



Formerly McDowell Group

JUNEAU CRUISE PASSENGER SURVEY 2023

December 2023

PREPARED FOR:

City and Borough of Juneau



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Executive Summary

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

Following are key findings from the survey.

Tours/Attractions

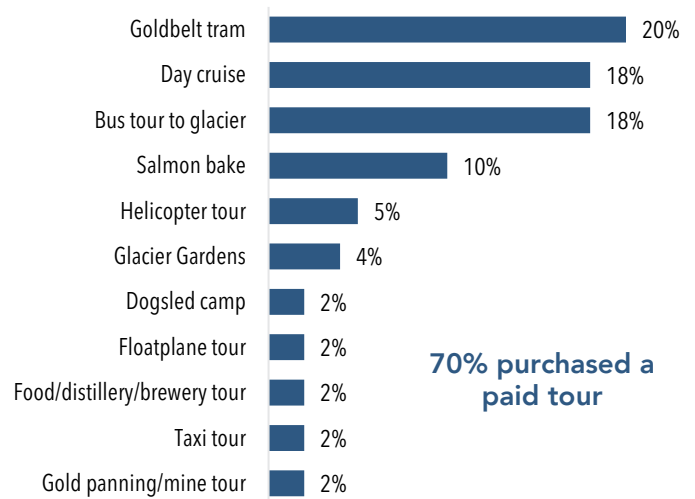
Seven out of ten passengers (70%) reported purchasing at least one paid tour in Juneau. The most common tours were the tram (20%), day cruise (18%), bus tour to glacier (18%), and salmon bake (10%).

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

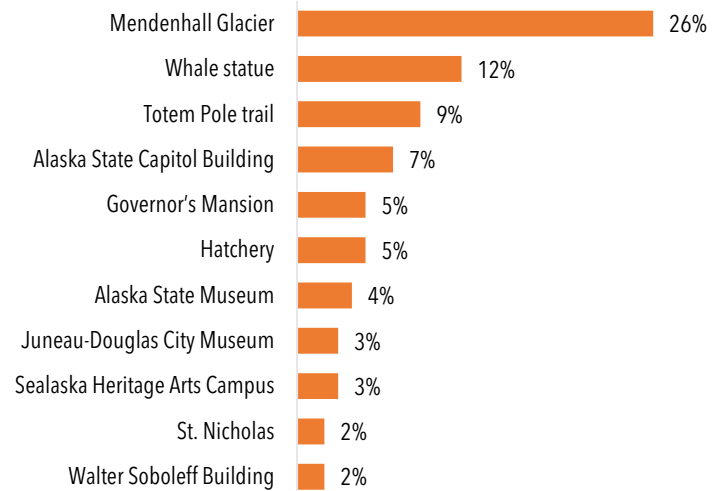
Passengers were asked whether they had engaged in additional activities including shopping (67%), restaurants/bars (33%), hiking (23%), and wildlife viewing/bird-watching (9%).

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

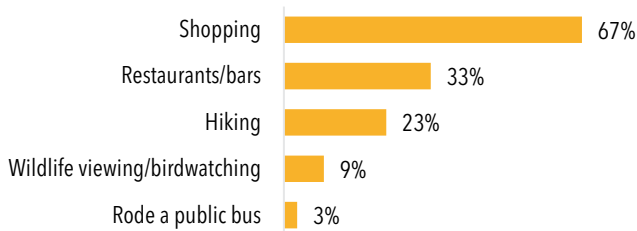
Top Paid Tours/Excursions
<1% participation



Top Attractions Visited
<1% visitation



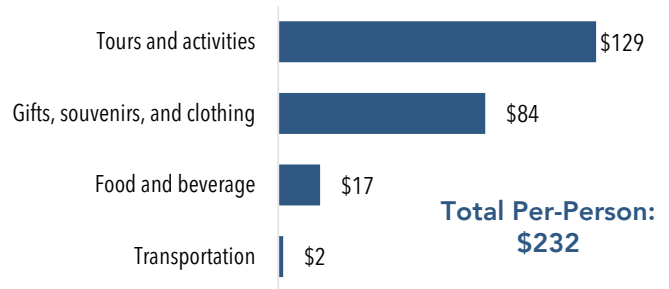
Top Additional Activities
<1% participation



Spending

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

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

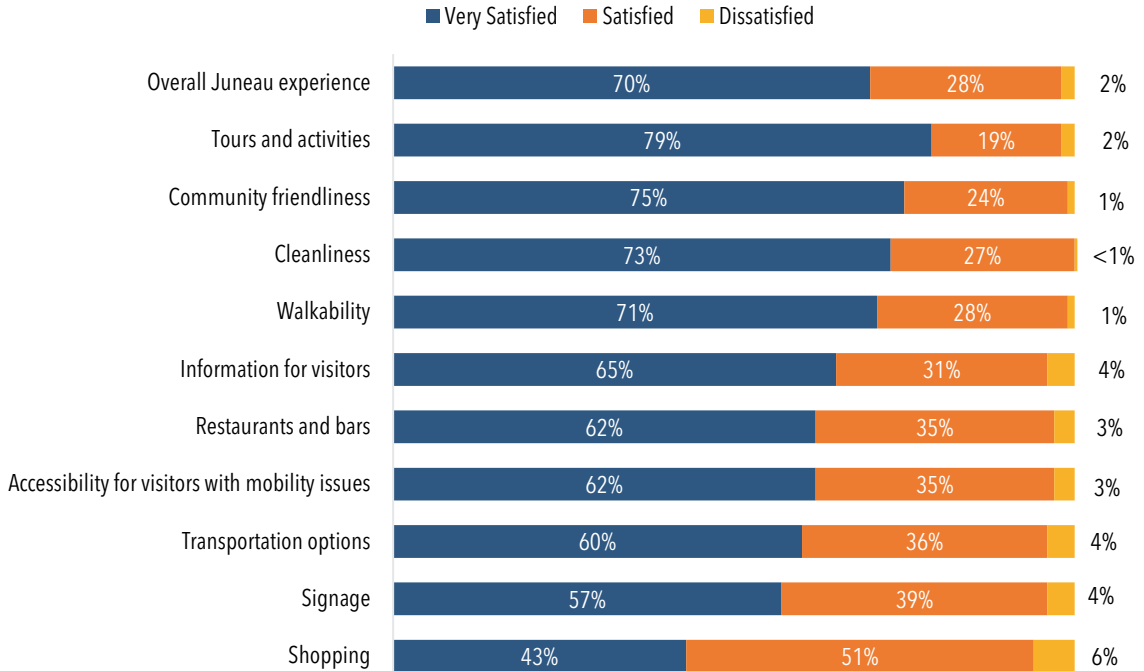


Satisfaction

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

Satisfaction Ratings

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



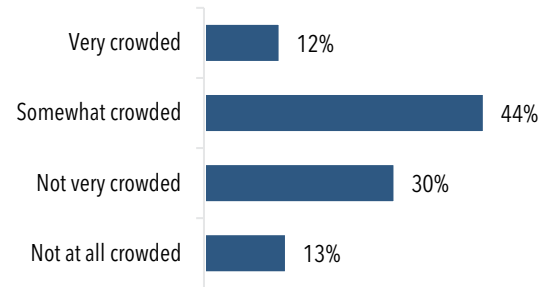
Note: “Dissatisfied” includes “very dissatisfied” and “dissatisfied” responses.

Crowding

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

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

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



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

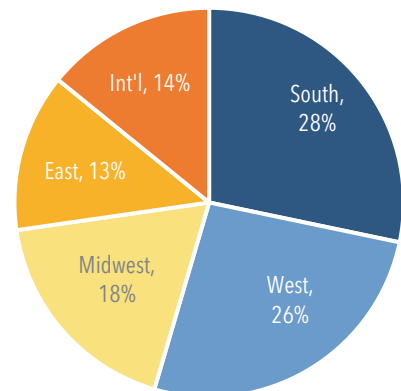


Note: Excludes “don’t know” responses.

Repeat Juneau Travel

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

Passenger Origin



Demographics

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

Passenger Demographics

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

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

Introduction and Methodology

Introduction

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

Methodology

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

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

Table 1. Passenger Sample Sizes by Cruise Line

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

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

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

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

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

Tours and Activities

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Spending

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

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

Passenger Spending in Juneau Per-Person Average

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

Excludes "don't know" responses.

*Including pre-paid tours.

Satisfaction

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

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

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

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

Table 7. How satisfied were you with...

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

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

Crowdedness

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

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

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

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

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

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

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

Trip Planning

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

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

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

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

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

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

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

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

Base: Participated in paid tour

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

Previous and Future Juneau Travel

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

Table 13. Is this your first trip to Juneau?

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

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

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

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

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

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

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

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

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

Demographics

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

Table 17. Passenger Origin

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

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

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

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

*A party was defined as those sharing trip expenses.

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

Table 19. Gender of Respondent and Party

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

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

Table 20. Age of Respondent and Party

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

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

Table 21. Highest level of Education Completed

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

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

Table 22. Household Income

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

Comparison with 2016 Survey

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Cruise Line Sampling and Weighting

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

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

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

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

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

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

² Source: City and Borough of Juneau.

“Other” Responses to Open-Ended Questions

WHAT PAID TOURS DID YOU PARTICIPATE IN TODAY?

- City bus to glacier
- DIPAC
- Pedicab

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

- AAA
- Alaska Shore Tours

DID YOU PARTICIPATE IN ANY OTHER ACTIVITIES WHILE IN JUNEAU?

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

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

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

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