



Formerly McDowell Group

JUNEAU TOURISM SURVEY

2023

December 2023

PREPARED FOR:

City and Borough of Juneau



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Executive Summary

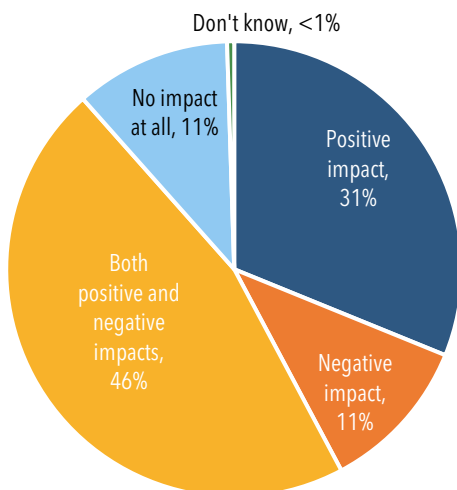
The City and Borough of Juneau contracted with McKinley Research Group to conduct a telephone survey of 517 randomly selected Juneau residents regarding tourism. The survey was conducted in fall 2023; similar surveys were conducted in 1995, 1998, 2002, 2006, 2021, and 2022. To qualify for the survey, respondents were required to be current residents and to have lived in Juneau in the summer of 2023. Survey results were weighted by age and neighborhood to reflect population characteristics. Following are key survey results.

Overall Impacts: Positive vs. Negative

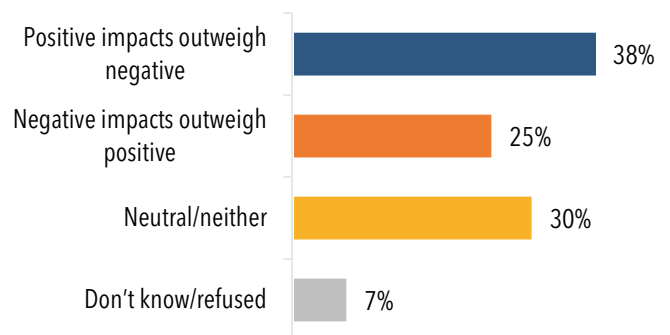
When asked about the overall impact of tourism on their household, three out of ten respondents (31%) said that tourism had an overall *positive impact*, while 11% said it had a *negative impact*. The most common response was *both positive and negative impacts* at 46%, while 11% said they felt no impact at all.

Those that said *both positive and negative impacts* were asked whether the positive outweighed the negative or vice versa; these respondents were more likely to say *positive impacts outweigh the negative* (49%) than *negative impacts outweigh the positive* (32%); another 12% said *neither/neutral*.

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

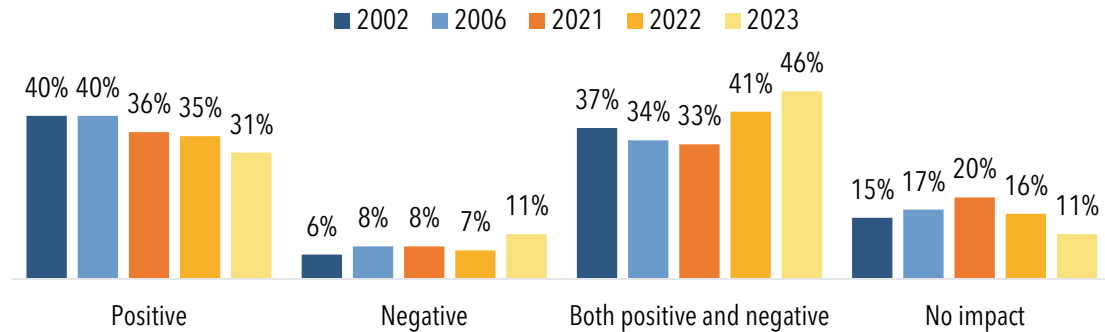


Among those who responded "Both:" Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



The question about the overall impact of tourism has been asked over the last five editions of the survey. Those reporting overall positive impacts decreased over time from 40% in 2002 and 2006 to 31% in 2023, while those reporting negative impacts increased from 6% to 11%. The percentage reporting both positive and negative impacts shows the largest difference, all in the last three years: from 33% in 2021, to 41% in 2022, to 46% in 2023. Those reporting no impacts fell over the same time period: from 20% to 16% to 11%.

Comparison: Overall Impact of Tourism on Households, 2002, 2006, 2021, 2022, 2023

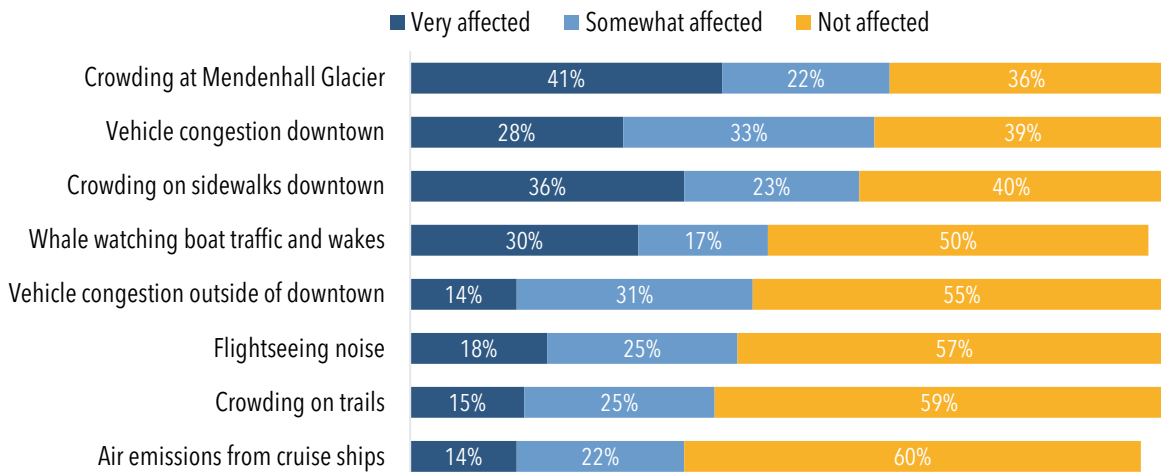


Notes: The 2021 survey referred to 2019 impacts. Excludes "don't know" and refused responses.

Specific Impacts

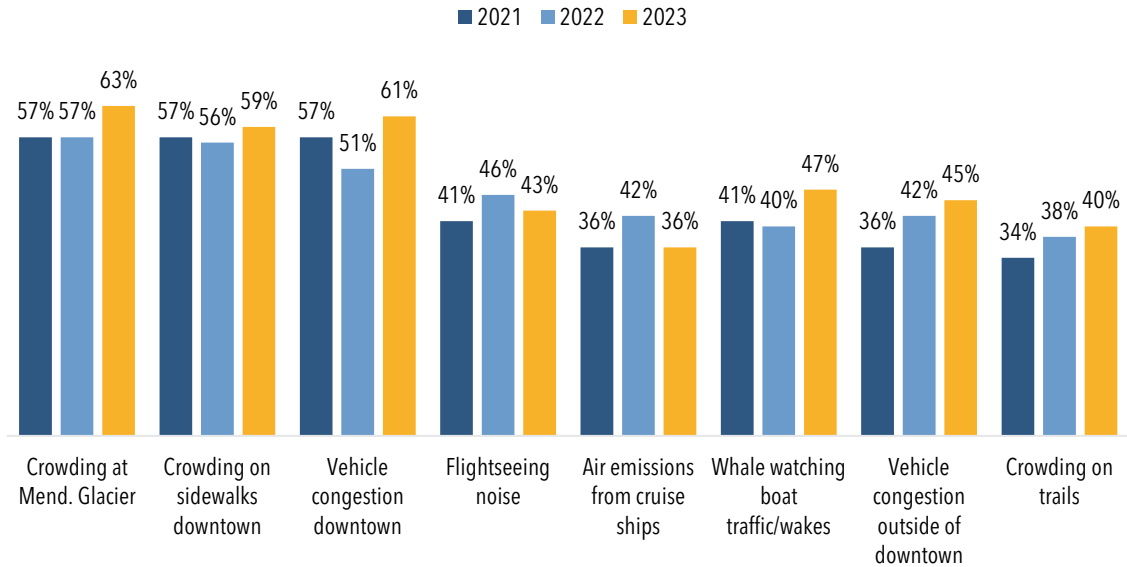
Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2023. Respondents were most likely to be affected by *crowding at Mendenhall Glacier* (63% somewhat or very affected), *vehicle congestion downtown* (61%), and *crowding on sidewalks downtown* (59%).

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



The rates of those somewhat or very affected by tourism-related impacts was highest for six out of eight categories in 2023 compared to the previous two years. Those somewhat/very affected by *crowding at Mendenhall Glacier* increased from 57% in 2022 to 63% in 2023. Those somewhat/very affected by *vehicle congestion downtown* increased from 51% in 2022 to 61% in 2023. Those somewhat/very affected by *whale watching boat traffic and wakes* increased from 40% in 2022 to 47% in 2023. Those somewhat/very affected by *vehicle congestion outside of downtown* increased from 36% in 2021 to 42% in 2022 to 45% in 2023.

Percentage of Households Somewhat/Very Affected, 2021, 2022, 2023



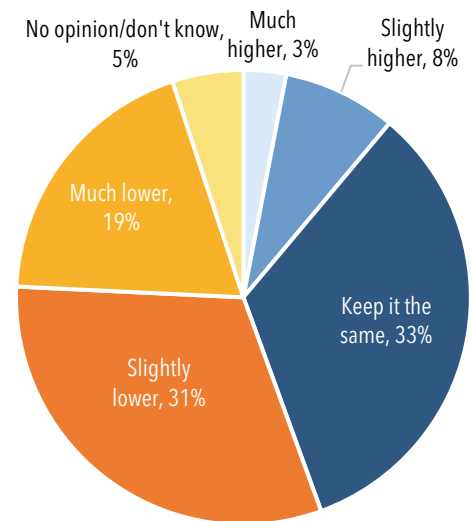
Cruise Passenger Volume

Respondents were read the following before the next question:

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

They were then asked their preference for future cruise passenger volume. One-half (50%) would prefer volume to be lower, including 19% who would prefer it much lower. One-third (33%) would prefer keeping it the same, while 11% would prefer it higher, including 3% who would prefer it much higher.

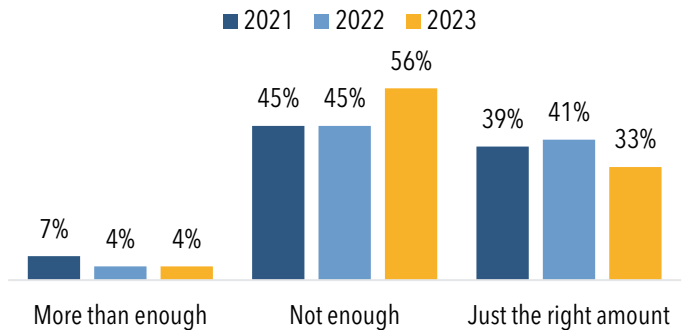
What is your preference for future cruise passenger volume in Juneau?



Tourism Management

When asked to rate how CBJ is managing the impacts of the visitor industry, the most common response is that CBJ is *not doing enough* (56%), followed by *just the right amount* (33%). The percentage saying CBJ is *not doing enough* increased from 45% in 2022 to 56% in 2023, while those saying CBJ is doing *just the right amount* decreased from 41% to 33%.

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

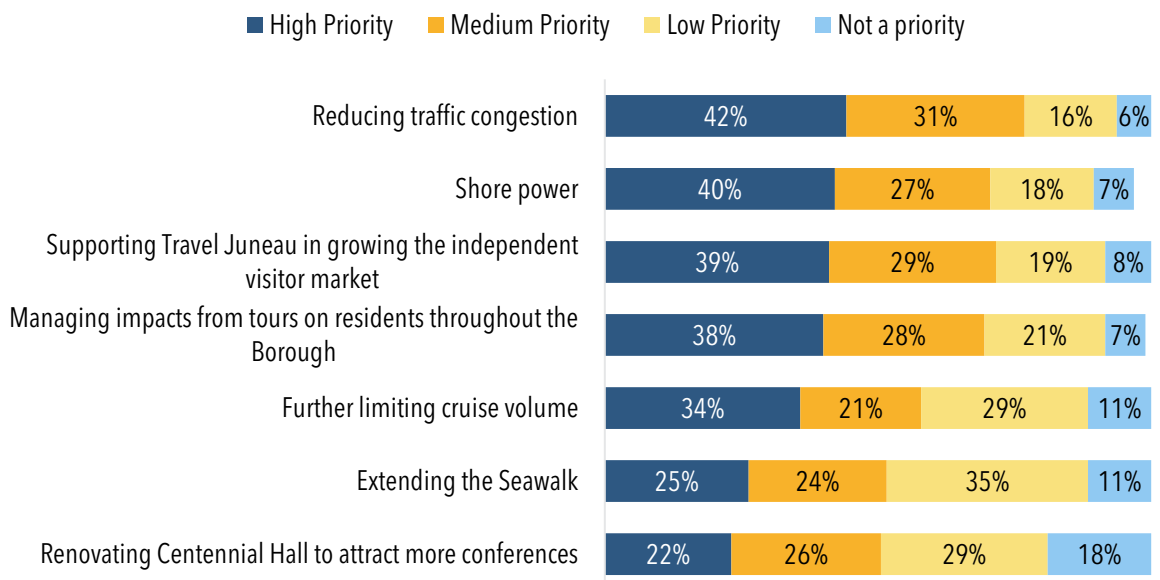


Note: Excludes "don't know" responses.

CBJ Tourism Priorities

Residents were asked what level priority should be placed on seven different CBJ tourism activities. The highest priority was *reducing traffic congestion*, with 42% saying this should be high priority, followed by *shore power* at 40%, *supporting Travel Juneau in growing the independent visitor market* at 39%, and *managing impacts from tours on residents throughout the borough* at 38%.

Should CBJ place a high priority, medium priority, or low priority on each of the following items?



Note: Rows do not add to 100% due to *don't know* responses.

Introduction and Methodology

Introduction

The City and Borough of Juneau (CBJ) contracted with McKinley Research Group (MRG; formerly McDowell Group) to conduct a public opinion survey of Juneau residents regarding tourism. Results help inform CBJ's tourism management and planning efforts. This is the third consecutive tourism survey of Juneau residents, following similar surveys in 2021 and 2022; previous surveys were also conducted in 1995, 1998, 2002, and 2006.

Methodology

The survey was designed by MRG staff in cooperation with CBJ staff. Many questions from the previous surveys were repeated in order to gauge trends. To qualify for the survey, respondents confirmed they were current residents and lived in Juneau in summer 2023.

The survey sample was randomly drawn from an appropriate mix of cell and landline numbers purchased from Dynata, a national supplier of survey samples. Surveys were completed with 517 randomly selected Juneau residents. The survey was conducted between October 24 and November 7, 2023.

The maximum margin of error at the 95% confidence level is $\pm 4.3\%$ for the full sample; this margin of error increases for subsamples.

The survey sample was compared to Juneau's adult population by gender, age, and area of residence. There was some disparity between the survey sample and the population in terms of area of residence. For example, residents who live in Salmon Creek, Lemon Creek, or Switzer Creek represent 16% of the population, compared to 10% of the survey sample; and Downtown/Thane residents represent 11% of the population, compared to 15% of the survey sample. Survey data was therefore weighted by neighborhood in order to maximize representativeness.

As with most random telephone surveys, residents in the oldest age groups were more likely to participate than residents in the youngest age groups; survey data was further weighted by age.

See table, next page

Table 1. Telephone Survey Sample versus Juneau Population

	Survey Sample (%)	Juneau Population (%)
Gender		
Male	50	51
Female	44	49
Unknown	6	-
Area of Residence		
Mendenhall Valley	43	46
Salmon Creek/Lemon Creek/Switzer Creek	10	16
Douglas/West Juneau	15	12
Downtown/Thane	15	11
Brotherhood Bridge/Out the Road	12	10
North Douglas	5	5
Other	1	-
Age		
18-24	7	10
25-34	16	20
35-44	17	17
45-54	17	17
55-64	20	18
65-74	15	12
75+	8	5

Sources: U.S. Census for age and gender; CBJ for neighborhood.

Survey data was also tested for differences by neighborhood of residence, neighborhood of employment, age group, gender, and whether a household member was employed in the tourism industry. Statistically significant differences between subgroups are addressed in the text accompanying each table.

COMPARISON WITH PAST SURVEYS

This report presents comparisons with results from similar surveys conducted in 1995, 1998, 2002, 2006, 2021, and 2022. Changes in question wording, where applicable, are noted.

The following cruise passenger volumes provide context for the trend analysis. Juneau's cruise passenger volume more than tripled between 1995 and 2023 (+339%). The latest season saw a 43% increase. Note that the 2021 survey referred to the 2019 season (the 2020 and 2021 seasons were heavily impacted by the COVID-19 pandemic).

Table 2. Juneau Cruise Passenger Volumes in Survey Years

	Cruise Passenger Volume	% Change
1995	380,600	-
1998	568,500	+49%
2002	741,500	+30%
2006	951,400	+28%
2019*	1,305,700	+37%
2022	1,167,000	-11%
2023	1,670,000	+43%
Change 1995-2023		+339%

*The 2021 survey referred to 2019 cruise volume.

Visitor Industry Impacts

Overall Impact of Visitor Industry

Respondents were asked to characterize overall visitor industry impacts on their household as positive, negative, both positive and negative, or no impact. Nearly half of respondents (46%) said they experienced both negative and positive impacts. Nearly one-third (31%) said the overall impacts were positive, while 11% said the overall impacts were negative. Another 11% said they experienced no impact at all.

This question yielded only two statistically significant differences by subgroup.

- The only difference by area of residence was a higher likelihood among Valley and Creeks residents to report no impacts at all at 15% and 12%, respectively. This compares with between 6% and 8% among other residents.
- Younger residents (18-34 years) were less likely to report negative impacts at 7%; this compares with 12% of middle-aged residents (35-54 years) and 14% of those 55 and older.

Table 3. Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?

n=515	% of Total
Positive impact	31
Negative impact	11
Both negative and positive impacts	46
No impact at all	11
Don't know	<1

Comparing to Past Surveys

The wording of this question has changed slightly over the years, although there were no changes between 2022 and 2023. In 2021 the question was *Thinking back to 2019, the last regular visitor season before COVID, do you feel the visitor industry had an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?* In prior years, the question was *Considering the costs and benefits of tourism, do you feel that the current level of tourism in Juneau has a positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?*

Those reporting positive impacts went from 35% in 2022 to 31% in 2023, while those reporting negative impacts increased from 7% to 11%. Neither of these changes were statistically significant. The shift in those reporting both positive and negative impacts over the three last years, from 33% to 41% to 46%, was significant, as was the drop in those reporting no impacts, from 20% to 16% to 11%.

Table 4. TREND: Positive Versus Negative Impacts, 1998, 2002, 2006, 2021, 2022, 2023 (%)

	1998	2002	2006	2021	2022	2023	Change 2022-23
Positive impact	29	40	40	36	35	31	-4
Negative impact	10	6	8	8	7	11	+4
Both negative and positive impacts	43	37	34	33	41	46	+5
No impact at all	16	15	17	20	16	11	-5
Don't know	1	1	1	2	1	<1	<1

Follow-up for “Both Positive and Negative” Impacts

Respondents who had cited both negative and positive impacts were asked a follow-up question, whether the positive impacts outweighed the negative or vice versa. The most common response was “the positive outweighs the negative” at 38%; 25% said the reverse; and 30% said neither/neutral.

Table 5. Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?

Base: “Both positive and negative impacts”

n=240	% of Base
Positive impacts outweigh negative	38
Negative impacts outweigh positive	25
Neutral/neither	30
Don't know	4
Refused	3

Comparing to Past Surveys

Respondents saying the positive outweighs the negative dropped from 49% in 2022 to 38% in 2023, while those saying the negative outweighs the positive also dropped, from 32% to 25%, although the latter shift was not statistically significant. The biggest change was in those saying neutral or neither: from 12% in 2022 to 30% in 2023.

Table 6. TREND: Weighing Both Positive and Negative Impacts, 1998, 2002, 2006, 2021, 2022, 2023 (%)

	1998	2002	2006	2021	2022	2023	Change 2022-23
Positive impacts outweigh negative (1998-2006: benefits outweigh costs)	45	46	47	51	49	38	-11
Negative impacts outweigh positive (1998-2006: costs outweigh benefits)	32	29	32	30	32	25	-7
Neutral/neither	16	16	14	14	12	30	+18
Don't know	6	8	7	4	5	4	-1

Composite Results

When combining results of the previous two questions, nearly half of respondents (48%) felt that either tourism has an overall positive impact on their household, or the positive impacts outweigh the negative. Nearly one-quarter (22%) felt that either tourism has an overall negative impact on their household, or the negative impacts outweigh the positive.

- Respondents reporting a household member employed in the tourism industry in the last five years were more likely to report (composite) positive impacts at 62%; this compares to 45% of other respondents.

Table 7. Combined Results: Overall Impacts + Both Positive/Negative Impacts

N=514	% of Total
Positive TOTAL	48
Positive impact	31
Both; positive impacts outweigh negative	17
Negative TOTAL	22
Negative impact	11
Both; negative impacts outweigh positive	11
No impact at all	11
Neutral/neither	14
Don't know	4

Comparing to Past Surveys

The only statistically significant differences in composite results over the last three years were the decrease in “no impact at all” (from 20% in 2021 to 16% in 2022 to 11% in 2023) and the increase in “neutral/neither” (from 5% in 2021 and 2022 to 14% in 2023).

Table 8. Combined Results: Overall Impacts + Both Positive/Negative Impacts

	2021	2022	2023	Change 2022-23
Positive TOTAL	53	55	48	-7
Positive impact	36	35	31	-4
Both; positive impacts outweigh negative	17	20	17	-3
Negative TOTAL	18	20	22	+2
Negative impact	8	7	11	+4
Both; negative impacts outweigh positive	10	13	11	-2
No impact at all	20	16	11	-5
Neutral/neither	5	5	14	+11
Don't know	4	4	4	-

Types of Impacts

Types of Impacts Affecting Households

Respondents were read eight different types of visitor-related impacts and asked to characterize how much each impact affected their household. Respondents reported the highest degree of impact with *crowding at Mendenhall Glacier*, with 41% very affected and 22% somewhat affected, for a total of 63% affected. The next most impactful was vehicle congestion downtown, with 28% very affected and 33% somewhat affected, for a total of 61% affected. Least impactful was *air emissions from cruise ships*: 14% reported being very affected and 22% somewhat affected, for a total of 36% affected.

Differences by neighborhood of residence and employment are shown in the following pages. There only a few other statistically significant differences by subgroup.

- Younger respondents were less likely to be somewhat/very affected by *vehicle congestion outside of downtown*: 9% versus 18% of middle-aged respondents and 14% of older respondents. They were also less likely to be somewhat/very affected by *flightseeing noise*: 36% versus 43% of middle-aged respondents and 49% of older respondents.
- Those reporting tourism employment among household members were more likely to be somewhat or very affected by *crowding at Mendenhall Glacier* (73% versus 60% of other respondents).

Table 9. For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023? By "affected" we mean changing your use of an area in addition to other kinds of impacts. (%)

n=511 to 517	Very affected	Somewhat affected	Very + Somewhat Affected	Not affected	Don't know
Crowding at Mendenhall Glacier	41	22	63	36	1
Vehicle congestion downtown	28	33	61	39	<1
Crowding on sidewalks downtown	36	23	59	40	1
Whale watching boat traffic and wakes	30	17	47	50	3
Vehicle congestion outside of downtown	14	31	45	55	<1
Flightseeing noise	18	25	43	57	1
Crowding on trails	15	25	40	59	1
Air emissions from cruise ships	14	22	36	60	4

Differences by Neighborhood

A few impacts showed differences in responses according to the respondents' neighborhood.

- Residents of Downtown/Thane and North Douglas were the most likely to be somewhat/very affected by *vehicle congestion downtown* at 75% for both neighborhoods, followed by Out the Road (67%), Douglas/West Juneau (65%), Valley (56%), and Creeks (53%).
- North Douglas residents were the most likely to be somewhat/very affected by *crowding on sidewalks downtown* (83%) followed by Downtown/Thane (68%), Douglas/West Juneau (65%), Out the Road (62%), Creeks (60%), and Valley (52%).
- North Douglas and Out the Road residents were the most likely to be somewhat/very affected by *whale watching boat traffic and wakes* at 66% and 63%, respectively; this compares with 48% of Douglas/West Juneau, 47% of Valley, 43% of Downtown/Thane, and 35% of Creeks.
- Valley residents were least likely to be somewhat/very affected by *flightseeing noise* at 36%; this compares with between 47% and 51% in other areas.
- Downtown/Thane and Douglas/West Juneau residents were the most likely to be somewhat/very affected by *air emissions from cruise ships* at 52% and 47%, respectively. This compares with 41% of North Douglas, 39% of Out the Road, 32% of Valley, and 26% of Creeks residents.

**Table 10. IMPACTS BY NEIGHBORHOOD OF RESIDENCE:
"Very affected" plus "Somewhat affected" (%)**

	Downtown/ Thane n=75	Douglas/ West Juneau n=76	Creeks n=55	Mend. Valley n=224	North Douglas n=26	Out the Road n=61
Crowding at Mendenhall Glacier	56	66	69	60	67	66
Crowding on sidewalks downtown	68	65	60	52	83	62
Vehicle congestion downtown	75	65	53	56	75	67
Flightseeing noise	47	47	50	36	49	51
Air emissions from cruise ships	52	47	26	32	41	39
Vehicle congestion outside of downtown	42	47	41	42	53	54
Whale watching boat traffic and wakes	43	48	35	47	66	63
Crowding on trails	40	45	38	38	49	37

A few impacts showed differences in responses according to where the respondent worked. Note that the sample sizes of those working in Douglas/West Juneau, North Douglas, and Out the Road were too small for analysis.

- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *vehicle congestion downtown* at 70%; this compares with 61% of those working in the Valley and 47% of those working in the Creeks area.
- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *crowding on sidewalks downtown* at 66% versus 59% of those working in the Valley and 45% of those working in the Creeks area.
- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *air emissions from cruise ships* at 49% versus 36% of those working in the Valley and 24% of those working in the Creeks area.

**Table 11. IMPACTS BY NEIGHBORHOOD OF EMPLOYMENT:
"Very affected" plus "Somewhat affected" (%)**

	Downtown/ Thane n=121	Creeks n=40	Mend. Valley n=94
Crowding at Mendenhall Glacier	65	61	63
Crowding on sidewalks downtown	66	45	59
Vehicle congestion downtown	70	47	61
Flightseeing noise	47	31	36
Air emissions from cruise ships	49	24	36
Vehicle congestion outside of downtown	43	42	49
Whale watching boat traffic and wakes	39	46	52
Crowding on trails	42	41	38

Comparing to Past Surveys

The wording of this question was adjusted slightly between 2022 and 2023. The following phrase was added after the question: *By "affected" we mean changing your use of an area in addition to other kinds of impacts.* This phrase was added because in 2021 and 2022, respondents sometimes expressed confusion on whether avoiding an area due to visitors would be considered "affected."

The most recent survey showed the highest rates of somewhat/very affected in six out of eight categories compared to 2021 and 2022. There were several statistically significant changes.

- Those somewhat/very affected by *vehicle congestion downtown* increased from 51% in 2022 to 61% in 2023.
- Those somewhat/very affected by *crowding at Mendenhall Glacier* increased from 57% in 2022 to 63% in 2023.
- Those somewhat/very affected by *whale watching boat traffic and wakes* increased from 40% in 2022 to 47% in 2023.
- Although not shown in the table below, those very affected by *crowding on sidewalks downtown* increased from 30% in 2022 to 36% in 2023.
- Although not shown in the table below, those very affected by *air emissions from cruise ships* dropped from 23% in 2022 to 14% in 2023.

Table 12. TREND: Somewhat + Very Affected, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022-23
Crowding at Mendenhall Glacier	57	57	63	+6
Crowding on sidewalks downtown	57	56	59	+3
Vehicle congestion downtown	57	51	61	+10
Flightseeing noise	41	46	43	-3
Air emissions from cruise ships	36	42	36	-6
Vehicle congestion outside of downtown	36	42	45	+3
Whale watching boat traffic and wakes	41	40	47	+7
Crowding on trails	34	38	40	+2

CBJ Tourism Management

Overall Management

When asked whether CBJ is doing enough to manage the impacts of the visitor industry, respondents were most likely to say they were *not doing enough* (56%) followed by *just the right amount* (33%). Only 4% said they were doing *more than enough*, and 7% didn't know.

- Residents of North Douglas, Downtown/Thane, and Douglas/West Juneau were more likely to say CBJ was *not doing enough* at 70%, 67%, and 65%, respectively; this compares with 57% of Out the Road residents, 52% of Valley residents, and 47% of Creeks residents.
- Those working in Downtown/Thane were more likely to say CBJ was *not doing enough* at 62%; this compares with 51% of those working in the Valley and 42% of those working in the Creeks area.

Table 13. Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?

n=516	% of Total
More than enough	4
Not enough	56
Just the right amount	33
Don't know	7

Comparing to Past Survey

The percentage of respondents saying CBJ is *not doing enough* increased from 45% in both 2021 and 2022 to 56% in 2023, while those saying they were doing *just the right amount* fell from 41% in 2022 to 33% in 2023.

Table 14. TREND: CBJ Tourism Management, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022-23
More than enough	7	4	4	-
Not enough	45	45	56	+11
Just the right amount	39	41	33	-8
Don't know	9	10	7	-3

Cruise Ship Limitations

A new question in the 2023 survey asked respondents their preference for future cruise passenger volume in Juneau. The full question read:

Earlier this year CBJ and the cruise industry agreed to a limit of five large ships per day. As a result, cruise passenger volume is projected to flatten over the next two years. What is your preference for future cruise passenger volume in Juneau?

One-half of respondents (50%) said they wanted future cruise passenger volume in Juneau to be lower, including 31% who wanted it slightly lower and 19% who wanted it much lower. Eleven percent said they wanted volume to be higher, including 8% who wanted it slightly higher and 3% who wanted it much higher. One-third of respondents (33%) wanted to keep volume the same, while 4% had no opinion.

- Valley and North Douglas residents were the least likely to say they wanted volume to be lower at 42% and 46%, respectively. This compares with 55% of Out the Road residents, 56% of Downtown/Thane residents, 57% of Douglas/West Juneau residents, and 64% of Creeks residents.
- Women were more likely to say they wanted volume to be lower at 61%, compared with 43% of men.

Table 15. What is your preference for future cruise passenger volume in Juneau?

n=517	% of Total
Keep it the same	33
Higher TOTAL	11
Much higher	3
Slightly higher	8
Lower TOTAL	50
Slightly lower	31
Much lower	19
No opinion	4
Don't know	1

Tourism Best Management Practices

TBMP Awareness

Respondents were asked how familiar they were with the Tourism Best Management Practices (TBMP) program. A majority of respondents (62%) were not familiar; 22% were somewhat familiar; and 14% were very familiar.

- Downtown/Thane and North Douglas residents were the most likely to be somewhat or very familiar at 53% and 55%, respectively; this compares with 49% of Out the Road residents, 42% of Douglas/West Juneau residents, 30% of Valley residents, and 26% of Creeks residents.
- Younger respondents were less likely to be somewhat or very familiar at 19%; this compares with 37% of middle-aged respondents and 48% of older respondents.

Table 16. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. It includes a hotline for reporting concerns about tourism. Are you very familiar, somewhat familiar, or not familiar with this program?

n=517	% of Total
Very familiar	14
Somewhat familiar	22
Not familiar	62
Don't know/refused	1

Comparing to Past Survey

Those not familiar with TBMP increased from 54% in 2021 to 57% in 2022 to 62% in 2023.

Table 17. TREND: CBJ Tourism Management, 2021, 2022, 2023 (%)

	2021	2022	2023	Change 2022-23
Very familiar	14	16	14	-2
Somewhat familiar	32	26	22	-4
Not familiar	54	57	62	+5

TBMP Effectiveness

Among those somewhat or very aware of TBMP, 15% said the program was very effective; 49% said it was somewhat effective; and 27% said it was not effective.

Table 18. Do you think this program has been very effective, somewhat effective, or not effective at managing tourism impacts on residents? (%)

Base: Somewhat or very familiar with TBMP

n=205	% of Base
Very effective	15
Somewhat effective	49
Not effective	27
Don't know/not aware	9

Comparing to Past Survey

The percentage of respondents saying TBMP was not effective increased from 15% in 2022 to 27% in 2023.

The 2021 question was more detailed, asking respondents to rate TBMP's effectiveness on three factors, rather than overall, preventing inclusion in the trend analysis.

Table 19. TREND: Effectiveness of TBMP, 2022, 2023 (%)

	2022	2023	Change 2022-23
Very effective	17	15	-2
Somewhat effective	52	49	-3
Not effective	15	27	+12
Don't know/not aware	16	9	-7

Tourism Initiatives

CBJ Tourism Department Priorities

Respondents were asked what level priority should be placed on seven different CBJ tourism activities. The highest-rated priorities were *reducing traffic congestion* (42% said this should be high priority), *shore power* (40%) and *supporting Travel Juneau in growing the independent visitor market* (39%). *Extending the Seawalk* (25% high priority) and *renovating Centennial Hall* (22%) received a lower priority rating.

- North Douglas residents were the most likely to place a high priority on *supporting Travel Juneau in growing the independent visitor market* at 60%; this compares with 48% of Creeks residents, 38% of Out the Road residents, 37% of Valley residents, 33% of Douglas/West Juneau residents, and 30% of Downtown/Thane residents.
- North Douglas residents were the most likely to place a high priority on *renovating Centennial Hall* at 38%; this compares with 24% of Valley residents, 21% of Creeks and Downtown/Thane residents, 15% of Out the Road residents, and 13% of Downtown/West Juneau residents.
- Out the Road residents were the most likely to place a high priority on *managing impacts from tours on residents throughout the Borough* at 53%; this compares with 46% of North Douglas residents, 37% of Creeks and Valley residents, 34% of Douglas/West Juneau residents, and 30% of Downtown/Thane residents.
- Creeks residents were the least likely to place a high priority on *further limiting cruise ship volume* at 25%; this compares with 32% of Valley residents, 35% of Downtown/Thane residents, 41% of Douglas/West Juneau residents, 43% of Out the Road residents, and 45% of North Douglas residents.
- Older respondents placed a higher priority on *shore power*: 53% rated this as high priority, compared with 36% of middle-aged respondents and 27% of younger respondents. This pattern repeated for *reducing traffic congestion* (48%, 41%, 36%), *extending the Seawalk* (30%, 24%, 19%), *further limiting cruise ship volume* (43%, 32%, 26%), and *managing impacts from tours on residents throughout the Borough* (51%, 41%, 23%).

See table, next page

Table 20. Should the CBJ Tourism Department place a high priority, medium priority, or low priority on each of the following items? (%)

n=517	High Priority	Medium Priority	Low Priority	Not a priority	Don't know
Reducing traffic congestion	42	31	16	6	4
Shore power	40	27	18	7	8
Supporting Travel Juneau in growing the independent visitor market	39	29	19	8	4
Managing impacts from tours on residents throughout the Borough	38	28	21	7	4
Further limiting cruise volume	34	21	29	11	3
Extending the Seawalk	25	24	35	11	4
Renovating Centennial Hall to attract more conferences	22	26	29	18	5

When asked which priority was most important, the number one response was *managing impacts from tours on residents throughout the Borough* (23%) followed by *reducing traffic congestion* (18%) and *further limiting cruise volume* (15%).

- Valley residents were the most likely to select *reducing traffic congestion* at 21% while North Douglas and Out the Road residents were the least likely at 8% and 11%, respectively.
- Douglas/West Juneau residents were the mostly likely to select *shore power* at 24%; this compares to between 4% and 11% of other residents.

Table 21. Of the priorities I just mentioned, which one do you think is MOST important? (%)

n=517	% of Total
Managing impacts from tours on residents throughout the Borough	23
Reducing traffic congestion	18
Further limiting cruise volume	15
Shore power	11
Supporting Travel Juneau in growing the independent visitor market	10
Extending the Seawalk	8
Renovating Centennial Hall to attract more conferences	5
Don't know	8

Comparing to Past Survey

Because several priorities were changed between 2022 and 2023, and the category “not a priority” was added to the list of options, no comparison of 2023 results can be made to past years.

Seasonality

A new question in 2023 asked respondents for their level of support/opposition to the lengthening of the cruise season into April and October. Nearly one-half (48%) said they were supportive, including 12% very supportive; 41% were opposed, including 14% very opposed; and 9% had no opinion.

- Valley residents were the most likely to be supportive at 53%; Downtown/Thane were the least supportive at 39%.
- Those who work in the Valley were the most likely to be supportive at 63%; this compares with 51% of those working in the Creeks area and 38% of those working in Downtown/Thane.

Table 22. In recent years the cruise ship season has become longer, lasting from mid-April to mid-October in 2023. Are you very supportive, supportive, opposed, or very opposed to cruise ships arriving in April and October? (%)

n=517	% of Total
Supportive TOTAL	48
Very supportive	12
Supportive	36
Opposed TOTAL	41
Opposed	27
Very opposed	14
No opinion	9
Don't know	2

Visitor Distribution

Respondents were slightly more likely to agree with the statement *CBJ should work to keep visitors concentrated in areas developed for tourism* (40%) than to agree with *CBJ should work to spread visitors throughout the Borough* (34%). One-quarter (26%) said neither, or they didn't know.

- Valley residents were the most likely to agree with *CBJ should work to keep visitors concentrated in areas developed for tourism* at 45%; North Douglas residents were the least likely at 27%.

Table 23. Which of the following statements best reflects your opinion? (%)

n=517	% of Total
CBJ should work to keep visitors concentrated in areas developed for tourism	40
CBJ should work to spread visitors throughout the Borough	34
Neither/don't know	26

Comparing to Past Survey

The percentage of respondents choosing *CBJ should work to spread visitors throughout the Borough* went down from 42% in 2022 to 34% in 2023, while the percentage saying "neither/don't know" increased from 16% to 26%.

Table 24. TREND: Visitor Distribution (%)

	2022	2023	Change 2022-23
CBJ should work to keep visitors concentrated in areas developed for tourism	42	40	-2
CBJ should work to spread visitors throughout the Borough	42	34	-6
Neither/don't know	16	26	+10

Tourism Employment

One-fifth of respondents (20%) said that they or a member of their household had been employed in the Juneau tourism industry sometime in the past five years.

Table 25. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?

n=513	% of Total
Yes	20
No	80

Among those reporting a household member employed in tourism, the average number of household members employed in tourism was 1.6 people.

Table 26. How many people?
Base: Household member employed in tourism

n=101	% of Base
1	66
2	24
3	4
4+	5
Average	1.6 people

Comparing to Past Surveys

The percentage of people saying a household member was or had been employed in tourism decreased from 38% in 2022 to 20% in 2023, while the average number of household members employed increased from 1.8 to 1.6.

Note that in the 2002 and 2006 surveys, the length of time was two years rather than five years.

**Table 27. TREND: Household Member Employed in Juneau Tourism
2002, 2006, 2021, 2022, 2023**

	2002 Past 2 years	2006 Past 2 years	2021 Past 5 years	2022 Past 5 years	2023 Past 5 years	Change 2022-23
Household member employed	21%	23%	32%	38%	20%	-18%
Average number	1.4 people	1.4 people	1.5 people	1.8 people	1.6 people	-0.2 people

Respondent Characteristics

The tables in this section show unweighted data to accurately reflect sample characteristics. (All survey data in the preceding tables was weighted by age and neighborhood of residence; please refer to Methodology section for more detail on weighting.)

Respondents were most likely to live in the Mendenhall Valley (43%) followed by Downtown/Thane (15%), Douglas/West Juneau (15%), Brotherhood Bridge/Out the Road (12%), Salmon Creek/Lemon Creek/Switzer Creek (10%), and North Douglas (5%).

Respondents who reported being employed were most likely to work in Downtown/Thane (34%) followed by the Valley (26%) and Borough-wide (13%).

**Table 28. In which area of the City and Borough do you live? (All Respondents)
In which area of the City and Borough do you work? (Base: Employed)
UNWEIGHTED**

	n=517 LIVE % of Total	n=359 WORK % of Those Employed
Mendenhall Valley	43	26
Downtown/Thane	15	34
Douglas/West Juneau	15	3
Brotherhood Bridge/Out the Road	12	5
Salmon Creek/Lemon Creek/Switzer Creek	10	11
North Douglas	5	2
Outside of city	n/a	5
Borough-wide	n/a	13
Don't know/refused	1	1

**Table 29. Are you currently employed?
UNWEIGHTED**

n=517	% of Total
Yes	69
No	29
Don't know/refused	1

Respondents were about half male (50%) and half female (44%). Note that gender was not asked directly of respondents; surveyors made assumptions based on voice, resulting in 6% “don’t know” responses.

**Table 30. Gender
UNWEIGHTED**

n=517	% of Total
Male	50
Female	44
Don't know	6

Respondents reported an average age of 51 (only adults over 18 were eligible); the most common age group was 55 to 64 (20%).

**Table 31. Age
UNWEIGHTED**

n=499	% of Total
18-24	7
25-34	16
35-44	17
45-54	17
55-64	20
65-74	15
75+	9
Average age	51 years old

Respondent Comments

While respondents were not asked directly to provide comments, interviewers were instructed to record comments when they were offered.

Main Themes

Transportation and Traffic Issues:

- Request for additional city buses during tourist season
- Addressing crowded driving downtown
- Overcrowding on city buses affecting locals' commutes
- Traffic congestion from tour buses and vehicles

Housing and Infrastructure:

- Concerns about housing for residents and workers in the tourism industry
- Infrastructure development for housing and better public transportation

Environmental Concerns:

- Waste management, pollution, and environmental impact from cruise ships
- Noise pollution from helicopters, boats, and cruise ships
- Impact on wildlife, especially whales

Economic and Social Impact:

- Taxation issues affecting locals and businesses
- Unequal distribution of economic benefits among locals and non-resident business owners
- Disruption of daily life for locals during tourist seasons

Tourist Experience and Management:

- Suggestions to regulate and limit the number of tourists and vessels
- Balancing the needs of tourists and locals for a better quality of life
- Diversifying tourist activities to include more local experiences

Government Management and Priorities:

Criticism of CBJ's management and handling of tourism-related issues
Prioritizing locals' needs over the tourism industry

Miscellaneous Concerns and Suggestions:

Specific complaints about noise, congestion, waste, and other nuisances caused by tourism
Concerns about the focus on tourism over the well-being of residents

Verbatim Comments

- Add additional city buses during tourist season.
- Address the crowded driving downtown.
- Address the housing for people.
- Appreciate the shoulder seasons for helping local business and volume is low enough not be a major impact on residents.
- April through October timeline is fine for cruise ships but they should not increase number of passengers during that time. Keep the number of passengers with a longer period of time to alleviate effects on community.
- Apartments owned by Diamond International in Douglas are slumlords with junked cars, etc. If they own buildings they should be cleaned up and up the standards of the neighborhood.
- Be considerate to locals and not cater to the tourists.
- Bike tours are dangerous.
- Build a new floating dock specifically for charter boats.
- Capitol buses overloaded with tourists.
- Cargo docks need to be past the yacht club.
- CBJ are not managing the congestion and waste dumping from vessels or people flooding downtown.
- CBJ does too much to manage impacts of tourism industry. CBJ should not be a function of the tourist industry.
- CBJ is not paying attention to the sanitation of too many people that are coming in.
- CBJ needs to address the broad-band bottleneck when ships are in.
- CBJ needs to address the taxes placed on locals.
- CBJ needs to have better management of the tourist industry.
- CBJ needs to keep the trash cans and restrooms open for locals.
- CBJ needs to manage the money better. Give more to the locals.
- CBJ needs to recognize small business not related to tourism.
- CBJ should increase head tax from visitors.

- CBJ should spread the tourists throughout the borough to benefit businesses owned by locals. Downtown businesses are owned by out-of-towners and therefore the local economy does not benefit as much as that money goes out of state.
- CBJ track pathogens through wastewater, cruise ships are a primary vector of introducing diseases into our community and thinks DOH need to help manage the impacts of these diseases into the city. This is an unquantified impact on our community.
- Cell service does not work when ships are docked. The extension of the season from April-October is okay if they keep current number of passengers. There should be discussion on head tax to use funds to better Juneau's infrastructure like cell service.
- Citizens of Juneau have become second class citizens, tourists take precedence, not a good thing. Moving homeless to the valley so as not to upset the tourists was not a good thing.
- City buses overcrowded with tourists, no room for locals to get to work.
- City council take into consideration locals when planning.
- City needs to use money from cruise tax to pay for police and infrastructure to improve and relieve current situation.
- Concentration of everything downtown is negative: spread it out.
- Cruise ship passenger volume should be taken into consideration, not number of ships. Ships today hold over 5,000 passengers now.
- Cruise ships clog up channel 16, the marine channel, and they need to decrease their use of it. Commercial fishing is shut out and there is too much emphasis on tourist industry.
- Cruise ships should not be allowed to dump their trash in Juneau as waste management has had to raise premiums for residents.
- Cruise volume should go up as docks expand to the Seawalk. More studio apartments should be built for seasonal tourists and industry employees.
- Cut back the taxes placed on locals and their businesses.
- Cut the number of boats in half. There are 30 boats by the whales. Locals can't do their fishing.
- Decongest downtown with smaller buses, spread people out more.
- Develop infrastructure for people who need a place to live while working here.
- Do not stop the folk festival to renovate centennial hall.
- Do something about tourists riding local buses. Locals cannot get on buses to get to work.
- Does not agree with locals having to pay to go to the glacier.
- Does not care what the industry does.
- Does not support the tourist industry at all.
- Downtown area is full of tourists, pricing out locals.
- Enjoys and supports tourism. She is a frequent tourist herself in other places.

- Expose tourists to more Native-related activities.
- Five cruise ships is not a limitation, all they do is get more passengers. They must cap the number of passengers.
- Flightseeing noise must be addressed. Too many helicopters and plane noise especially for boaters on the water in local areas.
- Happy we are conducting this survey.
- He is a customs officer and would not be employed if not for tourism.
- Helicopter noise
- Housing
- I don't go downtown except for work during cruise ship season.
- If the money is staying in Juneau, fine. If not, limit the people coming in.
- JPD should be downtown watching people parking in yellow lines.
- Juneau is being run over with tourists.
- Juneau is too focused on tourists and needs to focus on year-round residents.
- Keep buses off small streets above 4th street.
- Less tourism
- Limit on number of whale watch ships. Very bothered by number of helicopters. Bothered by increased traffic on back-loop. Bothered by amount of bus traffic using the Statter harbor parking lot. Shocked by the amount of pollution from the large cruise ships. Irritated that ships reduced to five but not the number of people.
- Limit the boat volume and the people.
- Limit the passengers on board, put permits on passengers. Limit the number of boats.
- Local people missed work because they could not get on the bus because it was crowded with tourists.
- Local phone service affected (i.e. dropped calls, no texts or calls received or sent or no service at all).
- Lowering property tax is more important than tourist industry.
- Manage better vessels coming in.
- Manage the congestion of large tour buses, vans, etc. Place in smaller vehicles.
- Manage the people, big distrust in CBJ.
- Managing the people coming to the hospital for non-threatening injuries. Need to tell them about Urgent care.
- More and better public transportation needs to be addressed.
- More docks for more ships. Eco-friendly way to move tourists out of downtown.
- More usage of hydropower so as not to drain the electricity from the town.
- More use of other fuels for tour buses.
- Need better infrastructure for walking and moving around the area.
- Need clarification on environmental effects to the oceans!
- Need more and better public transportation (x2).
- Need more parking.

- Need to have a fee to see Juneau.
- Need to regulate speed for the whale watchers and cut back on the amount of boats.
- No more docks in downtown.
- Not enough city buses, so crowded locals couldn't get to work. The tourism industry should be involved with used buses or something.
- Not enough housing, housing should come first.
- Not enough parking downtown.
- Not enough transportation to the glacier.
- Overcrowding on city buses.
- Overcrowding from whale watch tours and environmentally destructive boat wakes.
- Permits on passengers.
- Please make survey questions related to how people really think of this industry.
- Poor management of CBJ not giving detailed information for the public.
- Property taxes are too high.
- Public buses have too many tourists.
- Public transportation is too crowded for locals to ride during cruise ship arrivals.
- Public transportation needs to be addressed because locals dependent on it suffer during tourist times.
- Questions are confusing. Not enough information.
- Questions are confusing: extend the sidewalk to where? What's limiting the cruise volume?
- Questions are leading. Not what people want to know.
- Raise sales tax during tourist season to pay for road maintenance.
- Re: traffic congestion, no more roundabouts.
- Reduce the number of tourists and keep them concentrated in tourist areas.
- Reduce whale watchers.
- Regulate the dumping from the vessels and hitting the whales.
- Regulate the number of people coming to Juneau. Place visas on them.
- Regulating of dumping waste, from the vessels here in Juneau.
- Residents are neglected at expense of tourists.
- Review potential impact to power grid before giving them power.
- Southeast Alaska depends on tourism. We should encourage growth. Put a dock on the backside of Douglas Island.
- Selling the city to Norwegian cruise ships.
- She liked that ethnicity and income were not asked in this survey.
- She would rather a question on fecal matter being released into Juneau waters.
- She is in her 80s and loves the ships coming in.
- Ship passenger limit should coincide with the number of passenger the tours and buses can handle.
- Ships in April okay, not in October.

- Ships should be distributed more evenly throughout the week.
- Should limit the people at the glacier.
- Spread out the arrival and departure of ships.
- Stop garbage dumping of the ships.
- Stop letting shops on Franklin put out their garbage the night before pickup. The bears are making a terrible mess for city workers to clean up.
- Stop unnecessary blowing of horns on ships.
- Suggest the tourists take their own tour buses rather than the local bus system that the locals are using.
- Supplying housing for the people who work the tourist trade should be a priority for the city.
- Sustainable electric and hydro use.
- Tear down JACC and Centennial Hall and build one better building.
- The changes made to regulate the noise in the downtown harbor worked! It is much better than it used to be. Closing the waterfront to citizens was horrible and it should be reversed.
- The city seems more interested in the money than the impact on citizens.
- The independent visitor is an important sector but they have impacts on our local housing situation.
- The internet usage needs to be additional; the locals cannot use the services when cruise ships are in port.
- The October cruise schedule is a bit too wet and risky for weather and shops are closed.
- The priority should be the homeless.
- The roads in town are horrible. They should be addressed before the tourism question.
- The tour companies should hire locals to work locally, not bring in people from outside just for the season.
- The transit system is over-run in the summer with tourists and locals cannot get on to ride.
- There needs to be a balance. Need to make sure that visitors are getting a genuine experience and not a Disney experience. Cruise ship is a hazard and a risk where they get a mickey mouse experience. Quality of experience is diminished when cruise ships are involved.
- There should be more transportation for crew members.
- There should be only three or four days a week there are tour ships in, not every day.
- To limit the number of passengers coming to Juneau.
- Too many people and ships...too much!
- Too many people at the glacier and downtown.
- Too many people!

- Too many people, not enough infrastructure.
- Too many whale boats (over 50) non-stop all day.
- Too many whale boats in Auke Bay harbor.
- Tour industry should pay for installing electric power to ships.
- Tour ships should not be allowed to use the landfill.
- Tourists filled local buses so residents could not get to work.
- Tourists in April are fine but bringing them in late October seems unfair to the tourists as the weather is crummy.
- Tourists put pressure by Airbnb on Juneau housing market now running 145% above national average.
- Regular trails need better demarcation and tourists need to be kept from wandering through woods.
- Traffic congestion was city's fault and not tourism with the single lane that went into downtown.
- Travel Juneau should be focused on locals.
- Very upset about tourism.
- Vessel traffic on the water and the dumping.
- Volume is the problem for both residents and visitors.
- We need more hotels.
- We need to bring as much business with tourists as possible to recover from no business for two years. We can level out and reduce the number of tourists and ships later.
- Whale tours are obnoxious to recreational boaters. TBMP minimizes any complaints.
- Whale watching should be out of North Douglas.
- What is the head tax being used on? There is a lot of litter by the whale statue and why do they not hire someone to clean up?
- Witnessed harassment of whales by tours.
- Worry about the health of whales from the whale watching tours. The CBJ opinion survey about the number of cruise ships had loaded questions skewed to the answer CBJ wanted.
- Would be nice to have at least one day each week with far less tourist volume.
- Would like to see fewer visitors to provide a better quality of experience.
- Year-round residents need to be taken into account more so than those who own businesses and are not year-long residents. Too much emphasis is on tourist experience and oftentimes the awful locals' experience is not taken into account when deciding on these things.

Survey Instrument

See attached.

Juneau Community Visitor Industry Survey 2023

Hello, this is _____ with McKinley Research. We are doing a study for CBJ asking Juneau residents their opinions about the visitor industry. Can I ask you a few questions?

1. **Do you currently live in Juneau?** 01 Yes 02 No [thank and end survey]

2. **Did you live in Juneau this past summer?** 01 Yes 02 No [thank and end survey]

3. **Do you feel the visitor industry has an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household? [Read 1-4]**
 - 01 Positive impact (skip to Q5) 04 No impact at all (skip to Q5)
 - 02 Negative impact (skip to Q5) 05 Don't know (skip to Q5)
 - 03 Both (ask 4) 06 Refused (skip to Q5)

4. **Do you feel the positive impacts outweigh the negative impacts or do the negative impacts outweigh the positive impacts?**
 - 01 Positive impacts outweigh negative
 - 02 Negative impacts outweigh positive 04 Don't know
 - 03 Neutral/neither 05 Refused

5. **For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023? By "affected" we mean changing your use of an area in addition to other kinds of impacts.**

	Very affected	Somewhat affected	Not affected	Don't Know	Refused
a. Vehicle congestion downtown	1	2	3	4	5
b. Vehicle congestion outside of downtown	1	2	3	4	5
c. Crowding on sidewalks downtown	1	2	3	4	5
d. Crowding on trails	1	2	3	4	5
e. Crowding at Mendenhall Glacier	1	2	3	4	5
f. Whale watching boat traffic and wakes	1	2	3	4	5
g. Flightseeing noise	1	2	3	4	5
h. Air emissions from cruise ships	1	2	3	4	5

6. **Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?**
 - 01 More than enough
 - 02 Not enough 04 Don't know
 - 03 Just the right amount 05 Refused

7. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. It includes a hotline for reporting concerns about tourism. Are you very familiar, somewhat familiar, or not familiar with this program?

- 01 Very familiar
- 02 Somewhat familiar
- 03 Not familiar (skip to Q9)
- 04 DK/Refused (skip to Q9)

8. Do you think this program has been very effective, somewhat effective, or not effective at managing tourism impacts on residents?

- 01 Very effective
- 02 Somewhat effective
- 03 Not effective
- 04 DK/Refused

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

9. What is your preference for future cruise passenger volume in Juneau? [Read 1-5]

- 01 Keep it the same
- 02 Slightly lower
- 03 Much lower
- 04 Slightly higher
- 05 Much higher
- 06 No opinion
- 07 Don't know
- 08 Refused

10. The next question is asking about priorities for the CBJ Tourism Department. Should they place a high priority, medium priority, low priority, or not a priority on each of the following items?

Rotate	High priority	Medium priority	Low priority	Not a priority	DK	Ref.
a. Shore power	1	2	3	4	5	6
b. Reducing traffic congestion	1	2	3	4	5	6
c. Extending the Seawalk	1	2	3	4	5	6
d. Further limiting cruise volume	1	2	3	4	5	6
e. Supporting Travel Juneau in growing the independent visitor market	1	2	3	4	5	6
f. Renovating Centennial Hall to attract more conferences	1	2	3	4	5	6
g. Managing impacts from tours on residents throughout the Borough	1	2	3	4	5	6

11. Of the priorities I just mentioned, which one do you think is MOST important? Enter letter _____
 01 Don't know 02 Refused

12. ENTER COMMENTS IF ANY OFFERED – DON'T ASK 01 No comment

13. In recent years the cruise ship season has become longer, lasting from mid-April to mid-October in 2023. Are you very supportive, supportive, opposed, or very opposed to cruise ships arriving in April and October?

- 01 Very supportive
- 02 Supportive
- 03 Opposed
- 04 Very opposed
- 05 No opinion
- 06 Don't know
- 07 Refused

14. Which of the following statements best reflects your opinion? (Read 1-2)

- 01 CBJ should work to spread visitors throughout the Borough **OR**
- 02 CBJ should work to keep visitors concentrated in areas developed for tourism
- 03 Neither/don't know

READ: I have a few last questions for demographic purposes.

15. In what year were you born? _____ [zero if refuse]

16. In which area of the City and Borough do you live?

- | | | |
|---|------------------------------------|----------------|
| 01 Downtown/Thane | 05 North Douglas | |
| 02 Douglas/West Juneau | 06 Brotherhood Bridge/out the road | |
| 03 Salmon Creek/Lemon Creek/Switzer Creek | 07 Don't know | |
| 04 Mendenhall Valley | 08 Refused | 09 Other _____ |

[If DK/refused: "Surveys without a response to this question may not get counted because we need to make sure we're surveying the right number of people from each area. Can you reconsider sharing your area?"]

17. Are you currently employed? 01 Yes 02 No (Skip to Q19) 03 Don't know/refused (Skip to Q19)

18. In which area of the City and Borough do you work?

- | | | |
|---|------------------------------------|----------------|
| 01 Downtown/Thane | 05 North Douglas | |
| 02 Douglas/West Juneau | 06 Brotherhood Bridge/out the road | |
| 03 Salmon Creek/Lemon Creek/Switzer Creek | 07 Borough-wide | |
| 04 Mendenhall Valley | 08 Outside of city | 10 Refused |
| | 09 Don't know | 11 Other _____ |

19. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?

- 01 No
- 02 Yes, How many people? # _____
- 03 Refuse

Thank you for participating in this important project! [end survey]

20. Record gender [don't ask] 01 Male 02 Female 03 Don't know

21. [Write additional comments only if shared]

22. Phone # _____ Survey # _____ Data entered initials _____

23. Interviewer Name _____ Date _____

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