

**Juneau & Southeast Alaska**

# **Economic Indicators and Outlook**



**Volume  
2022**

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# 2022 JEDC Investors



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September 2022

The Juneau Economic Development Council is pleased to present the 2022 edition of the Juneau and Southeast Alaska Economic Indicators report to our community. We thank those who helped us make this annual publication possible, including the City and Borough of Juneau, which provides core funding to JEDC, and the many organizations who shared their research and information, most notably the Alaska Department of Labor.

2021 included cruise passengers returning in late summer, inflation starting to rise, money from the federal aid packages continuing to flow into the economy, unemployment dropping on a sharp downward trajectory, federal government jobs added, and inflation-adjusted wages growing. Juneau saw over \$109 million in pandemic relief funds enter the economy in 2021 and over \$167 million in 2020. Federal government employment remained steady from 2020, despite losing 25 temporary positions related to the Decennial Census. Nominal values for private sector wages and inflation-adjusted average wages increased beyond what they were in 2019. The service sector saw some gains compared to 2020 but is still far below 2019 levels.

Some indicator trends persisted through the pandemic and into recovery. Juneau's population continues to age while the total population sees slight overall declines. State government jobs in Juneau continue to disappear. Participation in commercial fishing continues to decline while mining continues to grow. Despite the ever-tightening housing market, Juneau has not seen any permits for large multi-housing unit construction since 2019, and it looks like that trend will continue through 2022. Home prices have continued to rise, and houses are selling in record time.

We invite you to engage with our programs and welcome your input on economic development. Please visit [www.JEDC.org](http://www.JEDC.org) or contact us at 523-2300.

Regards,

A handwritten signature in black ink, appearing to read "Garrett Schoenberger".

Garrett Schoenberger  
Chair, Board of Directors

A handwritten signature in black ink, appearing to read "Brian Holst".

Brian Holst  
Executive Director

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Cover Photos by James Cheng (Front)  
and Lindsay Clark (Back)

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## Juneau by the Numbers

	2021		% Change from 2020	% Change from 2019
<b>Employment and Wages</b>				
Total Payroll (Millions)	\$986.3	↑	5.1%	4.1%
Government (Millions)	\$452.8	↑	3.1%	6.6%
Service Sector (Millions)	\$363.9	↑	9.3%	-2.8%
Goods-Producing (Millions)	\$169.5	↑	2.3%	14.1%
Average Wage	\$59,976	↑	1.5%	13.6%
Average Monthly Employment	16,445	↑	3.6%	-8.4%
Service Sector	7,790	↑	5.2%	-16.2%
Goods-Producing	2,009	↑	7.0%	3.5%
State of Alaska	3,480	↓	-1.4%	-5.2%
Local and Tribal	2,457	↑	4.6%	3.1%
Federal Civilian	709	↓	-0.1%	6.6%
Fishermen and Crew (Juneau Residents)	533	↑	5.6%	-25.1%
Unemployment	4.8%	↓	-28.8%	23.1%
<b>Demographics</b>				
Population	32,155	↓	-0.3%	0.5%
0 - 19 Years-Old	7,541	↓	-2.3%	-2.3%
20 - 39 Years-Old	8,961	↓	-1.6%	-0.4%
40 - 59 Years-Old	8,477	↓	-1.8%	-1.2%
60 and Over	7,176	↑	5.6%	7.3%
Median Age	39.2	↑	1.4%	1.8%
<b>Business Sales</b>				
Gross Business Sales (Millions)	\$2,666	↑	15.8%	2.5%
<b>Construction and Housing</b>				
New Housing Permits Issued	71	↑	18.3%	-62.8%
Median Price of Single-Family Home	\$463,000	↑	7.7%	10.3%
<b>Transportation</b>				
Cruise Passenger Arrivals	115,800	↑	312,873%	-91.1%
Air Passenger Enplanements	306,512	↑	84.2%	-33.2%
Ferry Passenger Arrivals	25,299	↑	130.3%	-39.1%

## Southeast Alaska by the Numbers

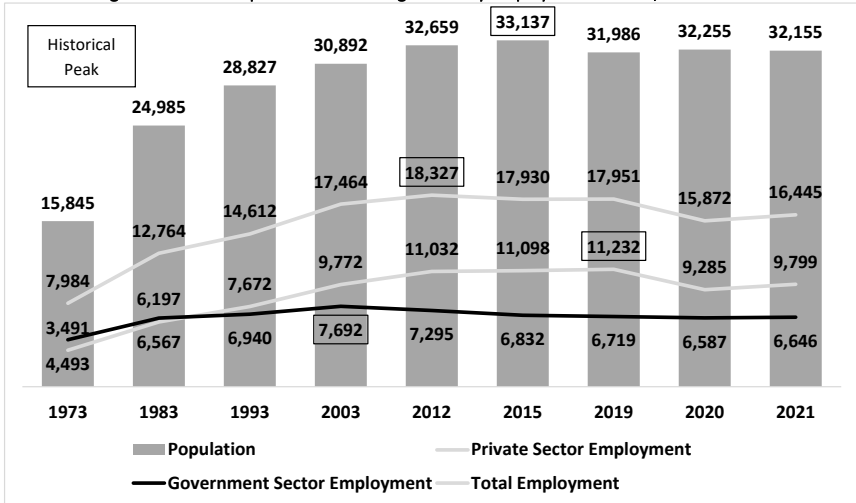
	2021		% Change from 2020	% Change from 2019
<b>Employment and Wages</b>				
Total Payroll (Millions)	\$1,870.51	↑	7.2%	1.8%
Government (Millions)	\$749.89	↑	3.0%	4.1%
Service Sector (Millions)	\$788.55	↑	8.9%	-4.0%
Goods-Producing (Millions)	\$332.07	↑	13.5%	12.0%
Average Wage	\$55,164	↑	2.3%	12.0%
Average Monthly Employment	33,908	↑	4.8%	-9.1%
Service Sector	17,298	↑	29.4%	-15.3%
Goods-Producing	4,680	↑	13.5%	3.5%
State of Alaska	4,403	↓	-0.8%	-6.4%
Local and Tribal	6,147	↑	2.6%	-1.8%
Federal Civilian	1,380	↓	-3.4%	-0.9%
Fishermen and Crew (Southeast Residents)	3,513	↓	-12.1%	-18.0%
Unemployment	6.1%	↓	26.5%	15.1%
<b>Demographics</b>				
Population	72,494	↑	0.3%	0.2%
Without Juneau	40,339	↑	0.8%	-0.1%
<b>Construction and Housing</b>				
New Housing Units Built	165	↓	-6.3%	-41.9%
Without Juneau	97	↓	-18.0%	-6.7%
<b>Commercial Seafood Industry</b>				
Pounds Landed by Resident Fisherman (Thousands)	248,089	↑	146.9%	35.5%
Ex Vessel Value for Resident Fisherman (Thousands)	\$229,769	↑	117.3%	37.2%
<b>Transportation</b>				
Air Passenger Arrivals	709,919	↑	84.1%	-225.4%
Ferry Passenger Arrivals	76,839	↑	75.9%	-49.5%

## Employment and Earnings

Juneau's average monthly employment increased by 573 jobs (+3.6%) in 2021 based on preliminary job numbers. This follows a decrease of 2,079 jobs between 2019 and 2020. The private sector added 514 jobs (+5.5%) in 2021. Government added 59 jobs (+0.9%) from the previous year.

Federal Government employment decreased by only one job (-0.1%) following the end of temporary positions for the Decennial Census. This is a good sign for Juneau's government sector since it means jobs have been created in other federal agencies.

**Figure 1: Juneau Population and Average Monthly Employment Growth, 1973 to 2021**



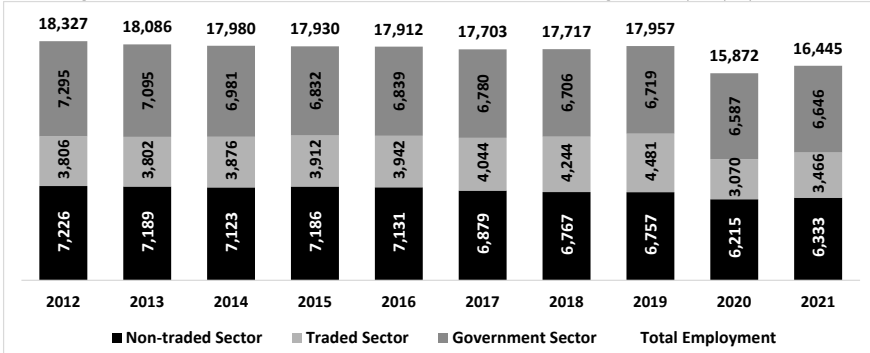
Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Juneau's traded industries (mining, manufacturing, and tourism) bring revenue into the community from outside. Juneau's non-traded service sector generally grows and shrinks with the need for services and retail goods for its population.

Juneau's non-traded industries grew by 396 jobs (+1.9%) in 2021. Even with this increase, the number of jobs in Juneau's non-traded industries is 1,015 jobs below what it was in 2019. Juneau's traded industries saw an overall increase of 396 jobs (+12.9%) in 2021. Mining saw an increase of 52 jobs (+5.9%) after experiencing a loss of 75 jobs in 2020. Manufacturing (includes seafood processing) saw an additional 49 jobs (+18.8%) in 2021, bringing the number of jobs back to the 2019 count. Tourism added 296 jobs (+15.8%) in 2021, bringing the job count to 77.3% of what it was in 2019.



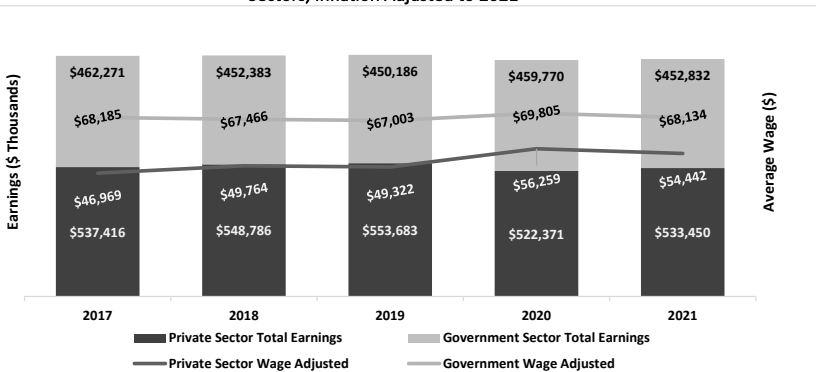
Figure 2: Juneau's Non-Traded, Traded, Government and Total Average Monthly Employment



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 excludes active-duty Coast Guard employment.

On an inflation-adjusted basis, 2021 total earnings in Juneau increased by \$4,140 thousand (0.4%) compared to the previous year, to \$986,281 thousand. Private sector earnings drove the overall increase, rising by \$11.1 million while total government earnings decreased by \$6,938 thousand when adjusted for inflation. The inflation-adjusted average wage for both private sector and government jobs decreased compared to 2020, but stayed higher than the inflation-adjusted average wage for 2019. Private sector average wage in 2021 was \$54,442, \$1,818 lower than in 2020 (-3.2%) and \$5,119 higher than in 2019. The inflation-adjusted average wage for government jobs was \$68,134, \$1,671 lower than it was in 2020 and \$1,132 higher than it was in 2019.

Figure 3: Juneau's Total Earnings (Thousands) and Average Annual Wages for Private and Government Sectors, Inflation Adjusted to 2021

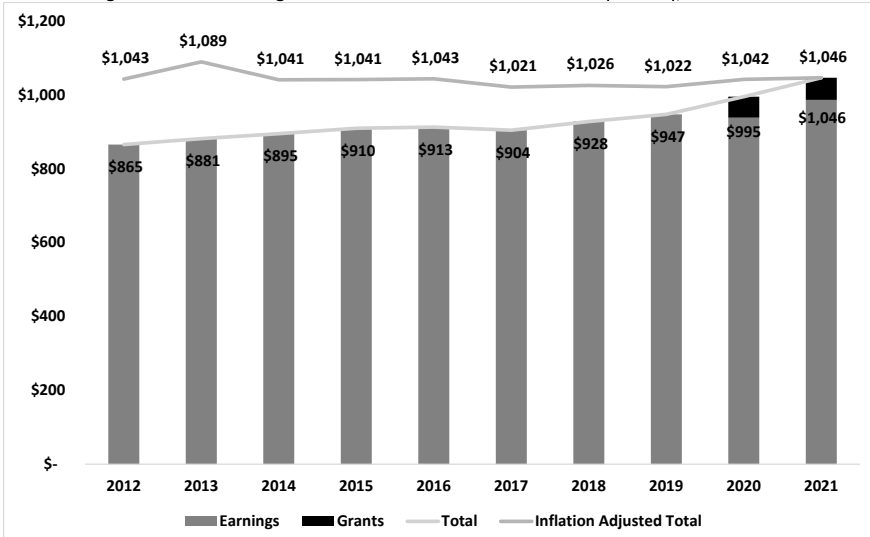


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Earnings are for wage and salary jobs, including full and part-time, temporary or permanent, for all employers. Government sector earnings is exclusive of active-duty Coast Guard employment.

Juneau saw a total of about \$57 million and \$60 million in aid directed to individuals in 2020 and 2021. This aid pushed total earnings in Juneau above 2019 earnings by about \$20 million when adjusted for inflation. Total earnings and aid in 2021 surpassed total earnings in 2019 by \$24 million when adjusted for inflation. This

increase in inflation adjusted earnings stopped a fairly steady decrease in total inflation adjusted earnings that Juneau has seen since 2016.

Figure 4: Juneau Earnings and Financial Assistance for Individuals (Millions), 2012-2021



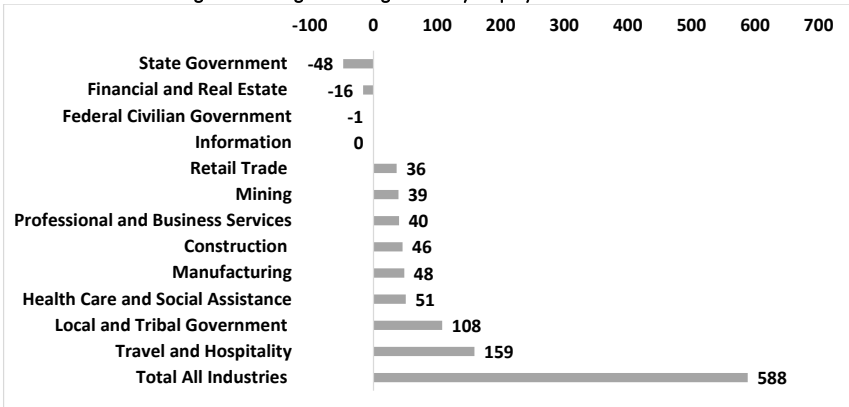
Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages and JEDC analysis.

Note: Financial Assistance for individuals includes Economic Impact Payments, CBJ programs that targeted individuals, and the state-run rental assistance program

## Industry Sector Employment and Earnings

In 2021, Juneau continued to experience a decline in the number of State Government jobs. Average monthly state government employment decreased by 48 jobs (compared to losses of 91, 46, 29, and 143 in preceding years). Local and Tribal Government employment increased by 108 jobs. Federal Government employment decreased by 1 job; since 26 temporary Decennial Census jobs were added in 2020, this decrease is lower than expected. While the Financial & Real Estate industry saw a decrease of 16 jobs, most other industries saw modest increases, which is a good sign after the pandemic-induced job losses of 2020. The Travel & Hospitality industry experienced a slight rebound in employment, increasing by 159 jobs in 2021 after losing 591 in 2020.

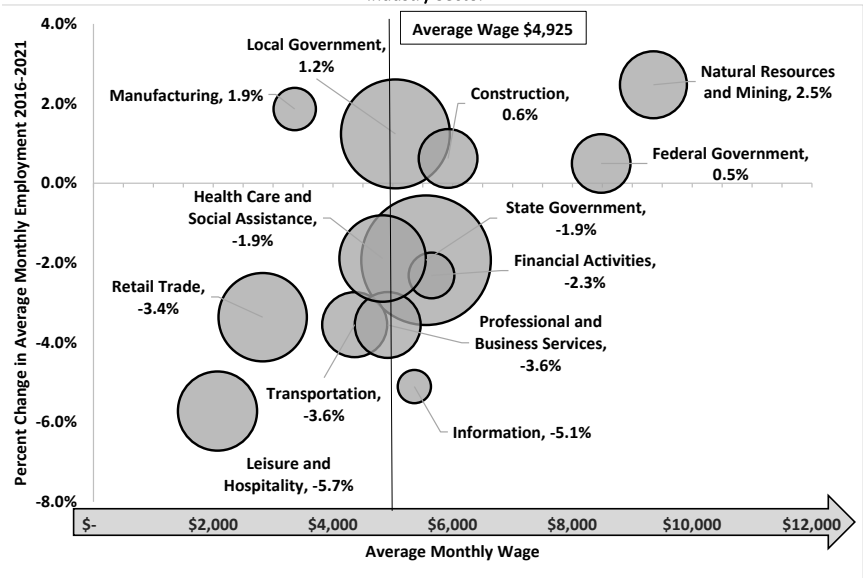
Figure 5: Change in Average Monthly Employment 2020 to 2021



**Source:** Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; **Note:** Local Government includes 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 active-duty Coast Guard personnel stationed in Juneau.

Juneau's economy prospers when high paying jobs increase in the community. An analysis of average wages in 2021 and changes in employment from 2016 to 2021 by sector is shown in Figure 6.

Figure 6: Percent Change in Average Monthly Employment 2016 – 2021 and Average Monthly Wage 2021 by Industry Sector



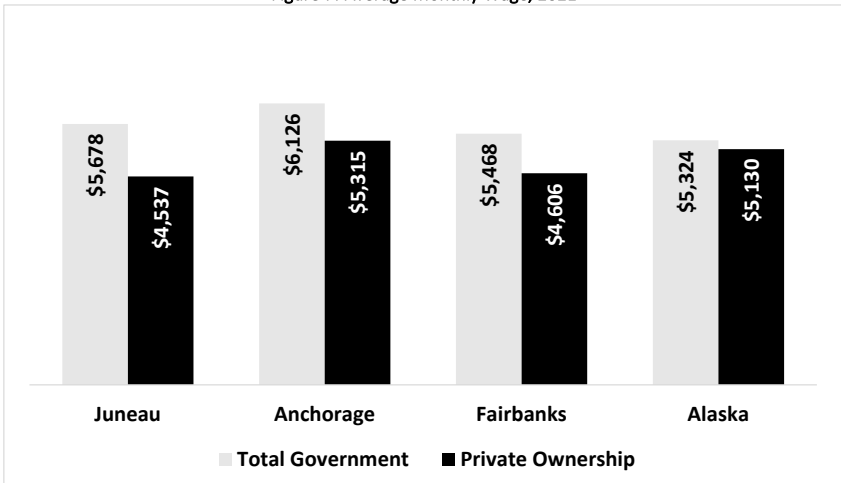
**Source:** Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; **Note:** Local Government includes the Juneau School District employment and enterprises such as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital and tribal employment. The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

How to read Figure 6:

- The size of each circle represents the number of jobs in each industry in 2021. The largest circle is state government, which is the largest employer in Juneau. The next largest employer, local government, is the second largest circle and retail trade is the third.
- The circle's position on the horizontal axis indicates that sector's average monthly wages in 2021. Those sectors paying above Juneau's average monthly wage are located on the right side of the chart and sectors paying below the average monthly wage are on the left. Mining jobs pay the highest average monthly wages in Juneau. Federal government pays the second highest. Leisure and hospitality has the lowest average wage in part due to the high frequency of part-time jobs and lower wages. Each job, whether part-time or full-time, is counted as one job, bringing down the average wage.
- The circle's vertical position, either above the center line or below the center line, shows the % gain or loss of jobs over the last five years for each industry. From 2016 to 2021, Juneau's average monthly employment declined in state government (-1.9%), retail trade (-3.4%), leisure and hospitality (-5.7%), and other industries below the center line. Natural resources and mining experienced the largest increase in average monthly employment (+2.5%), followed by manufacturing (+1.9%) and local government (+1.2%).

As shown in Figure 7, Juneau's average monthly wage for the government sector is \$5,678, above the state average of \$5,324 but below that of Anchorage (\$6,126). In contrast, Juneau's private sector average monthly wage of \$4,537 is lower than that of Anchorage, Fairbanks and the state average. Juneau's average wages in construction, manufacturing, and professional service are also consistently lower than Anchorage, Fairbanks and Alaska as a whole.

Figure 7: Average Monthly Wage, 2021

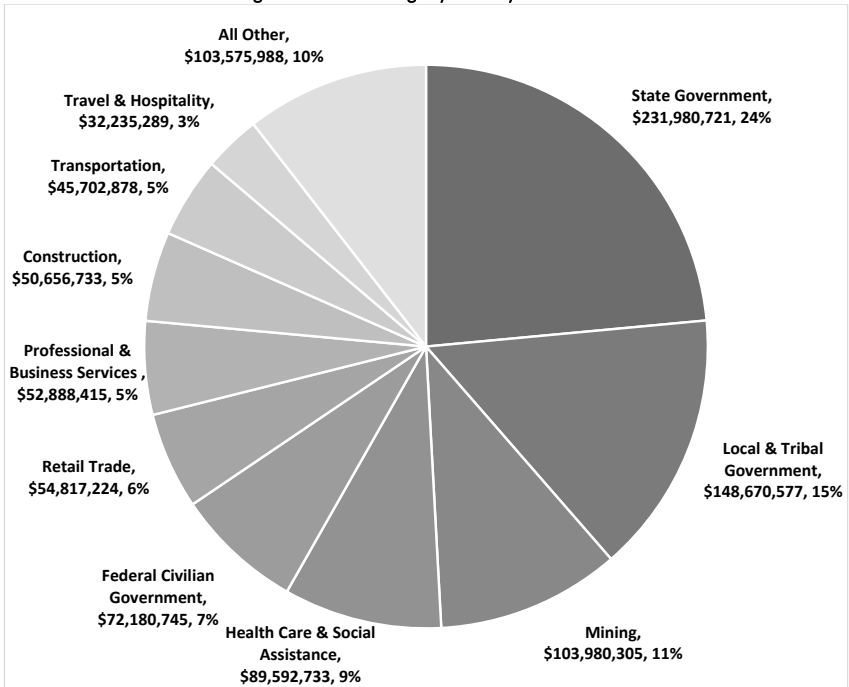


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

Figure 8 shows the total earnings in wage and salary for each sector of Juneau's economy, along with the percentage each sector contributes to total earnings in the community. Juneau's state government sector is the largest contributor, with total earnings of \$231,980,721 contributing 24% of all wage and salary earnings. State government, local government and mining were the top three contributors of wages

and salary earnings in Juneau's economy, and, combined, account for half (50%) of all earnings.

Figure 8: Total Earnings by Industry Sector 2021



**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 and tribal employment. The Federal Civilian Government does not include the Coast Guard personnel stationed in Juneau.

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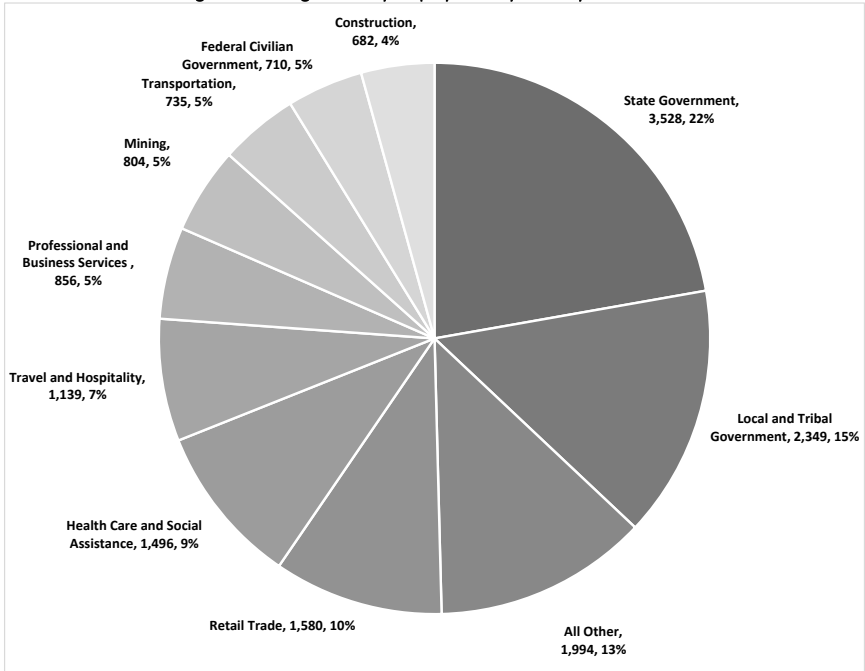
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In comparison, Figure 9 shows the average monthly employment of Juneau's industry sectors along with their percentage of total monthly employment across all industries. State government, local & tribal government, and federal government provide 42% of jobs in the community. While only accounting for 5% of jobs, the mining industry brought in 11% of total earnings for Juneau in 2022, indicating high wages.

Figure 9: Average Monthly Employment by Industry Sector 2021



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 10: Average Monthly Employment and Total Earnings by Sector, Juneau 2020 – 2021

	Average Employment 2020	Average Employment 2021	% Change	Total Earnings 2020	Total Earnings 2021	% Change
Natural Resources & Mining	804	927	15.3%	\$102,045,889	\$103,980,305	1.9%
Construction	667	713	6.9%	\$48,317,459	\$50,656,733	4.8%
Manufacturing	321	370	15.3%	\$13,610,385	\$14,906,703	9.5%
<b>Total Goods Producing</b>	<b>1,864</b>	<b>2,009</b>	<b>7.8%</b>	<b>\$163,973,733</b>	<b>\$169,543,741</b>	<b>3.4%</b>
Retail Trade	1,580	1,616	2.3%	\$52,195,171	\$54,817,224	5.0%
Leisure & Hospitality	1,138	1,297	14.0%	\$25,521,270	\$32,235,289	26.3%
Health Care & Social Assistance	1,495	1,546	3.4%	\$82,821,852	\$89,592,733	8.2%
Transportation	734	873	18.9%	\$37,110,058	\$45,702,878	23.2%
Information, Financial, and Real Estate	674	658	-2.4%	\$40,853,506	\$43,764,008	7.1%



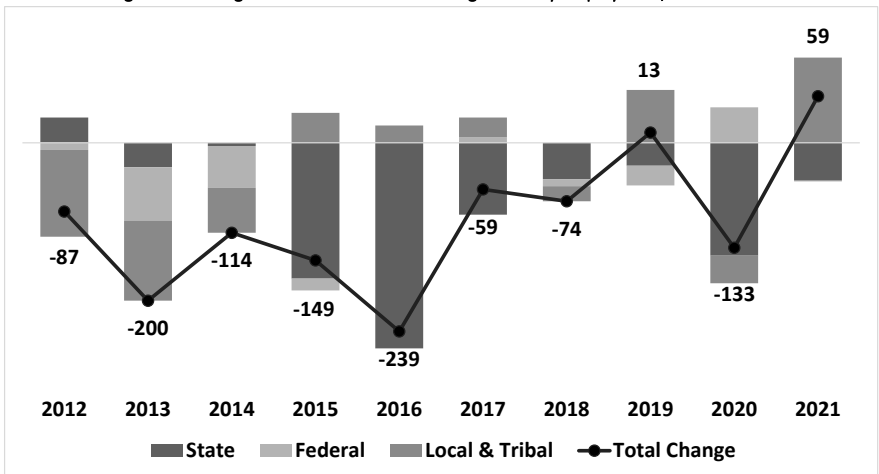
	Average Employment 2020	Average Employment 2021	% Change	Total Earnings 2020	Total Earnings 2021	% Change
All Other Services	574	578	0.7%	\$32,850,079	\$34,039,800	3.6%
Professional, Scientific, and Tech.	448	481	7.4%	\$26,039,410	\$29,455,398	13.1%
Membership Organizations	478	438	-8.4%	\$23,494,423	\$22,543,376	-4.1%
Administrative Services	285	303	6.3%	\$12,211,182	\$11,755,117	-3.7%
<b>Total Service Providing</b>	<b>7,406</b>	<b>7790</b>	<b>5.1%</b>	<b>\$333,096,951</b>	<b>\$363,905,823</b>	<b>9.3%</b>
<b>Total Private Sector</b>	<b>9,270</b>	<b>9,799</b>	<b>5.7%</b>	<b>\$497,070,684</b>	<b>\$533,449,564</b>	<b>7.3%</b>
State Government	3,528	3,480	-1.4%	\$225,809,413	\$234,980,721	4.1%
Local and Tribal Government	2,349	2,457	4.6%	\$143,803,622	\$148,670,577	3.4%
Federal Civilian Government	710	709	-0.1%	\$69,526,412	\$72,180,745	3.8%
<b>Total Government</b>	<b>6,587</b>	<b>6,646</b>	<b>0.9%</b>	<b>\$439,139,447</b>	<b>\$452,832,043</b>	<b>3.1%</b>
<b>Total Industries</b>	<b>15,856</b>	<b>16,445</b>	<b>3.7%</b>	<b>\$936,210,131</b>	<b>\$986,281,608</b>	<b>5.4%</b>

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 uniformed Coast Guard personnel stationed in Juneau.

## Government Employment

Government jobs in Juneau had a net increase of 59 in 2021. State jobs decreased for the ninth consecutive year but saw a smaller decrease than in 2020. Local and tribal government jobs remained unchanged from 2020. The net increase in 2021 was due to a significant increase in local and tribal government jobs. Federal government jobs increased by 45 in 2020, due to data collection for the Decennial U.S. Census, and only decreased by one job in 2021.

Figure 11: Change in Total Government Average Monthly Employment, 2012-2021

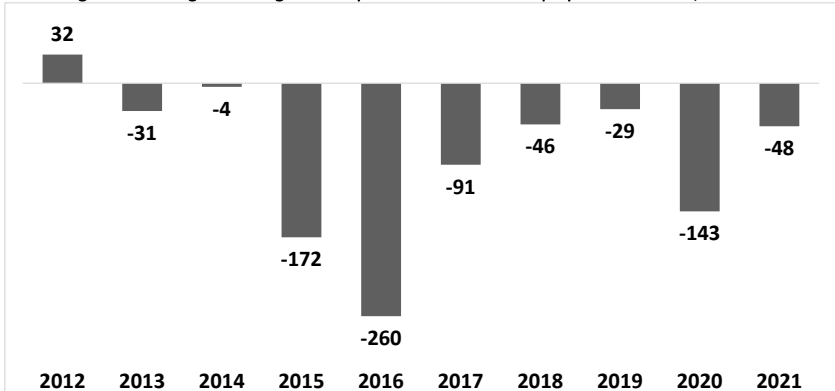


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages

## State Government Employment

Juneau's state government average monthly employment decreased from 3,528 to 3,480 in 2021. The loss of 48 jobs is the fifth most jobs lost in a single year in the last 20 years. Since 2013, a total of 824 state jobs have left Juneau.

Figure 12: Change in Average Monthly State Government Employment in Juneau, 2012 – 2021



Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Average annual state employment includes Juneau employees in the Executive branch, legislative branch, judicial branch and University of Alaska Southeast

The count of executive branch employees is taken annually on June 30. The most recent count of 2,909, taken on June 30, 2021, is 169 employees below the 2020 count. The four departments that did not see a decrease in positions were the Departments of Law, Military and Veterans Affairs, Natural Resources, and Health and Social Services. The largest decrease was in the Office of the Governor, which had a 30.2% decline since 2020 (-38 employees).

Figure 13: Juneau Area Executive Branch Employee Count by Department on June 30, 2017 - 2021

	June 2017	June 2018	June 2019	June 2020	June 2021	% Change
Transportation & Public Facilities	650	615	619	582	556	-4.5%
Health & Social Services	485	480	483	468	474	1.3%
Administration	392	462	463	428	404	-5.6%
Fish & Game	301	284	289	289	278	-3.8%
Labor & Workforce Dev	232	208	206	259	241	-6.9%
Education & Early Dev	199	203	193	187	161	-13.9%
Commerce, Community & Economic Dev	174	170	169	159	149	-6.3%
Revenue	194	182	186	198	175	-11.6%
Corrections	126	128	122	131	130	-0.8%
Environmental Conservation	117	107	99	98	96	-2.0%
Office of the Governor	83	90	120	126	88	-30.2%
Law	67	60	65	70	74	5.7%
Public Safety	42	39	38	43	39	-9.3%
Natural Resources	48	47	39	34	38	11.8%

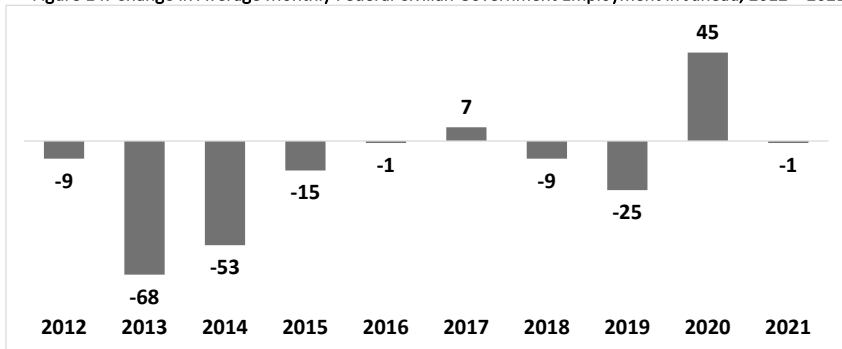
	June 2017	June 2018	June 2019	June 2020	June 2021	% Change
Military and Veterans Affairs	3	6	6	6	6	0.0%
<b>Total Executive Branch</b>	<b>3,115</b>	<b>3,073</b>	<b>3092</b>	<b>3078</b>	<b>2909</b>	<b>-5.5%</b>
<b>Change from prior year</b>	<b>-132</b>	<b>-42</b>	<b>19</b>	<b>-14</b>	<b>-169</b>	

Source: Alaska Department of Administration, Employee Planning and Information Center

### Federal Government Employment

Juneau saw a rare increase in federal government jobs in 2020. Most of this job increase was due to data collection for the Decennial Census and will likely be temporary. This increase was maintained in 2021, with the Quarterly Census of Employment and Wages showing a decline of only 1 federal job. Forest Service and NOAA employees constitute just over half of Juneau's total federal employment.

Figure 14: Change in Average Monthly Federal Civilian Government Employment in Juneau, 2012 – 2021



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

A different set of data indicates that government jobs in Juneau had no change (0%) in 2021 compared to 2020. A decline of 20 jobs (-28.2%) in the "other" category (likely associated with the disappearance of temporary Decennial Census jobs) were accompanied by modest increases in the Forest Service, NOAA, FAA, Coast Guard, and TSA. Highway Administration saw a decrease of 1 job.

Figure 15: Average Monthly Federal Government Civilian Employment in Juneau by Department, 2017 –2021

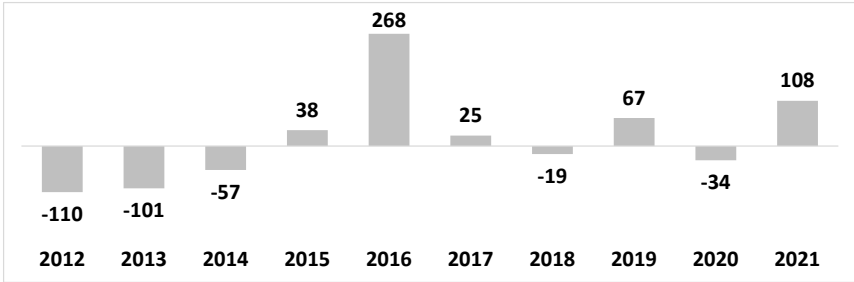
	2017	2018	2019	2020	2021	Percent Change 2020 to 2021
Forest Service	185	169	163	168	170	1.2%
NOAA	179	188	185	196	205	4.6%
Fish and Wildlife	6	6	5	3	3	0.0%
Indian Affairs	11	11	11	9	9	0.0%
Highway Administration	15	14	13	15	14	-6.7%
FAA	61	62	60	61	65	6.6%
Coast Guard	79	77	73	75	80	6.7%
TSA	55	59	46	46	47	2.2%
Postal Service	64	59	64	66	66	0.0%
All Other	44	45	42	71	51	-28.2%
<b>Total</b>	<b>699</b>	<b>690</b>	<b>665</b>	<b>710</b>	<b>710</b>	<b>0.0%</b>

Source: Alaska Department of Labor and Workforce Development, Research and Analysis; \*Note: US Coast Guard employment does not include approximately 245 active-duty personnel

### Local and Tribal Government Employment

Local and tribal government employment saw a large increase of 108 jobs (4.6%) in 2021 after mixed changes in the past few years. The increase of local jobs in 2021 is the largest since 2016.

Figure 16: Change in Average Monthly Local and Tribal Government Employment in Juneau, 2012 – 2021

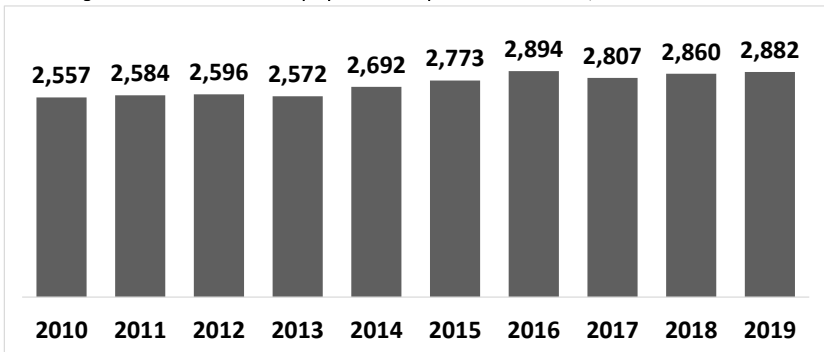


Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages. Note: Local Government includes such enterprises as the Juneau Airport, Docks and Harbors, and Bartlett Regional Hospital

### Self-employed/Sole Proprietors and Independent Contractors

An estimate of the number of self-employed/sole proprietors and independent contractors in Juneau can be made by using the number of businesses with no employees (known as non-employer establishments). Juneau's self-employed/sole proprietor sector experienced steady growth for three years from 2013 through 2016, and then fell in 2017. The sector resumed growth in 2018, increasing by 1.9% from 2017 to 2018 and 0.77% from 2018 to 2019, reaching near 2016 levels. The US Census Bureau has delayed the release of the 2019 non-employer statistics until further notice.

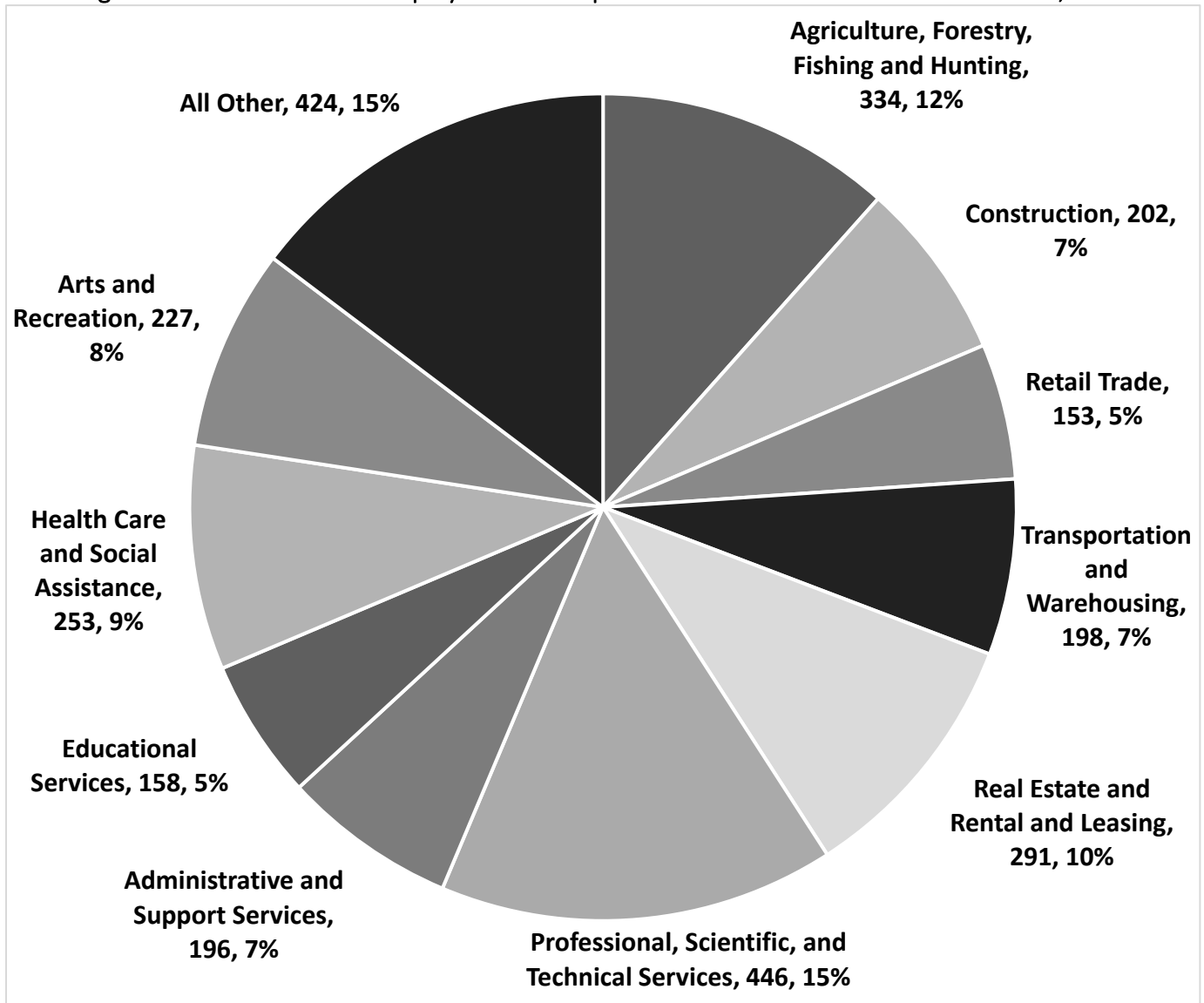
Figure 17: Number of Self-employed and Independent Contractors, Juneau 2010 to 2019



Source: US Census Bureau, 2019 Non-employer Statistics. Note: 2019 is the most current year for which data is available.

The largest self-employed sector is Professional, Scientific, and Technical Services, with 15% of all self-employed workers. It is tied with the "Other" category, which includes a variety of sectors that fall outside the bounds of the ones listed. The third largest self-employed sector is Agriculture, Forestry, Fishing and Hunting (12%), followed by Real Estate & Rental and Leasing (10%). Commercial fishing operations are generally counted as self-employed or independent contractors.

Figure 18: Number of Self-employed and Independent Contractors and Percent of Total, 2019



Source: US Census Bureau, 2019 Non-employer Statistics. Note: 2019 is the most current year for which data is available.

Figure 19: Number of Self-Employed and Independent Contractors, Industry Receipts and Average Revenue for Select Industry Sectors, Juneau 2019

	Number of Establishments	Receipts	Average Revenue per Establishment
Real Estate and Rental and Leasing	291	\$37,681,000	\$129,488
Professional, Scientific, and Technical Services	446	\$21,598,000	\$48,426
Construction	202	\$19,670,000	\$97,376
Agriculture, Forestry, Fishing and Hunting	334	\$19,502,000	\$58,389
Health Care and Social Assistance	253	\$11,803,000	\$46,652
Transportation and Warehousing	198	\$6,668,000	\$33,677
Other services (except public administration)	168	\$6,535,000	\$38,899
Administrative and Support Services	196	\$5,163,000	\$26,342
Retail Trade	153	\$4,820,000	\$31,503
Arts and Recreation	227	\$4,670,000	\$20,573
Accommodation and Food Services	89	\$2,779,000	\$31,225
Manufacturing	59	\$2,667,000	\$45,203
Educational Services	158	\$2,234,000	\$14,139

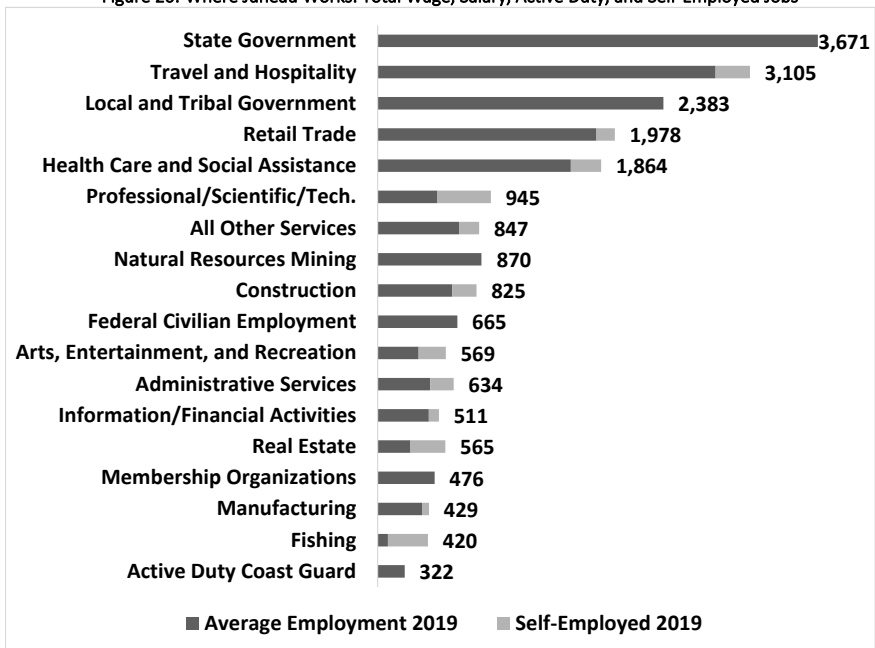
Finance and Insurance	53	\$1,159,000	\$21,868
Information	31	\$538,000	\$17,355
Mining, quarrying, and oil and gas extraction	7	\$413,000	\$59,000
Wholesale Trade	17	\$220,000	\$12,941
<b>Total for all sectors</b>	<b>2,882</b>	<b>\$148,120,000</b>	<b>\$51,395</b>

Source: US Census Bureau, 2018 Non-employer Statistics. Note: 2019 is the most current year for which data is available.

## 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 wage, salary, active duty and self-employed job count has been combined in Figure 19. State government employment, Juneau's largest employer, provides 21% of all wage and salary jobs, but is only 18% of Juneau's 20,900 total jobs. Juneau's five largest industry sectors provide just over 60% of all jobs in Juneau: state government (18%), travel and hospitality (14%), local and tribal government (11%), retail trade (10%), and health care and social assistance (9%).

Figure 20: Where Juneau Works: Total Wage, Salary, Active Duty, and Self-Employed Jobs



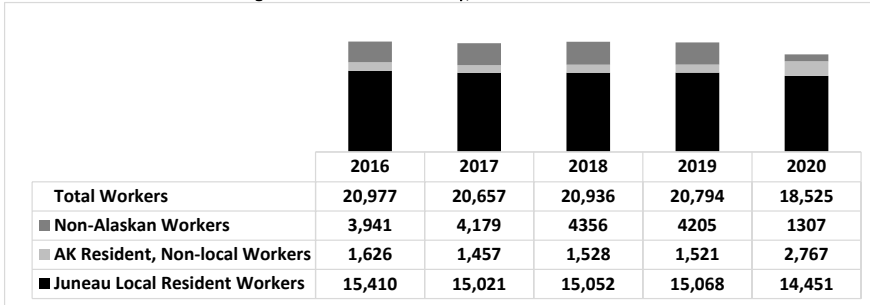
Source: Alaska Department of Labor and Workforce Development, 2019 Quarterly Census of Employment and Wages; US Census Bureau, 2019 Non-Employer Statistics

## Non-resident Employment

In 2020 (the most current year for which data is available), Juneau's cumulative workforce (the total number of people who worked over the course of a year) was 18,525 workers. This is a decrease of 2,269 workers (-10.9%) from 2019. The loss is primarily due to a 68.9% decrease in non-Alaskan workers. Approximately 78% of

cumulative workers are residents of Juneau, 7.1% are Alaskan but not local, and 19.1% are out of state workers.

Figure 21: Worker Residency, Juneau 2016 -2020



Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, "Nonresidents Working in Alaska: 2020" Note: Worker count shows total cumulative workers. Note: 2020 is the most current year for which data is available.

Non-resident workers are mostly employed in Juneau's private sector, which is 20.1% non-local hire. Juneau's local government sector is 7% non-local hire and state government is 4.9% non-local hire. In Southeast Alaska, industries with high numbers of non-resident workers include manufacturing (including seafood processing) at 63.7%, the mining industry (including Greens Creek and Kensington) at 51.4%, and agriculture, forestry, fishing and hunting at 40.6%.

Figure 22: Resident and Non-Resident Workers and Earnings by Place of Work, 2020

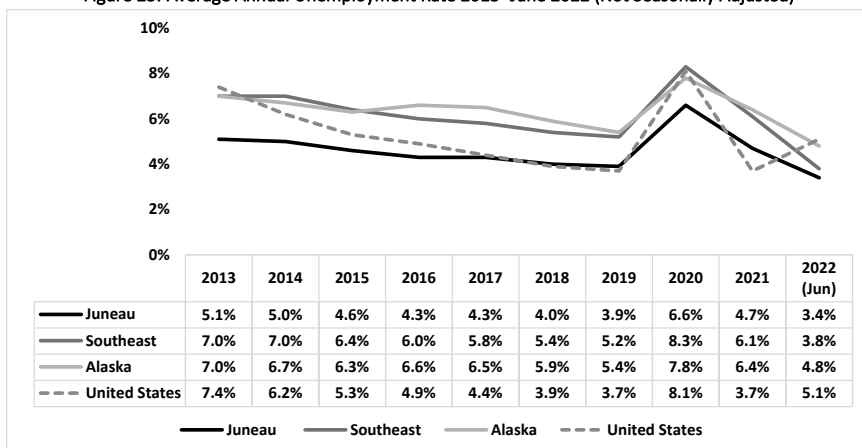
	Workers				Per Capita Average Annual Wages		
	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers	% Out of State Workers	Juneau Resident Workers	Other AK Resident Workers	Out of State Workers
State Government	3,441	224	190	4.9%	\$56,466	\$45,089	\$34,211
Local and Tribal Government	2,543	66	196	7.0%	\$54,385	\$42,424	\$29,592
Private Sector	8,467	1,017	2,381	20.1%	\$41,703	\$55,064	\$37,379
<b>All Sectors</b>	<b>14,451</b>	<b>1,307</b>	<b>2,767</b>	<b>14.9%</b>	<b>\$47,450</b>	<b>\$52,716</b>	<b>\$36,610</b>

Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Resident Hire, Historical Documents, " Nonresidents Working in Alaska: 2020". Note: 2020 is the most current year for which data is available.

## Unemployment

Juneau's unadjusted unemployment rate for 2021 was 4.7%. This is 1.9 percentage points down from the 2020 average, returning to levels seen in 2015-2019, before the COVID-19 pandemic. Juneau's unadjusted unemployment rate in 2022 (through June) dropped to 3.4%, the lowest in the past nine years. Juneau's unemployment rates remain below the rest of Southeast, Alaska, and the nation.

Figure 23: Average Annual Unemployment Rate 2013 -June 2022 (Not Seasonally Adjusted)

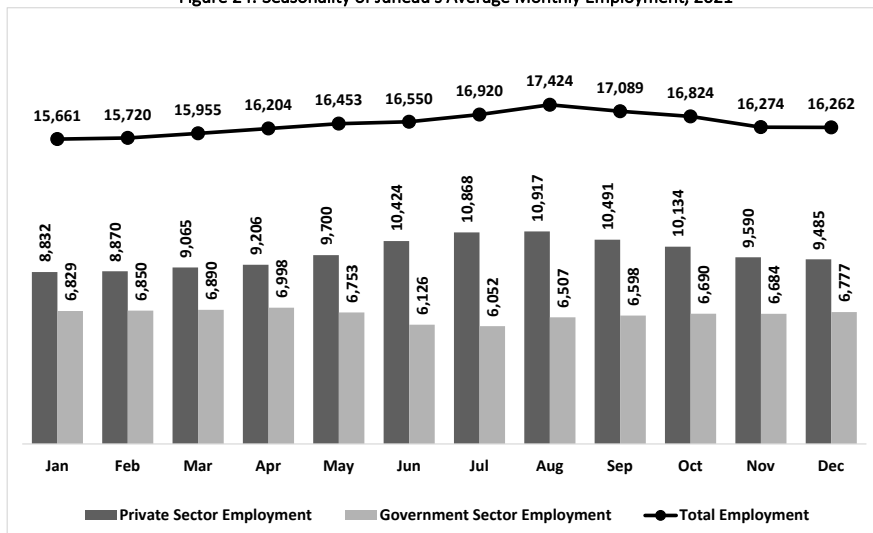


Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, Employment and Employer Data

### Seasonality of Employment

Juneau's average monthly employment has a pronounced seasonal variability. Government sector employment is down in the summer when the school district and the university are on summer break. Private sector employment increases in the summer with hiring for Juneau's tourism, construction, and manufacturing sectors. In 2021, Juneau saw the return of its increasing summer employment. Peak employment was reached in August, coinciding with the return of large cruise ships in late July.

Figure 24: Seasonality of Juneau's Average Monthly Employment, 2021



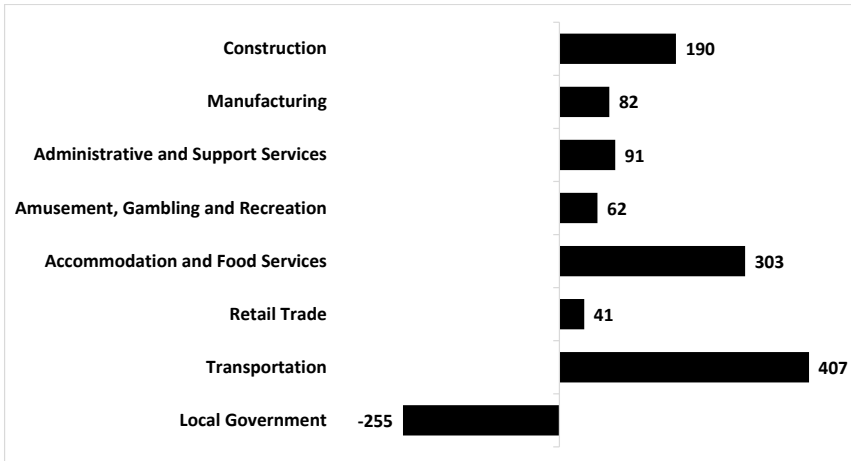
Source: Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages



Local government was the only sector to show a decrease in summer employment (May-October) in 2021. Local government consistently has higher employment in the winter months (January to April and November to December) due to the seasonality of school activity. The sectors that normally show large summer employment increases rely on the tourism industry (Food and Accommodation, Transportation, and Retail Trade). Construction, Accommodation and Food Services, and Transportation had the biggest increases in summer employment in 2021.

Figure 25 shows the sectors of Juneau's economy that normally have a substantial summer increase or decrease.

Figure 25: Increase or Decrease in Summer Average Monthly Employment over Winter for Select Sectors, 2021



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



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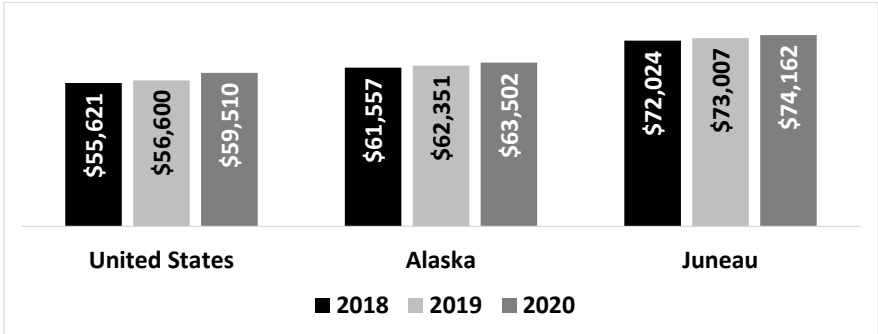
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## Per Capita Personal Income and Household Earnings

Per capita personal income is calculated as the total personal income of all residents divided by the total population. It is an indicator of the economic well-being of the community. In 2020, Juneau's per capita personal income of \$74,162 was 115% of the state average and 125% of the national average, indicating a relatively affluent community.

Figure 26: Per Capita Personal Income Comparison, 2018 -2020 (In 2020 Inflation-adjusted Dollars)



Source: U.S. Bureau of Economic Analysis, Regional Data, Local Area Personal Income. Note: 2020 is the most current year for which data is available.

Regionally, Juneau saw the highest per capita income in 2020, followed closely by Petersburg and Sitka. Juneau remained higher than Anchorage and Fairbanks, as well as the state and national average.

Figure 27: Per Capita Personal Income for Selected Boroughs, States and U.S., 2020

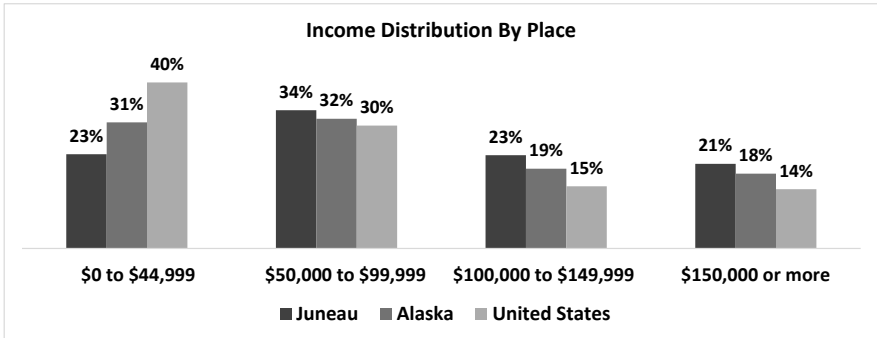


Source: U.S. Bureau of Economic Analysis, Regional Data, Local Area Personal Income. Note: 2020 is the most current year for which data is available.

## Income Distribution, Poverty and Income Inequality

In Juneau, 44% of households earn more than \$100,000 per year, while only 37% of all Alaskan households and 29% of all U.S. households earn above this threshold. In contrast, 40% of all households in the United States earn less than \$50,000, compared to 31% in Alaska and only 23% in Juneau.

Figure 28: Percent of Households by Income Bracket, 2015 -2019, 5-Year Average

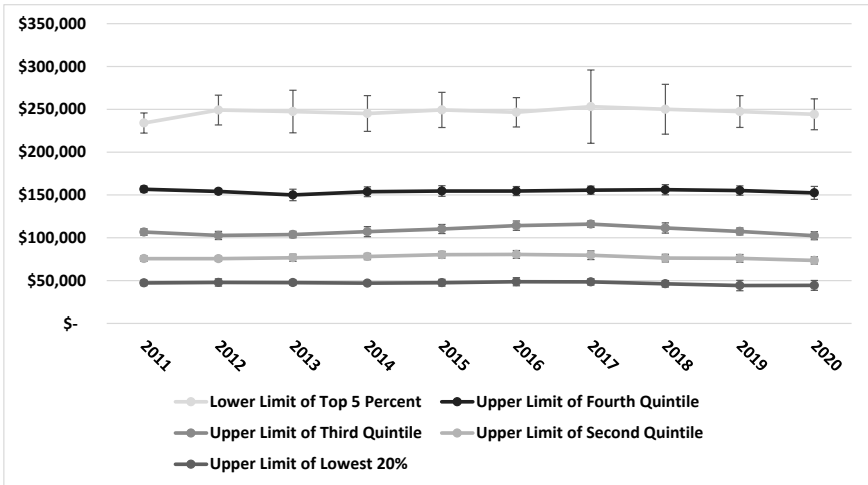


Source: U.S. Census Bureau, 2015-2019 American Community Survey 5-Year Estimates DP03 Dataset, 2019 Inflation Adjusted Dollars.

Note: Dataset 2015-2019 is the most current estimate available.

The following figure shows the income quartiles of Juneau households. The area below each line holds 20% of Juneau's households except for the top line, which has 15% between it and the line below it. Household income for most Juneau households has decreased slightly. The upper limit of the bottom 20% of Juneau households has decreased by 6.1% between 2011 and 2020. The upper limits for the next three quartiles of households have also decreased by 2.8%, 4.0%, and 2.7% over the last 10 years. Since the upper limit of the top 20% of households would be the highest earning household in Juneau, the top line separates the upper 5% of households and the rest of the top quintile of households. That line has increased by 4.4% over the last 10 years.

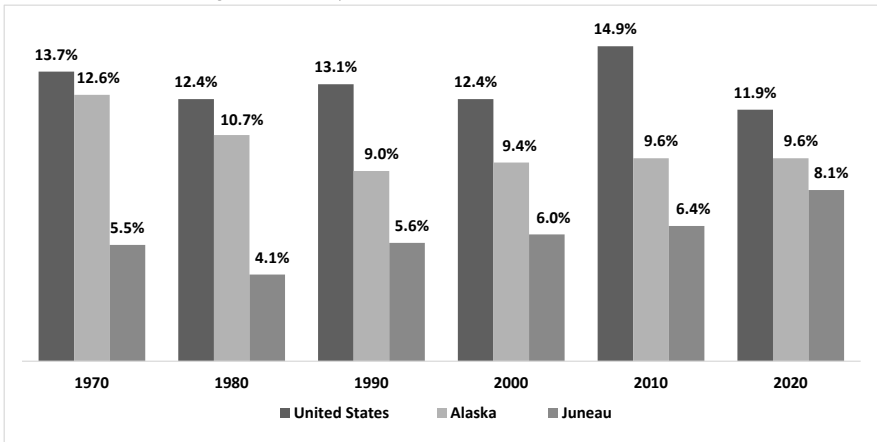
Figure 29: Juneau Household Income Quintile Upper Limits, Adjusted for Inflation, 2011-2020



Source: U.S. Census Bureau, 2016-2020 American Community Survey 5-Year Estimates

Despite Juneau’s higher affluent population, poverty has been increasing in the past decade. Juneau’s 2016-2020 five-year average estimate (the most recent period for which data is available) shows a poverty rate of 8.1%. This is up 0.4 percentage points from the 2015-2019 estimate and remains higher than previous estimates over the last decade.

Figure 30: Poverty Rates in Juneau, Alaska and the United States

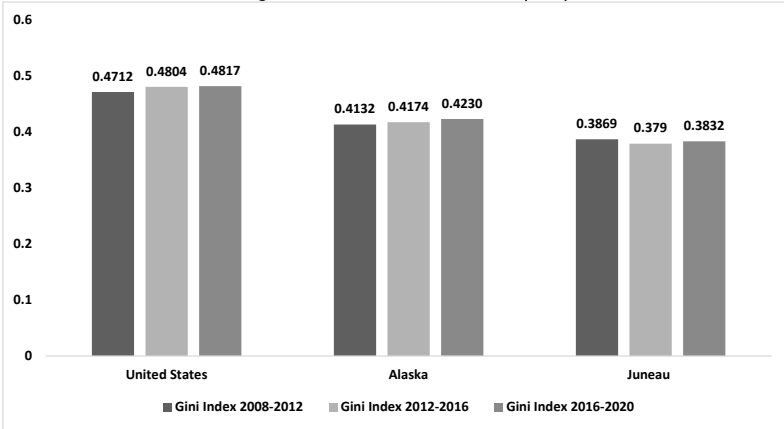


Source: U.S. Census Bureau, Decennial Census 1970 – 2000, 2006-2010 and 2016-2020 American Community Survey 5-Year Estimates  
 Note: Dataset 2016-2020 is the most current estimate available.

Income inequality is measured by the distribution of wealth across a population. The most common way economists measure income inequality is using the Gini coefficient (or ratio), a number between 0 (perfect equality) and 1 (maximum inequality). Thus, the lower the Gini coefficient score, the more fairly distributed the income. The Gini coefficient for household income in the United

States is 0.48. Alaska’s Gini coefficient is 0.43, one of the lowest in score among all states. Juneau has an average Gini coefficient of 0.38 for the years 2016 to 2020. One reason for greater income equality in Juneau may be the predominance of government employment and other middle-income positions.

Figure 31: Gini Index of Income Inequality

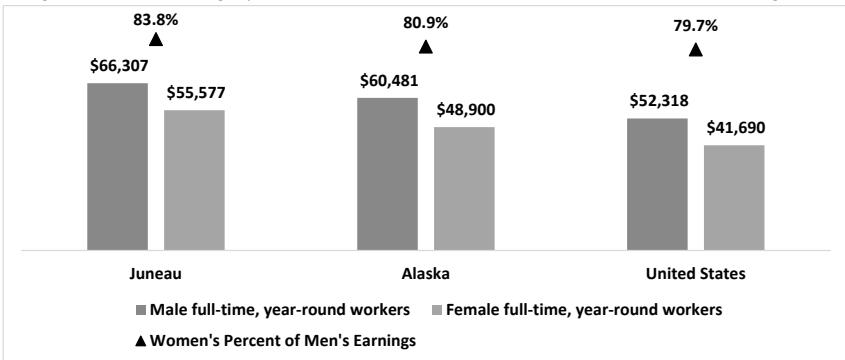


Source: U.S. Census Bureau, 2008-2012, 2012-2016, and 2016-2020 American Community Survey 5-Year Estimates, B19083 Data Set.  
 Note: Dataset 2016-2020 is the most current estimate available.

## Gender Compensation

Both men and women working full-time, year-round jobs in Juneau, earn slightly more on average than their counterparts in Alaska and the United States. The ratio of women’s earnings to men is higher in Juneau than the rest of the state and the nation, meaning there is slightly more gender equality in income compared to Alaska and the United States. The median earnings for female full-time, year-round workers in Juneau (\$55,577) is 83.8% of male full-time, year-round earnings (\$66,307) according to the census bureau’s 2016-2020 five-year estimate (the most current year for which data is available).

Figure 32: Median Earnings by Gender for Full-Time, Year-Round Workers, 2016-2020, 5-Year Average



Source: U.S. Census Bureau, DP03 dataset: Selected Economic Characteristics, 2016-2020 ACS 5-Year Estimate. Note: Dataset 2016-2020 is the most current estimate available.

One significant factor in the difference in pay for men and women in Juneau and Alaska is the current difference in types of jobs predominately held by men versus women in the workforce. Male-dominated industries in Alaska tend to be in extraction, construction and building trades, which have higher wages than female-dominated occupations which tend to be in lower wage service and care-providing sectors. As can be seen in Figure 33, Juneau’s mid-level office and administrative support jobs (mostly in government) have significantly less gender bias.

**Figure 33: Median Earnings by Gender for the Civilian Population 16 years and Over for Select Occupations**

	Women's Earnings as a% of Men's Juneau	Women's Earnings as a% of Men's Alaska	Women's Earnings as a% of Men's United States
Personal care and service	89	99	78
Law enforcement workers including supervisors	101	76	78
Health technologists and technicians	86	72	84
Arts, design, entertainment, sports, and media occupations	96	66	76
Healthcare support occupations	78	102	90
Education, legal, community service, arts, and media occupations	98	80	78
Office and administrative support occupations	92	89	87
Sales and office occupations	90	79	73
Architecture and engineering occupations	88	76	84
Farming, fishing, and forestry occupations	83	63	64
Healthcare practitioners and technical occupations	81	72	70
Health diagnosing and treating practitioners and other technical occupations	42	63	63
Building and grounds cleaning and maintenance occupations	51	74	65

**Source:** U.S. Census Bureau, B24012 dataset: Sex by Occupation and Median Earnings in the Past 12 Months (in 2020 inflation adjusted dollars) for the Civilian Employed Population 16 Years and Over, 2016-2020 ACS 5-Year Estimate. **Note:** Dataset 2016-2020 is the most current estimate available.



## Southeast Alaska Employment and Wages

Southeast Alaska employment increased by 4.83% (1,562 jobs) in 2020. The private sector saw a 7.27% rise in employment (1,489 jobs) while total government employment saw a rise of 0.62% (74 jobs). The sectors that saw decreases were State Government (-0.79%), Federal Civilian Government (-3.43%), Financial Services (-1.54%), and Professional, Tech and Management Services (-3.76%). The largest increases in employment were in Manufacturing (29.09%) and Leisure and Hospitality (20.39%). These two sectors also had the largest jump in earnings from 2020 to 2021, with increases of 41.37% and 33.45% respectively. Only two sectors had drops in earnings in 2021: Professional, Tech and Management Services (-3.17%) and Administrative Services (-3.84%). The earnings for these two sectors were not majorly disrupted by the pandemic in 2020. Regionwide, earnings across all sectors were up by 7.22% in 2021.

**Figure 34: Select Southeast Alaska Industry Sector Employment and Earnings, 2019 to 2021**

	Average Employment 2019	Average Employment 2020	Average Employment 2021	Percent Change 2020 to 2021	Total Earnings 2019	Total Earnings 2020	Total Earnings 2021	Percent Change 2020 to 2021
Local and Tribal Government	6,257	5,989	6,147	2.64%	\$311,817,368	\$322,591,498	\$334,172,156	3.59%
State Government	4,705	4,438	4,403	-0.79%	\$284,002,032	\$278,894,969	\$287,619,776	3.13%
Federal Civilian Government	1,392	1,429	1,380	-3.43%	\$124,300,319	\$126,435,407	\$128,095,788	1.31%
<b>Total Government</b>	<b>12,354</b>	<b>11,856</b>	<b>11,930</b>	<b>0.62%</b>	<b>\$720,119,719</b>	<b>\$727,921,874</b>	<b>\$749,887,720</b>	<b>3.02%</b>
Manufacturing	1,830	1,554	2,006	29.09%	\$85,074,590	\$75,194,473	\$106,299,046	41.37%
Construction	1,332	1,348	1,417	5.12%	\$92,424,631	\$93,148,268	\$100,357,128	7.74%
Natural Resources and Mining	1,359	1,223	1,255	2.62%	\$119,061,411	\$124,280,198	\$125,415,637	0.91%
<b>Total Goods Producing</b>	<b>4,521</b>	<b>4,125</b>	<b>4,680</b>	<b>13.45%</b>	<b>\$296,560,631</b>	<b>\$292,622,939</b>	<b>\$332,071,811</b>	<b>13.48%</b>
Retail Trade	4,217	3,561	3,679	3.31%	\$128,161,274	\$115,498,860	\$121,675,470	5.35%
Leisure and Hospitality	4,344	2,698	3,248	20.39%	\$108,874,426	\$69,448,276	\$92,681,706	33.45%
Health Care and Social Services	3,989	3,849	3,926	2.00%	\$211,463,440	\$219,744,316	\$234,289,376	6.62%
Transportation	2,910	1,747	1,981	13.39%	\$144,844,132	\$94,357,429	\$109,707,983	16.27%
Financial Services	1,071	1,038	1,022	-1.54%	\$54,349,824	\$57,840,241	\$62,384,615	7.86%
Professional, Tech and Mgmt Services	898	904	870	-3.76%	\$53,852,581	\$56,103,865	\$54,326,758	-3.17%
Administrative Services	724	598	604	1.00%	\$24,636,753	\$23,190,258	\$22,299,942	-3.84%
<b>Total Service Providing</b>	<b>20,426</b>	<b>16,366</b>	<b>17,298</b>	<b>5.69%</b>	<b>\$821,050,594</b>	<b>\$723,943,932</b>	<b>\$788,545,680</b>	<b>8.92%</b>
<b>Total Private Sector</b>	<b>24,947</b>	<b>20,490</b>	<b>21,979</b>	<b>7.27%</b>	<b>\$1,117,611,226</b>	<b>\$1,016,566,871</b>	<b>\$1,120,617,488</b>	<b>10.24%</b>
<b>Total</b>	<b>37,301</b>	<b>32,346</b>	<b>33,908</b>	<b>4.83%</b>	<b>\$1,837,730,945</b>	<b>\$1,744,488,746</b>	<b>\$1,870,505,209</b>	<b>7.22%</b>

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

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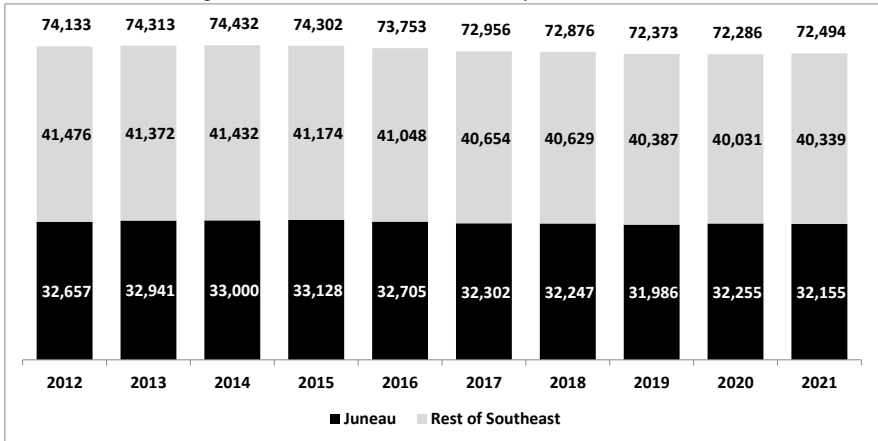
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## Demographics

### Juneau Population Trends

Juneau's population peaked in 2015, slowly and steadily decreasing until experiencing an increase of 169 individuals in 2020. The population decreased by 100 individuals in 2021, continuing the overall trend of slow decline. Despite the decline since 2015, Juneau's population has increased overall by 880 individuals since the 2010 U.S. Census. Southeast Alaska's population excluding Juneau increased by 308 individuals in 2021, and Southeast Alaska including Juneau saw a net population increase of 208 individuals.

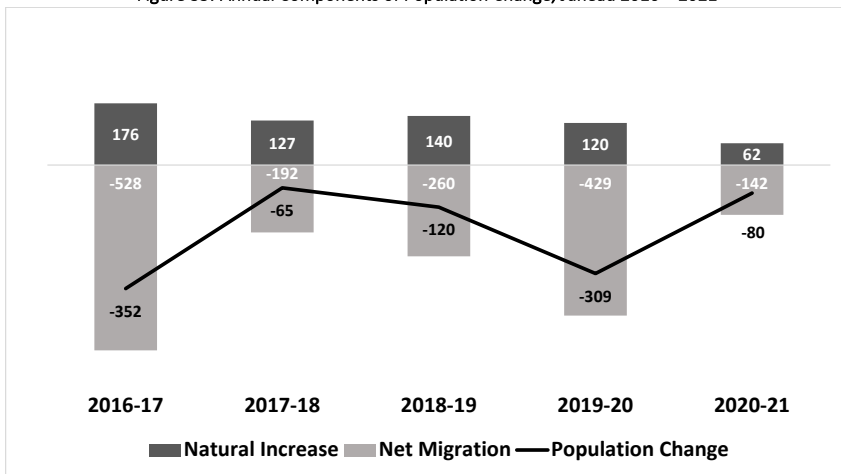
Figure 34: Juneau and Southeast Alaska Population, 2012 – 2021



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 2021, out-migration has surpassed the natural increase. However, the net population loss in the most recent period was notably less than previous years.

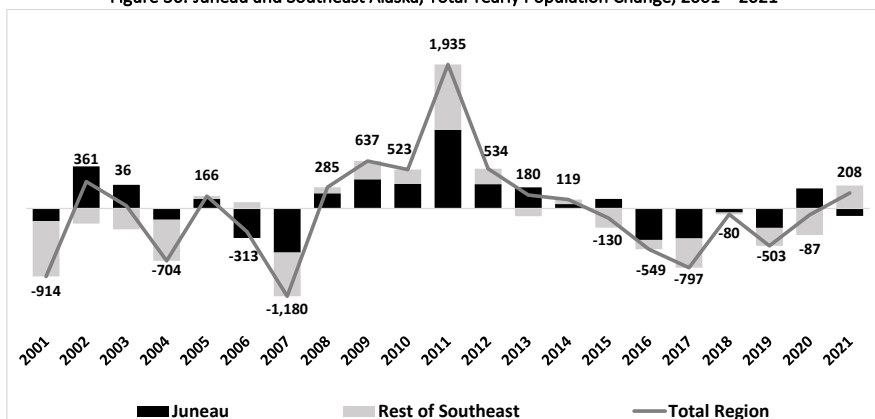
Figure 35: Annual Components of Population Change, Juneau 2016 – 2021



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

In 12 of the past 20 years, Juneau experienced population growth. For the rest of Southeast, this was the case in only nine of the past 20 years. In the ten years leading up to the recession of 2007, there were numerous years where the Juneau population increased while the rest of Southeast experienced declined. During this recession, this trend changed as both Juneau and the rest of Southeast experienced population growth for the next five years. In 2015, Juneau and the rest of Southeast returned to its pre-recession trend of declining population. Juneau’s population experienced growth in 2020 but again declined in 2021. The rest of Southeast experienced large population growth in 2021, only surpassed by the record population growth seen in 2011.

Figure 36: Juneau and Southeast Alaska, Total Yearly Population Change, 2001 – 2021

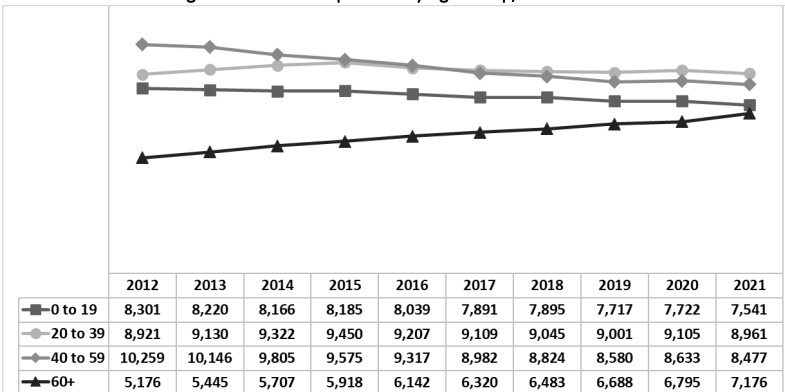


Source: Alaska Department of Labor and Workforce Development, Research & Analysis, Population Estimates

## Juneau Population by Age Group

In 2021, Juneau had 8,961 residents ages 20-39, the largest age demographic for the fifth year in a row, despite a 1.6% population decrease among the group from the previous year. The population 60 and over remained the fastest growing age demographic for the 20th consecutive year. Over the past decade, seniors went from 15% of Juneau's population in 2011 to 22 percent in 2021. The senior population is projected to be 24% of Juneau's population by 2025.

Figure 37: Juneau Population by Age Group, 2012 – 2021

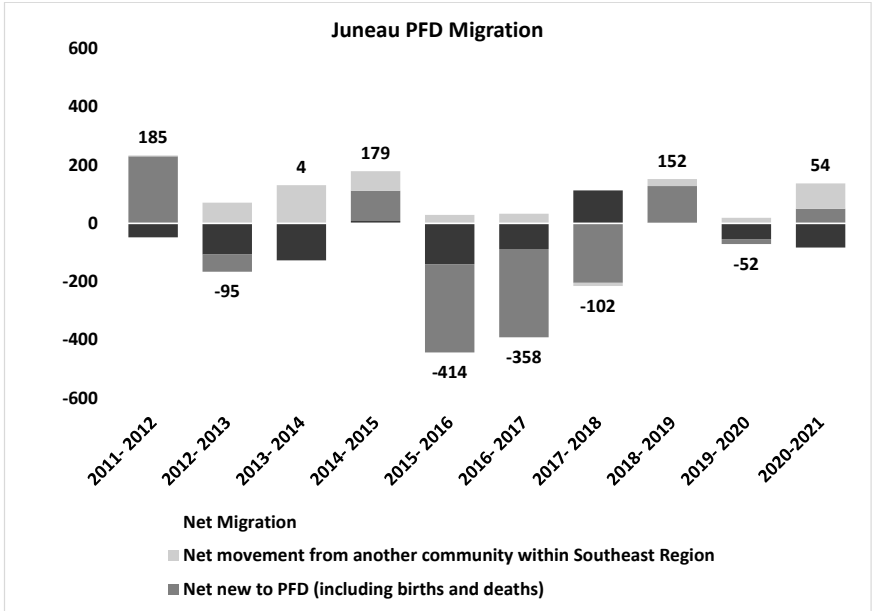


Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex" Dataset

## Juneau Migration and Resident Transiency

The Alaska Department of Labor and Workforce Development uses Permanent Fund Dividend (PFD) applications to track migration patterns between communities. Based on PFD filings, Juneau experienced a net gain of 54 people in 2021. This follows a net loss of 52 people in 2020. 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. Unlike previous years, where most people who moved to or from Juneau came from or went to locations outside of Alaska, there was more migration within Alaska in 2021. More people moved out of Juneau than in from all regions except for the Southeast and Southwest.

Figure 38: Total PFD-based Migration to and from Juneau, 2012 to 2021



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 39: PFD-based Migration to and from Juneau, 2020 to 2021

Region	Into Juneau	Out of Juneau	Net Migration
Anchorage and Mat-Su	148	227	-79
Gulf Coast	31	48	-17
Interior	34	41	-7
North	35	80	-45
Southwest	19	4	15
Haines Borough	14	18	-4
Hoonah-Angoon Census Area	56	36	20
Ketchikan Gateway Borough	42	30	12
Petersburg Borough	8	7	1
Prince of Wales - Hyder Census Area	51	20	31
Sitka, City and Borough	54	26	28
Skagway, Municipality	12	9	3
Wrangell, City and Borough	7	10	-3
Yakutat, City and Borough	0	1	-1
<b>Southeast Region Total</b>	<b>244</b>	<b>157</b>	<b>87</b>
Did not apply for PFD (including births and deaths)	2,008	1,958	50

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 40: Southeast Population by Borough and Census Designated Place 2017-2021

	July 2017	July 2018	July 2019	July 2020	July 2021	% change 2020-2021
<b>Haines Borough</b>	<b>2,458</b>	<b>2,484</b>	<b>2,533</b>	<b>2,080</b>	<b>2,614</b>	25.7%
Covenant Life CDP	69	51	61	25	73	192.0%
Excursion Inlet CDP	12	13	16	40	25	-37.5%
Haines CDP	1,735	1,743	1,776	1,657	1,818	9.7%
Lutak CDP	62	63	52	29	65	124.1%
Mosquito Lake CDP	266	290	279	120	294	145.0%
Mud Bay CDP	204	206	201	159	203	27.7%
Balance	110	118	148	50	136	172.0%
<b>Hoonah-Angoon Census Area</b>	<b>2,128</b>	<b>2,403</b>	<b>2,419</b>	<b>2,365</b>	<b>2,350</b>	-0.6%
Angoon City	406	388	381	357	360	0.8%
Elfin Cove CDP	14	36	35	24	32	33.3%
Game Creek CDP	18	23	23	23	19	-17.4%
Gustavus City	545	639	633	655	658	0.5%
Hoonah City	776	921	935	931	902	-3.1%
Klukwan CDP	93	95	96	87	88	1.1%
Pelican City	67	81	85	98	92	-6.1%
Tenakee Springs City	135	142	139	116	122	5.2%
Balance	74	77	91	72	75	4.2%
<b>Juneau City and Borough</b>	<b>32,302</b>	<b>32,664</b>	<b>32,544</b>	<b>32,255</b>	<b>32,155</b>	-0.3%
<b>Ketchikan Gateway Borough</b>	<b>13,782</b>	<b>14,026</b>	<b>14,004</b>	<b>13,948</b>	<b>13,895</b>	-0.4%
Ketchikan City	8,141	8,183	8,165	8,192	8,149	-0.5%
Saxman City	446	413	427	384	346	-9.9%
Balance	5,193	5,430	5,412	5,372	5,400	0.5%
<b>Petersburg Census Area</b>	<b>3,137</b>	<b>3,257</b>	<b>3,304</b>	<b>3,398</b>	<b>3,368</b>	-0.9%
Kupreanof City	21	16	19	21	21	9.5%
Petersburg City	2,885	2,948	2,938	2,963	3,043	-0.8%
Balance	230	233	299	319	333	-2.1%
<b>Prince of Wales-Hyder Census</b>	<b>6,380</b>	<b>6,251</b>	<b>5,980</b>	<b>5,915</b>	<b>5,753</b>	-0.4%
Coffman Cove City	198	168	124	124	127	47.2%
Craig City	1,087	1,095	1,065	1,045	1,036	-6.5%
Edna Bay CDP	43	43	29	30	25	60.0%
Hollis CDP	130	124	70	70	65	112.3%
Hydaburg City	378	398	399	399	380	-1.1%
Hyder CDP	89	80	61	57	48	-12.5%
Kake City	607	601	571	540	543	2.6%
Kasaan City	84	81	29	27	30	53.3%
Klawock City	833	777	740	723	720	-1.5%
Metlakatla CDP	1,424	1,398	1,505	1,485	1,454	-3.5%
Naukati Bay CDP	114	124	128	143	142	-3.5%
Point Baker CDP	13	13	13	12	12	-16.7%
Port Alexander City	53	55	62	65	78	-21.8%
Port Protection CDP	35	31	35	33	36	-2.8%
Thorne Bay City	534	524	497	532	476	-4.2%
Whale Pass CDP	43	57	86	91	86	-2.3%
Balance	717	682	566	539	495	-3.2%
<b>Sitka City and Borough</b>	<b>8,748</b>	<b>8,652</b>	<b>8,490</b>	<b>8,407</b>	<b>8,458</b>	-0.8%
<b>Skagway Municipality</b>	<b>1,089</b>	<b>1,088</b>	<b>1,160</b>	<b>1,182</b>	<b>1,240</b>	-3.0%
Skagway CDP	1,036	1,036	1,088	1,108	1,164	-3.0%
Balance	53	52	72	74	76	-2.6%
<b>Wrangell City and Borough</b>	<b>2,389</b>	<b>2,426</b>	<b>2,213</b>	<b>2,174</b>	<b>2,127</b>	-1.5%
<b>Yakutat City and Borough</b>	<b>543</b>	<b>523</b>	<b>573</b>	<b>602</b>	<b>662</b>	5.3%
<b>Southeast Total</b>	<b>72,956</b>	<b>72,876</b>	<b>73,250</b>	<b>73,084</b>	<b>72,286</b>	0.3%



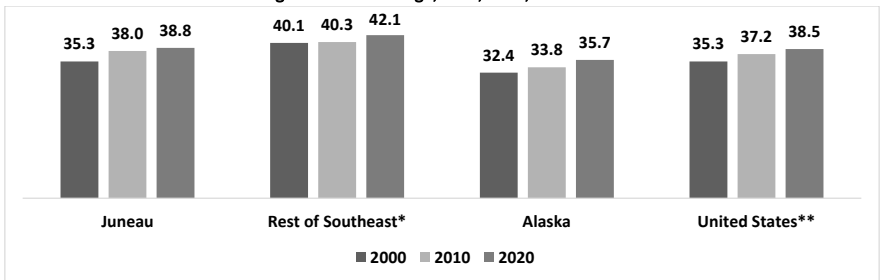
	July 2017	July 2018	July 2019	July 2020	July 2021	% change 2020-2021
Total excluding Juneau	40,654	40,629	40,586	40,540	40,031	0.8%

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 median age increased slightly from 38.0 to 38.8 over the previous decade. Juneau’s population is older than the state average but younger than the rest of Southeast, and slightly older than the nation’s average. The Southeast region exclusive of Juneau is significantly older than Juneau, the state of Alaska, and the nation.

Figure 41: Median Age, 2000, 2010, and 2020



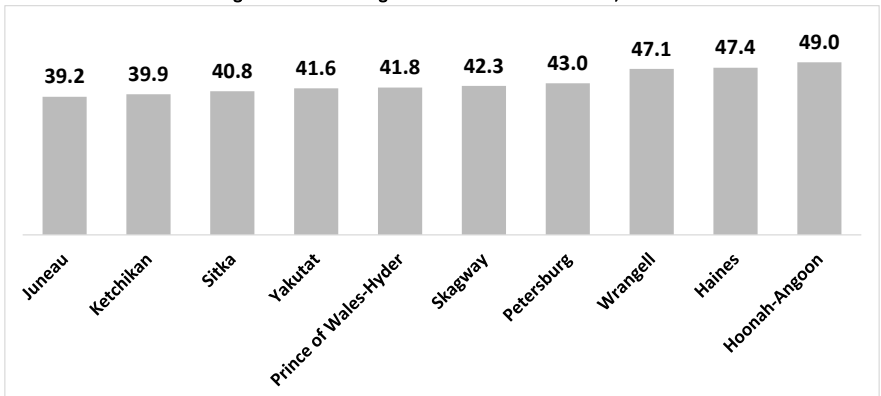
Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2021" Dataset; U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Single Year of Age and Sex for the United States, States, and Puerto Rico Commonwealth: April 1, 2010 to July 1, 2021

\*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, 2021.

Juneau has the youngest median age of all Southeast communities, followed closely by Ketchikan. Wrangell, Haines, and Hoonah-Angoon have the highest median age of all Alaskan communities.

Figure 42: Median Age for Southeast Communities, 2021

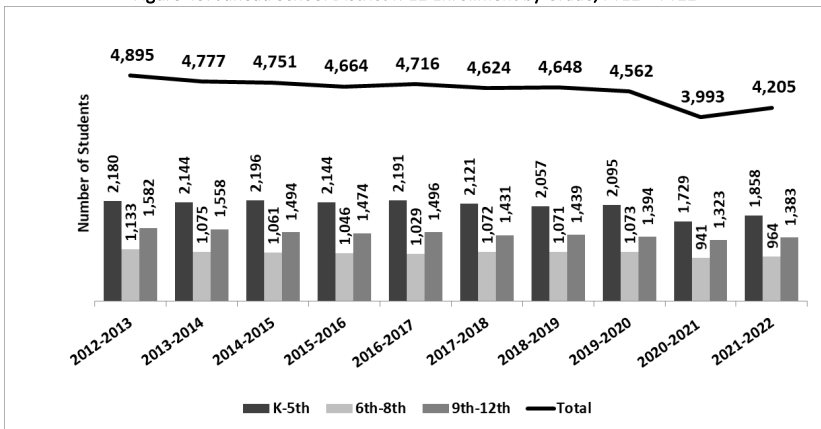


Source: Alaska Department of Labor and Workforce Development, Population Estimates, Economic Regions and Boroughs/Census Areas, "Age and Sex 2010-2021" Dataset

## Juneau School District Enrollment

Enrollment for K-12 in the Juneau School District for the 2021-2022 school year was 4,205 students, an increase of 212 students from the previous year. This is still 443 less enrolled students than the 2018-2019 school year. This enrollment total includes Homebridge students but does not include students enrolled in other homeschooling programs. Enrollment decreased significantly during the 2020-2021 academic year as the COVID-19 pandemic led to a transition from in-person to online schooling. As a result of this change and overall safety concerns, many parents switched their children to Homebridge or other homeschooling programs.

Figure 43: Juneau School District K-12 Enrollment by Grade, FY12 – FY22

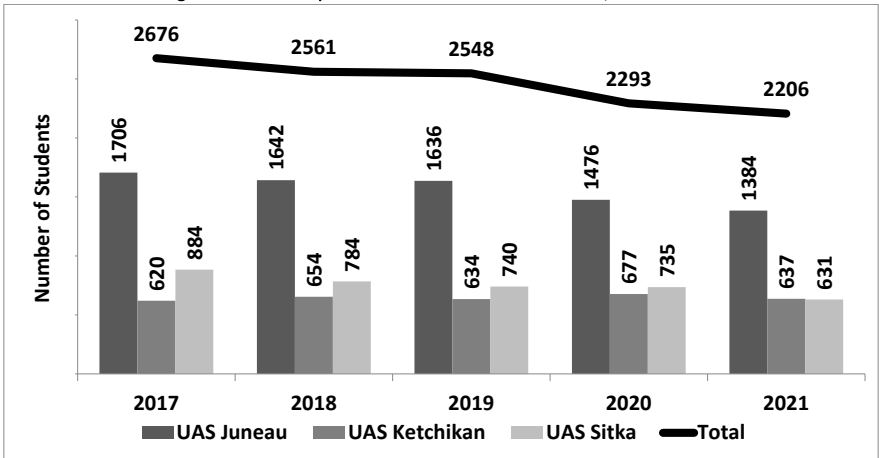


Source: Alaska Department of Education and Early Development Data Center, FY22 preliminary provided by Juneau School District

## University of Alaska Southeast Enrollment

Enrollment at the University of Alaska Southeast (UAS) was 2,206 students, 87 fewer enrollments (-3.8%) compared to the previous year. Fall enrollment was down at all three UAS campuses. The Sitka campus saw 104 fewer enrollments (-14.1%), the largest nominal drop since 2008. The Juneau campus had 92 fewer enrollments (-6.2%) compared to 2021. The Ketchikan campus saw 40 fewer enrollments (-5.9%) compared to the previous year. Note that many UAS students are enrolled at multiple campuses, meaning campus enrollments do not sum to the total enrollment.

Figure 44: University of Alaska Southeast Fall Enrollment, 2017 to 2021

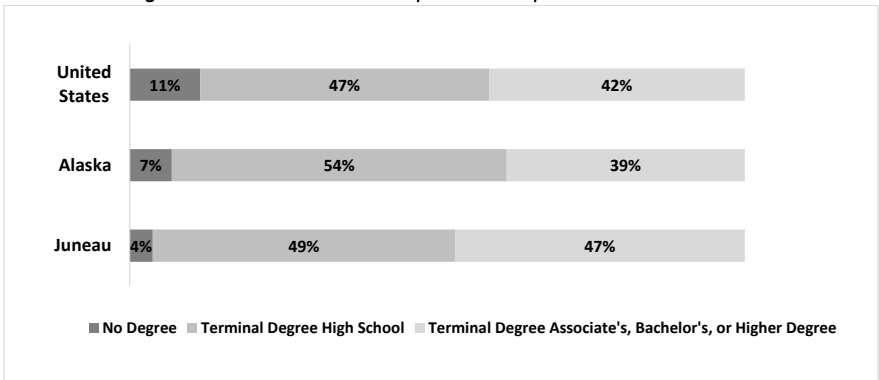


Source: University of Alaska Southeast; Note: Due to cross-registration, individual campus enrollments do not sum to total enrollment.

## Educational Attainment

Juneau has a more educated population than the state of Alaska and the nation. The 2016-2020 five-year Census Bureau estimate shows that 47 percent of Juneau’s population has earned an associate degree or higher. In comparison, only 39 percent of individuals in Alaska have earned a degree beyond high school. Only 4 percent of Juneau residents 25 and older do not hold a high school diploma, around half of the statewide five-year average and a third of the national five-year average.

Figure 45: Educational Attainment by Percent of Population 25 Years and Older



Source: U.S. Census Bureau, 2016 -2020 American Community Survey 5-Year Estimates, “Educational Attainment” S1501 Dataset.

Note: Dataset 2016-2020 is the most current estimate available.

A black and white photograph of construction workers on a roof. Several workers are visible, some wearing hard hats and safety harnesses, working together to lift or secure a large wooden beam. The background shows trees and a clear sky.


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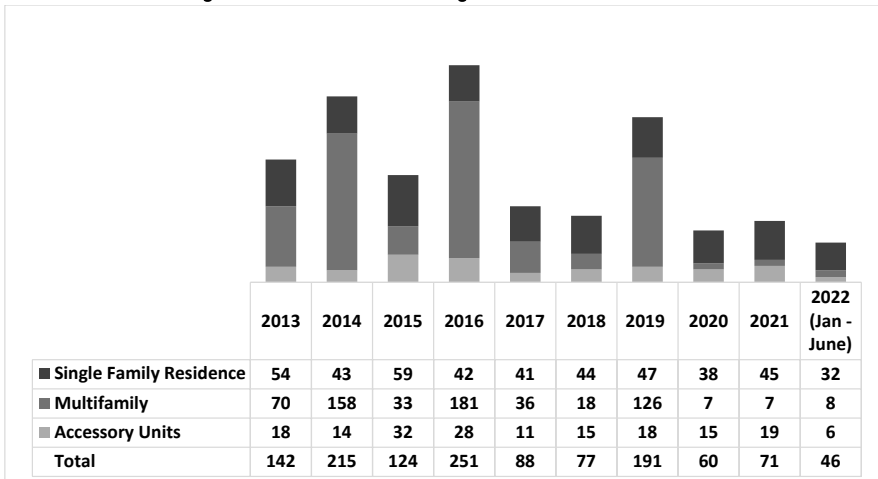
## Juneau New Housing Permits

There were 71 total housing permits issued in Juneau in 2021, up by 11 (18.3%) from the previous year. New single-family unit permits had a slight increase from 2020 to 2021. Initial data from Jan-June 2022 suggests that Juneau is on pace to exceed the number of new single-family residences that were added in 2021.

The number of multi-family unit permits issued in 2021 was seven, the same number issued in 2020. Permits for multi-family units in the first six months of 2022 have already surpassed 2021 numbers. The number of multi-family units built each year varies greatly since large projects that happen every few years can create large numbers of units (e.g., one project in 2019 added 78 new condo units by itself).

There were 19 accessory unit permits issued in 2021, up by four (26.7%) from 2020. The number of new accessory unit permits in the first half of 2022, six, suggests a slight decrease from 2021, but this is not yet a certainty.

Figure 46: New Residential Housing Permits Issued 2013 to 2022



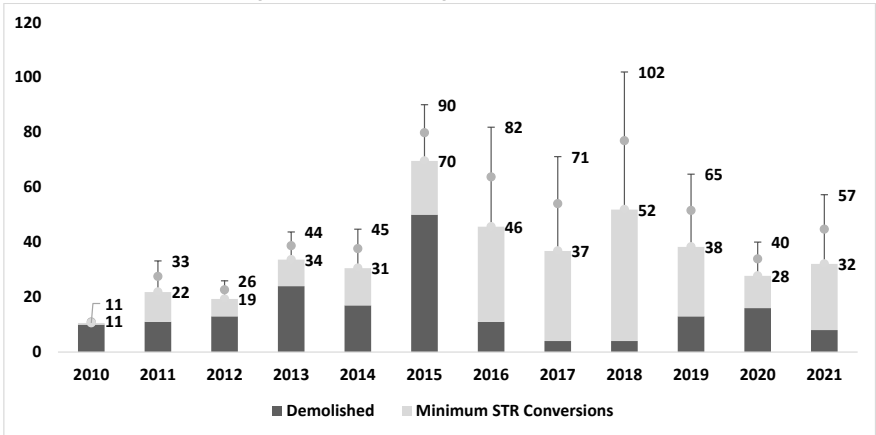
Source: City & Borough of Juneau Permit Center reports. Note: Multi-family includes properties with two or more dwellings.

181 units of housing were demolished between 2010 and 2021, an average of 15 units per year. This is comparable to 12% of the new units built over the same period. The number of short term rentals (STRs) in Juneau has grown in the last decade, according to data collected by the STR monitoring firm, Harmari. Since 2010, 616 units of housing in Juneau have been used as a STR at some point. Of those 616, 484 rentals were entire homes, and 132 were shared home rentals. At least 301 of these units were actively being used as STRs in 2021.

The number of converted STRs listed above is estimated based on the total number of STRs and the percentage of new STR listings created each year from

data provided by Harmari. They reported Juneau having a total of 616 STRs, as well as a breakout by percentage for new STR listings created each year. As it is unknown if all 616 STRs are still active, 616 is used as the maximum number of converted units, and the 301 STR units known to be active are used as the minimum number, creating a range of 301 to 616.

Figure 47: Juneau Housing Units Lost 2010 to 2021



Source: City & Borough of Juneau Permit Center reports and Harmari Dashboard Report.

### Southeast Alaska New Housing Construction

There were 68 total housing units added in Juneau in 2021, up by 10 (17%) from 2020. New multi-family constructions more than doubled from six to 13 (117%) in 2021, and single-family constructions increased by three (5.7%).

Data from Q1 2022 indicates that Juneau is not on pace to reach the levels of new housing units that it did in 2020 and 2021. In Q1 of 2022, there were 10 total units built, all of them being single-family units.

Figure 48: New Housing Units Built by Type of Structure, Select Communities 2020 – 2022 Quarter 1

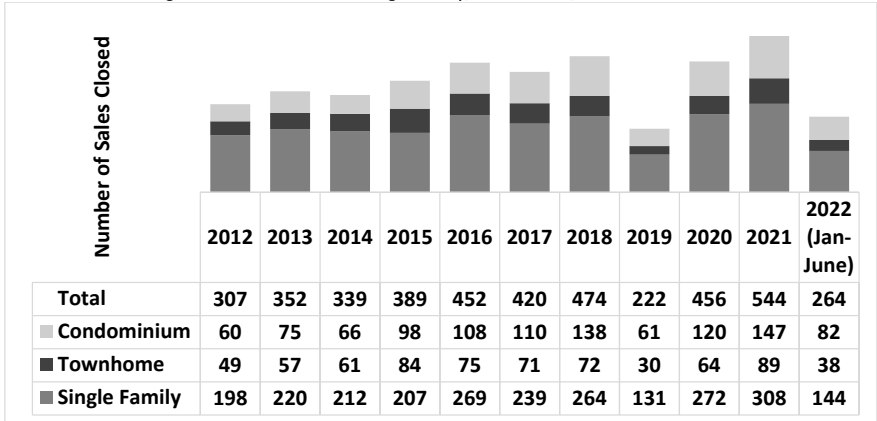
	Total Units 2020	Total Units 2021	Total Units 2022 Q1	Single Family 2020	Single Family 2021	Single Family 2022 Q1	Multi Family 2020	Multi Family 2021	Multi Family 2022 Q1
Haines	3	10	1	3	10	1	0	0	0
Ketchikan Gateway Borough	37	14	8	27	14	8	10	0	0
<b>Juneau</b>	58	68	10	52	55	10	6	13	0
Petersburg	27	8	0	2	6	0	25	2	0
Sitka Borough	29	34	16	11	17	16	18	17	0
Skagway	1	3	0	1	0	0	0	3	0
Wrangell Borough	3	7	0	3	7	0	0	0	0

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 volume increased significantly in 2021, reaching an all-time high for the decade across all home types with 544 sales closed. Single-family home sales increased 13% from the previous year, condominiums increased 23%, and townhomes 39%. If sales continue at the same pace as the first half of 2022, there will be a slight decrease compared to 2021.

Figure 49: Sales Volume of Single Family, Townhomes, and Condominiums

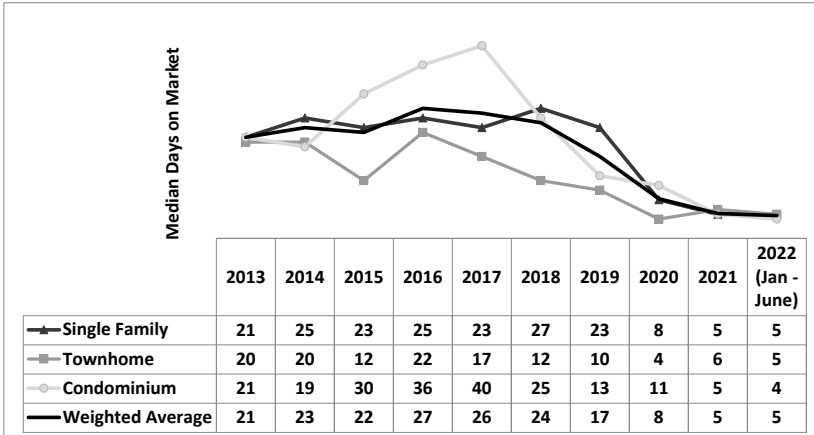


Source: Southeast Alaska Multiple Listing Service.

## Median Days on Market

The median number of days that units are on the market has dropped significantly in recent years for all types of units. Beginning in 2020, Juneau observed a decrease in the median number of days on the market. In 2021, the weighted average number of days on market was five, down from eight in 2020. So far in 2022, single-family homes and townhomes are on the market for an average of five days, while condominiums are on the market for an average of four. The weighted average of all units (five days) is a steep decline from 2019, when the average was 17 days. This decline suggests a much more tight or ‘hot’ real estate market.

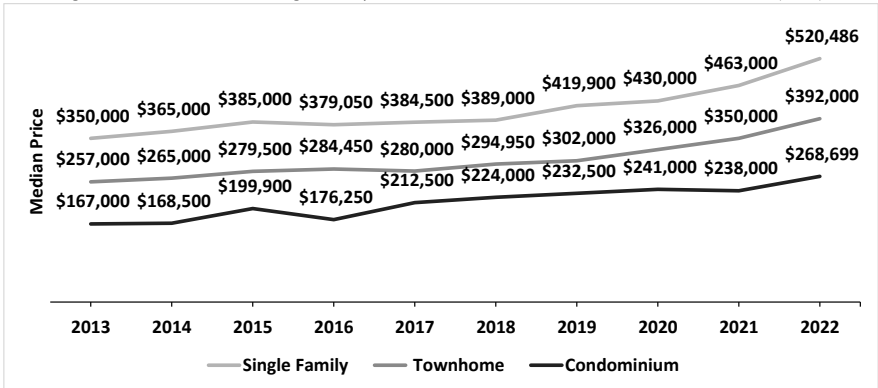




Sources: Southeast Alaska Multiple Listing Service.

The median transaction price of single-family homes increased by 7.7% from 2020 to 2021, the largest single-year increase observed on the graph. The median price for townhomes increased 7.4% but decreased 1.2% for condominiums. This large increase suggests a tight real estate market. Prices in 2022 are currently 12% higher than they were in 2021.

Figure 50: Median Price of Single Family, Attached Homes and Condominiums, 2013 – 2022 (June)

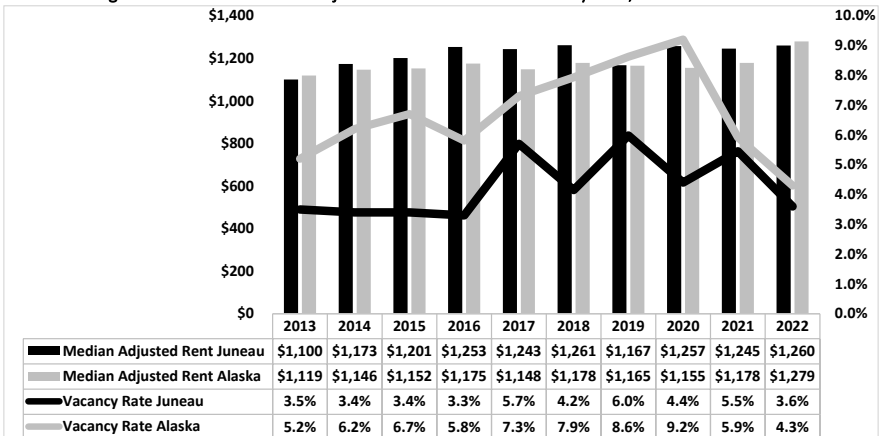


Sources: Southeast Alaska Multiple Listing Service.

## 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 2021, Juneau’s median rental price for all units decreased by 0.95% to \$1,245, consistent with levels seen in 2016 through 2018. Vacancy rates in Alaska dropped to 5.9% while those in Juneau increased to 5.5%. According to the Alaska Department of Labor and Workforce Development, the ideal vacancy rate for a community is between 6 and 7%<sup>1</sup>. This is because more vacancies allow renters more choice on where to live, putting pressure on landlords to keep units in good repair and keep prices competitive.

Figure 51: All Units Median Adjusted Rental Prices and Vacancy Rate, March 2012 - 2021



**Source:** Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section, and Alaska Housing Finance Corporation, 2021 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.

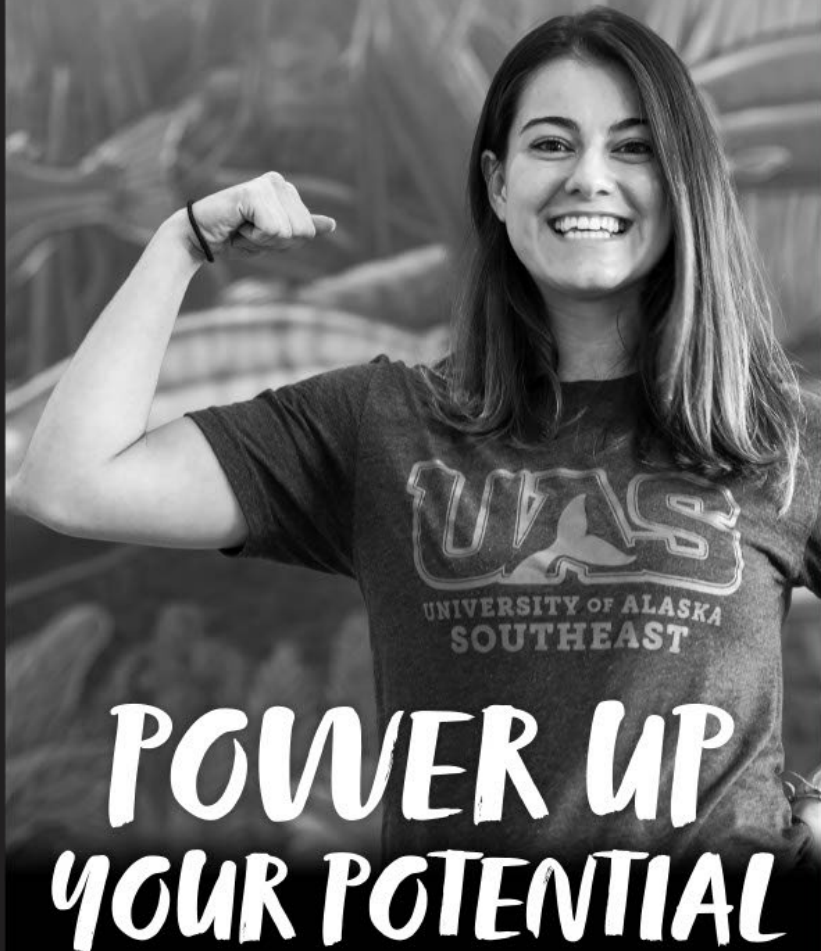
<sup>1</sup> Wiebold, Karinne. “Alaska’s Rental Market.” *Alaska Economic Trends*, Aug. 2016, pp. 4-7.



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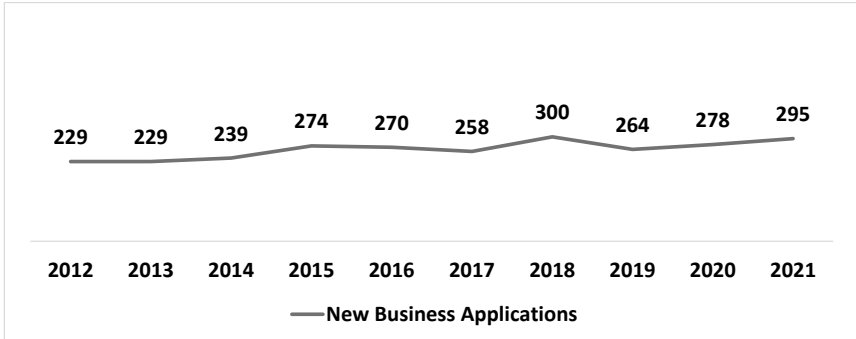
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## Entrepreneurship

New business applications are the total number of applications for an employer identification number. The number of new business applications in Juneau increased for the second year in a row, reaching near 2018 levels. The number of applications increased 7.7 percent from 2020 to 2021. New business applications are a good indicator of forming business health and entrepreneurship.

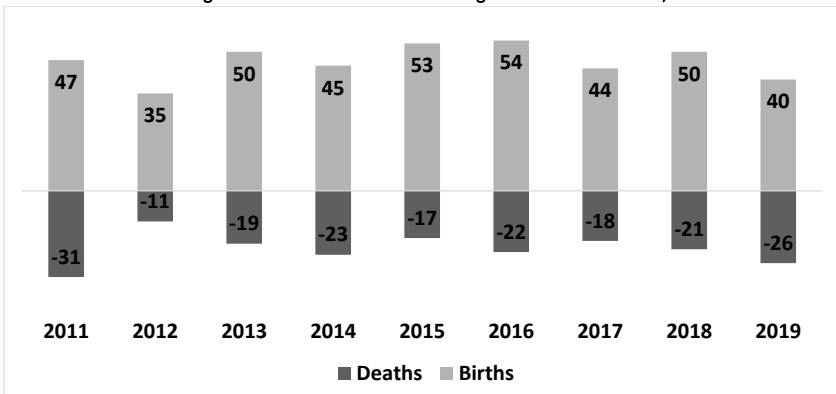
Figure 52: New Business Applications in Juneau, 2012– 2021



Source: U.S. Census Bureau, Business Formation Statistics

The number of new firms in Juneau decreased by 20% from 2018 to 2019, while young firm deaths increased by 23.8%. Young firm death is defined by firms that die within 5 years of creation. The number of new firms can serve as an indicator of economic growth. A firm is defined at the enterprise level such that all establishments under the operational control of the enterprise are considered a part of the firm. New firms are the engine of job creation in the US economy and an important source of innovation and productivity.

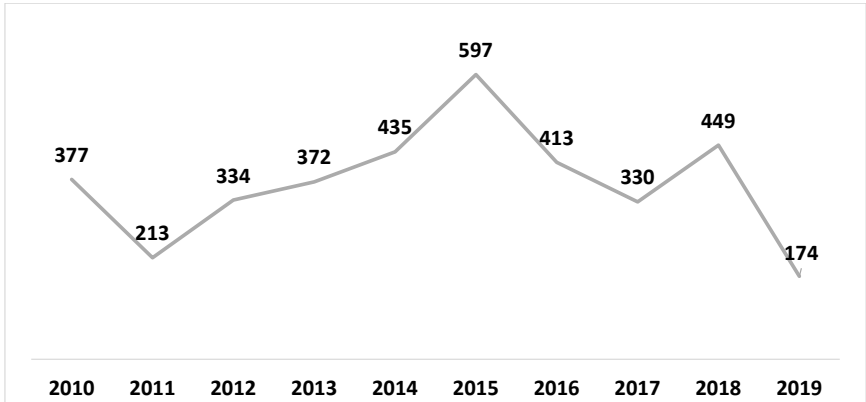
Figure 53: New Firm Births and Young Firm Deaths in Juneau, 2011– 2019



Source: U.S. Census Bureau, Business Dynamic Statistics **Note:** 2019 is the most recent year for which data is available. Young firm deaths refer to firms that die within 5 years of creation.

The number of jobs created by new establishments in Juneau decreased 61% from 2018 reaching a record low in over 10 years. New establishments are defined as those under one year old. Job creation by new establishments is an important measure of how entrepreneurship improves local economies. Job creation primarily comes from startups, surviving young businesses and the oldest and largest surviving businesses.

Figure 54: Jobs Created by New Establishments in Juneau, 2010– 2019

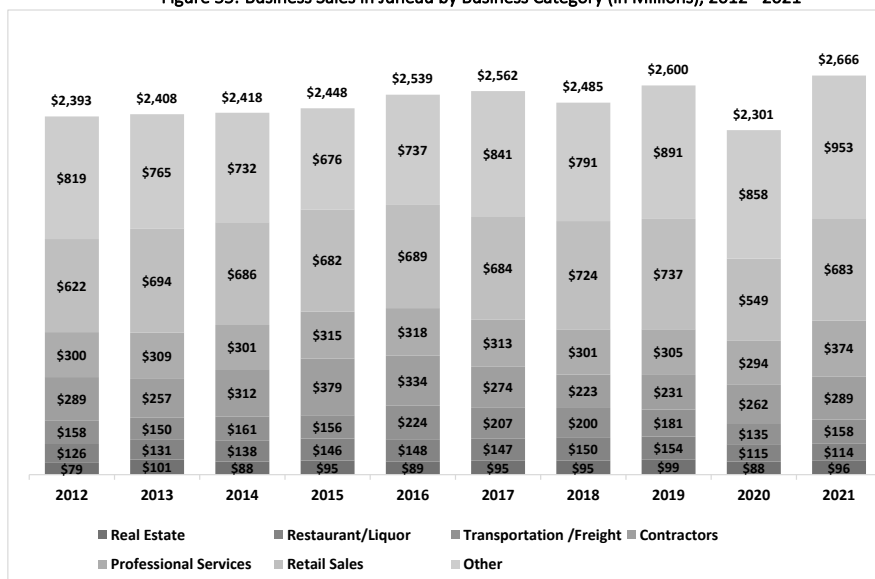


Source: U.S. Census Bureau, Business Dynamic Statistics **Note:** 2019 is the most recent year for which data is available.

## Gross Business Sales

Total gross business sales in the City and Borough of Juneau rose by 16% in 2021, following a 14% decrease in 2020. The business categories of Contractors, Professional Services, and ‘Other’ all had higher sales in 2021 compared to 2019. All business categories saw an increase in sales in 2021 versus 2020 except the Restaurant/Liquor subgroup, which observed a small ~1% decrease in business sales compared to 2020. 2021 Retail Sales, while still down 7% compared to 2019, saw a 24% increase from 2020. Professional Services had even higher growth, increasing 27% from 2020 to 2021.

Figure 55: Business Sales in Juneau by Business Category (in Millions), 2012– 2021



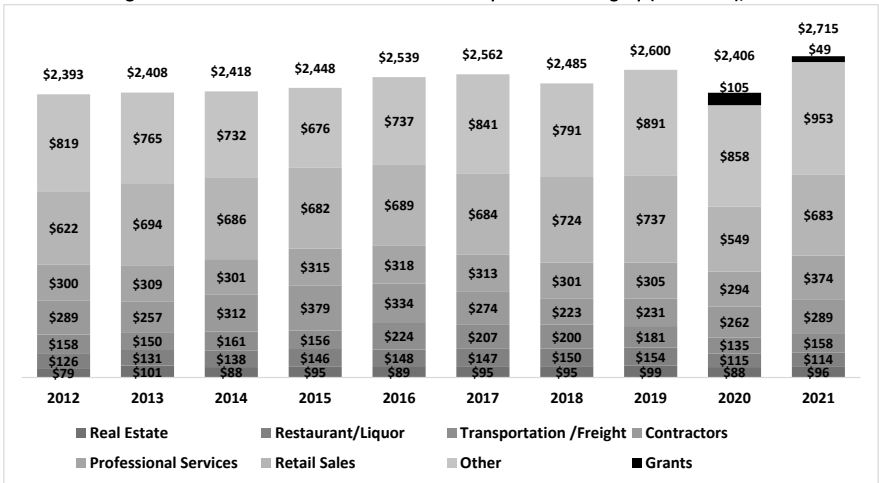
Source: City & Borough of Juneau Sales Tax Office and CBJ Comprehensive Annual Financial Report, Statistical Section. Notes: Data for 2021 was unaudited at the time of publication; “Other” category includes mineral sales, wholesale equipment, food suppliers, and fuel companies.

There was an unprecedented amount of federal dollars that entered the Juneau economy in 2020, 2021, and 2022. Figure 56 puts the funds from grants and forgivable loans given to businesses in perspective with gross business sales in Juneau. Business aid was classified by year according to the disbursement date of funds, meaning some funds from the CARES Act and COVID Relief & Omnibus Spending Bill, both passed in 2020, were actually distributed in 2021. Business aid includes programs such as the Paycheck Protection Program, AK CARES Business and Non-profit Relief Programs, and CBJ Business Sustainability Grant Programs. Aid to individuals such as the Economic Impact Payments were not included in business aid calculations.

When accounting for the \$105 million in business aid received by Juneau businesses in 2020, gross business sales were still down nearly \$200 million compared to 2019. Business aid in 2021, totaling \$49 million, just pushed an already record-breaking year of gross business sales higher. It is important to note that the value of grants is higher than the value of gross sales. Grants and forgivable loans have a negligible resource cost when compared to revenue from selling goods or providing services,

which require the acquisition of goods sold and staff time. Think about whether a business would rather receive \$100 or sell \$100 worth of product.

Figure 56: Business Sales and Grants in Juneau by Business Category (in Millions), 2012– 2021

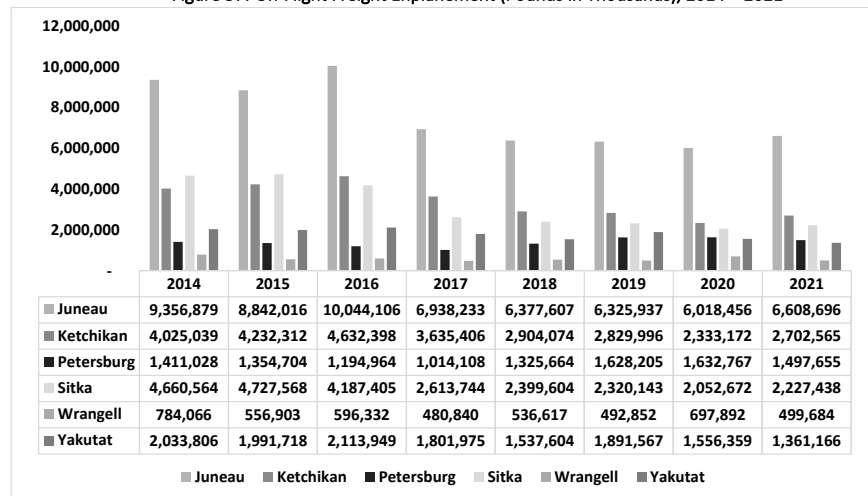


Source: City & Borough of Juneau Sales Tax Office and CBJ Comprehensive Annual Financial Report, Statistical Section & JEDC Analysis. Notes: Data for 2021 was unaudited at the time of publication; “Other” category includes mineral sales, wholesale equipment, food suppliers, and fuel companies.

### Freight Volumes

Following a steady decline since 2016, air freight enplanements in Juneau grew by 9.8% in 2021. Air freight enplanements also increased in Ketchikan and Sitka. Petersburg, Wrangell, and Yakutat saw slight decreases in 2021. The primary product shipped from Southeast Alaska by air is seafood heading to Seattle.

Figure 57: On-Flight Freight Enplanement (Pounds in Thousands), 2014 – 2021



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



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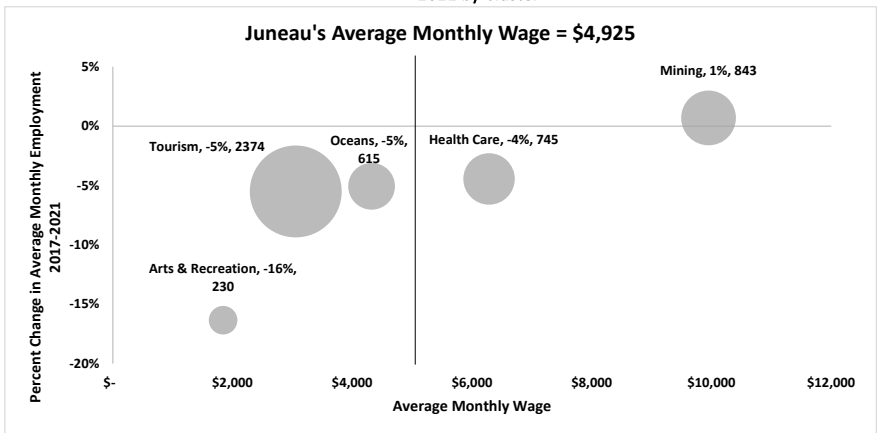
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The following figure shows the average annual change in employment in some of Juneau’s clusters. Jobs counted in each cluster are not mutually exclusive since the purpose of this figure is to measure the size and trajectory of clusters. Tourism, Oceans, and Arts and Recreation all have some crossover of jobs, meaning a decrease in something such as whale watching (relevant to both oceans and tourism) would affect multiple clusters.

Following the onset of the pandemic, Arts and Recreation (-16%), Tourism (-5%), and the Oceans (-5%) clusters all have seen an average annual decrease since 2017. Health Care has also seen an average annual decrease of 4% since 2017. Mining has seen an average annual increase of 1% since 2017. Mining also has the greatest average monthly wage (\$9,950) of the clusters shown below. Average wages for jobs in Arts and Recreation and Tourism are the lowest, paying \$1,842 and \$3,055 a month, respectively.

Figure 58: Percent Change in Average Monthly Employment 2017-2021 and Average monthly Wage in 2021 by Cluster



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

## Travel and Visitor Industry

Tourism grows the local economy because it brings in new money from outside the community. Businesses that serve the tourism industry often also serve the residents of Southeast Alaska. Examples are restaurants, and support services for air and water transportation. For this reason, it is not possible to separate out employment statistics that can be attributed just to the tourism industry. Rather, to report employment and wage data, JEDC aggregates all jobs in leisure, hospitality and transportation to gauge the health of the tourism industry.

The lack of cruise passengers and independent travelers hit Juneau and the rest of Southeast Alaska hard in 2020. In 2021, Juneau saw the beginning of a recovery, with employment up for both Juneau and Southeast Alaska by 15.8% and 17.6%, respectively. Earnings were also up for Juneau and Southeast Alaska, by 24.4% and 23.6% respectively. The number of firms in 2021 declined more significantly than in

2020, but this is to be expected, as the 2021 numbers are a better reflection of the overall effect of the pandemic on firm closures due to the lag time associated with firm closures.

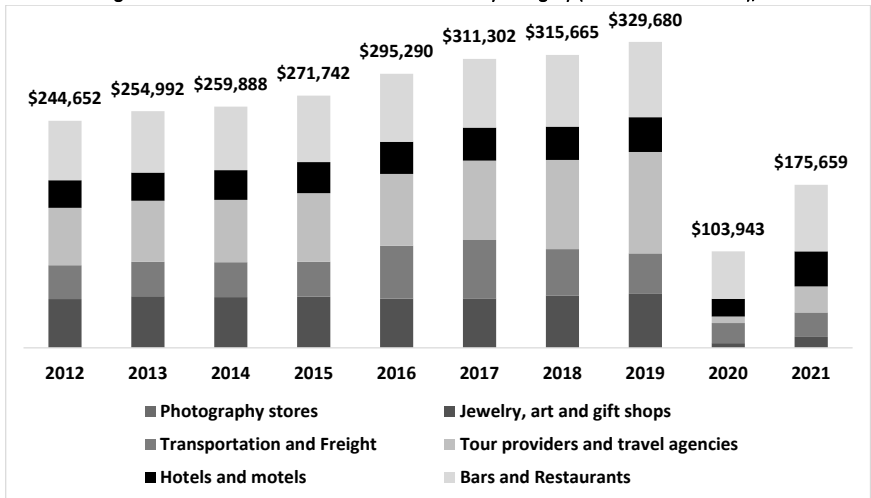
Figure 59: Leisure, Hospitality, and Transportation Industries Employment and Earnings, 2017-2021

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2017	198	660	2,813	6,717	\$82,318,620	\$215,085,772
2018	200	666	2,987	6,962	\$92,094,125	\$231,907,883
2019	208	679	3,154	7,254	\$103,225,389	\$253,718,558
2020	206	671	1,874	4,445	\$62,667,514	\$163,805,705
2021	199	661	2,170	5,229	\$77,938,167	\$202,389,689
<b>Change 2020 to 2021</b>	-3.4%	-1.5%	15.8%	17.6%	24.4%	23.6%

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

Gross business sales from Juneau businesses involved in tourism saw a minor recovery in 2021, increasing by 69.0% from 2020. Gross business sales related to tourism were still down \$154 million (-46.7%) compared to 2019. Car Rentals (part of transportation) and hotel and motel gross sales saw the greatest recovery in 2021 while Tour Providers and Travel Agencies and Jewelry, Art, and Gift Shops were still down 74% and 80% from 2019, respectively. The strong recovery posted by Car Rentals and Hotels and Motels indicates a strong return of independent tourism in 2021.

Figure 60: Gross Tourism Related Business Sales by Category (Thousands of Dollars), 2012-2021



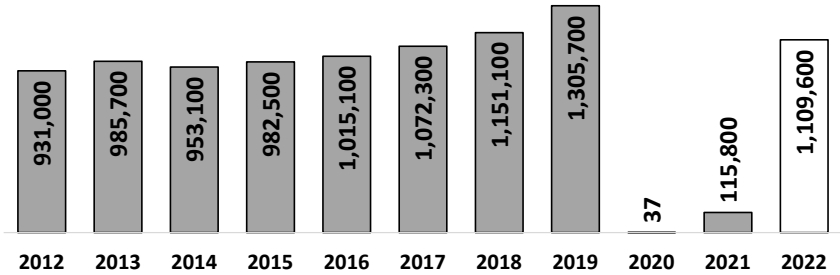
Source: City & Borough of Juneau Sales Tax Office and CBJ Comprehensive Annual Financial Report, Statistical Section. Notes: Data for 2021 was unaudited at the time of publication; Gross business sales related to tourism are determined by the type of business, not individual sales, and count sales at all times throughout the year. This data includes sales to locals.

### Cruise Ship Visitation

After reaching over one million cruise passengers in 2016, Juneau’s cruise passenger volume continued to grow through 2019, when it reached a record high of 1,305,700 visitors. Due to COVID-19, only one small cruise ship left Juneau in August of 2020,

carrying 36 passengers. Cruise tourism returned by late July in 2021 and brought a total of 115,800 passengers to Juneau, just under 10% of the 2019 season. JEDC expects Juneau to see 1,109,600 cruise passengers in the 2022 season. This estimate is based on lower berth capacity and the number of disembarking cruise passengers in Juneau in from April through July 2022 obtained through CBJ Dock and Harbors.

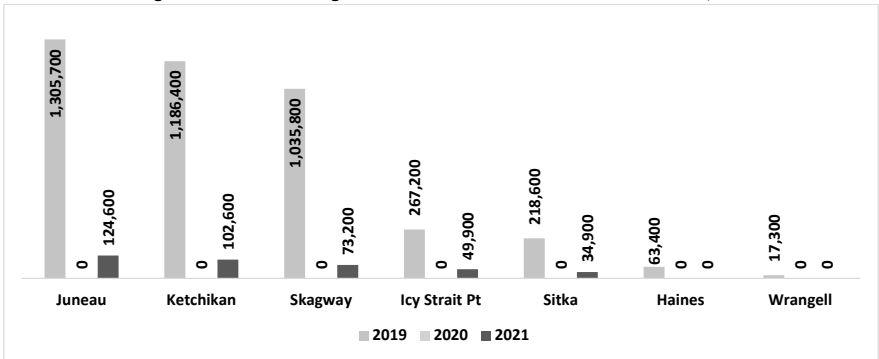
Figure 61: Cruise Passengers Visiting Juneau, 2012 - 2022



Source: Cruise Line Agencies of Alaska and McDowell Group. The cruise passenger count for 2022 is an estimate based off total lower berth capacity of ships with Juneau port calls and CBJ Docks and Harbors passenger counts from April through July of 2022

Southeast Alaska saw the return of large and small cruise ships in 2021. Passenger numbers were anywhere from 7.6% to 18.7% of their 2019 levels among communities that saw the return. The communities of Haines and Wrangell were excluded from the relatively small number of port calls in 2021 but are seeing the return of cruise ships in the summer of 2022.

Figure 62: Cruise Passengers Volumes for Southeast Alaska Communities, 2019 – 2021



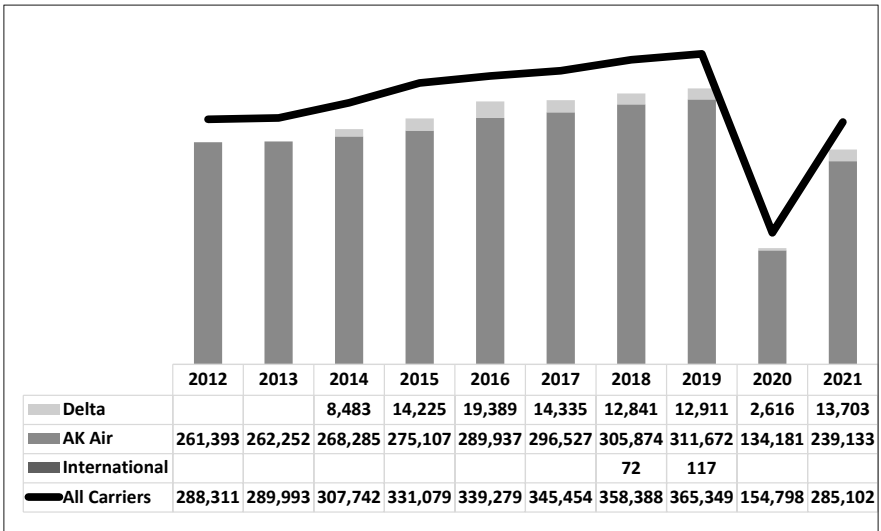
Source: Cruise Line Agencies of Alaska and McDowell Group. Note: These figures do not include most small cruise ship lines.

### Airline Passenger Traffic

While 98 percent of all cruise visitors come to Juneau, only about 10 percent of tourists arriving in Alaska by air come to Juneau. Passenger enplanement statistics can serve as a good indicator of economic activity in Juneau, since business, convention, and most independent tourists come predominantly by air. In 2020, Juneau’s air travel was about 42% of what it was in 2019. This decline reversed the

next year, and in 2021 Juneau had an 86.4% increase in passenger enplanements. While still lower than 2019, 2021 numbers indicate an upward trajectory.

**Figure 63: Scheduled Air Passenger Enplanements at Juneau International Airport, 2012-2021**



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

**Figure 64: Scheduled and Non-scheduled Air Passenger Enplanements at Select Southeast Communities**

	2019	2020	2021	Percent Change 2020 - 2021
Juneau	459,191	164,447	306,512	86.4%
Ketchikan	149,606	67,185	119,451	77.8%
Sitka	90,839	65,793	117,728	78.9%
Petersburg	23,479	38,343	80,366	109.6%
Wrangell	14,776	7,102	12,100	70.4%
Klawock	12,980	10,077	14,157	40.5%
Yakutat	12,808	5,959	10,899	82.9%
Gustavus	11,130	2,959	10,305	248.3%
Haines	10,013	4,093	7,206	76.1%
Hoonah	8,056	4,472	5,575	24.7%
Skagway	8,044	1,807	3,082	70.6%

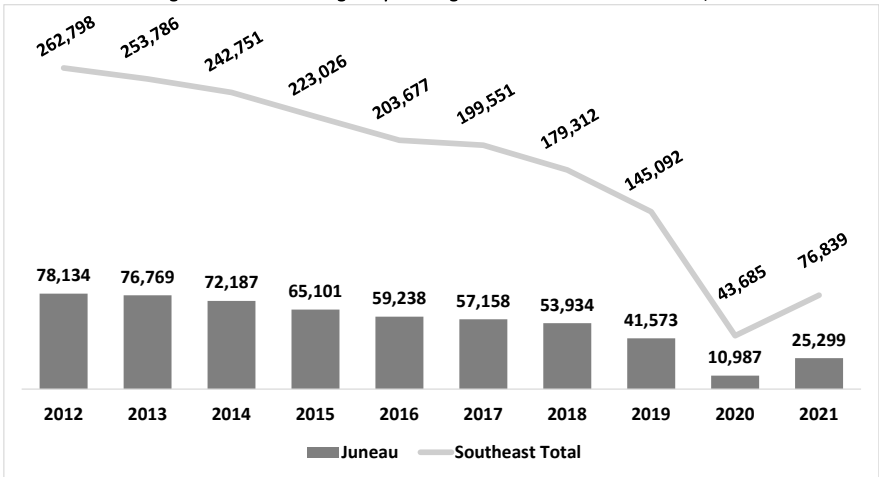
Source: Federal Aviation Administration, Airports, Preliminary CY 2021 ACAIS. **Note:** Non-scheduled service includes air taxi/commercial and private activity.

## Ferry Traffic

Ferry traffic volume reflects both tourism travel and regional personal travel among residents. From 2012 to 2019, ferry travel declined both regionally and locally. This decline in ferry travel throughout the region was exacerbated due to the pandemic, falling 71.3% percent from 2019 to 2020 and reaching a record low. Tourism and travel between communities was significantly reduced by the COVID-19 pandemic. In 2021, there was a slight rebound in ferry travel around the Southeast region by

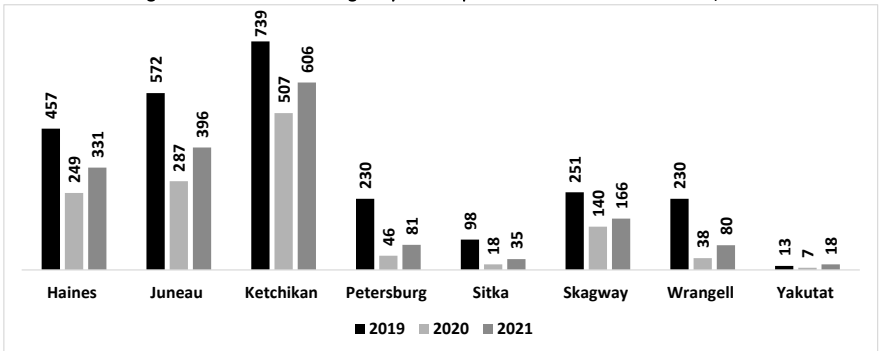
76%, but it was still down 47% compared to 2019. In Juneau, 2021 ferry travel numbers were up 130% from 2020, but down 39% from 2020.

Figure 65: Disembarking Ferry Passenger Traffic Juneau and Southeast, 2012-2021



Source: Alaska Department of Transportation, Alaska Marine Highway System, Marine Traffic Manager

Figure 66: Alaska Marine Highway Port Departures for Select Communities, 2019 – 2021

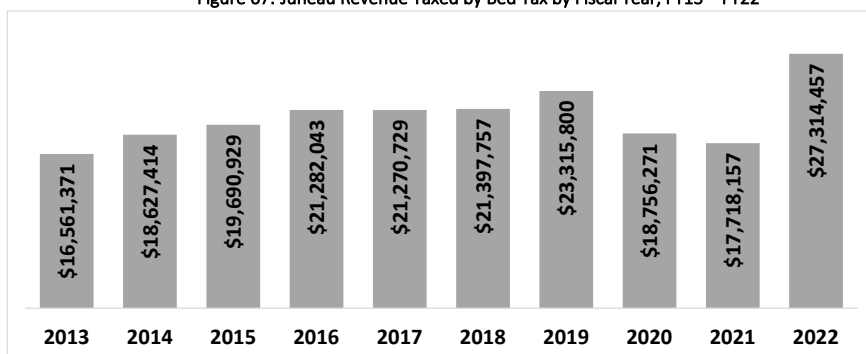


Source: Alaska Department of Transportation, Alaska Marine Highway System, Marine Traffic Manager

### Visitor-related Tax Revenue

Juneau’s hotel tax revenue can be used to indicate the health of the independent tourism and the business travel sectors. In the October 1, 2019 City and Borough of Juneau Regular Municipal Election, voters approved an increase to the CBJ hotel/motel tax, raising the tax rate from 7 to 9 percent. This increase became effective January 1, 2020. The two percent increase is temporary, extending to December 31, 2034. Despite the increase in tax rate, 2020 Taxed Hotel Revenue fell by 20% nominally and 37% when accounting for the tax increase. Since the CBJ’s fiscal year starts on July 1, the 2020 fiscal year only includes the first two months of the pandemic. In FY22, taxed revenue exceeded FY19 and was the highest on record.

Figure 67: Juneau Revenue Taxed by Bed Tax by Fiscal Year, FY13 – FY22



Source: City and Bureau of Juneau Comprehensive Annual Financial Report, July 1, 2019 - June 30, 2020, Statistical Section

## Health Care Industry

In 2021, both Juneau and Southeast Alaska as a whole observed increases in total earnings (8.2% and 6.6% respectively) within the health care industry for the second consecutive year. Juneau and Southeast Alaska saw slight increases in employment numbers, too: increases of 3.3% and 2%, respectively. Juneau saw six new social assistance firms start in the second half of 2020. The number of firms in Juneau decreased by one in 2021, contrasting the region-wide increase in firms (+16% regionally). Juneau's health care employment has generally risen and fallen with Juneau's population. As Juneau's and Southeast Alaska's populations continue to age, it is expected that demand for health care will rise.

Figure 68: Private Health Care and Social Services Employment and Payroll, 2016 - 2021

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2016	121	261	1,701	3,683	\$73,152,855	\$164,297,414
2017	115	254	1,670	3,841	\$77,383,767	\$177,893,856
2018	112	248	1,638	3,904	\$82,144,110	\$196,642,935
2019	111	254	1,610	3,989	\$81,489,212	\$211,463,440
2020	117	268	1,496	3,849	\$82,831,639	\$219,744,316
2021	116	311	1,546	3,926	\$89,592,733	\$234,289,376
Change 2019 to 2020	-0.9%	16.0%	3.3%	2.0%	8.2%	6.6%

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

## Natural Resources and Mining Industry

Juneau's average monthly employment in the natural resources and mining sector grew by 52 jobs to 875 (+5.9%) in 2020. Despite the significant increase in employment, earnings increased by only 1.9%, following a 10% increase the prior year. The rise in employment coupled with a small increase in total earnings indicates potentially stagnating wages. Total firms in Juneau remained the same for the first time in the past five years. In Southeast Alaska as a whole, there were a total of 1,255 workers in the mining industry, which includes Kensington and Greens Creek Mines. This is an increase of 2.6% from 2020. Earnings in Southeast Alaska increased by a small margin of 0.9%. Despite a significant increase in gold and silver

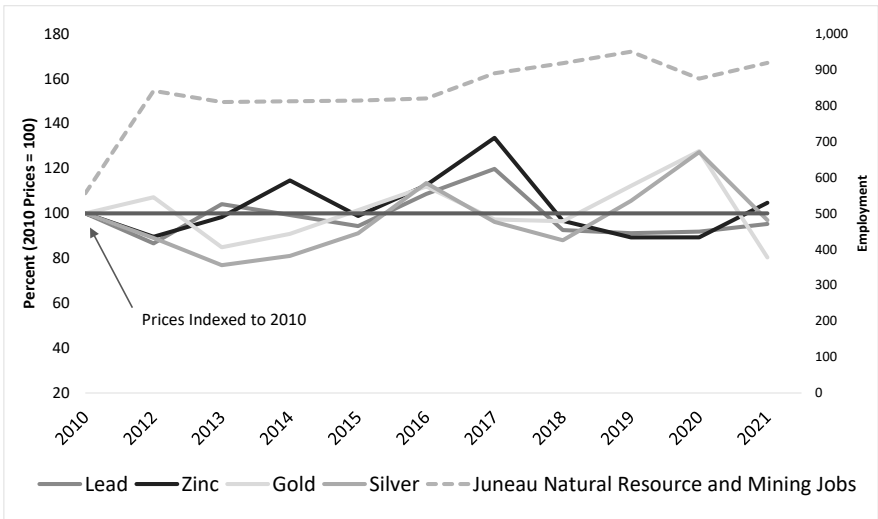
prices in 2020, prices for these precious metals fell in 2021 to around 2018 levels. Zinc increased in value, while lead remained fairly consistent.

Figure 69: Natural Resources and Mining Employment and Payroll, 2015-2021

	Number of Firms		Average Employment		Total Earnings	
	Juneau	Southeast	Juneau	Southeast	Juneau	Southeast
2016	11	69	820	1,158	\$83,559,450	\$101,998,083
2017	12	76	891	1,240	\$88,235,285	\$109,308,256
2018	14	77	918	1,241	\$92,836,267	\$112,349,130
2019	15	78	950	1,359	\$92,719,063	\$119,061,411
2020	18	78	875	1,223	\$102,045,889	\$124,280,198
2021	18	74	927	1,255	\$103,980,305	\$125,415,637
Change 2020 to 2021	0%	-5.1%	5.9%	2.6%	1.9%	0.9%

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

Figure 70: Prices of Metals Mined in Juneau and Natural Resources and Mining Employment, 2012 – 2021 Indexed to 2010 Dollars



Source: The World Bank, Alaska Department of Labor and Workforce Development, Quarterly Census of Employment and Wages; Note: Prices are in real dollars.

## Seafood Industry

### ***Southeast Alaska Resident Fishermen***

The pandemic depressed fish prices due to a drop in restaurant demand, resulting in a decline in harvest value and volume in 2020 and a consequent drop in the number of fishers and permit-holders. 2021 has brought about an increase in the number of new permits across Southeast Alaska, up 25.7% from 2020. The number of permit holders is up 22.5%, and the number of fishers who actually fished in 2021 is up 24.1%. Fishing crew licenses have increased by 3.4%. Total participation (fishers who fished plus crew licenses) was up 12.7% in 2021.



Figure 71: Southeast Alaska Resident Commercial Fishermen and Crew, 2021

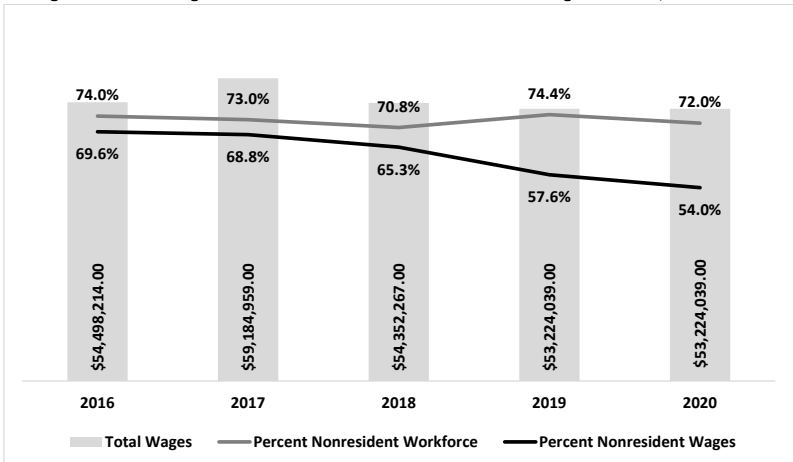
Borough or Census Area	Fishing Permits Issued	Permit Holders	Fisherman who Fished	Fishing Crew Licenses	Total Participation
Sitka	991	505	373	432	805
Petersburg	1086	462	310	273	582
<b>Juneau</b>	<b>579</b>	<b>363</b>	<b>216</b>	<b>317</b>	<b>533</b>
Ketchikan Gateway	574	341	209	309	518
POW-Hyder	506	286	202	149	351
Wrangell	363	200	145	144	289
Haines	234	157	92	49	141
Hoonah-Angoon	149	96	80	77	157
Yakutat	231	147	109	28	137
<b>Total Southeast 2021</b>	<b>4,713</b>	<b>2,557</b>	<b>1,736</b>	<b>1,778</b>	<b>3,513</b>
Total Southeast 2020	3,749	2,088	1,399	1,719	3,118
<b>Change 2020-2021</b>	<b>25.7%</b>	<b>22.5%</b>	<b>24.1%</b>	<b>3.4%</b>	<b>12.7%</b>

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City", 2021; Alaska Department of Fish & Game, 2021 Comm. Crew Licenses dataset.

### Seafood Processing Employment in Southeast Alaska

Seafood processing is a primary component of Southeast Alaska’s manufacturing segment. In 2020, regional seafood processing employment dropped 9.3% to 2,952 workers. Of the 2,952 employed in seafood processing, 72% were non-Alaskan residents. The percentage of nonresident workers dropped two percentage points in 2020 and has remained relatively consistent over the past 5 years. However, the percentage of nonresident wages has decreased steadily, dropping 3.6 percentage points from 2019 and 24.2 percentage points since 2011.

Figure 72: Total Wages and Percent Nonresident Seafood Processing Workforce, 2016-2020

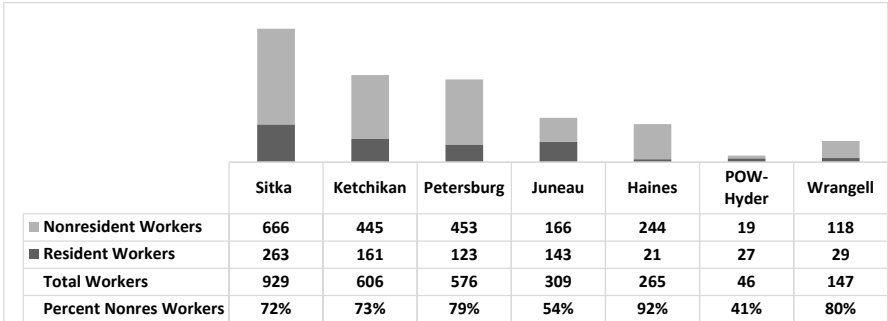


Source: Alaska Department of Labor and Workforce Development, "Nonresidents Working in Alaska", 2020. Note: Worker count is the cumulative number of workers who worked over the course of a year, not the number of jobs.

Sitka, Ketchikan, and Petersburg are the primary locations for nonresident seafood processing employees in Southeast Alaska. Juneau has one of the lowest

percentages of nonresident workers at 54%, above only Prince of Whales-Hyder at 41%. Haines has the highest at 92% nonresident workers.

Figure 73: Resident and Nonresident Seafood Processing Workers, Select Communities 2020



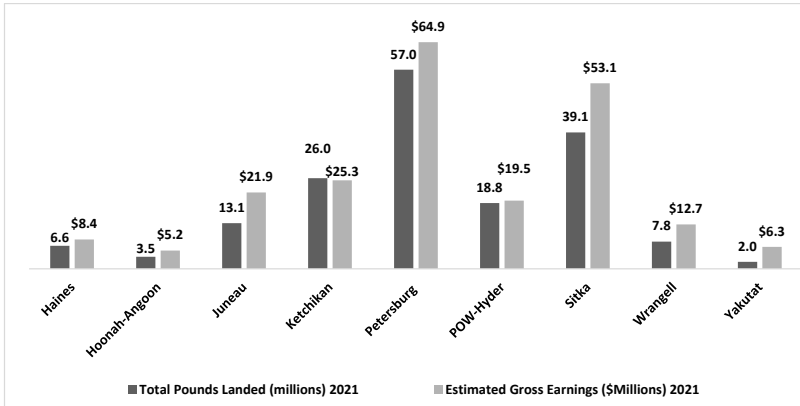
Source: Alaska Department of Labor and Workforce Development, "Nonresidents Working in Alaska", 2020, Table 12. Note: Worker count is the cumulative number of workers who worked over the course of a year, not the number of jobs.

### Commercial Harvest in Southeast Alaska

Ex-vessel value of seafood rose for all major groups except Shrimp in 2021. Total value across all seafood categories more than doubled, growing by 128.7% compared to 2020. Pink and Chum salmon saw the largest increases, their value growing by 409% and 201.7% respectively. The category of Geoduck, Sea Cucumbers, and Urchins also more than doubled, up 103.2% from 2020. Herring, which had its worst year since the 1970s in 2019 and only slightly recovered in 2020, rebounded to the highest it has been in the past five years, up 56.5% from 2020. 2021 ex-vessel value was much higher than in 2019 as well, exceeding the dismal 2019 harvest in all categories except for Shrimp and "Other." 2021 total ex-vessel value of seafood across all categories was the highest in the past four years, and is only slightly below 2017 numbers.

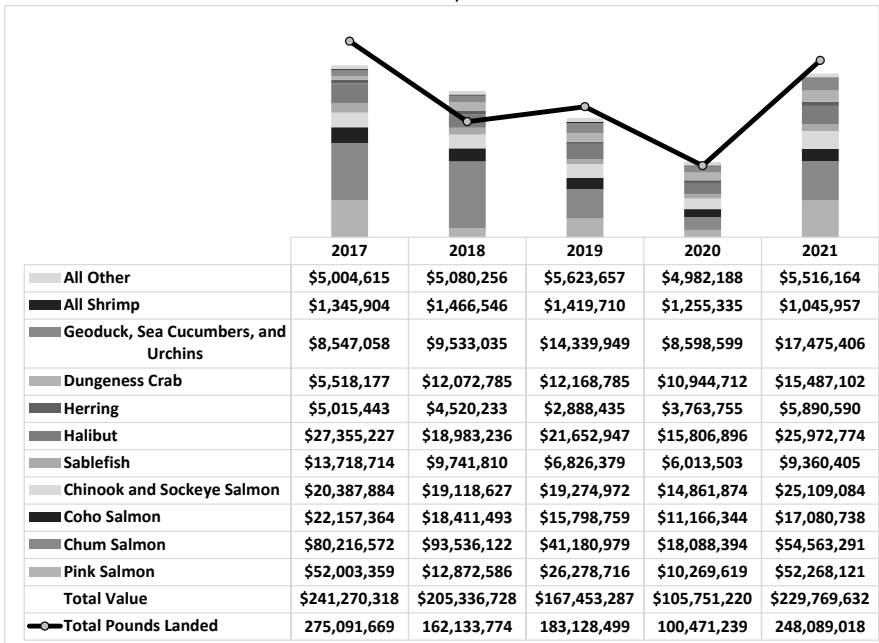
The value of Juneau's fish harvest increased in 2021, up by 66.9%. Juneau's fish harvest accounted for approximately 10% of the total value of all of Southeast Alaska's fishing industry.

Figure 74: Estimated Gross Earnings (\$Millions) and Pounds Landed (Millions) by Southeast Alaska Residents for Select Communities, 2021



Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2021

Figure 75: Southeast Alaska Commercial Seafood Industry Ex-Vessel Value by Species and Pounds Landed, 2017 - 2021



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

Figure 76: Commercial Fish Harvest by Southeast Alaska Residents: Gross Earnings (Value) and Pounds Landed (Volume) in Thousands, 2019-2021

Area of Residency	Value 2019	Value 2020	Value 2021	Volume 2019	Volume 2020	Volume 2021
Petersburg	\$48,968,021	\$37,204,233	\$64,907,038	46,010,199	25,752,794	57,033,271

Area of Residency	Value 2019	Value 2020	Value 2021	Volume 2019	Volume 2020	Volume 2021
Sitka	\$41,300,170	\$31,109,659	\$53,128,092	27,771,170	17,841,726	39,051,963
<b>Juneau</b>	<b>\$20,387,338</b>	<b>\$13,104,024</b>	<b>\$21,878,845</b>	<b>16,811,610</b>	<b>11,868,293</b>	<b>13,083,735</b>
Ketchikan	\$15,840,167	\$11,487,917	\$25,336,880	14,232,087	9,218,271	25,951,625
POW-Hyder	\$14,929,699	\$8,988,895	\$19,530,872	15,871,311	7,676,866	18,831,963
Wrangell	\$11,219,058	\$6,294,730	\$12,726,974	9,118,844	4,882,344	7,802,242
Haines	\$7,490,783	\$4,054,333	\$8,406,876	6,200,910	3,913,577	6,591,257
Yakutat	\$4,296,849	\$3,459,455	\$6,279,359	2,348,927	1,680,958	2,005,510
Hoonah-Angoon	\$4,791,762	\$3,213,616	\$5,223,232	1,874,656	1,619,881	3,458,173
<b>Total Southeast</b>	<b>\$169,223,847</b>	<b>\$118,916,862</b>	<b>\$217,418,168</b>	<b>140,239,714</b>	<b>84,454,710</b>	<b>173,809,739</b>

Source: Commercial Fisheries Entry Commission, "Permit and Fishing Activity by Year, State, Census Area or Alaskan City" 2021

### State of Alaska Shared Fish Taxes

Fisheries business tax is collected primarily from licensed processors and persons who export fish from Alaska. Alaska statutes provide that a percentage of revenue collected be shared with municipalities in which the processing took place. For fiscal year 2020, Southeast communities received a total of just under \$2.4 million from these taxes, a drop from the previous year and the lowest in the last decade. Shared Fish Taxes for 2021 were supplemented with ARPA funds to match 2019 values. Supplemental ARPA funds were 19.2% of the total Shared Fish Taxes distributed to Alaska communities in 2021.

Figure 77: Select Southeast Communities Receiving Shared Fish Taxes, 2016 - 2020

Fisheries Business Tax	2017	2018	2019	2020	2021
Sitka	\$953,324	\$1,279,885	\$1,188,722	\$621,756	\$1,188,722
Petersburg	\$877,158	\$889,855	\$749,771	\$333,751	\$749,771
<b>Juneau</b>	<b>\$389,022</b>	<b>\$447,875</b>	<b>\$407,040</b>	<b>\$388,624</b>	<b>\$407,040</b>
Ketchikan Borough	\$404,971	\$414,413	\$331,618	\$309,702	\$331,618
Haines Borough	\$128,174	\$352,884	\$226,899	\$159,925	\$226,899
Wrangell	\$314,455	\$307,405	\$284,469	\$203,246	\$284,469
Yakutat Borough	\$218,773	\$226,992	\$218,086	\$174,278	\$218,086
Hoonah	\$76,350	\$95,089	\$56,450	\$52,933	\$56,450
Craig	\$37,961	\$88,948	\$144,432	\$153,110	\$144,432
<b>Total Southeast</b>	<b>\$3,809,689</b>	<b>\$4,529,411</b>	<b>\$3,953,604</b>	<b>\$2,397,325</b>	<b>\$3,953,604</b>

Source: Alaska Department of Revenue, Tax Division, FY2021 Shared Taxes and Fees Annual Report

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Driving economic vitality in the communities Avista serves is something we value and strive to achieve through our support of multiple economic development organizations that deliver business development, expansion and job creation throughout our five-state service area. JEDC serves as the cornerstone to the region's planning and strategies related to economic development and fostering a healthy and sustainable economic climate in Juneau and throughout Southeast Alaska. We're pleased to be part of the community and to be able to support JEDC's focus on growing this region's economy.

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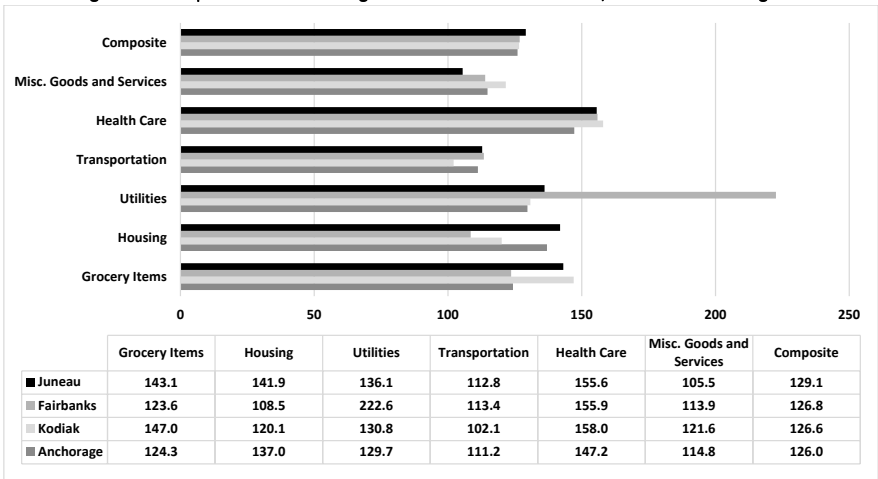


# Cost of Living

## Cost of Living Index

The Cost of Living Index is a nationwide survey of living expenses conducted three times a year in 267 U.S. cities. It establishes the average cost of living in the U.S. based on the cost of consumer goods, services, housing, energy, health care and transportation for a moderately affluent professional or executive household. The average cost across all urban communities surveyed is set at 100. Juneau’s 2021 annual average composite score of 129.1 means that it is nearly one-third more expensive to live in Juneau than the average U.S. city. This is a slight increase from 2020, where the composite score was 128.0. Healthcare, housing and grocery items are Juneau’s three highest relative cost categories, roughly one-half more expensive than the average U.S. city. Juneau ranks slightly above Fairbanks and Anchorage for overall cost of living largely due to groceries and housing, and ranks above Kodiak due to differences in housing and transportation costs.

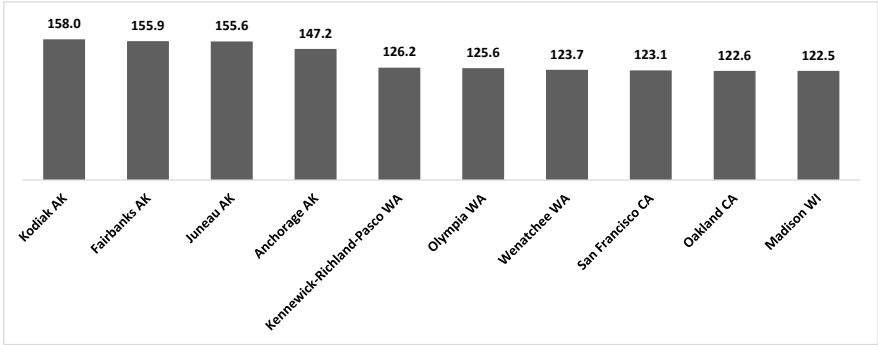
Figure 78: Comparative Cost of Living Index for Select Communities, 2021 Annual Averages



Source: Council for Community and Economic Research (C2ER), Cost of Living Index, 2020 Annual Average Data; Note: National average for 268 urban areas = 100.

Alaska’s four cities on this index (Juneau, Fairbanks, Kodiak, and Anchorage), have the most expensive health care in the nation. Fairbanks ranks highest, followed by Juneau, Kodiak, and Anchorage. The next closest city in the U.S. is almost 20 points below Anchorage, signifying Alaska’s extremely high cost of health care relative to the rest of the nation.

Figure 79: Ten Most Expensive Cities for Cost of Health Care, 2021 Annual Averages



Source: Council for Community and Economic Research (C2ER), Cost of Living Index, 2021 Annual Average Data; Note: National average for 268 urban areas = 100.

### 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 overseas duty stations (including Alaska and Hawaii) with above average prices for goods and services. COLA is determined by a survey of the cost of approximately 120 goods and services in a community compared to the same goods and services in the continental United States. COLA is adjusted downward in communities where military personnel shop at base commissaries and exchanges, as in Anchorage and Fairbanks. In general, the higher the proportion of on-base shopping, the lower the index. According to the July 2022 COLA allowance, Juneau was 40 percent more expensive for goods and services compared to the average continental U.S military location, down 2 percent from 2021.

Figure 80: US Military Overseas COLA Adjustment for Select Alaska Communities, July 16, 2019 - 2022

Community	2020	2021	2022	Community	2020	2021	2022
	Percent	Percent	Percent		Percent	Percent	Percent
Juneau	142%	142%	140%	Petersburg	144%	144%	142%
Fairbanks	128%	128%	130%	Sitka	144%	144%	140%
Anchorage	126%	126%	126%	Ketchikan	138%	138%	138%

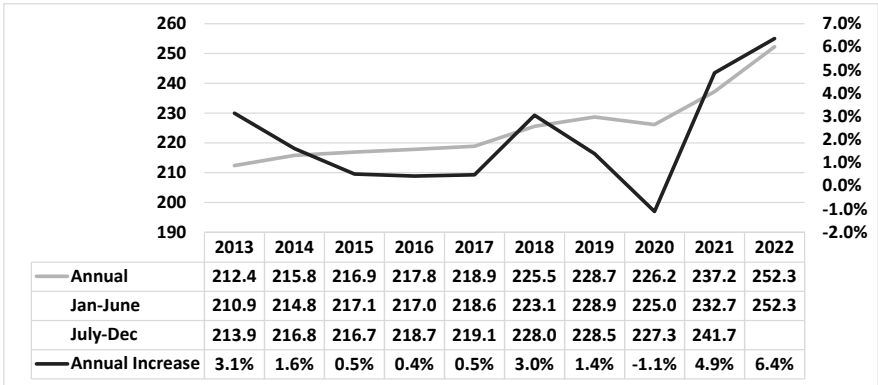
Source: U.S. Department of Defense, Overseas COLA Calculator

### Consumer Price Index

The Bureau of Labor Statistics collects and publishes an aggregate index of market price consumer goods and services bi-monthly. Index values are percent compared to 1982-1984 so an index value of 200 means prices are twice as expensive as they were in 1982-1984. In 2020, the Urban Alaska CPI fell for the first time in over ten years, ending up slightly higher than 2018 levels. In 2021, the CPI for Urban Alaska increased 4.9%, returning to the upward trend seen over the last ten years. This trend has continued in 2022, increasing by 6.4% in the Jan-June period compared to the 2021 average. This trend indicates a substantial rise in the price of goods and services starting in 2021, with the CPI rising more in the past two years than it did from 2013 to 2019.



Figure 81: Bureau of Labor Statistics Bimonthly Consumer Price Index, Urban Alaska 2013 – 2022

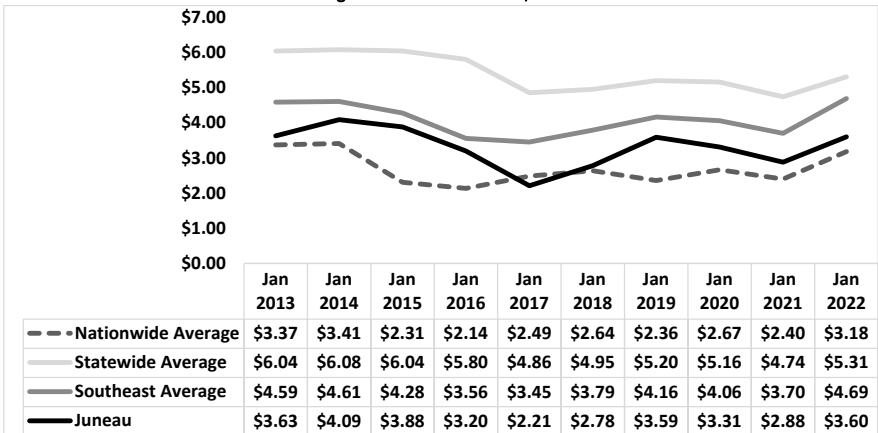


Source: Bureau of Labor Statistics, CPI for All Urban Consumers, Urban Alaska.

### Gasoline and Fuel Oil Costs

The Alaska Department of Commerce, Community and Economic Development collects retail heating fuel and gasoline prices from 100 select communities across Alaska semiannually. In January 2021, Juneau’s average gasoline cost was \$2.88, higher than the national average of \$2.40, but significantly lower than the Southeast and statewide averages. In 2022, prices rose across the nation, but Juneau gas prices remained lower than the Statewide and Southwest averages, and slightly above the nationwide average. The high cost of transporting fuel to Alaska’s remote interior communities keeps the state average much higher than local, regional and national prices.

Figure 82: Gasoline Prices, 2013 – 2022

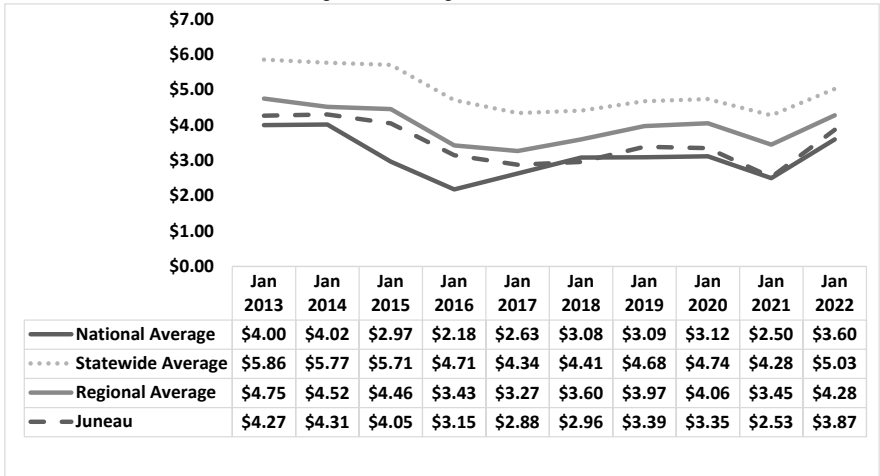


Source: Alaska Department of Commerce, Community, and Economic Development, Division of Community and Regional Affairs, Alaska Fuel Price Survey – January 2021.

Similar to gasoline prices, Juneau’s heating fuel price was slightly higher than the national average in both January 2021 and 2022, but lower than that of the region or state. 2021 heating fuel prices reached a low point at \$2.53, down 24.5%

compared to 2020. This dip in price was temporary, with prices rising by 53.0% in 2022. The relatively shorter distances to fuel distribution centers and year-round marine access contribute to Southeast’s lower prices. It should also be noted that the state price excludes the Northern Region where prices are subsidized.

Figure 83: Heating Fuel Prices, 2013 – 2022



Source: Alaska Department of Commerce, Community, and Economic Development, Division of Community and Regional Affairs, Alaska Fuel Price Survey – January 2022.

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## MISSION

The Juneau Economic Development Council fosters a healthy and sustainable economic climate in Juneau and throughout Southeast Alaska.

In collaboration with other organizations, JEDC implements initiatives to maintain, expand, and create jobs and economic opportunities.

## JEDC FOCUS

Help Make Juneau a Great (Capital) City  
Strengthen Key Regional Industries  
Promote Entrepreneurship and Small Businesses  
Develop Talent  
Deliver Core Economic Development Services



[JEDC.org](http://JEDC.org)

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