



McKINLEY RESEARCH
GROUP, LLC

Formerly McDowell Group

JUNEAU TOURISM SURVEY

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PREPARED FOR:

City and Borough of Juneau

TABLE OF CONTENTS

Executive Summary	1
Introduction and Methodology	5
Visitor Industry Impacts	7
Overall Impact of Visitor Industry	7
Follow-up for “Both Positive and Negative” Impacts	8
Composite Results.....	9
Types of Impacts	10
Types of Impacts Affecting Households	10
CBJ Tourism Management	14
Overall Management	14
Cruise Ship Limitations	15
Tourism Best Management Practices	16
TBMP Awareness	16
TBMP Effectiveness	17
Tourism Markets and Initiatives	18
Tourism Markets	18
Public Transit Option for Visitors	19
CBJ Tourism Department Priorities	20
Visitor Distribution.....	22
Tourism Employment	23
Respondent Characteristics	25
Appendix	27
Responses to Open-Ended Question	27
Survey Instrument.....	36

Executive Summary

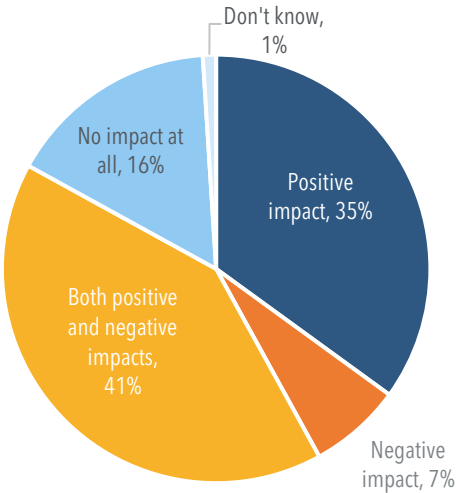
The City and Borough of Juneau contracted with McKinley Research Group (formerly McDowell Group) to conduct a telephone survey of 500 randomly selected Juneau residents regarding tourism. The survey was conducted in fall 2022 and closely resembled a survey conducted in fall 2021 (regarding the 2019 summer season); similar surveys were also conducted in 1995, 1998, 2002, and 2006. To qualify for the survey, residents had to have resided in Juneau in the summer of 2022. Survey results were weighted by age and neighborhood to reflect population characteristics. Following are key survey results.

Overall Impacts: Positive vs. Negative

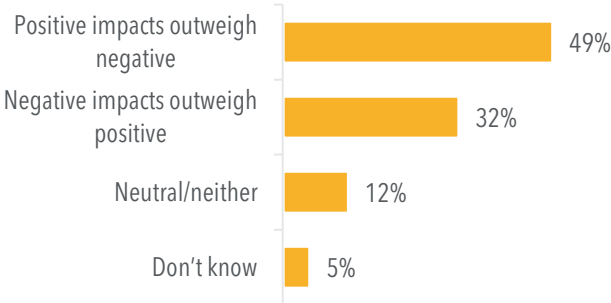
When asked about the overall impact of tourism on their household, over one-third of respondents (35%) said that tourism had an overall *positive impact*, while 7% said it had a *negative impact*. The most common response was *both positive and negative impacts* at 41%, while 16% said they felt no impact 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?

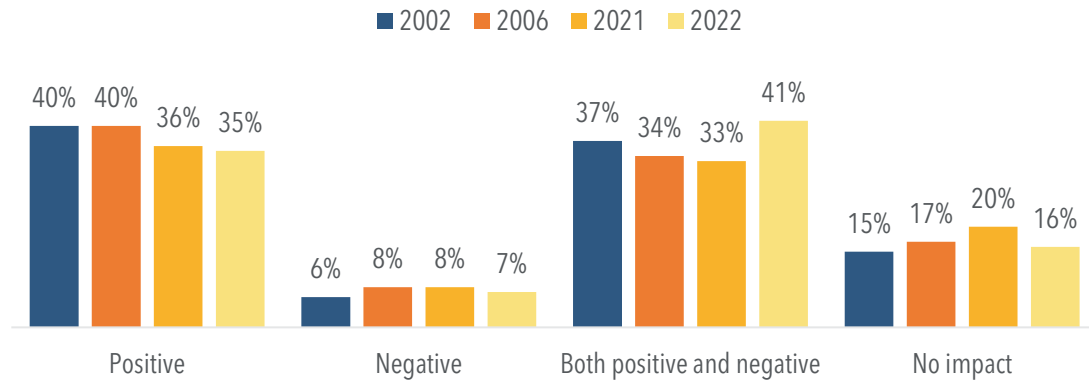


Among those who responded "Both:" Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



The question about the overall impact of tourism has been asked over the last four editions of the survey, with fairly consistent results. The only statistically significant difference between 2021 and 2022 results was an increase in respondents saying *both positive and negative impacts*: from 33% to 41%. (Note that the 2021 survey asked about impacts in the 2019 summer season due to the 2020 and 2021 seasons being impacted by COVID.)

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

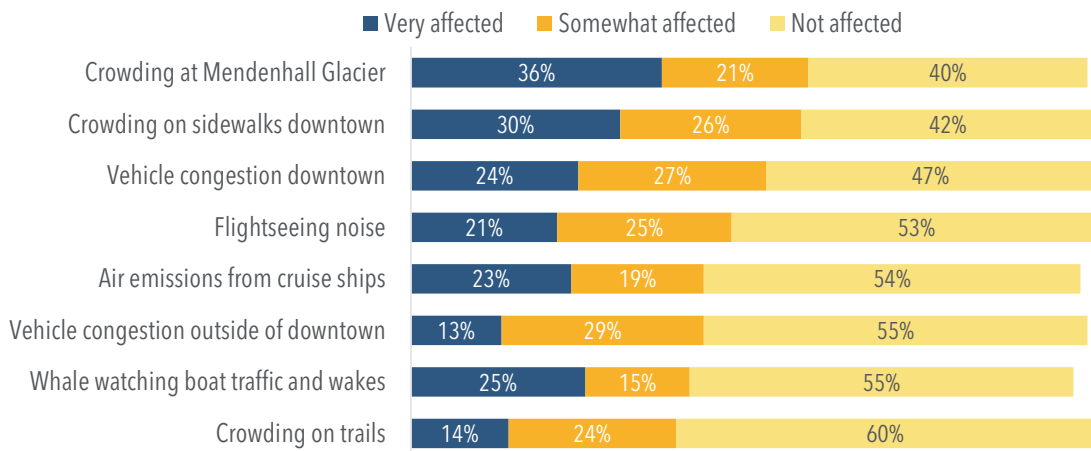


Notes: The 2021 survey referred to 2019 impacts. Columns do not add to 100% due to *don't know* responses.

Specific Impacts

Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2022. Respondents were most likely to be affected by crowding at Mendenhall Glacier (57% somewhat or very affected), crowding on sidewalks downtown (56%), and vehicle congestion downtown (51%).

For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2022?



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

Limiting Cruise Ships

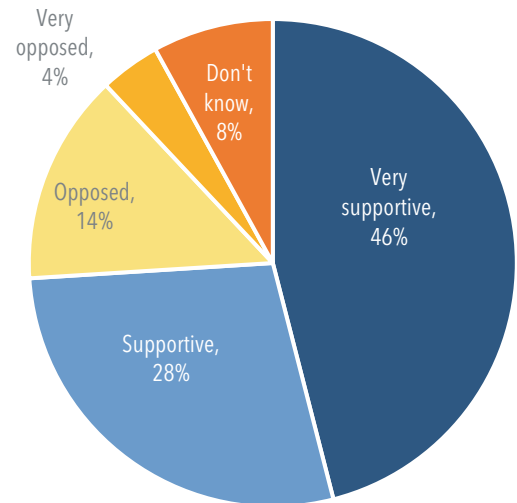
Respondents were read the following before the next question:

Currently, the maximum number of large cruise ships that can be accommodated in Juneau's harbor at the same time is five, four docked and one at anchor.

They were then asked whether they supported or opposed CBJ working to limit the number of large cruise ships per day in Juneau's harbor to five.

Three-quarters (74%) were *supportive*, including 46% *very supportive* and 28% *supportive*; 18% were *opposed*, including 14% *opposed* and 4% *very opposed*.

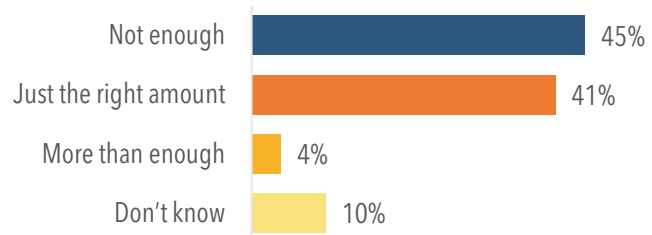
Are you very supportive, supportive, opposed, or very opposed to CBJ working to limit the number of large cruise ships per day in Juneau's harbor to five?



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* (45%), followed by *just the right amount* (41%) and *more than enough* (4%). Results closely resembled those in 2021, with differences of zero to 3% for each response.

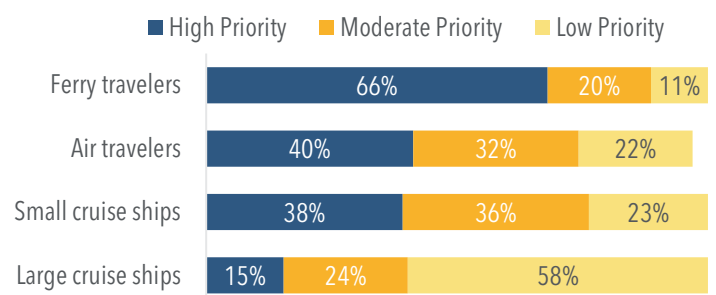
Do you think the City and Borough of Juneau is doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry?



Tourism Markets

When asked how much priority should be placed on growing four different visitor markets, *ferry travelers* were most likely to be deemed high priority at 66%, followed by *air travelers* at 40%, *small cruise ships* at 38%, and *large cruise ships* at 15%.

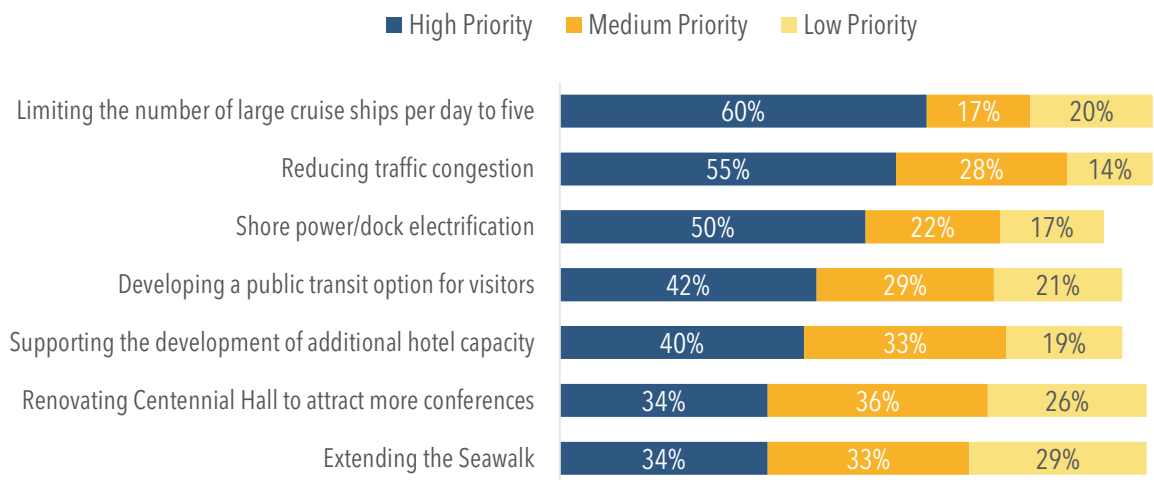
Do you feel that Juneau should place a high priority, moderate priority, or low priority in growing each of the following visitor markets?



CBJ Tourism Priorities

A new question in 2022 asked what level priority should be placed on seven different CBJ tourism activities. The highest priority was *limiting the number of large cruise ships per day to five*, with 60% saying this should be high priority, followed by *reducing traffic congestion* at 55% and *shore power/dock electrification* at 50%. The lowest priority activities were *renovating Centennial Hall to attract more conferences* and *extending the Seawalk* (both at 34% high priority).

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 will help inform CBJ's tourism management and planning efforts. This survey closely resembled a survey conducted by MRG in fall 2021; 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 had to have resided in Juneau in summer 2022.

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 500 randomly selected Juneau residents. The survey was conducted in October and November 2022.

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 for 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 the Mendenhall Valley represent 46% of the population, compared to 39% of the survey sample; and Downtown/Thane residents represent 10% 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	49	50
Female	50	50
Unknown	1	-
Area of Residence		
Mendenhall Valley	39	46
Salmon Creek/Lemon Creek/Switzer Creek	12	16
Douglas/West Juneau	14	12
Downtown/Thane	15	10
Brotherhood Bridge/Out the Road	11	11
North Douglas	8	5
Other	1	-
Age		
18-24	5	9
25-34	14	18
35-44	19	19
45-54	14	16
55-64	22	18
65-74	19	13
75+	8	6

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 pointed out 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, and 2021. Changes in question wording, where applicable, are noted. The following cruise passenger volumes provide context for the trend analysis.

Table 2. Juneau Cruise Passenger Volumes in Survey Years

	1995	1998	2002	2006	2019*	2022
Volume	380,600	568,500	741,500	951,400	1,305,700	1,150,000

*2019 volume is provided as 2021 respondents were asked about impacts in 2019.

Note: 2022 volume is preliminary.

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. The most common response was *both negative and positive impacts* at 41% followed by *positive impact* at 35%. Sixteen percent said *no impact at all*, and 7% said they experienced an overall *negative impact*.

Some statistically significant differences were evident by subgroup.

- Downtown/Thane and Douglas/West Juneau residents were more likely to report *both negative and positive impacts* at 51% and 53%, respectively; this compares with 42% of residents of Salmon/Lemon/Switzer Creeks (“Creeks”), 42% of North Douglas residents, 37% of Out the Road residents, and 36% of Mendenhall Valley residents.
- Creeks and Valley residents were more likely to report *no impacts at all* at 18% and 20%, respectively; this compares with 14% of Out the Road residents, 9% of Douglas/West Juneau residents, 7% of Downtown/Thane residents, and 3% of North Douglas residents.
- Respondents reporting a household member employed in tourism were more likely to cite positive impacts (44%) compared with other households (29%).

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=500	% of Total
Positive impact	35
Negative impact	7
Both negative and positive impacts	41
No impact at all	16
Don't know	1

Comparing to Past Surveys

In the 2021 survey 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?

Responses in 2022 were similar to 2021: positive impacts were cited by 36% in 2021 and 35% in 2022, while negative impacts were cited by 8% in 2021 and 7% in 2022. The percentage citing both negative and positive impacts grew from 33% to 41% – the only change of statistical significance.

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

	1998	2002	2006	2021	2022	Change 2021-22
Positive impact	29	40	40	36	35	-1
Negative impact	10	6	8	8	7	-1
Both negative and positive impacts	43	37	34	33	41	+8
No impact at all	16	15	17	20	16	-4
Don't know	1	1	1	2	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. One-half (49%) said the positive outweighed the negative; 32% said the reverse; and 12% 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=205	% of Base
Positive impacts outweigh negative	49
Negative impacts outweigh positive	32
Neutral/neither	12
Don't know	5
Refused	2

Comparing to Past Surveys

Responses in 2022 closely resembled those of 2021, with changes of only 1% to 2%.

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

	1998	2002	2006	2021	2022	Change 2021-22
Positive impacts outweigh negative (1998-2006: benefits outweigh costs)	45	46	47	51	49	-2
Negative impacts outweigh positive (1998-2006: costs outweigh benefits)	32	29	32	30	32	+2
Neutral/neither	16	16	14	14	12	-2
Don't know	6	8	7	4	5	+1

Composite Results

When combining results of the previous two questions, over half of respondents (55%) felt that either tourism has an overall positive impact on their household, or the positive impacts outweigh the negative. One out of five (20%) felt that either tourism has an overall negative impact on their household, or the negative impacts outweigh the positive. When comparing composite results between 2021 and 2022, there were no statistically significant changes.

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

n=500	% of Total
NET Positive	55
Positive impact	35
Both; positive impacts outweigh negative	20
NET Negative	20
Negative impact	7
Both; negative impacts outweigh positive	13
No impact at all	16
Neutral/neither	5
Don't know	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 36% very affected and 21% somewhat affected, for a total of 57% affected. Close behind was *crowding on sidewalks downtown*, with 30% very affected and 26% somewhat affected, for a total of 56% affected. Least impactful was *crowding on trails*: 14% reported being very affected and 24% somewhat affected, for a total of 38% affected.

Differences by neighborhood of residence and employment are shown in the following pages. The only other statistically significant differences by subgroup were by age.

- Younger respondents (under 35) were more likely to be somewhat/very affected by three types of impacts.
 - *Crowding on sidewalks downtown*: 68% versus 55% of middle-aged respondents (aged 35-54) and 47% of older respondents (55 and older).
 - *Crowding on trails*: 50% versus 39% of middle-aged respondents and 28% of older respondents.
 - *Air emissions from cruise ships*: 54% versus 40% of middle-aged respondents and 32% of older respondents.

Table 8. For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2022? (%)

n=500	Very affected	Somewhat affected	Very + Somewhat Affected	Not affected	Don't know
Crowding at Mendenhall Glacier	36	21	57	40	3
Crowding on sidewalks downtown	30	26	56	42	2
Vehicle congestion downtown	24	27	51	47	2
Flightseeing noise	21	25	46	53	1
Air emissions from cruise ships	23	19	42	54	5
Vehicle congestion outside of downtown	13	29	42	55	2
Whale watching boat traffic and wakes	25	15	40	55	5
Crowding on trails	14	24	38	60	2

Differences by Neighborhood

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

- Downtown/Thane residents were the most likely to be somewhat/very affected by *crowding on sidewalks downtown* at 74%, followed by Douglas/West Juneau residents (64%), Creeks residents (59%), Valley residents (53%), North Douglas residents (44%), and Out the Road residents (41%).
- Residents of Douglas/West Juneau were the most likely to be somewhat/very affected by *vehicle congestion downtown* at 70%, followed by Downtown/Thane residents (59%), North Douglas residents (59%), Creeks residents (53%), Valley residents (46%), and Out the Road residents (35%).
- North Douglas residents were the most likely to be somewhat/very affected by *crowding on trails* at 55%, followed by Downtown/Thane residents (44%), Creeks residents (42%), Valley residents (36%), Douglas/West Juneau residents (34%), and Out the Road residents (28%).
- North Douglas and Out the Road residents were the most likely to be somewhat/very affected by *whale watching boat traffic and wakes* at 55% and 54%, respectively, followed by Douglas/West Juneau residents (45%), Creeks residents (41%), Downtown/Thane residents (37%), and Valley residents (35%).
- Douglas/West Juneau and Downtown/Thane residents were the most likely to be somewhat/very affected by *air emissions from cruise ships* at 62% and 61%, respectively, followed by North Douglas residents (52%), Creeks residents (37%), Valley residents (35%), and Out the Road residents (26%).

**Table 9. IMPACTS BY NEIGHBORHOOD OF RESIDENCE:
"Very affected" plus "Somewhat affected" (%)**

	Downtown/ Thane n=75	Douglas/ West Juneau n=70	Creeks n=59	Mend. Valley n=200	North Douglas n=42	Out the Road n=54
Crowding at Mendenhall Glacier	52	56	53	58	69	55
Crowding on sidewalks downtown	74	64	59	53	44	41
Vehicle congestion downtown	59	70	53	46	59	35
Flightseeing noise	54	46	45	44	61	43
Air emissions from cruise ships	61	62	37	35	52	26
Vehicle congestion outside of downtown	47	50	37	43	45	37
Whale watching boat traffic and wakes	37	45	41	35	55	54
Crowding on trails	44	34	42	36	55	28

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 63%; this compares with 47% of those working in the Valley and 41% 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 67% versus 56% of those working in the Creeks area and 52% of those working in the Valley.
- Respondents who work in the Downtown/Thane area were more likely to be somewhat/very affected by *air emissions from cruise ships* at 52% versus 41% of those working in the Creeks area and 33% of those working in the Valley.

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

	Downtown/ Thane n=140	Creeks n=45	Mend. Valley n=83
Crowding at Mendenhall Glacier	61	49	55
Crowding on sidewalks downtown	67	56	52
Vehicle congestion downtown	63	41	47
Flightseeing noise	52	36	48
Air emissions from cruise ships	52	41	33
Vehicle congestion outside of downtown	45	40	41
Whale watching boat traffic and wakes	39	38	41
Crowding on trails	44	35	36

Comparing to Past Survey

There were a few statistically significant changes in the percentage of respondents feeling somewhat/very affected by various tourism impacts.

- Those somewhat/very affected by *vehicle congestion downtown* fell from 57% to 51%.
- Those somewhat/very affected by *vehicle congestion outside of downtown* increased from 36% to 42%.
- Those somewhat/very affected by *air emissions from cruise ships* increased from 36% to 42%.

Table 11. TREND: Somewhat + Very Affected, 2021 vs. 2022 (%)

	2021	2022	Change
Crowding at Mendenhall Glacier	57	57	-
Crowding on sidewalks downtown	57	56	-1
Vehicle congestion downtown	57	51	-6
Flightseeing noise	41	46	+5
Air emissions from cruise ships	36	42	+6
Vehicle congestion outside of downtown	36	42	+6
Whale watching boat traffic and wakes	41	40	-1
Crowding on trails	34	38	+4

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* (45%) followed by *just the right amount* (41%). Only 4% said they were doing *more than enough*, and 10% didn't know.

- Residents of North Douglas, Downtown/Thane, and Douglas/West Juneau were more likely to say CBJ was *not doing enough* at 57%, 55%, and 52%, respectively; this compares with 46% of Out the Road residents, 44% of Valley residents, and 33% of Creeks residents.

Table 12. 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=499	% of Total
More than enough	4
Not enough	45
Just the right amount	41
Don't know	10

Comparing to Past Survey

Responses in 2022 closely resembled those of 2021; there were no statistically significant changes.

Table 13. TREND: CBJ Tourism Management, 2021 vs. 2022 (%)

	2021	2022	Change
More than enough	7	4	-3
Not enough	45	45	-
Just the right amount	39	41	+1
Don't know	9	10	+1

Cruise Ship Limitations

Respondents were asked whether they were supportive or opposed to CBJ limiting the number of large cruise ships per day to five. Three-quarters (74%) were *supportive*, including 46% *very supportive*, while 18% were *opposed*, including 4% *very opposed*.

- Downtown/Thane residents were the most likely to be *supportive* at 83%, followed by Douglas/West Juneau residents (79%), Creeks residents (77%), North Douglas residents (74%), Valley residents (72%), and Out the Road residents (62%).
- Younger respondents were more likely to be *supportive* at 82%; this compares with 71% of middle-aged respondents and 70% of older respondents.

Table 14. Currently, the maximum number of large cruise ships that can be accommodated in Juneau’s harbor at the same time is five, four docked and one at anchor. Are you very supportive, supportive, opposed, or very opposed to CBJ working to limit the number of large cruise ships per day in Juneau's harbor to five?

n=500	% of Total
Total Supportive	74
Very supportive	46
Supportive	28
Total Opposed	18
Opposed	14
Very opposed	4
Don't know/refused	9

Comparing to Past Survey

A similar question was asked in 2021, but there were several important differences that prevent direct comparison. The 2021 question read:

Juneau’s cruise ship passenger volume is projected to increase by 22% between 2019 and 2022, from 1.3 million to 1.6 million passengers. Nearly all of these passengers arrive on large ships, which is defined in this survey as more than 500 passengers. Currently, the maximum number of large cruise ships that can be accommodated in Juneau’s harbor at the same time is five, four docked and one at anchor. Are you very supportive, supportive, opposed, or very opposed to CBJ working to limit the number of large cruise ships per day in Juneau's harbor?

Note that the words “to five” were added to the end of the 2022 question, in recognition of the progress already made toward this effort on the part of CBJ.

Responses to the 2021 question are as follows: 31% were *very supportive*, 32% were *supportive* (total 63% *supportive*), 18% were *opposed*, and 10% were *very opposed* (total 28% *opposed*).

Tourism Best Management Practices

TBMP Awareness

Respondents were asked how familiar they were with the Tourism Best Management Practices (TBMP) program. Over half (57%) were *not familiar*, 26% were *somewhat familiar*, and 16% were *very familiar*.

- Those with household members employed in tourism were much more familiar with the program: 23% were *very familiar*, and 36% were *somewhat familiar*. This compares with 12% and 20%, respectively, of other respondents.
- Older respondents were most likely to be *very familiar* (22%), followed by middle-aged respondents (15%) and younger respondents (10%).

Table 15. 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=500	% of Total
Very familiar	16
Somewhat familiar	26
Not familiar	57

Comparing to Past Survey

Although there were slight shifts in responses 2021 and 2022, changes were not statistically significant.

Table 16. TREND: CBJ Tourism Management, 2021 vs. 2022 (%)

	2021	2022	Change
Very familiar	14	16	+2
Somewhat familiar	32	26	-6
Not familiar	54	57	+3

TBMP Effectiveness

Among those somewhat or very aware of TBMP, 17% said the program was *very effective*; 52% said it was *somewhat effective*; and 15% said it was *not effective*.

- Older respondents were more likely to say it was *not effective* at 22%; this compares with 10% of middle-aged respondents and 8% of younger respondents.

Table 17. 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=223	% of Base
Very effective	17
Somewhat effective	52
Not effective	15
Don't know/not aware	16

Comparing to Past Survey

The 2021 question was more detailed, asking respondents to rate TBMP's effectiveness on three factors, rather than overall, preventing year-to-year comparison.

Tourism Markets and Initiatives

Tourism Markets

When asked how much priority should be placed on growing four different visitor markets, *ferry travelers* were most likely to be deemed high priority at 66%, followed by *air travelers* at 40%, *small cruise ships* at 38%, and *large cruise ships* at 15%.

- Creeks residents were more likely to rank *air travelers* as high priority at 52%, followed by Downtown/Thane residents at 47%, North Douglas residents at 46%, Out the Road residents at 41%, Valley residents at 36%, and Douglas/West Juneau residents at 34%.
- Older respondents were more likely to rank *small cruise ships* as high priority at 49%; this compares with 32% of middle-aged respondents and 29% of younger respondents. Older respondents were also more likely to rank *air travelers* as high priority at 46%; this compares with 42% of middle-aged respondents and 30% of younger respondents.

Table 18. Do you feel that Juneau should place a high priority, moderate priority, or low priority in growing each of the following visitor markets? (%)

n=500	High Priority	Moderate Priority	Low Priority	Don't know
Ferry travelers	66	20	11	3
Air travelers	40	32	22	5
Small cruise ships	38	36	23	4
Large cruise ships	15	24	58	3

Comparing to Past Survey

The percentage of respondents saying a high priority should be placed on growing the *air market* fell from 48% in 2021 to 40% in 2022; no other changes were statistically significant.

**Table 19. TREND: Market Growth Prioritization, 2021, 2022
% High Priority**

	2021	2022	Change
Ferry travelers	71	66	-5
Air travelers	48	40	-8
Small cruise ships	39	38	-1
Large cruise ships	18	15	-3

Public Transit Option for Visitors

Over two-thirds of respondents (69%) were *supportive* of CBJ developing a public transit service for visitors, including 26% *very supportive*. One-fifth (20%) were *opposed*, including 6% *very opposed*.

- There were no statistically significant differences by area of residence, but those who work in Downtown/Thane and the Creeks were more likely to be *supportive* (78% and 79%, respectively) than those who work in the Valley (59%).
- Older respondents were less likely to be *supportive* at 60%; this compares with 74% of both middle-aged and younger respondents.

Table 20. CBJ is considering developing a public transit option for visitors to access downtown and popular attractions. Would you be very supportive, supportive, opposed, or very opposed to CBJ developing this service?

n=500	% of Total
Total Supportive	69
Very supportive	26
Supportive	43
Total Opposed	20
Opposed	14
Very opposed	6
Don't know	11

CBJ Tourism Department Priorities

Respondents were asked what level priority should be placed on seven different CBJ tourism activities. The highest priority was *limiting the number of large cruise ships per day to five*, with 60% saying this should be high priority, followed by *reducing traffic congestion* at 55% and *shore power/dock electrification* at 50%. The lowest priority activities were *renovating Centennial Hall to attract more conferences* and *extending the Seawalk* (both at 34% high priority).

- Douglas/West Juneau residents were the most likely to place a high priority on *shore power* (64%); this compares with 59% of North Douglas residents, 54% of Downtown/Thane residents, 52% of Creeks residents, 49% of Out the Road residents, and 43% of Valley residents.
- Douglas/West Juneau residents were the most likely to place a high priority on *reducing traffic congestion* (69%); this compares with 62% of Downtown/Thane residents, 61% of North Douglas residents, 60% of Creeks residents, 50% of Valley residents, and 44% of Out the Road residents.
- Downtown/Thane and Creeks residents were the most likely to place a high priority on *limiting the number of cruise ships* at 72% and 70%, respectively; this compares with 67% of Douglas/West Juneau residents, 64% of North Douglas residents; 54% of Valley residents, and 49% of Out the Road residents.
- Creeks residents were the most likely to place a high priority on *renovating Centennial Hall* at 52%; this compares with 46% of Downtown/Thane residents, 43% of North Douglas residents, 37% of Out the Road residents, 34% of Douglas/West Juneau residents, and 24% of Valley residents.
- Middle-aged and older respondents were more likely to place a high priority on *shore power* (56% and 52%, respectively) when compared with younger respondents (40%). Older respondents were more likely to place a high priority on *extending the Seawalk* at 41%; this compares with 34% of younger respondents and 26% of middle-aged respondents. Younger respondents were more likely to place a high priority on *developing a public transit option* at 52%; this compares with 41% of middle-aged respondents and 36% of older respondents.

See table, next page

Table 21. Should the CBJ Tourism Department place a high priority, medium priority, or low priority on each of the following items? (%)

n=500	High Priority	Medium Priority	Low Priority	Don't know
Limiting the number of large cruise ships per day to five	60	17	20	3
Reducing traffic congestion	55	28	14	3
Shore power/dock electrification	50	22	17	12
Developing a public transit option for visitors	42	29	21	8
Supporting the development of additional hotel capacity	40	33	19	7
Renovating Centennial Hall to attract more conferences	34	36	26	4
Extending the Seawalk	34	33	29	4

When asked which priority was most important, the most popular response was again *limiting the number of large cruise ships* (28%), followed by *shore power/dock electrification* (16%) and *reducing traffic congestion* (14%).

Table 22. Of the priorities I just mentioned, which one do you think is MOST important? (%)

n=500	% of Total
Limiting the number of large cruise ships per day to five	28
Shore power/dock electrification	16
Reducing traffic congestion	14
Developing a public transit option for visitors	12
Supporting the development of additional hotel capacity	8
Extending the Seawalk	8
Renovating Centennial Hall to attract more conferences	8
Don't know	5

Additional Suggestions

Following the previous questions about prioritization, respondents were asked:

Are there any activities I didn't mention that you think the CBJ Tourism Department should prioritize?

About one-half of respondents offered suggestions. Common themes included improving parking, limiting cruise ships/passengers, addressing the housing shortage, and improving trails. A full list of verbatim responses can be found in the Appendix.

Visitor Distribution

An equal percentage of respondents (42%) agreed with the statement *CBJ should work to spread visitors throughout the Borough* as with the statement *CBJ should work to keep visitors concentrated in areas developed for tourism*. Sixteen percent said neither, or they didn't know.

- Downtown/Thane residents were more likely to agree with *CBJ should work to spread visitors throughout the Borough* at 62%. This compares with 49% of Douglas/West Juneau residents, 47% of Creeks residents, 42% of Out the Road residents, 37% of North Douglas residents, and 35% of Valley residents.
- Valley residents were the most likely to agree with *CBJ should work to keep visitors concentrated in areas developed for tourism* at 47%, followed by North Douglas residents (44%), Out the Road residents (44%), Creeks residents (40%), Douglas/West Juneau residents (37%), and Downtown/Thane residents (25%).

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

n=500	% of Total
CBJ should work to spread visitors throughout the Borough	42
CBJ should work to keep visitors concentrated in areas developed for tourism	42
Neither/don't know	16

Tourism Employment

Over one-third of respondents (38%) said that they or a member of their household had been employed in the Juneau tourism industry sometime in the past five years.

- Younger respondents were more likely to answer affirmatively (51%) followed by middle-aged respondents (37%), then older respondents (29%).

Table 24. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?

n=500	% of Total
Yes	38
No	62

Among those reporting a household member employed in tourism, the average number of household members was 1.8 people.

**Table 25. How many people?
Base: Household member employed in tourism**

n=173	% of Base
1	53
2	30
3	8
4+	8
Average	1.8 people

Comparing to Past Surveys

The percentage of people saying a household member was or had been employed in tourism increased from 32% in 2021 to 38% in 2022, while the average number of household members employed increased from 1.5 to 1.8.

Note that in the 2002 and 2006 surveys, the length of time was two years rather than five years, which explains some of the increase in the more recent surveys.

**Table 26. TREND: Household Member Employed in Juneau Tourism
2002, 2006, 2021, 2022**

	2002 Past 2 years	2006 Past 2 years	2021 Past 5 years	2022 Past 5 years	Change 2021-22
Household member employed	21%	23%	32%	38%	+6%
Average number	1.4 people	1.4 people	1.5 people	1.8 people	+0.3

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 (39%) followed by Downtown/Thane (15%), Douglas/West Juneau (14%), Salmon Creek/Lemon Creek/Switzer Creek (12%), Brotherhood Bridge/Out the Road (11%), and North Douglas (8%).

Respondents were most likely to work in Downtown/Thane (28%) followed by the Valley (17%). Three out of ten respondents (29%) did not provide a place of employment due to unemployment, retirement, etc.

**Table 27. In which area of the City and Borough do you live?
In which area of the City and Borough do you work?
UNWEIGHTED**

n=500	LIVE % of Total	WORK % of Total
Mendenhall Valley	39	17
Downtown/Thane	15	28
Douglas/West Juneau	14	3
Salmon Creek/Lemon Creek/Switzer Creek	12	9
Brotherhood Bridge/Out the Road	11	3
North Douglas	8	2
Other	<1	2
Borough-wide	n/a	6
Unemployed/retired/student/etc.	n/a	29
Don't know/refused	1	2

Respondents were about half male (49%) and half female (50%). Note that gender was not asked directly of respondents; surveyors made assumptions based on voice, resulting in 1% “don’t know” responses.

**Table 28. Gender
UNWEIGHTED**

n=500	% of Total
Male	49
Female	50
Don't know	1

Respondents reported an average age of 52; the most common age group was 55 to 64 (22%).

**Table 29. Age
UNWEIGHTED**

n=500	% of Total
18-24	5
25-34	14
35-44	19
45-54	14
55-64	22
65-74	19
75+	8
Average age	52 years old

Responses to Open-Ended Question

Are there any activities I didn't mention that you think the CBJ Tourism Department should prioritize?

- \$5 surcharge per person to go into a fund that is distributed to residents so all would share in profits from ships. We'd be happier about more ships coming in!
- 1. No information on dock electrification, need more public information. 2. Where would new visitors stay, not enough hotel space for visitors on ferries and air travelers.
- 5th cruise ship dock by Sealaska may use private facilities instead of public, CBJ will lose revenue.
- A new transit system could detract wages from local taxi operators.
- Add art and music center.
- Add Doris St. bus stop back before adding things for tourists.
- Add electric buses.
- Add more parking downtown.
- Additional public bathrooms (even portable bathrooms in the summer would be helpful).
- Advocate more strongly for enforcing fines on some boats that get too close to whales. Also, sewage dumping in the harbor needs to be carefully regulated.
- Airport traffic helicopters. There are too many and are too loud.
- Announcing how much CO2 was generated this Summer and work to reduce it. Reduce bus emissions or use electric buses. Reduce trail use to 20 per trail.
- Anything to help our community recover from Covid.
- At least one day that ships are not in, to give locals a chance to go downtown.
- Better accommodations & transportation to/from Bartlett regional hospital for visitors.
- Big businesses are buying out businesses that were once owned by locals in Juneau.
- Boat traffic.
- Boats should not be leaving loud departure chimes or signals (foghorn excepted). Reinstate Ocean Ranger program.
- Build a road to Haines.
- Build a train, transit.
- Building City Hall.
- Can city/borough limit number of people who get off cruise ships? This would help Juneau not be overrun with tourists.
- Capturing economic impact of tourism industry in Juneau; don't mistake business to benefit. Dump is terrible, need to have tourism industry pay for extra wear and tear on roads,

wastewater, and other negative externalities. Harbor wear and tear, trails have fees to support.

- CBJ does not prioritize residents. Auke Bay not allowing king salmon fishing from the dock any longer.
- CBJ needs to broadcast potential plans and reasons more broadly to inform people.
- CBP needs a bigger office at the harbor; Docks and Harbors need more space/bigger offices (and condensed into one); need more bathrooms in those buildings (and more public bathrooms).
- Cell service gets bad when ships are in. Housing for the workforce. Put pressure on the cruise ship industry to build housing for the workers.
- Cigarette smoking downtown: canisters overflow because of so many cruise ship crew and passengers smoking in downtown. One caught fire and the fire department needed to be called. Create a smoking section or disallow smoking downtown.
- City relies too much on tourism money.
- CLIA should fund an EPA approved incinerator for our landfill to help process the 3 million pounds of trash they leave in Juneau's landfill.
- Closing Front Street, Franklin and Marine Way could create a pedestrian mall during tourist season then car traffic could be diverted to other areas. CBJ should reduce visitors' impact by such measures.
- Continue to make improvements that please the cruise ships so that they will return. This makes Juneau's economy strong.
- Coordinate with Mendenhall Glacier Visitor Center and the prospective number of tour busses scheduled at the same time. Sometimes the buses were 7 deep waiting for parking and spewing exhaust every minute.
- Covid hurt the economy. Tourism is important but Juneau has become a zoo. It is way too much to the point it has become a torment to locals trying to go about their lives.
- Cut season May 1- Sept 31.
- Cut tourist numbers in half.
- Develop a new small boat harbor.
- Develop educational attractions downtown. Ex: aquarium, raptor center, Southeast Alaska bird life exhibit.
- Develop hotel capacity.
- Develop independent traveler.
- Develop tourist attractions that Juneau people can use the whole year.
- Discharge of water from ships: Has many questions about why state oversight budget was cut. Could CBJ take the lead on this at least with posing the questions and follow up to get oversight back?
- Do road construction after hours. Clean up Glacier Highway (trashy tacky). Work with existing Lyft/rideshare to make it more ride friendly.
- Dock electrification.

- Dock electrification if the cruise lines pay. Tax cruise ships for the Alaska school system.
- Docking and pollution control.
- Downtown parking.
- Drug enforcement. Get a drug dog to make sure no drugs are coming into Juneau. Maintain road safety for DUI, potholes, speed enforcement, etc.
- Eaglecrest should be subsidized. Do something in summer.
- Effects on city water and electric.
- Electric bus options.
- Electric buses. One day without ships.
- Encourage more restaurants options. New opportunity for students to get involved in the occupations in the tourist industry.
- Encouraging public/private transportation options to Auke Bay or Glacier. Not in favor of adding 5th dock at subport.
- Fewer large cruise ships.
- Find a way to weigh in on discharge into waters by cruise ships. This must be addressed.
- Finding uses for the ghost town Juneau becomes in the fall.
- Fix Walmart Building.
- Fixing the dock expansion on Aurora.
- Fixing trails that the tourists impact. Mt. Roberts is highly used and needs more maintenance.
- General upkeep of trails, marked clearly. Garbage pickup.
- Gray water discharges - the way they discharge through the pipes gray water pumped by cruise ship is a known fact. The cruise ships dump gray water and pollute the fisheries Juneau counts on. Air quality is also very poor.
- Harbor Department should spend money on dock electrification and the waterfront - a smart long term investment.
- Help Eaglecrest make money during the summer.
- Help the hospital to handle tourists who need to use the hospital services.
- Helping to ensure clean waters. Do not let cruise ships get away without oversight.
- Housing
- Housing for employees who work the tourism jobs needs to be thought out. An empty hotel would work. Not enough housing for all the people needed to work in Juneau.
- Housing is not available for the locals because of tourism. Something needs to be done.
- Housing for general public. Believe that employment shortages are partly because of the lack of affordable housing. Put limits on Air BNB.
- Human waste should be dumped in a sewage plant, not the ocean. This needs to be addressed.
- I avoid downtown. Residents need to be considered more.
- I have a small fish boat. I want more safety rules for big ships!
- I question whether some of these plans or developments are the role of the City/Borough.
- If Eaglecrest expands, 2nd bridge needs to be installed.

- If it is not free to tourists, the public transport would be fine (as long as Juneauites/city aren't paying for it, unless it is improving public transit for Juneauites as well)
- Improve cell phone service: it gets reduced when more than two ships are in.
- Improve parking downtown.
- Improve road maintenance.
- Improve trail maintenance.
- Improving public transit for everyone; not passing on the cost to local residents.
- Improving the look of downtown Juneau, enhancing the history of Juneau as the capital and mining community and restore some of the mining out Thane to give visitors more of a pleasant experience which then helps the economy.
- Increased harbor facilities for Auke Bay - moorage and parking.
- Juneau housing shortage is a big concern. Discharging in areas where they commercial fish is also a problem. New oversight program was underfunded and the cruise industry now lacks oversight.
- Juneau needs more ferries.
- Juneau needs safety people to keep tourists out of the street. Encourage tourists to follow sidewalk and street laws.
- Juneau Tourism Department needs to give more support to small businesses.
- Keep pedestrians off the streets.
- Keeping the focus downtown, and supporting local business and activities that are not necessarily tourism-focused. And keep it accessible to walkers.
- Landfill, water utilities and hospital capacity. Examine impacts on locals including finances. Does consumption increase during summer with cruise ships and all tourist industry?
- Large groups of tourists all at once crowding roads is uncomfortable and hazardous. He has a friend who had a heart attack; the ambulance wasn't able to move easily through gridlock. This became life/death problematic.
- Less than 5 ships per day. One day per week with no ships.
- Light at Fred Meyer intersection.
- Limit bigger cruise ships, whale boats.
- Limit it to only 4 ships per day.
- Limit large boats to 5 until there is enough power at AELP.
- Limit number of passengers in Juneau. Could use more hotel space.
- Limit number of people rather than number of ships. Limit number of visitors at each venue at one time.
- Limit ships to 2 per day, not 5. Cut back dates of season. Elevated light rail between airport and downtown and the glacier.
- Limit the ships. Juneau should be able to do something with the head tax to benefit the locals instead of the tourists. Charge more per head. Use tax money for things to benefit us.
- Limit whaling boats in Auke Bay to calm down congestion.
- Limiting amount of tourists.

- Limiting cruise ships.
- Limiting number of cruise ships to far less than 5. Give residents a day with no ships. Limited hours for visitors. Would rather see small boats than large ships. No new docks.
- Limiting the number of large ships; and addressing the number of passengers in a day (five mega-ships is too many).
- Local people compete in air travel with the tourists. Something should be done to help the locals. Tourists also strain bus service to get to the glacier. Transit system idea is a good one.
- Looking at utilizing all of Juneau-improving Lemon Creek's natural attributes.
- Lowering air and water pollution should be a priority.
- Maintaining clean water in Gastineau Channel.
- Make electricity less expensive.
- Make sure locals are not overlooked. Hotels not renting to locals.
- Management of Eaglecrest traffic once the gondola is open.
- Maximum of 3 ships per day. Public transit for visitors should be an electric rail system. Get them off the road.
- Monitor cruise ship speed in channel. Lengthen to "Marmion" not Dupont.
- Monitor the emissions from the smokestacks and control it better.
- More affordable housing is more important than hotel additions.
- More bathrooms for tourists.
- More buses running more often to the valley.
- More charter boat options.
- More conventions would be held at Centennial Hall if the prices were more reasonable.
- More enhancements to parks and trails in coordination with Parks and Recreation Department.
- More independent travelers.
- More info (maps) for visitors. Old folks don't use phone.
- More local job recruitment.
- More outdoor recreation: biking, hiking, climbing.
- More parking.
- More parking at the Whale.
- More parking downtown.
- More parking for locals.
- More taxis, buses at airport. More parking downtown.
- More things to do that involve the community.
- More tourist business open year-round.
- Move the whale from whale park closer to town where people can see it.
- Narrow gauge railroad to tie into Skagway. Easier to put cars on the railroad as the railroad is cheaper to build than a road. Plus snow maintenance is cheaper with a private company picking up the tab.
- Need "local" parking downtown.

- Need a machine to purchase bus pass for the day.
- Need affordable housing for seasonal workers and residents.
- Need more food trucks downtown. Nothing to eat or drink by the Seawalk. Need a program to support food trucks to fill in the gaps.
- Need new JACC, black box room for whale watching. Need narrow gauge railroad and parking to relieve road congestion.
- Need to consider locals in program planning. Money for local environment sponsor program.
- Need to provide information on what CBJ is doing to address water pollution (gray water) and air pollution (diesel fuel emissions)
- Needs to address overcrowded healthcare facilities during tourist season.
- No chairs for seniors to sit down. More housing is needed. Send tourists to Auke Bay or Thane.
- No further or little development at Mendenhall Glacier Lake.
- No taxing whale boat captains.
- Noise and pollution and dumping in landfill. Want to see limits and regulation on these.
- Nonprofits like Juneau Trail and Roadrunners should be able to advertise to cruise ships to help support events with cruise ship passengers participating in races, including for the Audubon.
- Not anti-tourist but most business downtown are owned out of state.
- Not sure how to spread the word on certain developments, like the public transit proposal, but this needs to be done to let Juneau residents decide.
- Parking (x4)
- Parking spaces designated for parking in town.
- Pay attention to other areas of the city besides downtown
- Pedestrian traffic is horrendous. Needs to be addressed.
- People from the lower 48 take jobs away from locals. The temporary workers usually indulge in drugs and alcohol for a couple of years before they go back to the Lower 48. Fix more high-rise parking. Cruise ships get the cheap summer electricity. CBJ should do more for local children rather than being concerned about visitors.
- Places to sit down and public restrooms and water fountains.
- Pollution from cruise ship dumping is not addressed in this survey.
- Pollution wasn't mentioned but electrification of the docks should help cruise ships produce less toxic exhaust because they now operate on diesel fed generators mostly.
- Pressure on local fishery and pressure on whales cause a direct effect on me.
- Prioritize clean water and clean air. Make a statement that this, and not profits, drives the city's goals.
- Prioritize locals. If locals did not operate anything tourist could not come here to buy diamonds.
- Prioritize mixed use areas for both residents/tourists.

- Prioritize what local taxpayers need. Tax money staying in the city.
- Promote more tourism with private enterprise.
- Promote our trails more.
- Promoting independent travelers.
- Property owners would ask people to cost to develop trails.
- Public transit for those disembarking ferries.
- Public transit improvements, with one downtown loop from the AJ dock to the capitol, goes towards Foodland/JAHC/Museum, and back to the AJ dock. With a low-cost day pass for that route would be amazing. Public restrooms: there aren't enough, nor are they clean/neat enough. The nice ones at the whale, and at the tram, but there are not good signs for the existing ones either. And there should be nice, modern, accessible ones too.
- Public transport would have to benefit people in Juneau who rely on the bus for transportation, and it gets super crowded in the summer and locals can't get a seat; limiting cruise ships across the borough; limit the number of whale-watching trips/boats per day in Juneau.
- Put a zipline from Mt. Roberts to the glacier.
- Put Centennial Hall and Juneau Arts buildings together.
- Put limit on the whale watching boats.
- Putting Totem poles up and advertising them more.
- Recognizing the impact on locals. Tourists intruding on non-traditionally tourist area (Douglas Island).
- Re-do the JACC building and fund raise - a deeper need for Juneau than Centennial Hall.
- Reduce number of ships to 3 or 4. 5 is too many with newer larger ships.
- Reduce footprint of industry.
- Reducing number of visitors each day.
- Relocate the airport. Extend the road.
- Rental Jeep for tourists. Whale watching needs to be monitored. They clog traffic. Less helicopter overflights.
- Replacing the bear proof trash cans downtown. Preventing bears walking around downtown.
- Replacing the JACC so we have a performing arts center also use it for conferences and all things like that.
- Respecting residents. Planes buzzing around houses. Turn Franklin St into foot traffic only.
- Restrooms (more).
- Road maintenance.
- Safer downtown now - but many vacancies after COVID. Incentivize bringing business back downtown.
- Second crossing.
- Ships should educate people about safety/dress in the area/respect the locals/small ships are more courteous.

- Shops close at the end of tourist season and could be open for locals to shop for a couple of weeks after the season. About two weeks in November would be nice, especially weekends.
- Should limit to less than 5 ships per day. Would support public transit option if it was also for locals. Dual use for tourist centered businesses. Moving homeless to the valley is not okay to hide them from tourists.
- Should not allow cruise ships to come to Juneau to dump in our landfill. Needs to stop.
- Should not have international diamond shops in Alaska. Alaska is about gold, not diamonds. Juneau shouldn't pander to multinationals catering as locals to tourists.
- Sightseeing restrictions.
- Smaller cruise ships can sell more excursions that give different options to entertain visitors for 8 hours. Large cruise ships operate on "faster rotation, more profits."
- Smoke emissions from cruise ships is pretty bad where he lives on Douglas. Bedroom window overlooks the harbor in a narrow spot. Smoke is in layers across water and sky.
- So many big whale-watching boats, would like to see some limits.
- Solid waste disposal by cruise ships leaves a lot of questions. City/Borough could address residents' concerns better.
- Stop selling downtown to cruise lines.
- Street improvements for residents. All eggs in one basket: tourist. Need diversity.
- Support JACC as part of tourism.
- Support local small operations.
- Supporting benefit art for locals and tourists.
- Supporting local owned business.
- Take public comment before building a new dock between bridge and wharf (at sub port).
- The air pollution and damage greatly increases with more big cruise ship dockings.
- The federal government has proposed certain activities on the glacier. The city and borough should be involved in these decisions that will impact the glacier.
- The hospital struggles to communicate with passengers or crews from cruise ships. Need more translators.
- The Senate building has a constant line to the bathroom. Juneau needs more restrooms!
- The size and volume of tour boats make too many boats getting in and out of harbor. It is a nightmare.
- The whale boats are too bold and close to those fishing. Also breaking laws regarding how close they get to whales. Get on the captains better.
- There are a ton of whale watching boats, and the big ones create big wakes, and the smaller ones aren't so bad; but there really shouldn't be any more allowed out, or at least the number of trips/passengers a day might be limited, or possibly the size of boats.
- There should be more ships, more tourists, more people visiting the town.
- They should make a dorm or housing arrangement for the legislators.

- This survey did not mention the environmental stress from tourism on Juneau, as it impacts the animals, the air, the water.
- Too many Air BNBs and no apartments for rent at a reasonable price.
- Too many tourists on city buses so locals can't get on. Need more buses or tourist shuttle where they pay for it.
- Too much emphasis on number of ships and not on number of visitors. Number of visitors per day should be limited.
- Tourism is very important in the economy. My parents own a tourism company.
- Tourism takes up space for housing, AirBNB and VRBO.
- Tourists destroy roads and sidewalks; five ships a day is too many. CBJ uses Juneau's tax dollars to fix problems caused by tourists.
- Tourists ignore the chains put up to guide them walking the street.
- Traffic circles education.
- Trails and recreation.
- Trails should be monitored for more safety.
- Transit link to ferry terminal.
- Upgrade the JACC, not rebuild it.
- Use Walmart for combo tourists attraction/indoor sports for kids. Parking downtown for locals in summer. Take a pro-active role to encourage ships to use shore power, use a higher-grade fuel to reduce smoke and within a distance of city. Valdez requires this.
- Wants to encourage more bed and breakfast businesses. Regulate amount dumped in landfill from cruise ships.
- Wants to know more about City's plans about dock electrification.
- We need local ferry service.
- We should control number of tourists daily, improving quality of life for residents and improving the experience for visitors.
- Whale watching has gone crazy-obnoxious not well-designed boats on the waterway. Whale harassment and Captains with their own charter boats create huge wakes, 5-foot wakes are not out of the question. Helicopter traffic changed, they are now flying over residential areas as many as six to eight times a day.
- Winter tourism should be marketed and supported.
- Work to improve seasonal housing.
- Would be good to have more information on these plans because shouldn't hear about certain City/Borough ideas for the first time on a survey.
- Would like to see more energy put on solving the teacher shortage or food distribution to the poor than city-borough government concentrated on cruise ship travel amenities.

Survey Instrument

See attached.

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