



*Formerly McDowell Group*

# JUNEAU TOURISM SURVEY

## 2024

January 2025

**PREPARED FOR:**

**City and Borough of Juneau**



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# Executive Summary

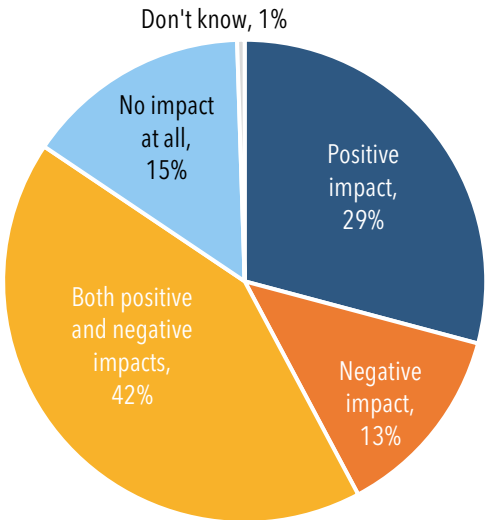
The City and Borough of Juneau contracted with McKinley Research Group to conduct a telephone survey of Juneau residents regarding tourism. The survey was conducted in December 2024; similar surveys were conducted in 1995, 1998, 2002, 2006, 2021, 2022 and 2023. To qualify for the survey, respondents were required to be current residents and to have lived in Juneau in the summer of 2024. Survey results were weighted by age and neighborhood to reflect population characteristics. Following are key survey results.

## Overall Impacts: Positive vs. Negative

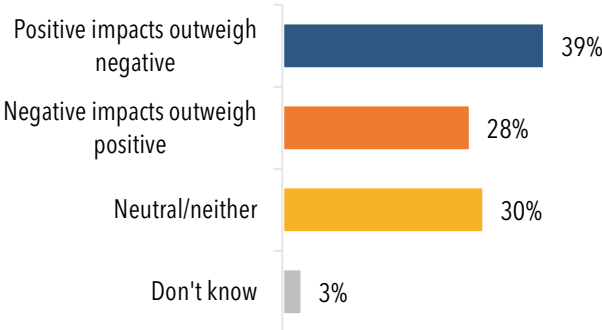
When asked about the overall impact of tourism on their household, three out of ten respondents (29%) said that tourism had an overall *positive impact*, while 13% said it had a *negative impact*. The most common response was *both positive and negative impacts* at 42%, while 15% said they felt no impact 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* (39%) than *negative impacts outweigh the positive* (28%); another 30% 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?

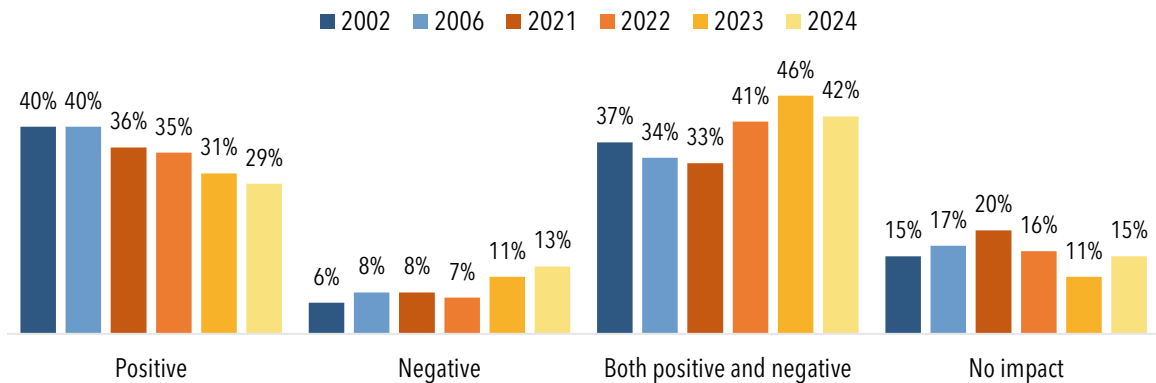


### Among those who responded "Both:" Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



The question about the overall impact of tourism has been asked over the last six editions of the survey. Those reporting overall positive impacts decreased over time from 40% in 2002 and 2006 to 29% in 2024, while those reporting negative impacts increased from 6% to 13%.

### TREND: Overall Impact of Tourism on Households, 2002 to 2024

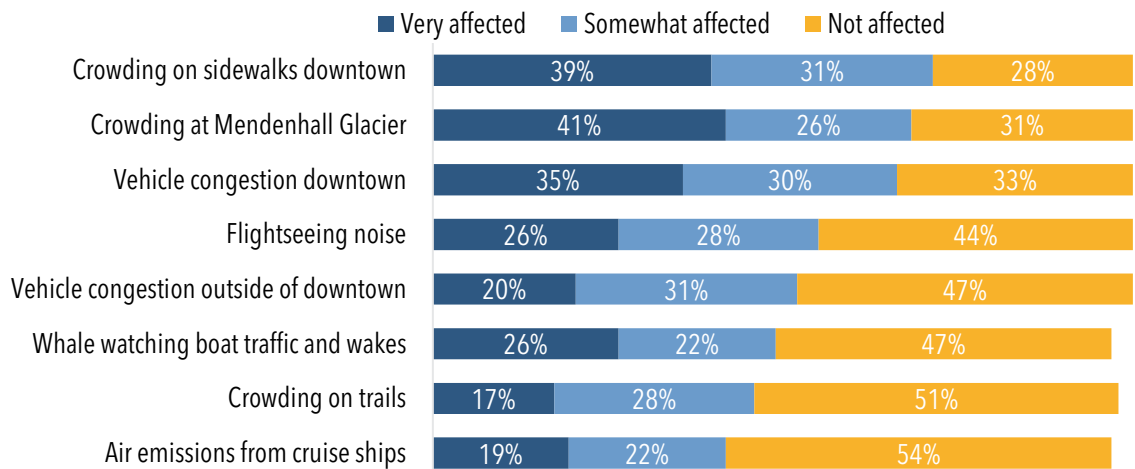


Notes: The 2021 survey referred to 2019 impacts. Excludes "don't know" and refused responses.

### Specific Impacts

Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2024. Respondents were most commonly affected by *crowding on sidewalks downtown* (70% somewhat or very affected), *crowding at Mendenhall Glacier* (67%), and *vehicle congestion downtown* (65%).

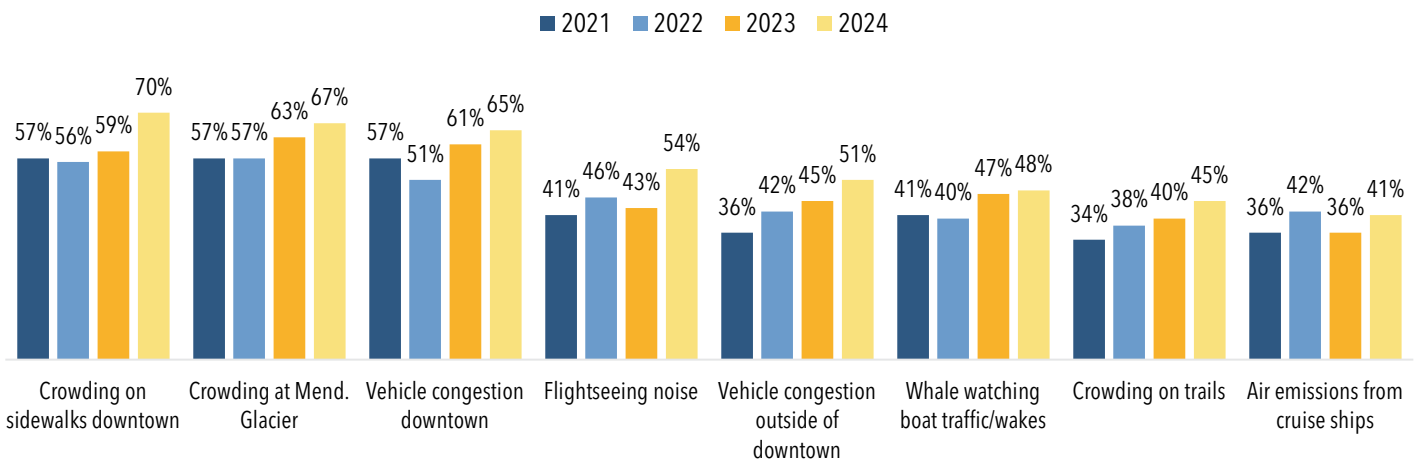
### For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2023?



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

The rates of those somewhat or very affected by tourism-related impacts was highest in seven out of eight categories in 2024 compared to the previous three years. The largest year-over-year increases were for *crowding on sidewalks downtown* (from 59% to 70% affected) and *flightseeing noise* (from 43% to 54%). The largest increase over the last four years was *vehicle congestion outside of downtown* (from 36% to 51%).

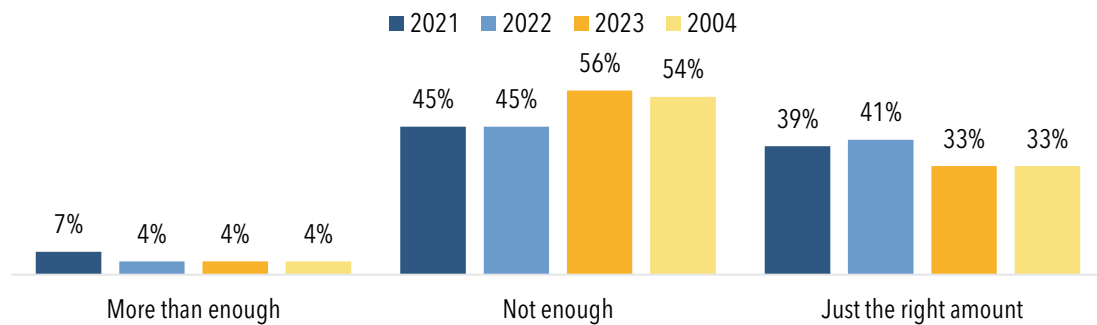
### TREND: Percentage of Households Somewhat/Very Affected, 2021 to 2024



### 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* (54%), followed by *just the right amount* (33%). Responses were nearly identical between 2023 and 2024. A new, related question asked respondents “How familiar are you with the agreements between CBJ and cruise lines limiting the number of ships and passengers per day?” Over half (60%) were *somewhat familiar*, while 19% were *very familiar*, and 20% were *not familiar*.

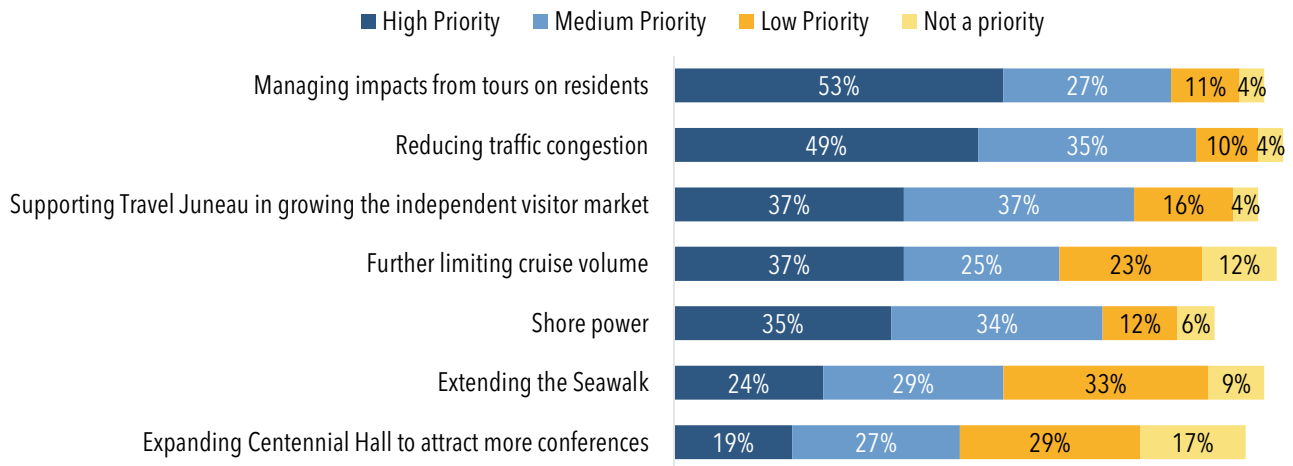
### TREND: Is CBJ doing more than enough, not enough, or just the right amount to manage the impacts of the visitor industry? 2021 to 2024



Note: Excludes “don’t know” responses.

Residents were asked what level priority should be placed on seven different CBJ tourism activities. The highest priority was *managing impacts from tours on residents* (53% said this should be a high priority) followed by *reducing traffic congestion* (49%). Ranked lowest were *expanding Centennial Hall* (19%) and *extending the Seawalk* (24%).

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



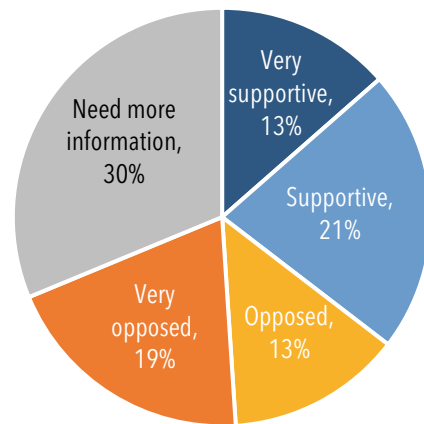
Note: Rows do not add to 100% due to *don't know* responses.

**New Cruise Ship Docks**

The survey asked respondents whether they were supportive or opposed to two cruise ship dock projects currently in the planning stages. Respondents were read statements (see below, left) with details about each project. When asked about the Goldbelt dock project, about one-third of respondents were supportive or very supportive (34%); one-third were opposed or very opposed (32%); and 30% said they needed more information before deciding.

*READ BEFORE QUESTION: In partnership with Royal Caribbean, Goldbelt recently announced plans to build a new cruise development with two ship berths on the backside of Douglas Island where Goldbelt owns land. The project is in the early planning stages with many details yet to be worked out.*

**How supportive or opposed are you to the Goldbelt dock project?**

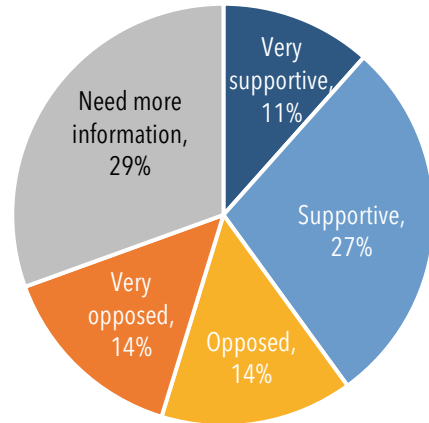


Before sharing their support or opposition to the Huna Totem dock project, respondents were asked about the importance of incorporating various elements into the project. The most important elements were public parking (50% said this was very important), housing (47%), public outdoor space (43%), and public access to the shoreline (42%).

When asked about their support or opposition to the Huna Totem dock project, over one-third of respondents were supportive or very supportive (38%); 28% were opposed or very opposed; and 29% said they needed more information before deciding.

*READ BEFORE QUESTION: Huna Totem Corporation is proposing to develop a cruise ship dock and facility downtown at the Subport, between the Coast Guard base and Gold Creek. The dock would accommodate one large cruise ship and would be subject to existing per-day limits.*

### How supportive or opposed are you to the Huna Totem dock project?



# Introduction and Methodology

## Introduction

The City and Borough of Juneau (CBJ) contracted with McKinley Research 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 fourth consecutive tourism survey of Juneau residents, following similar surveys in 2021, 2022, and 2023; previous surveys were also conducted in 1995, 1998, 2002, and 2006.

## Methodology

The survey was designed by MRG staff in cooperation with CBJ staff. Most 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 2024.

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 501 randomly selected Juneau residents. The survey was conducted between December 2, 2024 and January 2, 2025.

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 12% of the survey respondents; and Downtown/Thane residents represent 11% of the population, compared to 14% of the survey respondents. 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 also weighted by age.

*See table, next page*



**Table 1. Telephone Survey Sample versus Juneau Population**

	Survey Sample (%)	Juneau Population (%)
<b>Gender</b>		
Male	49	51
Female	51	49
Unknown	<1	-
<b>Area of Residence</b>		
Mendenhall Valley	41	46
Salmon Creek/Lemon Creek/Switzer Creek	12	16
Douglas/West Juneau	15	12
Downtown/Thane	14	11
Brotherhood Bridge/Out the Road	11	10
North Douglas	5	5
Other		-
<b>Age</b>		
18-24	6	10
25-34	10	20
35-44	22	17
45-54	18	17
55-64	16	18
65-74	17	12
75+	10	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, 2022, 2023 and 2024. 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 2024 (+335%). The latest season saw a 4% 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	<b>+49%</b>
2002	741,500	<b>+30%</b>
2006	951,400	<b>+28%</b>
2019*	1,305,700	<b>+37%</b>
2022	1,167,000	<b>-11%</b>
2023	1,669,500	<b>+43%</b>
2024	1,732,000	<b>+4%</b>
<b>Change 1995-2024</b>		<b>+355%</b>

\*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. Approximately four in ten respondents (42%) said they experienced both negative and positive impacts. Nearly one-third (29%) said the overall impacts were positive, while 13% said the overall impacts were negative. Another 15% said they experienced no impact at all.

This question yielded the following statistically significant differences by subgroup.

- The main difference by area of residence was a higher likelihood among Douglas/West Juneau residents to report negative impacts at 25%, compared to between 11% and 16% among other residents.
- Residents of the Downtown/Thane and North Douglas areas were more likely to report both positive and negative impacts on their households (55% and 59%, respectively) than residents of other areas.
- Residents from the Creeks, Out the Road, and the Valley were significantly more likely to report no impact on their households (15%, 18%, and 20%, respectively) than all other areas of town which ranged from 1% to 7%.
- Middle-aged (35-54 years) and older (55+ years) residents were more likely to report positive impacts than younger residents (18-34 years): 35% and 31% versus 20%, respectively.
- Households reporting tourism employment were more likely to report positive impacts (38% versus 24%) and less likely to report negative impacts (6% versus 17%).

**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=501	% of Total
Positive impact	29
Negative impact	13
Both negative and positive impacts	42
No impact at all	15
Don't know	1

## Comparing to Past Surveys

Those reporting positive impacts fell from 31% in 2023 to 29% in 2024, while those reporting negative impacts increased from 11% to 13%. No changes were statistically significant year-over-year. The longer-term decline in positive impacts from 40% in 2006 to 29% in 2024 is significant, as is the increase in negative impacts, from 8% in 2021 to 13% in 2024.

**Table 4. TREND: Positive Versus Negative Impacts, 1998 to 2024 (%)**

	1998	2002	2006	2021	2022	2023	2024	Change 2023-24
Positive impact	29	40	40	36	35	31	29	-2
Negative impact	10	6	8	8	7	11	13	+2
Both negative and positive impacts	43	37	34	33	41	46	42	-4
No impact at all	16	15	17	20	16	11	15	+4
Don't know	1	1	1	2	1	<1	1	+1

Note: The wording of the question changed slightly over the years, although there were no changes between 2022, 2023, and 2024. 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?"*

## 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 39%; 28% said the opposite; 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=202	% of Base
Positive impacts outweigh negative	39
Negative impacts outweigh positive	28
Neutral/neither	30
Don't know	3

## Comparing to Past Surveys

Respondents saying the positive outweighs the negative was about the same in 2023 (38%) and 2024 (39%), while those saying the negative outweighs the positive increased from 25% to 28%. None of the year-over-year changes were statistically significant; however, the longer-term drop in those saying the positive outweighs the negatives over the 2021 to 2024 period (from 51% to 39%) is significant.

**Table 6. TREND: Weighing Both Positive and Negative Impacts, 1998 to 2024 (%)**

	1998	2002	2006	2021	2022	2023	2024	Change 2023-24
Positive impacts outweigh negative	45	46	47	51	49	38	39	+1
Negative impacts outweigh positive	32	29	32	30	32	25	28	+3
Neutral/neither	16	16	14	14	12	30	30	-
Don't know	6	8	7	4	5	4	3	-1

Note: In the 1998 through 2006 surveys the wording was "benefits outweigh costs" and "costs outweigh benefits."

## Composite Result

When combining results of the previous two questions, nearly half of respondents (45%) felt that tourism either has an overall positive impact on their household, or the positive impacts outweigh the negative. About one-quarter (26%) felt that either tourism has an overall negative impact on their household, or the negative impacts outweigh the positive.

- Douglas/West Juneau residents were more likely to view tourism negatively at 41%; this compares with 36% of North Douglas residents, 33% of Downtown/Thane residents, 30% of Out the Road residents, 23% of Creeks residents, and 18% of Valley residents.
- Respondents reporting a household member employed in the tourism industry in the last five years were more likely to report (composite) positive impacts at 56%; this compares to 40% of other respondents.

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

n=499	% of Total
<b>Positive TOTAL</b>	<b>45</b>
Positive impact	29
Both; positive impacts outweigh negative	16
<b>Negative TOTAL</b>	<b>26</b>
Negative impact	14
Both; negative impacts outweigh positive	12
No impact at all	15
Neutral/neither	13
Don't know	3

## Comparing to Past Surveys

There were no statistically significant differences in year-over-year responses. But over the last four years of the survey, the decrease in positive responses (from 53% to 45%) is significant, as is the increase in negative responses (from 18% to 26%).

**Table 8. Combined Results: Overall Impacts + Both Positive/Negative Impacts, 2021 to 2024**

	2021	2022	2023	2024	Change 2023-24
<b>Positive TOTAL</b>	<b>53</b>	<b>55</b>	<b>48</b>	<b>45</b>	<b>-3</b>
Positive impact	36	35	31	29	-2
Both; positive impacts outweigh negative	17	20	17	16	-1
<b>Negative TOTAL</b>	<b>18</b>	<b>20</b>	<b>22</b>	<b>26</b>	<b>+4</b>
Negative impact	8	7	11	14	+3
Both; negative impacts outweigh positive	10	13	11	12	+1
No impact at all	20	16	11	15	+4
Neutral/neither	5	5	14	13	-1
Don't know	4	4	4	3	-1

# 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 on sidewalks downtown*, with 39% very affected and 31% somewhat affected, for a total of 70% affected. The next most impactful was *crowding at Mendenhall Glacier*, with 41% very affected and 26% somewhat affected, for a total of 67% affected. Least impactful was *air emissions from cruise ships*: 19% reported being very affected and 22% somewhat affected, for a total of 41% affected.

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

- Younger respondents were more likely to be affected by most types of impacts. For instance, 82% of younger respondents were somewhat or very affected by *crowding on sidewalks downtown*, compared with 69% of middle-aged respondents and 57% of older respondents. Similarly, 56% of younger respondents were affected by *crowding on trails*, compared with 44% of middle-aged respondents and 38% of older respondents.

**Table 9. For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2024? By "affected" we mean changing your use of an area in addition to other kinds of impacts. (%)**

n=501	Very affected	Somewhat affected	Very + Somewhat Affected	Not affected	Don't know
Crowding on sidewalks downtown	39	31	70	28	2
Crowding at Mendenhall Glacier	41	26	67	31	1
Vehicle congestion downtown	35	30	65	33	1
Flightseeing noise	26	28	54	44	1
Vehicle congestion outside of downtown	20	31	51	47	2
Whale watching boat traffic and wakes	26	22	48	47	4
Crowding on trails	17	28	45	51	3
Air emissions from cruise ships	19	22	41	54	4



## Differences by Neighborhood

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

- Downtown/Thane residents were the most affected by *crowding on sidewalks downtown* (81%) followed by North Douglas residents (79%) and Out the Road residents (78%).
- North Douglas residents were the most affected by *crowding at Mendenhall Glacier* (79%) followed by Out the Road residents (77%) and Valley residents (69%).
- North Douglas residents were the most affected by *vehicle congestion downtown* (83% were somewhat or very affected) followed by Out the Road residents (78%) and Downtown/Thane residents (73%).
- North Douglas residents were the most affected by *flightseeing noise* (73%) followed by Douglas/West Juneau residents (67%) and Out the Road residents (61%).
- Out the Road residents were the most affected by *vehicle congestion outside of downtown* (66%) followed by North Douglas residents (64%) and Downtown/Thane residents (54%).
- North Douglas residents were the most affected by *whale watching* (75%); all other neighborhoods showed a much lower rate of being affected (between 42% and 54%).
- North Douglas residents were the most affected by *crowding on trails* (65%) followed by Douglas/West Juneau residents (51%) and Out the Road residents (49%).
- North Douglas residents were the most affected by *air emissions from cruise ships* (73%); all other neighborhoods showed a much lower rate of being affected (between 32% and 55%).

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

	Downtown/ Thane n=70	Douglas/ West Juneau n=75	Creeks n=62	Mend. Valley n=211	North Douglas n=27	Out the Road n=56
Crowding on sidewalks downtown	81	73	67	64	79	78
Crowding at Mendenhall Glacier	66	63	54	69	79	77
Vehicle congestion downtown	73	70	64	57	83	78
Flightseeing noise	58	67	55	46	73	61
Vehicle congestion outside of downtown	54	45	44	49	64	66
Whale watching boat traffic and wakes	51	42	49	46	75	54
Crowding on trails	45	51	41	43	65	49
Air emissions from cruise ships	55	41	41	32	73	51

Only one impact showed a statistically significant difference 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 *air emissions from cruise ships* at 49%; this compares with 30% of those working in the Valley and 39% of those working in the Creeks area.

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

	Downtown/ Thane n=134	Creeks n=51	Mend. Valley n=68
Crowding on sidewalks downtown	73	68	60
Crowding at Mendenhall Glacier	71	63	62
Vehicle congestion downtown	69	54	65
Flightseeing noise	54	41	52
Vehicle congestion outside of downtown	49	52	45
Whale watching boat traffic and wakes	51	41	41
Crowding on trails	43	44	41
Air emissions from cruise ships	49	39	30

## Comparing to Past Surveys

The rate of being affected increased for every type of impact between 2023 and 2024. Some changes were statistically significant year-over-year, while others were only significant over the longer term.

- *Crowding on sidewalks*: affected rate increased from 59% in 2023 to 70% in 2024, a significant difference.
- *Crowding at Mendenhall Glacier*: affected rate increased from 63% to 67%. The year-over-year change was not significant, but the longer term change was: from 57% in 2021 and 2022 to 67% in 2024.
- *Vehicle congestion downtown*: affected rate increased from 61% to 65%. The year-over-year change was not significant, but the longer term change was: from 51% in 2022 to 65% in 2024.
- *Flightseeing noise*: affected rate increased from 43% in 2023 to 54% in 2024, a significant difference.
- *Vehicle congestion outside of downtown*: affected rate increased from 45% to 51% from 2023 to 2024. The longer-term change was significant, from 36% in 2021 to 51% in 2024.
- *Whale watching*: affected rate increased from 47% to 48% between 2023 and 2024. The longer-term change was significant, from 40% in 2022 to 48% in 2024.
- *Crowding on trails*: The yearly change of those affected rate increased from 40% to 45%. The longer-term change was significant, from 34% in 2021 to 45% in 2024.

**Table 12. TREND: Somewhat + Very Affected, 2021 to 2024 (%)**

	2021	2022	2023	2024	Change 2023-24
Crowding on sidewalks downtown	57	56	59	70	+11
Crowding at Mendenhall Glacier	57	57	63	67	+4
Vehicle congestion downtown	57	51	61	65	+4
Flightseeing noise	41	46	43	54	+11
Vehicle congestion outside of downtown	36	42	45	51	+6
Whale watching boat traffic and wakes	41	40	47	48	+1
Crowding on trails	34	38	40	45	+5
Air emissions from cruise ships	36	42	36	41	+5

Note: 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."

# New Cruise Ship Docks

The 2024 survey asked new questions about two planned cruise ship docks.

## Goldbelt Dock Project

Respondents were read the following statement:

*In partnership with Royal Caribbean, Goldbelt recently announced plans to build a new cruise development with two ship berths on the backside of Douglas Island where Goldbelt owns land. The project is in the early planning stages with many details yet to be worked out.*

About one-third of respondents were supportive or very supportive (34%); one-third were opposed or very opposed (32%); and 30% said they needed more information before deciding. Respondents were slightly more likely to be very opposed (19%) compared with very supportive (13%).

- Douglas/West Juneau residents were the most supportive (44%) followed by Valley (39%), Creeks (28%), North Douglas (26%), Out the Road (25%), and Downtown/Thane (25%).
- Conversely, Out the Road residents were the most opposed (47%) followed by Downtown/Thane (42%), Creeks (42%), North Douglas (34%), Douglas/West Juneau (29%), and Valley (23%).
- Men were more likely to be supportive than women (43% versus 25%).

**Table 13. How supportive or opposed are you to the Goldbelt dock project? (%)**

n=501	% of Total
<b>Supportive TOTAL</b>	<b>34</b>
Very supportive	13
Supportive	21
<b>Opposed TOTAL</b>	<b>32</b>
Opposed	13
Very opposed	19
Need more information before deciding	30
Don't know	3

# Huna Totem Dock Project

Respondents were read the following statement:

*Huna Totem Corporation is proposing to develop a cruise ship dock and facility downtown at the Subport, between the Coast Guard base and Gold Creek. The dock would accommodate one large cruise ship and would be subject to existing per-day limits.*

When asked about the importance of a series of elements of the dock project, respondents placed the highest importance on *public parking* (50% very important) followed by *housing* (47%), *public outdoor space* (43%), *public access to the shoreline* (42%), *extension to the Seawalk* (40%), *shore power* (39%), *downtown passenger shuttle* (32%), and *cultural center* (31%).

- *Public parking*: Valley residents were the most likely to say this was very important (56%); Out the Road residents were the least likely (39%).
- *Housing*: Valley residents were the most likely to say this was very important (51%); Downtown/Thane residents were the least likely (33%).
- *Public access to the shoreline*: North Douglas residents were the most likely to say this was very important (64%); Valley residents were the least likely (38%).
- *Shore power*: North Douglas residents were the most likely to say this was very important (55%); Creeks residents were the least likely (25%).
- *Downtown passenger shuttle*: Out the Road residents were the most likely to say this was very important (45%); Downtown/Thane and Douglas/West Juneau residents were the least likely (25%).
- *Cultural Center*: Douglas/West Juneau residents were the most likely to say this was very important (40%); Out the Road residents were the least likely (18%).

**Table 14. If the dock is constructed, how important are each of the following elements to include? (%)**

n=501	Very Important	Somewhat Important	Not Important	Don't know
Public parking	50	29	13	5
Housing	47	17	26	7
Public outdoor space	43	32	17	6
Public access to the shoreline	42	25	22	8
Extension to the Seawalk	40	24	26	7
Shore power	39	33	14	11
Downtown passenger shuttle	32	35	22	8
Cultural center	31	32	29	6
Meeting space	9	38	43	8

Over one-third of respondents (38%) were supportive or very supportive of the Huna Totem dock project; 28% were opposed or very opposed; and 29% said they needed more information before deciding. There were no statistically significant differences in responses by neighborhood.

- Middle-aged and older respondents were more likely to be supportive (44% and 40%, respectively) compared to younger respondents (31%).
- Men were more likely than women to be supportive (43% versus 34%).

**Table 15. How supportive or opposed are you to the Huna Totem dock project? (%)**

n=501	% of Total
<b>Supportive TOTAL</b>	<b>38</b>
Very supportive	11
Supportive	27
<b>Opposed TOTAL</b>	<b>28</b>
Opposed	14
Very opposed	14
Need more information before deciding	29
Don't know	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* (54%) followed by *just the right amount* (33%). Only 4% said they were doing *more than enough*, and 9% didn't know.

- Residents of Douglas/West Juneau (69%), North Douglas (67%), and Downtown/Thane (62%) were more likely to say CBJ was not doing enough; this compares with residents of Out the Road (58%), Creeks (52%), and the Valley (47%).

**Table 16. 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	54
Just the right amount	33
Don't know	9

## Comparing to Past Surveys

There were no statistically significant changes between 2023 and 2024.

**Table 17. TREND: CBJ Tourism Management, 2021 to 2024 (%)**

	2021	2022	2023	2024	Change 2023-24
More than enough	7	4	4	4	-
Not enough	45	45	56	54	-2
Just the right amount	39	41	33	33	-
Don't know	9	10	7	9	+2

## Familiarity with CBJ-Cruise Line Agreements

A new question in 2024 asked respondents how familiar they were with the agreements between CBJ and cruise lines to limit passengers and ships. The most common response was “somewhat familiar” (60%) with about one-fifth saying they were either very familiar (19%) or not familiar (20%).

- Residents of Creeks and the Valley were most likely to be unfamiliar at 26% and 27%, respectively. This compares to 18% of North Douglas residents, 11% of Out the Road residents, 7% of Downtown/Thane residents, and 6% of Douglas/West Juneau residents.
- Older respondents were more likely to be very familiar at 24%; this compares with 19% of younger respondents and 15% of middle-aged respondents.

**Table 18. How familiar are you with the agreements between CBJ and cruise lines limiting the number of ships and passengers per day? (%)**

n=501	% of Total
Very familiar	19
Somewhat familiar	60
Not familiar	20



# Tourism Best Management Practices

## TBMP Awareness

Respondents were asked how familiar they were with the Tourism Best Management Practices (TBMP) program. Over half of respondents (57%) were not familiar; 25% were somewhat familiar; and 17% were very familiar.

- Valley and Creeks residents were more likely to be unfamiliar at 66% and 61%, respectively.
- Men were more likely to be somewhat or very familiar (49%) compared with women (34%).

**Table 19. 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=501	% of Total
Very familiar	17
Somewhat familiar	25
Not familiar	57
Don't know/refused	2

## Comparing to Past Surveys

Familiarity with TBMP increased in 2024: 42% somewhat or very familiar, up from 36% in 2023.

**Table 20. TREND: CBJ Tourism Management, 2021, 2022, 2023, 2024 (%)**

	2021	2022	2023	2024	Change 2023-24
Very familiar	14	16	14	17	+3
Somewhat familiar	32	26	22	25	+3
Not familiar	54	57	62	57	-5

## TBMP Effectiveness

Among those somewhat or very aware of TBMP, 14% said the program was very effective; 49% said it was somewhat effective; and 21% said it was not effective.

**Table 21. 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=216	% of Base
Very effective	14
Somewhat effective	49
Not effective	21
Don't know/not aware	16

### Comparing to Past Surveys

The percentage of respondents saying TBMP was not effective dropped from 27% in 2023 to 21% in 2024, although this change was not statistically significant.

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 22. TREND: Effectiveness of TBMP, 2022 to 2024 (%)**

	2022	2023	2024	Change 2023-24
Very effective	17	15	14	-1
Somewhat effective	52	49	49	-
Not effective	15	27	21	-6
Don't know/not aware	16	9	16	+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 *managing impacts from tours on residents* (53% said this should be high priority) and *reducing traffic congestion* (49%), followed by *supporting Travel Juneau in growing the independent visitor market* (37%) and *further limiting cruise volume* (37%). There were several statistically significant differences between subgroups.

- *Further limiting cruise volume*: North Douglas residents were the most likely to say this was a high priority (71%) followed by Out the Road (51%), Douglas/West Juneau (45%), Downtown/Thane (37%), Valley (30%), and Creeks (29%).
- *Shore power*: North Douglas residents were the most likely to say this was a high priority (56%) followed by Douglas/West Juneau (44%), Out the Road (43%), Downtown/Thane (42%), Valley (31%), and Creeks (23%).
- *Supporting Travel Juneau in growing the independent visitor market*: North Douglas residents were the most likely to say this was a high priority (58%) followed by Out the Road (47%), Douglas/West Juneau (40%), Valley (37%), Creeks (29%), and Downtown/Thane (21%).

**Table 23. Should the CBJ Tourism Department place a high priority, medium priority, or low priority on each of the following items? (%)**

n=501	High Priority	Medium Priority	Low Priority	Not a Priority	Don't know
Managing impacts from tours on residents	53	27	11	4	4
Reducing traffic congestion	49	35	10	4	2
Supporting Travel Juneau in growing the independent visitor market	37	37	16	4	6
Further limiting cruise volume	37	25	23	12	3
Shore power	35	34	12	6	13
Extending the Seawalk	24	29	33	9	4
Expanding Centennial Hall to attract more conferences	19	27	29	17	7

When asked which priority was most important, the number one response was *managing impacts from tours on residents* (30%) followed by *further limiting cruise volume* (20%) and *reducing traffic congestion* (15%).

- North Douglas residents were the most likely to select *further limiting cruise volume* (44%) followed by Douglas/West Juneau (29%), Out the Road (27%), Downtown/Thane (18%), Valley (16%), and Creeks (14%).
- Creeks residents were the most likely to select *reducing traffic congestion* (28%) followed by Downtown/Thane (19%), Valley (13%), North Douglas (11%), Douglas/West Juneau (10%), and Out the Road (8%).

**Table 24. Of the priorities I just mentioned, which one do you think is MOST important? (%)**

n=501	% of Total
Managing impacts from tours on residents	30
Further limiting cruise volume	20
Reducing traffic congestion	15
Shore power	9
Supporting Travel Juneau in growing the independent visitor market	9
Extending the Seawalk	6
Expanding Centennial Hall to attract more conferences	5
Don't know	6

## Comparing to Past Surveys

The largest change in responses between 2023 and 2024 was for *managing impacts from tours on residents*, rated as high priority by 38% of respondents in 2023 and 53% in 2024. However, the phrase “throughout the borough” was removed for the 2024 survey, which likely explains some of the increase. *Reducing traffic congestion* also saw an increase in high priority responses, from 42% to 49%; this change was statistically significant.

**Table 25. TREND: CBJ Tourism Priorities, “High Priority”, 2023 to 2024 (%)**

	2023	2024	Change 2023-24
Managing impacts from tours on residents*	38	53	+15
Reducing traffic congestion	42	49	+7
Supporting Travel Juneau in growing the independent visitor market	39	37	-2
Further limiting cruise volume	34	37	+3
Shore power	40	35	-5
Extending the Seawalk	25	24	-1
Expanding Centennial Hall to attract more conferences**	22	19	-3

\*The 2023 survey used the phrase “managing impacts from tours on residents throughout the Borough.”

\*\*The 2023 used the word “renovating” rather than “expanding.”

Similar to the previous trend table, *managing impacts from tours on residents* saw the biggest change between 2023 and 2024 responses (from 23% to 30%), but the change in question wording may have influenced responses. No other changes were statistically significant.

**Table 26. TREND: CBJ Tourism Priorities, “Most Important Priority,” 2023 to 2024 (%)**

	2023	2024	Change 2023-24
Managing impacts from tours on residents*	23	30	+7
Further limiting cruise volume	15	20	+5
Reducing traffic congestion	18	15	-3
Shore power	11	9	-2
Supporting Travel Juneau in growing the independent visitor market	10	9	-1
Extending the Seawalk	8	6	-2
Expanding Centennial Hall to attract more conferences**	5	5	-

\*The 2023 survey used the phrase “managing impacts from tours on residents throughout the Borough.”

\*\*The 2023 used the word “renovating” rather than “expanding.”

# Juneau Whale Watch Industry

A new question in 2024 asked respondents whether they were concerned about Juneau’s whale watch industry; 61% answered affirmatively.

- Out the Road residents were the most concerned (77%) followed by Douglas/West Juneau (63%), Creeks (63%), Downtown/Thane (62%), Valley (56%), and North Douglas (54%).
- Women were more likely to be concerned than men (67% versus 54%).

**Table 27. Are you concerned about Juneau’s whale watch industry? (%)**

n=501	% of Total
Yes	61
No	35
Don't know	4

When asked for their main concerns, respondents were most concerned about impacts to whales/wildlife (79%) and the number of boats on the water (64%). Other frequently mentioned concerns were number of boats at the harbor (27%), wakes (15%), and noise (11%).

**Table 28. What are your main concerns? (%)**

Base: Concerned about Juneau’s whale watch industry  
Multiple responses allowed

n=305	% of Base
Impacts to whales/wildlife	79
Number of boats on the water	64
Number of boats at harbor	27
Wakes	15
Noise	11
Other*	12
Don't know	3

\*A list of “other” responses can be found in the Appendix.

# Tourism Employment

One-third of respondents (32%) said that they or a member of their household had been employed in the Juneau tourism industry sometime in the past five years.

**Table 29. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years? (%)**

n=501	% of Total
Yes	32
No	68

Among those reporting a household member employed in tourism, the average number of household members employed in tourism was 1.7 people.

**Table 30. How many people? (%)**  
Base: Household member employed in tourism

n=143	% of Base
1	62
2	24
3	6
4+	6
<b>Average</b>	<b>1.7 people</b>

## Comparing to Past Surveys

The percentage of people saying a household member was or had been employed in tourism increased from 20% in 2023 to 32% in 2024 - matching the 2021 rate (32%). The average number of household members employed increased from 1.6 to 1.7.

**Table 31. TREND: Household Member Employed in Juneau Tourism 2021 to 2024**

	2021	2022	2023	2024	Change 2023-24
Household member employed	32%	38%	20%	32%	<b>+12%</b>
Average number	1.5 people	1.8 people	1.6 people	1.7 people	<b>+0.1 people</b>

# 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 (42%) followed by Douglas/West Juneau (15%), Downtown/Thane (14%), Salmon Creek/Lemon Creek/Switzer Creek (12%), Brotherhood Bridge/Out the Road (11%), and North Douglas (5%).

Respondents who reported being employed were most likely to work in Downtown/Thane (40%) followed by the Valley (20%) and Creeks (15%).

**Table 32. 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=501 LIVE % of Total	n=337 WORK % of Those Employed
Mendenhall Valley	42	20
Douglas/West Juneau	15	6
Downtown/Thane	14	40
Salmon Creek/Lemon Creek/Switzer Creek	12	15
Brotherhood Bridge/Out the Road	11	4
North Douglas	5	1
Outside of city	n/a	3
Borough-wide	n/a	11

**Table 33. Are you currently employed? (%)  
UNWEIGHTED**

n=501	% of Total
Yes	68
No	31
Don't know/refused	1



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 34. Gender  
UNWEIGHTED**

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

Respondents reported an average age of 52 years.

**Table 35. Age  
UNWEIGHTED**

n=486	% of Total
18-24	6
25-34	10
35-44	22
45-54	18
55-64	16
65-74	17
75+	10
<b>Average age</b>	<b>52 years old</b>

Respondents were most likely to report their race/ethnicity as White or Caucasian (76%) followed by Alaska Native/American Indian (14%). Respondents were allowed more than one response.

**Table 36. Race/Ethnicity  
UNWEIGHTED**

n=499	% of Total
White/Caucasian	76
Alaska Native/American Indian	14
Latino/Hispanic	4
Asian/Filipino	3
Black/African-American	3
Hawaiian/Pacific Islander	1
Other	1
Don't know	1
Refused	7

# Appendix

Following are three sets of comments from respondents:

- Comments regarding CBJ tourism priorities
- General comments shared throughout survey
- “Other” responses to the question about whale watching concerns.

## Comments on CBJ Tourism Priorities

Respondents were not directly asked for comments but many voiced suggestions after the question asking: “Of the priorities I just mentioned, which one do you think is MOST important?”

- A noise study on helicopters is necessary to find best pathways or altitudes to lessen the noise.
- Against bike tours to valley completely unsafe.
- Also fewer ships
- Balance of crowding concerns residents and tourists. Tourists don't like being crowded either. Coming from server from Hanger.
- Board of city only cares about profit not the residents
- Build Gondola to high alpine from Mt Bullard from Visitor Center
- Busses are overcrowded during cruise season.
- Cannot get on buses
- Cap number of boats for tours
- Cap number of boats on the water
- CBJ needs to be resident focused and not tourist focused.
- CBJ needs to be transparent about where and how tourist revenue is spent.
- City is run by the tour boat industry
- Concentrate on childcare and housing
- Concerned about CBJ spending
- Concerned about Juneau Douglas bridge traffic
- Concerned about recreational users' ability to navigate waters due to more ships.
- Cruise ship and business taxes needs to be spent on highway infrastructure around Douglas and Juneau
- Extend the Seawalk
- Fix bus stop at Loop and Back loop. Move it out of cross section. Install a cheaper bus for visitors
- Get paid for shore power and need more info on it
- Helicopter schedules and paths should be made available so that locals can avoid hiking during those times.
- How is the head tax being used?

- I voted yes on ship free Saturday even if it was a poorly rewritten. Wanted to limit cruise passengers and how many cruise ships were in Juneau.
- If it wasn't all downtown and more spread out
- Impossible to use public transportation during ship season.
- Increase revenue not taxes
- It is insufferable during the summer for all residents. Business owners that are here for summer make their money and leave.
- Juneau needs to be compensated more by the cruise ship industry. Charge more.
- Just concerned with any current projects and all new projects regarding building new tour ship docks costing the residents money. Currently because of the tour industry every person entering the glacier has to pay an entrance fee. When before recent changes residents did not have to pay to enter the glacier.
- Limiting tourists use of public transportation
- Money does not stay in town
- Need strict traffic passenger loading area rules for non-commercial vehicles
- Needing parking for locals.
- Not discussing the impacts to the hospital with the influx of tourists in the summer
- Not enough buses for locals to get to work. Visitors take up seats.
- Not enough local's own businesses. Need permanent crosswalk people.
- Parking needed downtown.
- Public buses too crowded with tourists for locals to get to work and seniors are not respected
- Public transportation is meant for residents not for tourists that want a free tour.
- Residents are paying too high of a price and can't live comfortably during cruise ship season
- Shore power because of pollution
- Summers in Juneau are no longer fun for residents.
- TBMP complete waste of time and money. Don't get any response when sending in recommendations for change.
- Too many ships! Too much traffic
- Traffic in Douglas will be too high
- Whale population increased during Covid because of dearth of boats out in water.
- Worried about complaints having adverse impact on tourism
- Would be interesting seeing the coast guard sharing a dock
- Would be nice to see an extension of the seawalk

## General Comments

- Actively consider leaving Juneau after 25 years because of the cruise ship industry and its negative impacts (hourly, daily all the time of our lives here). Air traffic, affects shopping when there's no choice at A&P, boating traffic, congestion in downtown. Stopped going into town because of crowding. Costco buses with crew creating long lines and crowding in the store. Helicopter traffic dramatically reduces the number of trails we hike in the summer. Plane traffic overhead to, tours, basically affecting enjoying outdoor activities in our yard (gardening, reading a book, talking on the phone, hanging with

- friends, etc.). The cruise industry values dozens of jewelry shops and knick-knack stores over marine education centers where people can learn about the environment and wildlife they chose to visit.
- Add more public bathrooms for tours and general public.
  - Adverse impact on local trails from local garbage dumping
  - Against bike tours going to the glacier and Auke Bay. No paths or sidewalks. Dangerous. Find another solution or cancel tourist bike service to valley.
  - Am supportive for new additions to downtown tour dock also feel like we would need more public areas to facilitate the additional volume of visitors
  - CBJ needs to be more transparent about where and how cruise ship money they receive is spent.
  - City needs to move congestion out of downtown to some other geographic location
  - Concerned about NOAA Regulations not being honored.
  - Concerned with how much money CBJ is spending. Needs to leave some in savings for emergencies.
  - Cruise ships make us money
  - Cruise ships should not be allowed to own land downtown. CBJ should ensure that the majority of downtown businesses are locally owned and operated.
  - Don't trust the assembly
  - Expressed early in call that he believes the tourism department should be defunded and that tourism needs to increased without trying to curb the negative effects. His concern with the whaling is the wake from big boats
  - Feel the tour industry shouldn't expand
  - Fewer whale watching boats
  - Fix this bus problem. When locals can't get to work this is a serious impact
  - Get tourists off the buses. My son has missed work because of this problem
  - Concerned with whale industry causing water pollution from boats. Thinks that expanding Centennial Hall would have the most overall benefits to bring in concerts, tourism with the least negative impact on resident
  - Important to put in a second bridge. The CBJ should take care of the people within their jurisdiction.
  - Internet and phone service needs to improve in summer
  - Juneau would be nothing without tourism.
  - Love the tour industry! I feel if we didn't have it then "we would be washing each other's laundry." and don't want that type of situation to be our future.
  - My kids work in the tourism sector in the summer
  - Need more extended medical care for recovering cruise ship passengers; more boats for whale watching charters; more educational events for cruise ship passengers.
  - Need restrooms on Basin Rd. Extensive fecal matter near water source
  - No further numbers of tourists at Eagle Beach, Auke Bay or the Glacier.
  - No more docks
  - No timber left so tourism is where the money is
  - Only supportive of the Goldbelt project if another crossing, bridge or tunnel, is put in.
  - Reduce the number of cruise ships coming into harbor; 40k tourist in summer is too many
  - Seniors in wheelchairs cannot access busses in summer.
  - TBMP is a false front to make people feel good but it has not accomplished anything. Quality of life of locals and quality of experience of tourists needs balance.
  - The downtown tour area is in need of more public bathrooms the tour ships coming in provide lots of money that personally affects our family members and love to see more additions and improvements

- The environmental impacts needs to be number one
- The invalid and elderly population are not taken into account.
- There needs to be a limit on downtown business ownership by non-residents.
- They hope there is not any more things costing local residents money
- They need to issue fewer whale watching permits
- Too many Uber, Lyft, rideshare downtown creates unsafe environment and not carrying commercial insurance.
- Very worried that cruise ships have caused increasing in housing or no housing anymore. And in general cruise ships have gotten away with far more negative effects than any other extraction industry in the past 5 years
- Whale concerns volume of boats impacting the quality of life whales
- Why are we telling Native Corporations what to do with their land?

## Whale Watching Concerns

Respondents were asked “Are you concerned about Juneau’s whale watch industry?” Following are “other” responses.

### Regulation and Oversight

- Needs to be regulated like IFQs.
- Needs oversight; NOAA needs to set permits.
- No regulations, no limits on the number of boats.
- It needs to be regulated more.
- Regulate the industry.
- Regulate.
- Regulations on boats.
- Lack of concern for regulation.
- People break rules too often.
- Do not follow rules.
- Voucher, quota; formalize best practices.
- Local business owners follow rules more than big business owners.

### Impacts on Whales

- Foraging, movement, and communication of whales affected by the noise of boats.
- Keep boats further away from whales.
- Whales are too impacted by too many boats; not following federal regulations and are crowding.
- Whales never left alone; huge wakes; should be regulated.
- Whales too used to people in unnatural ways.
- Not as many whales as before.
- Don’t see whales as often.
- At least 1,000 ft buffer zone for whales with enforcement.
- Larger boats and fewer boats to reduce impact.

- During the pandemic, the whale population increased by 30%.
- Concerned about whale watching boats actually shutting off engines while watching whales.

### **Tourism and Boats**

- Caps on the number of boats.
- Too much dock space and harbor dedicated to whale-watching boats, taking up ramps used by locals.
- Need to move whale-watching boats to other locations.
- Tourist seasons getting longer and longer.
- Concentration of boats in specific areas.
- Larger boats and fewer boats preferred.
- Whale-watching boats get in the way of commercial fishing.
- Whales are never left alone due to constant boat presence.

### **Environmental Concerns**

- Trash and sewage leaking.
- Cruise waste.
- Waste and trash going into the water.
- Water quality concerns.
- Whale foraging and movement affected by noise pollution.

### **Local Impact**

- Subsistence impacted by tourism and boating.
- Outside labor taking housing, leaving locals with no place to live.
- Impacts residents in multiple ways.
- Too much harbor space dedicated to whale-watching boats instead of local needs.
- Whale-watching boats interfere with commercial fisheries.

### **Safety and Infrastructure**

- More safety features needed to protect small boats.
- Too much dock and harbor space dedicated to whale-watching boats, leaving less for local boats.

## **Survey Instrument**

See attached.

## Juneau Visitor Industry Survey 2024

1. Do you currently live in Juneau? 01 Yes 02 No
2. Did you live in Juneau this past summer? 01 Yes 02 No
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?
  - 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 2024? By "affected" we mean changing your use of an area in addition to other kinds of impacts.

ROTATE	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 03 Not familiar (skip to Q9)
  - 02 Somewhat familiar 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                      03 Not effective
- 02 Somewhat effective            04 DK/Refused

**9. How familiar are you with the agreements between CBJ and cruise lines limiting the number of ships and passengers per day? [Read 1-3]**

- 01 Very familiar                      03 Not familiar
- 02 Somewhat familiar            04 Refused

**10. Should the CBJ Tourism Department 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	Don't Know	Ref- used
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. Expanding Centennial Hall to attract more conferences	1	2	3	4	5	6
g. Managing impacts from tours on residents	1	2	3	4	5	6

**11. Of the priorities I just mentioned, which one do you think is MOST important?**

- 1 Shore power
- 2 Reducing traffic congestion
- 3 Extending the Seawalk
- 4 Further limiting cruise volume
- 5 Supporting Travel Juneau in growing the independent visitor market
- 6 Expanding Centennial Hall to attract more conferences
- 7 Managing impacts from tours on residents
- 8 Don't know
- 9 Refuse

**12. ENTER COMMENTS IF ANY OFFERED – DON'T ASK**

- 01 No comment

**13. Are you concerned about Juneau's whale watch industry?**

- 01 Yes                                      03 Don't know (skip to READ)
- 02 No (skip to READ)            04 Refused (skip to READ)



**14. What are your main concerns?** [Do not read, check all that apply]

- |                                 |               |
|---------------------------------|---------------|
| 1. Impacts to whales/wildlife   | 5. Noise      |
| 2. Wakes                        | 6. Don't know |
| 3. Number of boats at harbor    | 7. Refused    |
| 4. Number of boats on the water |               |
| 8. Other _____                  |               |

[READ] In partnership with Royal Caribbean, Goldbelt recently announced plans to build a new cruise development with two ship berths on the backside of Douglas Island where Goldbelt owns land. The project is in the early planning stages with many details yet to be worked out.

**15. How supportive or opposed are you to the Goldbelt dock project?** [Read 1-5]

- |                    |                 |                                          |
|--------------------|-----------------|------------------------------------------|
| 01 Very supportive | 03 Opposed      | 05 Need more information before deciding |
| 02 Supportive      | 04 Very opposed | 06 Don't know 07 Refused                 |

**READ: Huna Totem Corporation is proposing to develop a cruise ship dock and facility downtown, between the Coast Guard base and Gold Creek. The dock would accommodate one large cruise ship and would be subject to existing per-day limits.**

**16. If the dock is constructed, how important are each of the following to include? Very important, somewhat important, or not important.**

ROTATE	Very important	Somewhat important	Not important	Don't Know	Ref-used
a. Extension to the Seawalk	1	2	3	4	5
b. Cultural Center	1	2	3	4	5
c. Public parking	1	2	3	4	5
d. Public outdoor space	1	2	3	4	5
e. Housing	1	2	3	4	5
f. Meeting space	1	2	3	4	5
g. Downtown passenger shuttle	1	2	3	4	5
h. Public access to the shoreline	1	2	3	4	5
i. Shore power	1	2	3	4	5

**17. How supportive or opposed are you to the Huna Totem dock project?** [Read 1-5]

- |                    |                 |                                          |
|--------------------|-----------------|------------------------------------------|
| 01 Very supportive | 03 Opposed      | 05 Need more information before deciding |
| 02 Supportive      | 04 Very opposed | 06 Don't know 07 Refused                 |

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

**18. In what year were you born?** \_\_\_\_\_ 1900 for refuse

**19. 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 _____                            |                                    |

**20. Are you currently employed?** 01 Yes 02 No (Skip to Q22) 03 DK/ref. (Skip to Q22)

**21. 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 _____                            |                                    |

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

- 01 Yes, How many# \_\_\_\_\_ 02 No

**23. What race or ethnicity do you consider yourself?** [Do not read; check all that apply]

- |                                 |                   |
|---------------------------------|-------------------|
| 1 Alaska Native/American Indian | 5 Latino/Hispanic |
| 2 Asian/Filipino                | 6 White/Caucasian |
| 3 Black/African-American        | 7 Don't know      |
| 4 Hawaiian/Pacific Islander     | 8 Refused         |
|                                 | 9 Other           |

***Thank and end survey***

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

**25. [Write additional comments only if shared]**

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**26. Phone #** \_\_\_\_\_ **Data entered initials** \_\_\_\_\_

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