



***Juneau Visitor Profile
and Economic Impact Study
2016***

Prepared for:
Travel Juneau

October 2017



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Prepared for:
Travel Juneau

Prepared by:



McDowell Group Anchorage Office

1400 W. Benson Blvd., Suite 510
Anchorage, Alaska 99503

McDowell Group Juneau Office

9360 Glacier Highway, Suite 201
Juneau, Alaska 99801

Website: www.mcdowellgroup.net

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Executive Summary

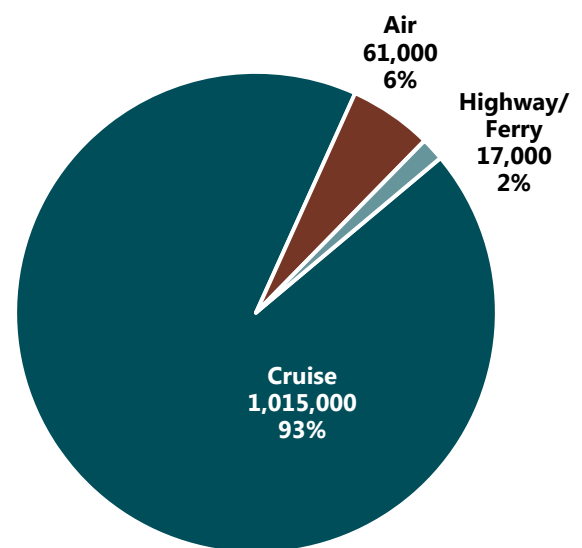
Travel Juneau contracted with McDowell Group to profile summer 2016 visitors to Juneau based on data from the recently completed *Alaska Visitor Statistics Program 7 (AVSP)*. AVSP is a statewide survey of Alaska visitors commissioned by the Alaska Department of Commerce, Community, and Economic Development and the Alaska Travel Industry Association. AVSP 7 included surveys of 2,525 out-of-state travelers who visited Juneau, either for a day or overnight visit, between May and September 2016. This report also estimates economic impacts resulting from Juneau’s visitor industry, for calendar year 2016.

Visitor Volume

- An estimated 1,093,000 out-of-state visitors came to Juneau between May and September 2016 – part of a record breaking year for Alaska visitor volume.
- Cruise passengers dominated Juneau visitors, making up 93 percent of the total (by comparison cruise makes up 55 percent of all Alaska visitors). Six percent of Juneau visitors came to Alaska by air, and the remaining two percent traveled by highway/ferry to visit Alaska.
- Summer 2016 visitor volume represents a 19 percent increase over 2011, the date of the most recent previous AVSP. The bulk of this increase is attributable to the cruise market, which increased 19 percent (160,300 visitors). Air (+12,000 visitors) and highway/ferry (+3,600 visitors) markets also saw large increases.

Visitor Volume by Transportation Market

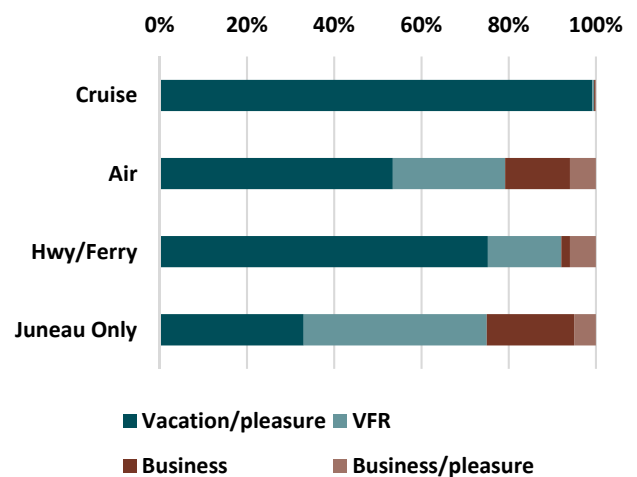
Total Visitor Volume: 1,093,000



Trip Purpose

- Nearly all Juneau cruise visitors travelled to Alaska for vacation/pleasure (99 percent).
- Three-quarters of highway/ferry and half of air visitors traveled for vacation/pleasure. More than one in five Juneau air visitors travelled for business-related reasons.
- Visiting friends/relatives (VFR) was the most common reason for visitors that only overnighted in Juneau on their Alaska trip (“Juneau Only” visitors), at 42 percent.

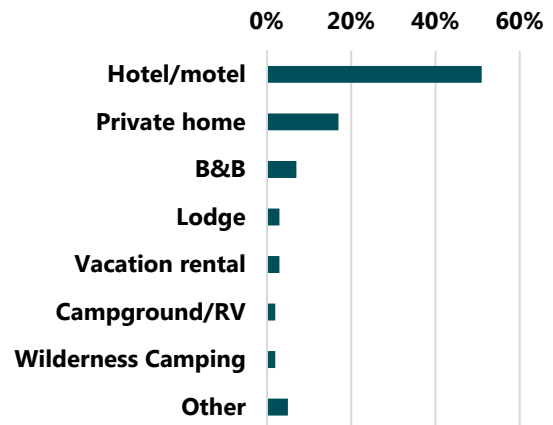
Trip Purpose by Transportation Market



Length of Stay and Lodging

- Juneau visitors stayed an average of 8.6 nights in Alaska. Highway/ferry travelers stayed the longest, on average, at almost 16 days, followed by air travelers (10.4 days) and cruise travelers (8.4 days).
- Of those that overnighted in Juneau, the average stay was 4.2 nights. Air travelers spent slightly longer in town than highway/ferry travelers (5.0 versus 3.5 nights). Juneau Only travelers stayed an average of 7.5 nights.
- The most common lodging type used by overnight Juneau visitors was hotel/motel (51 percent), followed by private home (typically with friends and relatives, 17 percent), and bed and breakfasts (7 percent). Juneau Only and air visitors were especially likely to stay with friends/relatives (43 and 22 percent, respectively). A large percentage of highway/ferry visitors stayed in campgrounds (20 percent), unlike other Juneau visitors.

Lodging Types Used by Overnight Visitors



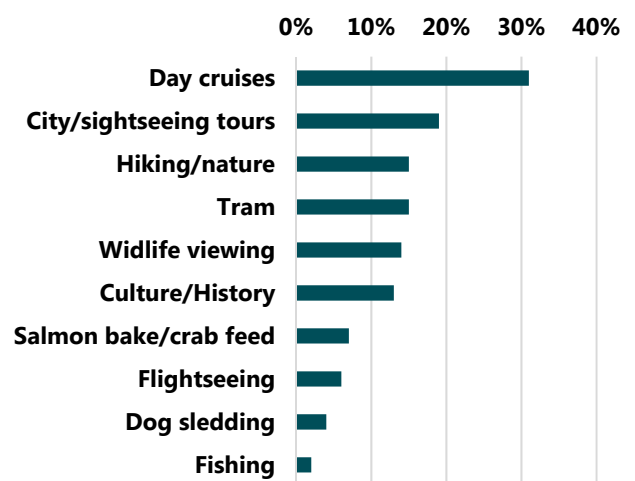
Destinations

- Cruise passengers visiting Juneau show predictable patterns of visitation elsewhere in Alaska, with nearly all also visiting Ketchikan and Skagway, and significant percentages visiting Glacier Bay, Hoonah/Icy Strait Point, Seward, Anchorage, and Denali.
- Top overnight destinations for Juneau's air visitors were Anchorage (20 percent), Gustavus (11 percent), and Skagway, Sitka, and Petersburg (7 percent). Top overnight destinations for Juneau's highway/ferry visitors were Skagway, Haines, Anchorage, Ketchikan, Kenai Peninsula, Sitka, and Petersburg (in declining order).

Activities in Juneau

- Visitor activities varied by type of traveler. Cruise passengers were most likely to participate in whale watching and other day cruises (31 percent), followed by city/sightseeing tours, tram, hiking/nature walks, and wildlife viewing. Highway/ferry visitors reported a wide range of activities, topped by hiking/nature walks, wildlife viewing, and museums. Air visitors were much more likely to go fishing (17 percent) than other markets.
- Nearly half of Juneau Only visitors reported hiking in Juneau. Other popular activities for these travelers included day cruises, tram, fishing, wildlife viewing, and museums.

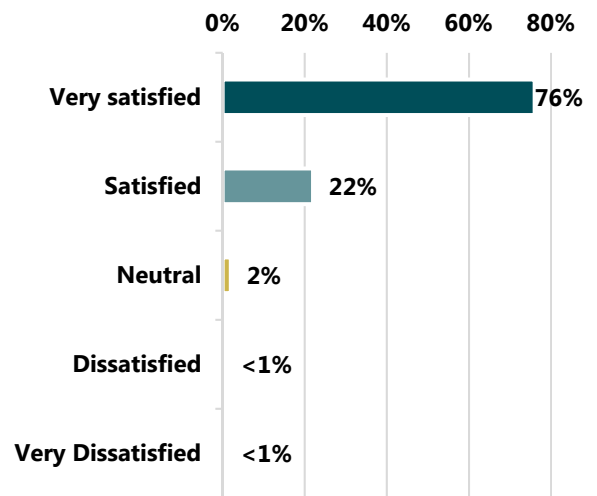
Top Visitor Activities in Juneau, All Visitors



Satisfaction Rates

- Nearly all Juneau visitors were satisfied with their Alaska trip, with only 2 percent saying they were neutral or dissatisfied. Similar levels of satisfaction were seen across travel markets.
- Two-thirds of Juneau visitors rated their Alaska trip as higher than their expectations, including nearly a third who rated their trip as *much* higher than expected. Only 3 percent rated their Alaska trip as below expectations.
- One-quarter of cruise passengers said they were very likely to return to Alaska within five years – an increase over the 22 percent of Juneau’s cruise visitors that said so in 2011.

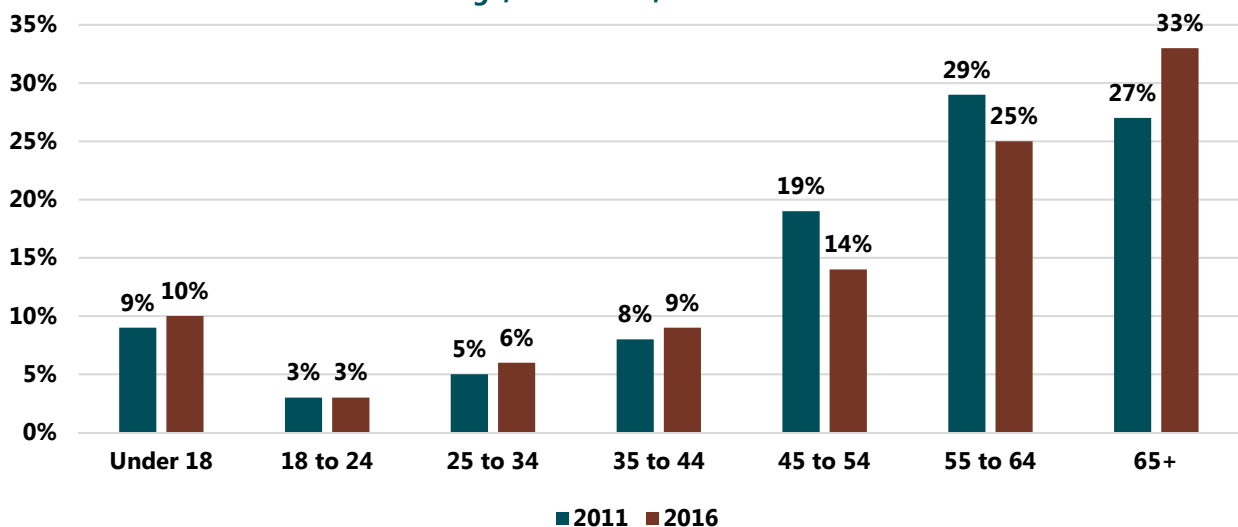
Satisfaction with Alaska Experience, All Visitors



Demographics

- U.S. residents represented 81 percent of Juneau visitors, with Western states being the most common region of origin (32 percent), followed by the South (24 percent), Midwest (15 percent), and East (11 percent). Within the West, California, Washington, Oregon, and Arizona were the most prominent states.
- The average age of Juneau visitors was 56.2 years. Juneau Only visitors were the youngest at 47.3 years, on average, while highway/ferry visitors were the oldest at 57.3 years.
- The most common age group was 65 and older (33 percent) for all travel markets. This percentage reflects an increase from 27 percent in 2011.

Visitor Age, All Visitors, 2011 and 2016



Expenditures

- Juneau visitors spent an average of \$188 per person per trip. Juneau Only visitors spent the most per trip, at \$800, followed by air (\$630) and highway/ferry (\$281). Cruise visitors spent the least at \$162.
- Spending by category also varied by travel market. The bulk of cruise visitor spending occurred in tours/activities/entertainment (\$95 per person per trip) and gifts/souvenirs/clothing (\$53). Other (non-cruise) Juneau visitors spread their spending more widely in the community.
- Lodging and food/beverage were the two largest spending categories for non-cruise Juneau visitors. Juneau Only visitors spent the most on lodging (\$246) and food/beverage (\$170), followed by tours/activities, transportation, other spending, and souvenirs. Air visitors spent an average of \$178 on lodging and \$131 food/beverage and more than \$50 in all other categories. Compared to air and Juneau Only visitors, highway/ferry visitors spent less per person in each category.

Visitor Expenditures in Juneau, Per Person, Per Trip
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Lodging	\$11	\$178	-	\$90	\$246
Tours/activities/entertainment	\$95	\$96	\$95	\$48	\$142
Gifts/souvenirs/clothing	\$53	\$53	\$53	\$28	\$71
Food/beverage	\$19	\$131	\$12	\$79	\$170
Rental cars/fuel/transportation	\$5	\$87	\$1	\$26	\$98
Other	\$6	\$85	\$1	\$11	\$74
Total	\$188	\$630	\$162	\$281	\$800

Note: Multi-day packages that occurred exclusively in Juneau are included in the "other" category.

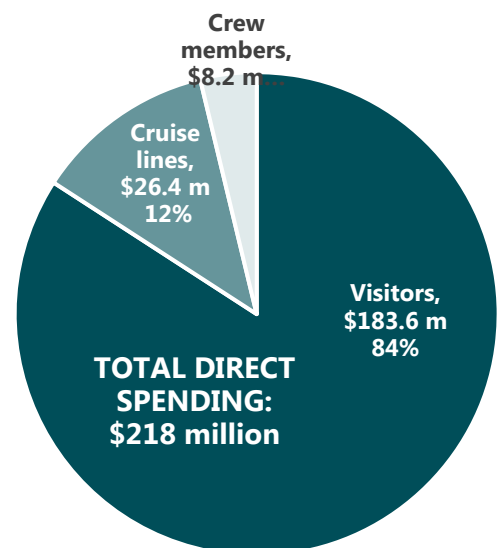
Economic Impacts

Spending in Juneau by visitors and by the businesses that serve those visitors creates jobs, income, and secondary spending throughout the local economy. This analysis describes employment and labor income effects of visitor industry-related spending in Juneau in calendar year 2016. (Impacts include spending by the estimated 17,000 out-of-state visitors that traveled to Juneau January through April and October through December, in addition to the 1,093,000 summer visitors.)

DIRECT SPENDING

Direct visitor industry spending totaled \$218 million in 2016. Visitor industry spending includes three categories: visitor spending (\$183.6 million), cruise line spending (\$26.4 million), and spending by cruise ship crew members (\$8.2 million). (Visitor spending measured by AVSP was adjusted downward to account for commissions on tours purchased through cruise lines.)

Direct Visitor Industry Spending in Juneau by Category, 2016



DIRECT EMPLOYMENT

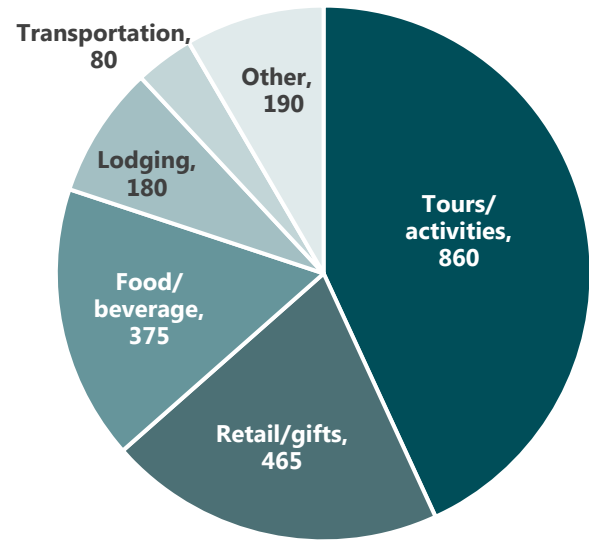
Visitor industry spending directly generated 2,150 full- and part-time jobs in Juneau, and \$77 million in labor income, based on McDowell Group’s economic impact modeling. The chart at right shows how visitor industry employment in Juneau in 2016 breaks down by economic sector, based on the distribution of visitor industry dollars. Tours/activities accounted for 40 percent of employment; retail accounted for 22 percent; food/beverage accounted for 17 percent; lodging accounted for 8 percent; transportation accounted for 4 percent; and jobs in the “other” category totaled 9 percent.

TOTAL IMPACTS

Direct employment and labor income estimates do not include jobs and income created in Juneau as the visitor dollar is re-spent by visitor industry businesses and their employees (“multiplier effects”). This secondary spending is estimated to result in 650 jobs and \$32 million in labor income during the 2016 study period. Adding secondary impacts to the initial direct impacts indicates total direct, indirect and induced impacts of 2,800 jobs and \$109 million in labor income. This estimate is a tally of the total number of full- and part-time jobs linked to non-resident visitor travel to Juneau. It includes annual average wage and salary employment, and total proprietors’ employment (the total number of sole proprietorships or partnerships active at any time during the year).

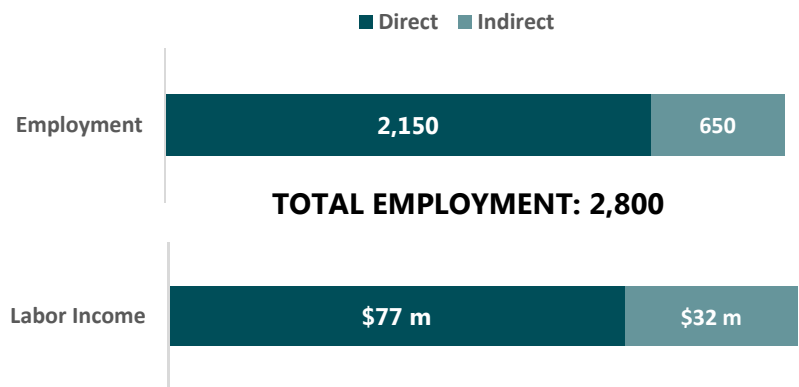
Visitor industry spending-related employment (2,800 jobs) represented roughly 12 percent of total Juneau employment (estimated at 23,398 in 2015). In terms of labor income, visitor industry spending-related labor income represented 7 percent (\$109 million) of total labor income earned in Juneau (\$1.6 billion).

Direct Visitor Industry Employment in Juneau, By Sector, 2016



**TOTAL DIRECT EMPLOYMENT:
2,150 jobs**
**TOTAL DIRECT LABOR INCOME:
\$77 million**

Direct, Indirect, and Total Employment and Labor Income Related to Visitor Industry, 2016



TOTAL LABOR INCOME: \$109 million

MUNICIPAL REVENUES

Juneau's out-of-state visitor industry generated an estimated \$13.5 million in tax revenue to the City and Borough of Juneau in 2016. The vast majority of this figure (\$10.4 million) is attributable to sales taxes, while \$0.9 million is attributable to room tax revenues, and \$2.2 million to property tax revenues. This does not include indirect or induced sales and property tax revenues attributable to the visitor industry.

CBJ also collected \$14.2 million in marine-related revenues, including \$4.6 million from State of Alaska Marine Passenger fees, \$5.0 million in CBJ Marine Passenger fees, and \$3.0 million in Port Development fees, in addition to other revenues such as lightering fees, vendor booth permit sales, and loading zone permit sales.

CBJ Tax and Marine-Related Revenues from Visitor Industry Spending, 2016

	Revenues
Tax Revenues	\$13.5 million
Sales tax revenues	\$10.4 million
Room tax revenues	\$0.9 million
Property tax revenues	\$2.2 million
Marine-Related Revenues	\$14.2 million
Docks and Harbors revenues	\$9.6 million
State Marine Passenger fees (FY16)	\$4.6 million

Introduction and Methodology

Travel Juneau contracted with McDowell Group to profile summer 2016 visitors to Juneau based on data from the recently completed *Alaska Visitor Statistics Program 7 (AVSP)*. AVSP is a statewide survey of Alaska visitors commissioned by the Alaska Department of Commerce, Community, and Economic Development and the Alaska Travel Industry Association. AVSP 7 included surveys of 2,525 out-of-state travelers who visited Juneau, either for a day or overnight visit, between May and September 2016.

This study presents results for Juneau visitors as a whole, as well as for subgroups based on the mode of travel (cruise, air, or highway/ferry) and for visitors that only visited Juneau on their Alaska trip. Additional subgroups were analyzed (for example, repeat Alaska visitors, travelers purchasing a non-cruise overnight package, and others). Significant findings associated with these subgroups are provided in the text accompanying each table.

Methodology

The AVSP visitor survey is administered to a random sample of out-of-state visitors departing Alaska at all major exit points, including airports, highways, cruise ship docks, and ferries. The survey includes questions on trip purpose, transportation modes, length of stay, destinations, lodging, activities, expenditures, satisfaction, trip planning, and demographics. The summer 2016 AVSP included surveys of 5,926 out-of-state visitors to Alaska, including 2,525 who visited Juneau. Ninety-five percent of Juneau visitor surveys were conducted in person, with the remainder filling out the survey online (survey invitation cards were distributed at Anchorage Airport). All data is weighted by transportation mode according to estimated traffic by month and location.

The table below shows how each market is defined for purposes of this study, along with their respective sample sizes and maximum margins of error. Note that the highway/ferry market includes any visitor who entered or exited *Alaska* via highway or ferry – some highway/ferry visitors may have traveled to *Juneau* via air. Likewise, the air visitor market may include some visitors who traveled to Juneau via ferry.

Sample Sizes and Margins of Error, by Travel Market

	Sample Size	Maximum Margin of Error
Cruise - Spent at least one night aboard a cruise ship during their Alaska trip.	1,904	±2.2%
Air - Entered <i>and</i> exited Alaska by highway <i>or</i> ferry; excludes cruise passengers.	496	±4.4%
Highway/Ferry - Entered <i>or</i> exited Alaska by highway <i>or</i> ferry; excludes cruise passengers.	125	±8.7%
Total	2,525	±1.95%
Juneau Only – Visitors that overnighted in Juneau, and only Juneau, on their Alaska trip. <i>Subset of the above visitors.</i>	215	±6.7%

The economic impact analysis was based on several sources and methods. Fall/winter visitation was estimated based on traffic data from Juneau International Airport enplanement data and Alaska Marine Highway System traffic data. Fall/winter spending estimates were based on AVSP 6 (2011/12) visitor spending data, adjusted for inflation.

Visitor spending was applied to visitor volume by season to arrive at total spending estimates. Two adjustments were made in this analysis: cruise passenger volume was adjusted downward slightly to account for passengers that remain on board while in port. Also, visitor spending on tours, as reported in the AVSP survey, was adjusted downward to account for tour commissions that accrue directly to cruise lines. Additional visitor industry spending (cruise line and crew member spending) was based on previous McDowell Group studies, adjusted for inflation and changes in cruise traffic. Visitor, cruise line, and crew member spending were combined to arrive at direct spending and employment impacts. McDowell Group developed a custom model for estimating multiplier effects. The econometric modeling program IMPLAN was used to estimate specific model inputs.

Visitor Volume

An estimated 1,093,000 out-of-state visitors travelled to Juneau between May and September 2016. The vast majority of these visitors (93 percent) were cruise ship passengers, though an estimated 61,000 visitors travelling to/from Alaska by air, and 17,000 by highway/ferry visited Juneau in summer 2016.

Juneau Visitor Volume, by Transportation Mode, Summer 2016

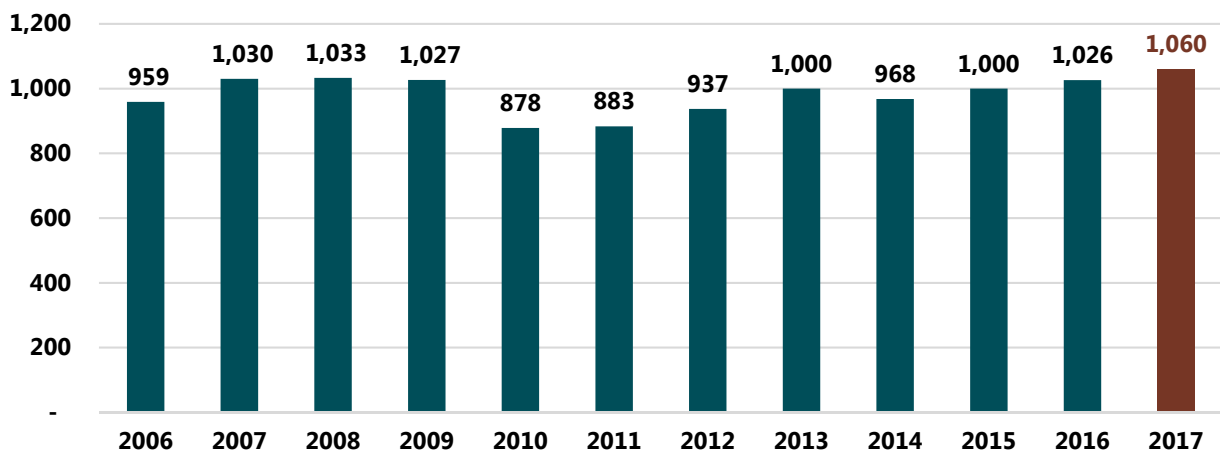
	Visitors	Percent of Total
Cruise - Spent at least one night aboard a cruise ship during their Alaska trip.	1,015,000	93%
Air - Entered <i>and</i> exited Alaska by highway <i>or</i> ferry; excludes cruise passengers.	61,000	6%
Highway/Ferry - Entered <i>or</i> exited Alaska by highway <i>or</i> ferry; excludes cruise passengers.	17,000	2%
Total	1,093,000	

Note: Percentages may not add to 100 due to rounding.

Visitation in 2016 represents a 19 percent increase over the 917,100 visitors estimated for Summer 2011.¹ The largest component of this increase was an additional 160,300 cruise travelers, though significant increases were seen for air visitors (+12,000) and highway/ferry visitors (+3,600).

Juneau's cruise visitation numbers are driven by the overall Alaska cruise market, as roughly 99 percent of Alaska cruise passengers visit Juneau. As shown in the chart below, Alaska has experienced a rebound from drops experienced in 2010 through 2012. Based on the capacity of scheduled sailings, a record 1,060,000 cruise travelers are expected to visit Alaska in 2017.

Alaska Cruise Passenger Volume, 2006-2016; 2017 Projected (Thousands)



Source: Cruise Line Agencies of Alaska. 2017 figure based on scheduled sailings.

¹ McDowell Group, 2012. *Juneau Visitor Profile: Summer 2011*. Prepared for the Juneau Convention & Visitors Bureau.

Trip Purpose and Package

Alaska Trip Purpose

Nearly all Juneau cruise visitors travelled to Alaska for the purpose of vacation/pleasure (99 percent).

Travelers to Juneau that fit into the air and highway/ferry markets, on the other hand, travelled for a wider variety of reasons. More than a quarter of air and seventeen percent of highway/ferry travelers said the main purpose of their trip was to visit friends/relatives. Fifteen percent of Juneau air visitors travelled for business.

Among Juneau Only visitors, the most common reason to travel to Alaska was to visit friends/relatives (42 percent), followed by vacation/pleasure (33 percent), business (20 percent), and business/pleasure (5 percent).

Trip Purpose (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Vacation/pleasure	96	54	99	76	33
Visiting friends or relatives	2	26	<1	17	42
Business	1	15	<1	2	20
Business and pleasure	1	6	<1	6	5

Alaska Packages

Among Juneau visitors, 17 percent of air and 7 percent of highway/ferry travelers reported participating in a multi-day package during their Alaska trip. Juneau Only visitors were roughly as likely as highway/ferry travelers to purchase multi-day packages.

Air passengers primarily purchased fishing lodge packages (66 percent), but also purchased wilderness lodge, adventure tour, and other packages. All cruise visitors are automatically considered package purchasers.

As a reminder, packages reported here are not necessarily referring to activities in Juneau and could occur anywhere in the state.

Packages (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Purchased multi-day package (including cruise)					
Yes	94	17	100	7	6
Package type (Base: non-cruise, purchased package)					
Fishing lodge	64	66	-	*	*
Wilderness lodge	12	11	-	*	*
Adventure tour	10	9	-	*	*
Motorcoach tour	2	2	-	*	*
Rail package	1	1	-	*	*
Rental car/RV package	<1	<1	-	*	*
Hunting	-	-	-	*	*

* Sample size of highway/ferry and Juneau Only visitors who purchased a multi-day package too small for analysis.

Length of Stay, Lodging, and Destinations

Length of Stay

Juneau visitors stayed an average of 8.6 nights in Alaska. Highway/ferry travelers stayed the longest, on average, at almost 16 days, followed by air travelers (10.4 days) and cruise travelers (8.4 days).

Of those that overnighted in Juneau, the average stay was 4.2 nights. Air travelers spent slightly longer in town than highway/ferry travelers (5.0 versus 3.5 nights). Juneau Only travelers stayed an average of 7.5 nights.

Length of Stay (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
1-3 nights	1	11	<1	10	20
4-7 nights	61	41	63	17	51
8-14 nights	35	32	35	36	22
15-21 nights	2	8	1	19	5
22+ nights	1	<1	<1	19	3
Average # of nights in Alaska	8.6 nights	10.4 nights	8.4 nights	15.9 nights	7.5 nights
Average # of nights in Juneau	4.2 nights	5.0 nights	*	3.5 nights	7.5 nights

* Sample size for cruise passengers overnighting in Juneau was too small for analysis.

Lodging

The most common lodging type used by overnight Juneau visitors was hotel/motel (60 percent), followed by visiting friends/relatives (20 percent), and bed and breakfasts (9 percent). Juneau Only and air visitors were especially likely to stay with friends/relatives in a private home (43 and 27 percent, respectively). A large percentage of highway/ferry visitors stayed in campgrounds (27 percent), unlike other Juneau visitors.

Lodging Types Used in Juneau (%)
Base: Overnighted in Juneau
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Hotel/motel	60	58	63	62	42
Private home	20	27	-	8	43
B&B	9	9	12	1	6
Lodge	3	4	3	<1	5
Vacation rental	3	4	-	2	7
Campground/RV	3	1	-	27	2
Wilderness camping	2	3	-	2	4
Other	6	4	17	2	4

Note: Percentages may add to more than 100 due to visitors using multiple lodging types.

In total, overnight Juneau visitors spent over a third of their nights in hotel/motels (38 percent) and private homes (36 percent). Other lodging types accounted for much smaller percentages of total overnights, including vacation rentals (6 percent), wilderness camping (5 percent), and others.

Cruise travelers that overnights in Juneau spent the highest percentage of nights in hotel/motels (67 percent). Nearly a third (30 percent) of nights spent in Juneau by highway/ferry visitors were spent in a campground/RV. Juneau Only visitors spent roughly a half of their nights in Juneau staying with friends/family in a private home.

Percentage of Nights Spent in Each Lodging Type, By Travel Market (%)
Base: Overnights in Juneau
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Hotel/motel	38	35	67	45	28
Private home	36	39	-	16	48
B&B	4	4	12	1	3
Lodge	4	4	2	-	5
Vacation rental	6	6	-	3	8
Campground/RV	3	1	-	30	2
Wilderness camping	5	6	-	3	3
Other	4	4	19	1	3

Destinations

The table on the following page details where Juneau visitors traveled on their Alaska trip, whether for day or overnight visits. Cruise passengers show predictable patterns of visitation, with nearly all visiting Ketchikan and Skagway, and significant percentages visiting Glacier Bay, Hoonah/Icy Strait Point, Seward, Anchorage, and Denali.

Juneau air travelers were most likely to also visit Anchorage (24 percent). Within Southeast Alaska, Gustavus (15 percent) was the most visited other destination, followed by Glacier Bay, Sitka, and Skagway.

Highway/ferry travelers visited the widest range of Alaska communities. Over half of Juneau's highway/ferry travelers also visited Ketchikan and Skagway, as well as Southcentral and Interior Alaska.

The subsequent table shows just the overnight destinations visited by Juneau travelers. Note that only 82 percent of air travelers and 74 percent of highway/ferry travelers overnights in Juneau. The rest likely visited Juneau briefly on the way to other destinations. Top overnight destinations for Juneau's air visitors were Anchorage (20 percent), Gustavus (11 percent), and Skagway, Sitka, and Petersburg (7 percent). Top overnight destinations for Juneau's highway/ferry visitors were Skagway, Haines, Anchorage, Ketchikan, Kenai Peninsula, Sitka, Petersburg, and Gustavus (in declining order).

Destinations Visited (Day or Overnight) (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry
Southeast	100	100	100	100
Juneau	100	100	100	100
Ketchikan	92	9	97	53
Skagway	77	10	81	52
Glacier Bay Nat'l Park	46	12	49	8
Hoonah/Icy Strait Point	21	4	23	2
Sitka	13	10	13	18
Haines	6	8	5	49
Gustavus	1	15	<1	18
Petersburg	1	9	<1	25
Wrangell	1	3	<1	19
Prince of Wales Is.	<1	1	<1	-
Other Southeast	1	10	<1	5
Southcentral	33	26	33	47
Anchorage	28	24	29	46
Kenai Peninsula	19	12	20	26
Seward	18	8	18	17
Homer	2	6	2	23
Kenai/Soldotna	1	3	<1	18
Other Kenai Peninsula	1	4	1	10
Whittier	8	4	8	6
Talkeetna	8	6	8	20
Girdwood/Alyeska	2	5	2	7
Palmer/Wasilla	2	7	1	22
Portage	1	2	1	5
Prince William Sound	1	3	1	4
Valdez	1	5	1	12
Cordova	<1	3	<1	<1
Other Southcentral	1	3	1	3
Interior	20	15	20	44
Denali Nat'l Park	19	12	20	28
Fairbanks	11	7	11	29
Copper Center	1	1	1	3
Healy	1	1	<1	13
Glennallen	<1	3	<1	12
Tok	<1	2	<1	26
Delta Junction	<1	1	<1	22
Chicken	<1	1	<1	7
Other Interior	<1	2	<1	7
Southwest	1	3	1	2
Far North	<1	1	<1	4

TABLE 1.4 – Overnight Destinations (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry
Southeast	8	96	2	94
Juneau	7	82	1	74
Skagway	2	7	1	46
Ketchikan	1	6	<1	28
Sitka	1	7	<1	15
Gustavus	1	11	<1	12
Haines	1	5	<1	39
Petersburg	1	7	<1	13
Glacier Bay Nat'l Park	<1	4	<1	6
Wrangell	<1	3	-	8
Hoonah/Icy Strait Point	<1	2	-	2
Prince of Wales Is.	<1	<1	-	-
Other Southeast	<1	8	-	-
Southcentral	23	25	23	38
Anchorage	21	20	21	37
Talkeetna	5	2	5	16
Kenai Peninsula	4	11	3	25
Seward	3	7	3	16
Homer	1	5	<1	17
Kenai/Soldotna	<1	2	<1	15
Other Kenai Peninsula	1	2	<1	7
Girdwood/Alyeska	1	2	1	5
Palmer/Wasilla	1	2	1	9
Valdez	1	5	<1	12
Whittier	<1	-	<1	4
Cordova	<1	2	<1	<1
Prince William Sound	<1	<1	-	3
Portage	<1	<1	<1	2
Other Southcentral	1	3	1	2
Interior	19	13	20	42
Denali Nat'l Park	19	9	19	26
Fairbanks	11	6	11	28
Copper Center	1	<1	1	2
Healy	<1	1	<1	4
Glennallen	<1	2	<1	7
Tok	<1	1	<1	19
Delta Junction	<1	<1	<1	8
Southwest	<1	2	<1	2
Far North	<1	<1	<1	3

Visitor activities varied by type of traveler. Cruise passengers were most likely to participate in whale watching and other day cruises (31 percent), followed by city/sightseeing tours, riding the tram, hiking/nature walking, and wildlife viewing. Highway/ferry travelers reported a wide range of activities, topped by hiking/nature walking, wildlife viewing, and museums. Air visitors were much more likely to report fishing (17 percent) than other markets.

Nearly half of Juneau Only visitors reported hiking in Juneau. Other popular activities for these travelers included day cruises, tram, fishing, wildlife viewing, and museums.

Shopping was only captured at the statewide level and is not shown in the table below. The vast majority of Juneau visitors (84 percent) reported shopping in Alaska. It is likely most of these visitors also shopped in Juneau. Juneau's cruise passengers were the most likely to report shopping in Alaska (85 percent), with fewer air and highway/ferry passengers doing so (64 and 68 percent, respectively).

TABLE 1.6 Activities in Juneau (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Day cruises	31	21	31	16	30
City/sightseeing tours	19	13	19	10	17
Hiking/nature walk	15	31	14	29	44
Tramway/gondola	15	21	15	11	29
Wildlife viewing	14	25	13	28	27
Birdwatching	3	8	3	7	8
Culture/History	13	18	13	31	24
Museums	8	14	8	24	19
Historical/cultural attractions	3	4	3	8	4
Gold panning/mine tour	2	3	2	5	3
Native cultural tours/act.	2	2	1	8	4
Salmon bake/crab feed	7	3	8	2	4
Flightseeing	6	7	6	9	8
Dog sledding	4	<1	4	<1	<1
Fishing	2	17	1	5	28
Guided	2	7	1	2	11
Unguided	1	12	-	3	21
Kayaking/canoeing	2	4	2	2	2
Zipline	1	1	1	2	3
Biking	1	2	1	5	4
Shows/Alaska entertainment	1	1	1	5	2
Rafting	1	<1	1	<1	<1
Camping	<1	3	-	13	6
ATV/4-wheeling	<1	1	<1	-	2
Other	<1	<1	<1	2	1

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

Satisfaction Ratings

In general, Juneau visitors reported high levels of satisfaction, similar to those reported by Alaska visitors overall. Satisfaction ratings were only asked for visitors' Alaska trip as a whole; satisfaction with individual communities was not measured.

Satisfaction with Overall Experience

Nearly all Juneau visitors were satisfied with their Alaska trip, with only 2 percent saying they were neutral or dissatisfied. Similar levels of satisfaction were seen across travel markets.

Satisfaction with Overall Alaska Experience (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
5 - Very satisfied	76	76	76	74	70
4 - Satisfied	22	23	21	22	29
3 - Neither/neutral	2	1	2	1	1
2 - Dissatisfied	<1	<1	<1	2	-
1 - Very dissatisfied	<1	<1	-	<1	-

Compared to Expectations

Two-thirds of Juneau visitors rated their Alaska trip as higher than their expectations, including nearly a third who rated their trip as *much* higher than expected. Only 3 percent rated their Alaska trip as below expectations.

Highway/ferry and Juneau Only visitors were slightly less likely to rate their trip as higher than expectations, with roughly two in five saying it was about as expected.

Alaska Trip Compared to Expectations (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
5 - Much higher than expectations	30	26	31	23	22
4 - Higher than expectations	36	36	36	36	34
3 - About what you expected	31	35	31	40	42
2 - Below expectations	2	2	2	<1	2
1 - Far below expectations	1	<1	1	<1	-

Note: Business visitors were screened out of this question.

Value for the Money

More than four in ten (42 percent) Juneau visitors rated their Alaska trip as a better value for the money compared than other destinations. Similar numbers of Juneau visitors (45 percent) rated their Alaska trip as about the same value as other destinations. Thirteen percent said Alaska was a worse value for the money.

Highway/ferry (30 percent) and air visitors (20 percent) were more likely than cruise passengers to say their Alaska trip was a worse value for the money compared to other destinations.

Value for the Money Compared to other vacation destinations visited in the past five years (%) Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
5 - Much better	17	13	17	12	13
4 - Better	25	25	26	22	25
3 - About the same	45	42	45	36	40
2 - Worse	11	18	11	29	21
1 - Much worse	2	2	2	1	-

Note: Business visitors were screened out of this question.

Recommending Alaska

Nearly all Juneau visitors (98 percent) said they were likely to recommend Alaska to friends and family. Juneau Only visitors were slightly less enthusiastic about recommending Alaska: 68 percent said they were very likely to do so, compared to 80 percent of the total Juneau market.

Likelihood of Recommending Alaska to Friends/Family (%) Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Very likely	80	75	80	79	68
Likely	18	21	17	19	27
Unlikely	1	1	1	-	1
Very unlikely	<1	<1	<1	<1	-
Don't know	1	2	1	1	2

Previous and Future Alaska Travel

Previous Alaska Travel

About three-quarters of Juneau visitors were on their first trip to Alaska. Compared to cruise visitors, Juneau Only, air, highway/ferry visitors were much more likely to have visited Alaska previously (63, 60, and 44 percent, respectively, compared to only 26 percent of cruise passengers).

Of those that had travelled to Alaska before, they had been an average of 2.7 times for vacation. The average number of previous trips was highest for air visitors (5.3 trips) and Juneau Only visitors (4.5 trips).

Roughly one in five (19 percent) Juneau visitors reported visiting Alaska by cruise ship previously. Not surprisingly, this rate was slightly higher for Juneau's cruise passengers at 20 percent, but 12, 7, and 4 percent of air, highway/ferry, and Juneau Only visitors had done so, respectively.

Previous Alaska Travel (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
First trip to Alaska	71	40	74	56	37
Been to Alaska before	29	60	26	44	63
Average # of vacation trips (base: repeat travelers)	2.7	5.3	2.4	3.8	4.5
Been on Alaska cruise before	19	12	20	7	4

Returning to Alaska

One-quarter of cruise passengers said they were very likely to return to Alaska within five years – an increase over the 22 percent of Juneau's cruise visitors that said so in 2011.

Other visitor markets were even more likely to return, likely due in large part to a higher portion of VFR travelers in these other markets. Over half of air and Juneau Only visitors and more than one-third of highway/ferry visitors reported being very likely to return to Alaska within five years.

Likelihood of Returning to Alaska in Next Five Years (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Very likely	27	56	25	35	58
Likely	21	25	20	33	25
Unlikely	33	11	35	16	10
Very unlikely	10	2	10	6	<1
Don't know	9	5	9	10	6

Juneau visitors who said they were *very likely* to return to Alaska within five years were asked what activities they were most interested in experiencing on their next Alaska trip. Responses varied substantially by travel market.

Cruise visitors reported a wide range of interests for their next Alaska trip, with more than 10 percent listing wildlife viewing, fishing, northern lights, Denali, flightseeing, and a cruise. On the other hand, air and Juneau Only visitors primarily listed fishing (35 and 30 percent, respectively) or visiting friends/family (15 and 27 percent, respectively).

Most interested in experiencing on your next Alaska trip (%)
Base: Very likely to return to Alaska within five years
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Juneau Only
Wildlife viewing	14	7	15	2
Fishing	13	35	10	30
Northern Lights	12	7	12	9
Denali	10	4	11	2
Flightseeing	10	2	11	4
Cruise	9	3	10	3
Hiking	6	3	6	3
Glaciers	4	3	4	4
Visit friends/family	3	15	2	27
Camping	3	3	3	5
Train	2	<1	2	-
Adventure	2	1	2	-
Native cultures	1	1	1	2
Arctic	1	1	1	1
Other	5	10	4	6
Don't know	5	4	6	3

Note: The sample size for highway/ferry Juneau visitors very likely to return to Juneau within five years was too small for analysis.

Trip Planning Timeline

Juneau visitors decided to come to Alaska an average of 8.7 months before their trip. Juneau Only visitors made their travel decisions the closest to their trip (5.3 months), and highway/ferry travelers planned the longest ahead of time (9.2 months).

Juneau visitors booked major travel arrangements for their Alaska trip an average of 6.4 months in advance of their trip. This average lead time was longest for cruise travelers (6.6 months).

Trip Planning Timeline by Number of Months (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
How far in advance did you decide to come on this trip to Alaska?					
Less than 1 month	4	12	3	7	16
1-3 months	14	26	14	18	31
4-6 months	29	26	29	32	27
7-11 months	19	9	20	6	7
12 or more months	33	26	34	36	17
Don't know	1	2	1	-	2
Average # of months	8.7 months	6.9 months	8.8 months	9.2 months	5.3 months
How far in advance did you book your major travel arrangements?					
Less than 1 month	5	15	5	16	19
1-3 months	19	37	18	27	42
4-6 months	35	28	35	33	25
7-11 months	21	7	22	10	5
12 or more months	17	9	17	4	3
Did not book anything	2	3	2	10	5
Don't know	2	2	2	2	2
Average # of months	6.4 months	4.3 months	6.6 months	3.8 months	3.1 months

Highway/ferry travelers, on average, waited the longest between trip decision and booking major arrangements (5.4 months in between, compared to 2.2 to 2.6 months for other Juneau visitors).

Trip planning and booking can also be presented by quarter, by applying number of months to the survey completion month (see table, next page).

The most common period for trip decisions was January through March 2016 (23 percent), though more than 15 percent decided before July 2015, from July through September 2015, and from April to June 2016. Juneau Only and air visitors were the most likely to decide later, with 48 and 39 percent, respectively, deciding after April 2016.

The most common period to book major travel arrangements was also January through March 2016 (29 percent). More than 50 percent of air, highway/ferry, and Juneau Only visitors booked their major arrangements after April 2016. This compares with only 28 percent of Juneau's cruise visitors.

Trip Planning Timeline by Quarter (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
How far in advance did you decide to come on this trip to Alaska?					
Before July 2015	18	11	18	21	6
July-Sept 2015	19	16	19	15	11
Oct-Dec 2015	20	12	21	9	13
Jan-Mar 2016	23	21	23	32	22
Apr-Jun 2016	15	24	14	18	27
July-Sept 2016	5	15	5	5	21
How far in advance did you book your major travel arrangements?					
Before July 2015	8	3	9	2	1
July-Sept 2015	15	7	15	2	2
Oct-Dec 2015	19	10	19	9	9
Jan-Mar 2016	29	25	29	32	23
Apr-Jun 2016	21	37	20	34	40
July-Sept 2016	8	18	8	21	25

Internet Usage

Overall, nearly two-thirds of Juneau visitors (62 percent) reported using the internet to plan their Alaska trip, including 49 percent who booked online. Internet usage varied by travel market. While more than three-quarters of air and highway/ferry visitors reported using the internet to plan or book their Alaska trip, less than two-thirds of Juneau cruise visitors did so.

Air travelers were the most likely to use the internet to both research and book travel (73 percent), while nearly one-third of highway/ferry visitors only used the internet for research. Juneau Only visitors also researched and booked their travel online at a high rate (67 percent).

Internet Usage for Trip Planning/Booking (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Used internet	62	78	61	82	72
Research only	13	5	13	30	5
Research and book	49	73	48	52	67
Did not use internet	35	16	37	11	17
Don't know	3	6	3	6	10

Among visitors who booked online, the most common trip components booked online were airfare (34 percent), cruises (33 percent), tours (20 percent), and lodging (14 percent).

Almost one-third of highway/ferry visitors that booked online reported booking airfare online. Some of this air travel likely represents air travel within Alaska (21 percent used air as an in-state travel mode), while the rest is likely due to those visitors that flew one way and travelled by highway or ferry the other way.

Juneau Only visitors primarily book airfare online; 24 percent also booked lodging, and 15 percent booked rental vehicles online.

Trip Components Booked Online, Including via Apps (%)
Base: Booked some portion of trip online
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Airfare	34	70	32	27	66
Cruise	33	3	36	-	-
Tours	20	14	20	14	7
Lodging	14	33	13	33	24
Vehicle rental	4	17	3	9	15
Overnight packages	2	2	1	3	<1
Ferry	1	10	<1	44	2

The top websites visited by internet users were cruise and airline websites, Trip Advisor, Google, and Expedia. Over half of cruise visitors booked travel through cruise line websites, and 40 percent booked travel through airline websites. Seventy percent of air and Juneau Only visitors used airline websites to book travel. Highway/ferry travelers researched and booked through the websites listed below at lower rates than other visitors.

Top Websites/Apps Used to Plan/Book (%)
Base: Used the internet to plan or book any portion of Alaska trip
Juneau Visitors, Summer 2016

	All Visitors		Air		Cruise		Hwy/Ferry		Juneau Only	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Cruise line websites	62	50	5	4	67	54	4	2	1	-
Airline websites	42	42	70	70	40	40	21	22	68	70
Trip Advisor	27	3	21	4	28	3	25	9	16	3
Google	27	2	22	3	28	2	44	9	20	3
Expedia	14	8	16	10	14	8	14	5	16	12
CruiseCritic.com	12	1	1	-	12	2	-	-	-	-
Tour company websites	10	6	10	9	10	6	15	4	4	1
Hotel/lodge/RV Park	9	7	18	14	8	6	16	13	11	9
Travelocity	9	2	4	1	9	2	4	4	4	3
CVB/Chamber	8	-	4	-	9	-	10	-	-	-
Facebook	8	<1	4	<1	9	<1	8	-	3	-
Priceline	6	1	3	2	6	1	2	<1	2	1
Hotels.com	5	2	7	3	5	2	5	3	5	2
AAA.com	5	2	2	1	5	2	18	1	2	-
AMHS	4	2	14	11	2	<1	74	48	6	3
Yelp	4	<1	5	1	4	<1	4	-	4	<1
Booking.com	4	3	5	6	3	2	13	12	3	1
Car/RV rental websites	4	3	12	12	3	2	7	5	8	8
Orbitz	3	1	3	2	3	1	2	-	4	3
Kayak.com	3	1	3	2	3	1	5	2	6	4
Alaska App	3	<1	8	3	2	<1	12	4	5	3
AirBnB	2	1	6	5	2	<1	6	6	5	5

Travel Agent Usage

Over one-half of Juneau visitors reported using a travel agent for trip planning or booking. Cruise visitors were the most likely to use a travel agent (54 percent). Only 5 to 14 percent of other travelers used a travel agent.

Internet Usage for Trip Planning/Booking (%) Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Booked through travel agent	51	10	54	14	5
Did not book through travel agent	46	86	43	85	90
Don't know	3	4	3	-	5

Cruise visitors that used a travel agent were most likely to book cruises through the agent, followed by airfare, tours, lodging, and other components.

Trip Components Booked through a Travel Agent (%) Base: Booked any trip component through travel agent Juneau Visitors, Summer 2016

	Cruise
Cruise	49
Airfare	32
Tours	22
Lodging	17
Overnight packages	5
Vehicle Rental	1
Ferry	<1

Note: Sample size of air, highway/ferry, and Juneau Only visitors that booked through a travel agent too small for analysis.

Usage of State of Alaska Information Sources

Nearly one out of five Juneau visitors (18 percent) used www.travelalaska.com in their trip planning. The rate was highest among highway/ferry visitors (38 percent), with 17 to 23 percent of other visitors doing so.

One out of ten Juneau visitors (11 percent) reported receiving the State of Alaska Official Vacation Planner. Highway/ferry visitors were almost three times as likely to receive the planner as other Juneau visitors.

Usage of State of Alaska Information Sources (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Did you visit the official State of Alaska travel website travelalaska.com?					
Yes	18	23	17	38	18
No	77	73	78	53	79
Don't know	5	4	5	7	3
Did you receive the State of Alaska Official Vacation Planner?					
Yes	11	11	11	29	6
No	83	85	83	68	90
Don't know	5	2	5	3	2

Usage of Other Information Sources

After visitors were asked about the internet, travel agents, and State of Alaska information sources, they were shown a list of other sources and asked which were used in planning their Alaska trip. The most common source was friends/family, mentioned by half of visitors (49 percent). Other common sources included cruise line, prior experience, brochures, and AAA.

Responses varied widely by travel market. Highway/ferry visitors were the most likely to use a number of sources, including brochures, AAA, travel/guide books, convention and visitors bureaus, magazines, and the Milepost. More than one-third of cruise visitors consulted with cruise lines. Brochures were the most commonly used printed other information sources for air and Juneau Only visitors.

Usage of Other Information Sources, not including Online Sources (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Friends/family	49	52	49	51	55
Cruise line	36	2	38	1	<1
Prior experience	16	29	16	27	31
Brochures (net)	14	16	13	40	12
Brochures	12	12	12	24	8
Community brochures	1	3	1	14	3
Ferry brochure/schedule	1	4	1	24	2
AAA	10	5	10	19	3
Tour company	6	4	6	1	1
Other travel/guide book	6	7	5	28	3
Television	5	2	5	3	2
Magazine	4	6	4	12	4
Library	3	3	3	5	<1
Club/organization/church	3	1	3	<1	1
Newspaper	2	3	2	9	4
Convention & Visitor Bureau(s)	2	2	2	11	<1
Hotel/lodge	2	4	2	13	3
Milepost	1	4	1	39	2
North to Alaska guide	1	<1	1	9	<1
Travel/recreation exhibitions	1	1	1	6	1
None	16	19	16	11	21
Don't know	3	3	3	1	3

Demographics

U.S. residents represented 81 percent of Juneau visitors, with Western states being the most common region of origin (32 percent), followed by the South (24 percent), Midwest (15 percent), and East (11 percent). Within the West, California, Washington, Oregon, and Arizona were the most prominent states. About one-quarter of Juneau visitors were from Southern US states, particularly Texas and Florida. An additional 9 percent of visitors were from Canada, and the remaining 10 percent from other countries (mostly in Europe or Australia/New Zealand).

Residents of Western U.S. states made up 30 percent of Juneau’s cruise visitors, but 61 percent of Juneau Only, 58 percent of air, and 43 percent of highway ferry visitors.

Origin (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
United States	81	92	80	69	95
Western US	32	58	30	43	61
California	13	16	13	11	12
Washington	6	16	5	1	20
Arizona	3	5	3	5	5
Oregon	2	7	2	9	8
Colorado	2	3	2	5	3
Nevada	2	2	2	<1	3
Utah	1	3	1	2	5
Idaho	1	2	1	3	3
New Mexico	1	-	1	1	-
Hawaii	<1	2	<1	-	1
Wyoming	<1	<1	<1	1	<1
Montana	<1	2	<1	5	1
Southern US	24	16	24	9	18
Texas	5	4	6	4	4
Florida	5	3	5	3	5
Tennessee	2	1	2	-	1
North Carolina	1	2	1	-	2
Virginia	1	1	1	-	<1
Georgia	1	1	1	-	-
Missouri	1	1	1	1	2
Arkansas	1	1	1	<1	<1
Kentucky	1	<1	1	-	1
Louisiana	1	1	1	-	1
Alabama	1	-	1	-	-
South Carolina	1	1	1	-	1
Mississippi	1	1	1	-	-
West Virginia	<1	<1	<1	-	-

(table continued next page)

Origin (continued) (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Midwestern US	15	10	15	13	9
Ohio	3	<1	3	-	<1
Illinois	2	1	2	6	2
Minnesota	2	2	2	4	1
Michigan	2	1	2	<1	1
Oklahoma	1		1		
Indiana	1	1	1	2	<1
Wisconsin	1	2	1	1	2
Iowa	1	1	1	-	1
Nebraska	1	1	1	-	-
Kansas	1	1	1	<1	<1
South Dakota	<1	-	<1	<1	-
North Dakota	<1	<1	<1	-	-
Eastern US	11	8	11	3	7
New York	3	3	3	<1	3
Pennsylvania	2	3	2	1	1
New Jersey	2	1	2	2	1
Maryland	1	<1	1	-	<1
Massachusetts	1	<1	1	<1	1
Maine	1	<1	1	-	<1
Vermont	<1	<1	<1	-	<1
Connecticut	<1	1	<1	<1	<1
Washington DC	<1	-	<1	<1	-
Rhode Island	<1	-	<1	-	-
New Hampshire	<1	-	<1	-	-
Delaware	<1	-	<1	-	-
Canada	9	1	9	14	2
British Columbia	5	1	5	2	<1
Ontario	2	<1	2	4	1
Alberta	1	<1	1	<1	-
Yukon	<1	-	-	7	-
Other International	10	6	10	17	2
Australia/New Zealand	5	1	5	1	-
Europe	3	3	3	16	1
United Kingdom	2	1	2	3	1
Germany	1	1	<1	6	-
Asia	1	1	1	-	<1
Latin America	1	1	1	<1	<1

Party Size

Party size refers to the number of people traveling together and sharing expenses. The average party size for Juneau visitors was 2.5 people (ranging from 2.1 for Juneau Only visitors to 2.6 for cruise passengers).

Couples represented nearly two-thirds of all parties, though this ranged from 37-40 percent of air and Juneau Only parties to 66-68 percent of cruise and highway/ferry parties.

Party Size (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
1	8	35	7	15	40
2	64	40	66	68	37
3	8	10	8	9	11
4	11	7	11	4	4
5+	9	8	9	4	8
Average party size	2.5 people	2.2 people	2.6 people	2.2 people	2.1 people

Group Size

Group size refers to the number of people travelling together regardless of expense sharing. The average group size for Juneau visitors was 4.9 people, or nearly double the average party size.

The largest groups were seen among cruise visitors, with 21 percent of cruise parties travelling in groups of six or more. This is compared to only 8 to 9 percent of other parties.

Two-person parties were the most common group size for all subgroups, and especially common among highway/ferry travelers (59 percent were couples). Solo travelers made up a small percentage of cruise travelers (4 percent) but large percentages of Juneau Only (31 percent) and air (28 percent) visitors.

Group Size (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
1	5	28	4	13	31
2	48	37	48	59	39
3	7	12	7	10	12
4	15	10	16	7	6
5	4	4	4	2	4
6-10	12	6	13	5	4
11+	9	3	9	4	4
Average group size	4.9 people	3.2 people	5.1 people	2.9 people	3.1 people

Age and Gender

Gender composition of Juneau visitors varied by travel market. Cruise and highway/ferry visitors were more likely to be female (56 and 51 percent, respectively), while air and Juneau Only visitors were more likely to be male (57 and 53 percent, respectively).

The average age of Juneau visitors was 56.2 years. Juneau Only visitors were the youngest at 47.3 years, on average, while highway/ferry visitors were the oldest at 57.3 years.

The most common age group was 65 and older (33 percent) for all travel markets. This percentage reflects an increase from 27 percent in 2011.

Children under 18 consistently made up 7 to 10 percent of Juneau visitors regardless of travel market.

Age and Gender (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Gender					
Male/female	45/55	57/43	44/56	49/51	53/47
Age					
Under 18	10	7	10	8	8
18 to 24	3	7	3	3	7
25 to 34	6	12	5	6	16
35 to 44	9	12	9	7	16
45 to 54	14	14	15	8	11
55 to 64	25	24	25	28	20
65+	33	24	33	41	21
Average Age	56.2 years	50.3 years	56.6 years	57.3 years	47.3 years

Note: Age and gender reflect the entire travelling party, not just the respondent.

Household Characteristics

Nearly one-quarter of Juneau visitors had children in their households. This figure was slightly lower among highway/ferry visitors and slightly higher among Juneau Only visitors.

Children Living in Household (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Children living in household	22	22	22	17	27
No children living in household	77	77	77	83	73
Don't know	<1	<1	<1	<1	<1

The average household income among Juneau visitors was \$116,700. Highway/ferry and Juneau Only visitors had slightly lower average incomes at \$94,200 and \$101,400, respectively.

Household Income (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Less than \$25,000	2	4	2	2	5
\$25,000 to \$50,000	7	9	7	11	11
\$50,000 to \$75,000	11	14	11	21	17
\$75,000 to \$100,000	15	14	14	24	16
\$100,000 to \$125,000	11	10	11	7	12
\$125,000 to \$150,000	9	10	9	9	9
\$150,000 to \$200,000	8	11	7	6	11
Over \$200,00	9	10	9	4	5
Refused	28	17	29	16	15
Average Income	\$116,700	\$115,200	\$117,000	\$94,200	\$101,400

Juneau visitors interviewed were roughly as likely to report being retired/semi-retired as not. However, air visitors and Juneau Only visitors were substantially less likely to be retired.

Nearly two-thirds of Juneau visitors interviewed (64 percent) have a college degree or higher level of education. Only 11 percent have a high school degree or lower level of education. Attainment rates were roughly consistent across visitor types.

Retirement Status and Education (%)
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Retirement Status					
Retired or semi-retired	50	33	51	54	28
Not retired	48	66	47	45	71
Don't know	<1	1	<1	<1	<1
Education					
Some high school	1	2	1	2	2
High school diploma/GED	10	8	10	7	9
Associate/technical degree	8	10	7	14	9
Some college	17	14	17	14	19
Graduated from college	38	39	38	33	42
Master's/Doctorate	26	27	26	30	19
Don't know	<1	<1	<1	<1	-

Expenditures

Juneau visitors spent an average of \$188 per person per trip. Juneau Only visitors spent the most per trip, at \$800, followed by air (\$630) and highway/ferry (\$281). Cruise visitors spent the least at \$162.

Spending by category also varied by travel market. The bulk of cruise visitor spending occurred in tours/activities/entertainment (\$95 per person per trip) and gifts/souvenirs/clothing (\$53). Other Juneau visitors spread their spending more widely in the community.

Lodging and food/beverage were the two largest spending categories for other Juneau visitors. Juneau Only visitors spent the most on lodging (\$246) and food/beverage (\$170), followed by tours/activities, transportation, other spending, and souvenirs. Air visitors spent an average of \$178 on lodging, \$131 on food/beverage, and more than \$50 in all other categories. Compared to air and Juneau Only visitors, highway/ferry visitors spent less per person in each category.

Visitor Expenditures in Juneau, Per Person, Per Trip
Juneau Visitors, Summer 2016

	All Visitors	Air	Cruise	Hwy/Ferry	Juneau Only
Lodging	\$11	\$178	-	\$90	\$246
Tours/activities/entertainment	\$95	\$96	\$95	\$48	\$142
Gifts/souvenirs/clothing	\$53	\$53	\$53	\$28	\$71
Food/beverage	\$19	\$131	\$12	\$79	\$170
Rental cars/fuel/transportation	\$5	\$87	\$1	\$26	\$98
Other	\$6	\$85	\$1	\$11	\$74
Total	\$188	\$630	\$162	\$281	\$800

Note: Multi-day packages that occurred exclusively in Juneau are included in the "other" category.

Economic Impact Analysis

Spending in Juneau by visitors and by the businesses that serve those visitors creates jobs, income, and secondary spending throughout the local economy. Visitor industry spending creates jobs and payroll with tour companies, hotels and lodges, retail establishments, transportation providers, and a range of other business. Visitor industry businesses and their employees in turn re-spend a portion of that money with other local businesses (some is spent outside the borough), creating additional economic impacts.

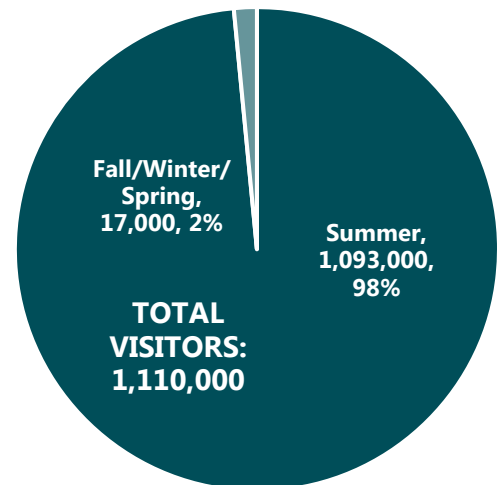
This chapter describes employment and labor income effects of visitor industry-related spending in Juneau in calendar year 2016. The analysis includes direct employment and labor income, as well as indirect and induced employment and labor income (the “multiplier effects”). Note that the impact analysis covers the 12-month period of January-December 2016, whereas the previous chapters in this report address summer visitors only.

Annual Visitor Traffic

Visitor traffic helps determine the extent of visitor spending impacts; average spending figures are applied to volume estimates to arrive at total direct spending estimates. (Visitor volume shown previously in this report refers to summer traffic only.)

Visitor traffic to Juneau in 2016 is estimated at 1,110,000, excluding Alaska residents from elsewhere in the state who visit Juneau for personal or business reasons (whose spending is also an important part of Juneau’s visitor industry). The chart at right shows how non-Alaska resident visitor volumes break down by season. The summer months of May through September represent 98 percent of annual traffic, while the fall/ winter/spring period represents just 2 percent.

Visitor Volume to Juneau, Summer versus Fall/Winter/Spring, 2016

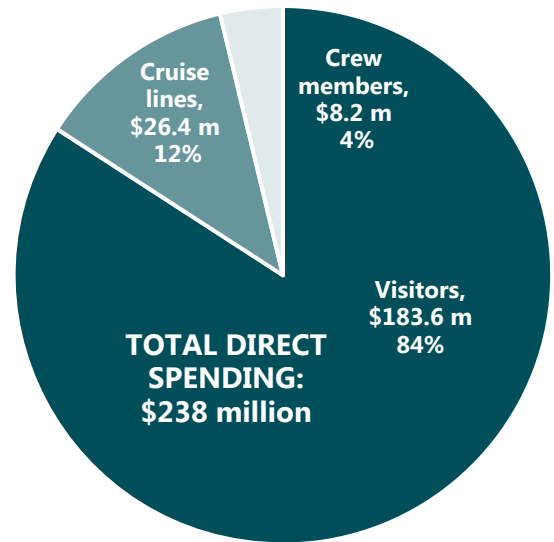


Visitor Industry Spending

Direct visitor industry spending totaled \$238 million in 2016. Visitor industry spending includes three categories: visitor spending (\$183.6 million), cruise line spending (\$26.4 million), and spending by cruise ship crew members (\$8.2 million).

Visitor spending represents all dollars spent by out-of-state residents while in Juneau, adjusted to account for tour commissions that accrue direction to cruise lines. Cruise line spending is added to visitor spending because it represents industry spending that accrues directly to local businesses, and is not accounted for in visitor spending, which excludes cruise package purchases. Cruise lines pay the City and Borough of Juneau and private dock owners for docking and moorage; they make purchases of food and equipment from local retailers; and they pay for local services such as dry-cleaning and printing, for example. Crew member spending is added to visitor spending because crew members were excluded from the AVSP survey sample.

Direct Visitor Industry Spending in Juneau by Category, 2016



Direct Spending and Impacts by Sector

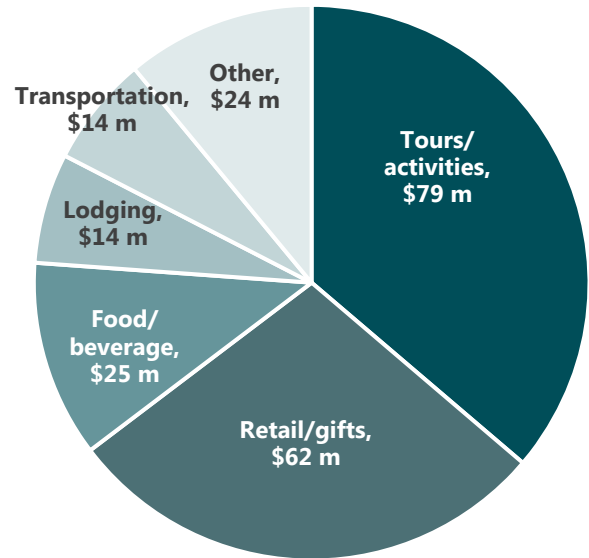
The chart at right shows how visitor industry spending in Juneau in 2016 breaks down by economic sector. Tours, activities, and entertainment purchases accounted for 36 percent of all spending at \$79 million, while retail represented 28 percent (\$62 million), food/beverage represented 11 percent (\$25 million), lodging and transportation each represented 6 percent (\$14 million), and other spending represented 11 percent (\$24 million). The “other” category includes payments to local government (including docking/moorage fees), utilities, and professional services.

The industry’s direct economic impacts include the jobs and income created by visitor industry spending on all goods and services purchased while in Juneau. The travel industry overall has a larger economic impact. For example, the lodging industry includes usage by other Alaska residents; for this reason, lodging sector employment as reported by Alaska Department of Labor and Workforce Development is higher than that reported here.

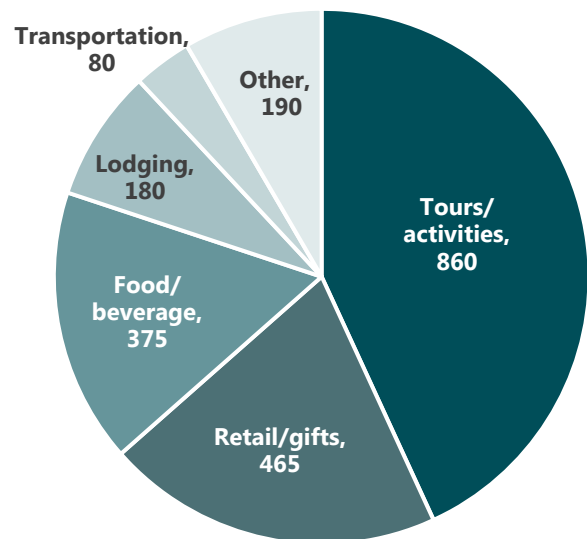
Visitor industry spending directly generated 2,150 full- and part-time jobs in Juneau, and \$77 million in labor income, based on McDowell Group’s economic impact modeling. Employment by sector is distributed similarly to passenger spending, though economic impact varies with the type of spending. For example, spending on services has a greater employment and wage impact than retail spending. Tours/activities accounted for 40 percent of employment at 860 jobs; retail accounted for 22 percent of employment at 460 jobs; food/beverage accounted for 17 percent of employment at 375 jobs; lodging accounted for 8 percent of employment at 180 jobs; transportation accounted for 4 percent of employment at 80 jobs; and jobs in the “other” category totaled 9 percent and 190 jobs.

Because of the seasonal nature of the visitor industry, peak employment is higher than the annual averages presented here. Peak visitor season employment is difficult to measure, but is likely about 25 percent higher than the annual average.

Direct Visitor Industry Spending in Juneau, By Sector, Summer 2016



Direct Visitor Industry Employment in Juneau, By Sector, 2016



TOTAL DIRECT EMPLOYMENT:
2,150 jobs
TOTAL DIRECT LABOR INCOME:
\$77 million

Total Economic Impacts

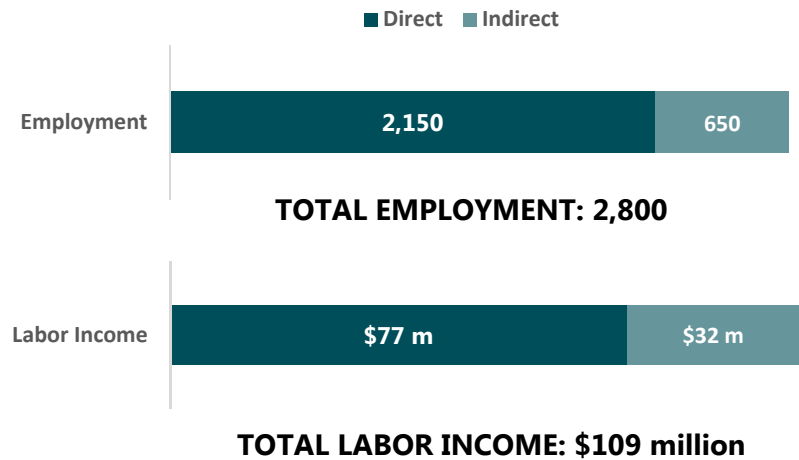
Direct employment and labor income estimates do not include multiplier effects, i.e., those jobs and income created in Juneau as the visitor dollar is re-spent by visitor industry businesses and their employees. This secondary spending is estimated to result in 650 jobs and \$32 million in labor income during the 2016 study period. Adding secondary impacts to the initial direct impacts of 2,150 jobs and \$77 million in labor income indicates total direct, indirect and induced impacts of 2,800 jobs and \$109 million in labor income.

This estimate is a tally of the total number of full- and part-time jobs linked to non-resident visitor travel to Juneau. It includes annual average wage and salary employment, and total proprietors' employment (the total number of sole proprietorships or partnerships active at any time during the year).

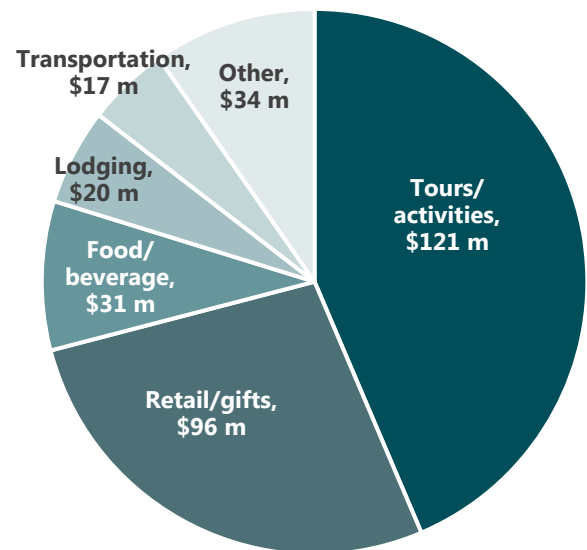
Economic output is another measure of economic impacts, shown in the pie chart at right. It provides a measure of total direct, indirect, and induced spending in Juneau related to non-resident visitors. Direct, indirect and induced output stemming from the visitor industry totaled \$319 million in 2016, about 10 percent of Juneau's total economic output.

The graphic on the following page demonstrates the way visitor spending filters through the local economy (using a gift shop as an example), creating jobs and income is nearly every sector of the economy.

Direct, Indirect, and Total Employment and Labor Income Related to Visitor Industry, 2016



Total Economic Output Resulting from Visitor Spending, By Sector, Summer 2016



"Alaska Treasure" Gift Shop



Visitor Industry Role in the Juneau Economy

The Bureau of Economic Analysis estimated total Juneau employment at 23,398 in 2015, including wage and salary workers and the self-employed. Total employment in 2016 was at about that same level, based on 2015 and 2016 wage and salary employment as report by the Alaska Department of Labor and Workforce Development (ADOLWD).²

Based on the estimate of 2,800 total (direct and indirect) jobs resulting from visitor spending in 2016, visitor industry spending-related employment represented 12 percent of Juneau employment. In terms of labor income, visitor industry spending-related labor income represented 7 percent (\$109 million) of total labor income reported in 2015 (\$1.6 billion). (Visitor industry employment typically represents a greater share than labor income due to lower-than-average wages in this sector.)

Municipal Revenues from Visitor Industry

The visitor industry generates significant revenues to the City and Borough of Juneau, in the form of sales tax, room tax, property taxes, and fees. Note that employment and labor income impacts from these taxes and revenues are captured in the previous section as part of the visitor industry spending analysis.

TAX REVENUES

Sales Tax

Juneau's visitor industry (including cruise lines, crew members, and out-of-state visitors) contributed an estimated \$13.5 million in municipal taxes in 2016, with the largest component represented by sales tax revenues at \$10.4 million. In FY 2016, CBJ sales tax revenue totaled approximately \$46.1 million. The visitor industry directly accounted for more than one-fifth (22 percent) of CBJ sales tax revenue. This is a conservative estimate. There are also indirect and induced sales tax revenues attributable to the visitor industry. For example, a tour company will make a range of taxable purchases of goods and services in Juneau, as will the employees of that tour company.

Transient Room Tax

Transient room tax revenues associated with out-of-state visitor industry spending totaled \$0.9 million; this figure does not include room tax revenues resulting from local and Alaska resident usage. CBJ room tax revenues from all sources totaled \$1.49 million in FY 2016.

Property Tax

It is difficult to fully measure property tax revenues attributable to Juneau's visitor industry. Some taxable properties purely serve non-resident visitors, such as privately-owned cruise ship docks. Many businesses (with taxable assets) active in the visitor industry also serve local customers or residents from elsewhere in Alaska.

² According to ADOLWD data, employment in Juneau declined by 0.3 percent between 2015 and 2016. Total wages increased by the 0.3 percent over the same period.

This includes hotels, restaurants, and retail establishments. Further, the many households in Juneau that earn wages or other income from the visitor industry also generate property tax revenues for CBJ.

Detailed examination of the CBJ property tax rolls indicates that business heavily reliant on non-resident visitor spending paid a total of about \$2.2 million in property taxes in 2016. This includes property tax payments made by owners of downtown retail properties, tour companies, flightseeing operations, and lodging establishments. Similar to sales tax revenues, there are also indirect and induced property tax revenues attributable to the visitor industry that are difficult to quantify but nevertheless highlight that the \$2.2 million figure is a conservative estimate of the industry’s total property tax contribution. In FY 2016, CBJ took in a total of \$47.5 million in property tax revenues.

Summary

In total, the visitor industry generated approximately \$13.5 million in municipal tax revenues, including sales, room, and property taxes.

CBJ Tax Revenues from Visitor Industry Spending, 2016	
	Revenues
Sales tax revenues	\$10.4 million
Room tax revenues	\$0.9 million
Property tax revenues	\$2.2 million
Total tax revenues	\$13.5 million

MOORAGE/DOCKING AND VENDOR FEES/PERMITS

CBJ Docks and Harbors collected an estimated \$9.6 million in cruise line-industry related fees in 2016. Nearly \$8 million of this figure is attributable to the Marine Passenger and Port Development fees paid by cruise lines.

Marine Passenger Fee

The CBJ assesses a Marine Passenger Fee of \$5 for each cruise ship passenger arriving in Juneau. This fee is intended to “assist in funding projects that enhance the tourism experience and offset community impacts created by the cruise ship industry.”³ Vessels carrying 20 or fewer passengers, those without berths or overnight accommodations for passengers, and noncommercial ships are exempted from this fee. The Marine Passenger Fee generated \$4.9 million in revenue in FY2016 and \$5 million in CY2016.

Port Development Fee

Commercial passenger vessels must pay CBJ a \$3 per passenger Port Development Fee. Vessels under 200 tons, noncommercial vessels, and government vessels are exempt. The fees are deposited in the Port Development Fund, which is used for capital improvements to port facilities. Port Development Fees collected by CBJ totaled \$2.9 million in FY16 and slightly less than \$3 million in CY2016.⁴

³ <https://beta.juneau.org/manager/marine-passenger-fee-program>

⁴ CBJ FY17 Adopted Budget.

Port Dockage Fees

CBJ charges port dues for all vessels carrying passengers for compensation that dock at publicly-owned docks.⁵ Dockage rates are calculated based on vessel registered net tonnage at \$.055 per net ton. Vessels with twelve or fewer passengers, those traveling only between Juneau and 100 miles of Juneau ports, and non-commercial or government vessels are exempt from these fees. Wharfage fees, also termed port maintenance fees, total \$3.00 per linear foot at the docks and a flat fee of \$600 per day at tendering docks. Port dues are deposited in the CBJ Port Development Fund. The Docks enterprise fund budget shows FY15 revenue for charges for services and licenses, permits, and fees to be \$1.5 million and \$1.4 million for FY16.

State Commercial Passenger Vessel (CPV) Tax

The Commercial Passenger Vessel (CPV) Tax is a State of Alaska tax assessed on passengers traveling on commercial passenger vessels that anchor or moor for more than 72 hours in State marine waters. The tax applies only to vessels with at least 250 berths or other overnight accommodations for passengers. A portion of this tax is distributed to port communities, and another portion is distributed as grants to communities and other qualified recipients. The Department of Revenue's Tax Division collects the CPV taxes and distributes \$5 per passenger to the first seven port communities visited during a ship's voyage. The CBJ received \$4.55 million in State Marine Passenger Fees in FY16.

Other Fees

The visitor industry pays a variety of other fees to CBJ, totaling about \$570,000 in 2016. This includes charges for potable water, loading zone fees, vendor booth permits, and others.

See Summary Table, next page.

⁵ City and Borough of Juneau Municipal Code 85.02.105.

Summary

In total, the visitor industry generated approximately \$14.1 million in cruise and other marine-related CBJ revenues.

Visitor Industry Marine-Related Revenues to CBJ, 2016

	Revenues
CBJ Docks and Harbors Revenues	
Marine Passenger Fees	\$5,004,000
Port Development Fees	\$2,976,000
Large Cruise Ship Dockage Fees	\$523,000
Small Cruise Ship Dockage Fees	\$19,000
Port Maintenance Fees	\$514,000
Potable Water Fees	\$96,000
Vessel Lightering Fees	\$15,000
Waterfront Sales Vendor Booth Permits	\$248,000
Downtown Loading Zone Permits	\$74,000
Statter Harbor Loading Zone Permits	\$9,000
Passenger for Hire Permits	\$129,000
Total Docks and Harbors revenues	\$9.60 million
State Marine Passenger Fees (FY 2016)	\$4.55 million
Total	\$14.15 million

Note: Figures have been rounded.