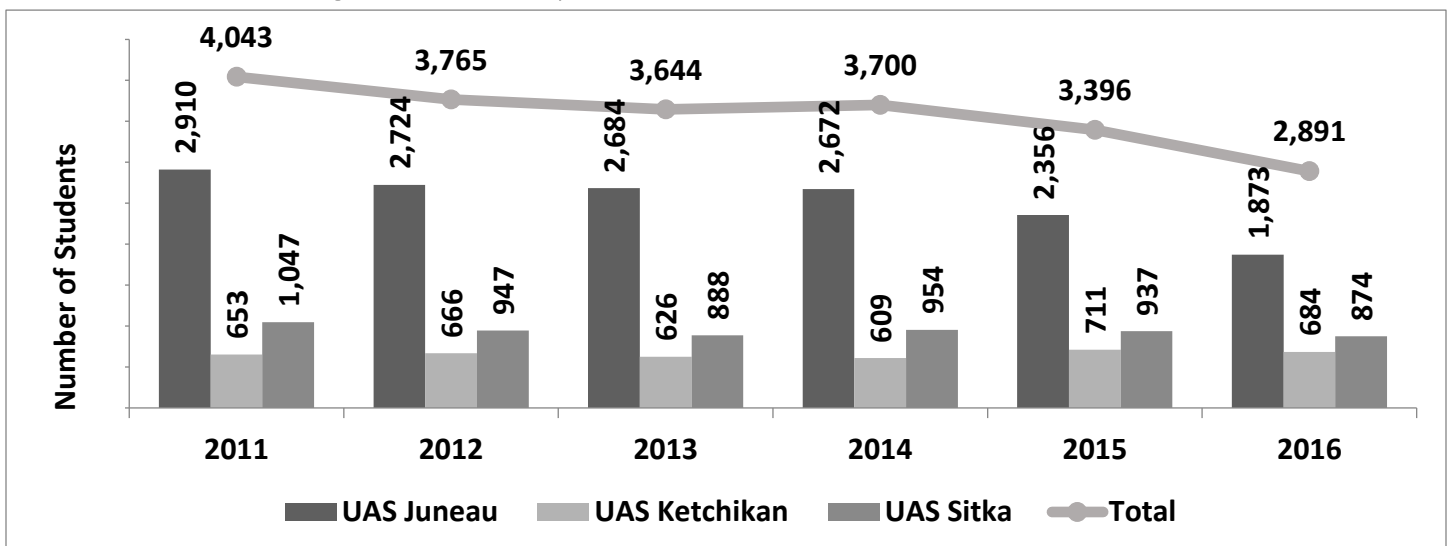


Source: Juneau School District

University of Alaska Southeast Enrollment

Enrollment at the University of Alaska Southeast was 2,891 in the fall of 2016, a decline of 28 percent since peak enrollment in 2011. The decrease in enrollment is a result of multiple factors: declining numbers of high school graduates across the entire state, the rise in the cost of tuition pricing out casual non-degree seeking students, and a shift in course offerings to support degree completion. The closure of the Professional Education Center plays a significant role in the decline on the Juneau Campus.

Figure 40: University of Alaska Southeast Fall Enrollment, 2012 to 2016

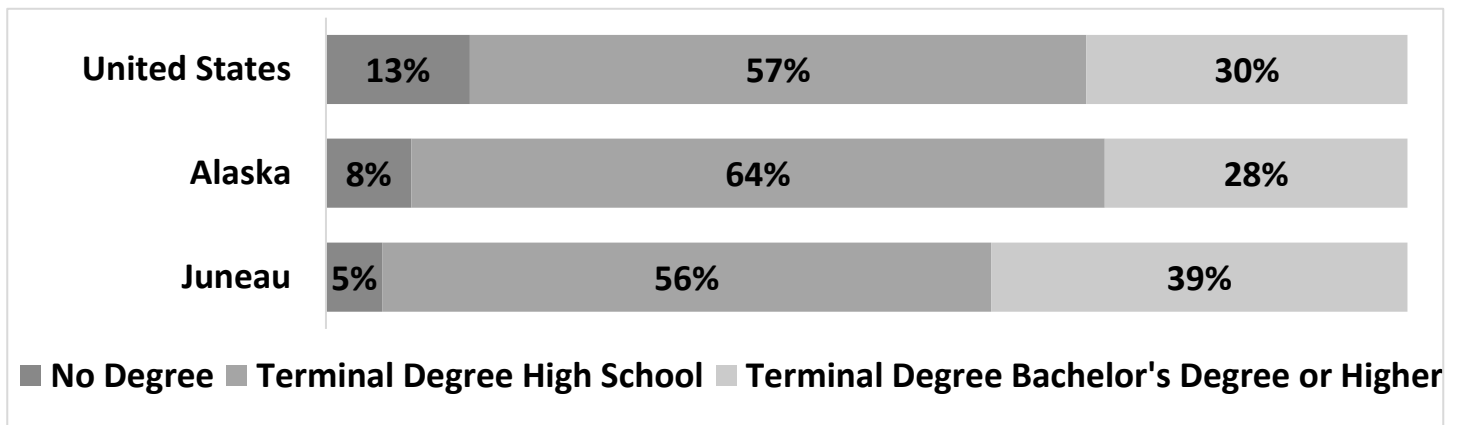


Source: University of Alaska Southeast Fall Convocation 2016 Fact Sheet; Note: Due to cross-registration, individual campus enrollments do not sum to total enrollment.

Educational Attainment

Juneau has a better educated population than Alaska overall or the nation. Thirty-nine percent have a bachelor's degree or higher compared to the national average of 30 percent and the state-wide average of 28 percent. Only 5 percent of Juneau residents 25 or older are without a high school diploma, compared to a state-wide average of 8 percent and a national average of 13 percent.

Figure 41: Terminal Degree by Percent of Population 25 Years and Older



Source: U.S. Census Bureau, 2011 -2015 American Community Survey 5-Year Estimates, "Educational Attainment" S1501 Dataset

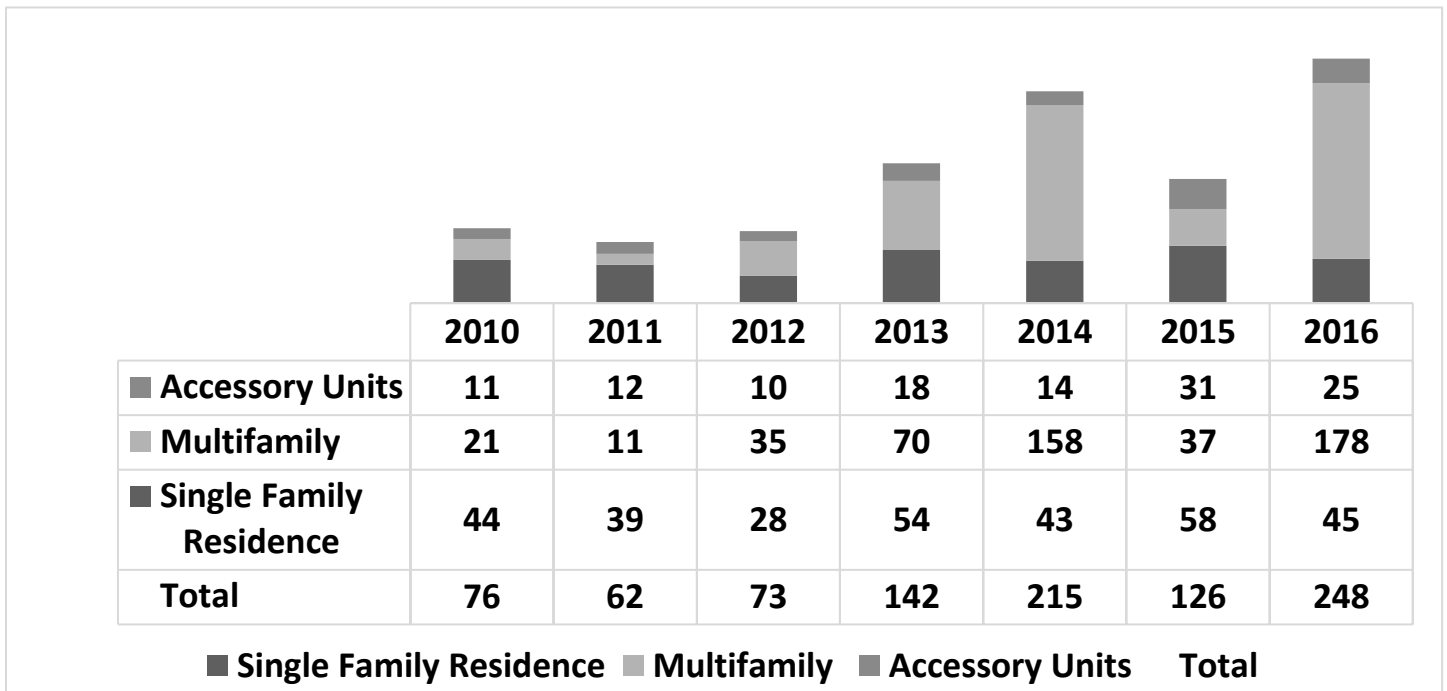
Construction and Housing

New Construction

Juneau New Housing Permits

In 2016, several special purpose multi-unit dwellings were permitted for construction, including 32 units for Housing First, 35 units for low income housing, and 49 units for a senior housing facility. Single family residence permits were down, but on par with their two-year cycle and permitting for accessory units continued above average.

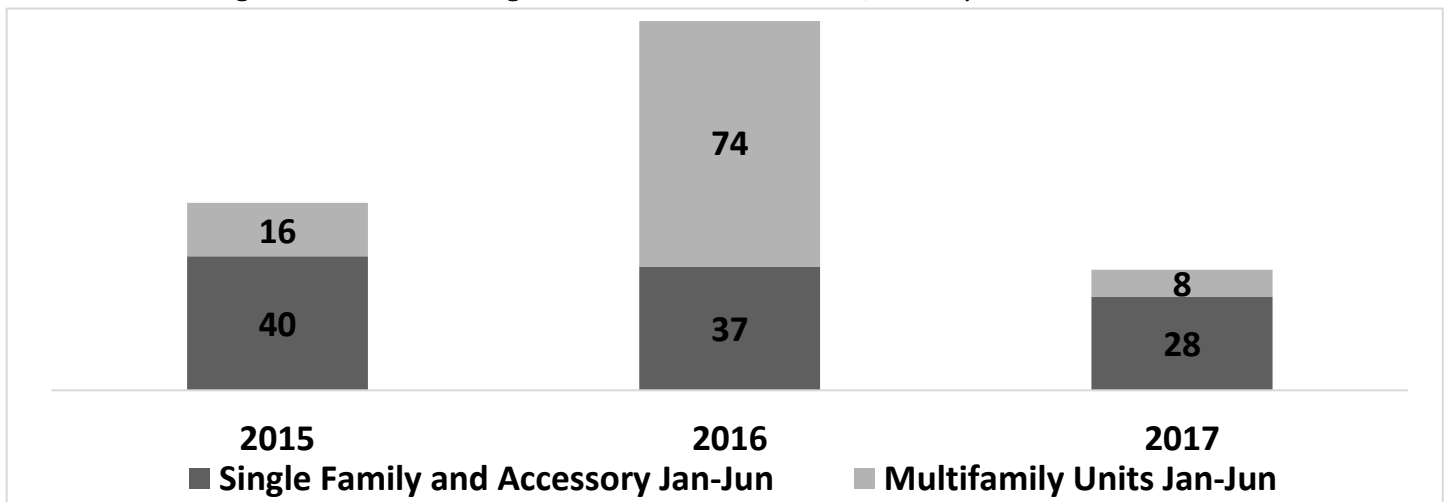
Figure 42: New Housing Units Permitted to be Built in Juneau 2010 to 2016



Source: City & Borough of Juneau Permit Center reports. Note: Multi-family includes properties with two or more dwellings.

New housing units permitted for the first half of 2017 are trailing behind both the first half of 2016 and the first half of 2015.

Figure 43: New Housing Units Permitted to be Built, January – June 2015 to 2017



Source: City & Borough of Juneau Permit Center reports. Note: Multi-family includes properties with two or more dwellings.

Southeast Alaska New Housing Construction

In addition to an increase in housing permits, Juneau saw an increase in housing units built in 2016 over the year before, adding 241 new units to its inventory. Most of the increase was a result of the projects for special needs populations. New single-family units were on par with the prior year. Craig, Haines, Ketchikan, Klawock, and Skagway also had an increase in their housing stock.

Figure 44: New Housing Units Built by Type of Structure, Select Communities 2014 - 2016

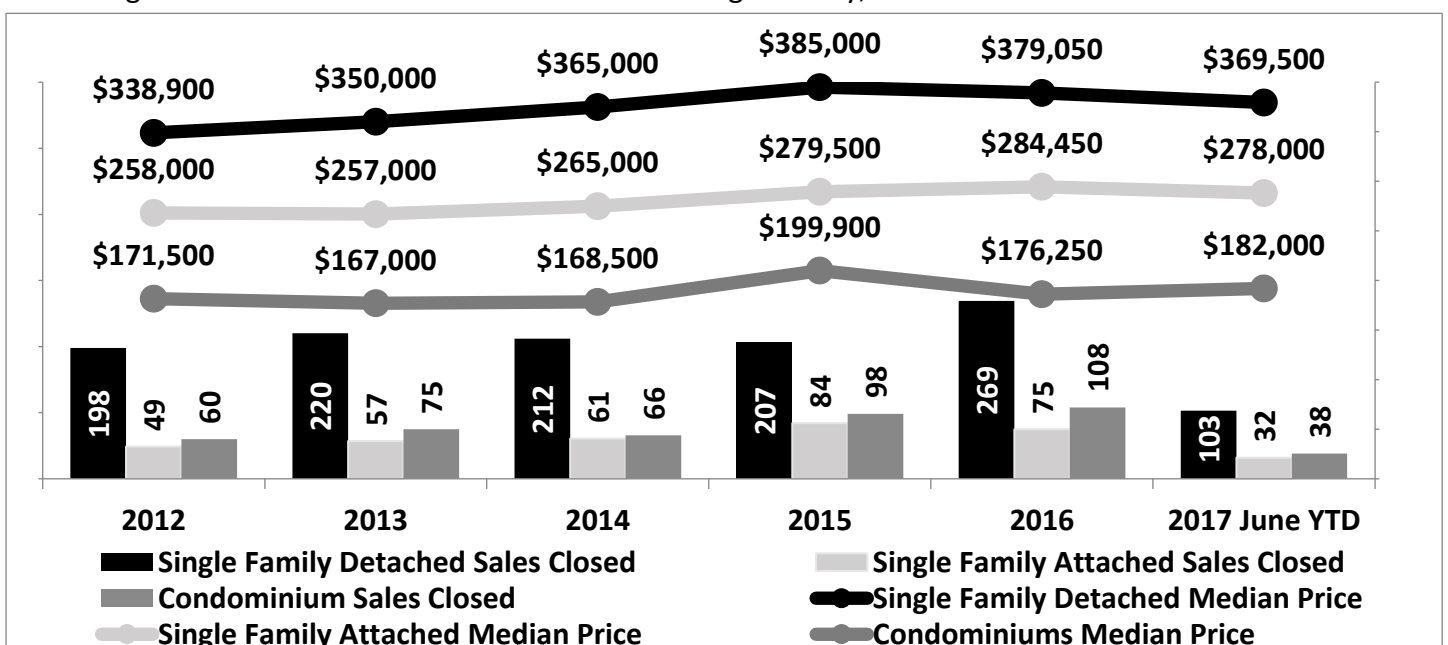
	Total Units 2014	Total Units 2015	Total Units 2016	Single Family 2014	Single Family 2015	Single Family 2016	Multi Family 2014	Multi Family 2015	Multi Family 2016
Craig	4	2	9	2	0	3	2	2	5
Haines	9	7	10	9	7	9	0	0	0
Hoonah	4	3	0	4	2	0	0	0	0
Juneau	220	96	241	51	76	69	168	20	172
Ketchikan Gateway Borough	36	21	46	27	17	22	9	4	24
Klawock	2	1	7	1	1	3	0	0	2
Petersburg	10	12	6	8	8	5	2	4	0
Sitka Borough	21	32	28	17	20	12	0	11	12
Skagway	4	8	15	4	6	12	0	2	3
Wrangell Borough	6	13	6	6	6	6	0	7	0

Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section and Alaska Housing Finance Corporation, Alaska Housing Market Indicators, "Quarterly Survey of Lenders" Dataset. Note: Single Family includes attached units; multi-family includes properties with two or more dwellings.

Juneau Home Sales and Prices

Single family home sales were up by 30 percent in 2016 over 2015, with 269 units changing hands. Condo sales were up 10 percent, while single family attached home sales were down 11 percent. The median transaction price for single family homes was down slightly in 2016, although still well above 2014 prices, at \$379,050.

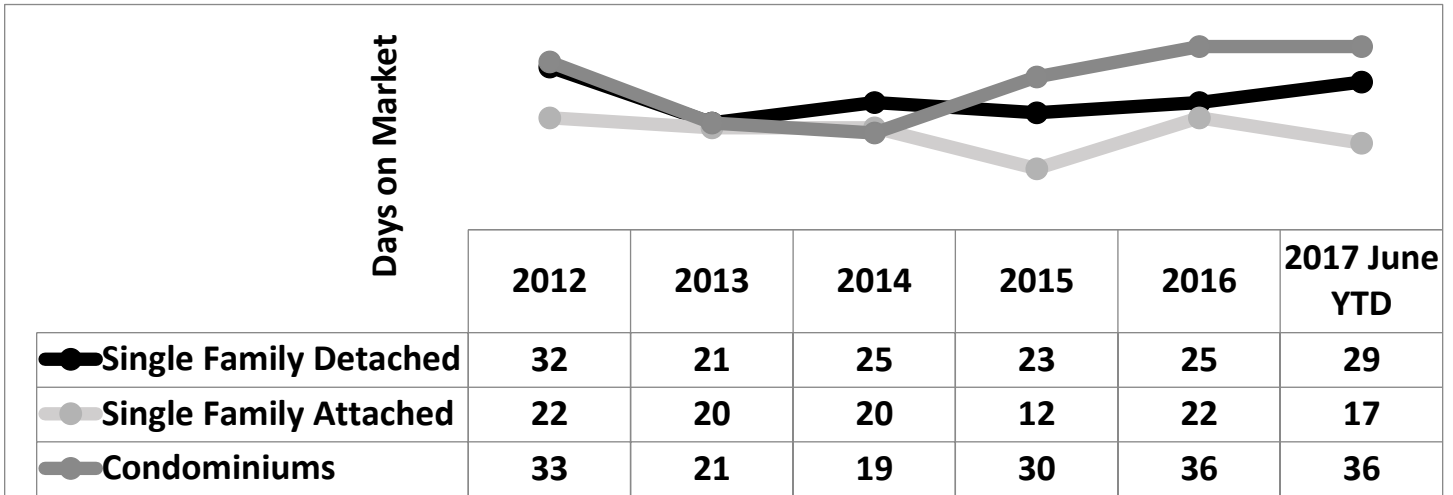
Figure 45: Median Price and Sales Volume of Single Family, Attached Homes and Condominiums



Source: Southeast Alaska Multiple Listing Service.

The rapid turnover for single family homes, less than 30 days, is an indication of a tight housing market in Juneau.

Figure 46: Median Days on Market, 2012 – 2016 (YTD June)

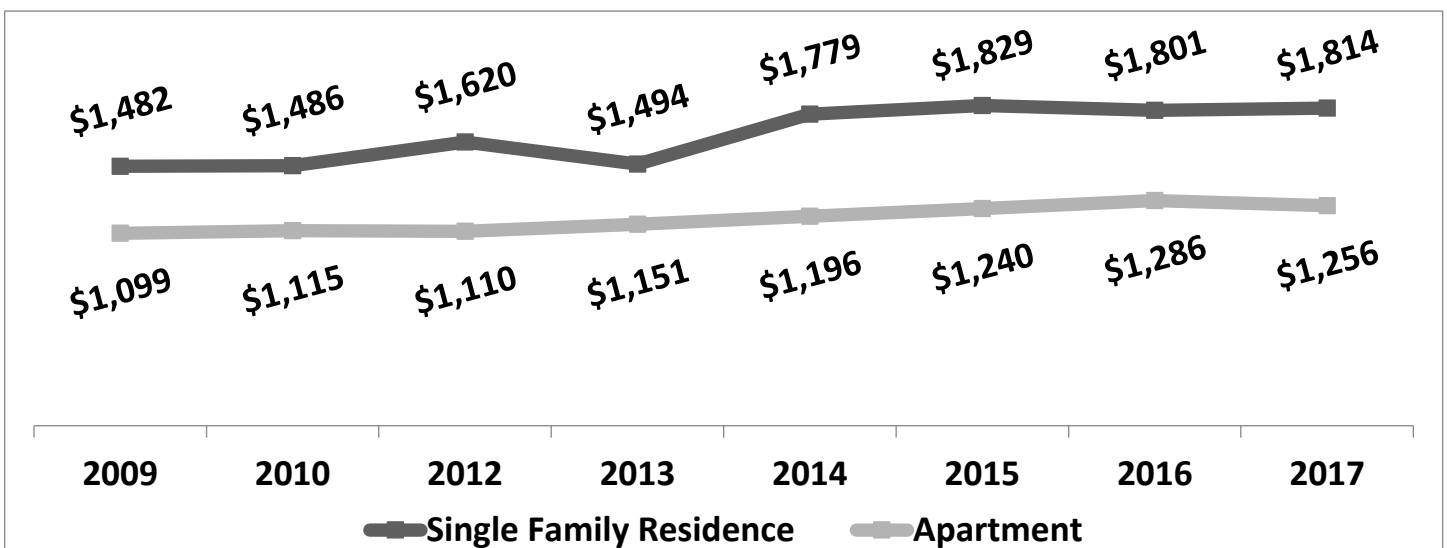


Source: Southeast Alaska Multiple Listing Service.

Monthly Rental Costs (Adjusted Rates) and Vacancy Rates

Every March, the Alaska Department of Labor and Workforce Development surveys Alaska’s landlords for residential rental unit information for the Alaska Housing Finance Corporation. In March 2017, the average rental price for a single-family residence in Juneau was \$1,814, up slightly from 2015, and the average rental price for an apartment was \$1,235, down 4 percent after several years of increase. The new units built that have recently come on the market, along with Juneau’s slight out-flow of population, have helped to reduce or keep prices flat.

Figure 47: Average Adjusted Juneau Rental Prices 2009-2017



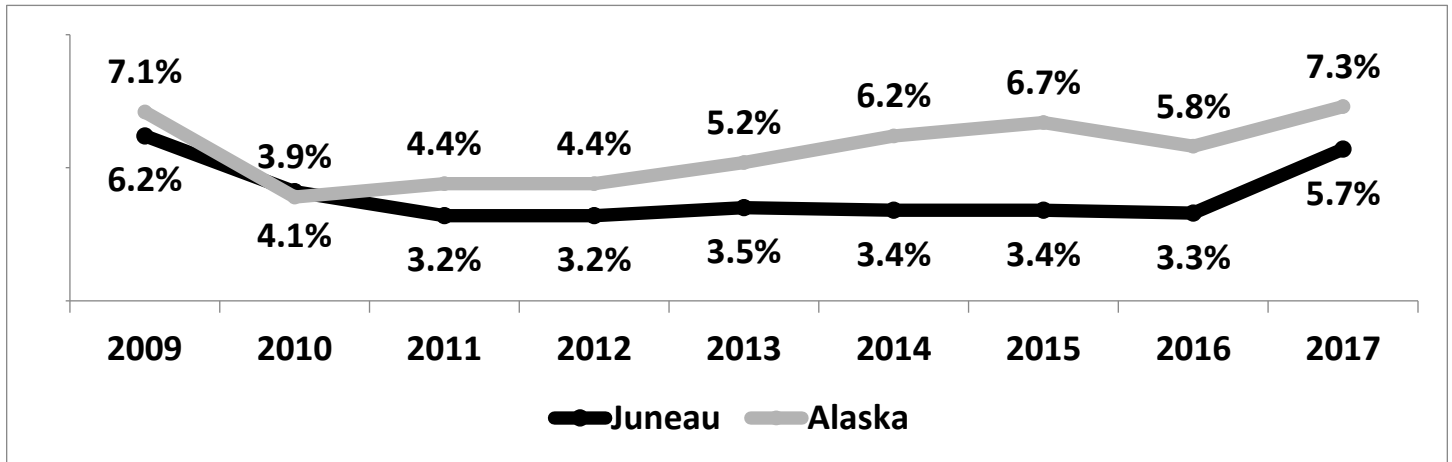
Source: Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, and Alaska Housing Finance Corporation, 2017 Rental Market Survey (March); Note: Rental price is adjusted to include heat, light, hot water, water, garbage, sewer and snow removal, if one or more of these utilities is not included in the rent.

Vacancy rates, at 5.7 percent, continue to remain well below the statewide average of 7.3 percent. According to the Alaska Department of Labor and Workforce Development, the ideal vacancy rate for a community is between 6 and 7 percent¹,

¹ Wiebold, Karinne. “Alaska’s Rental Market.” *Alaska Economic Trends*, Aug. 2016, pp. 4-7.
Juneau and Southeast Alaska Economic Indicators and Outlook, September 2017

because with more vacancies, renters have some choice in where to live, putting pressure on landlords to keep units in good repair and keep prices competitive.

Figure 48: Vacancy Rate for Juneau and Alaska for All Unit Types, 2009 -2017

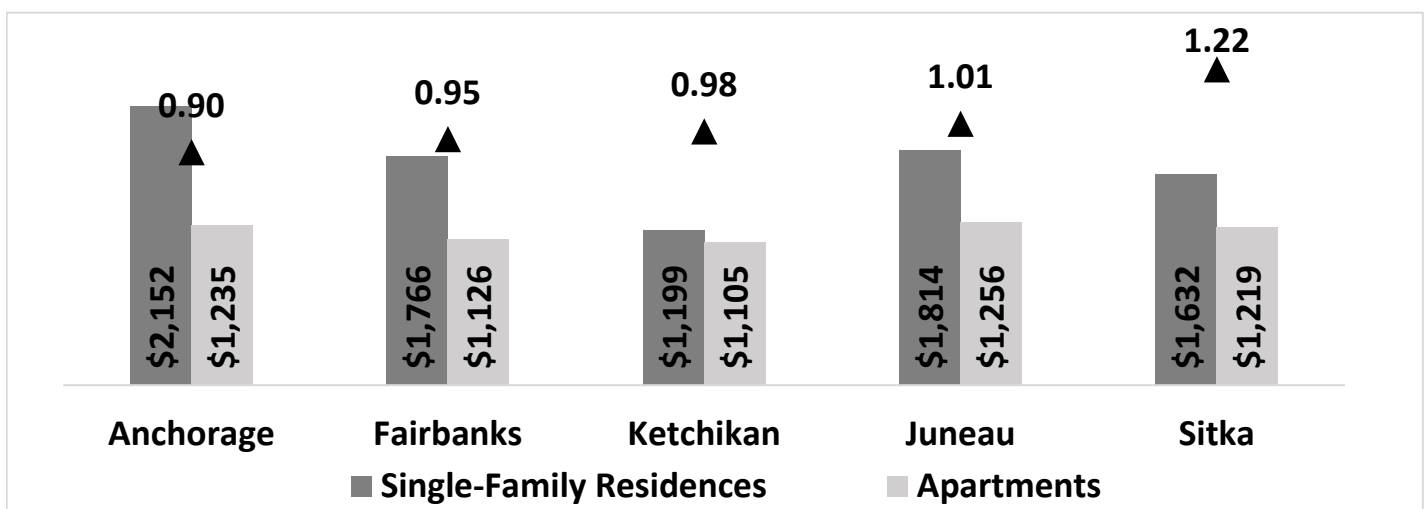


Source: Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, and Alaska Housing Finance Corporation, 2017 Rental Market Survey (March).

Rent and Utility Affordability Index

The rental and utility affordability index is an indication of the affordability of rental units in a community. The affordability index uses each community’s average wages to estimate how many monthly paychecks it would take to afford the average rent (assuming 30 percent of gross income is used for rent). While Anchorage requires only 90 percent of one paycheck because of its higher average wage, Juneau requires just over one paycheck to meet rental payments.

Figure 49: All Units Average Adjusted Rent, Select Communities, 2017



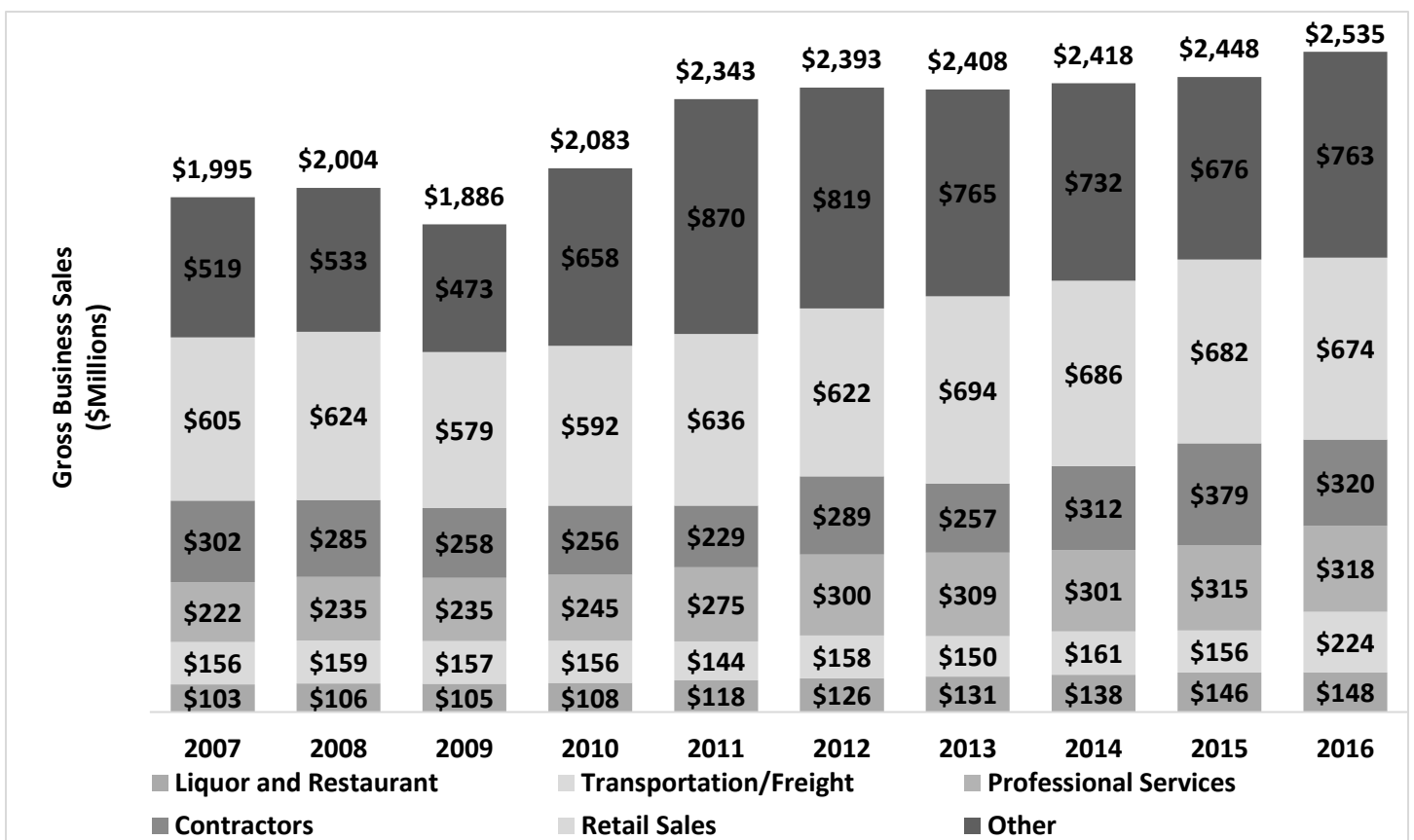
Source: Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, and Alaska Housing Finance Corporation, 2017 Rental Market Survey (March); Note: Rental price is adjusted to include heat, light, hot water, water, garbage, sewer and snow removal, if one or more of these utilities is not included in the rent.

Business and Industry

Gross Business Sales

Gross business sales in the City and Borough of Juneau were up by 3.6 percent in 2016. This increase was due in large part to a 44 percent increase in transportation and freight revenue. In addition, the “other” sales category, which includes mineral sales, wholesale equipment, food suppliers and fuel companies, among others, rebounded by 13 percent after several years of decrease. Contractor sales declined by 15 percent in 2016 after an increase of 21 percent in 2015 and in 2014.

Figure 50: Gross Business Sales in Juneau by Business Category (in Millions), 2007 – 2016



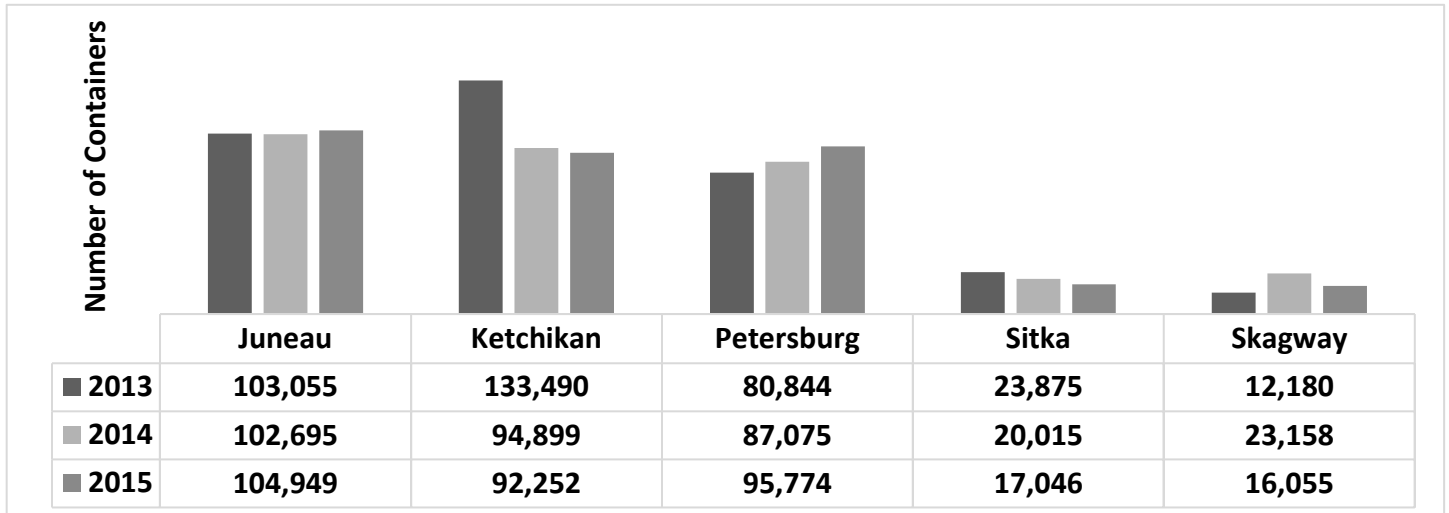
Source: City & Borough of Juneau Sales Tax Office and CBJ Comprehensive Annual Financial Report, July 1, 2015- June 30, 2016, Statistical Section.
 Note: “Other” category includes mineral sales, wholesale equipment, food suppliers, and fuel companies.

Freight Volumes

The five largest ports for waterborne container traffic in Southeast Alaska are Juneau, Ketchikan, Petersburg, Sitka, and Skagway. Juneau’s container traffic increased slightly in 2015 (the latest year for which data is available) to 104,949 TEUS (a unit of cargo capacity based on the volume of a 20-foot-long intermodal container). Ketchikan’s traffic decreased again in 2015, while Petersburg had another year of increased volume. Of Juneau’s loaded waterborne container volume, about 73 percent is inbound traffic and 27 percent is outbound. In contrast, Ketchikan’s loaded volume is 23 percent inbound and 77 percent outbound, and Petersburg’s loaded volume is 32 percent inbound and 68 percent outbound traffic.

Figure 51: Total Loaded Waterborne Container Traffic for Selected Southeast Ports, 2013 – 2015

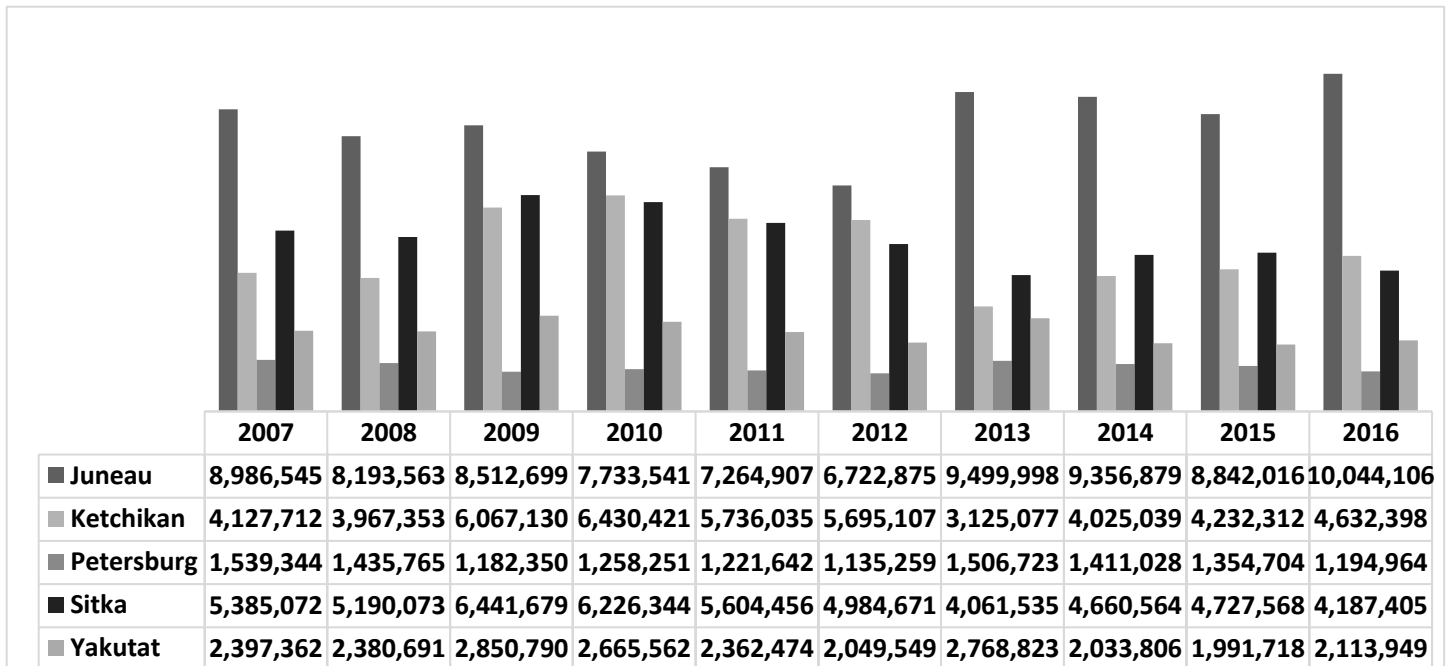
Source: US Army Corps of Engineers, Navigation Data Center, U.S. Waterborne Container Statistics Data Center Note: Numbers are in Twenty Foot



Equivalent Units (TEUS).

Juneau’s air freight enplanement volume rebounded by over 13 percent from 2015, a volume not reached since 2006. The primary product shipped from Juneau by air is seafood heading to Seattle.

Figure 52: On-Flight Freight Enplanement (Pounds in Thousands), 2007 – 2016



Source: Bureau of Transportation Statistics, T-100 Market Data

Travel and Visitor Industry

Businesses that serve the tourism industry often also serve the residents of Southeast Alaska. Examples are restaurants, travel agencies, and support services for air and water transportation. For this reason, it is not possible to separate out employment statistics that can be attributed just to the tourism industry. Rather, to report employment and wage data, JEDC aggregates all jobs in leisure, hospitality and transportation to gauge the health of the tourism industry.

Tourism grows the local economy because it brings money into a community from outside. It is a labor-intensive industry and many of its businesses are small or micro operators. In 2016 the number of firms in the industry decreased both in Juneau and region-wide; however, businesses grew their workforce by 1 percent in Juneau

and 2 percent region-wide. Additionally, total earnings increased by 6 percent for Juneau and by 5 percent for the region.

Figure 53: Leisure, Hospitality, and Transportation Industries Employment and Earnings, 2010-2016

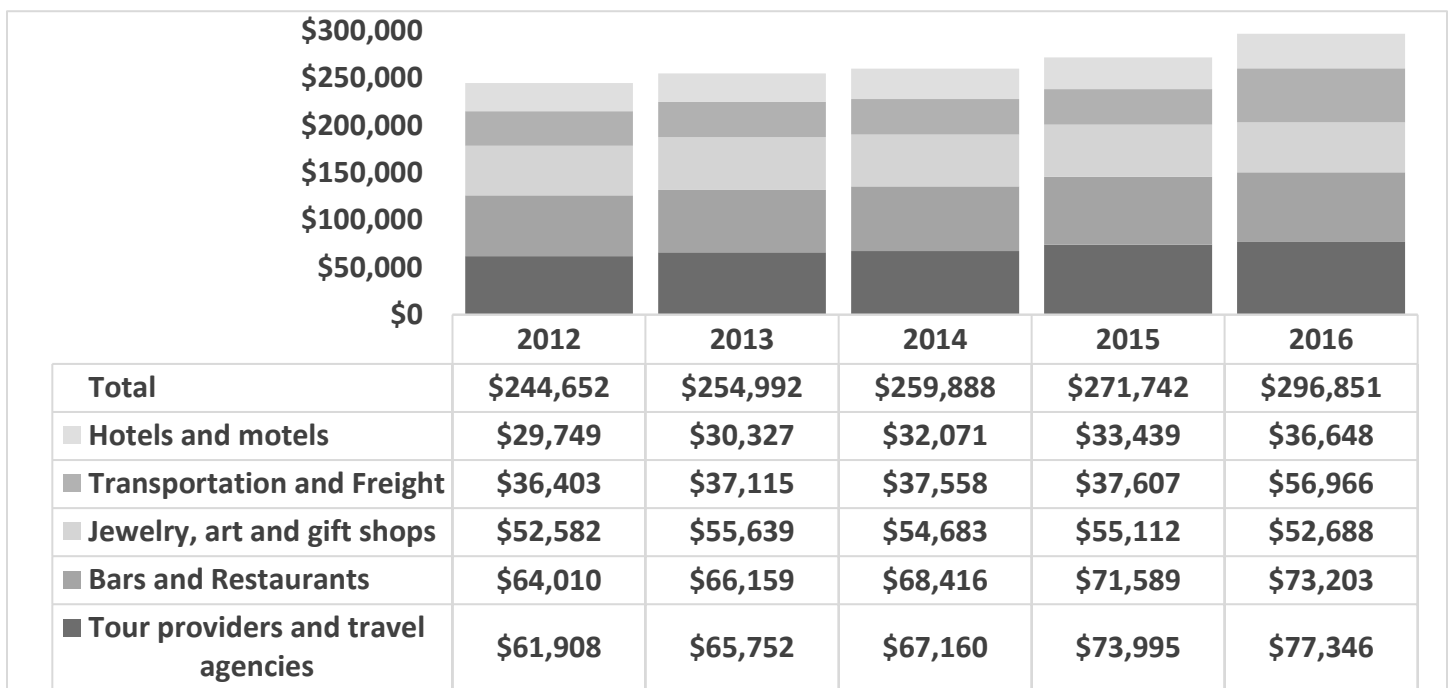
	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2012	186	641	2,642	6,059	\$68,591,819	\$170,219,568
2013	185	643	2,620	6,133	\$65,187,583	\$177,925,282
2014	190	645	2,732	6,323	\$71,830,777	\$184,722,667
2015	193	662	2,770	6,501	\$75,068,464	\$195,151,081
2016	190	645	2,784	6,648	\$79,294,933	\$205,880,420
Change 2015 to 2016	-2%	-3%	1%	2%	6%	5%

Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Tourist-related Business Sales

In 2016, Juneau’s gross business sales by tourist-related businesses were \$296.8 million dollars, an increase of more than 9 percent from the prior year. The transportation sector contributed most of the growth, with over 51 percent increase in sales. Tour providers and travel agencies also had a robust year, with nearly a 5 percent increase in sales.

Figure 54: Gross Business Sales by Tourist-Related Businesses (in Thousands), Juneau 2007 -2016



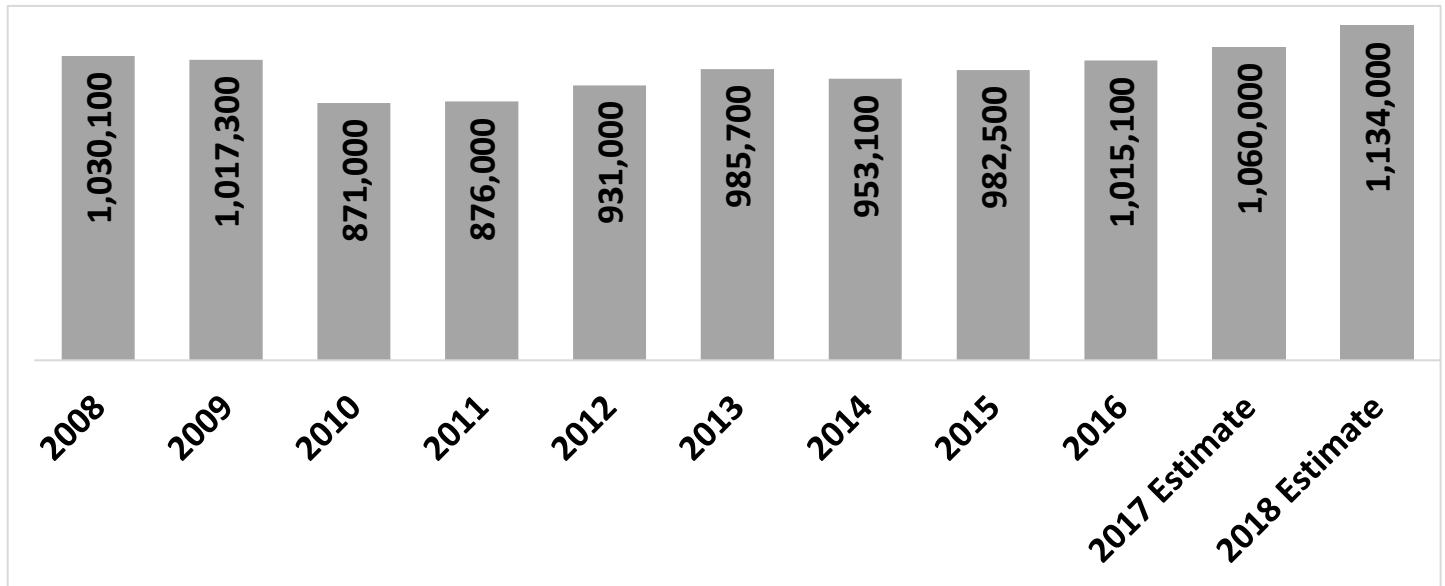
Source: City & Borough of Juneau Sales Tax Office and Comprehensive Annual Financial Report, July 1, 2015 to June 30, 2016

Cruise Ship Visitation

More than one million cruise passengers visited Juneau in 2016, and in 2017, with a projected 1.06 million visitors arriving by cruise ship, Juneau is projected to surpass its previous record peak reached in 2008. Preliminary projections for 2018 indicate that cruise visitation will increase almost 12 percent over 2016. A recent trend has been the growth in small cruise travel (ships under 250 passengers). From 2014 to

2016, the average number of small cruise visitors to Juneau has been around 15,000 per year. By 2018 this number is projected to grow to just over 17,000, an increase of 13 percent. Most small cruise passengers embark or disembark in Juneau and, therefore, have significantly more economic impact on the community. According to surveys done by the Alaska Department of Commerce, Community and Economic Development, cruise passengers on average spend \$624 per person while in Alaska. The average spending per person by small cruise passengers is \$1,350, because they often overnight in a community.

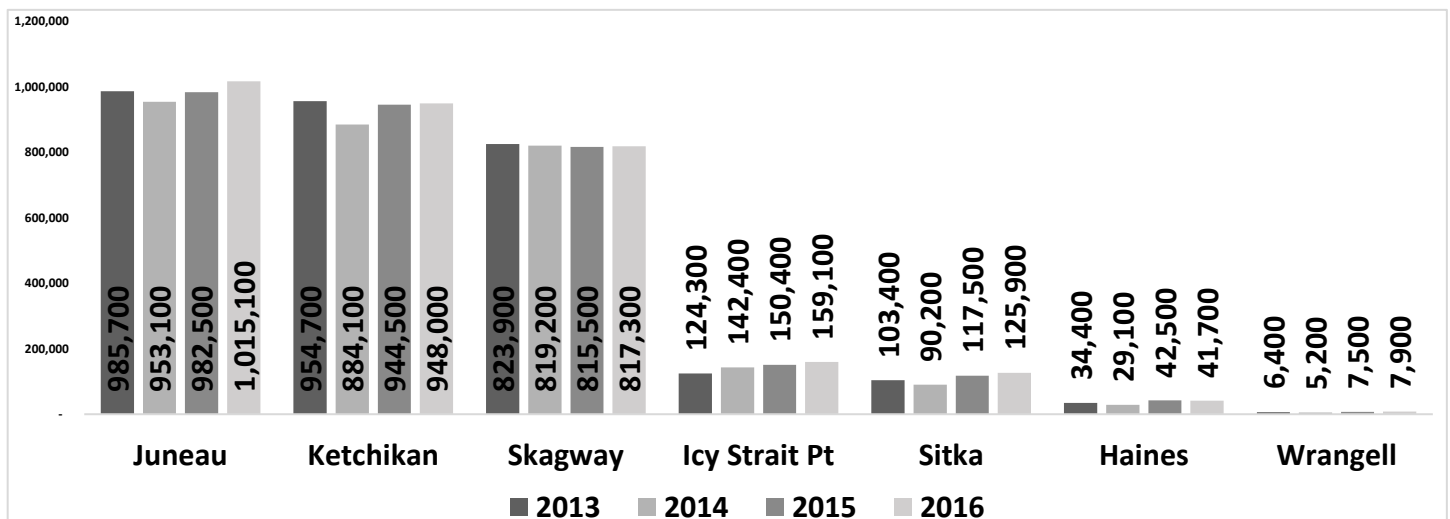
Figure 55: Cruise Passengers Visiting Juneau, 2008 - 2018 (Projected Estimate)



Source: Cruise Line Agencies of Alaska and McDowell Group. Note: 2017 and 2018 estimates are state-wide passenger volumes.

Juneau, followed by Ketchikan and then Skagway, are the three most visited ports in Alaska. In 2016, all communities except Haines had an increase in cruise volume over 2015.

Figure 56: Cruise Passengers Volumes for Southeast Alaska Communities, 2013 – 2016



Source: Cruise Line Agencies of Alaska and McDowell Group. Note: These figures do not include most small cruise ship volumes. Note: These figures do not include most small cruise ship lines.

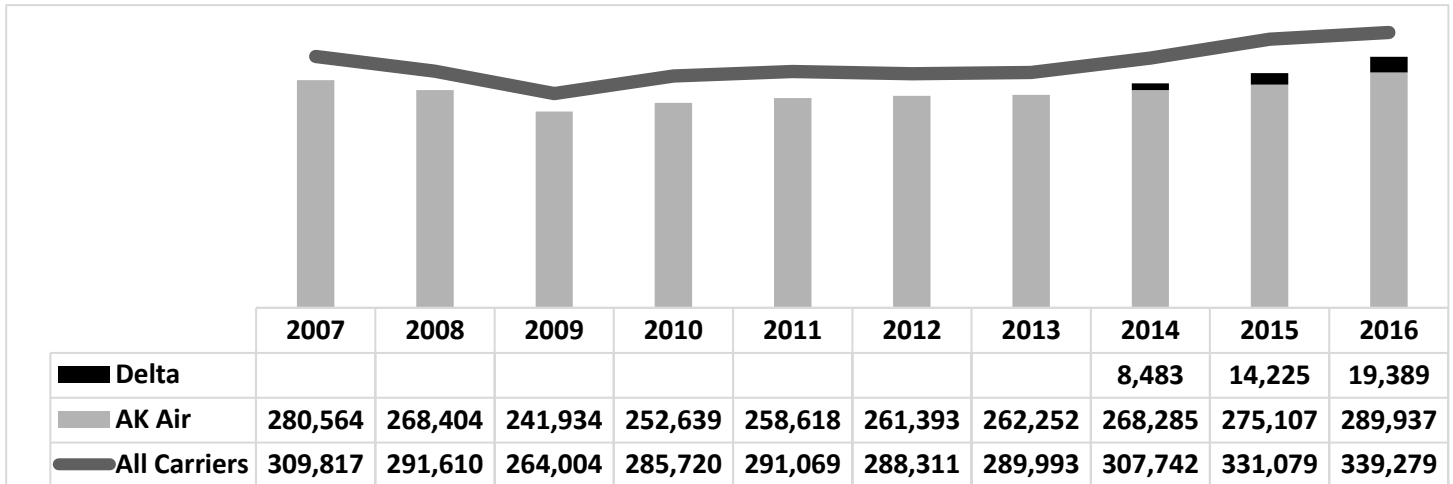
Airline Passenger Traffic

Passenger volume at the Juneau airport includes tourism travel, local and state business and government activity and residential travel. Passenger enplanement

statistics can serve as an indicator of economic activity in Juneau, since business, convention, and most independent tourism visitors come predominantly by air.

In 2016, its third year of jet service in the Juneau market, Delta operated for 8 months (January to September). Volume is expected to be lower in 2017 when Delta returns to a summer only schedule again. Alaska Airlines continued to provide Juneau with increased service, with an increase of over 5 percent in enplanements over 2015.

Figure 57: Scheduled Air Passenger Enplanements at Juneau International Airport, 2007 – 2016



Source: Bureau of Transportation Statistics, T-100 Market Data, ACAIS

Figure 58: Scheduled and Non-scheduled Air Passenger Enplanements at Select Southeast Communities

	2013	2014	2015	Percent Change 2014 - 2015	2016 (Preliminary)
Juneau	359,291	375,828	403,538	7.4%	381,594
Ketchikan	158,021	162,431	163,693	0.8%	172,253
Sitka	67,989	72,027	81,019	12.5%	78,979
Petersburg	20,046	19,065	20,477	7.4%	21,607
Wrangell	11,807	11,828	12,588	6.4%	12,569
Gustavus	10,176	9,484	11,189	18.0%	11,438
Yakutat	10,135	10,619	10,230	-3.7%	10,756
Hoonah	10,468	9,849	10,050	2.0	8,341
Klawock	1,550	7,780	9,966	28.1%	9,647
Haines	10,106	8,368	8,945	6.9%	8,936
Skagway	8,050	7,296	8,239	12.9%	8,714
Craig	3,387	2,869	2,573	-10.3%	2,581

Source: Federal Aviation Administration, Airports, Preliminary CY 2016 ACAIS. Note: Non-scheduled service includes air taxi/commercial and private activity.

Ferry Traffic

Ferry traffic volume reflects tourism travel as well as residential and regional personal travel. Service cutbacks continued to affect ferry traffic volume in 2016. The number of disembarking passengers in Juneau decreased by another 9 percent from the previous year, a result of continued sailing cut-backs. Region-wide, the number of disembarking passengers decreased by almost 9 percent.

Figure 59: Disembarking Ferry Passenger Traffic Juneau and Southeast, 2007-2016

Source: Alaska Department of Transportation, Alaska Marine Highway System, Marine Traffic Manager

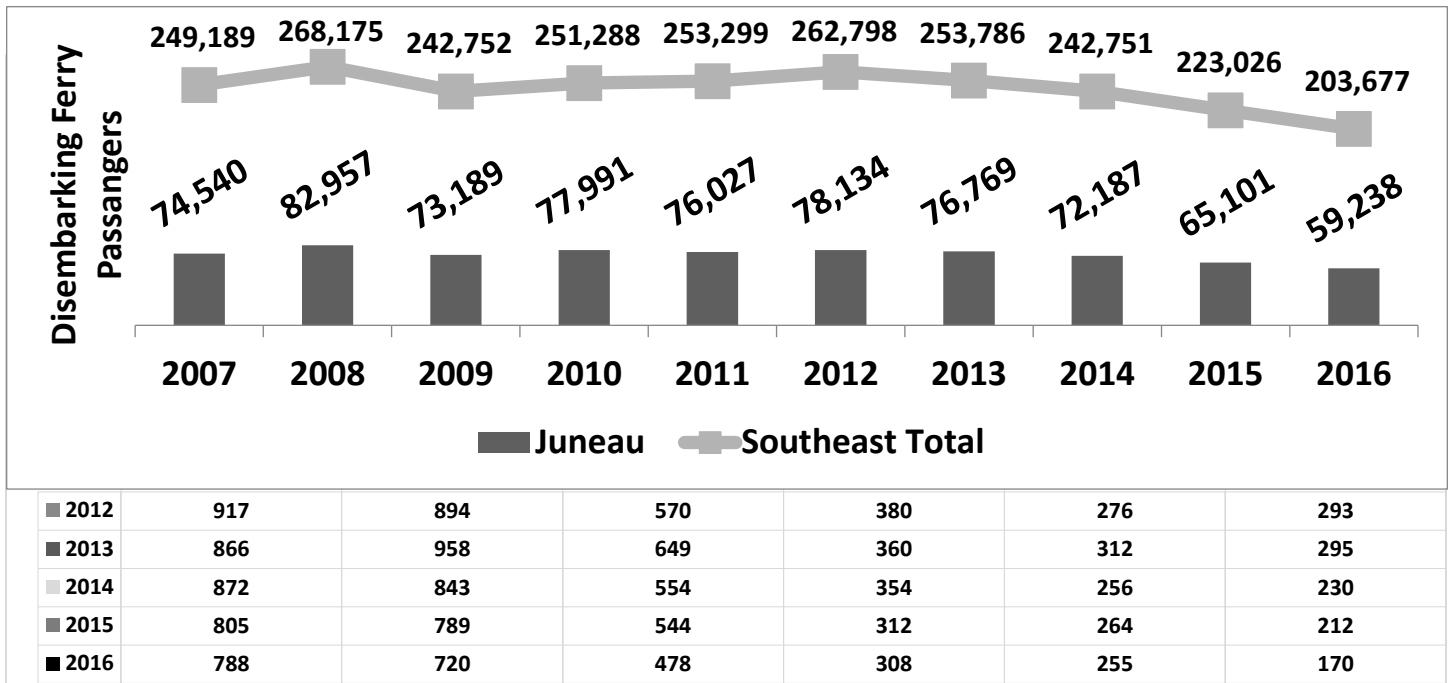


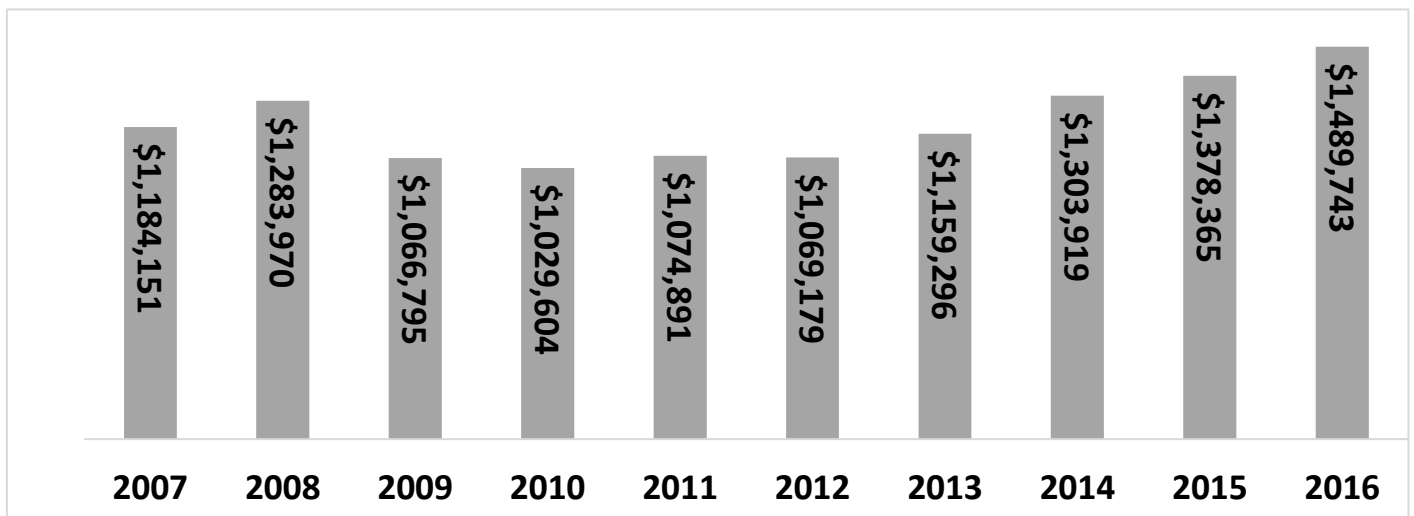
Figure 60: Alaska Marine Highway Port Departures for Select Communities, 2012– 2016

Source: Alaska Department of Transportation, Alaska Marine Highway System, Marine Traffic Manager

Visitor-related Tax Revenue

Juneau’s hotel tax can be used to indicate the health of the independent tourism and the business travel sectors. Hotel tax revenue continued to show strong gains in 2016 up 8 percent over 2015.

Figure 61: Juneau Hotel Tax Revenue, 2007 – 2016



Source: City and Bureau of Juneau Comprehensive Annual Financial Report, July 1, 2015- June 30, 2016, Statistical Section

Health Care Industry

In 2016, employment in the private health care and social service sector was flat in Juneau, with 1,705 jobs, and region-wide, with 3,683 jobs. However, earnings have continued to grow over this same period, with an increase of 1.7 percent in Juneau and 1.9 percent region-wide. As the regional population ages, there will be increased need for health and social services, contributing to continued industry growth.

Figure 62: Private Health Care and Social Services Employment and Payroll, 2012-2016

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2012	122	236	1,795	3,909	\$67,270,222	\$158,399,236
2013	121	248	1,739	3,839	\$68,097,281	\$158,927,374
2014	124	257	1,716	3,717	\$70,935,083	\$159,087,405
2015	123	259	1,692	3,662	\$71,932,471	\$161,310,761
2016	122	261	1,705	3,683	\$73,180,260	\$164,297,414
Change 2015 to 2016	-0.8%	0.8%	0.8%	0.6%	1.7%	1.9%

Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Natural Resources and Mining Industry

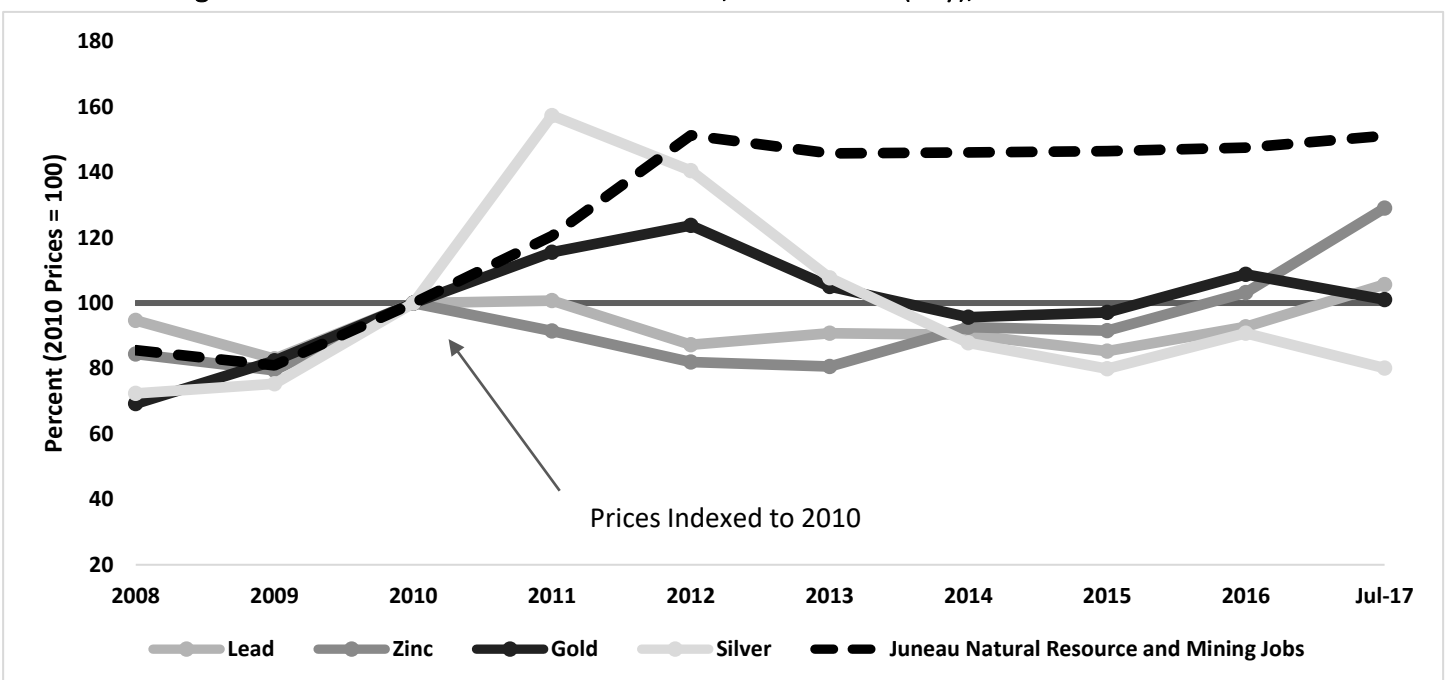
Juneau’s strong job growth in the natural resources and mining sector (predominantly mining employment) ended in 2012. After a decrease in 2013, employment levels have increased slightly in Juneau, as have earnings, growing 1.8 percent over 2015. According to the World Bank commodity markets outlook released in April 2016, gold prices are expected to decline in 2017 on further U.S. interest rate increases, and silver prices will rise slightly from current levels with strong industrial demand. Lead and zinc will also be up. Mining employment is expected to hold at current levels for the foreseeable future.

Figure 63: Natural Resources and Mining Employment and Payroll, 2012-2016

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2012	10	67	841	1,202	\$79,556,099	\$98,628,258
2013	11	76	810	1,173	\$80,205,983	\$100,074,331
2014	12	77	812	1,184	\$80,470,161	\$100,498,958
2015	11	78	814	1,185	\$82,119,693	\$102,980,934
2016	12	72	820	1,158	\$83,569,703	\$101,998,336
Change 2015 to 2016	9.1%	-7.7%	0.7%	-2.3%	1.8%	-1.0%

Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Figure 64: Prices of Metals Mined in Juneau, 2008 – 2017 (July), Indexed to 2010 Dollars



Source: The World Bank, Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Prices are in real dollars.

Southeast Alaska Resident Fishermen

Juneau had 745 residents participate in the Southeast Alaska fish harvest in 2016, representing just under 16 percent of total regional participants. The number of fishing permits issued and the number of fishermen who fished increased from 2015. However, crew licenses were down by 10 percent, bringing total participation down 5 percent for Juneau.

Figure 65: Southeast Alaska Resident Commercial Fishermen, 2016 Preliminary

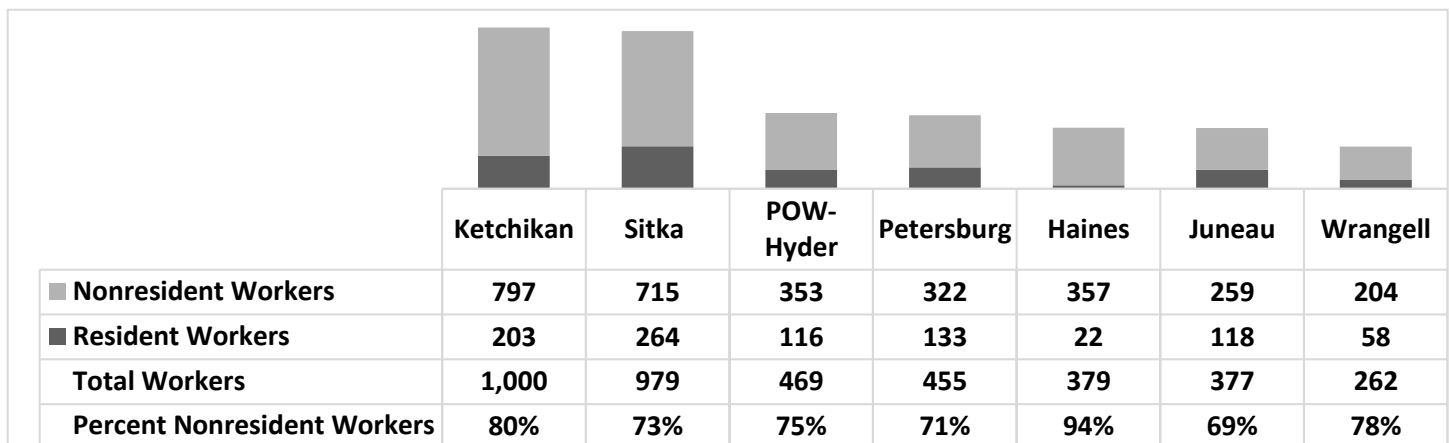
Borough or Census Area	Fishing Permits Issued	Permit Holders	Fisherman who Fished	Fishing Crew Licenses	Total Participation
Sitka	1,039	545	450	692	1,142
Petersburg	1,096	491	381	392	773
Juneau	658	411	279	466	745
Ketchikan Gateway	603	355	239	418	657
POW-Hyder	525	294	219	304	523
Wrangell	397	213	167	260	427
Hoonah-Angoon	259	177	108	86	194
Haines	160	106	80	103	183
Yakutat	233	152	121	57	278
Total Southeast 2016	4,970	2,744	2,044	2,725	4,822
Total Southeast 2015	5,033	2,785	2,075	2,788	4,800
Change 2015-2016	-1.3%	-1.5%	-1.5%	1.9%	0.5%

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City", 2015 Preliminary; Alaska Department of Fish & Game, 2015 Comm. Crew Licenses dataset.

Seafood Processing Employment in Southeast Alaska

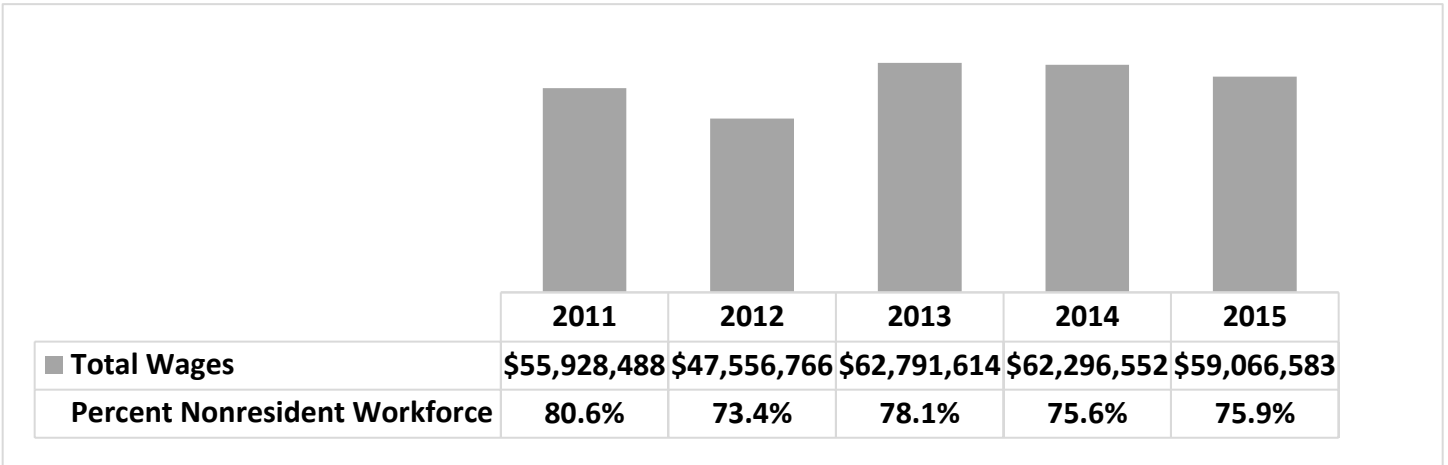
Seafood processing, a primary component of Southeast Alaska’s manufacturing segment, employed a total of 4,029 workers, 76 percent were non-Alaska residents, over the course of 2015, the latest year for which data is available. Ketchikan and Sitka hosted most of the seafood processing workers. Employment in seafood processing was down by 1 percent in 2015 over 2014, and total industry wages decreased by 5 percent.

Figure 66: Resident and Nonresident Seafood Processing Workers, Select Communities 2015



Source: Alaska Department of Labor and Workforce Development, "Residency of Alaska Workers", 2015 Dataset, Table 12. Note: Worker count is the cumulative number of workers who worked over the course of a year, not the number of jobs.

Figure 67: Total Wages and Percent Nonresident Seafood Processing Workforce, Southeast Alaska 2011-2015

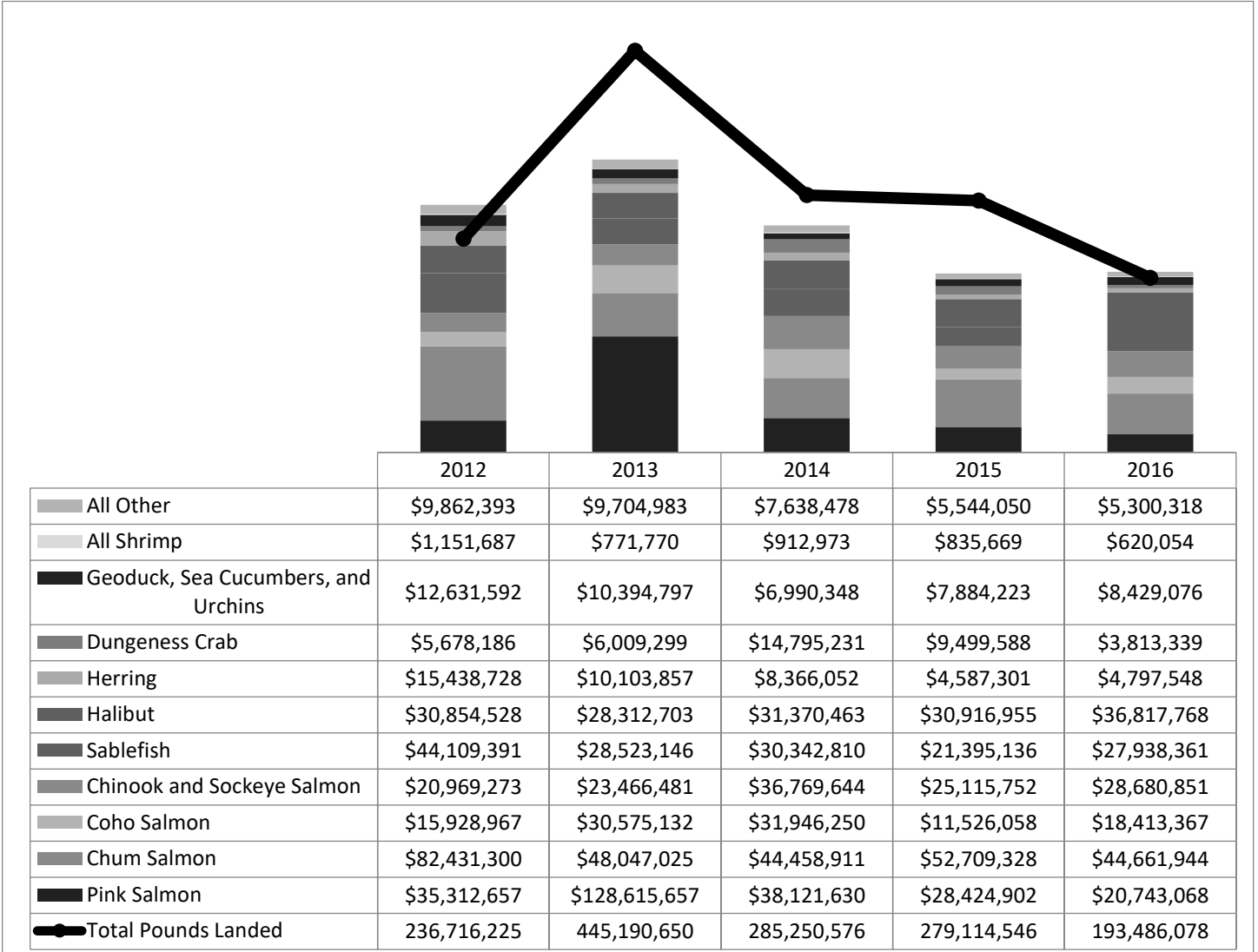


Source: Alaska Department of Labor and Workforce Development, "Residency of Alaska Workers", 2014 Dataset, Table 12. Note: Worker count is the cumulative number of workers who worked over the course of a year, not the number of jobs.

Commercial Harvest in Southeast Alaska

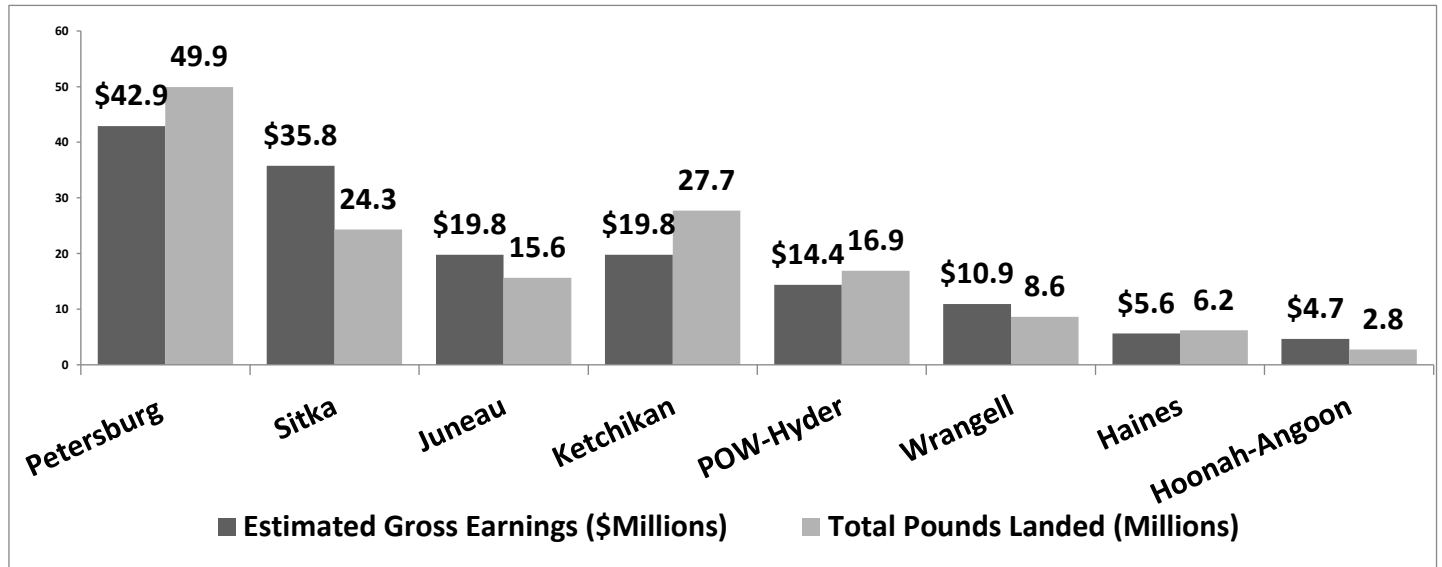
Overall commercial harvest values and volume continued to decline in 2016 in Southeast Alaska. Pink and Chum salmon harvests were significantly down, but several communities, such as Juneau, POW-Hyder, Haines and Yakutat, saw a slight increase in total earnings despite lower volumes. Juneau has a diverse fishery, and a strong halibut season helped overall value remain stable. According to the Alaska Seafood Marketing Institute’s market outlook, pink salmon harvests are expected to rebound significantly in 2017, as odd years tend to produce larger harvests. Coho harvests are also projected to increase, while Chum harvests are forecast to be flat.

Figure 68: Southeast Alaska Commercial Seafood Industry Ex-Vessel Value by Species and Pounds Landed, 2012 - 2016



Source: Alaska Department of Fish and Game personnel and "Commercial Operators Annual Report"

Figure 69: Estimated Gross Earnings (\$Millions) and Pounds Landed (Millions) by Southeast Alaska Residents for Select Communities, 2016



Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2016

Figure 70: Commercial Fish Harvest by Southeast Alaska Residents: Gross Earnings (Value) and Pounds Landed (Volume) in Thousands, 2014-2016

Area of Residency	Value 2014	Value 2015	Value 2016 Preliminary	Volume 2014	Volume 2015	Volume 2016 Preliminary
Petersburg	\$56,560,068	\$45,142,831	\$42,920,470	66,545,202	62,610,351	49,939,371
Sitka	\$43,868,238	\$38,262,116	\$35,791,626	35,688,953	36,462,451	24,296,811
Juneau	\$21,934,752	\$19,313,908	\$19,798,317	17,900,497	23,145,218	15,639,054
Ketchikan	\$21,575,688	\$22,249,205	\$19,761,324	33,956,561	35,718,121	27,739,285
POW-Hyder	\$17,424,028	\$12,844,682	\$14,383,725	20,867,502	17,138,277	16,913,663
Wrangell	\$14,654,672	\$11,542,024	\$10,929,397	12,103,620	11,141,526	8,642,501
Haines	\$7,272,535	\$4,949,648	\$5,620,255	5,609,213	5,028,532	6,210,531
Hoonah-Angoon	\$6,468,287	\$4,788,752	\$4,650,069	3,773,269	5,115,429	2,775,667
Yakutat	\$4,286,404	\$3,854,769	\$4,124,275	2,923,456	2,581,067	2,410,139
Total Southeast	\$194,044,672	\$162,947,935	\$157,979,458	199,368,273	198,940,972	154,567,022

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2016

State of Alaska Shared Fish Taxes

Fisheries business tax is collected primarily from licensed processors and persons who export fish from Alaska. Alaska statutes provide that a percentage of revenue collected be shared with municipalities in which the processing took place. For fiscal year 2016, Southeast communities received a total of \$2.7 million from these taxes, down from the prior year.

Figure 71: Select Southeast Communities Receiving Shared Fish Taxes, 2012 - 2016

Fisheries Business Tax	2012	2013	2014	2015	2016
Sitka	\$1,256,103	\$1,183,956	\$1,127,772	\$1,009,033	\$879,793
Petersburg	\$1,036,385	\$760,730	\$1,249,730	\$820,118	\$336,848
Juneau	\$422,230	\$384,415	\$395,010	\$364,624	\$312,519
Wrangell	\$380,741	\$288,004	\$329,987	\$392,076	\$233,563
Ketchikan City	\$472,507	\$454,435	\$743,083	\$237,876	\$199,435
Ketchikan Borough	\$666,360	\$709,134	\$783,700	\$238,773	\$199,188
Craig	\$258,534	\$282,111	\$314,704	\$342,739	\$198,800

Haines Borough	\$326,813	\$172,511	\$438,083	\$212,855	\$150,045
Hoonah	\$113,615	\$103,975	\$110,249	\$76,574	\$121,208
Yakutat Borough	\$254,820	\$202,334	\$250,998	\$191,216	\$87,436
Klawock	\$19,212	\$620	\$180	\$0	\$1,671
Kake	\$5,824	\$16,198	\$24,241	\$14,901	\$1,012
Total Southeast	\$5,224,667	\$4,561,416	\$5,771,756	\$3,904,681	\$2,723,549

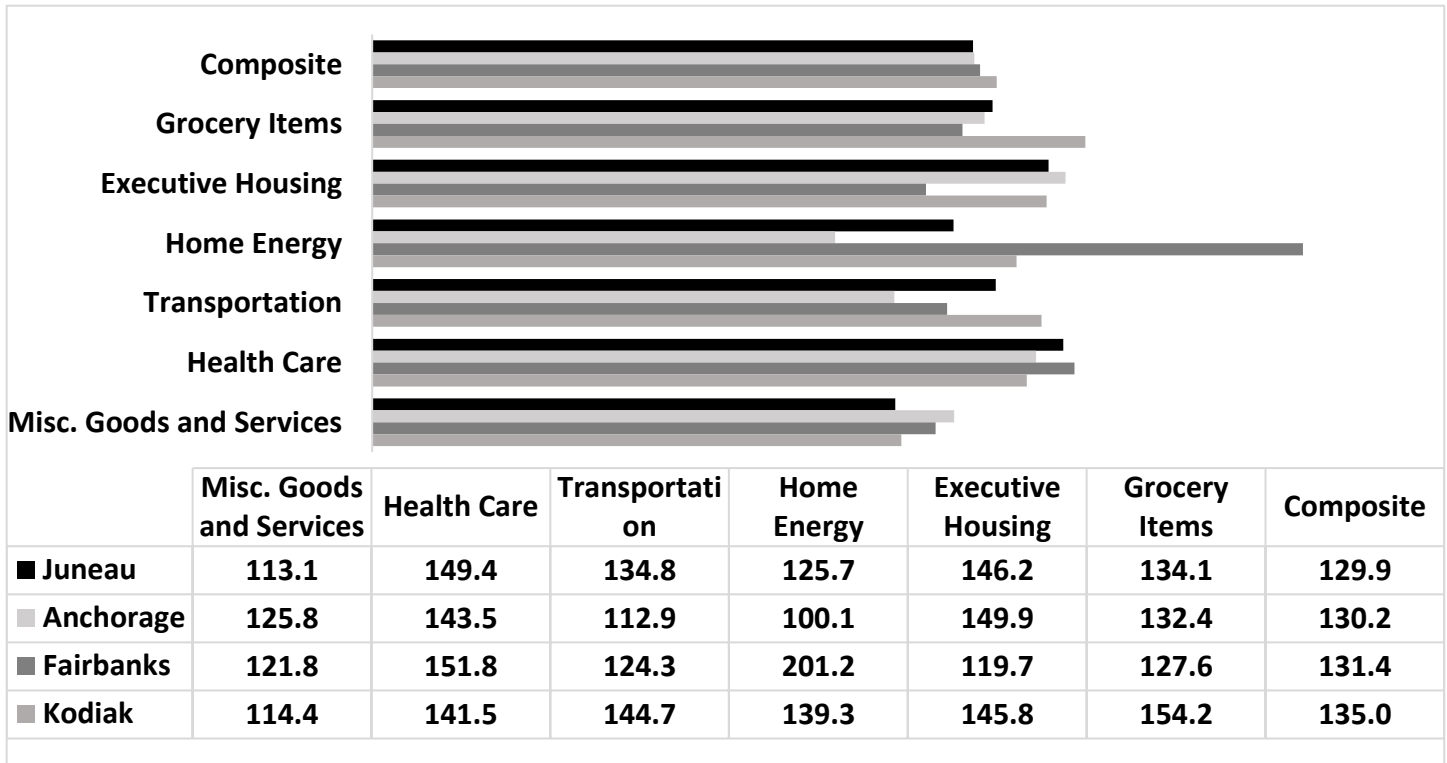
Source: Alaska Department of Revenue, Tax Division, FY2016 Shared Taxes and Fees Annual Report

Cost of Living

Cost of Living Index

The Cost of Living Index is a nationwide survey of living expenses conducted three times in a year in 264 U.S. cities. It establishes the average cost of living in the U.S. based on the cost of consumer goods, services, housing, energy, health care and transportation for a moderately affluent professional or executive household. The average cost for all communities is set at 100. Juneau’s average composite score was 129.9 for 2016, which means Juneau is approximately 29 percent more expensive than the national average. Alaska’s capital city has a cost of living on par with Anchorage and slightly less expensive than Fairbanks. While Anchorage has higher housing costs than Juneau, and Fairbanks has much lower housing costs, the cost of home energy is very high in Fairbanks and relatively inexpensive in Anchorage.

Figure 72: Comparative Cost of Living Index for Select Communities, 2016 Annual Average



Source: Council for Community and Economic Research (C2ER), Cost of Living Index, Second Quarter 2016; Note: National average for 264 urban areas = 100.

Military Cost of Living Index

The Department of Defense gives a Cost of Living Allowance (COLA) to compensate active duty military personnel who are assigned to overseas duty stations (including Alaska and Hawaii) with above average prices for goods and services. COLA is determined by a survey of the cost of approximately 120 goods and services in a community compared to the same goods and services in the continental U.S. COLA is adjusted down in communities where military personnel shop at base commissaries and exchanges, as in Anchorage and Fairbanks. In general, the higher the proportion of on-base shopping, the lower the index. According to the August

2017 COLA allowance, Juneau was 38 percent more expensive for goods and services compared to the average continental U.S military location.

Figure 73: US Military Overseas COLA Adjustment for Select Alaska Communities, August 16, 2015, 2016, 2017

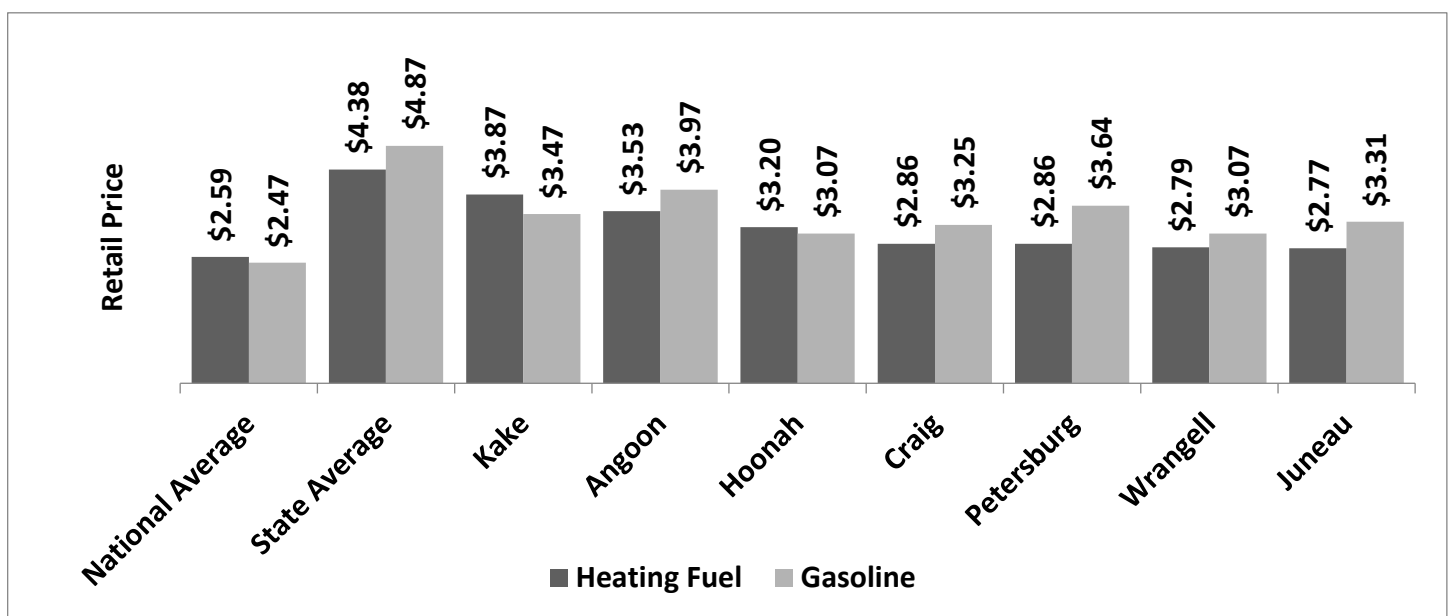
Community	2015 Percent	2016 Percent	2017 Percent	Community	2015 Percent	2016 Percent	2017 Percent
Juneau	132%	140%	138%	Ketchikan	136%	136%	130%
Anchorage	118%	128%	128%	Petersburg	142%	148%	140%
Fairbanks	120%	128%	132%	Sitka	140%	142%	136%

Source: U.S. Department of Defense, Overseas COLA Calculator

Fuel Oil and Gasoline Costs

The Alaska Department of Commerce, Community and Economic Development collects retail heating fuel and gasoline prices from 100 select communities across Alaska semiannually. In July 2017, the state-wide average heating fuel price for all surveyed communities (excluding the Northern Region where prices are subsidized) was \$4.38; whereas, the U.S. national average was \$2.59 (July 2017). The average state-wide survey price of gasoline was \$4.87 per gallon, as compared to the national average gasoline price of \$2.47. For Juneau, the heating fuel price remained flat and the gasoline price rose by almost 17 percent between July 2016 and July 2017. However, heating fuel in Juneau costs 37 percent less than the statewide average (excluding North Slope Borough subsidized communities) and gasoline prices are 32 percent less than the statewide average. The relatively shorter distances to fuel distribution centers and year-round marine access contribute to Southeast’s lower prices.

Figure 74: Heating Fuel and Gasoline Prices of Select Southeast Cities, July 2017



Source: Alaska Department of Commerce, Community, and Economic Development, Division of Community and Regional Affairs, Alaska Fuel Price Report – July 2017.