

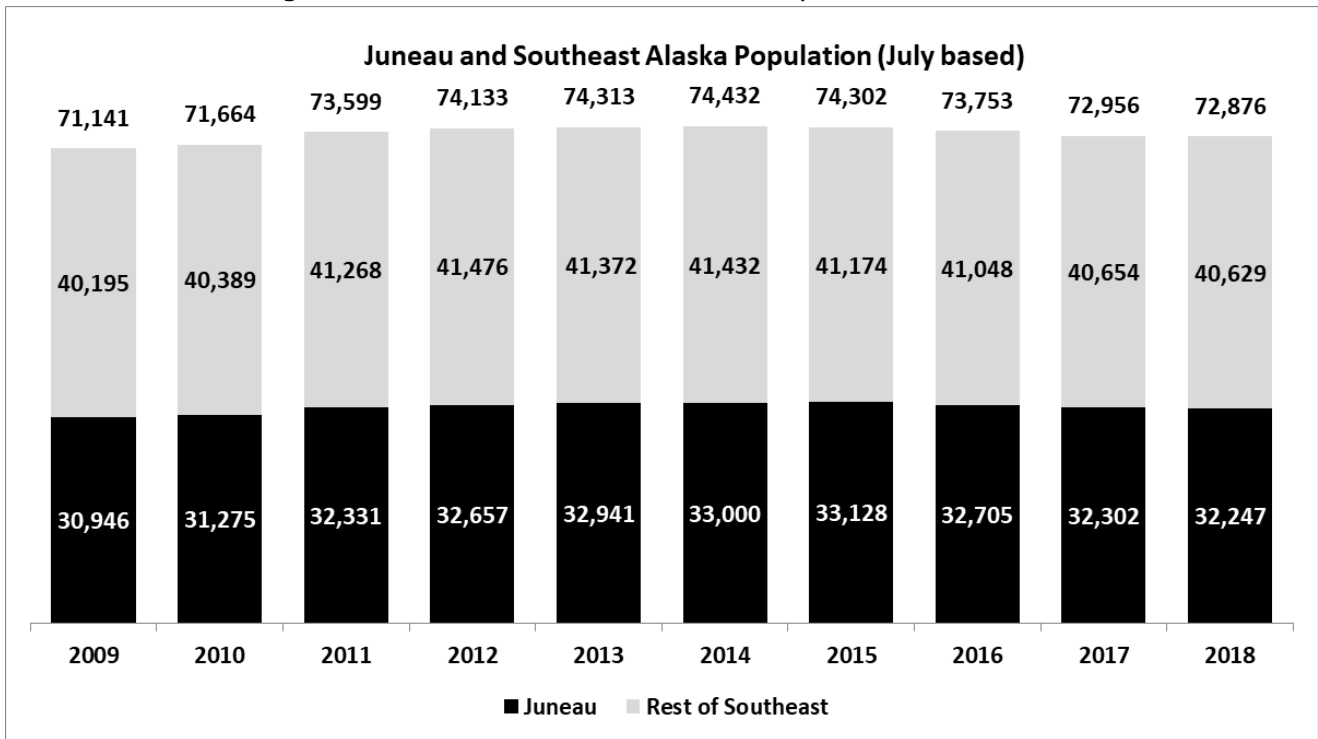
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Demographics

Juneau Population Trends

In 2018, Juneau’s population held nearly steady after two years of out migration. The July 2018 population estimate of 32,247 was below the previous year’s estimate by approximately 55 individuals. The rest of Southeast Alaska, excluding Juneau, also stayed flat, with a population decline of only approximately 25 individuals. An overall loss of 881 residents from Juneau’s peak population of 33,128 in 2015 has brought the City and Borough population back to 2011 levels.

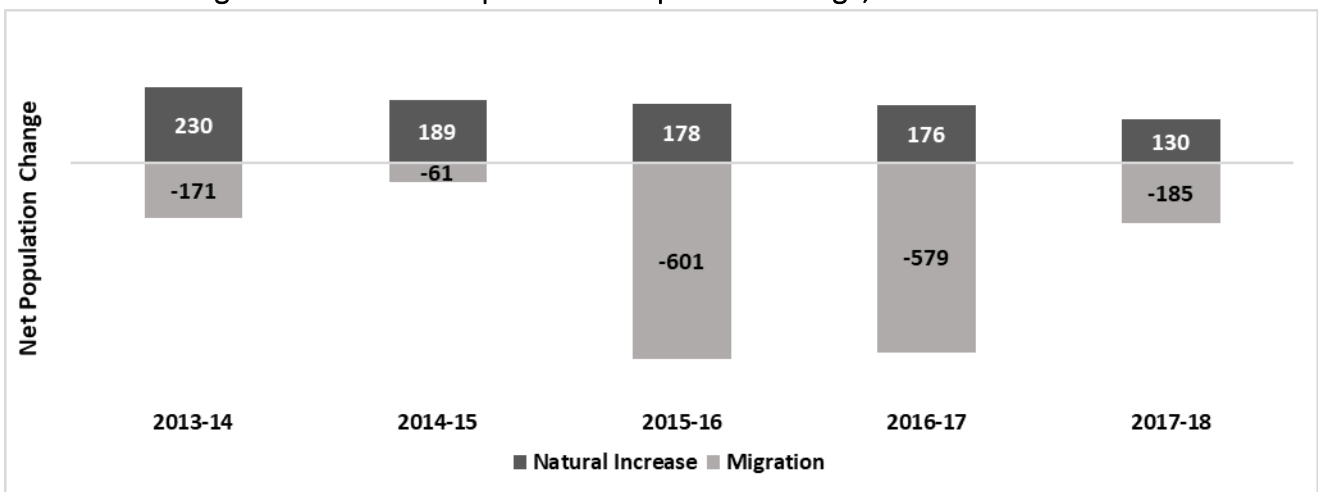
Figure 33: Juneau and Southeast Alaska Population, 2009 – 2018



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

In past years, Juneau’s natural increase in population (births over deaths) more than compensated for a small out-migration of population. Beginning in 2016 and persisting through 2018, out-migration has surpassed the natural increase. However, the net population loss in the most recent period was significantly less than the two preceding periods.

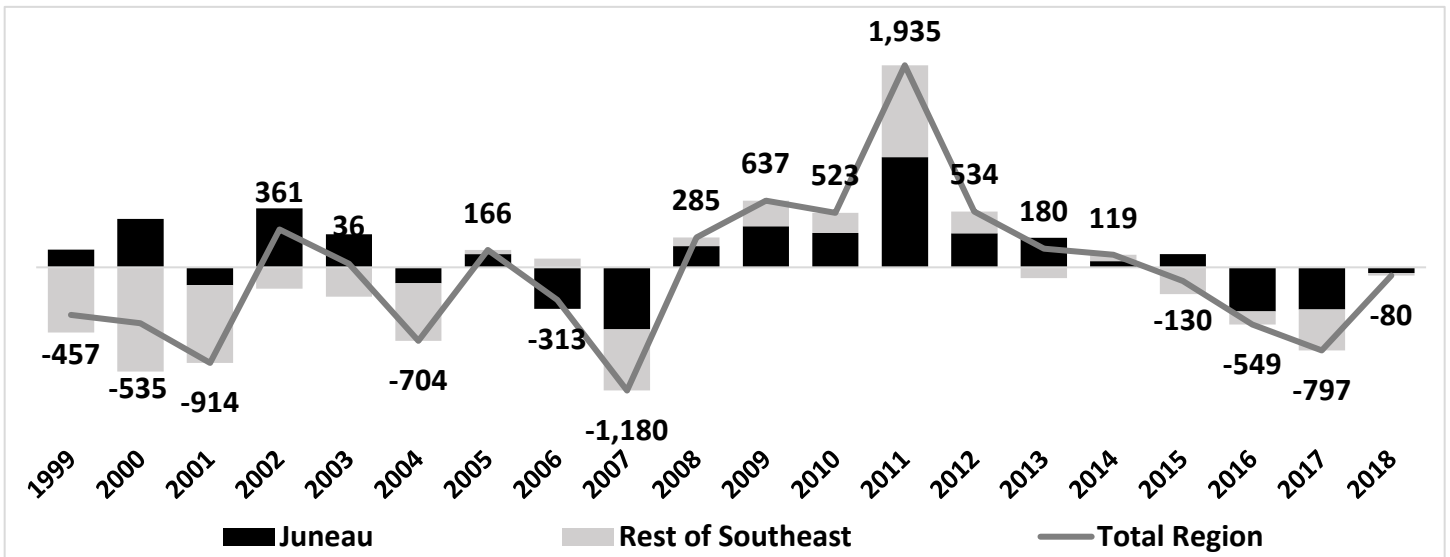
Figure 34: Annual Components of Population Change, Juneau 2013 – 2018



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

In 13 of the past 20 years, Juneau experienced population growth. This was the case for the rest of Southeast in only eight years. Before the Great Recession which began in December 2007, there were numerous years where the Juneau population increased while the rest of Southeast experienced declines. During the recession, this trend changed as both Juneau and the rest of Southeast experienced population growth for the next five years. After the recession, the rest of Southeast returned to its pre-recession trend of declining populations, joined by Juneau in the past three years.

Figure 35: Juneau and Southeast Alaska, Total Yearly Population Change, 1999 – 2018

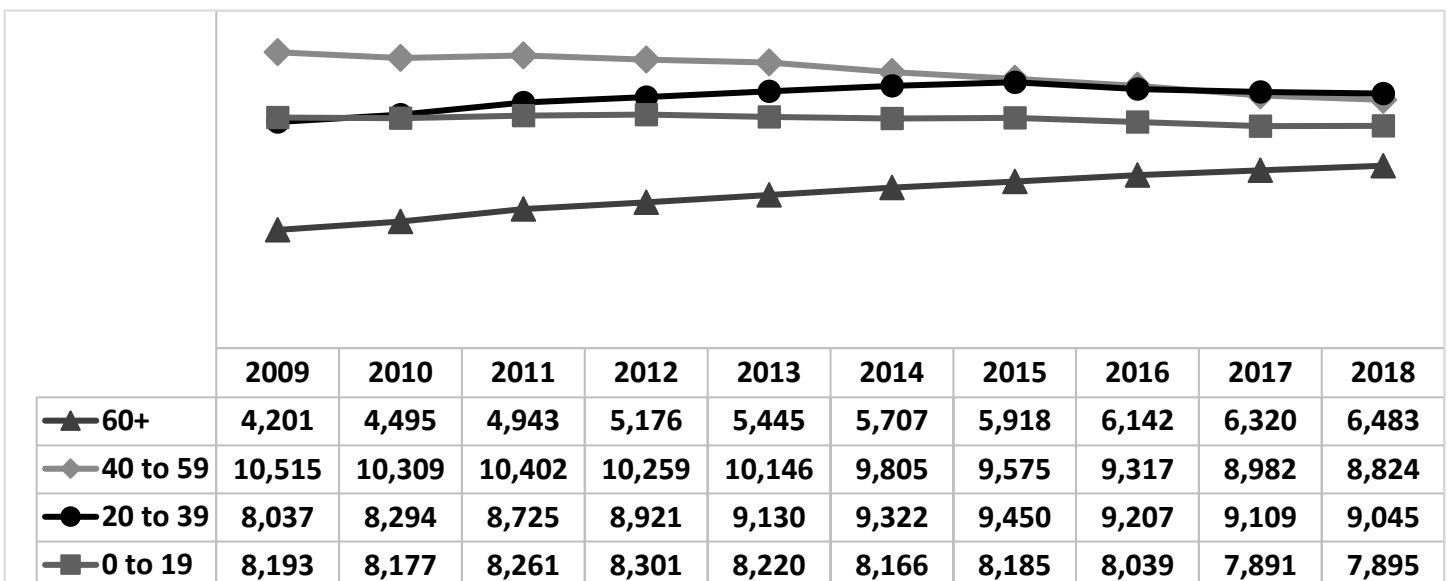


Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates

Juneau Population by Age Group

In 2018, Juneau had 9,045 residents age 20-39, the largest age demographic for the second year in a row, despite a 0.7% population decrease for the group from the previous year. The population 60 and over remained the fastest growing age demographic for the 17th consecutive year. Over the past decade, seniors went from 14 percent of Juneau’s population in 2009 to 20 percent in 2018. The senior population is projected to be 24 percent of Juneau’s population by 2025.

Figure 36: Juneau Population by Age Group, 2009 – 2018

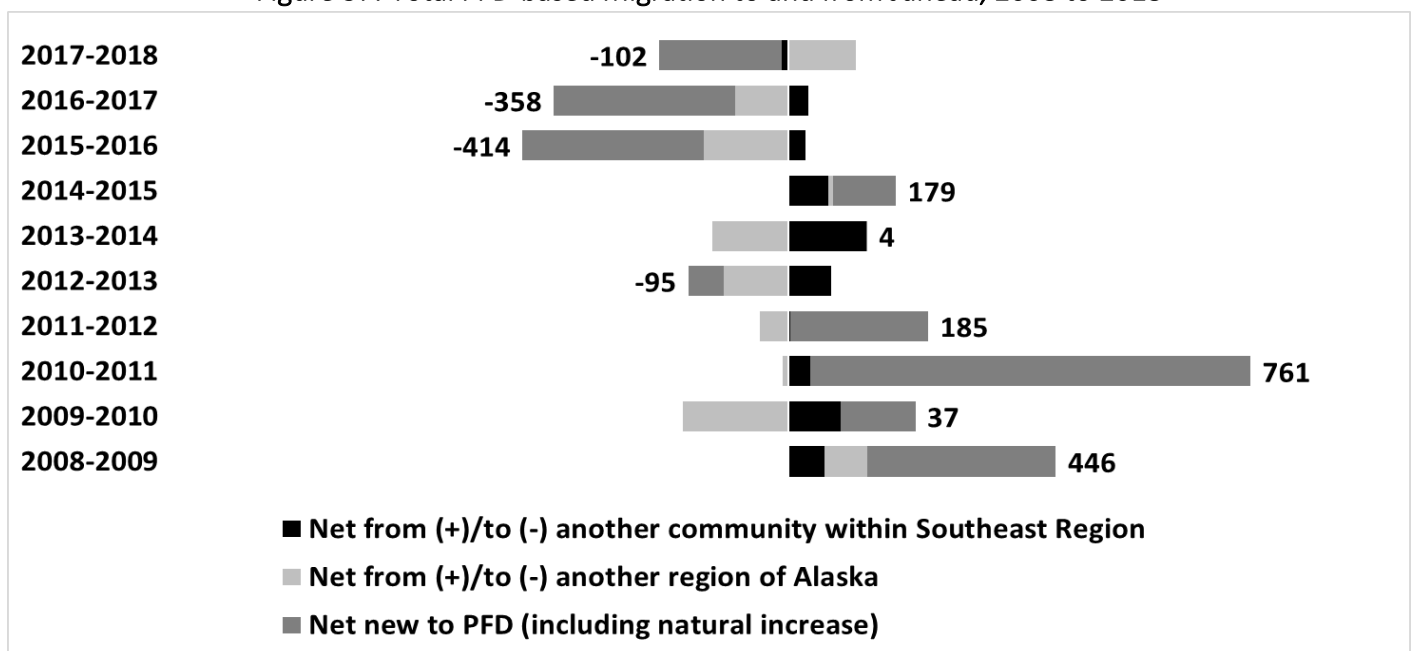


Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex" Dataset

Juneau Migration and Resident Transiency

The Alaska Department of Labor and Workforce Development uses Permanent Fund Dividend applications to track migration patterns between communities. Based on PFD filings, Juneau experienced a net loss of 102 people. PFD data tracks in-state movement of residents with accuracy, but lags data on new migrants from outside the state because of the one-year residency required. As in previous years, most people who moved to or from Juneau came from or went to locations outside of Alaska. Within Alaska, Juneau experienced net population increases from every region except for Southeast. Reduced employment opportunities in Anchorage and other regions of the state due to continued recession in those areas may be a key factor in Juneau's population gains from the rest of the state. Juneau's budget induced state job losses contributed to migration out of state.

Figure 37: Total PFD-based Migration to and from Juneau, 2008 to 2018



Source: Alaska Department of Labor and Workforce Development, Research and Analysis, Migration Data and Information, PFD-Based Migration to and from Cities and Places

Figure 38: PFD-based Migration to and from Juneau, 2017 to 2018

Region	Into Juneau	Out of Juneau	Net Migration
Anchorage and Mat-Su	257	189	68
Gulf Coast	47	39	8
Interior	67	42	25
North	4	3	1
Southwest	17	6	11
Haines Borough	18	29	-11
Hoonah-Angoon Census Area	40	48	-8
Ketchikan Gateway Borough	45	40	5
Petersburg Borough	14	15	-1
Prince of Wales - Hyder Census Area	21	24	-3
Sitka, City and Borough	59	38	21
Skagway, Municipality	4	5	-1
Wrangell, City and Borough	10	30	-20
Yakutat, City and Borough	9	2	7
Southeast Region Total	220	231	-11
Did not apply for PFD (including births and deaths)	2,012	2,216	-204

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

Regional Population Trends

Figure 39: Southeast Population by Borough and Census Designated Place 2014-2018

	July 2014	July 2015	July 2016	July 2017	July 2018	% change 2017-2018
Haines Borough	2,551	2,492	2,464	2,458	2,480	0.9%
Covenant Life CDP	72	71	58	69	53	-23.2%
Excursion Inlet CDP	9	9	14	12	13	8.3%
Haines CDP	1,811	1,766	1,738	1,735	1,755	1.2%
Lutak CDP	79	65	71	62	60	-3.2%
Mosquito Lake CDP	266	255	257	266	280	5.3%
Mud Bay CDP	184	192	195	204	206	1.0%
Balance	130	134	131	110	113	2.7%
Hoonah-Angoon Census Area	2,139	2,178	2,191	2,128	2,168	1.9%
Angoon City	420	429	411	406	410	1.0%
Elfin Cove CDP	16	15	14	14	12	-14.3%
Game Creek CDP	18	21	21	18	18	0.0%
Gustavus City	518	532	558	545	554	1.7%
Hoonah City	786	779	792	776	789	1.7%
Klukwan CDP	84	92	94	93	94	1.1%
Pelican City	77	80	79	67	68	1.5%
Tenakee Springs City	129	142	140	135	144	6.7%
Balance	91	88	82	74	79	6.8%
Juneau City and Borough	33,000	33,128	32,705	32,302	32,247	-0.2%
Ketchikan Gateway Borough	13,889	13,820	13,753	13,782	13,843	0.4%
Ketchikan City	8,351	8,299	8,189	8,141	8,157	0.2%
Saxman City	422	413	417	446	421	-5.6%
Balance	5,113	5,105	5,143	5,193	5,263	1.3%
Petersburg Census Area	3,198	3,177	3,174	3,137	3,198	1.9%
Kupreanof City	26	20	21	21	16	-23.8%
Petersburg City	2,954	2,922	2,932	2,885	2,948	2.2%
Balance	217	234	220	230	233	1.3%
Prince of Wales-Hyder Census	6,515	6,516	6,444	6,380	6,251	-2.0%
Coffman Cove City	175	194	202	198	168	-15.2%
Craig City	1,205	1,177	1,098	1,087	1,095	0.7%
Edna Bay CDP	47	48	41	43	43	0.0%
Hollis CDP	93	116	115	130	124	-4.6%
Hydaburg City	407	402	404	377	398	5.6%
Hyder CDP	91	83	83	89	80	-10.1%
Kake City	627	620	606	606	601	-0.8%
Kasaan City	76	86	92	84	81	-3.6%
Klawock City	803	819	812	833	777	-6.7%
Metlakatla CDP	1,446	1,439	1,435	1,424	1,398	-1.8%
Naukati Bay CDP	120	104	104	114	124	8.8%
Point Baker CDP	12	13	13	13	13	0.0%
Port Alexander City	45	62	55	53	55	3.8%
Port Protection CDP	56	54	53	35	31	-11.4%
Thorne Bay City	530	507	527	534	524	-1.9%
Whale Pass CDP	38	45	43	43	57	32.6%
Balance	744	747	761	717	682	-4.9%
Sitka City and Borough	9,066	8,899	8,905	8,748	8,652	-1.1%
Skagway Municipality	1,038	1,044	1,071	1,089	1,088	-0.1%
Skagway CDP	979	991	1,015	1,036	1,036	0.0%
Balance	59	53	56	53	52	-1.9%
Wrangell City and Borough	2,413	2,444	2,456	2,389	2,426	1.5%
Yakutat City and Borough	623	604	590	543	523	-3.7%
Southeast Total	74,432	74,302	73,753	72,956	72,876	-0.1%

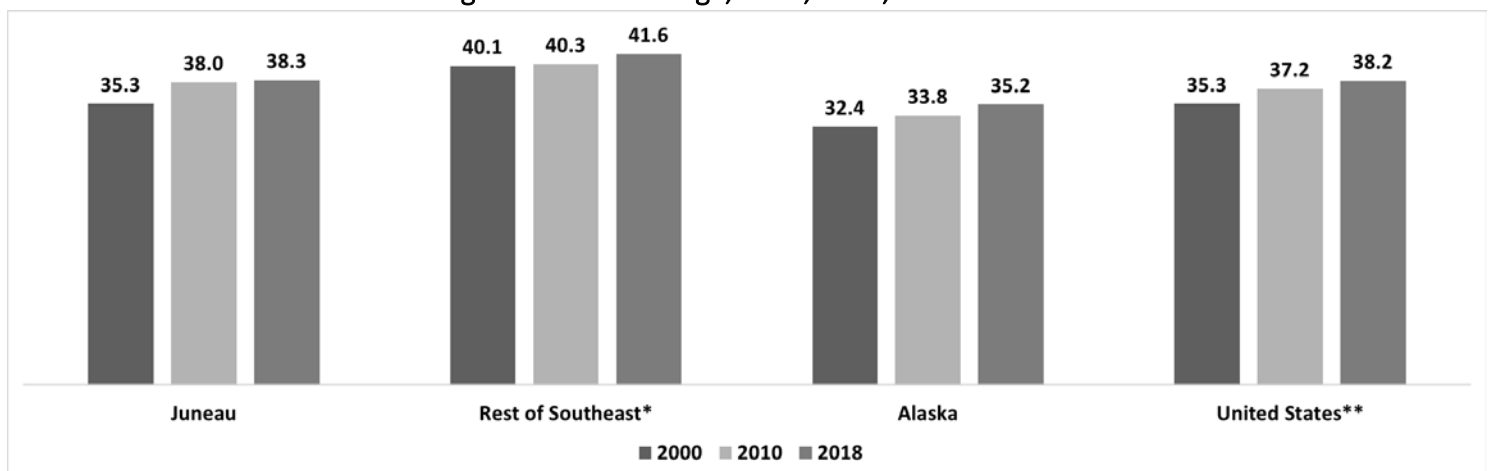
	July 2014	July 2015	July 2016	July 2017	July 2018	% change 2017-2018
Total excluding Juneau	41,432	41,174	41,048	40,654	40,629	-0.1%

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

Median Age

Juneau continues to age, with the median age increasing slightly from 38.2 to 38.3 over the previous year. Juneau’s population is older than the state average, but equal to that of the nation. The Southeast region, exclusive of Juneau, is significantly older than Juneau, the state of Alaska, and the nation.

Figure 40: Median Age, 2000, 2010, and 2018



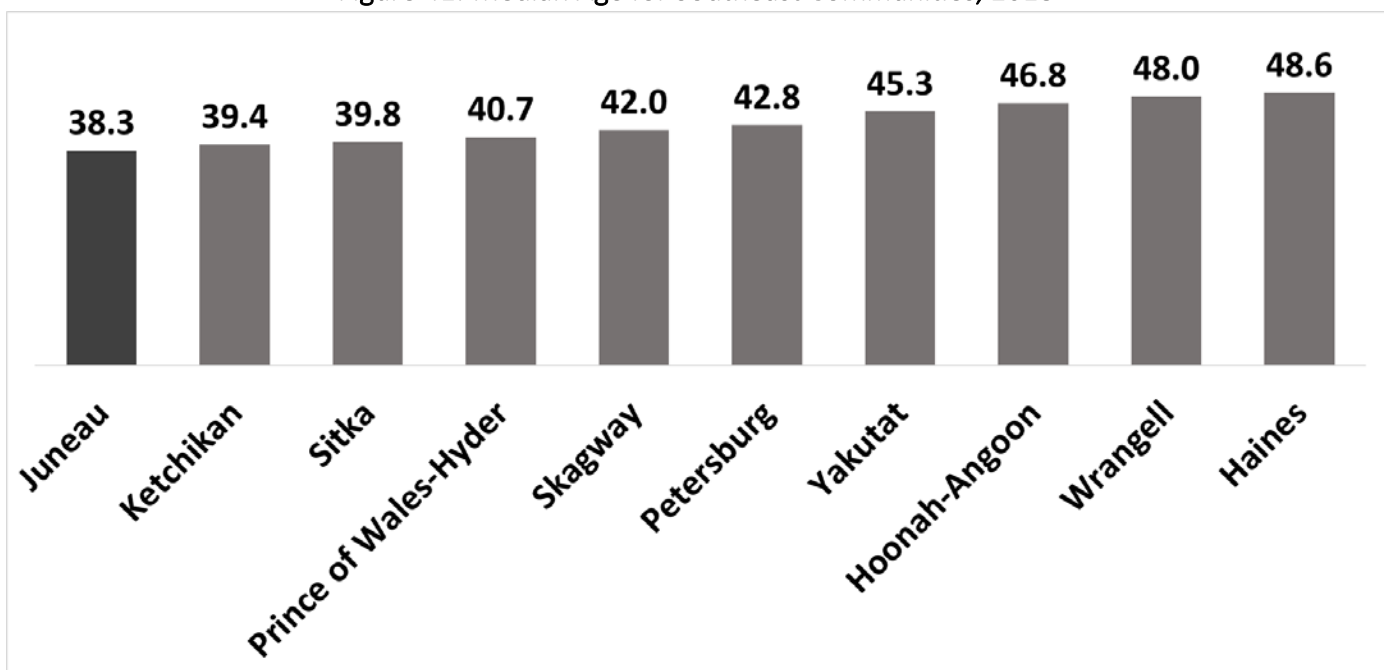
Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2018" Dataset; U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Single Year of Age and Sex for the United States, States, and Puerto Rico Commonwealth: April 1, 2010 to July 1, 2018

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

**US median age calculated by the US Census Bureau as of July 1, 2018.

Juneau has the youngest median age of all Southeast communities. Haines and Wrangell have the highest median age of all Alaskan communities.

Figure 41: Median Age for Southeast Communities, 2018



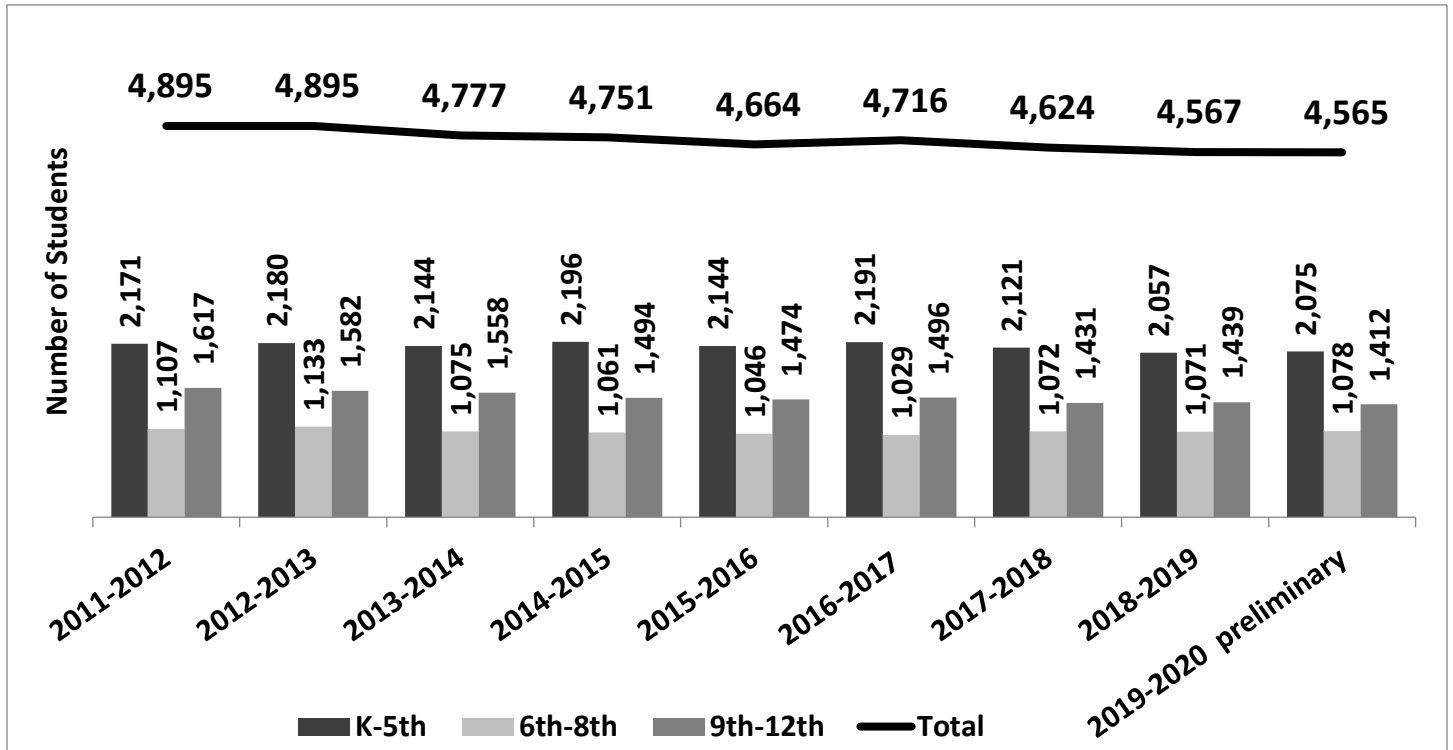
Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2018" Dataset

Education

Juneau School District Enrollment

The preliminary count of enrollment for K-12 in the Juneau School District for the 2019-2020 school year is 4,565 students, almost no change from the prior year.

Figure 42: Juneau School District K-12 Enrollment by Grade, FY12 – FY20 (Preliminary)

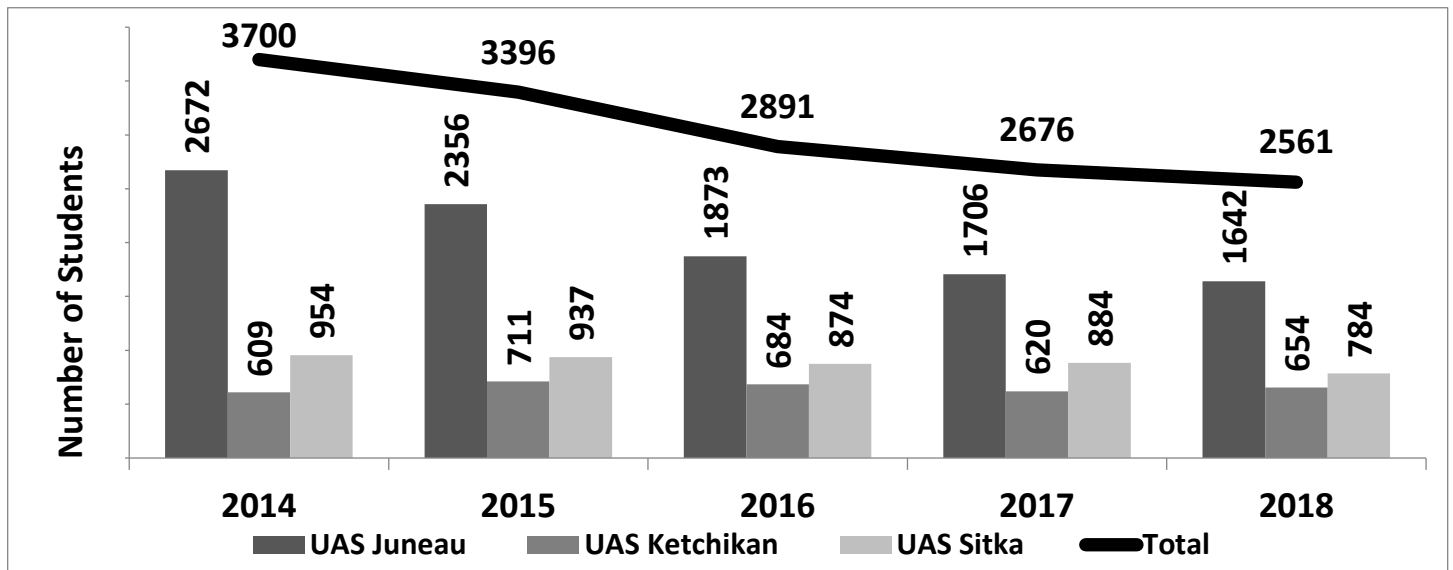


Source: Alaska Department of Education and Early Development Data Center, FY20 preliminary provided by Juneau School District

University of Alaska Southeast Enrollment

Enrollment at the University of Alaska Southeast (UAS) continued to decline with 2,561 students enrolled across all three campus locations, a more than 4 percent decrease from the prior year. The decrease in enrollment over the past years is a result of multiple factors, including the declining numbers of high school graduates across the entire state and a shift in course offerings to support degree completion.

Figure 43: University of Alaska Southeast Fall Enrollment, 2011 to 2018

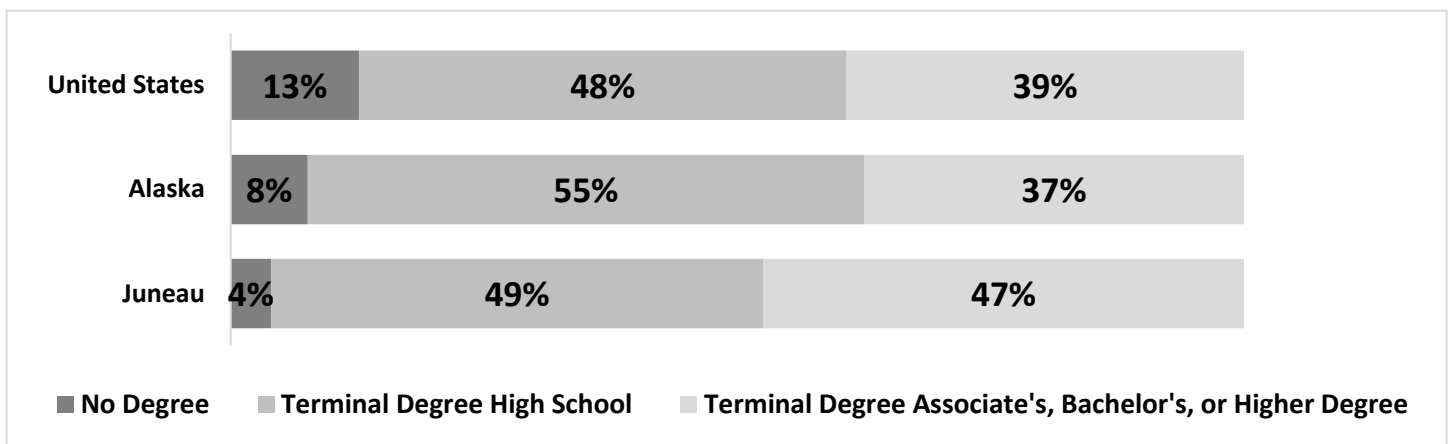


Source: University of Alaska Southeast; Note: Due to cross-registration, individual campus enrollments do not sum to total enrollment.

Educational Attainment

Juneau has a better educated population than the state of Alaska and the nation. The 2013-2017 five-year Census Bureau estimate shows that nearly half of Juneau’s population has earned an associate degree or higher. In comparison, both Alaska and the United States are populations where less than 40 percent of individuals have earned a degree beyond high school. Only 4 percent of Juneau residents 25 and older do not hold a high school diploma, half that of the statewide five-year average and less than a third of the national five-year average. Juneau’s educational attainment has increased substantially from the 2008-2012 five-year Census Bureau estimate, when only 43 percent of the population had a degree beyond high school. State-wide 35 percent of the population and nationally 36 percent had a degree beyond high school in that same time period.

Figure 44: Educational Attainment by Percent of Population 25 Years and Older



Source: U.S. Census Bureau, 2013 -2017 American Community Survey 5-Year Estimates, “Educational Attainment” S1501 Dataset.

Note: Dataset 2013-2017 is the most current estimate available.

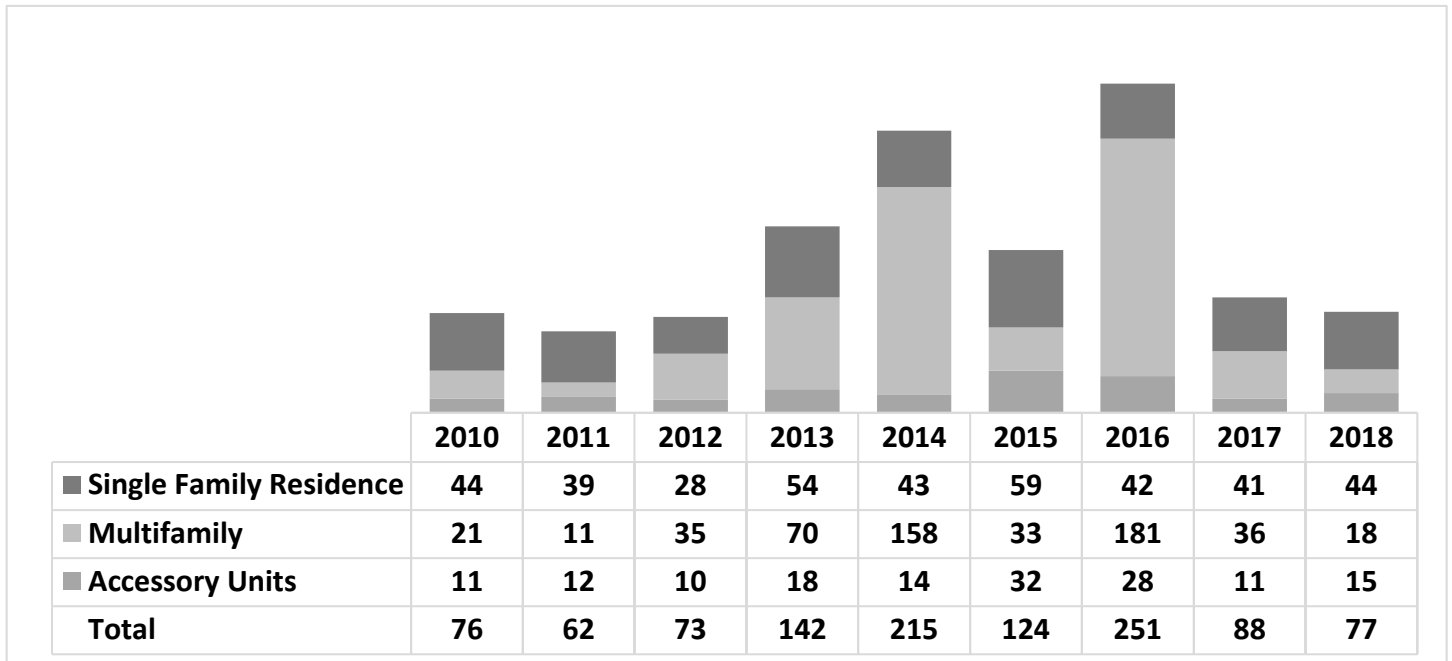
Construction and Housing

New Construction

Juneau New Housing Permits

In 2018, housing construction permits issued were below 2017, returning to levels last seen five years ago. The continued decrease in multifamily units permitted was the main reason for the decline in total units permitted.

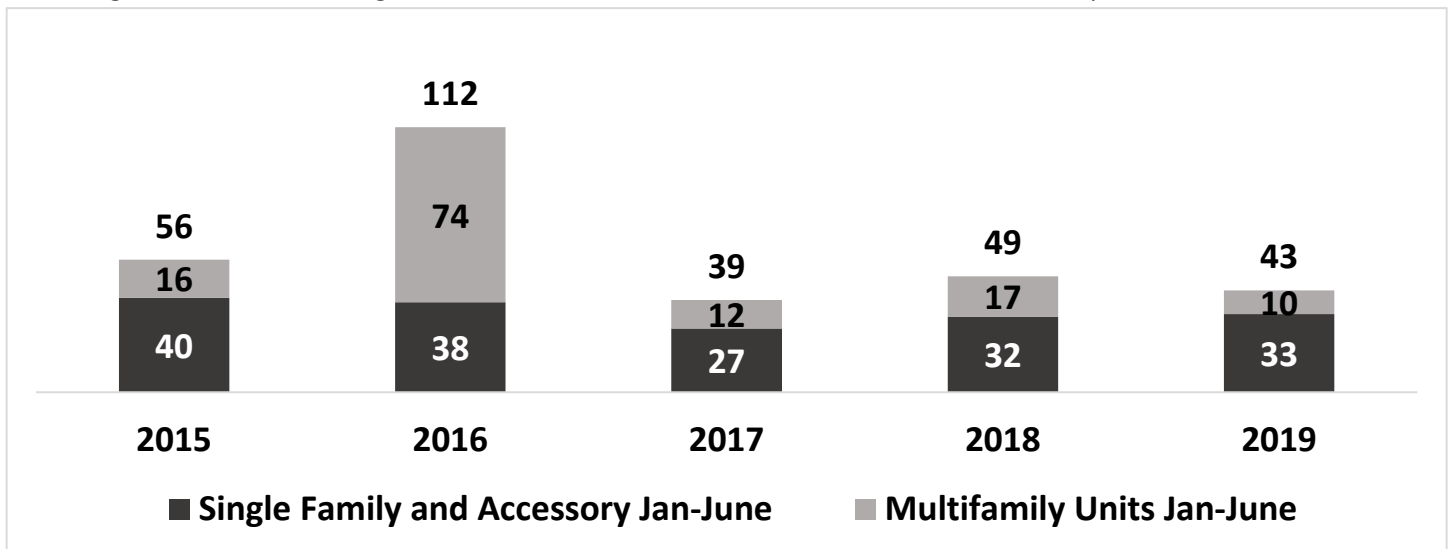
Figure 45: New Residential Housing Permits Issued 2010 to 2018



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

Comparing the first half of 2019 (January through June) with the same period for 2015 through 2018, shows permit levels to be in line with 2017 and 2018.

Figure 46: New Housing Units Permitted to be Built for First Half of Year, January – June 2015 to 2019



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

Southeast Alaska New Housing Construction

Juneau’s housing stock increased in 2018 by 72 units, a slight increase over 2017. This was largely due to the increase in annual single-family homes built over the prior year.

Figure 47: New Housing Units Built by Type of Structure, Select Communities 2015 – 2017

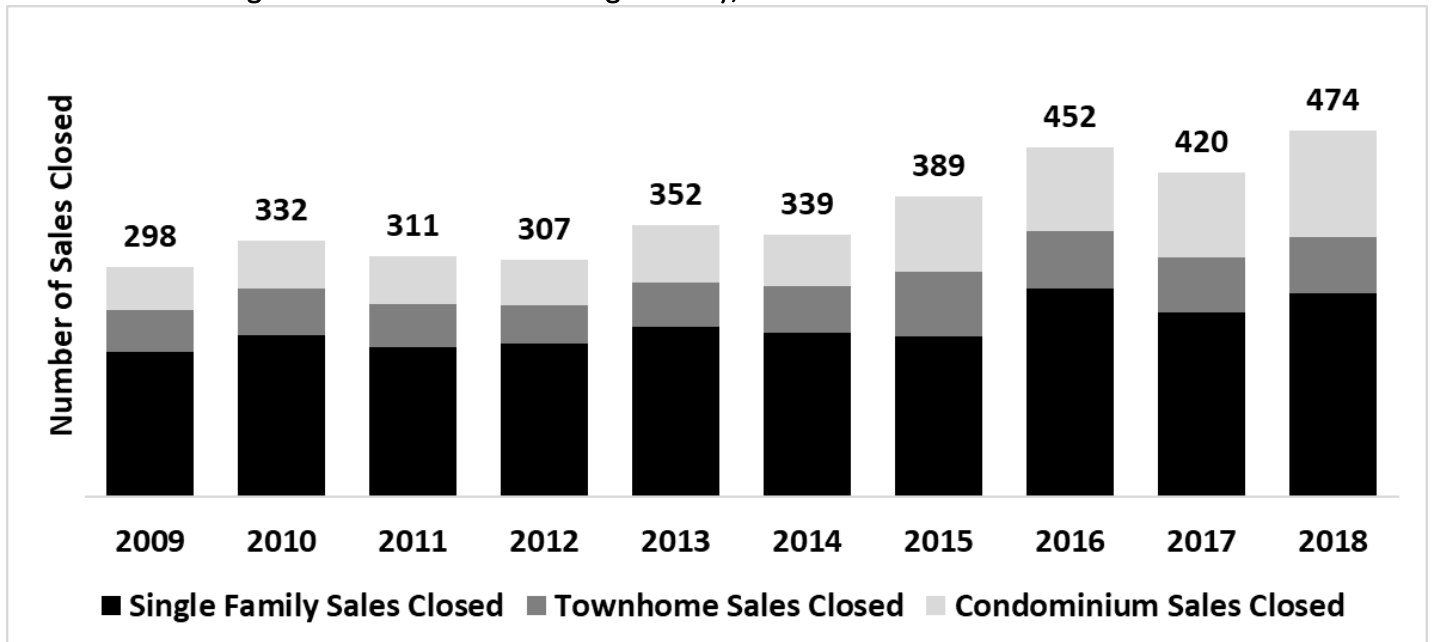
	Total Units 2016	Total Units 2017	Total Units 2018	Single Family 2016	Single Family 2017	Single Family 2018	Multi Family 2016	Multi Family 2017	Multi Family 2018
Craig	9	16	3	3	4	1	5	12	2
Haines	10	4	6	9	4	6	0	0	0
Juneau	241	68	72	69	45	53	172	22	19
Ketchikan Gateway Borough	46	30	48	22	17	21	24	13	27
Petersburg	6	11	14	5	7	9	0	2	5
Sitka Borough	28	27	18	12	23	14	12	4	2
Skagway	15	7	6	12	1	5	3	6	1
Wrangell Borough	6	4	7	6	3	5	0	1	2

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

Juneau Home Sales and Prices

Juneau’s home sale market was robust in 2018, with total transactions reaching a new high for the decade, passing the previous high set in 2016. While single family sales returned to 2016 volume, condominium sales accounted for the increase, with 138 units changing hands compared to 110 in 2017 and 108 in 2016.

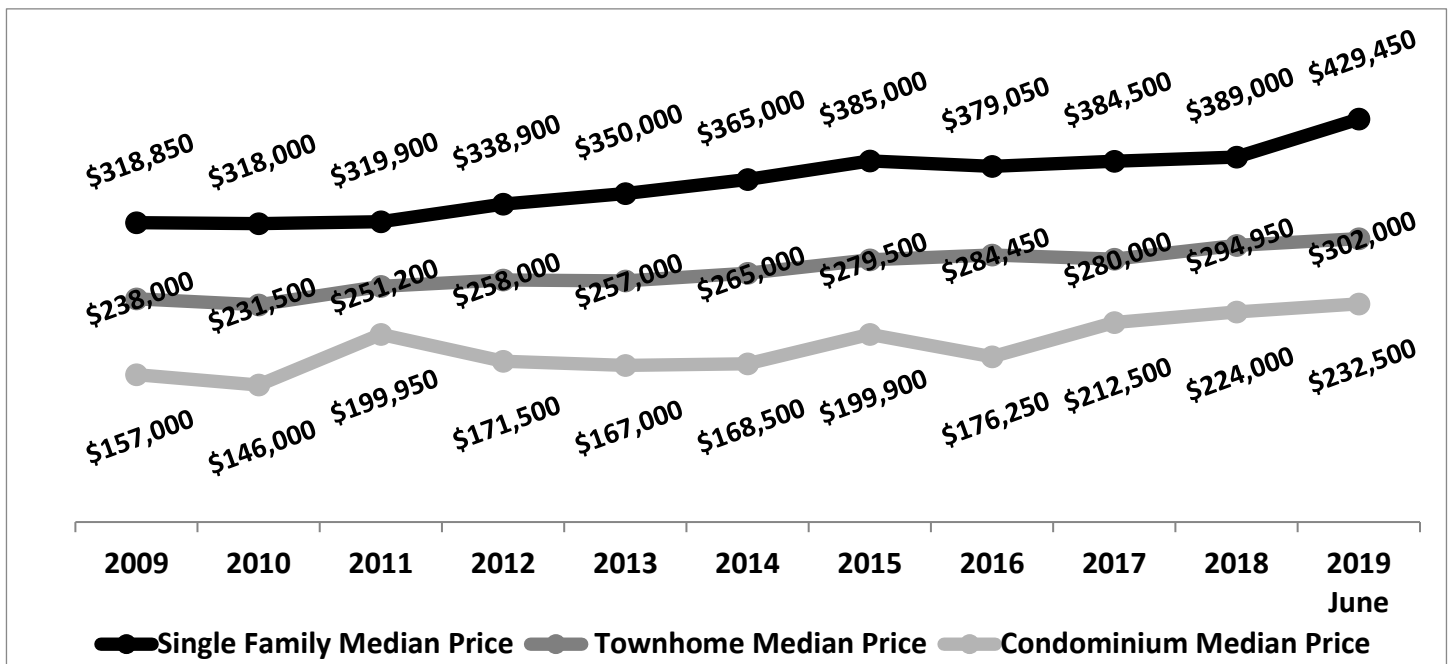
Figure 48: Sales Volume of Single Family, Attached Homes and Condominiums



Source: Southeast Alaska Multiple Listing Service.

The median transaction price of single-family homes increased by 1.2 percent from 2017 to 2018, and prices increased again in the first half of 2019 for all categories of housing. In 2017 the average days on market for all homes was 26 days, in 2018 this fell to 24 days, and in the first half of 2019 this number fell to 17 days. The rapid turnover for homes, less than 30 days, is an indication of a tight housing market in Juneau.

Figure 49: Median Price of Single Family, Attached Homes and Condominiums, 2013 – 2019 (June)

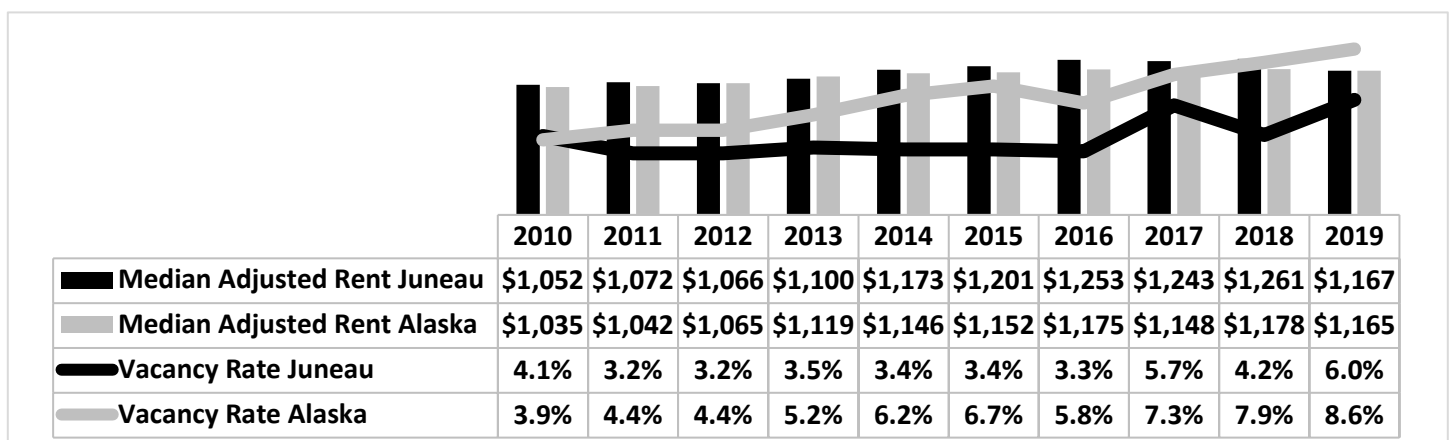


Sources: Southeast Alaska Multiple Listing Service.

Monthly Rental Costs (Adjusted Rates) and Vacancy Rates

Every March, the Alaska Department of Labor and Workforce Development surveys Alaska’s landlords for rental housing costs and vacancy rates for the Alaska Housing Finance Corporation. In March 2019, Juneau’s median rental price for all units fell by 7.5 percent to \$1,167, returning near levels seen in 2014. As vacancy rates in Alaska continue to rise (currently 8.6%), Juneau’s vacancy rate remains well below the state average. Juneau’s vacancy rate returned to 6 percent for the first time since 2009, a much more comfortable level compared to much of the last decade. According to the Alaska Department of Labor and Workforce Development, the ideal vacancy rate for a community is between 6 and 7 percent¹, because with more vacancies, renters have some choice in where to live, putting pressure on landlords to keep units in good repair and keep prices competitive.

Figure 50: All Units Median Adjusted Rental Prices and Vacancy Rate, March 2010 - 2019



Source: Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, and Alaska Housing Finance Corporation, 2019 Rental Market Survey (March); Note: Rental price is adjusted to include heat, light, hot water, water, garbage, sewer and snow removal, if one or more of these utilities is not included in the rent.

¹ Wiebold, Karinne. “Alaska’s Rental Market.” *Alaska Economic Trends*, Aug. 2016, pp. 4-7. Juneau and Southeast Alaska Economic Indicators and Outlook, August 2019