

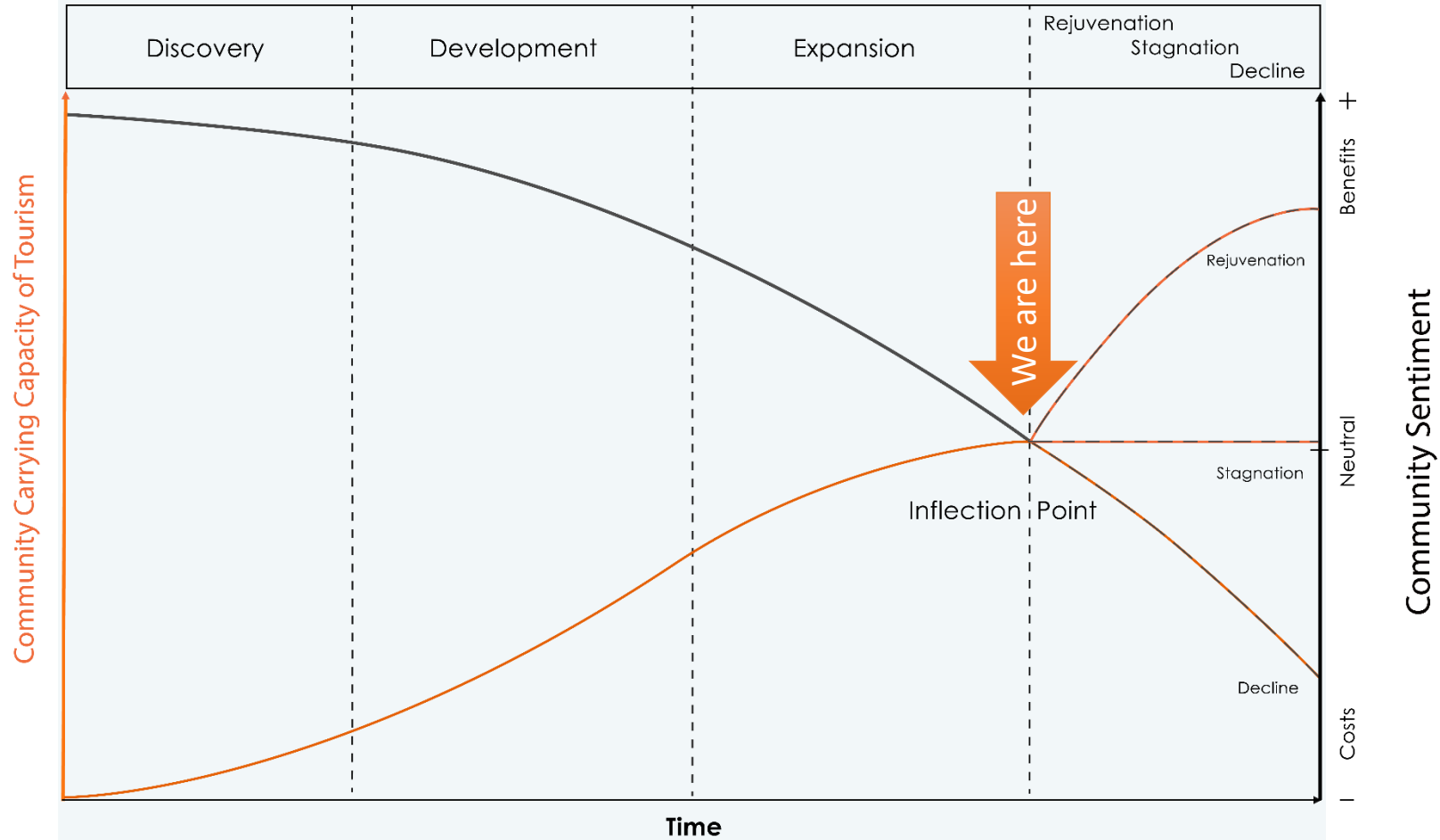
State of the Visitor Industry

Assembly COW

April 3, 2023

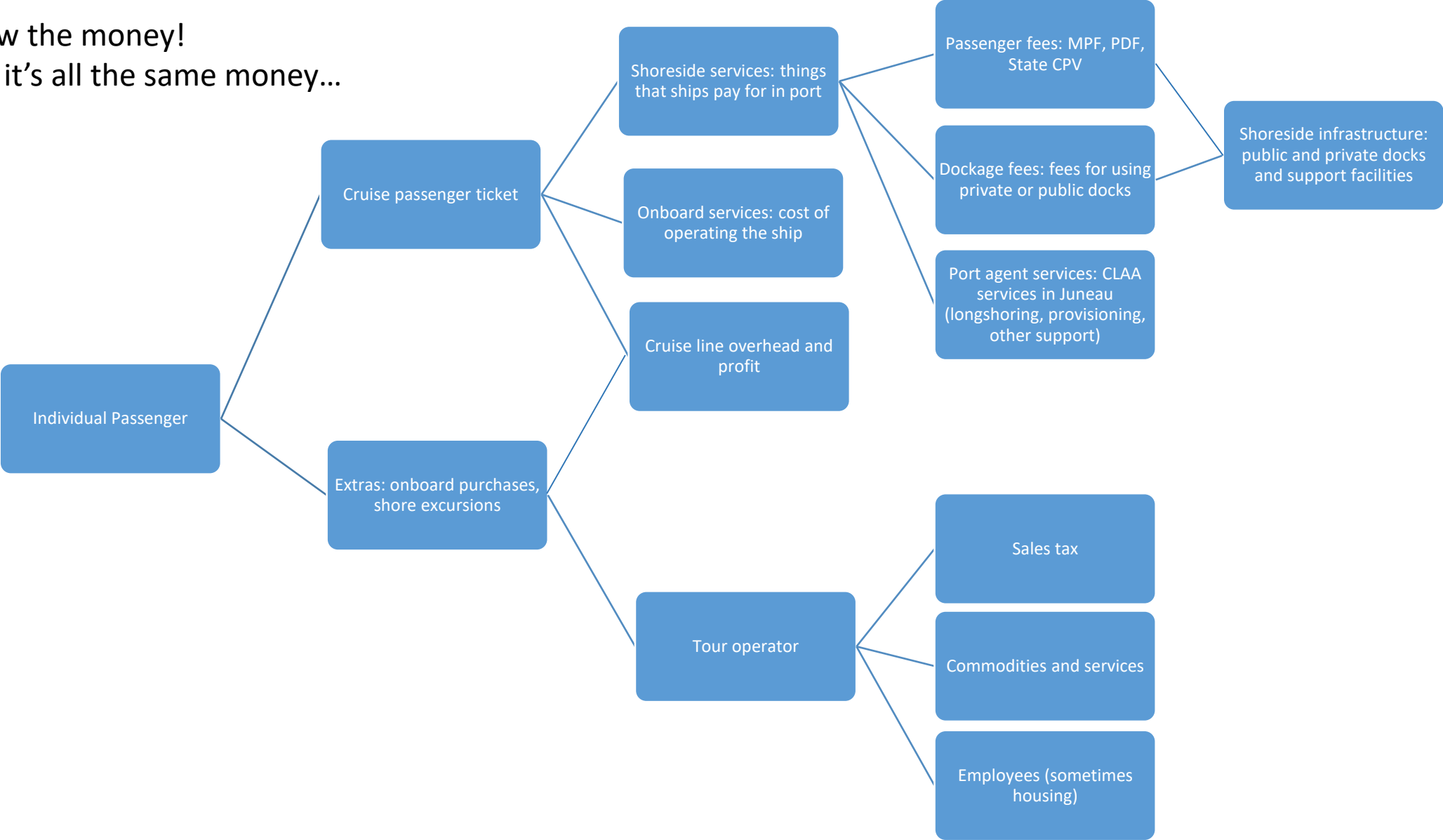
Destination Lifecycle

Community Sentiment Impact



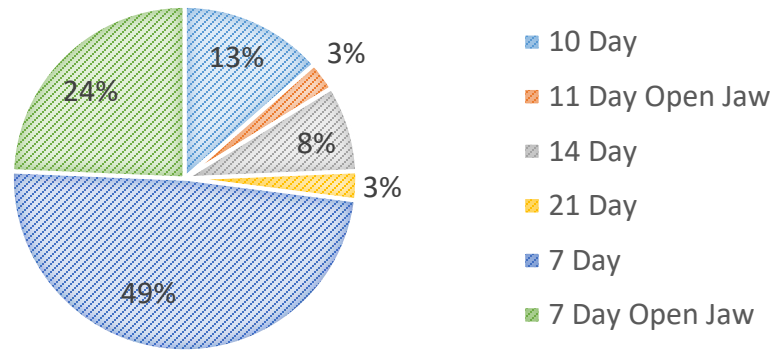
Oregon State
University

Follow the money!
Hint: it's all the same money...

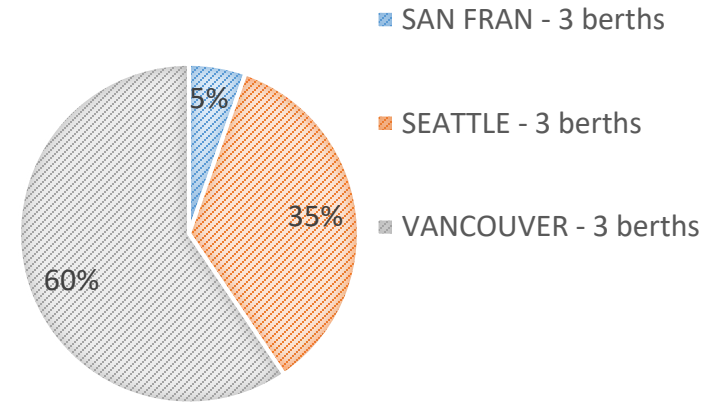


Itineraries

ITINERARY TYPES

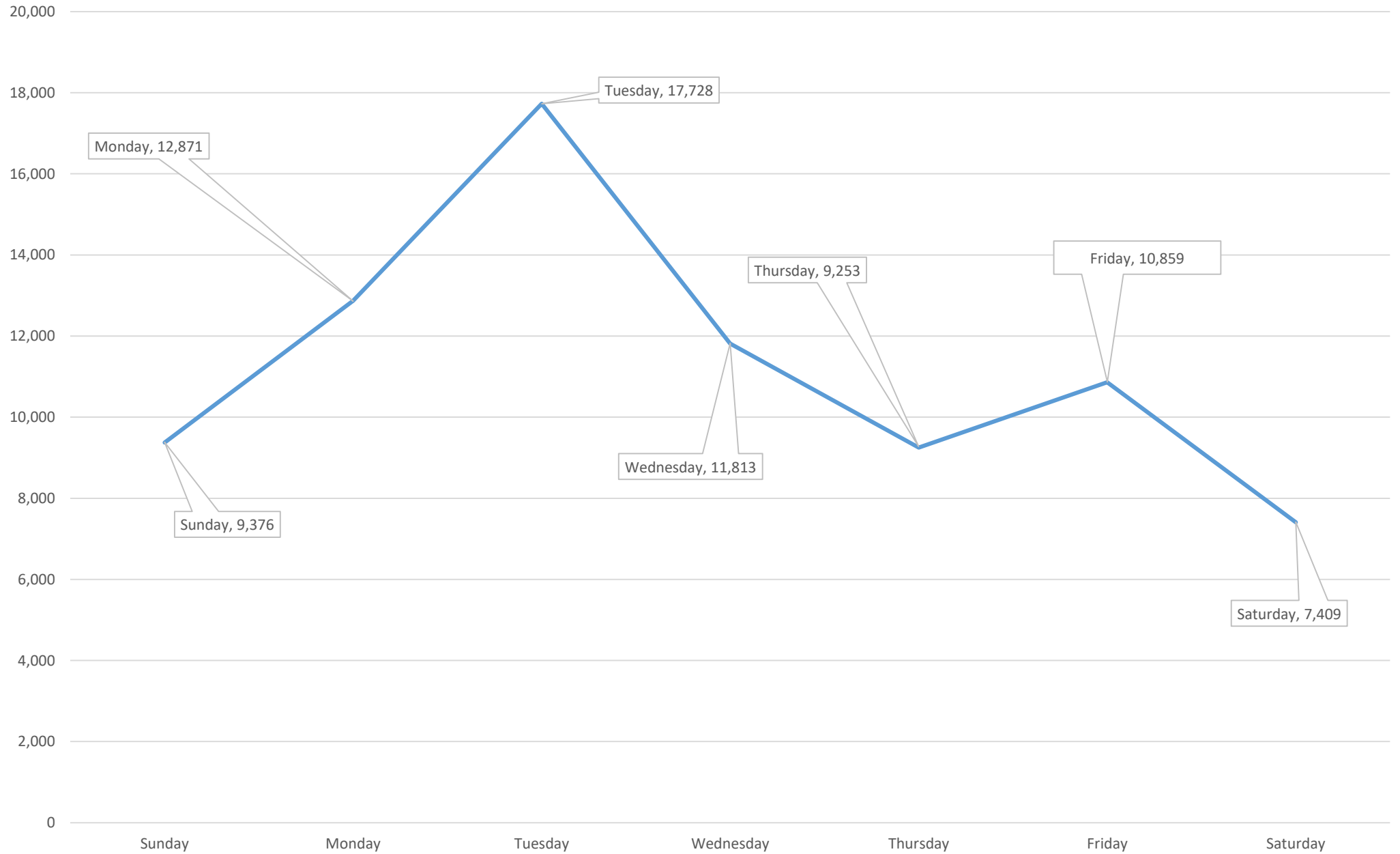


HOMEPORT



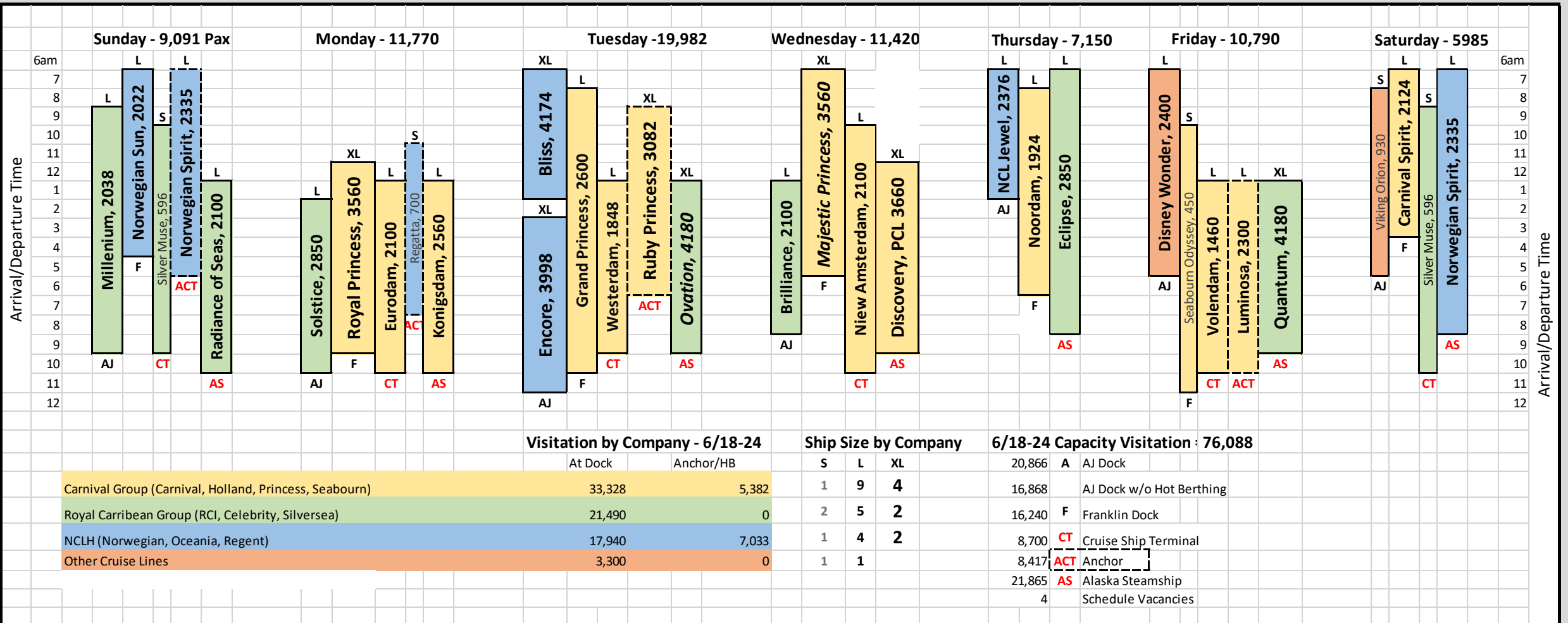
- Traditional Itinerary: 7 days round trip, Vancouver or Seattle
- Open Jaw Itinerary: 7 days point to point, Seward or Whittier, typically includes an interior tour
- Outlier Itineraries: Queen Elizabeth – rotates between 7/10/12 day itineraries, Majestic Princess – rotates between 7 day open jaw and 14 day round trip, Viking Orion – sails 11 day open jaw and spends 3 days in Seward

Average Cruise Ship Passengers/Day of the Week
Port of Juneau
June 2023

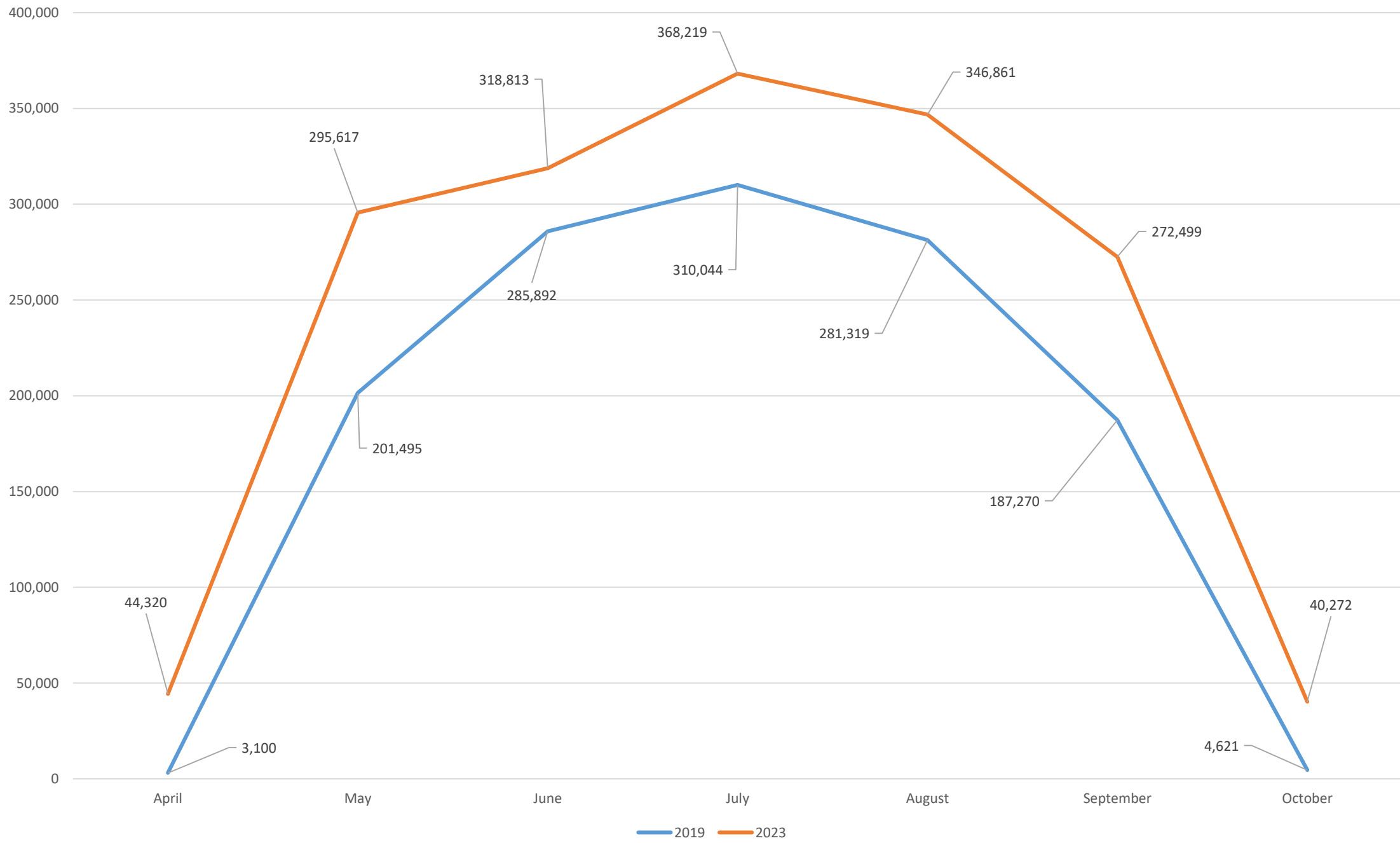


Weekly Snapshot, June 2023

Port of Juneau Cruise Ship Schedule for the Week of June 18-24, 2023



Port of Juneau, Cruise Visitation Trends/Passengers per Month – 2019 vs 2023



Theoretical Maximum Visitation

| Current Capacity | | | | | |
|------------------------------|------------|-------------------|-----------------|-----------------|-----------|
| Dock/Ship Type | Passengers | Spring Season Pax | Peak Season Pax | Fall Season Pax | Total |
| XL | 4000 | 90,000 | 550,440 | 45,000 | 685,440 |
| XL | 3000 | 67,500 | 412,830 | 33,750 | 514,080 |
| L | 2500 | 56,250 | 344,025 | 28,125 | 428,400 |
| S | 700 | 15,750 | 96,327 | 7,875 | 119,952 |
| L (lightered) | 2000 | 45,000 | 275,220 | 22,500 | 342,720 |
| | | | | | 0 |
| | | 274,500 | 1,678,842 | 137,250 | 2,090,592 |
| Adjusted for Additional Dock | | | | | |
| Dock/Ship Type | Passengers | Spring Season Pax | Peak Season Pax | Fall Season Pax | Total |
| XL | 4000 | 90,000 | 550,440 | 45,000 | 685,440 |
| XL | 3000 | 67,500 | 412,830 | 33,750 | 514,080 |
| L | 2500 | 56,250 | 344,025 | 28,125 | 428,400 |
| S | 1000 | 22,500 | 137,610 | 11,250 | 171,360 |
| XL (docked) | 3500 | 78,750 | 481,635 | 39,375 | 599,760 |
| S | 700 | 15,750 | 96,327 | 7,875 | 119,952 |
| | | 330,750 | 2,022,867 | 165,375 | 2,518,992 |

- This represents how we get to 2 million passengers at our current capacity and how we get to 2.5 million with a new dock
- Many assumptions are made in this table – the port is full every day, we will see a 4000 passenger ship every day, etc. but it shows the path for growth.
- Data is based on current ship sizes and on trends in ship building.
 - New builds trend toward the small luxury market (<1000 pax) and the large mass market (>3000 pax)



AJ Dock
18+ Bus Spaces

Franklin (aka Princess)
15+ Bus Spaces

Cruise Ship Terminal (CBJ)
12+ Bus Spaces

Proposed Support Dock
Aak'w Landing (HTC)
14+ Bus Spaces

Steamship Wharf (CBJ)
12 Bus Spaces

Peratrovich Plaza
12 Small Bus/Van Spaces

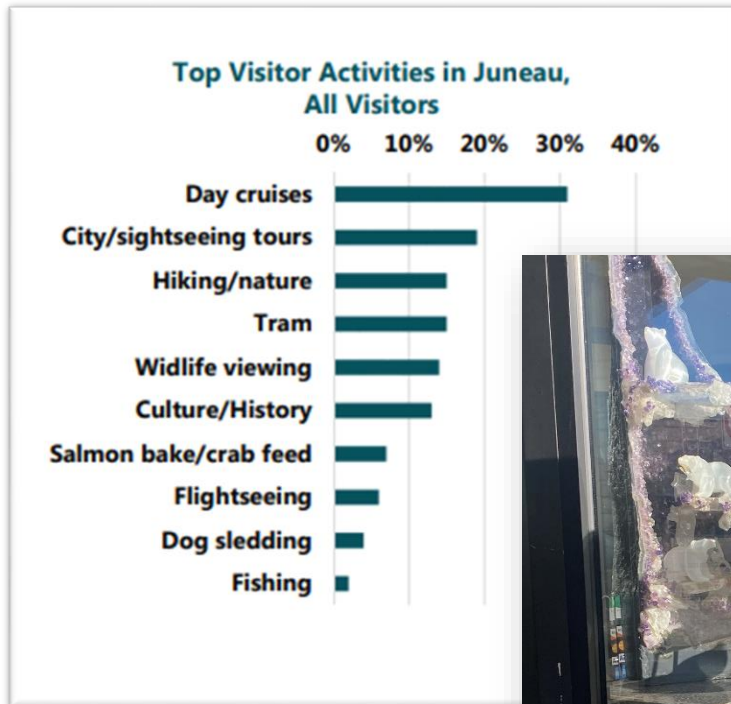
Alaska: current and future business

| Coming to Alaska | Planning to Come to Alaska |
|---|---|
| Carnival – Holland America, Princess, Carnival, Cunard, Seabourn, etc. (90 ships, 8 ordered, 42% of pax 2021) | MSC – MSC, Explora (19 ships, 3 ordered, 10% of pax 2021), other business: shipping (560 ships) |
| Royal Caribbean – Royal Caribbean, Celebrity, Silversea (60 ships, 4 ordered, 24% of pax 2021) | Virgin (2 ships, 2 ordered, 1% of pax 2021), other business: airlines, media, etc. |
| Norwegian Cruise Line – Norwegian, Regent, Oceania (18 ships, 5 ordered, 10% of pax, 2021) | |
| Disney (5 ships, 3 ordered, 2% of pax 2021), other business: theme parks, media, merchandise, etc. | |
| Viking (82 ships, 9 ordered, 1% of pax 2021), mostly river cruise ships, all new builds are ocean ships | |

Quick Stats

- Current Stats
 - 447 ships worldwide
 - 680,573 cruise berths carrying 31.16 million passengers
 - 90+ cruise brands
- Future Stats
 - 66 new cruise ships worldwide by 2028
 - 499 total cruise ships worldwide by 2028
 - 37.4 million passenger capacity by 2027
- Alaska is 6% of global cruise business
- Cruise lines look at desirability, revenues, and past experience when choosing itineraries. For better or worse, Juneau has all three

Shoreside Activities



McDowell Group, 2016



- Local economic benefits of tourism are derived from the activities passengers do on shore
 - Tours, shopping, dining out, ancillary benefits
- The goal of any destination is to maximize local economic benefits while minimizing negative impacts
- A near-term public process on shore excursion disbursement and longer-term regional strategy should focus on several key principles:
 - Minimizing resident impacts
 - Recognizing that all tourism management decisions are interconnected
 - Articulating community goals and priorities (starting with the VITF recommendations)
 - Promoting a managed and sustainable industry locally and regionally
 - Maximizing local employment, business ownership, and economic activity
 - Industry-buy in and incentives to reward “good neighbor” operators

Commercial Use, Shore Excursions, Public Experience

