
February 6, 2023

Juneau Tourism Survey 2023 Juneau Cruise Passenger Survey 2023 Juneau Cruise Industry Impacts 2023

Extended Slide Deck

PREPARED FOR:

Southeast Conference Mid-Session Summit

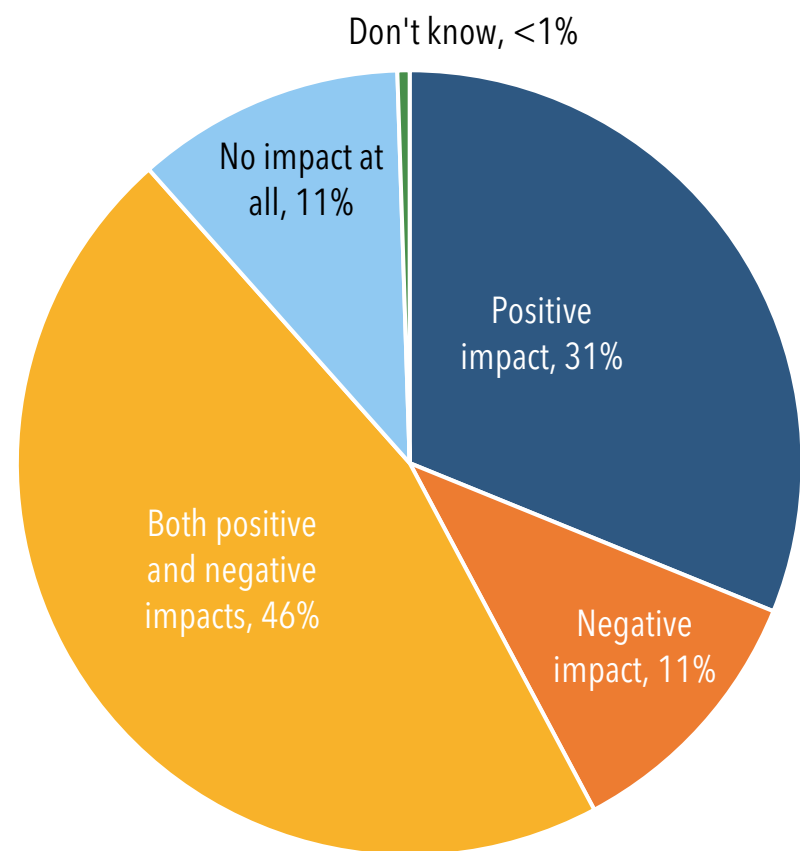


McKINLEY RESEARCH
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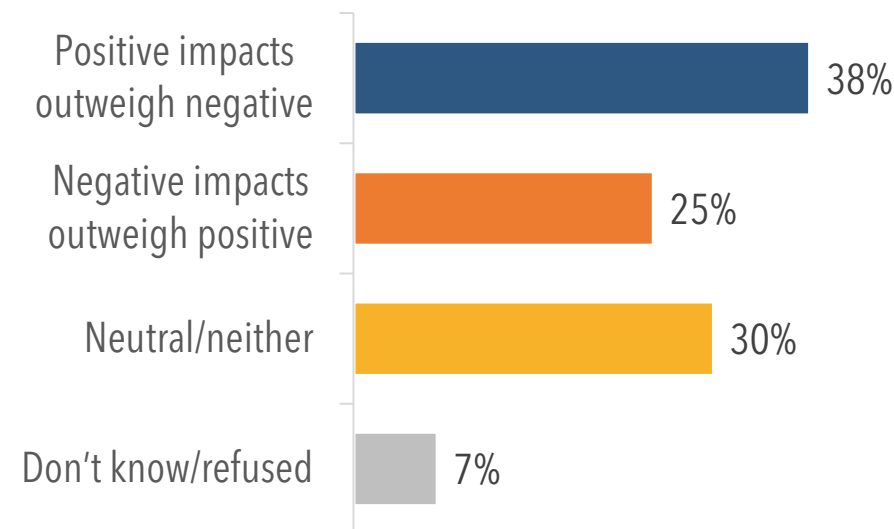
Resident Survey Methodology

- Telephone survey of 517 randomly selected residents
- Mix of cell and landlines
- Some questions repeated from previous surveys (1995, 1998, 2002, 2006, 2021, 2022)
- 2021 survey referenced 2019 season
- Screener: lived in Juneau in summer 2023
- Max. margin of error: $\pm 4.3\%$
- Data weighted by age and neighborhood to reflect population
- Results tested for differences between subgroups: neighborhood (live/work), age, gender

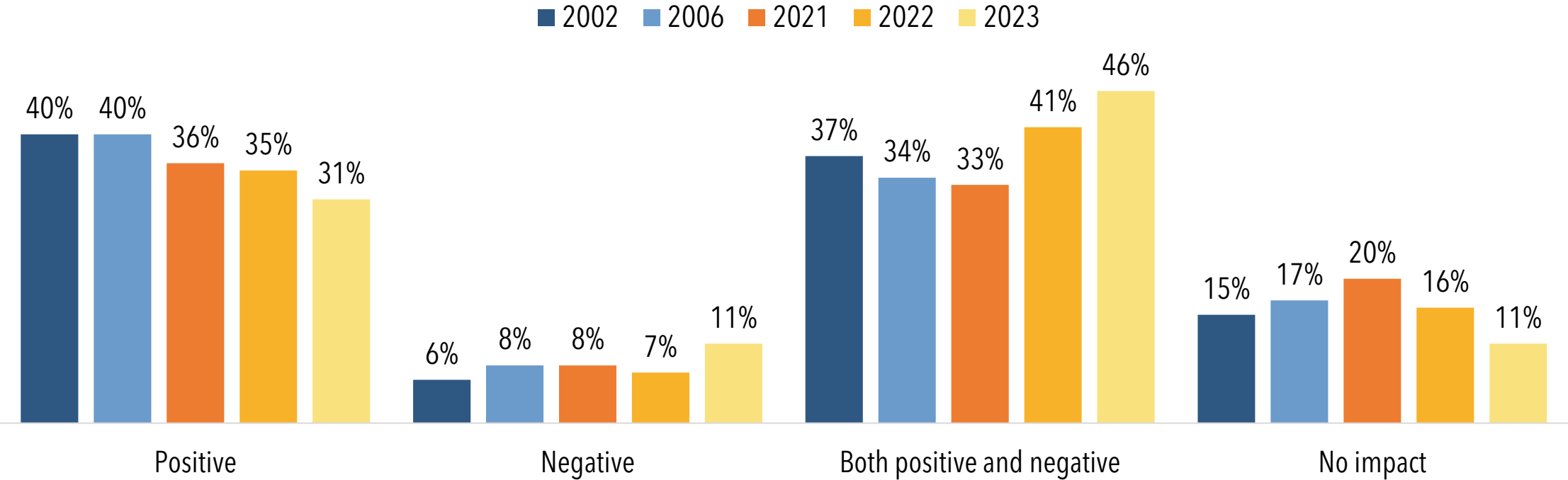
Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?



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

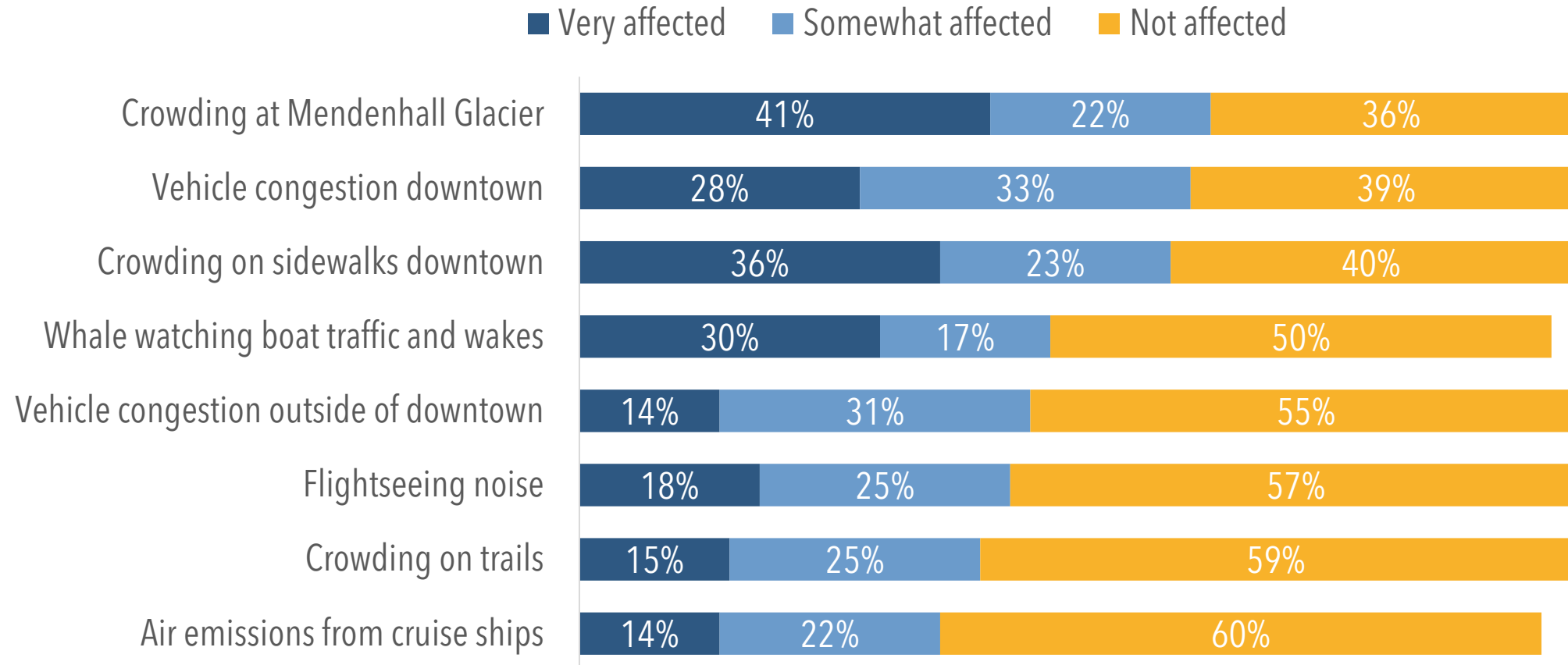


Comparison: Overall Impact of Tourism on Households, 2002-2023

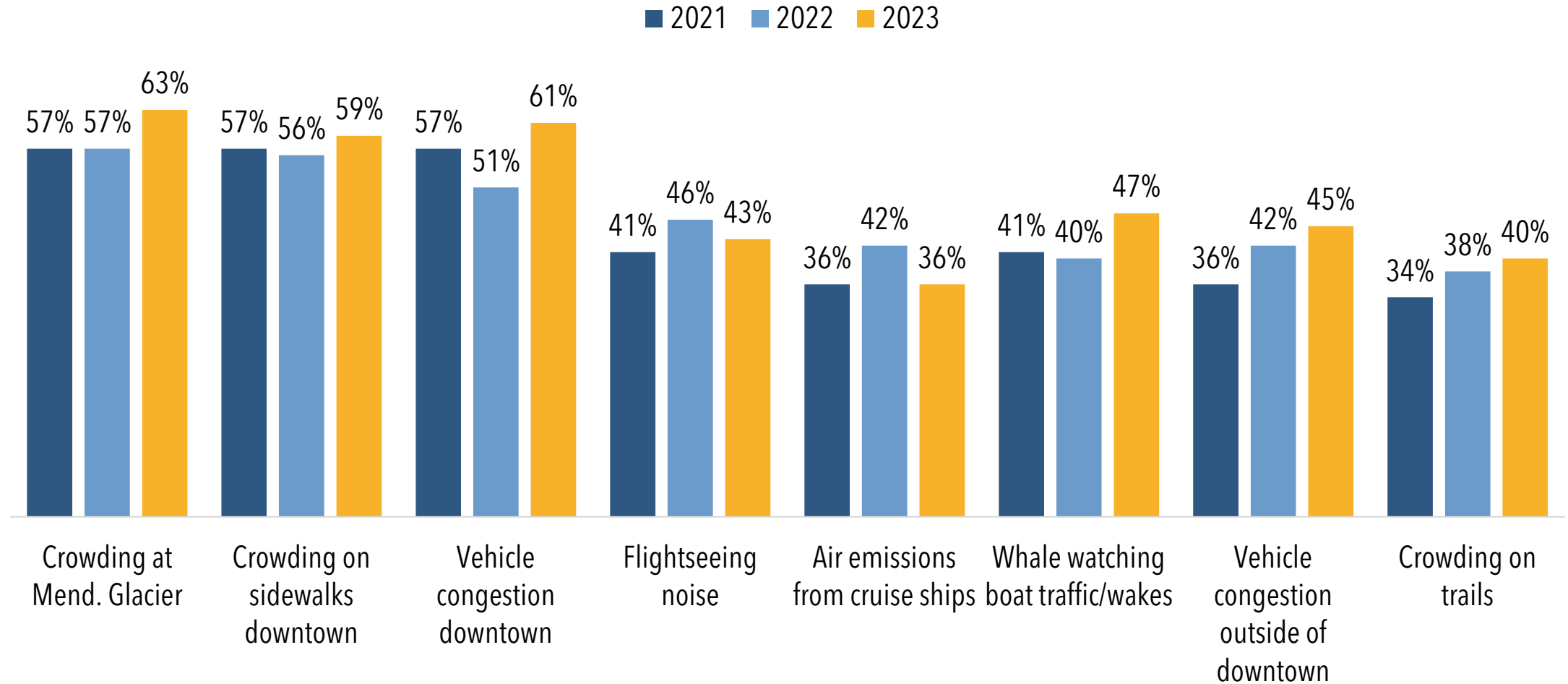


	2002	2006	2019	2022	2023
Cruise passenger volume	741,500	951,400	1,305,700	1,150,000	1,670,000

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



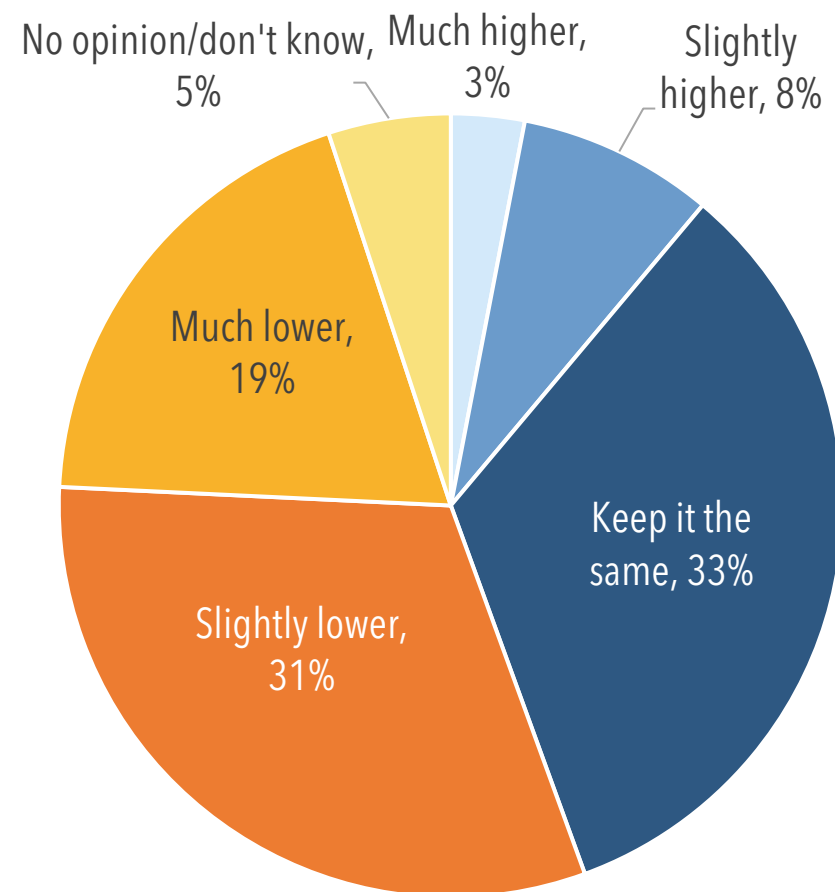
Comparison: Very + Somewhat Affected, by Category, 2021, 2022, 2023



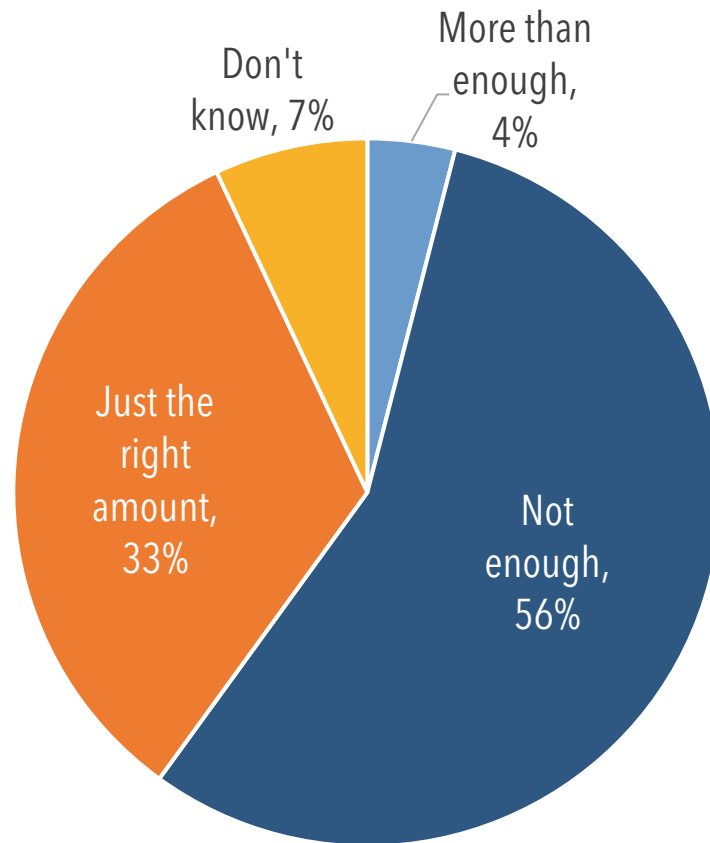
(Read before question)

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

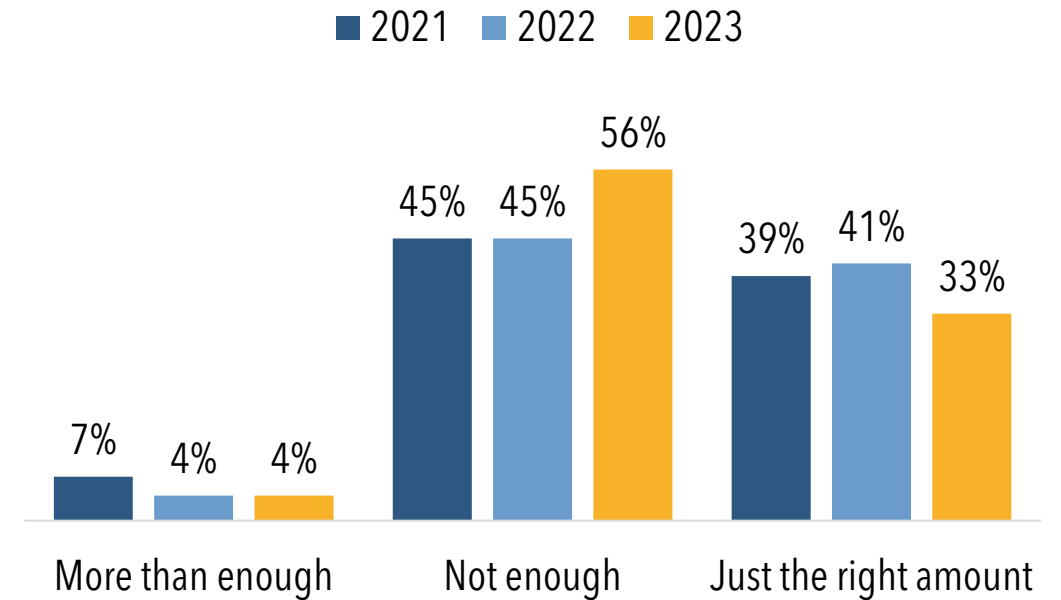
What is your preference for future cruise passenger volume in Juneau?



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

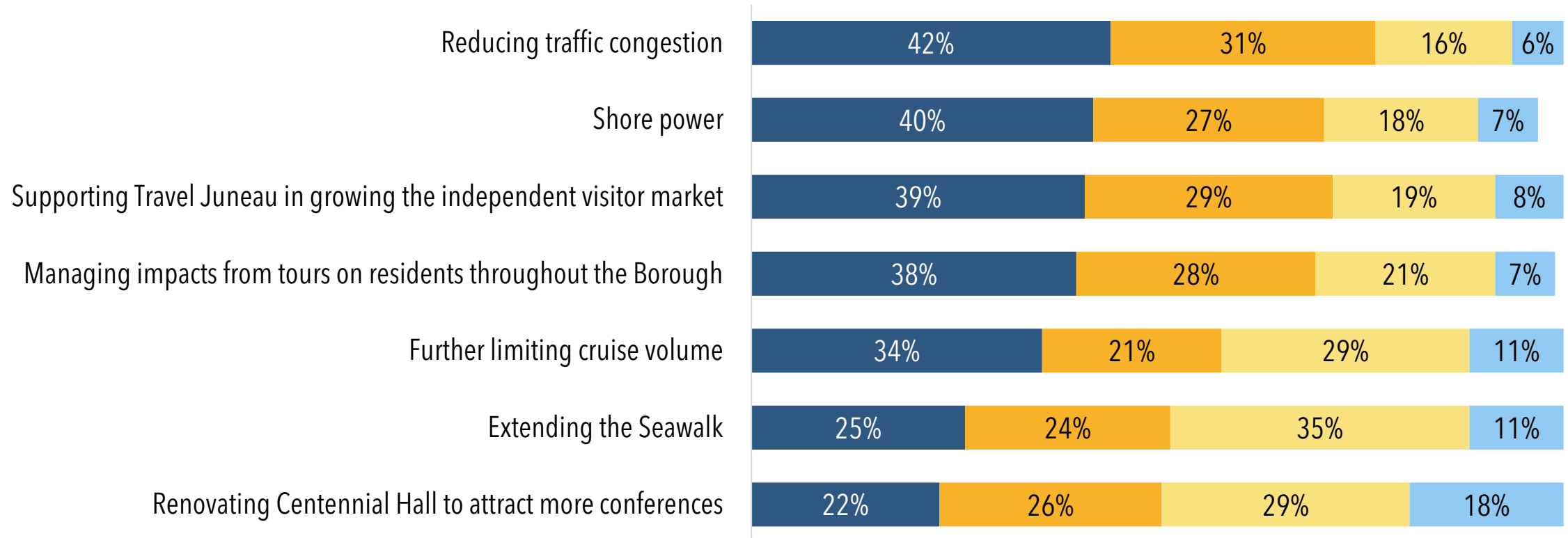


Comparison: 2021, 2022, 2023



Should the CBJ Tourism Department place a high priority, medium priority, low priority, or not a priority on each of the following items?

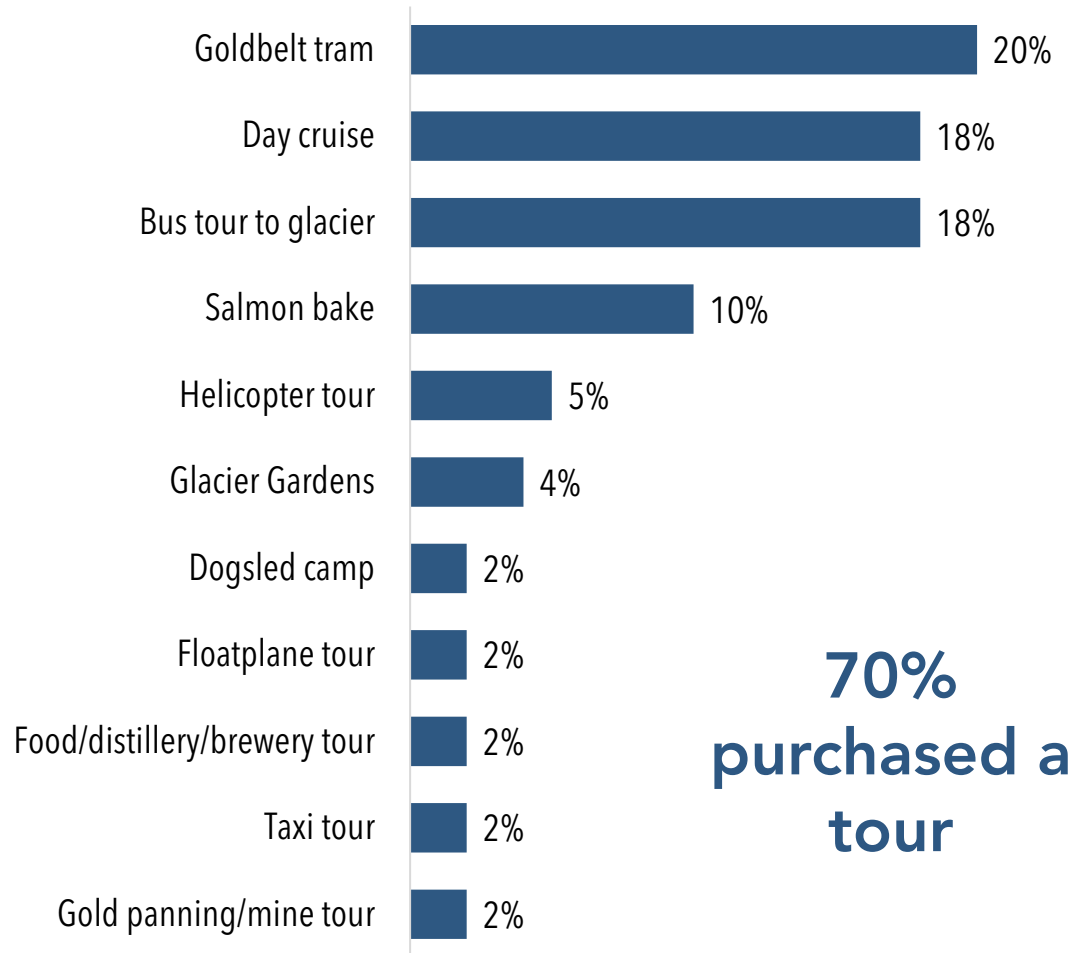
■ High Priority ■ Medium Priority ■ Low Priority ■ Not a priority



Passenger Survey Methodology

- Intercept survey of 510 cruise ship passengers on docks July-September 2023
- Sample designed to represent mix of cruise lines, vessel size, dock location
- 36 port calls; vessels of 250+ passengers
- Max. margin of error: $\pm 4.4\%$
- Data weighted by cruise line to represent passenger volumes

Paid Tour Participation

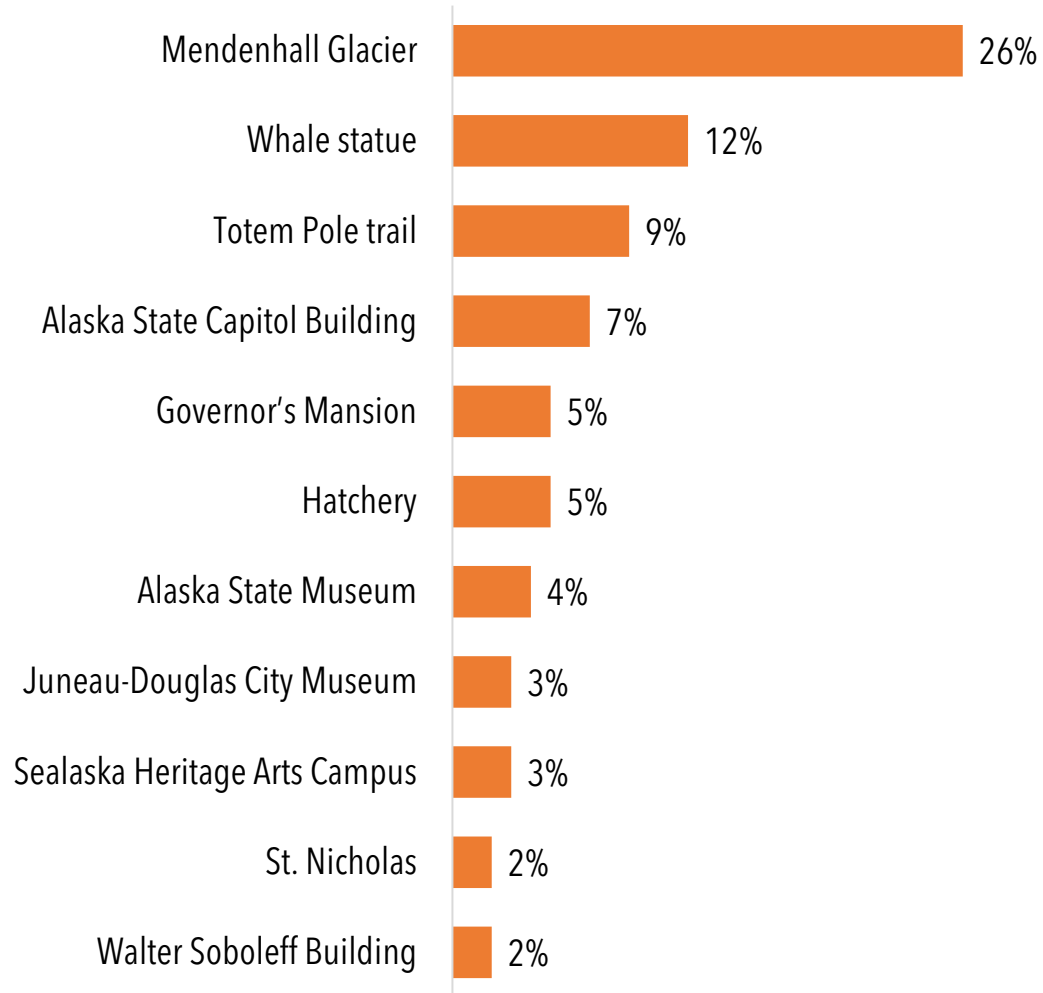


70%
purchased a
tour

≤1% participated in...

- Sportfishing (inc. Chum Fun)
- Guided biking/Segway
- Guided hiking
- City bus tour (Trolley, Eaglecrest bus)
- Rafting
- Kayaking
- Jeep tour
- Guided walking tour
- Canoeing

Attractions Visited



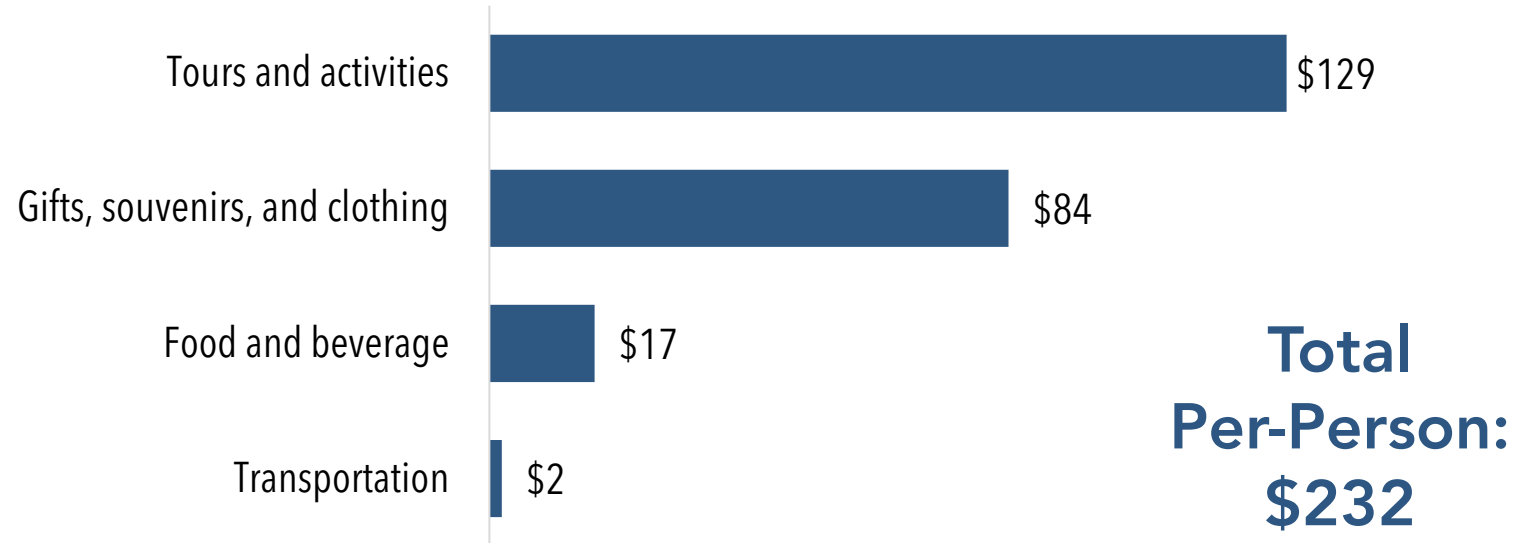
≤1% visited...

- Cope Park
- Shrine of St. Therese
- Basin Road
- Jensen Olsen Arboretum

Additional activities

- Shopping 67%
- Restaurants/bars 33%
- Hiking 23%
- Wildlife viewing 9%
- Rode a public bus 3%
- Rented a car 1%
- Rented a bike/e-bike 1%

Average Per Person Spending in Juneau

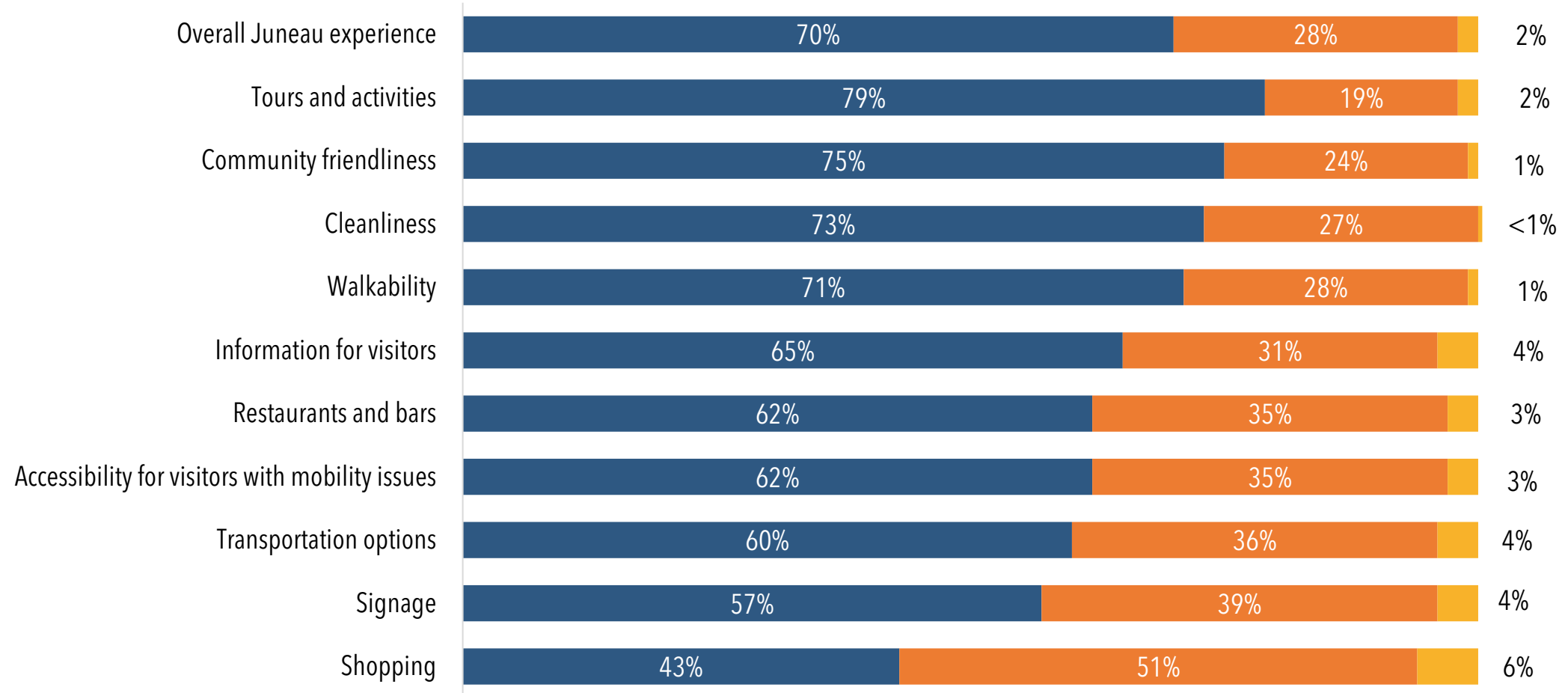


- Average per-person spending increased 13% between 2016 and 2023 after adjusting for inflation
- Increase was higher in retail than in tour spending

Satisfaction Ratings

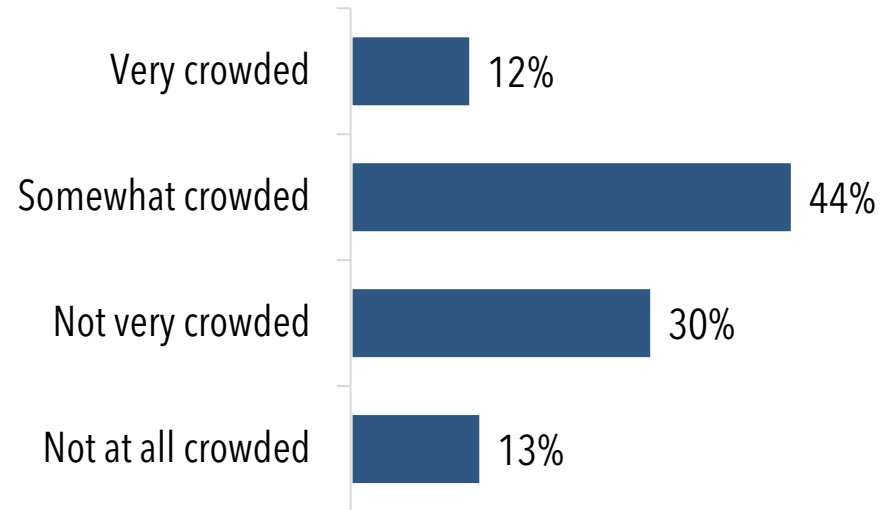
Excludes "Don't know" and "Does not apply" responses

■ Very Satisfied ■ Satisfied ■ Dissatisfied



Note: "Dissatisfied" includes "Very dissatisfied" responses.

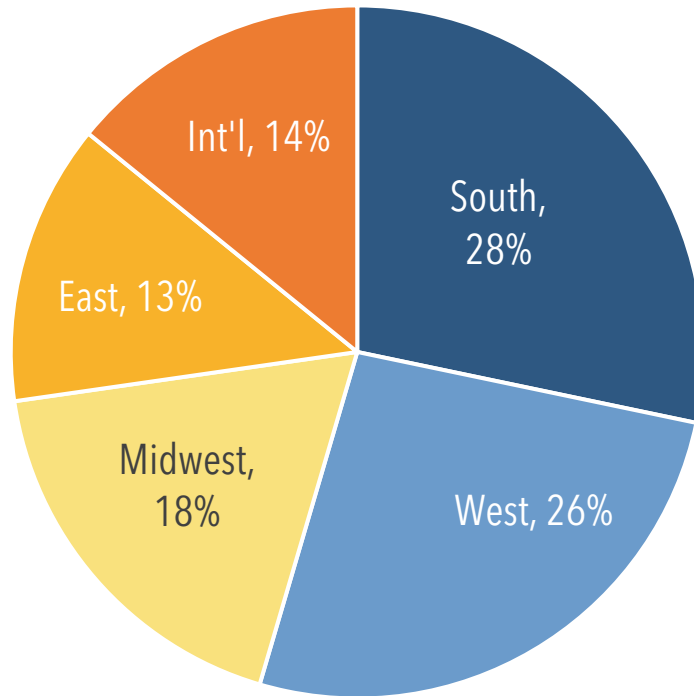
How would you describe Juneau as a place to visit in terms of crowding?



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



Passenger Origin



Passenger Demographics

	Average / %
Average party size	2.8 people
Average age	55 years old
Male/female/other	46/53/1
Average household income	\$139,000

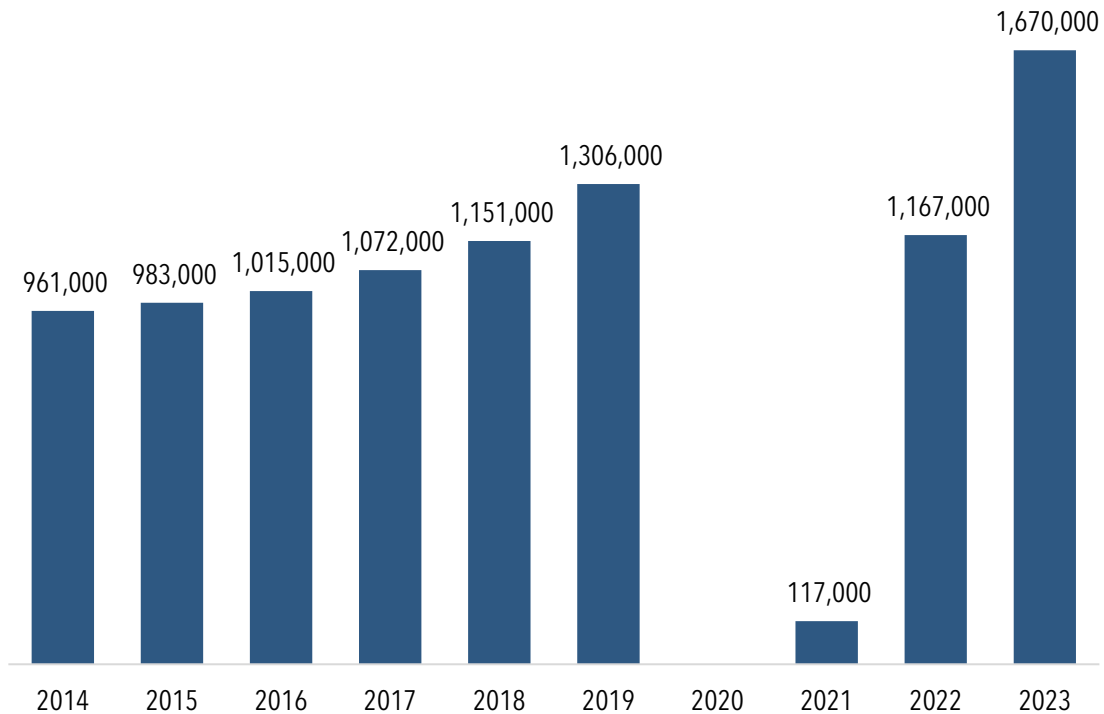
Repeat Travel

- 24% had been to Juneau before
- Among repeat visitors, 94% had visited via cruise ship
- 32% said they were "very likely" to return

Economic Impact Methodology

- **Passenger spending** based on passenger survey, adjusted to account for commissions accruing to cruise lines and travel agencies
- **Crew member spending** based on online survey of crew members in August 2023
- **Cruise line spending** based on data provided by five cruise lines extrapolated to represent entire market
- **Economic impacts** based on IMPLAN, adjusted to reflect Juneau's unique economy
- **Municipal revenues** based on CBJ Port/Harbors data, sales tax rates, bed tax rates
- **Additional sources:** CLAA, Bureau of Economic Analysis, Department of Labor, CBJ Gross Sales, previous small cruise ship analysis

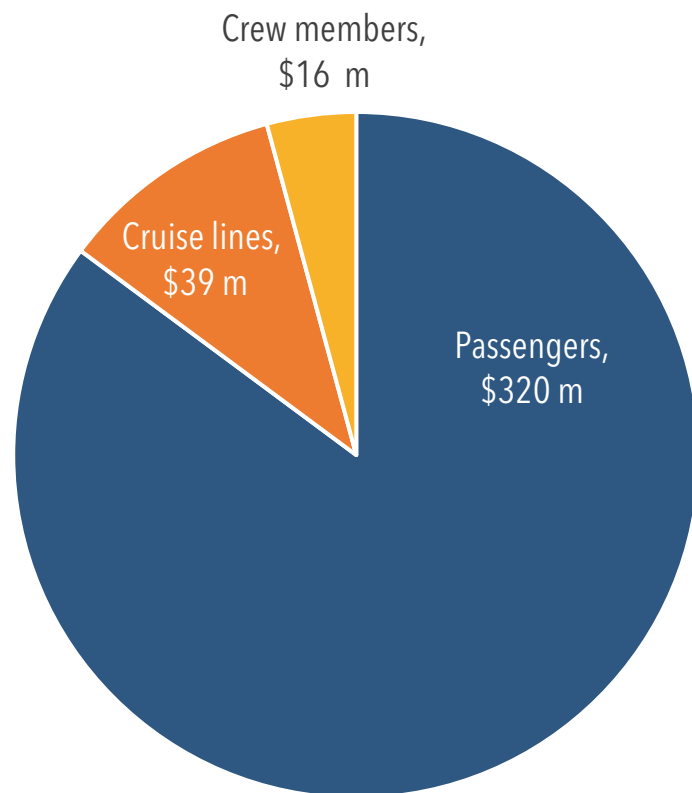
Cruise Passenger Volume



2023 indicators

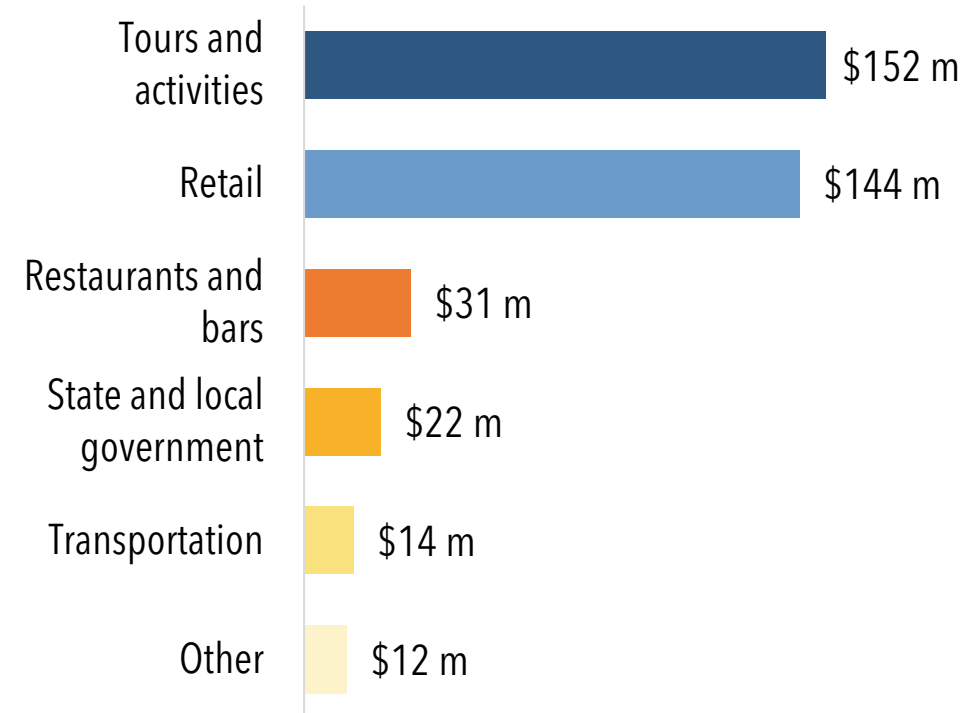
- **700+ port calls**
- **1,670,000 passengers**
- **36,000 crew members**
- **By size of ship**
 - Large ships (>1,000 pax): 98%
 - Mid-size ships (250-1,000 pax): 1%
 - Small ships (<250 pax): 1%
- **Compared to past**
 - Up 43% from 2022
 - Up 28% from 2019

Direct Spending by Source



**Total
Spending:
\$375 million**

Direct Spending by Sector



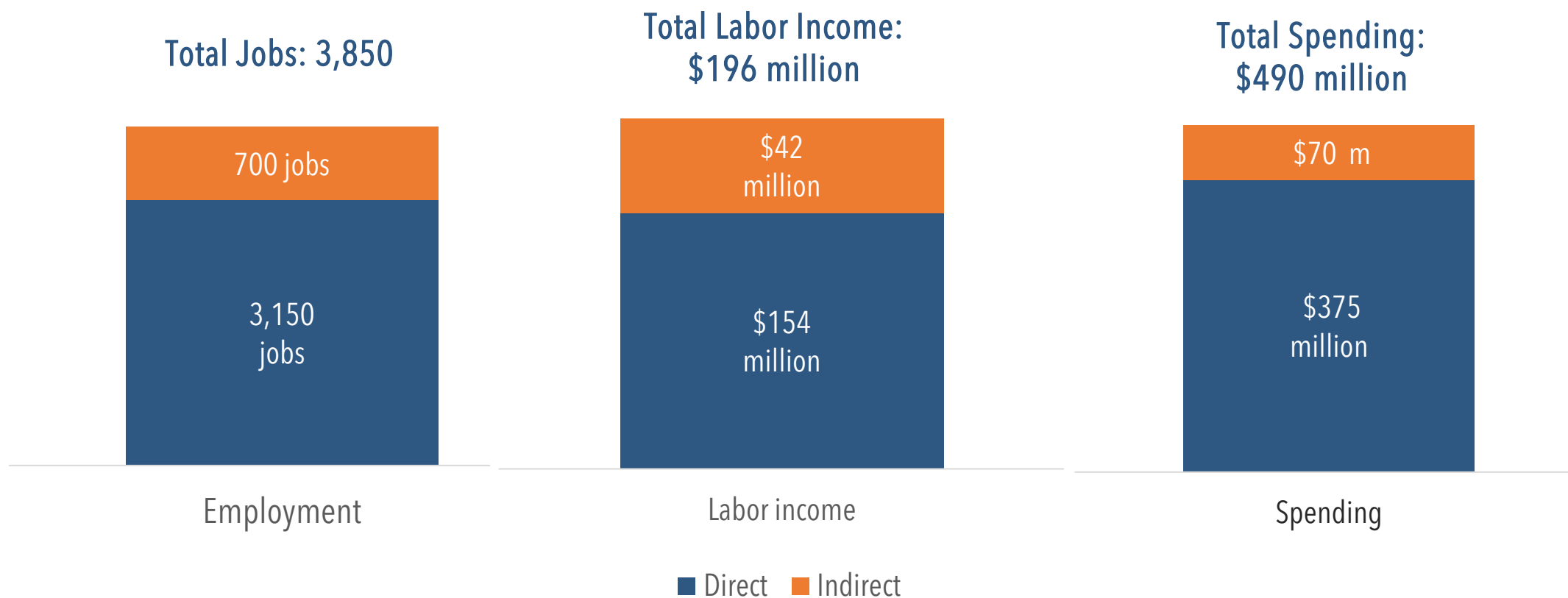
Economic Impact Definitions

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

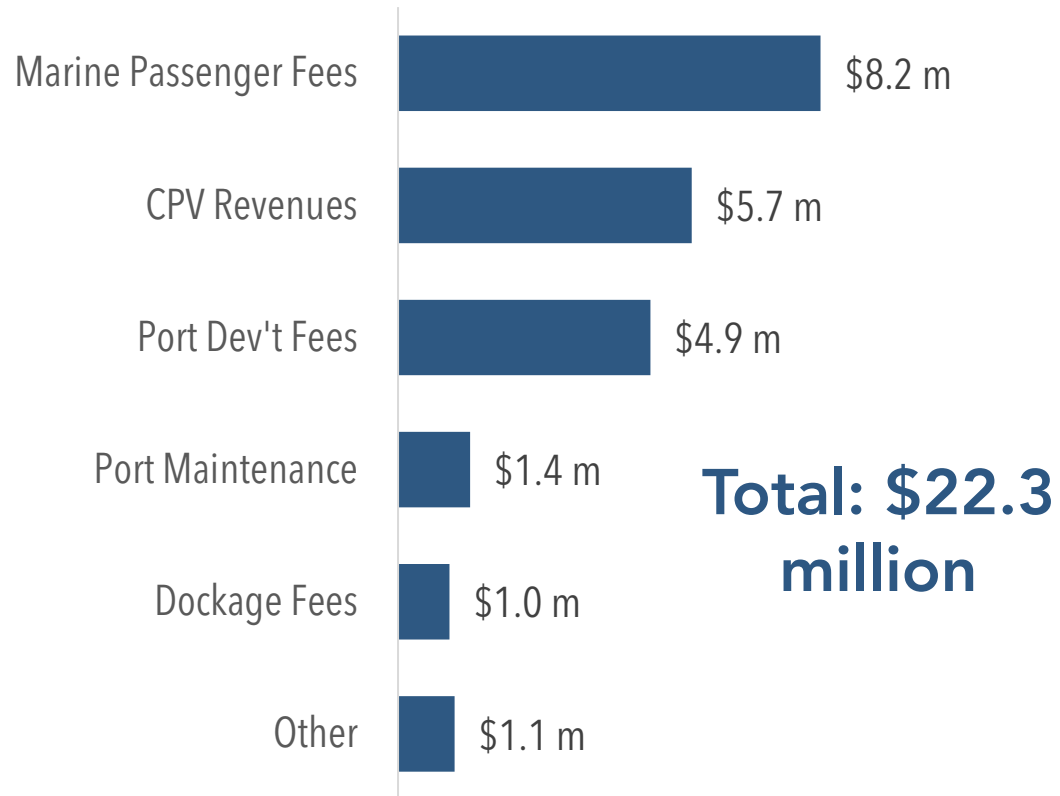
Indirect Impacts: Jobs and labor income resulting from tourism businesses making local purchases; for example, when a whale watch operator purchases fuel, or a restaurant buys local produce.

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

Economic Impacts



CBJ Marine-Related Revenues



Other includes booth fees, water fees, loading zone permits, lightering fees, small cruise ship dockage

Other CBJ Revenues

- \$17.7 million in sales tax revenues
- ~\$600,000 in bed tax revenues
- Property tax revenues: last measured in 2016 (\$2.2m for all tourism)

Questions



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