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Juneau by the Numbers 2014

	2014	% Change from 2013	
Employment and Wages			
Total Payroll (\$ Millions)	\$894	↑	2.3%
Government (\$ Millions)	\$422	↑	0.3%
Service Sector (\$ Millions)	\$333	↑	5.2%
Goods-Producing (\$ Millions)	\$139	↑	1.5%
Average Wage	\$49,764	↑	1.1%
Total Wage and Salary Employment	17,980	-	-0.1%
Service Sector	9,168	↑	1.1%
Goods-Producing	1,832	↑	0.3%
State of Alaska	4,269	-	-0.1%
Local and Tribal	2,004	↓	-2.8%
Federal Civilian	708	↓	-7.0%
Fishermen and Crew (Juneau Residents)	764	↑	3.3%
Unemployment	5.1%	↑	2.0%
Demographics			
Population	33,026	-	0.0%
60 - 79 Year-Olds	5,139	↑	5.0%
40 - 59 Year-Olds	9,817	↓	-3.6%
20 - 39 Year-Olds	9,327	↑	1.8%
0 - 19 Year-Olds	8,171	↓	-1.0%
Median Age	37.7	↓	-0.5%
Business Sales			
Gross Business Sales (\$ Millions)	\$2,418	↑	1.0%
Tourist Related Business Sales	\$256	↑	1.9%
Construction and Housing			
New Housing Unit Permits	205	↑	69%
Median Price of Single Family Detached Home	\$365,000	↑	4.3%
Transportation			
Cruise Passenger Arrivals	953,100	↓	-3.3%
Air Passenger Arrivals	306,717	↑	5.6%
Ferry Passenger Arrivals	72,187	↓	-7.6%

Southeast Alaska by the Numbers 2014

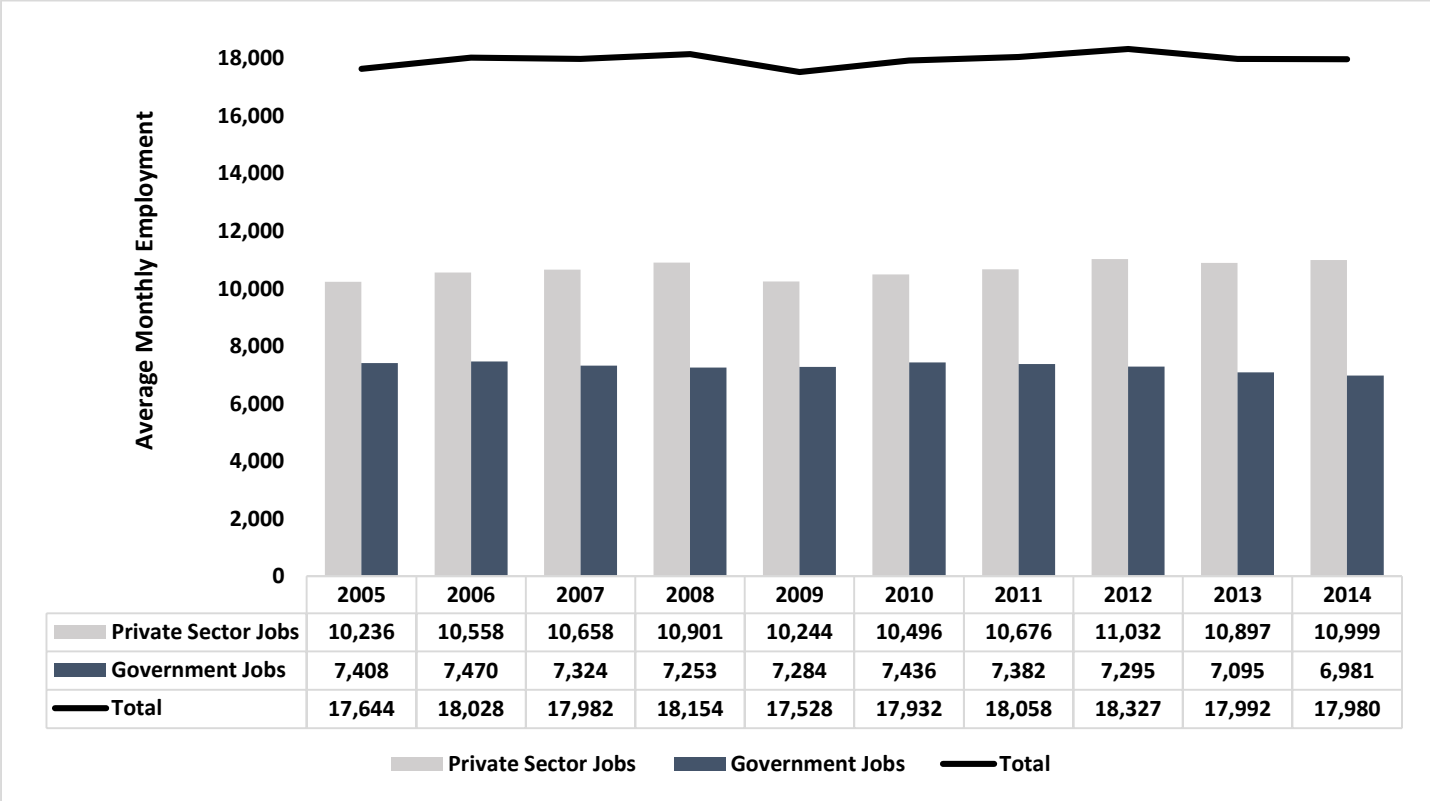
	2014	% Change from 2013	
Employment and Wages			
Total Payroll (\$ Millions)	\$1,968	↑	2.0%
Government (\$ Millions)	713	↑	1.2%
Service Sector (\$ Millions)	680	↑	3.4%
Goods-Producing (\$ Millions)	304	↑	0.7%
Average Wage	\$45,387	↑	2.1%
Total Wage and Salary Employment	37,401	-	-0.1%
Service Sector	19,337	↑	0.2%
Goods-Producing	5,092	↑	0.9%
State of Alaska	5,504	↓	-0.2%
Local and Tribal	5,988	↓	-0.3%
Federal Civilian	1,480	↓	-5.6%
Fishermen and Crew (Southeast Residents)	4,838	↓	-0.6%
Unemployment	7.1%	↑	2.9%
Demographics			
Population	74,280	-	0.0%
Without Juneau	41,254	-	-0.1%
Construction and Housing			
New Housing Units Built	313	↑	25.7%
Commercial Seafood Industry			
Pounds Landed by Resident Fisherman (Thousands)	199,415	↓	-26.8%
Ex Vessel Value for Resident Fisherman (\$Thousands)	\$194,196	↓	-13.9%

Employment and Earnings

While the private sector gained just over 100 jobs in 2014, Juneau’s employment numbers were slightly down overall due to the continued loss of both federal and local government jobs. Private sector wages gained an average of 1.5 percent, and despite job losses, government wages were up slightly in 2014, when adjusted for inflation.

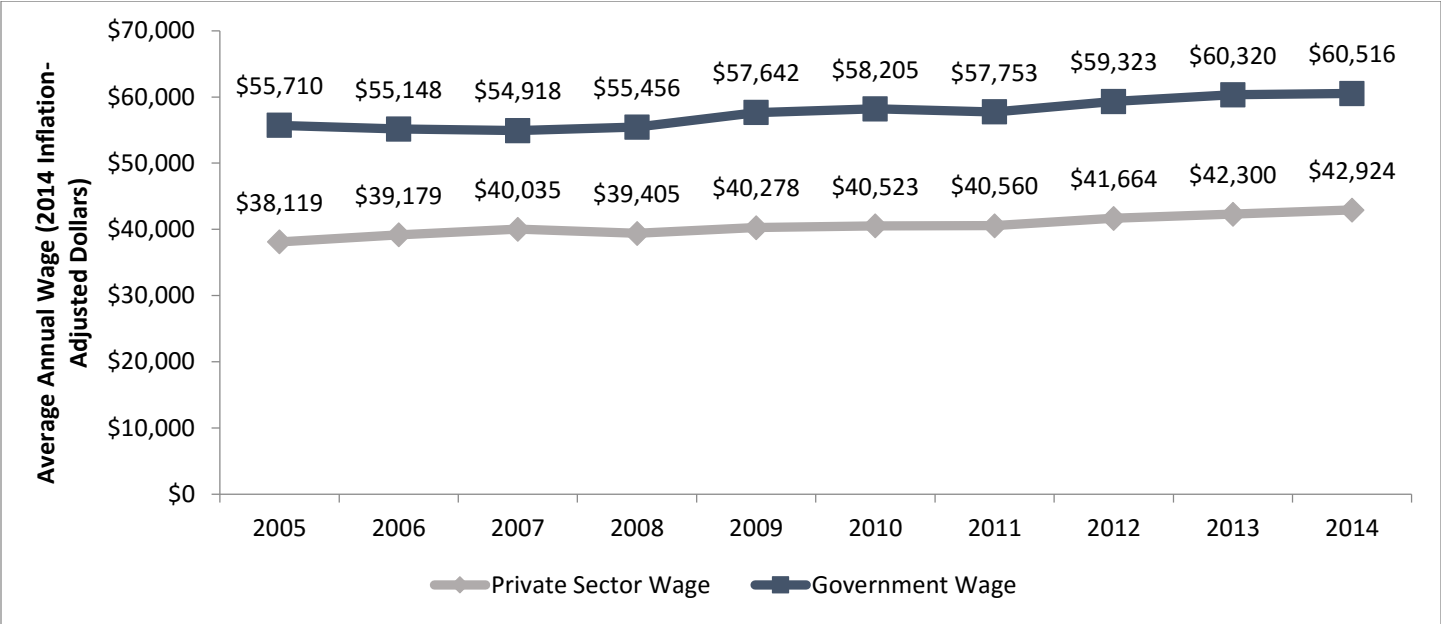
Looking ahead, Juneau’s economy will be impacted by the legislature’s approach to solving the state’s budget deficit. If cuts to the state budget result in job terminations in Juneau, and the federal and local government continues to reduce employment, the community will experience out migration that will have a detrimental effect on its economy. Juneau’s private sector, dominated by tourism, fishing and mining, has limited capacity to absorb potential displaced friends and neighbors. While the leisure and hospitality industry again led job growth in the private sector, the average monthly wage in this industry was \$1,549 in 2014, while the average wage in the shrinking government sector was \$5,043. In the years to come, Juneau must take steps to diversify its economy with a focus on high paying job sectors.

Figure 1: Juneau Private and Government Sector Employment Trends, 2005 - 2014



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

Figure 2: Juneau Private and Government Sector Average Annual Wage Trends
2005 -2014 (2014 Inflation-Adjusted Dollars)

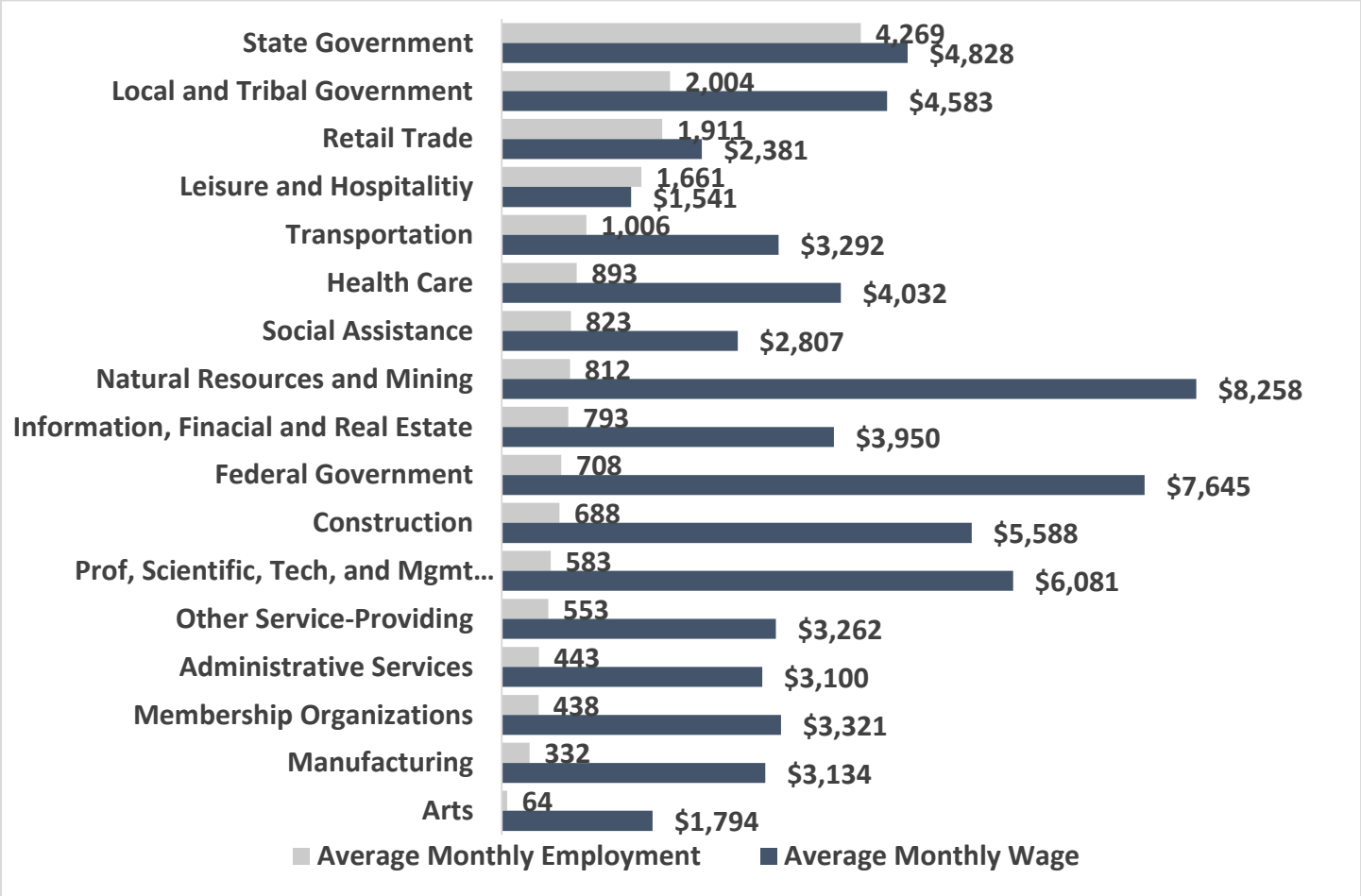


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Economic Diversity

The distribution of wage and salary jobs, along with the average industry pay, are shown in Figure 3. The highest paying jobs are in natural resources and mining (dominated by the mining industry) and the federal government, but, combined, only 9 percent of jobs are in these two sectors.

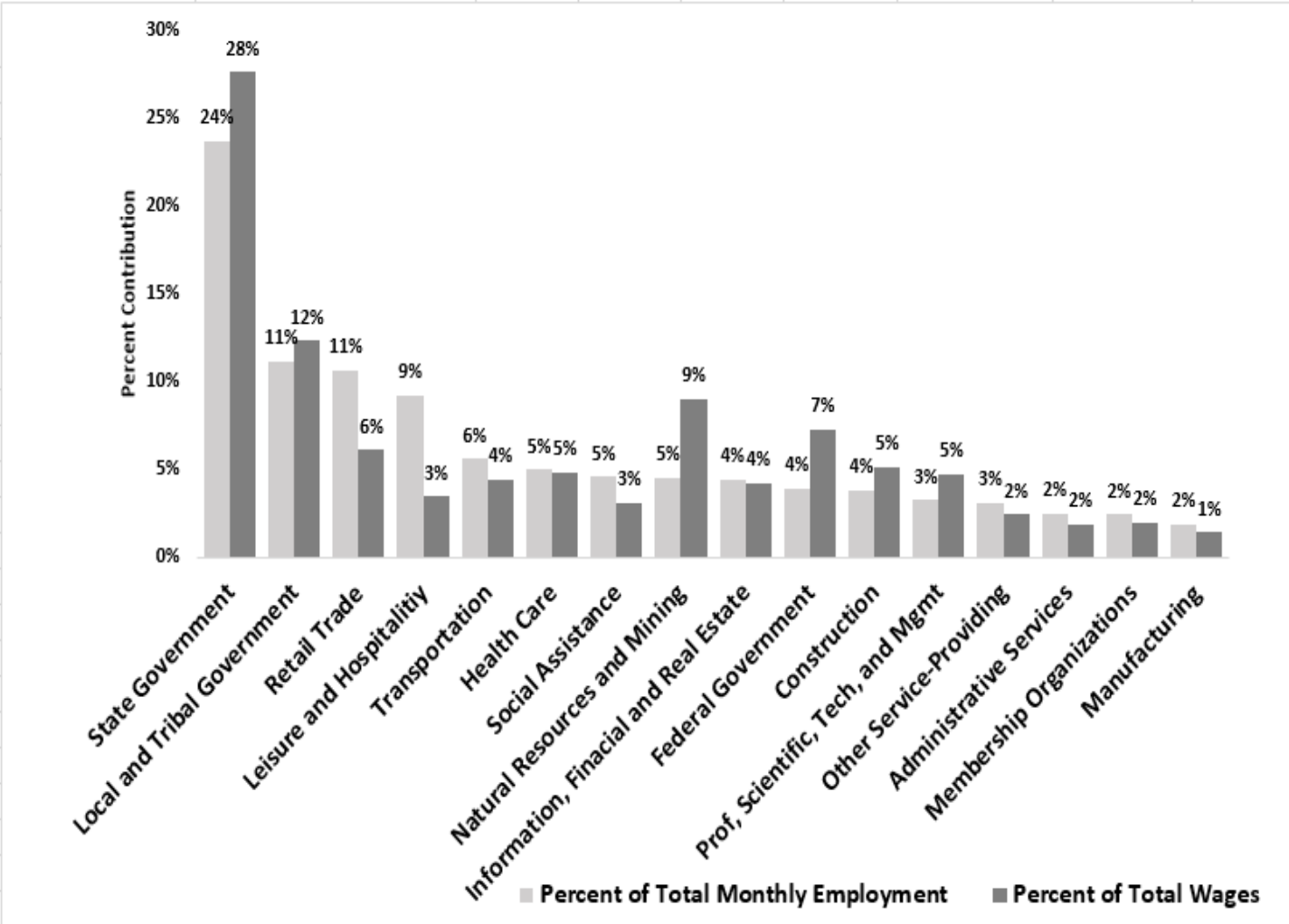
Figure 3: Average Monthly Employment and Wage Comparison by Sector, Juneau 2014



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

The three largest employment sectors, providing close to half of all wage and salary jobs in Juneau, are state government (24 percent), local and tribal government (11 percent), and retail trade (11 percent). Within the private sector, retail trade along with leisure and hospitality, transportation, and private health care and social assistance account for almost 60 percent of jobs.

Figure 4: Percent Contribution by Economic Sector to Total Employment and Total Earnings Juneau, 2014

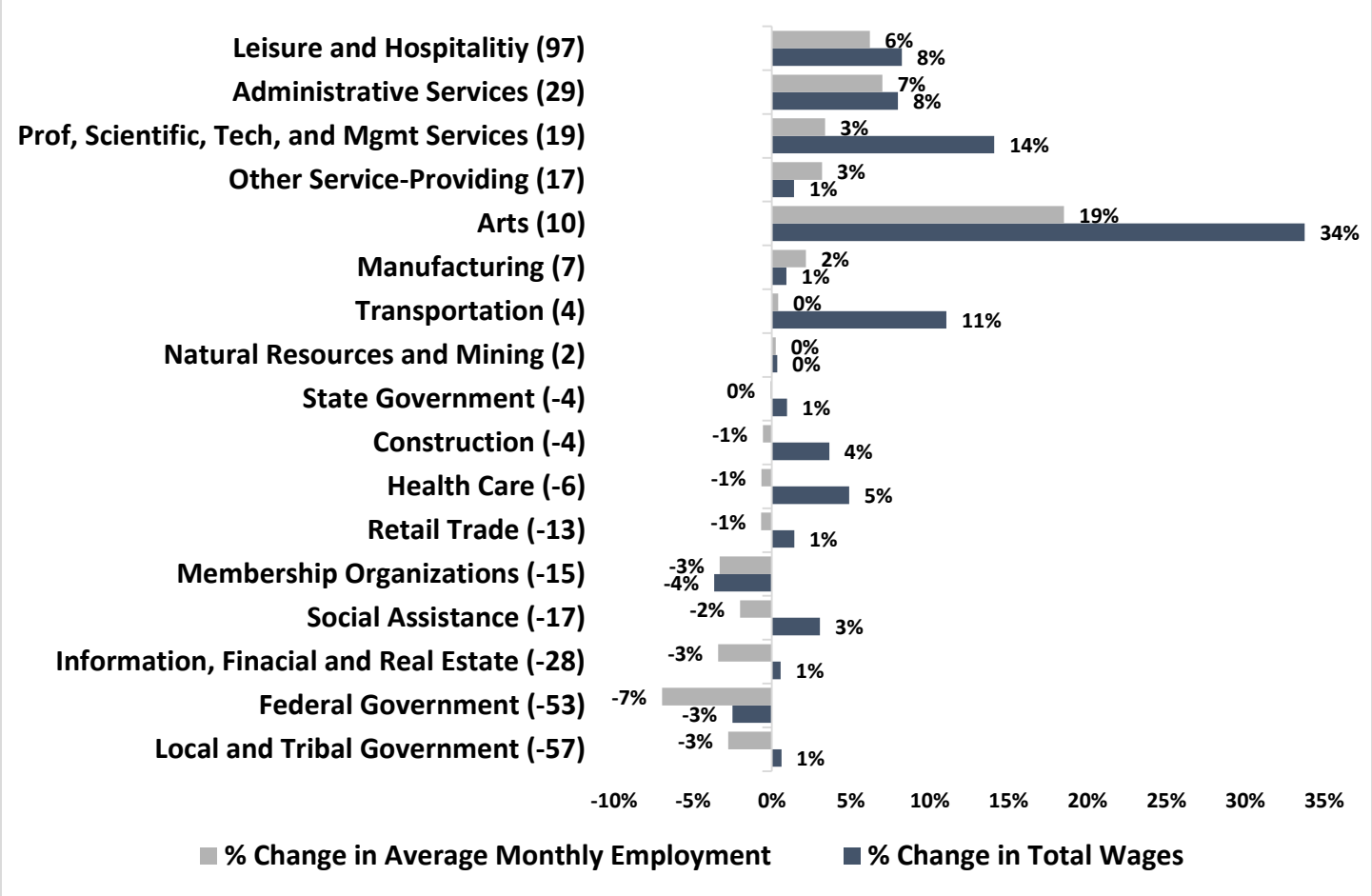


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Job Creation

Juneau continued to add lower paying jobs while losing higher paying ones in 2014. Juneau’s leisure and hospitality industry added the most jobs (97), a 6 percent expansion for the sector in job count and an 8 percent expansion in total wages paid. Local and tribal government lost the most jobs (57) for a third straight year, contracting by 3 percent, but the industry still increased total wages paid by 1 percent. The federal government also continued to lose jobs in 2014, with a 7 percent contraction (53 jobs) and a 3 percent reduction in total wages paid.

Figure 5: Percent Increase/Decrease in Employment and Earnings by Sector, Juneau 2013-2014



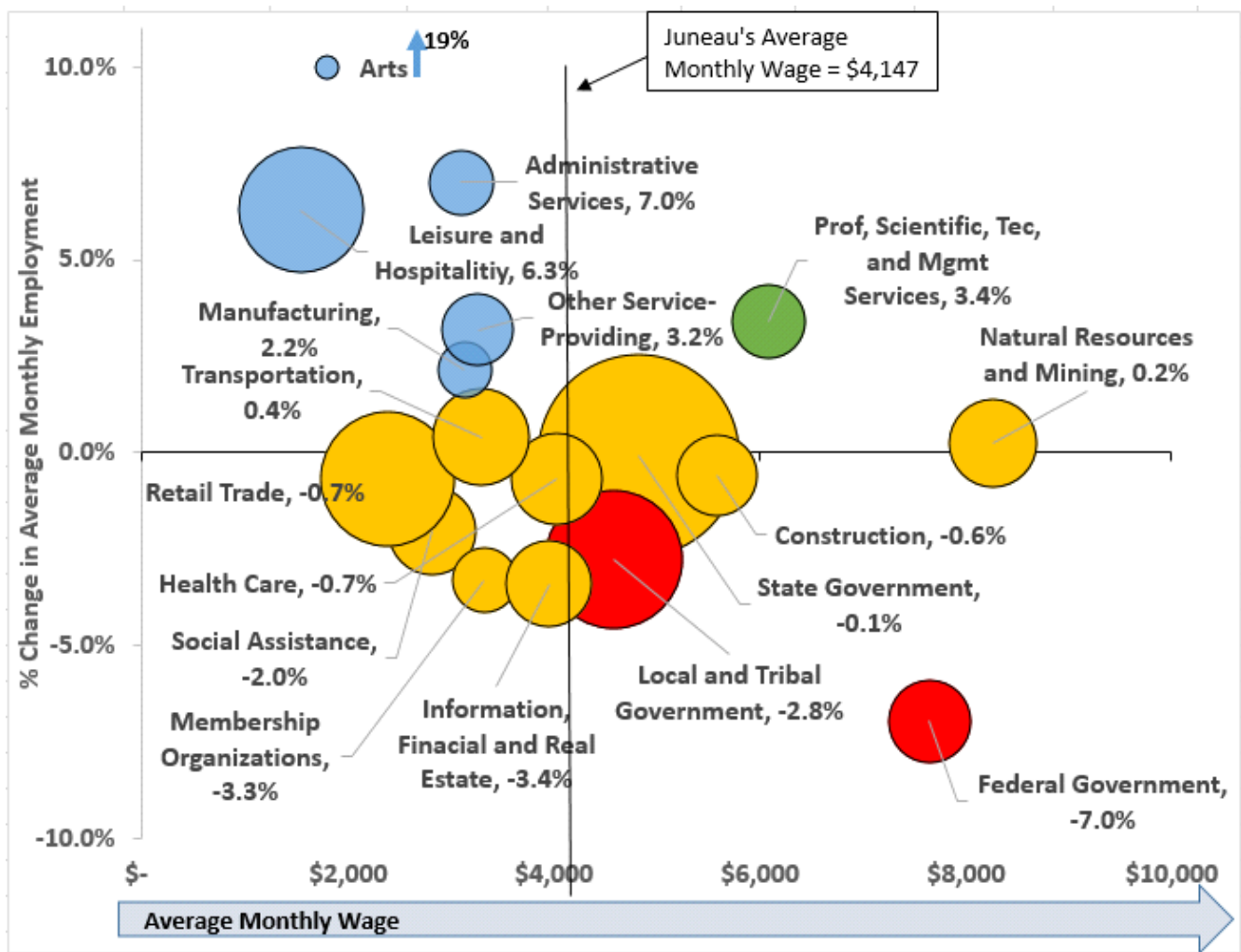
Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages **Note:** Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital.

Juneau’s economy prospers when high paying jobs increase in the community. In Figure 6, industry sectors with above average salary or wages and job expansion are located in the top right half of the chart, while high wage or salary sectors with job contraction are seen in the bottom half of the chart. Growth in the Professional, Scientific, Technical and Management sector is a bright spot in the economy, while declines in federal and local government are cause for concern.

Here is how Figure 6 works:

- The size of the circle represents the number of jobs in each industry today. State government, with the largest circle, is the largest employer in Juneau. Local Government is the second largest employer and Retail Trade is the third.
- The horizontal axis lines up the circles from left to right by the average monthly wage in the industry. Mining jobs pay the highest wages in Juneau. The federal government pays the second highest.
- The circle’s vertical position, either above the center line or below the center line, shows the percent expansion or contraction over the last year for each industry. Leisure and Hospitality expanded by over 6 percent, an increase of 97 jobs, adding the most jobs of any industry. Federal government, at the bottom of the chart, contracted by 7 percent, losing 53 jobs. Local and tribal government, with almost three percent contraction, lost 57 jobs.

Figure 6: Job Gains and Losses and Average Monthly Wage, Juneau 2013 – 2014



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

Figure 7: Average Monthly Employment and Total Earnings Growth by Sector, Juneau 2013 – 2014

	Average Employ-ment 2013	Average Employ-ment 2014	% Change	Total Earnings 2013	Total Earnings 2014	% Change
Natural Resources and Mining	810	812	0.2%	\$80,205,983	\$80,470,161	0.3%
Construction	692	688	-0.6%	\$44,519,736	\$46,136,204	3.6%
Manufacturing	325	332	2.2%	\$12,372,736	\$12,486,771	0.9%
Total Goods Producing	1,827	1,832	0.3%	\$137,098,455	\$139,093,136	1.5%
Retail Trade	1,924	1,911	-0.7%	\$53,846,849	\$54,607,617	1.4%
Leisure and Hospitality	1,564	1,662	6.3%	\$28,374,275	\$30,711,658	8.2%
Transportation	1,002	1,006	0.4%	\$35,783,286	\$39,741,315	11.1%
Private Health Care	899	893	-0.7%	\$41,192,449	\$43,210,158	4.9%
Social Assistance	840	823	-2.0%	\$26,904,832	\$27,724,925	3.0%
Information, Financial, and Real Estate	821	793	-3.4%	\$37,592,782	\$37,386,493	0.6%
All Other Services	536	553	3.2%	\$21,346,802	\$21,647,566	1.4%
Professional, Scientific, Tech. and Management	564	583	3.4%	\$37,286,916	\$42,542,335	14.1%
Membership Organizations	453	438	-3.3%	\$18,118,796	\$17,455,783	-3.7%
Administrative Services	414	443	7.0%	\$15,259,729	\$16,478,237	8.0%
Arts	54	64	18.5%	\$1,030,022	\$1,377,804	33.8%
Total Service Providing	9,071	9,168	1.1%	\$316,530,449	\$333,090,180	5.2%
Total Private Sector	10,897	10,999	0.9%	\$453,628,904	\$472,183,316	4.1%

	Average Employ- ment 2013	Average Employ- ment 2014	% Change	Total Earnings 2013	Total Earnings 2014	% Change
State Government	4,273	4,269	-0.1%	\$244,958,241	\$247,318,367	1.0%
Local and Tribal Government	2,061	2,004	-2.8%	\$109,562,395	\$110,221,943	0.6%
Federal Civilian Government	761	708	-7.0%	\$66,618,104	\$64,949,774	-2.5%
Total Government	7,095	6,981	-1.6%	\$442,404,629	\$422,490,084	0.3%
Total Industries	17,992	17,980	-0.6%	\$874,768,204	\$894,673,400	2.3%

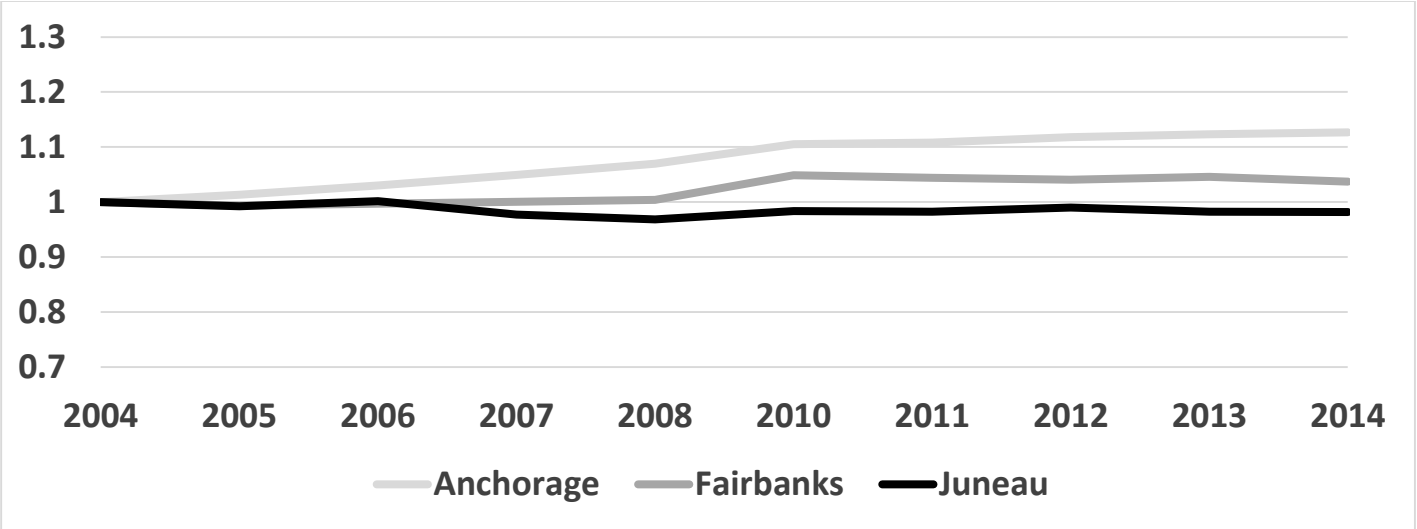
Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; **Note:** Local Government includes such enterprises as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital

Government Employment

Juneau lost a net 114 government jobs in 2014. While overall state job losses were held to a minimum, the University of Alaska had the greatest increase in employment for the year and Labor and Workforce Development had the greatest decrease. Federal agencies that experiences the most job losses were the Department of Transportation and the Department of the Interior.

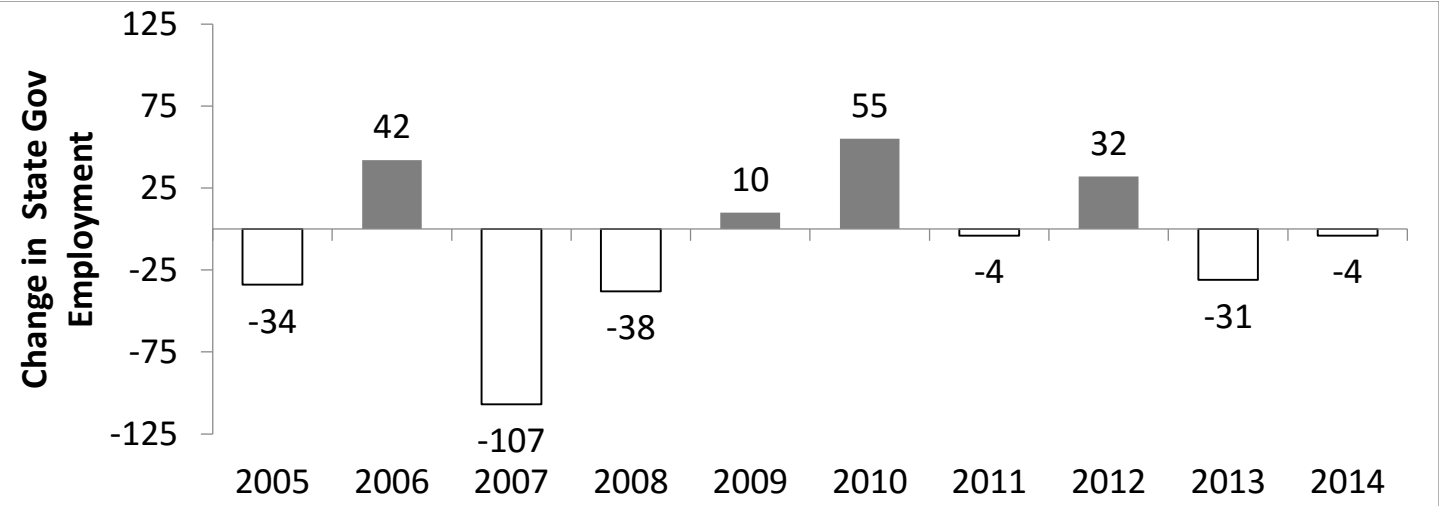
State Government Employment

Figure 8: Change in State Government Employment in Juneau, Anchorage and Fairbanks
2004-2014, Indexed to 2004



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

Figure 9: Change in Average Annual State Government Employment in Juneau, 2005 - 2014



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

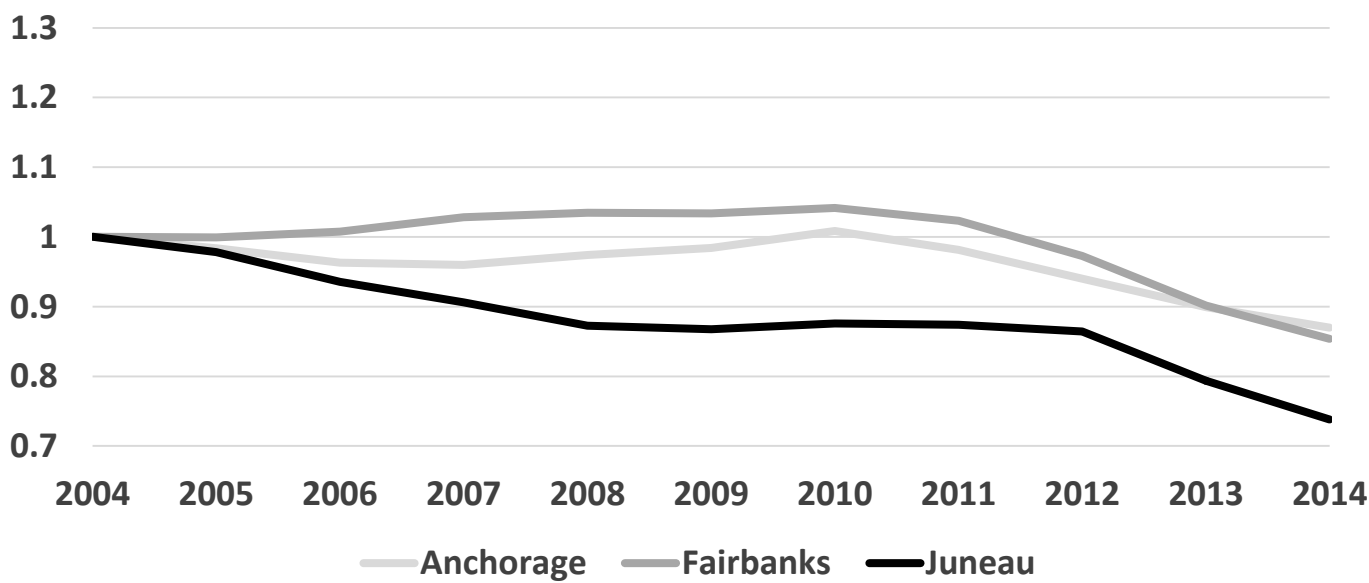
Figure 10: Average Annual State Government Employment in Juneau by Department, 2011 - 2014

	2011	2012	2013	2014	% Change 2011- 2014
Transportation and Public Facilities	672	712	704	695	3.4%
Health and Social Services	525	523	536	531	1.1%
University of Alaska	447	445	446	458	2.5%
Administration	459	450	442	455	-0.9%
Fish & Game	313	310	312	313	0.0%
Labor & Workforce Development	317	306	291	261	-17.7%
Legislative Affairs	250	250	251	254	1.6%
Education	226	229	230	223	-1.3%
Revenue	160	163	165	170	6.3%
Community and Economic Development	169	172	167	165	-2.4%
Environmental Conservation	129	138	136	132	2.3%
Corrections	113	117	121	125	10.6%
Office of the Governor	71	88	65	82	15.5%
Law	84	83	82	81	-3.6%
Natural Resources	45	41	42	45	0.0%
Public Safety	41	42	43	42	2.4%
Court System	35	36	35	32	-8.6%
Legislative Audit	27	24	23	23	-14.8%
AK Housing Finance Corp	11	11	11	10	-9.1%
All Other	177	164	172	172	-2.8%%

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

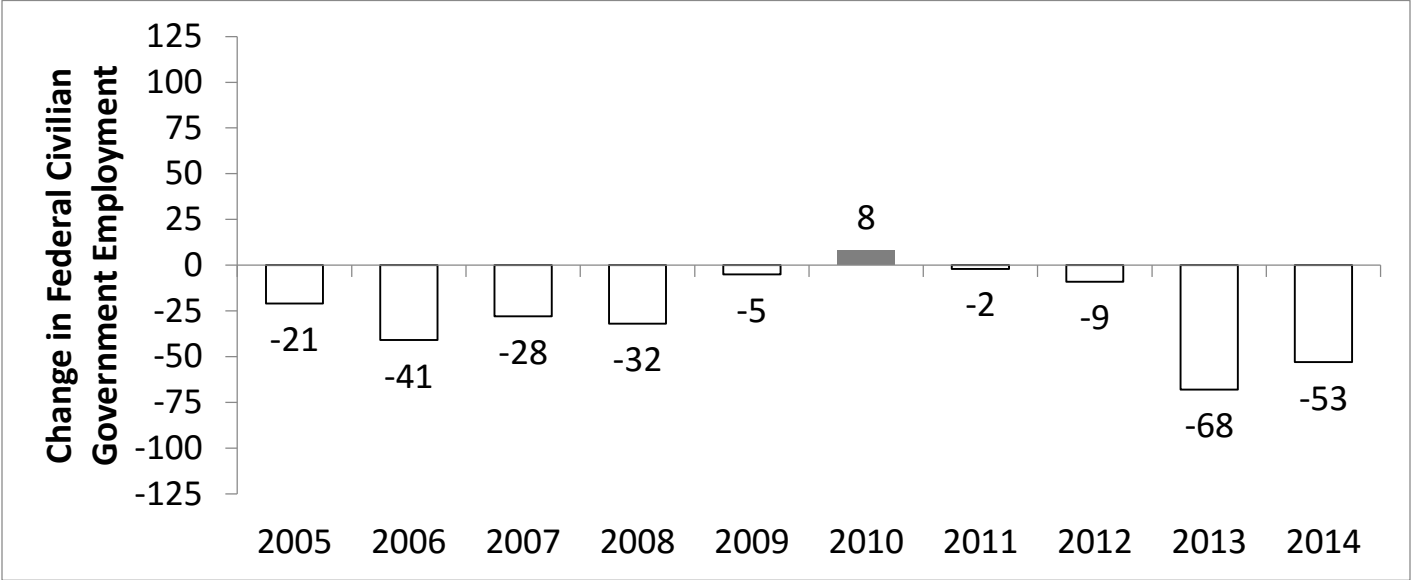
Federal Government Employment

Figure 11: Annual Change in Federal Government Employment in Juneau, Anchorage and Fairbanks
2004-2014, Indexed to 2004



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

Figure 12: Annual Change in Federal Civilian Government Employment in Juneau, 2005 – 2014



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

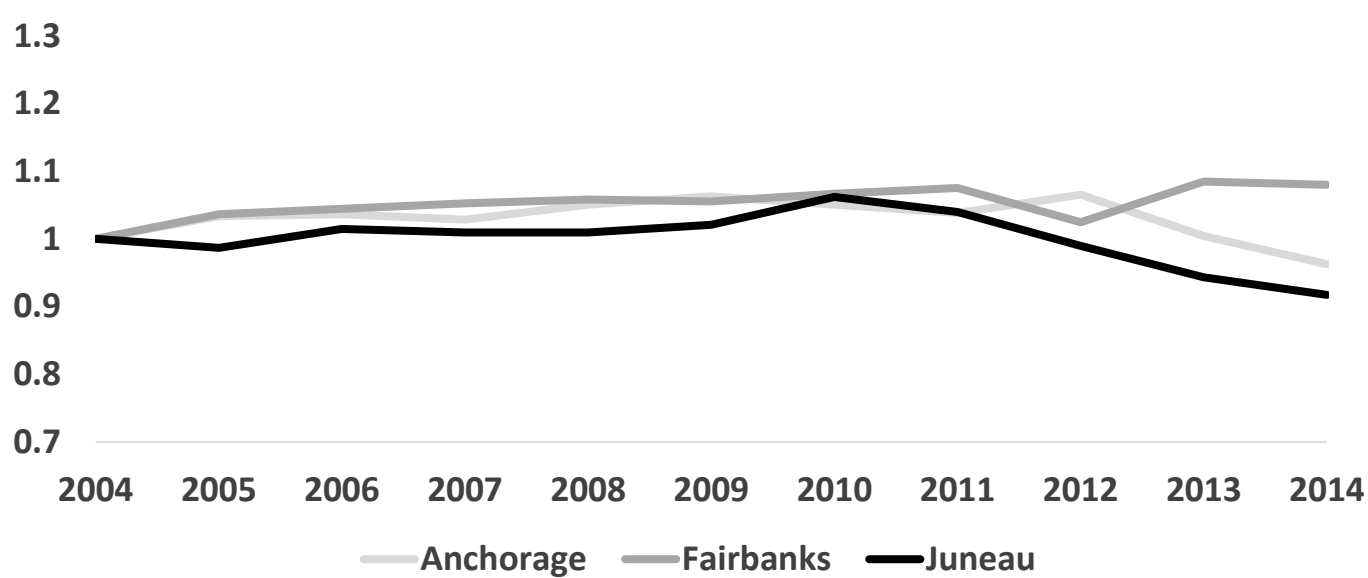
Figure 13: Average Annual Federal Government Civilian Employment in Juneau by Department, 2011 - 2014

	2011	2012	2013	2014	Change 2011-2014
Transportation	241	248	240	207	-14.1%
Commerce (NOAA)	233	228	201	192	-17.6%
Agriculture (USFS)	204	200	181	182	-10.8%
Postal Service	72	71	68	68	-5.6%
Interior	54	50	42	32	-40.7%
Defense	11	10	9	9	-18.2%
Social Security Admin	5	4	4	5	0.0%
All Other	19	19	17	13	-17.2%

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

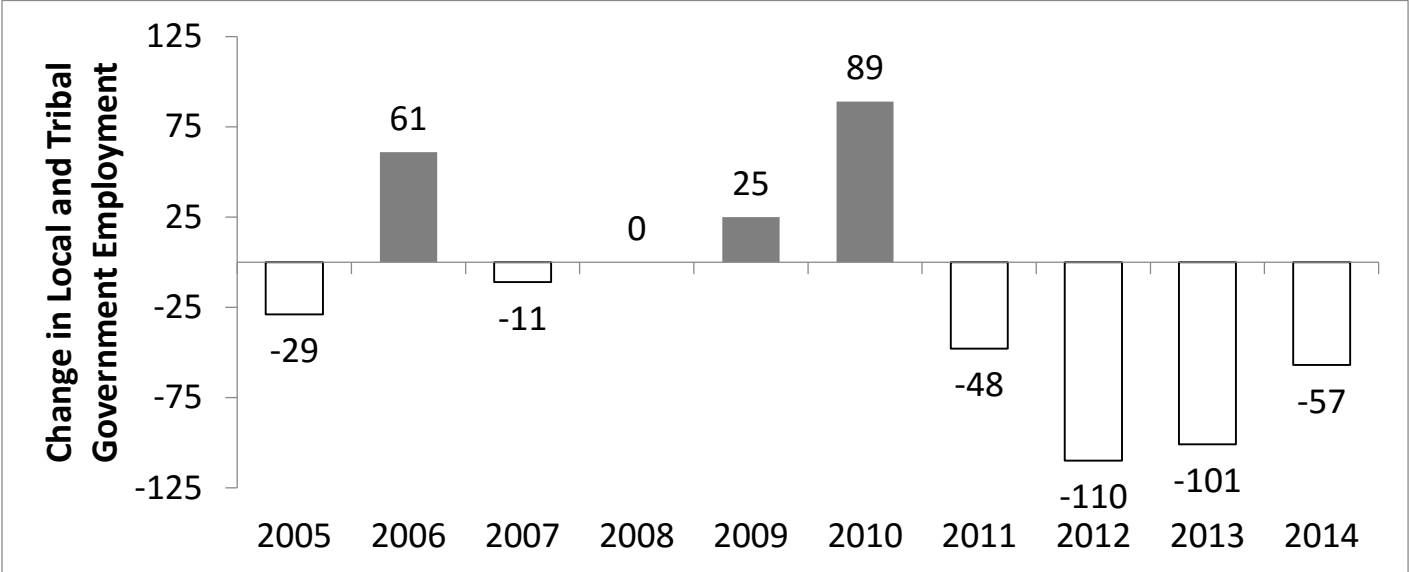
Local and Tribal Government Employment

Figure 14: Annual Change in Local and Tribal Government Employment in Juneau, Anchorage and Fairbanks 2004-2014, Indexed to 2004



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

Figure 15: Annual Change in Local and Tribal Government Employment in Juneau, 2005 - 2014

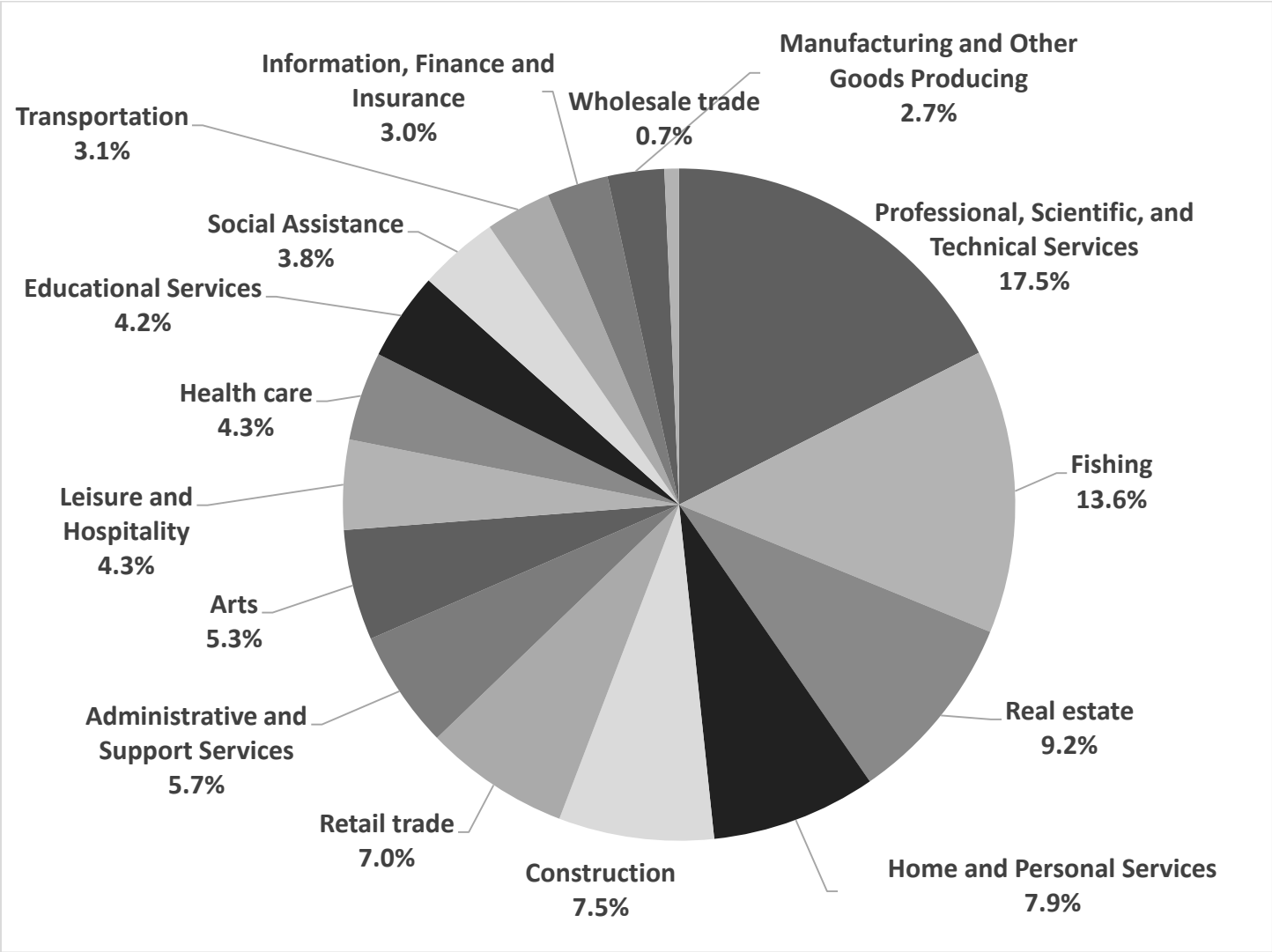


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages
Note: Local Government includes such enterprises as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital

Self-employed/Sole Proprietors

There were 2,572 businesses in Juneau with no employees in 2013, the most recent year for which data is available. This is traditionally considered an estimate of the number of self-employed/sole proprietors in Juneau. Professional, scientific and technical services remains the industry sector with the largest number of sole proprietors. Fishing is the second largest self-employed sector. Those self-employed in real estate sales, rental or leasing report the highest average gross revenues.

Figure 16: Distribution of Juneau’s Non-Employer Businesses (Self-Employed), 2013



Source: US Census Bureau, 2013 Non-employer Statistics

Figure 17: Juneau Non-Employer (Self-Employed) Statistics, 2013

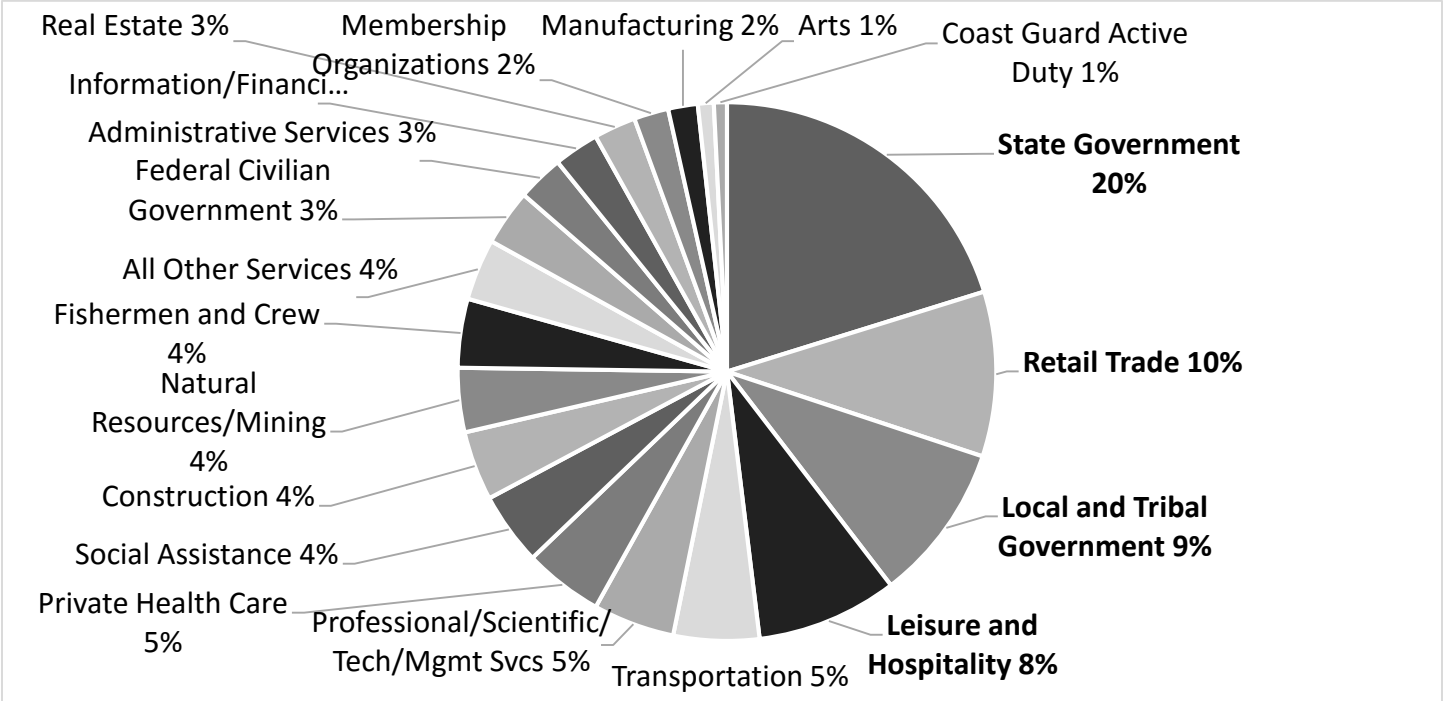
	Number of Non-Employer Establishments	Receipts	Average Gross Revenue
Professional, Scientific, and Technical Services	451	\$18,386,000	\$40,767
Fishing	351	\$19,597,000	\$55,832
Real estate	237	\$29,976,000	\$126,481
Home and Personal Services	204	\$6,458,000	\$31,657
Construction	192	\$14,320,000	\$74,583
Retail trade	180	\$6,068,000	\$33,711
Administrative and Support Services	146	\$4,294,000	\$29,411
Arts	137	\$1,567,000	\$11,438
Leisure and Hospitality	111	\$4,354,000	\$39,225
Health care	110	\$6,364,000	\$57,855
Educational services	109	\$1,719,000	\$15,771
Social Assistance	99	\$1,585,000	\$16,010
Transportation	81	\$5,352,000	\$66,074
Information, Finance and Insurance	76	\$3,754,000	\$49,395
Manufacturing and Other Goods Producing	70	\$1,766,000	\$25,229
Wholesale trade	18	\$1,703,000	\$94,611
Total for all sectors	2,572	\$127,263,000	\$49,480

Source: US Census Bureau, 2013 Non-employer Statistics

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

To get a complete picture of the diversity of Juneau’s workforce, the employed and self-employed job count has been combined in Figure 18. Juneau’s dependence on state government decreases from 24 percent to 20 percent of total employment when sectors such as the fishing industry, contributing four percent of jobs, and active duty Coast Guard, contributing one percent of jobs, are included. Four sectors now employ close to half (47 percent) of Juneau’s workforce: state government, local and tribal government, retail trade, and leisure and hospitality.

Figure 18: Where Juneau Works: Total Wage, Salary and Self-Employed Jobs

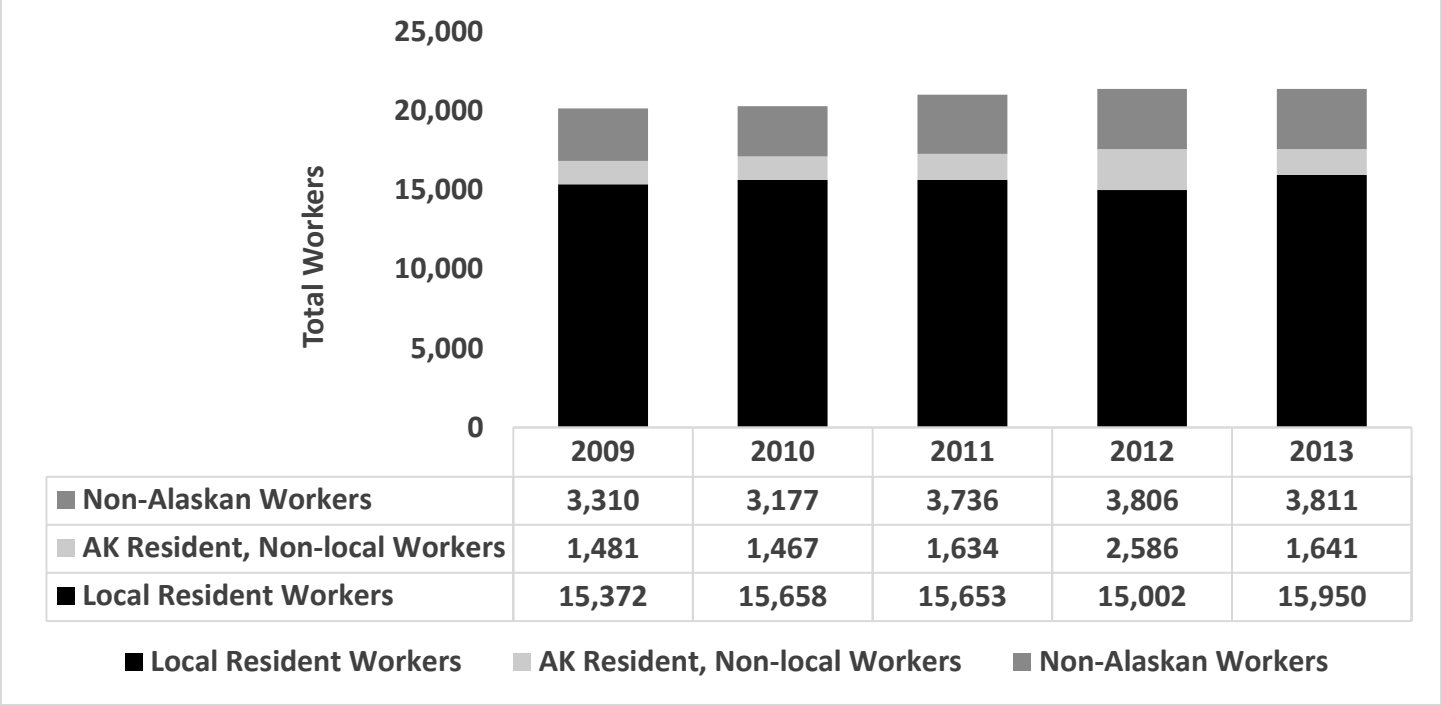


Source: Alaska Department of Labor and Workforce Development, 2014 Quarterly Census of Employment and Wages; US Census Bureau, 2013 Non-Employer Statistics, US Coast Guard FOIA.

Non-resident Employment

In 2013 (the most current year for which data is available), Juneau’s workforce was approximately 75 percent resident, 8 percent Alaskan but not local, and 18 percent out of state workers. These percentages have held fairly steady as the number of jobs in Juneau has increased, with the exception of 2012 when the number of Alaskan non-local resident workers was unusually high.

Figure 19: Non-Local Workers in Juneau, 2009 -2013



Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, "Residency of Alaska Workers 2013"

Figure 20: Resident and Non-Resident Workers and Earnings in Juneau, 2013

Workers					Per Capita Annual Earnings		
	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers	% Out of State	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers
State Government	4,038	289	237	5.2%	\$51,015	\$45,675	\$29,958
Local and Tribal Government	2,311	87	173	6.7%	\$45,132	\$32,184	\$25,434
Private Sector	9,601	1,265	3,401	23.8%	\$33,965	\$38,498	\$23,111
All Sectors	15,950	1,641	3,811	17.8%	\$39,900	\$39,427	\$23,642

Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, "Residency of Alaska Workers 2013"

Southeast Alaska Employment and Wages

Regional wage and salary employment stayed flat in 2014. The private sector added 78 jobs, mostly in tourism and administrative services, while the government sector lost 118 jobs. Total wages paid in the private sector increased by 2.5 percent, and total government wages increased by 1.2 percent.

Figure 21: Total Southeast Alaska Wage and Salary Employment and Earnings by Sector, 2013 and 2014

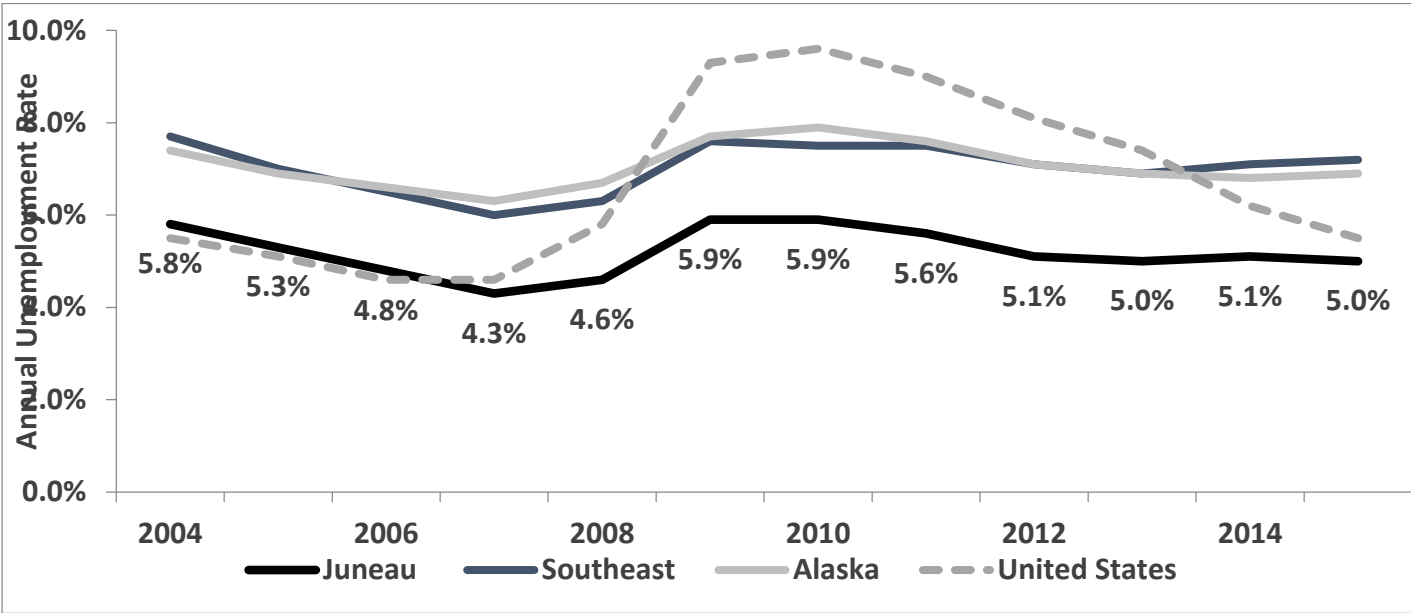
	Average Employment 2013	Average Employment 2014	% Change	Total Earnings 2013	Total Earnings 2014	% Change
Local and Tribal Government	6,007	5,988	-0.3%	\$273,410,597	281,839,970	3.1%
State Government	5,516	5,504	-0.2%	\$309,150,068	311,294,082	0.7%
Federal Civilian Government	1,567	1,480	-5.6%	\$122,404,128	120,063,983	-1.9%
Total Government	13,090	12,972	-0.9%	\$704,964,793	\$713,198,035	1.2%
Manufacturing	2,213	2,302	4.0%	\$87,781,445	\$89,384,76	1.8%
Construction	1,662	1,607	-3.3%	\$114,489,918	\$114,504,356	0.0%
Natural Resources and Mining	1,173	1,184	0.9%	\$100,074,331	\$100,498,958	0.4%
Total Goods Producing	5,048	5,092	0.9%	\$302,345,694	\$304,388,081	0.7%
Retail Trade	4,207	4,174	-0.8%	\$116,296,869	\$117,262,850	0.8%
Leisure and Hospitality	3,817	3,929	2.9%	\$76,945,699	\$81,531,873	6.0%
Transportation	2,316	2,394	3.4%	\$95,438,255	\$103,190,794	8.1%
Private Health Care	2,346	2,258	-3.8%	\$114,421,038	\$113,311,816	-1.0%
Social Services	1,495	1,459	-2.4%	\$44,506,336	\$45,775,589	2.9%
Financial Services	1,197	1,160	-3.2%	\$53,402,060	\$51,297,629	-3.9%
Membership Organizations	908	882	-2.9%	\$25,002,635	\$24,488,994	-2.1%
Mgmt, Professional, Scientific, and Tech	848	876	3.3%	\$49,900,531	\$59,472,268	19.2%
Administrative Services	636	686	7.9%	\$21,664,942	\$23,858,792	10.1%
All Other Services	657	659	0.3%	\$23,805,411	\$24,062,246	1.1%
Information	481	481	0.0%	\$19,568,935	\$20,179,224	3.1%
Wholesale Trade	394	379	-3.8%	\$16,763,598	\$15,485,730	-7.6%
Total Service Providing	19,303	19,337	0.2%	\$657,716,310	\$679,917,805	3.4%
Total Private Sector	24,351	24,429	0.3%	\$960,062,005	\$984,305,886	2.5%
Total	37,441	37,401	-0.1	\$1,665,026,798	\$1,697,503,921	2.0%

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

Unemployment

The unemployment rate in Juneau has been consistently lower than the rest of the region, state, and country since 2008. As of July 2015, the unemployment rate in Juneau was 5.0 percent, compared to the U.S. average of 5.5 percent. The region at 7.2 percent and the state at 6.9 percent are currently above the national rate.

Figure 22: Annual Unemployment Rate Trend 2005-2015 (Not Seasonally Adjusted)

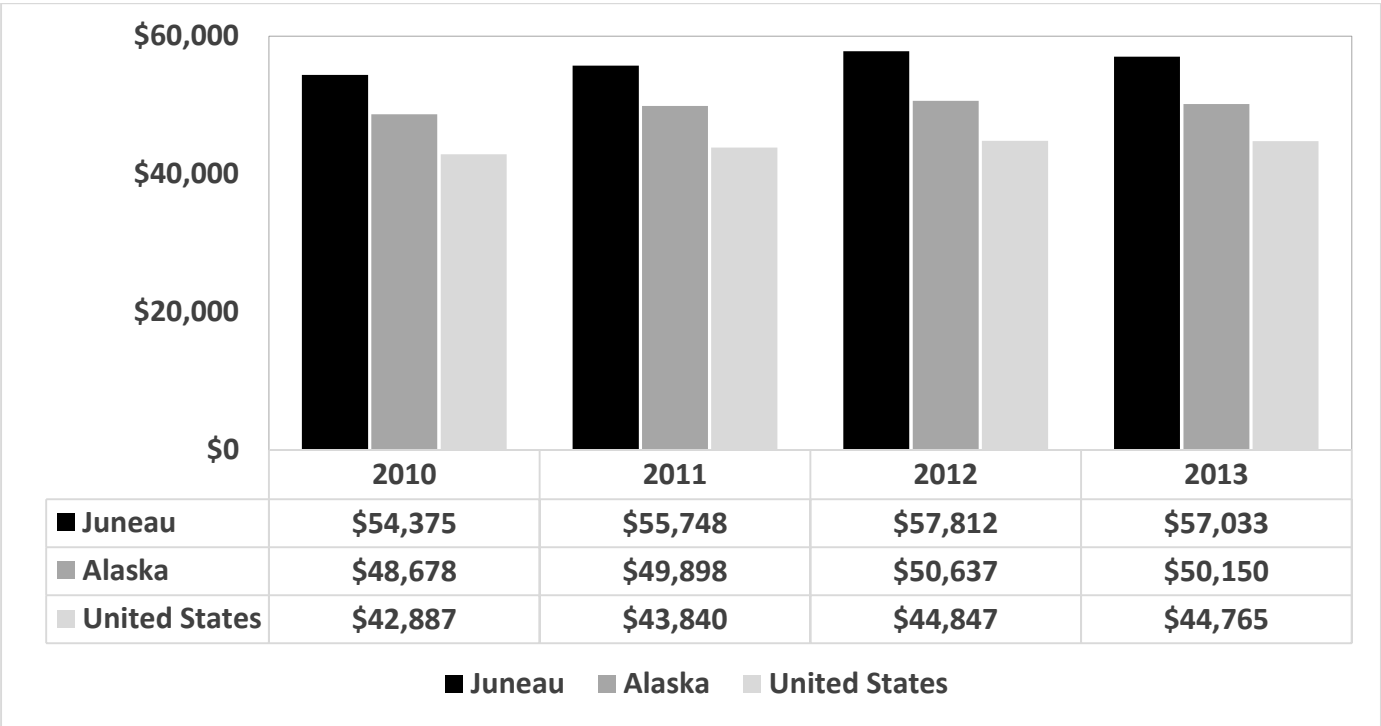


Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Employment and Employer Data

Per Capita Personal Income

Per capita personal income is calculated as the total personal income of residents divided by the population. It is an indicator of the economic well-being of the residents. Juneau continues to have a higher per capita income than the state and the national average. In Juneau, more than two-thirds (67 percent) of total personal income is income from employment. Investment income, which includes dividends, rental income and interest, contributes 22 percent, and government transfers, which include the permanent fund dividend, Medicare, Medicaid and social security, contributes the remaining 11 percent of total personal income. While income from employment is 67 percent of state personal income, dividends, interest and rent contribute a lower 18 percent and transfer payments contribute a higher 14 percent. Again, 2013 is the latest year for which data is available.

Figure 23: Per Capita Personal Income Comparison, 2010-2013 (In 2013 Inflation-adjusted Dollars)



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

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

Figure 24: Per Capita Personal Income for Selected Boroughs, Alaska and U.S., 2010 - 2013 (In Nominal Dollars)

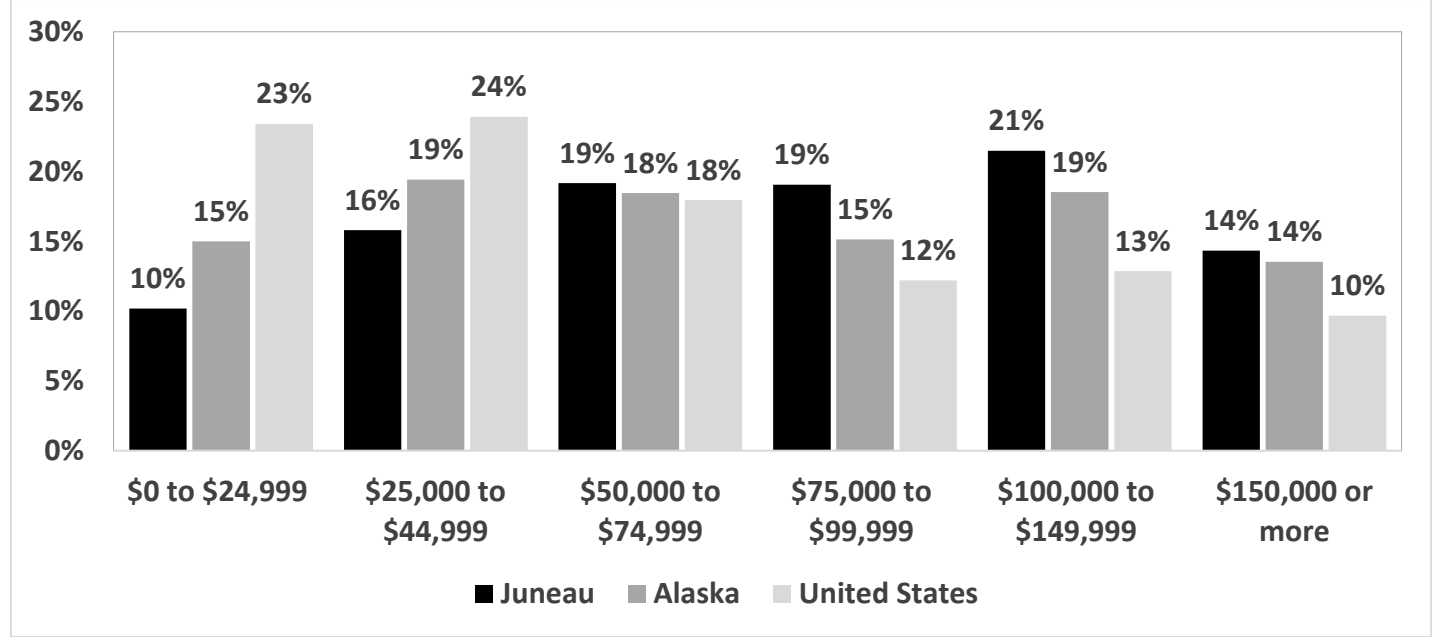
Area	2010	2011	2012	2013	% Change 2012-2013
Haines Borough, AK	\$68,553	\$78,768	\$81,477	\$85,326	4.7%
Skagway Municipality, AK	\$57,841	\$65,121	\$65,404	\$70,065	7.1%
Juneau City and Borough, AK	\$50,897	\$53,830	\$56,978	\$57,033	0.1%
Ketchikan Gateway Borough, AK	\$52,272	\$54,824	\$56,045	\$56,591	1.0%
Sitka City and Borough, AK	\$44,932	\$49,466	\$50,737	\$52,608	3.7%
Petersburg Census Area, AK	\$47,702	\$48,007	\$52,272	\$51,541	-1.4%
Alaska	\$45,564	\$48,181	\$49,906	\$50,150	0.5%
Yakutat City and Borough, AK	\$40,770	\$46,834	\$46,863	\$49,269	5.1%
United States	\$40,144	\$42,332	\$44,200	\$44,765	1.3%
Hoonah-Angoon Census Area, AK	\$36,394	\$41,632	\$44,309	\$44,619	0.7%
Wrangell City and Borough, AK	\$35,917	\$39,160	\$40,512	\$40,890	0.9%
Prince of Wales-Hyder Census Area, AK	\$32,132	\$32,952	\$34,247	\$36,354	6.2%

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

Income Inequality

In the United States, 47 percent of all households earn less than \$50,000, compared to 34 percent in Alaska and 26 percent in Juneau. In contrast, 54 percent of Juneau households earn more than \$75,000 per year, while only 35 percent of U.S. households are above this threshold.

Figure 25: Percent of Households by Income Bracket, 2009-2013, 5-Year Average



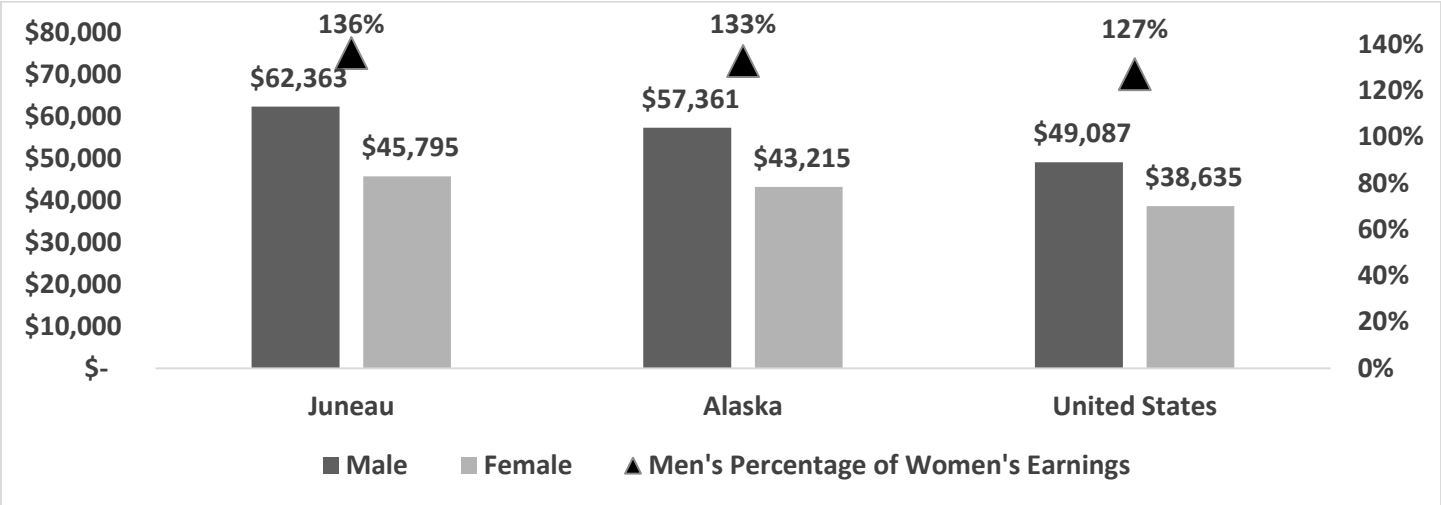
Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates DP03 Dataset, 2013 Inflation Adjusted Dollars

Gender Compensation

Women working in Juneau, on average, earn more than their counterparts in Alaska and the U.S. However, the five year average (2009-2013) wage for Juneau men of \$62,363, exceeds the average of \$45,795 for women by 36 percent, while nationally men out-earned women by a smaller 27 percent on average. A large factor in the inequality seen in both national and Juneau’s statistics is due to the difference in

the type of jobs that women hold compared to men, rather than to pay inequality for equal work. For example, in 2014, close to 77 percent of bookkeeping, accounting, auditing and office clerks, and office and administrative support workers in Juneau were women, while over 90 percent of higher paid carpenters, extraction workers, operating engineers, construction equipment operators and construction laborers were men, and over 80 percent of highly paid computer programmers were men.

Figure 26: Median Earnings by Gender for Full-Time, Year-Round Workers, Juneau 2009-2013, 5-Year Average



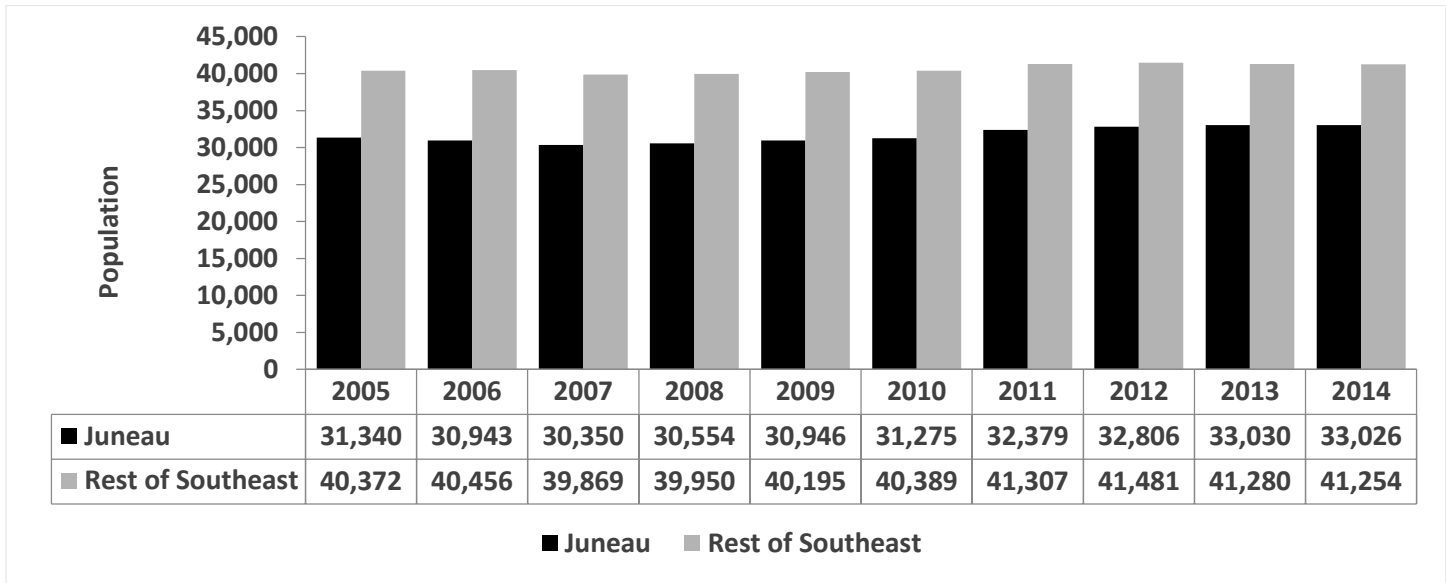
Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates DP03 Dataset, 2013 Inflation Adjusted Dollars

Demographics

Juneau Population Trends

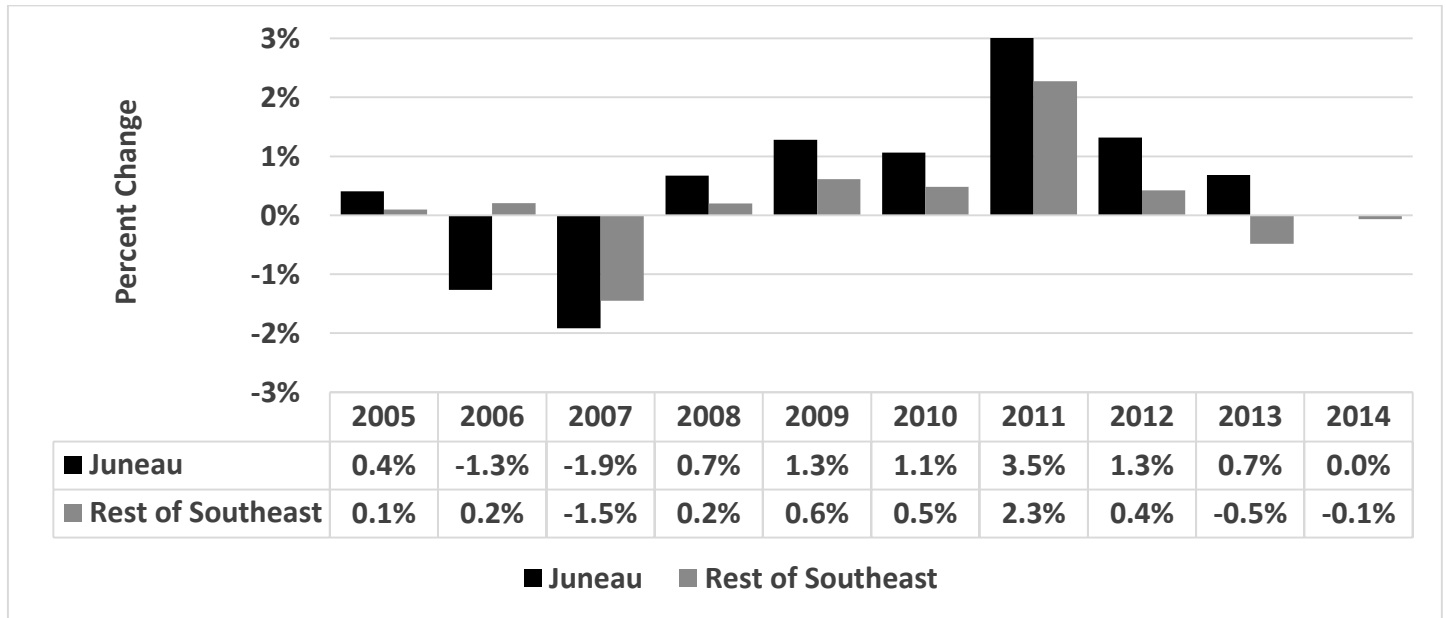
After six consecutive years of continuous population growth, Juneau’s population leveled off in 2014. Juneau’s annual population change comes from a net natural increase (births minus deaths) and from net migration into or out of the community. While in 2010 through 2012 Juneau welcomed a net inflow of new residents, 2013 saw equal numbers arrive as leave. Population increase was a result of natural growth only. In 2014 Juneau had a net outflow of 227 residents which, combined with the natural increase of 223 individuals, left Juneau with almost no change in population. Over the past ten years, from 2005 to 2014, Juneau’s compound annual growth rate was 0.5 percent, the Southeast region exclusive of Juneau grew at 0.2 percent, and the State of Alaska enjoyed a 1 percent compound annual growth rate in population.

Figure 27: Juneau and Southeast Alaska Population, 2005 – 2014



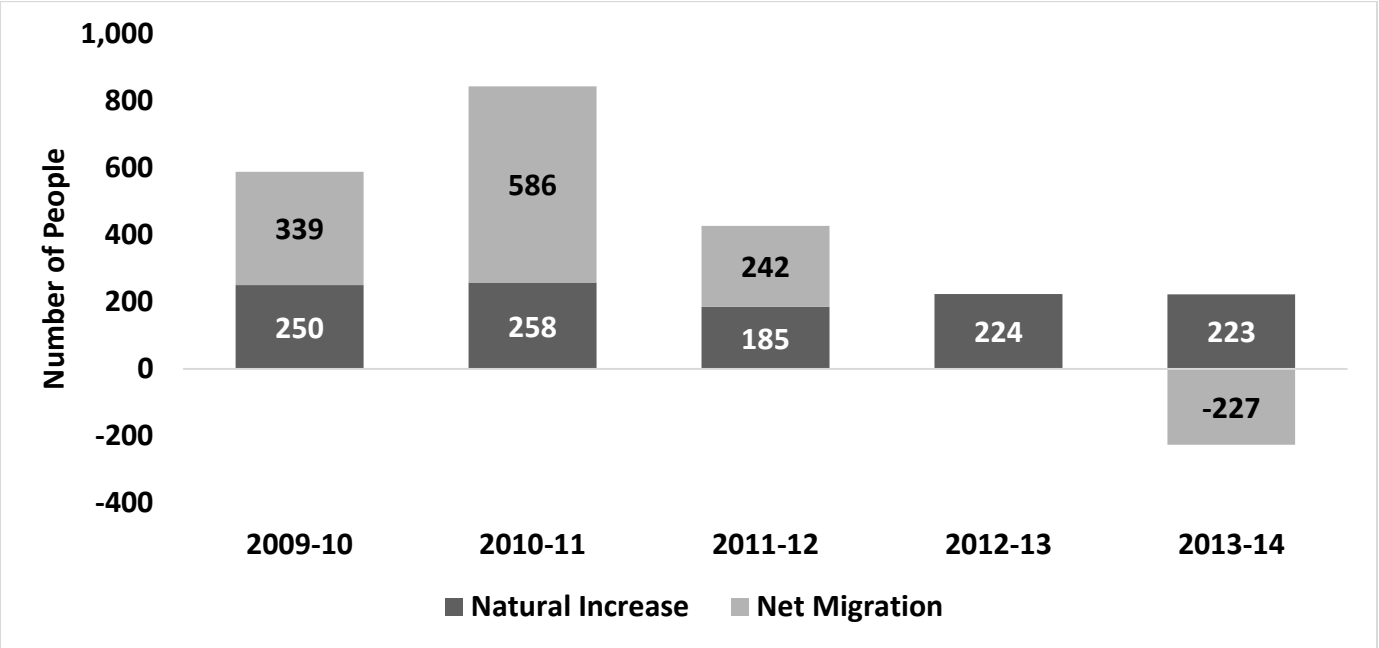
Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates

Figure 28: Juneau and Southeast Alaska Yearly Percent Population Change, 2005 – 2014



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

Figure 29: Annual Components of Population Change, Juneau 2009 – 2014

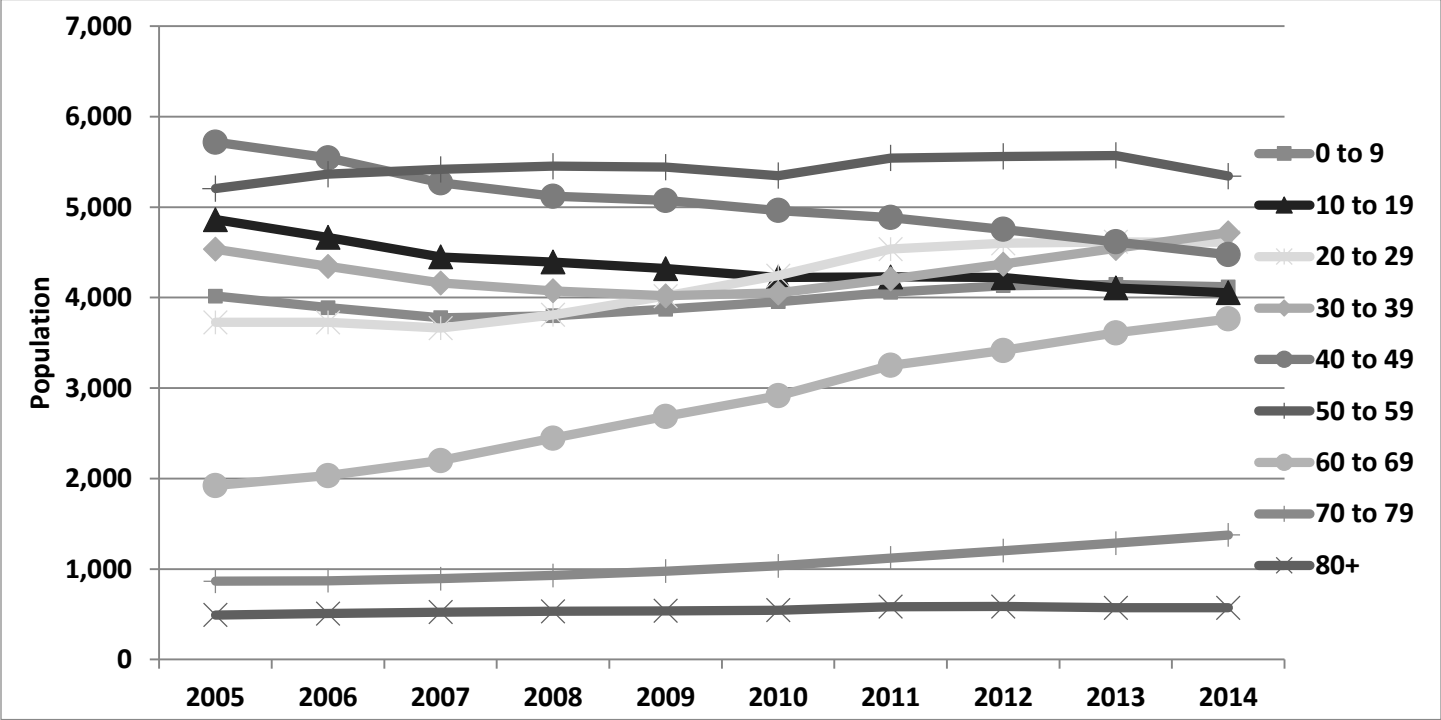


Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates, Components of Change, 2010 to 2014

Juneau Population by Age Group

From 2013 to 2014, the number of Juneau’s residents age 60 and over increased by 4.5 percent, and the 30 to 39 year-old demographic increased by 3.8 percent. However, the 40 to 59 demographics decreased by 3.6 percent along with a decrease in school age children of about 1 percent.

Figure 30: Juneau Population by Age Group, 2005 – 2014



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 232 people. As in previous years, the majority of people who moved to or from Juneau came from or went to locations outside of Alaska. Within Alaska, Juneau again saw a net population loss to the Anchorage and Matanuska-Susitna region and a net gain from other Southeast communities. The largest numbers came from the Hoonah-Angoon census area and Sitka.

Figure 31: PFD-based Migration To and From Juneau, 2013 to 2014

Region	Into Juneau	Out of Juneau	Net Migration
Southwestern Region	11	25	-14
Northern Region Alaska	12	9	3
Gulf Coast Region	40	37	3
Interior Region	59	67	-8
Anchorage/Mat-Su Region	225	333	-108
Southeast Region	308	178	130
Haines Borough	21	20	1
Hoonah-Angoon Census Area	73	39	34
Ketchikan Gateway Borough	53	36	17
Petersburg Census Area	18	11	7
Prince of Wales-Hyder Census Area	42	21	21
Sitka City and Borough	74	41	33
Skagway Municipality	4	4	0
Wrangell City and Borough	12	5	7
Yakutat City and Borough	11	1	10
Did not apply for PFD	1,940	2,178	-238
Total Migration	2,595	2,827	-232

Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Migration Data and Information, PFD-Based Migration, 2000-2014

Regional Population Trends

Figure 32: Southeast Population by Borough and Census Designated Place (CDP) 2011-2014

	July 2011	July 2012	July 2013	July 2014	% Change 2013-2014
Haines Borough	2,614	2,614	2,527	2,537	0.4%
Covenant Life CDP	85	83	65	71	-21.7%
Excursion Inlet CDP	15	12	8	9	-33.3%
Haines CDP	1,804	1,827	1,807	1,805	-1.1%
Lutak CDP	50	56	67	78	19.6%
Mosquito Lake CDP	311	291	265	262	-8.9%
Mud Bay CDP	208	210	198	183	-5.7%
Balance	141	135	117	129	-13.3%
Hoonah-Angoon Census Area	2,155	2,205	2,179	2,128	-2.3%
Angoon City	474	455	438	416	-5.0%
Elfin Cove CDP	17	20	16	16	0.0%
Game Creek CDP	14	19	27	18	-33.3%
Gustavus City	456	488	501	516	3.0%

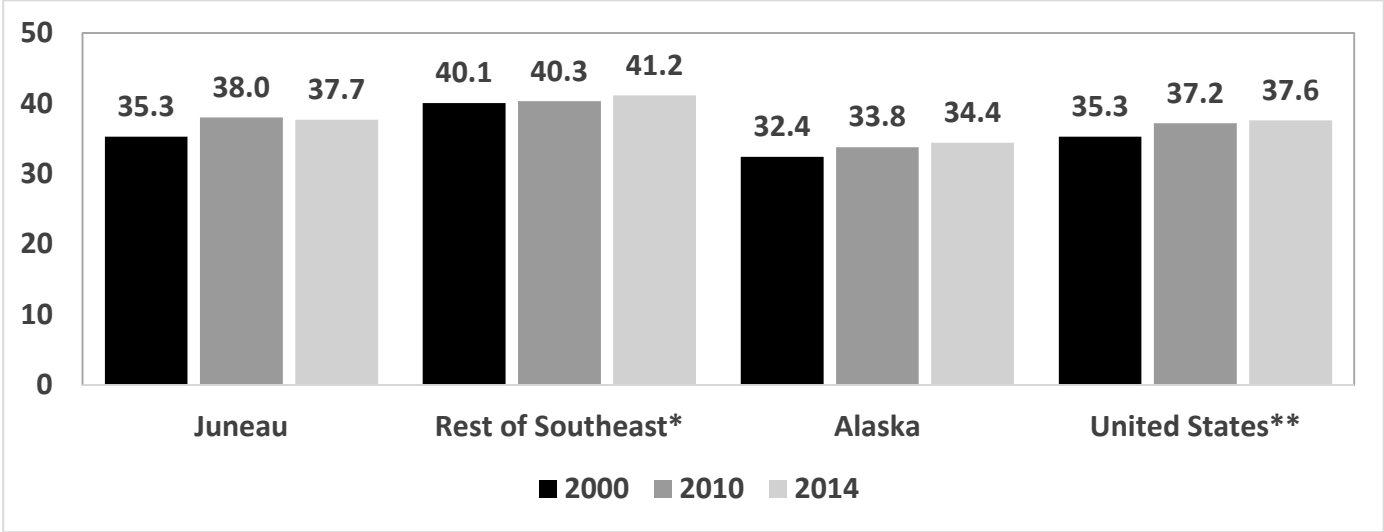
	July 2011	July 2012	July 2013	July 2014	% Change 2013-2014
Hoonah City	761	775	797	787	-1.3%
Klukwan CDP	96	92	93	84	-9.7%
Pelican City	83	82	79	75	-5.1%
Tenakee Springs City	144	151	140	128	-8.6%
Balance	110	123	88	88	0.0%
Juneau City and Borough	32,379	32,806	33,030	33,026	0.0%
Ketchikan Gateway Borough	13,741	13,890	13,828	13,825	0.0%
Ketchikan City	8,194	8,265	8,291	8,314	0.3%
Saxman City	436	432	411	419	1.9%
Balance	5,111	5,193	5,126	5,092	-0.7%
Petersburg Census Area	3,295	3,261	3,213	3,209	-0.1%
Kupreanof City	27	33	25	25	0.0%
Petersburg City	3,020	2,965	2,954	2,964	0.3%
Balance	248	263	234	220	-6.0%
Prince of Wales-Hyder Census Area	6,457	6,431	6,443	6,426	-0.3%
Coffman Cove City	175	180	162	174	7.4%
Craig City	1,250	1,241	1,194	1,198	0.3%
Edna Bay CDP	50	39	49	46	-6.1%
Hollis CDP	110	109	120	94	-21.7%
Hydaburg City	408	366	405	405	0.0%
Hyder CDP	95	97	94	91	-3.2%
Kake City	577	597	621	626	0.8%
Kasaan City	80	80	75	75	0.0%
Klawock City	808	798	785	802	2.2%
Metlakatla CDP	1,420	1,460	1,470	1,480	0.7%
Naukatik Bay CDP	121	113	123	121	-1.6%
Point Baker CDP	14	16	15	13	-13.3%
Port Alexander City	58	61	56	45	-19.6%
Port Protection CDP	52	42	57	56	-1.8%
Thorne Bay City	492	508	518	530	2.3%
Whale Pass CDP	32	39	39	39	0.0%
Balance	715	685	660	631	-4.4%
Sitka City and Borough	9,022	9,055	9,034	9,061	0.3%
Skagway Municipality	965	959	981	1,031	5.1%
Skagway CDP	915	909	926	967	4.4%
Balance	50	50	55	64	16.4%
Wrangell City and Borough	2,412	2,445	2,453	2,453	-1.9%
Yakutat City and Borough	646	621	622	622	1.4%
Southeast Total	73,686	74,287	74,310	74,280	0.0%

Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Alaska Population Estimates by Borough, Census Area, City, and Census Designated Place (CDP), 2010 to 2014

Median Age

Juneau’s median age has been stable at around 38 for a number of years. Juneau’s population is older than the state average, but close to that of the nation. The Southeast region exclusive of Juneau is significantly older than Juneau, Alaska and the nation.

Figure 33: Median Age, 2000, 2010, and 2014



Source: U.S. Census Bureau, 2000 and 2010 Census 100% Dataset; Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2014" Dataset

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

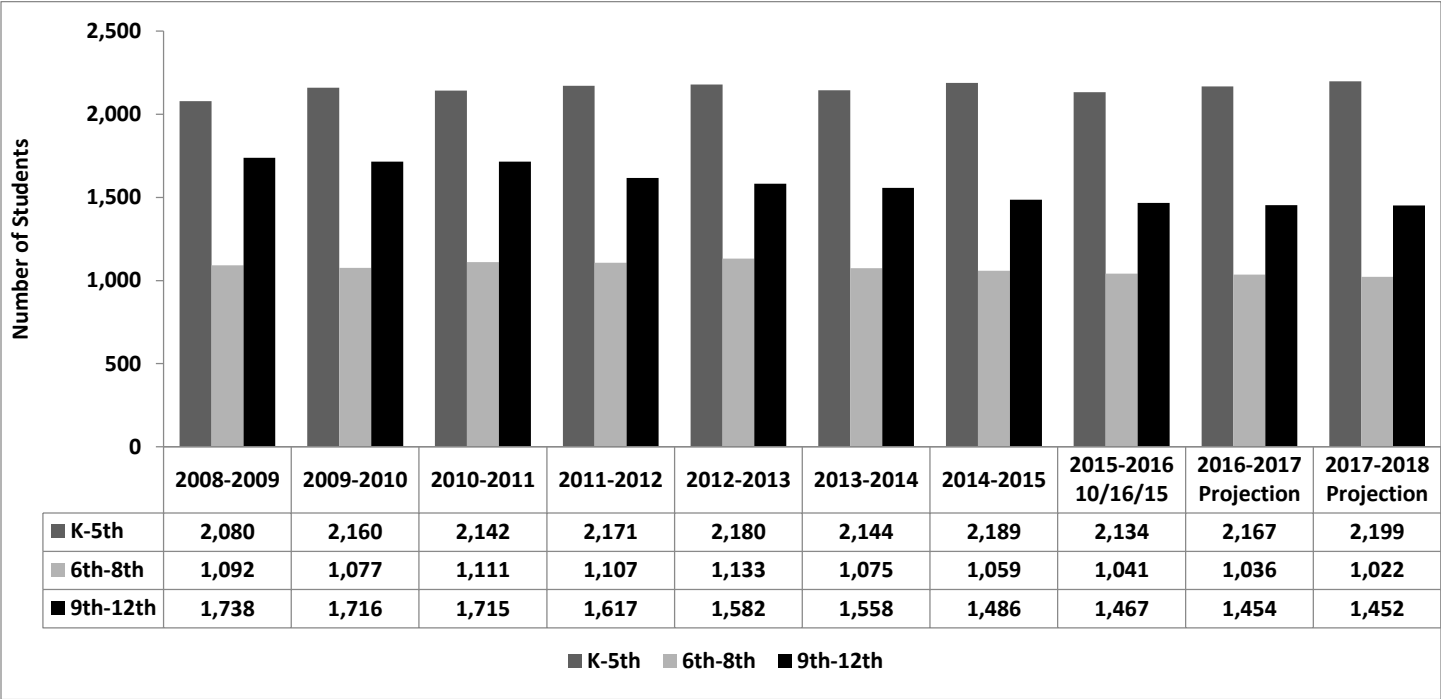
**US median age calculated by the US Census Bureau as of July 1, 2014

Education

Juneau School District Enrollment

In the October count for the 2015-2016 school year, 4,642 students were enrolled in the Juneau School District in grades K-12. The official count for the 2014-2015 school year was 4,734 students, indicating close to a 2 percent drop in enrollment from the previous year. The Juneau School District has seen a decline in student population for the ten year period from FY2006 to FY2015 of about 1 percent on an annual compound basis. Erickson & Associates, economic consultants for the Juneau School District, forecast an increase in elementary school students, and a continued drop in middle school and high school enrollment through FY2018.¹

Figure 34: Juneau School District K-12 Enrollment by Grade, 2009 - 2016, and Projections for 2017 - 2018



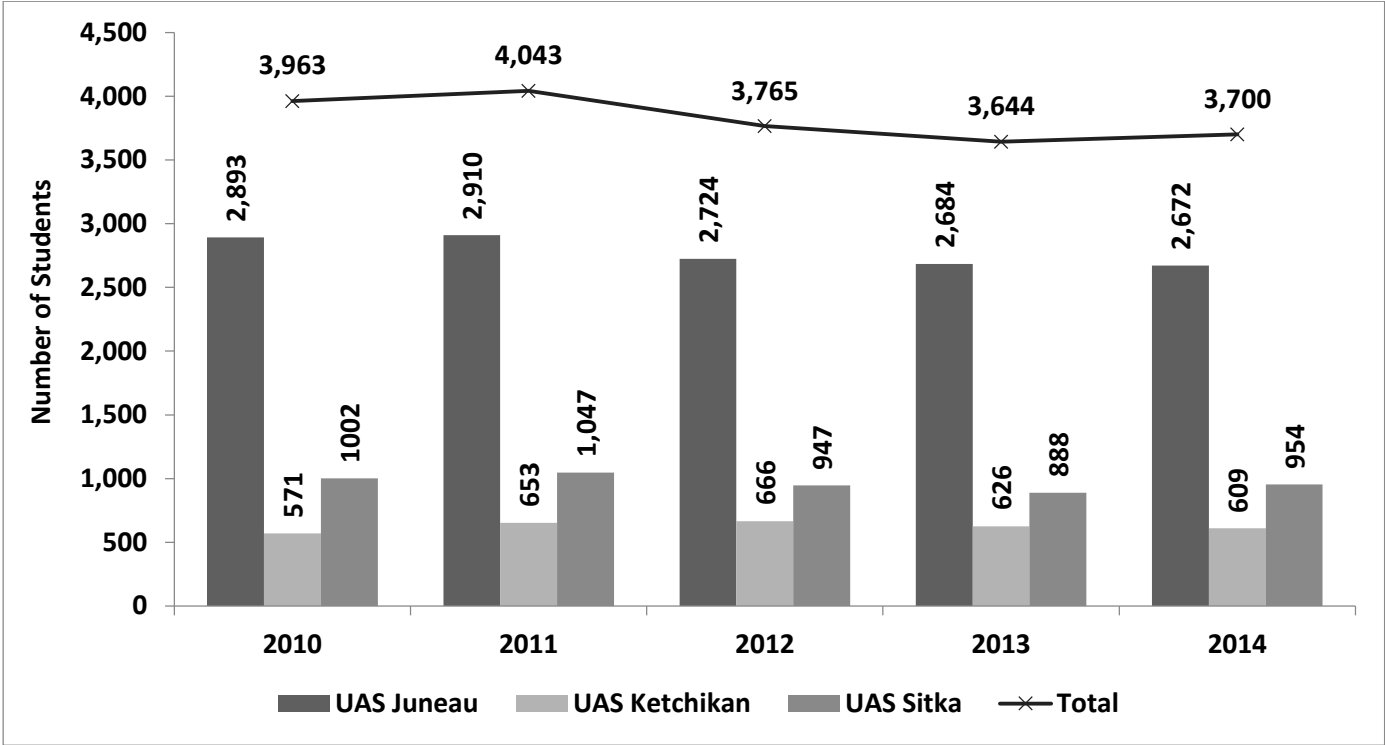
Source: Alaska Department of Education and Early Development, Statistics and Reports, District Enrollment Totals for All Alaskan School Districts; FY16 School District Enrollment as of 10/16/15 obtained through Juneau School District; FY 17-18 enrollment projections by Erickson & Associates LLC represent the midpoint in a range of possible enrollment outcomes.

University of Alaska Southeast Enrollment

Fall of 2014 saw an increase in enrollment at the Sitka campus and a slight decrease in Juneau and Ketchikan. According to the National Center for Education Statistics, the University of Alaska Southeast, with 3,700 students, has approximately 28 percent of students enrolled full-time and 72 percent enrolled part-time. Sixty-five percent of students are female, and over half of all students (56 percent) are over age 25.

¹ These estimates represent the midpoint in a range of possible enrollment outcomes.

Figure 35: University of Alaska Southeast Fall Enrollment, 2010 to 2014

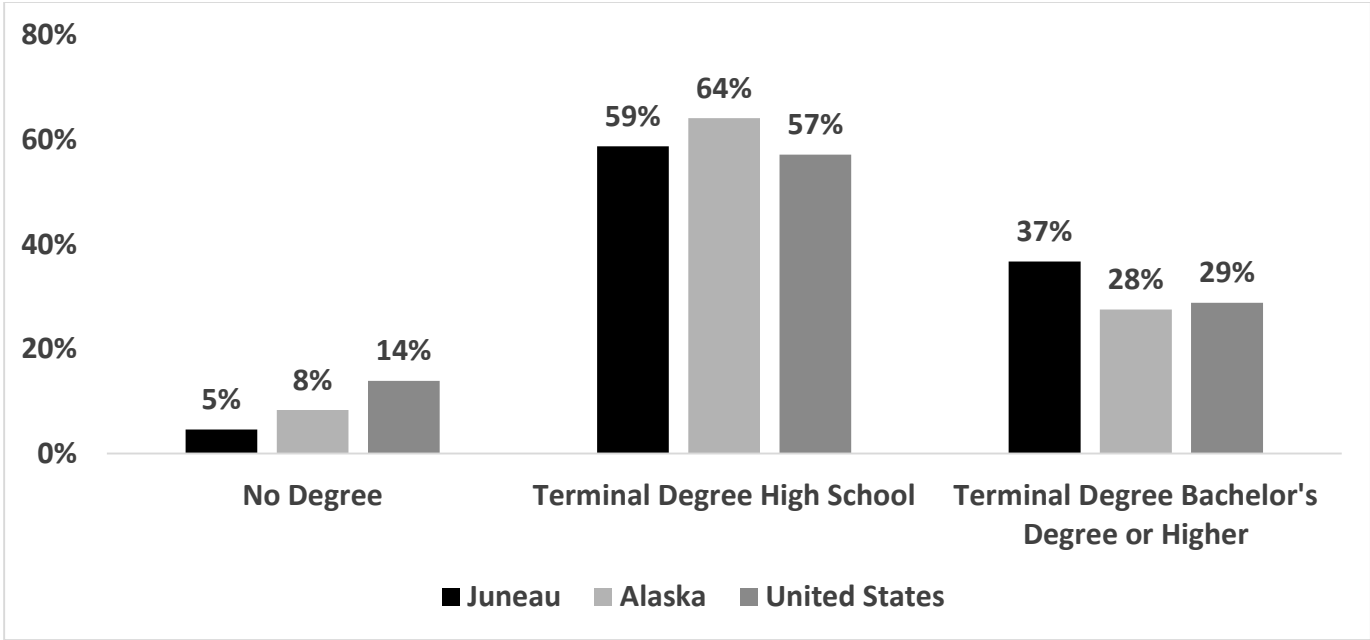


Source: University of Alaska Fact Book; Note: Due to cross-registration, individual campus enrollments do not sum to total enrollment.

Educational Attainment

Juneau residents have a higher level of educational attainment then overall state and national population. Only 5 percent of the community is without a high school diploma compared to a state average of 8 percent and a national average of 14 percent. Thirty-seven percent of residents have a bachelor’s degree or higher compared to the national average of 29 percent.

Figure 36: Terminal Degree by Percent of Population 25 Years and Older, 2009-2013, 5-Year Average



Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates, “Selected Social Characteristics in the United States” DP02 Dataset

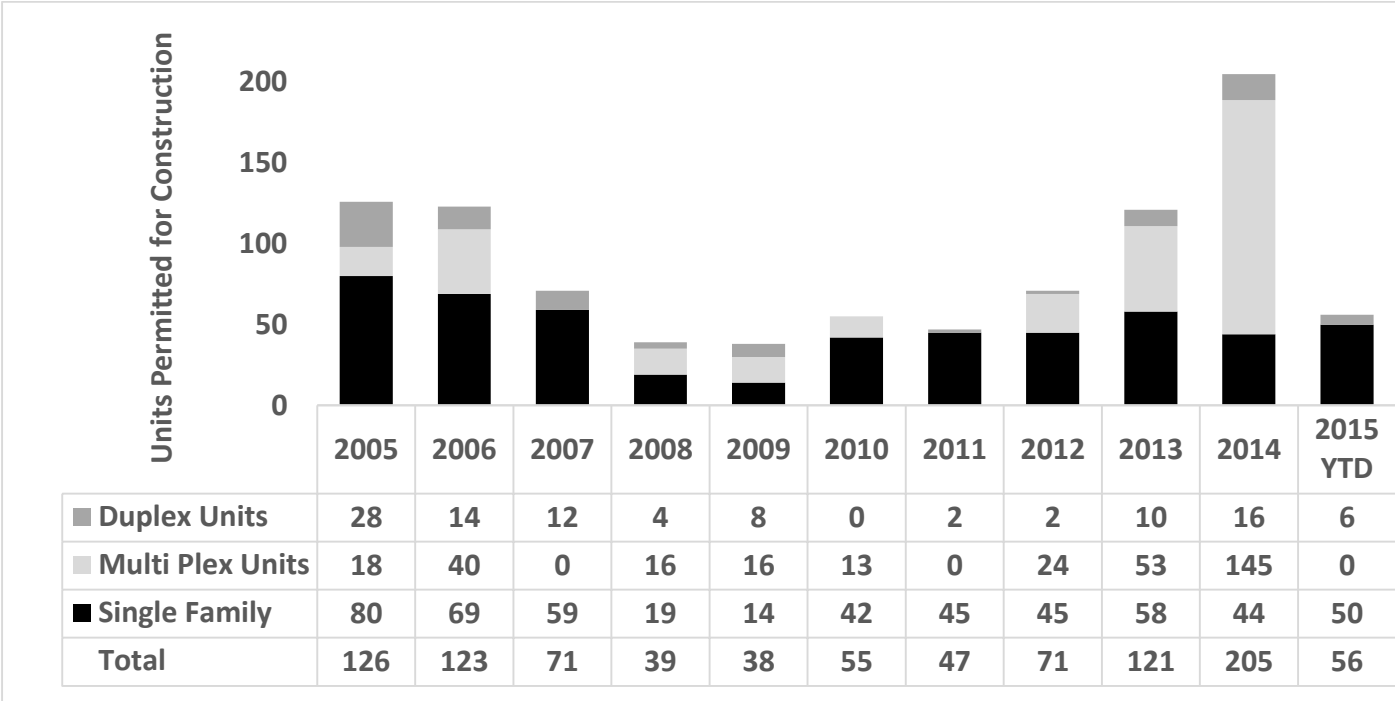
Construction and Housing

New Construction

Juneau Home Construction

2014 saw a dramatic increase in the number of multiplex units permitted to be built in Juneau. A total of 145 construction permits were issued, surpassing 2013 by 92 units. Through September 2015, 56 residential permits have been issued, more in line with the past average for Juneau, rather than the prior two year boom.

Figure 37: New Units Permitted to be Built in Juneau 2005 to 2015 (YTD September)



Source: City & Borough of Juneau Permit Center reports. Note: Single Family includes attached units; multi-family includes properties with two or more dwellings.

Southeast Alaska New Home Construction

Figure 38: New Housing Units by Type of Structure, Select Communities 2013 - 2014

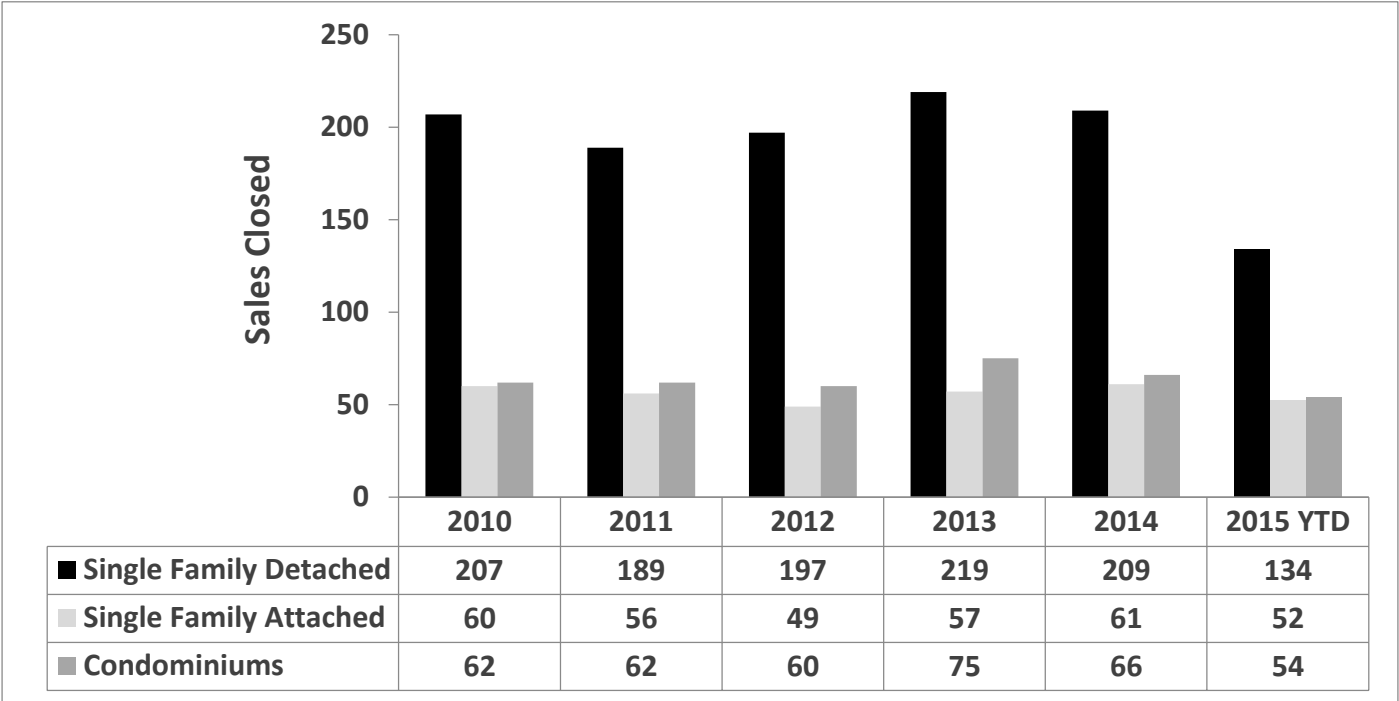
	Total Units 2014	Total Units 2013	Single Family 2014	Single Family 2013	Multi Family 2014	Multi Family 2013
Craig	4	5	2	5	2	0
Haines	9	23	9	12	0	11
Hoonah	4	2	4	2	0	0
Juneau	220	132	51	61	168	65
Ketchikan Gateway Borough	36	41	27	23	9	18
Klawock	2	4	1	4	0	0
Petersburg	10	4	8	4	2	0
Sitka Borough	21	24	17	9	0	12
Skagway	4	16	4	3	0	12
Wrangell Borough	6	3	6	2	0	0

Source: 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

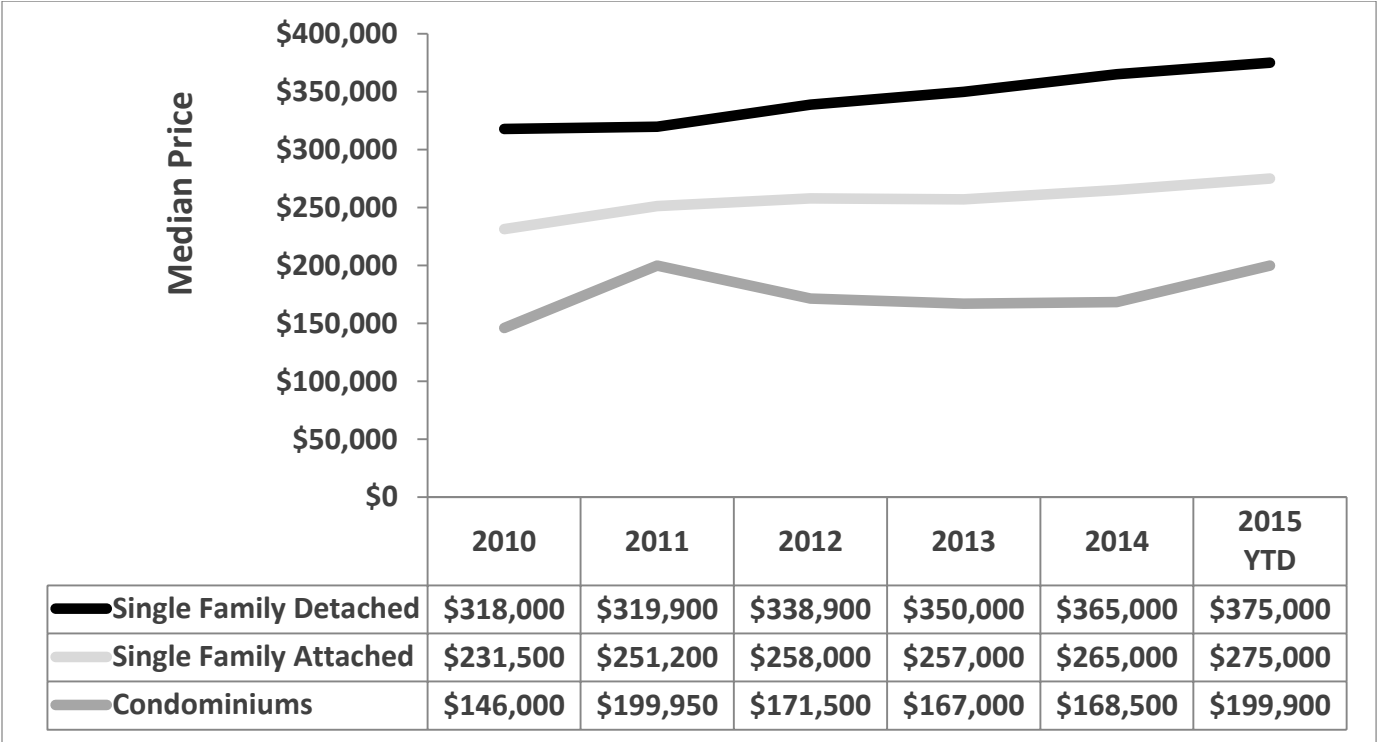
In 2014, home sales in Juneau were down overall by 4.3 percent from 2013. Sales volume year to date in 2015 indicates that sales will be down again. Prices have continued to increase, with single family homes gaining 4.3 percent in 2014 and rising again to date in 2015. The rapid turnover for single family homes and condominiums, less than 30 days, is an indication of the tight housing market in Juneau. In 2014, the median number of days on market was an average of 23 days for all housing types and continued to fall this year to date in 2015, to about 18 days.

Figure 39: Juneau Single-Family Home and Condominium Sales, 2010 – 2015 (YTD August)



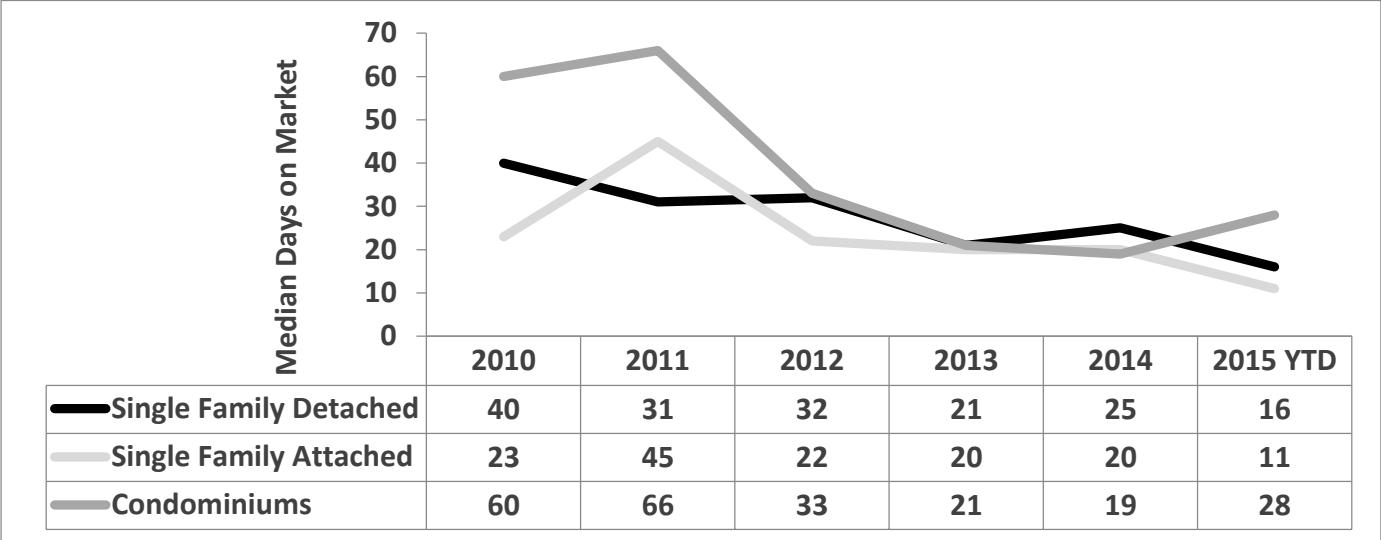
Source: Southeast Alaska Multiple Listing Service.

Figure 40: Median Price of Single Family Homes and Condominiums in Juneau, 2010-2015 (YTD August)



Source: Southeast Alaska Multiple Listing Service.

Figure 41: Median Days on Market, 2010 – 2015 (YTD August)



Source: Southeast Alaska Multiple Listing Service.

Monthly Rental Costs (Market Rates) and Vacancy Rates

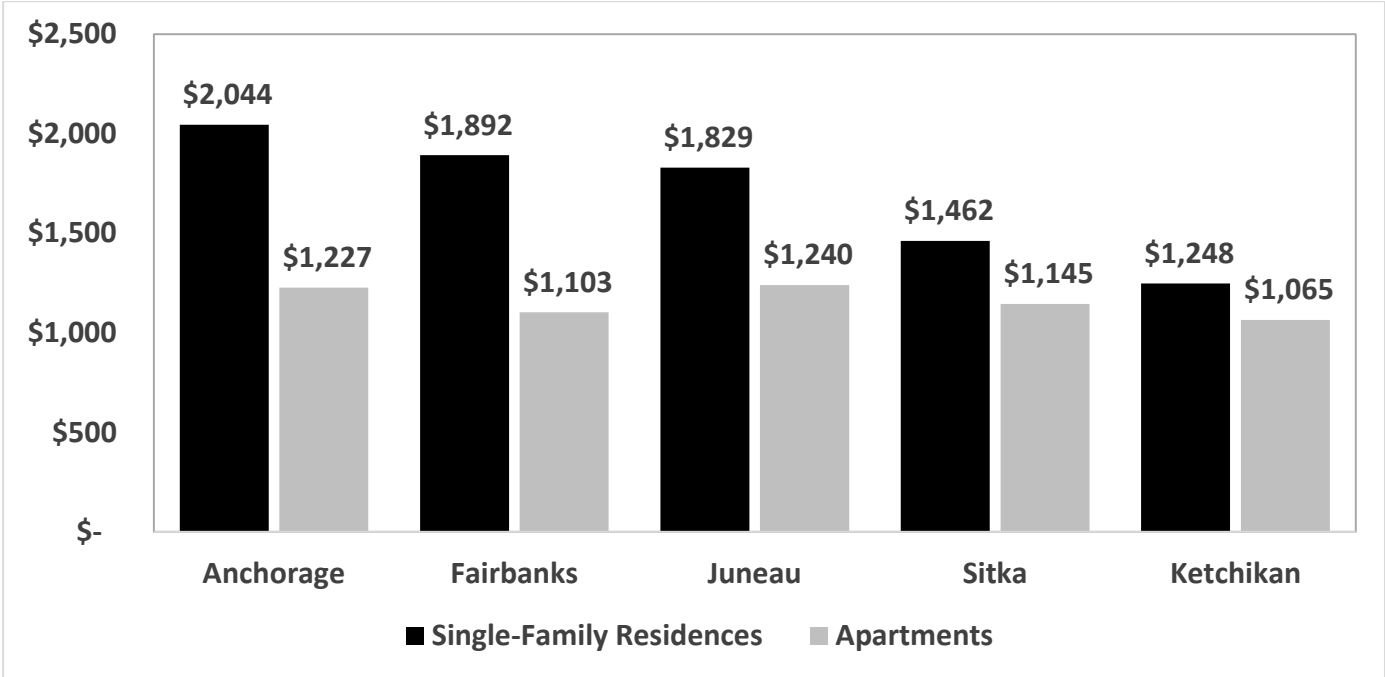
Every March, the Alaska Department of Labor and Workforce Development surveys Alaska’s landlords for residential rental unit information for the Alaska Housing Finance Corporation. In 2015, the average rental price for a single family residence in Juneau was \$1,829, up 2.8 percent from 2014, and average rental price for an apartment was \$1,240, up 3.7 percent on an adjusted basis. 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. While the average apartment rental in Juneau is more expensive than a unit in Ketchikan, Sitka, Anchorage, or Fairbanks, a single family residence is less expensive than Anchorage or Fairbanks.

Figure 42: Average Adjusted Juneau Rental Prices 2010-2015



Source: Alaska Housing Finance Corporation, Annual Rental Market Survey (March)

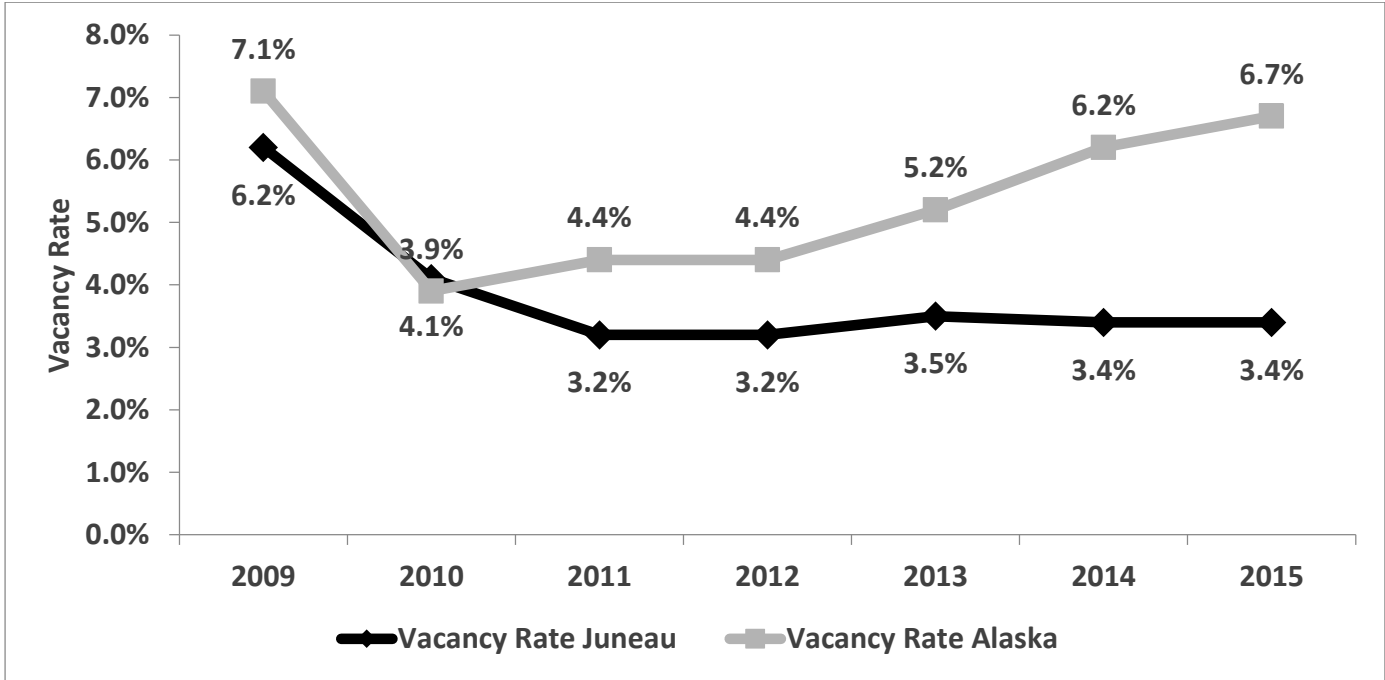
Figure 43: All Units Average Adjusted Rent, Select Communities, 2015



Source: Alaska Housing Finance Corporation, Annual Rental Market Survey (March)

Vacancy rates remained at a low 3.4 percent, almost half of the state average. This is another indication of the tight housing market in the community.

Figure 44: All Units Vacancy Rate for Juneau and Alaska, 2009 -2015



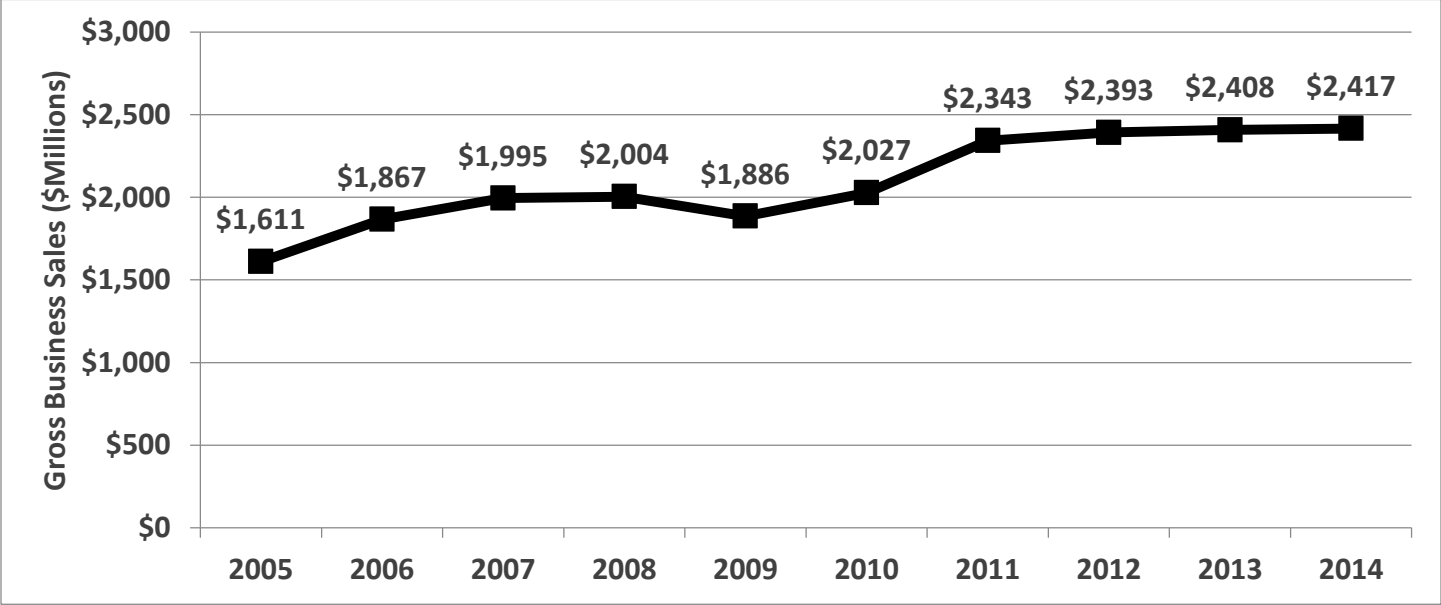
Source: Alaska Housing Finance Corporation, Annual Rental Market Survey (March)

Business and Industry

Gross Business Sales

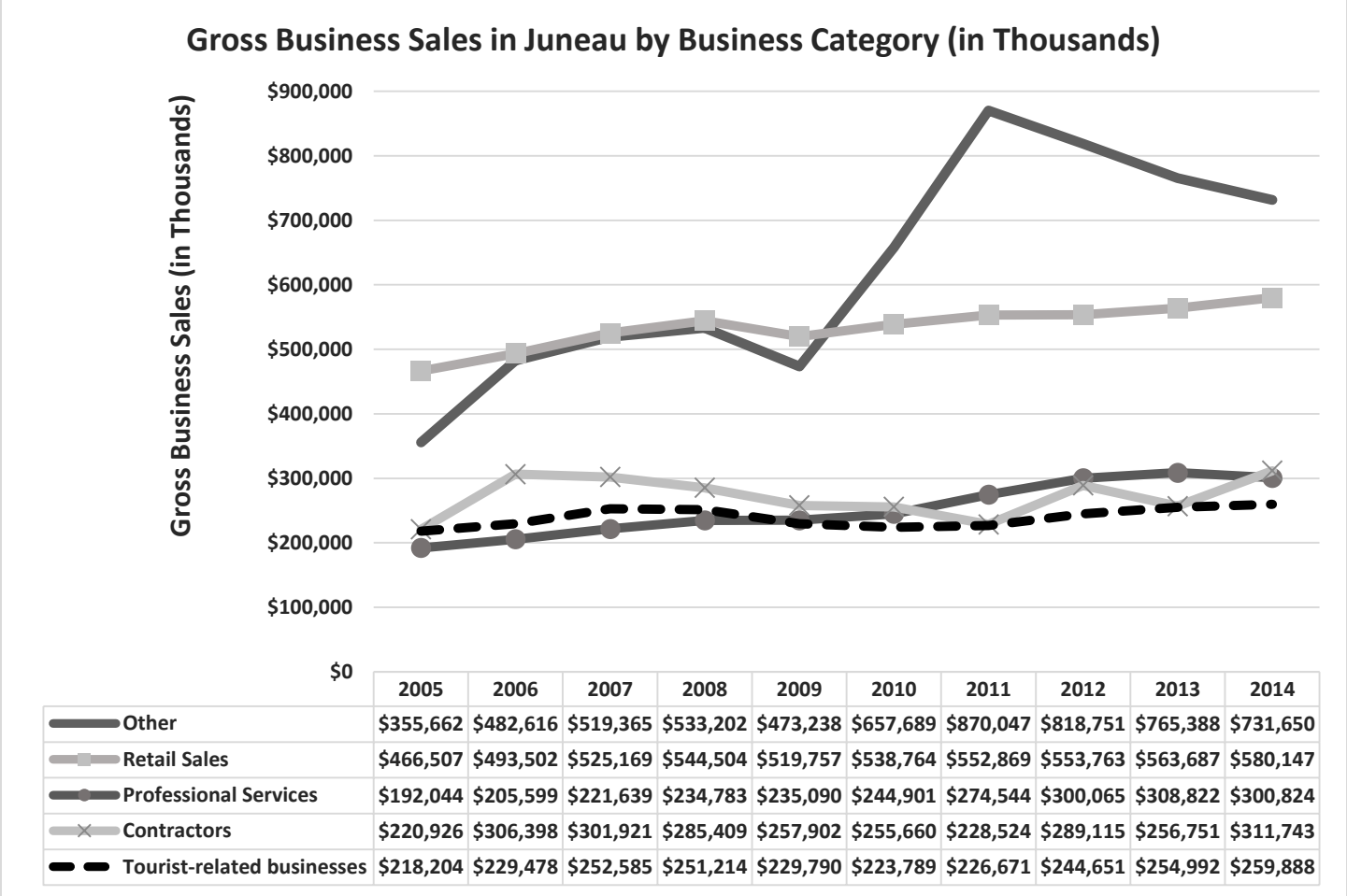
Gross business sales, for a second year, showed a very slight increase to \$2.42 billion dollars. While increased sales continued in the retail sector and contractors saw gains for the year, the biggest drop in gross sales was in the category that includes mineral sales, wholesale equipment, food suppliers, and fuel companies.

Figure 45: Gross Business Sales in Juneau (\$Millions), 2005 – 2014



Source: City & Borough of Juneau Sales Tax Office; Comprehensive Annual Financial Report, July 1, 2013 to June 30, 2014.

Figure 46: Gross Business Sales in Juneau by Business Category (in Thousands), 2005 - 2014

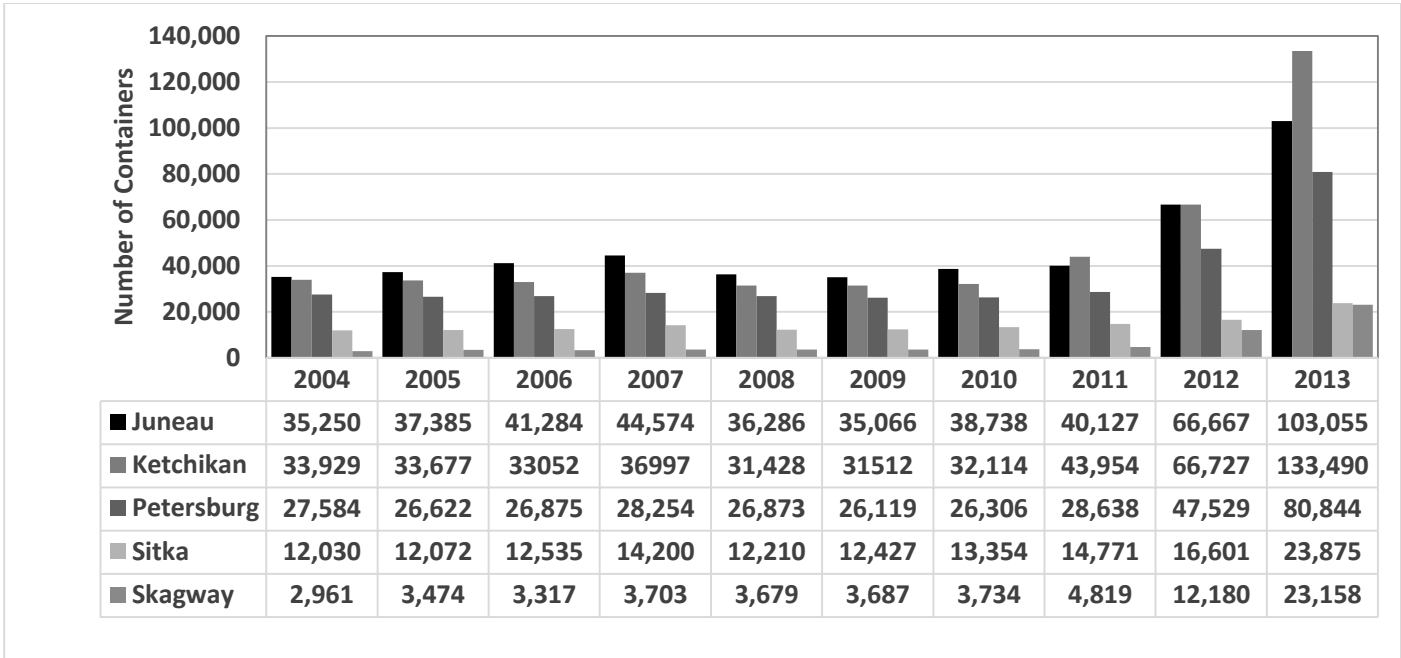


Source: City & Borough of Juneau Sales Tax Office; Comprehensive Annual Financial Report, July 1, 2013 to June 30, 2014. Note: “Other” category includes mineral sales, wholesale equipment, food suppliers, and fuel companies. Tourist related business sales are inclusive of some categories of retail sales.

Freight Volumes

Juneau, Ketchikan and Petersburg saw a significant waterborne container traffic increase in 2013, the latest year for which data is available. Of Juneau’s total 103,055 TEUS (a unit of cargo capacity based on the volume of a 20-foot-long intermodal container), about 73 percent is inbound traffic and 27 percent is outbound. In contrast, Ketchikan and Petersburg volume is 65 percent outbound and 35 percent inbound.

Figure 47: Total Loaded Waterborne Container Traffic for Selected Southeast Ports, 2004 – 2013



Source: US Army Corps of Engineers, Navigation Data Center, U.S. Waterborne Container Statistics Data Center **Note:** Numbers are in Twenty Foot Equivalent Units (TEUS).

Travel and Visitor Industry

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

The number of businesses serving the travel and visitor industry increased slightly in Juneau, and remained flat in the region. However, businesses expanded their workforce, growing 4 percent in Juneau and 3 percent region-wide. Regional employment exceeded 6,300 employees, with an associated contribution to the economy of over \$184 million in payroll. The total earnings increased for Juneau by 10 percent, and earnings increased for the region as a whole by 7 percent.

Figure 48: Leisure, Hospitality, and Transportation Industries Employment and Earnings, 2010-2014

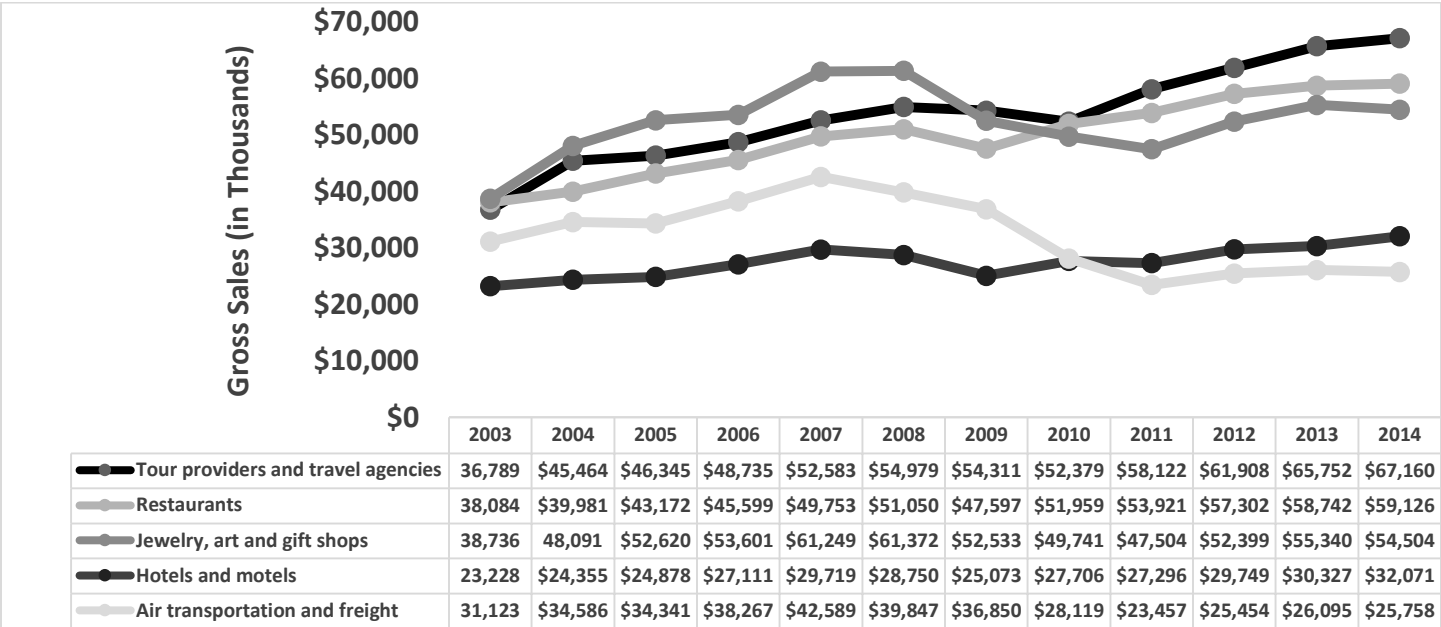
	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2010	172	606	2,488	5,687	\$65,526,803	\$155,129,875
2011	180	613	2,511	5,742	\$67,339,053	\$160,488,826

	Number of Firms		Average Employment		Total Earnings	
2012	186	641	2,642	6,059	\$68,591,819	\$170,219,568
2013	185	643	2,620	6,133	\$65,187,583	\$177,925,282
2014	190	645	2,732	6,323	\$71,830,777	\$184,722,667
% Change from 2013	3%	0%	4%	3%	10%	7%

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

In 2014, Juneau’s gross business sales by tourist-related businesses were \$259.8 million, an increase of 2 percent from the prior year. Tour providers and travel agencies are the largest category of sales in the tourism sector, followed by restaurants and then by jewelry, art and gift shops.

Figure 49: Gross Business Sales by Tourist-Related Businesses, Juneau 2005 -2014

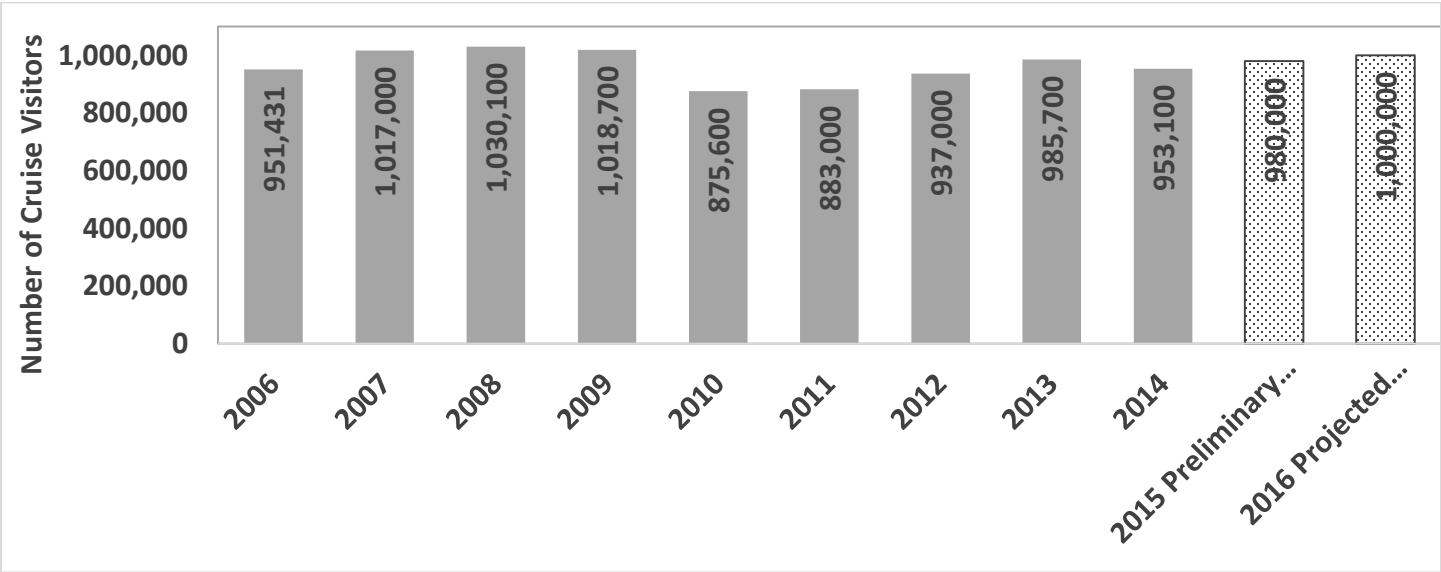


Source: City & Borough of Juneau Sales Tax Office; Comprehensive Annual Financial Report, July 1, 2013 to June 30, 2014

Cruise Ship Visitation

Cruise passenger visitation was down in 2014, due to a decrease in capacity resulting from changes that Princess Cruise Lines made to their Alaska Fleet. Preliminary numbers for the 2015 season show a return to prior year levels, and 2016 estimates show visitation to continue to increase to the 1 million visitor level.

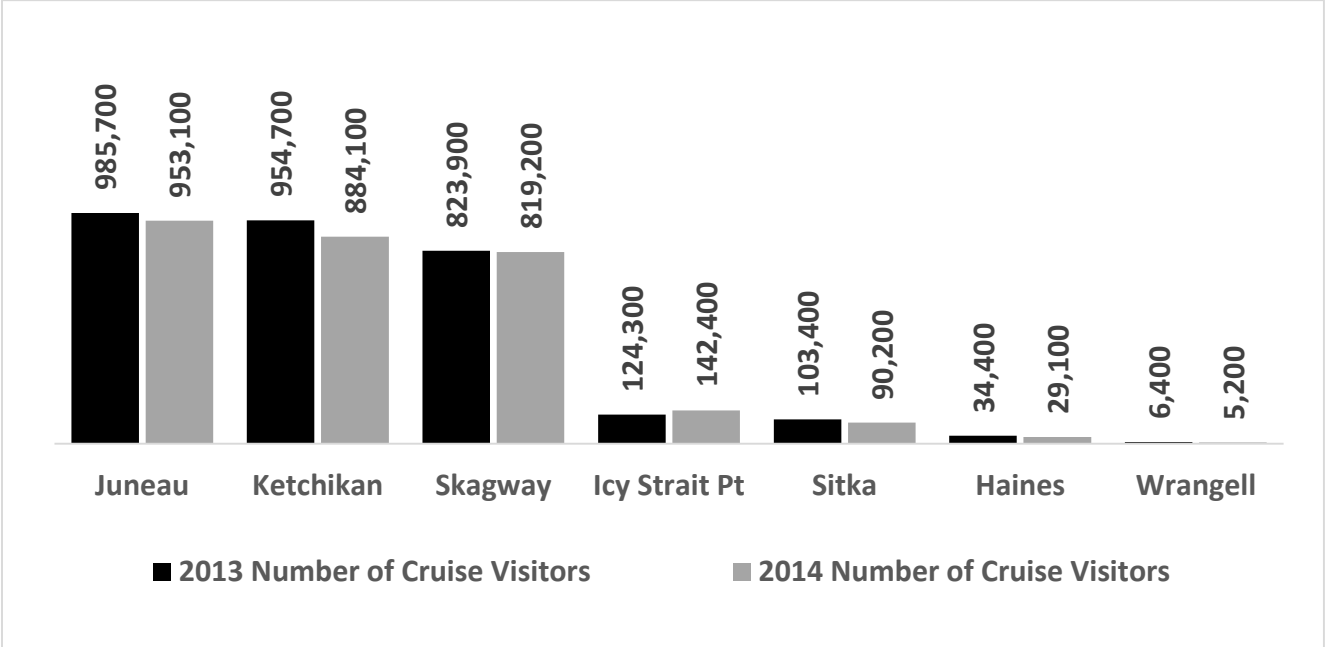
Figure 50: Cruise Passengers Visiting Juneau, 2005 -2016 (Projected Estimate)



Source: Cruise Line Agencies of Alaska and McDowell Group. Note: 2015 and 2016 Estimates are state-wide passenger volumes.

Juneau, followed by Ketchikan and then Skagway, have by far the largest number of cruise visitors. In 2014, Icy Strait Point increased cruise passenger visits despite the regional downturn.

Figure 51: Cruise Passengers Volumes for Southeast Alaska Communities, 2013 – 2014



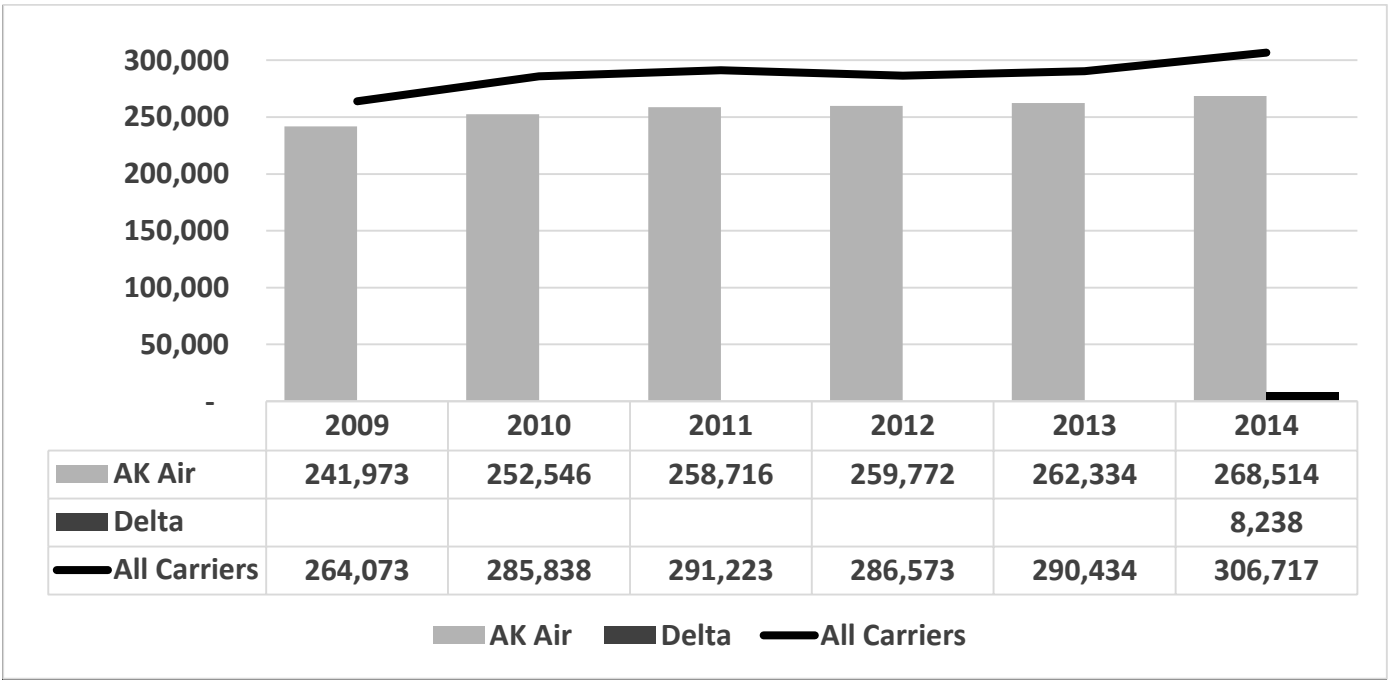
Source: Cruise Line Agencies of Alaska and McDowell Group. Note: These figures do not include most small cruise ship volumes. Note: These figures do not include most small cruise ship lines.

Airline Passenger Traffic

Passenger volume at the Juneau airport includes tourism travel, local and state business and government activity and residential travel. Passenger enplanement statistics, collected by the Bureau of Transportation Statistics, can serve as an indicator of economic activity in Juneau, since all business and most independent tourism visitors come predominantly by air to Juneau.

With the arrival of Delta Air Lines to the Juneau market, capacity increased slightly and deplanements were up by 5.6 percent.

Figure 52: Scheduled Air Passenger Deplanements at Juneau International Airport, 2010 – 2014



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

Figure 53: Scheduled and Non-scheduled Air Passenger Enplanements at Select Southeast Communities

	2012	2013	2014	Compound Annual Growth 2012 - 2014
Juneau	353,048	359,291	375,828	3.2%
Ketchikan	103,136	109,433	115,948	6.0%
Sitka	68,222	67,989	72,027	2.8%
Petersburg	18,800	20,046	19,065	0.7%
Wrangell	11,434	11,807	11,828	1.7%
Yakutat	10,100	10,135	10,619	2.5%
Hoonah	9,564	10,468	9,849	1.5%
Gustavus	9,509	10,176	9,484	-0.1%
Haines	10,093	10,106	8,368	-9.0%
Skagway	7,532	8,050	7,296	-1.6%
Metlakatla	3,927	4,243	4,057	1.6%
Craig	3,246	3,387	2,869	-6.0%
Thorne Bay	2,799	2,681	2,744	-1.0%

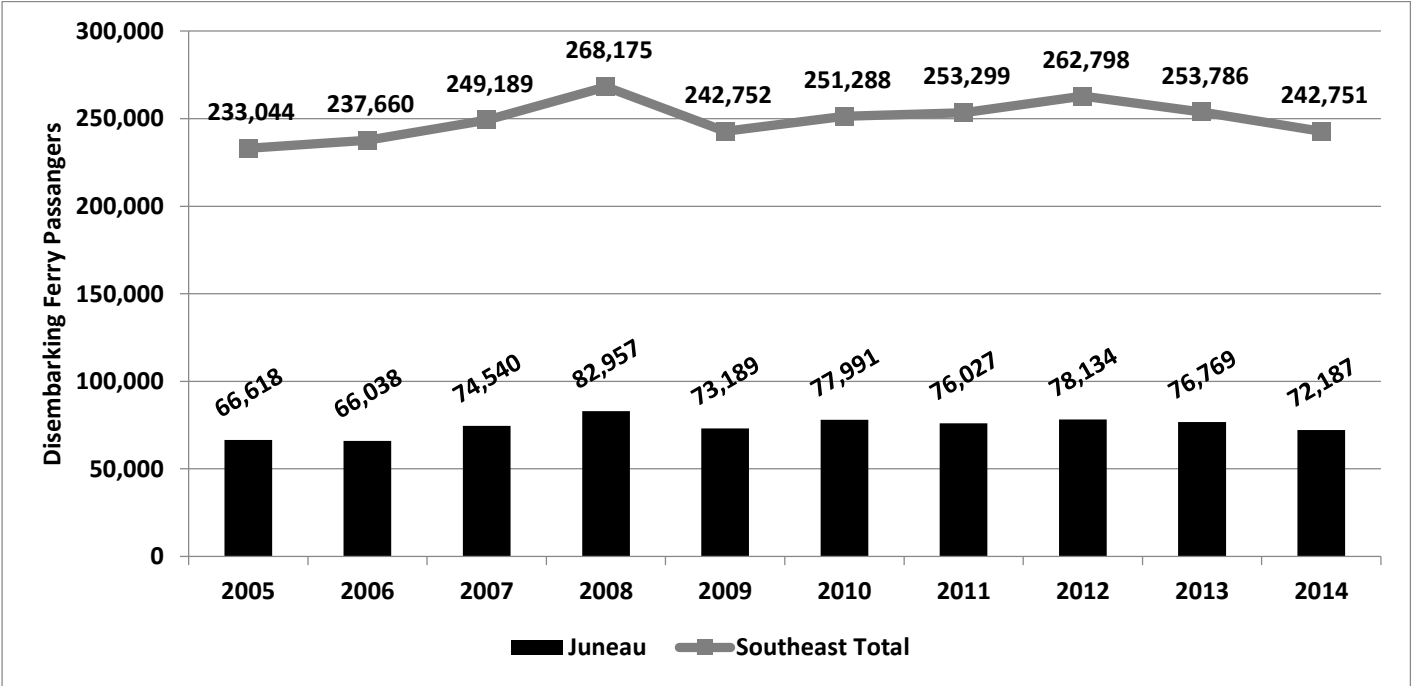
Source: Federal Aviation Administration, Airports, Final CY 2013 ACAIS

Ferry Traffic

Independent travelers to Juneau can arrive only by water and air. Ferry traffic volume reflects tourism travel as well as residential and regional personal travel. The number of disembarking passengers in Juneau decreased 6 percent in the past year, dropping to a level not seen since 2009. Much of the drop can be explained by a 12 percent reduction in port departures.

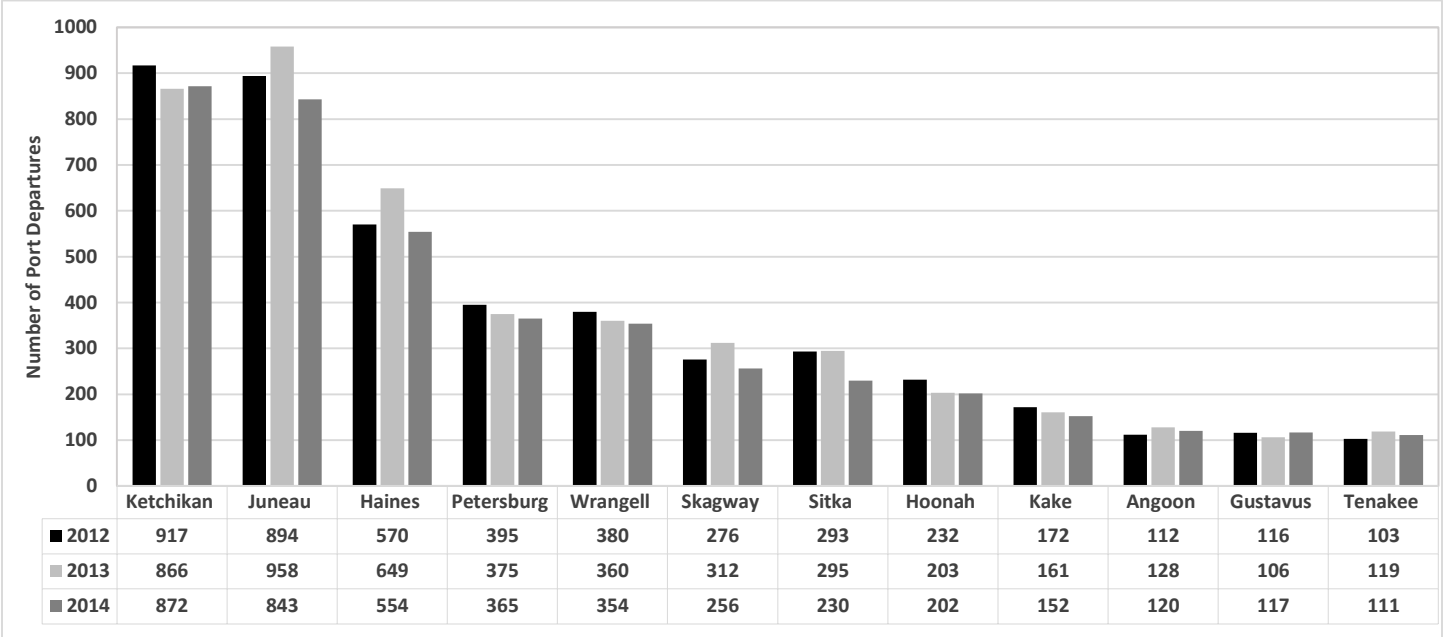
Region-wide, the number of disembarking passengers decreased by over 4 percent. Port departures decreased at most communities, with Yakutat, Sitka and Skagway experiencing the greatest percent decrease in departures.

Figure 54: Disembarking Ferry Passenger Traffic Juneau and Southeast, 2005-2014



Source: Alaska Department of Transportation, Alaska Marine Highway System, 2014 Annual Traffic Volume Report

Figure 55: Alaska Marine Highway Port Departures for Select Communities, 2011 – 2013

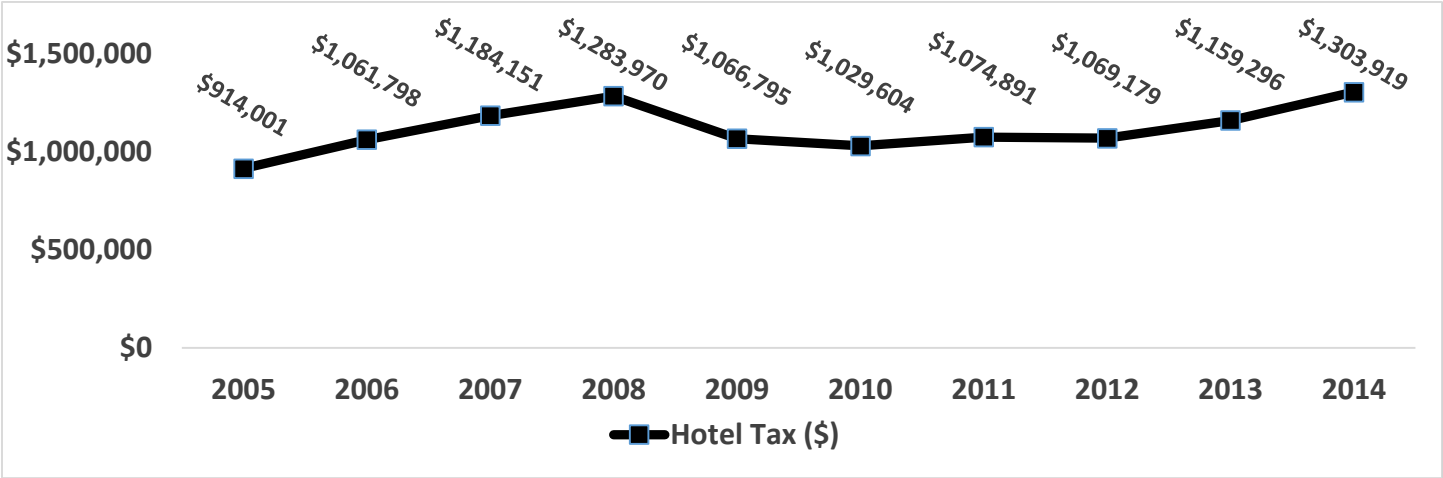


Source: Alaska Department of Transportation, Alaska Marine Highway System, 2014 Annual Traffic Volume Report

Visitor-related Tax Revenue

Juneau’s hotel tax can be used to indicate the health of the independent tourism and the business travel sectors. Hotel tax revenue continued to show strong gains in 2014, increasing by 22 percent from 2013.

Figure 56: Juneau Hotel Tax Revenue, 2005 – 2014



Source: City and Bureau of Juneau Comprehensive Annual Financial Report, July 1, 2013- June 30, 2014, Statistical Section

Health Care Industry

While the number of private health care and social service firms continued to grow in 2014, the industry had a slight contraction in employment region-wide.

Figure 57: Private Health Care and Social Services Employment and Payroll, 2010-2014

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2010	114	218	1,767	3,717	\$63,334,370	\$146,251,594
2011	115	227	1,797	3,854	\$64,980,771	\$152,807,120
2012	122	236	1,795	3,909	\$67,270,222	\$158,399,236
2013	121	248	1,739	3,839	\$68,097,281	\$158,927,374
2014	124	257	1,716	3,717	\$70,935,083	\$159,087,405
% Change from 2013	2%	4%	-1%	-3%	4%	0%

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

Natural Resources and Mining Industry

Juneau’s strong job growth in the natural resources and mining sector (predominantly mining employment) ended in 2012. After a decrease in 2013, employment levels have held steady in 2014. Region-wide, mining employment has had continual gains for the past several years. The sector continued to increase its contribution to the regional economy with a total payroll increase of 7 percent in 2014. If gold and silver prices continue to decrease, there will be pressure on area mines to reduce costs, which includes employment.

Figure 58: Natural Resources and Mining Employment and Payroll, 2010-2014

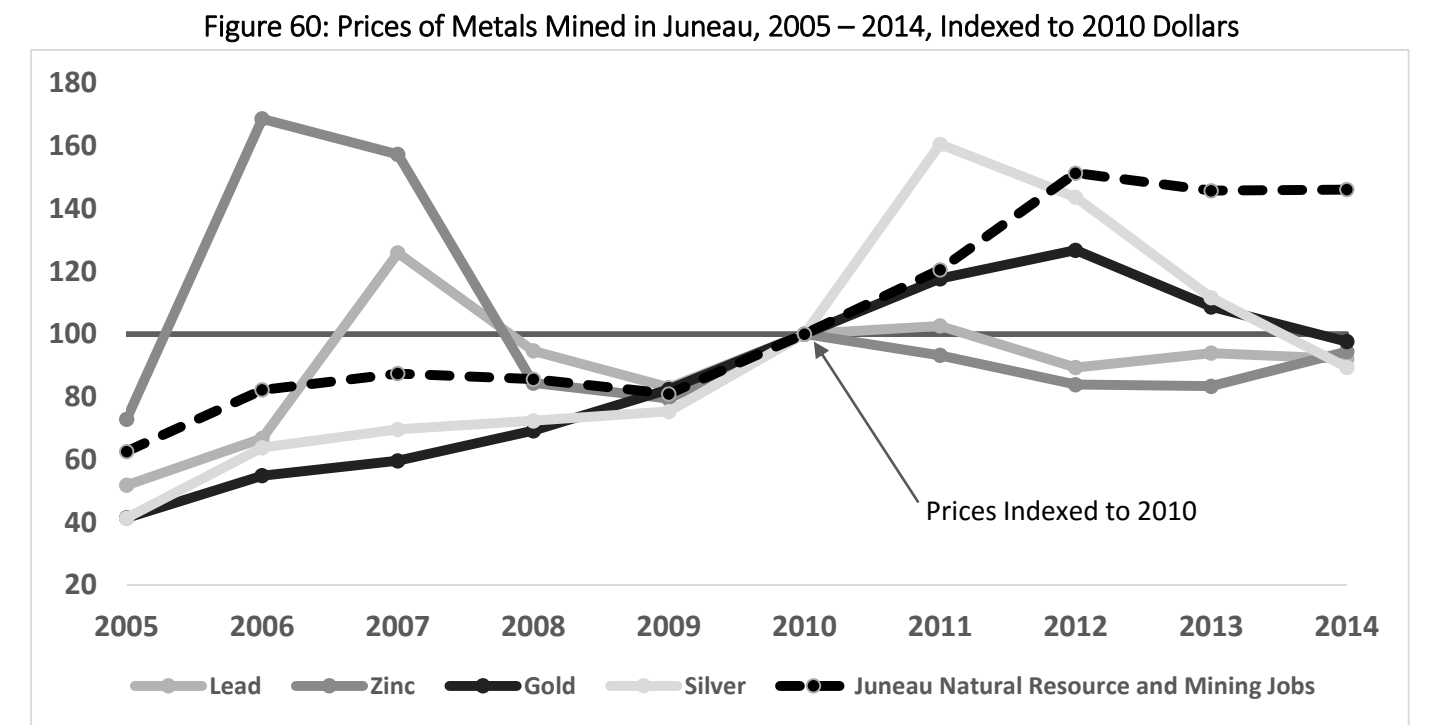
	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2010	8	69	556	932	\$50,659,951	\$69,601,643
2011	9	68	670	1,081	\$59,442,055	\$80,332,909
2012	10	67	841	1,202	\$79,556,099	\$98,628,258
2013	11	76	810	1,173	\$80,205,983	\$100,074,331
2014	12	77	812	1,184	\$80,470,161	\$100,498,958
% Change from 2013	9%	1%	0%	1%	0%	0%

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

Figure 59: Southeast Metal Ore Mining Employment and Payroll, 2010-2014

	Number of Firms	Average Employment	Total Earnings
2010	5	485	\$47,066,636
2011	5	566	\$53,261,932
2012	4	676	\$65,053,514
2013	6	708	\$71,069,198
2014	5	739	\$75,856,363
% Change from 2013	-	4%	7%

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



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

Southeast Alaska Resident Fishermen

Juneau had 764 residents participate in the Southeast Alaska fish harvest in 2014, representing just under 16 percent of total regional participants. The number of fishing permits issued, the number of permit holders, the number of fishermen who fished, and the number of crew licenses were all down from 2013 region-wide, most likely due to the 2 year return cycle in the regional fish harvest.

Figure 61: Southeast Alaska Resident Commercial Fishermen, 2014 Preliminary

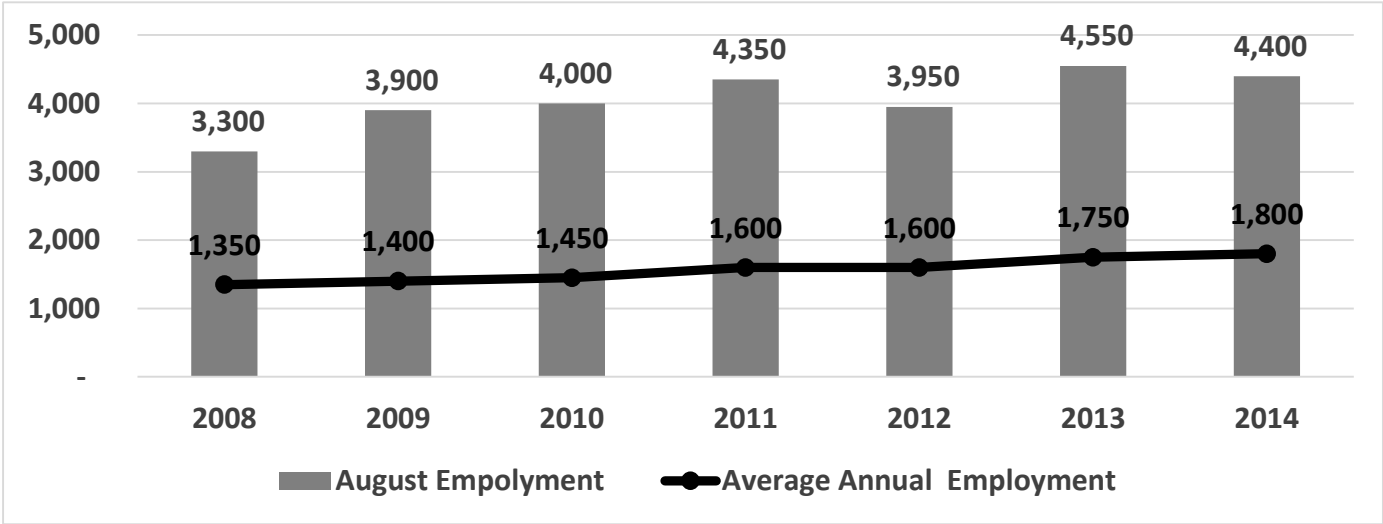
Borough or Census Area	Fishing Permits Issued	Permit Holders	Fisherman who Fished	Fishing Crew Licenses	Total Southeast Participation
Sitka	1,073	562	457	587	1044
Petersburg	1,138	503	413	450	863
Juneau	643	401	280	484	764
Ketchikan Gateway	598	351	240	390	630
POW-Hyder	543	301	228	290	518
Wrangell	391	210	159	246	405
Hoonah-Angoon	277	186	115	105	220
Haines	171	112	91	109	200
Yakutat	248	158	130	64	194
Total Southeast 2014	5,082	2,784	2,113	2,725	4,838
Total Southeast 2013	5,162	2,801	2,130	2,738	4,868
Change 2013-2014	-1.5%	-0.6%	-0.8%	-0.5%	-0.6%

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City", 2014 Preliminary; Alaska Department of Fish & Game, 2014 Comm. Crew Licenses dataset.

Seafood Processing Employment in Southeast Alaska

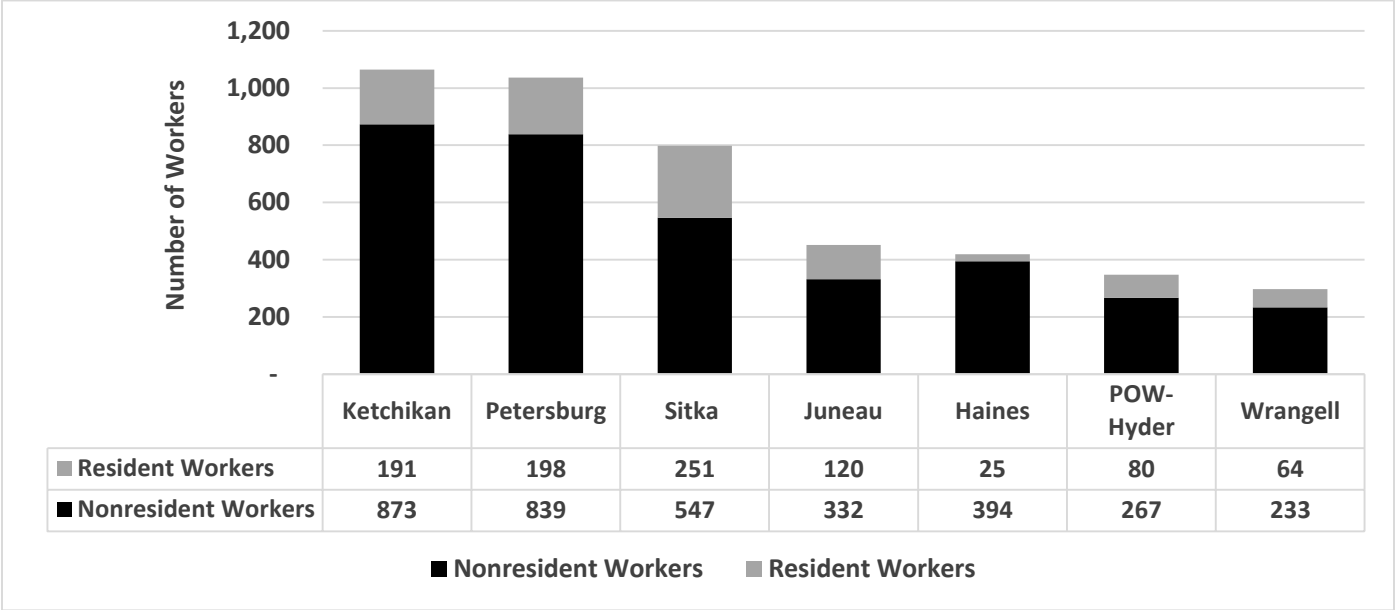
While the annual average employment in seafood processing was slightly up in 2014, peak employment was down from 2013, again most likely due to lower fish returns to the region in even years.

Figure 62: Southeast Alaska Seafood Processing Peak Employment, 2008-2014



Source: Alaska Department of Labor and Workforce Development, Monthly Employment Statistics, Southeast Economic Region.

Figure 63: Resident and Nonresident Seafood Processing Workers, Select Communities 2013

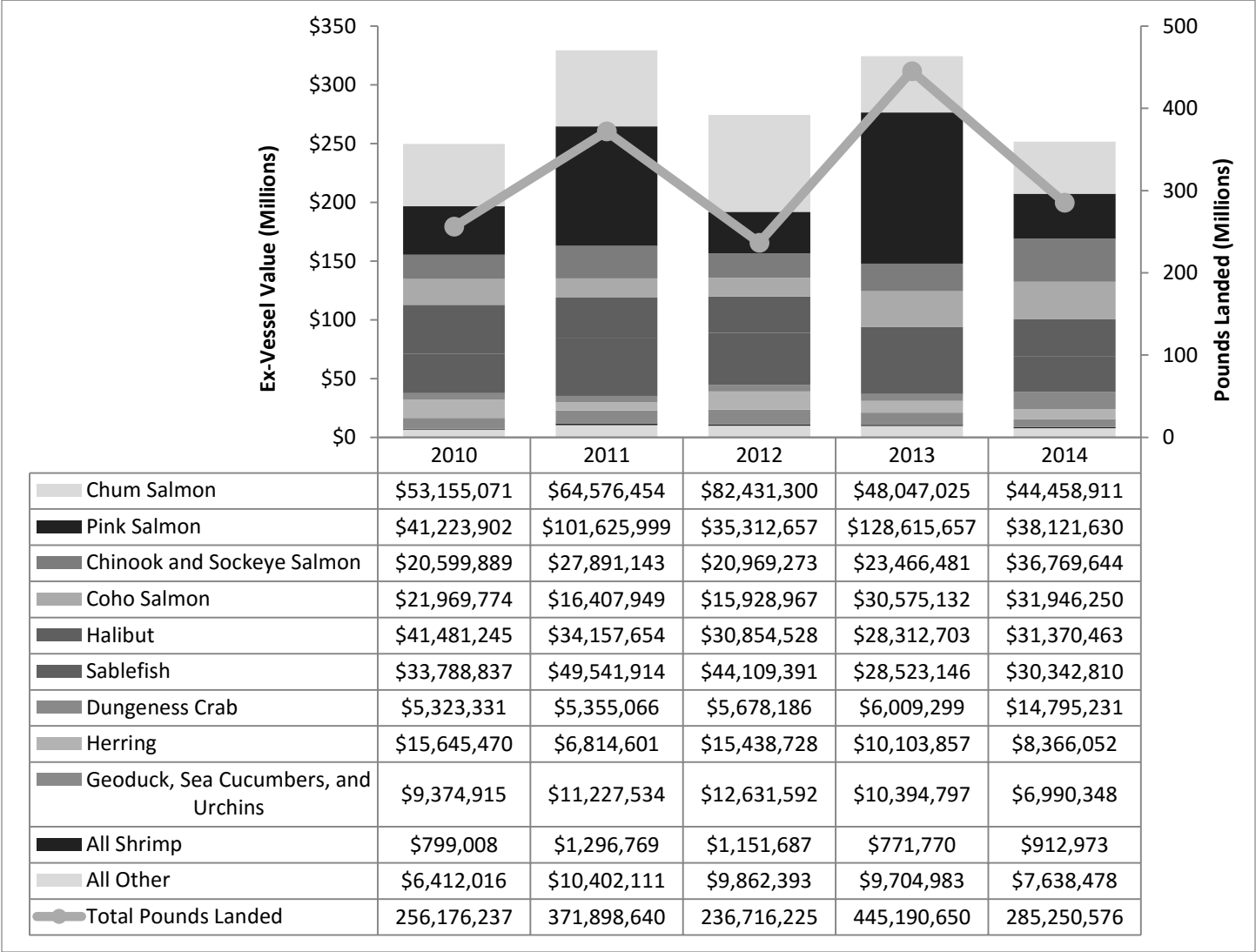


Source: Alaska Department of Labor and Workforce Development, "Residency of Alaska Workers", 2013 Dataset, Table 12. Note: Worker count is the cumulative number of workers who worked over the course of a year, not the number of jobs.

Commercial Harvest in Southeast Alaska

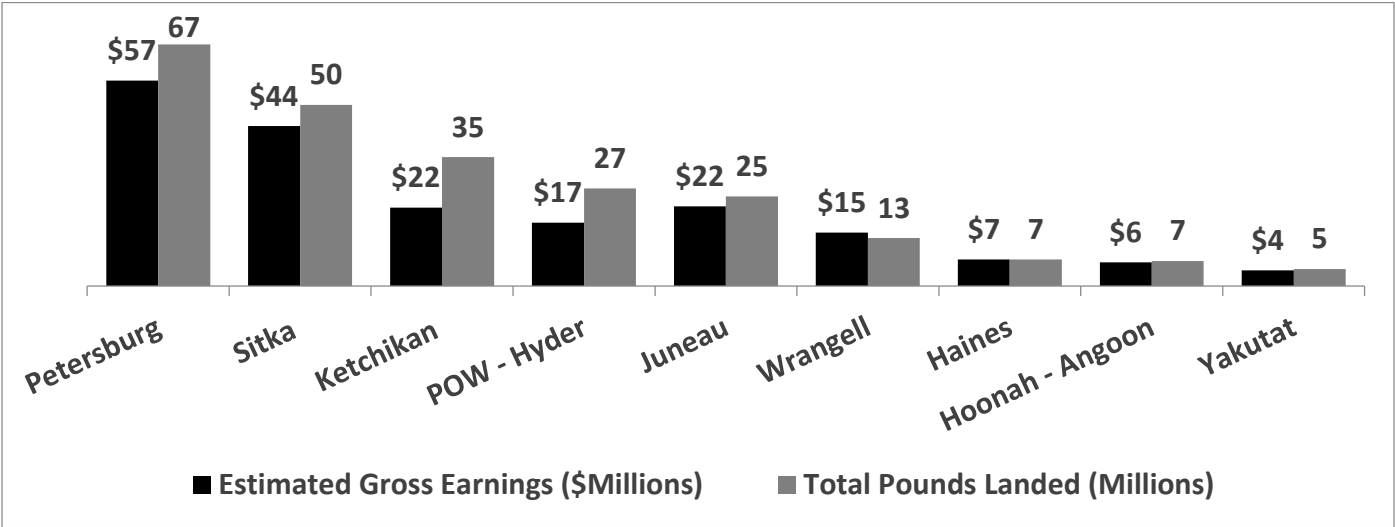
The 2014 Southeast Alaska commercial fisheries fish harvest of 285.3 million fish purchased was down from 2013 but stronger than the comparable year of 2012. However, total ex-vessel value was below 2012 levels, due mostly to the pink salmon returns. Chinook and Sockeye ex-vessel showed strong gains in 2014.

Figure 64: Southeast Alaska Commercial Seafood Industry Ex-Vessel Value, 2010 - 2014



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

Figure 65 Estimated Gross Earnings (\$Millions) and Pounds Landed (Millions) by Southeast Alaska Residents for Select Communities, 2014



Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2014

Figure 66: Commercial Fish Harvest by Southeast Alaska Residents: Gross Earnings (Value) and Pounds Landed (Volume) in Thousands, 2012-2014

Area of Residency	Value 2012	Value 2013	Value 2014	Volume 2012	Volume 2013	Volume 2014
Petersburg	\$59,556,845	\$70,790,495	\$56,560,068	50,955,039	99,424,452	66,545,202
Sitka	\$43,158,774	\$48,112,305	\$44,011,655	25,565,752	50,354,002	35,755,752
Juneau	\$23,796,873	\$25,909,198	\$21,931,311	17,159,523	26,511,925	17,882,280
Ketchikan	\$28,838,844	\$24,593,049	\$21,575,928	31,926,237	35,641,819	33,956,621
POW-Hyder	\$17,134,767	\$20,952,058	\$17,420,614	16,676,770	27,081,015	20,866,830
Wrangell	\$12,852,615	\$14,460,205	\$14,654,672	9,882,855	15,579,597	12,103,045
Haines	\$8,818,719	\$6,938,516	\$7,287,351	8,075,817	6,842,838	5,609,197
Hoonah-Angoon	\$6,394,652	\$8,449,414	\$6,468,287	3,274,413	7,636,856	3,773,269
Yakutat	\$3,901,212	\$5,448,699	\$4,286,404	2,335,703	3,464,376	2,923,456
Total Southeast	\$204,453,301	\$225,653,939	\$194,196,290	165,852,109	272,536,880	199,415,652

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2014

State of Alaska Shared Fish Taxes

Alaska statutes provide that a percentage of revenue collected from certain taxes be shared with municipalities. Fisheries Business Tax and Fishery Resource Landing Tax are two such taxes. For fiscal year 2014, Southeast communities received a total of \$5.46 million from these taxes, up 19 percent from the prior year.

Figure 67: Select Southeast Communities Receiving Shared Fish Taxes, 2014

	Fisheries Business Tax	Fishery Resource Landing Tax
Petersburg	\$1,249,730	\$3,488
Sitka	\$1,127,772	\$13,914
Ketchikan Borough	\$783,700	
Ketchikan City	\$743,083	
Haines Borough	\$438,083	
Juneau	\$395,010	
Craig	\$314,704	
Yakutat Borough	\$250,998	
Hoonah	\$110,249	
Kake	\$24,241	
Total Southeast	\$5,442,901	\$17,402

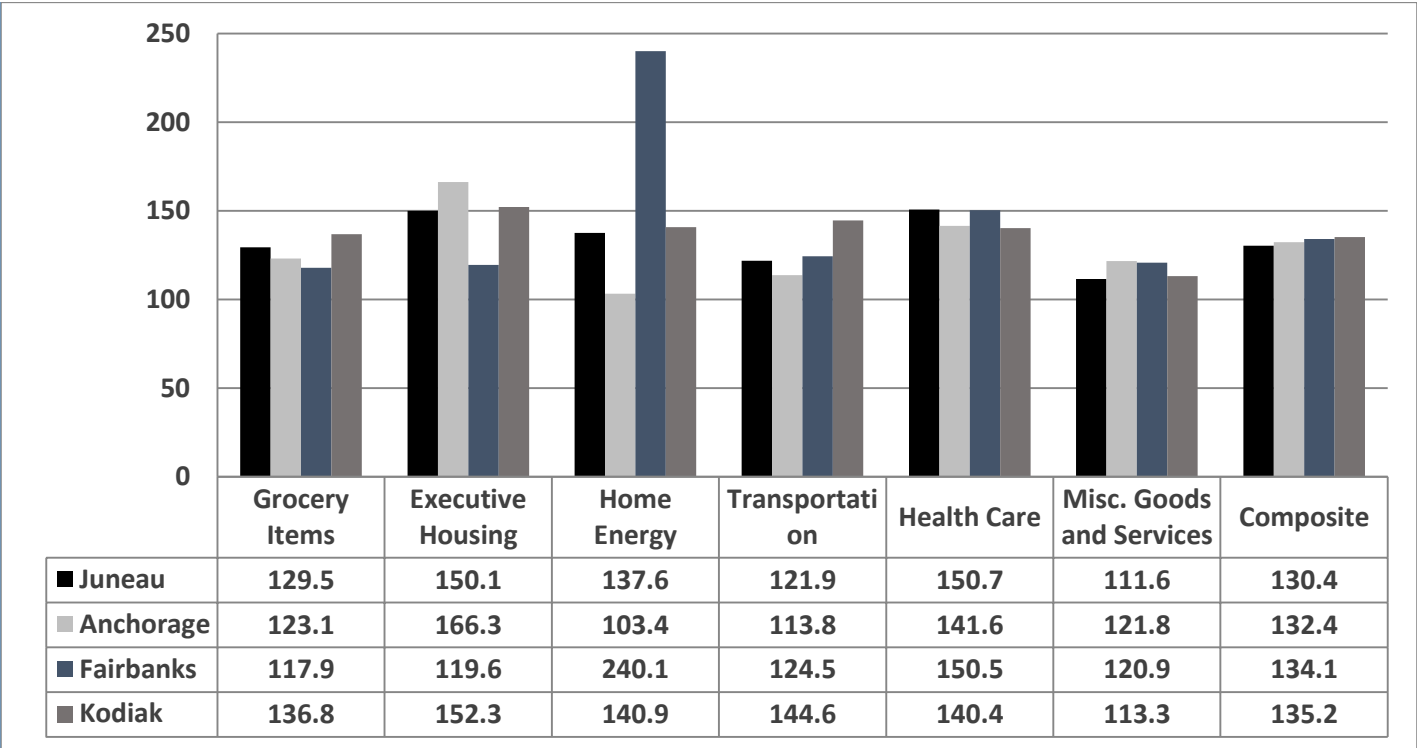
Source: Alaska Department of Revenue, Tax Division, FY2014 Shared Taxes and Fees Annual Report

Cost of Living

Cost of Living Index (COLI)

The Cost of Living Index (COLI) is a nationwide quarterly survey of living expenses in 271 U.S. cities. It establishes the average cost of living in the U.S. based on the cost of consumer goods and services typical for a moderately affluent professional or executive household. With the average cost for all communities set at 100, Juneau’s composite score was 130.4 for the second quarter of 2015, or approximately 30 percent more expensive than the average. This is a slight improvement over the second quarter of 2014, when Juneau scored 132.2. Alaska’s capital city continues to have the most expensive health care costs but overall was slightly less expensive than Fairbanks, Anchorage and Kodiak.

Figure 68: Comparative Cost of Living Index (COLI) for Select Communities, Second Quarter 2015



Source: Council for Community and Economic Research, Cost of Living Index, Second Quarter (June) 2015.

Military Cost of Living Index

The Department of Defense gives a Cost of Living Allowance (COLA) to compensate active duty military personnel who are assigned to duty stations with above average living costs. They measure approximately 120 goods and services in each place and then assign the COLA adjustment to each location. Juneau gets a 32% boost above the normal COLA, which is slightly less than other communities in the Southeast region and above Anchorage and Fairbanks.

Figure 69: US Military Overseas COLA Adjustment for Select Alaska Communities, October 2015

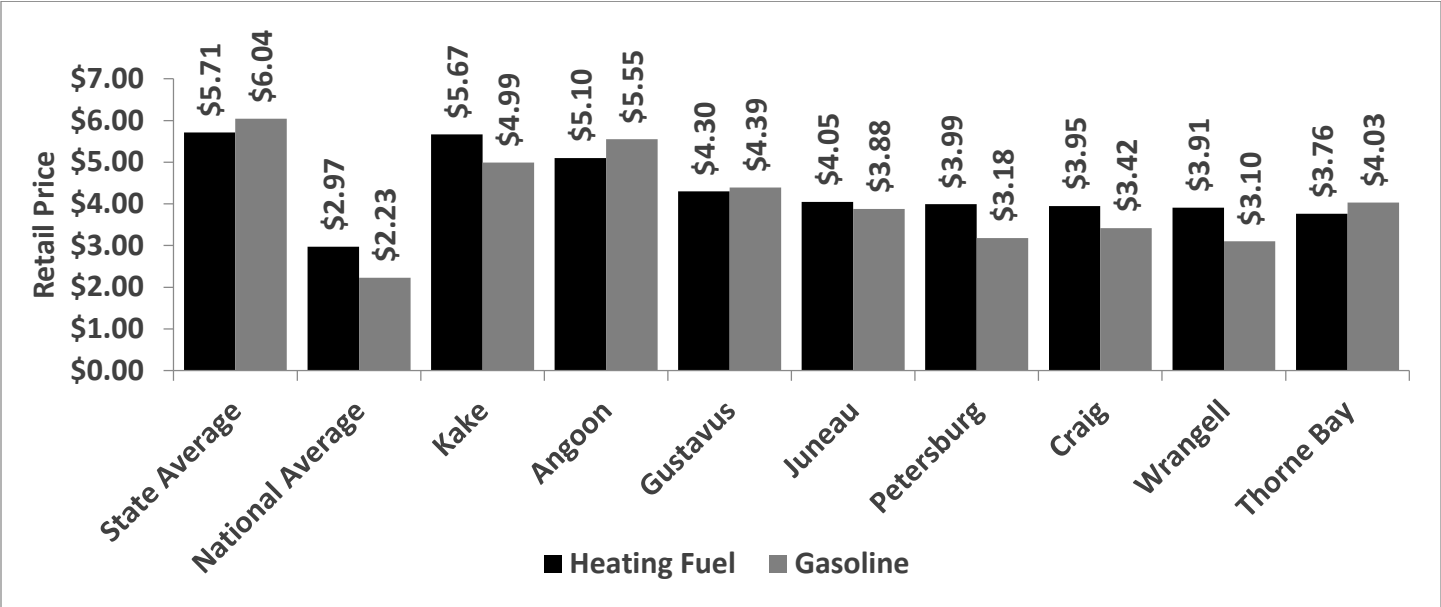
Community	2014 Percent	2015 Percent	Community	2014 Percent	2015 Percent
Anchorage	130%	118%	Ketchikan	142%	136%
Juneau	134%	132%	Petersburg	146%	142%
Fairbanks	134%	120%	Sitka	144%	140%

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

Fuel Oil and Gasoline Costs

The Alaska Department of Commerce, Community and Economic Development collects retail heating fuel and gasoline prices from 100 select communities across Alaska annually in January. In January 2015, the state-wide average heating fuel price for all surveyed communities (excluding the Northern Region) was \$5.71; whereas, the U.S. national average as of January 2015 was \$2.97. The average state-wide survey price of gasoline was \$6.04 per gallon, as compared to the national average gasoline price of \$2.23. While the nation benefited from a drop in energy costs by nearly a dollar since the prior year, there was very little change in the fuel costs in Alaska over the same period.

Figure 70: Heating Fuel and Gasoline Prices of Select Southeast Cities, January 2015



Source: Alaska Department of Commerce, Community, and Economic Development, Division of Community and Regional Affairs, Alaska Fuel Price Report - January 2015 Update.