McKINLEY RESEARCH
GROUP, LLC

Formerly McDowell Group

JUNEAU TOURISM SURVEY
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PREPARED FOR:

City and Borough of Juneau

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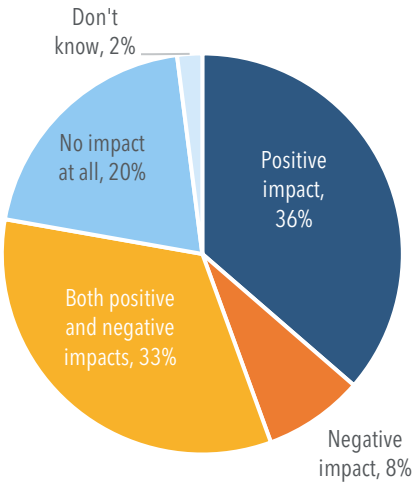
Executive Summary

The City and Borough of Juneau contracted with McKinley Research Group (formerly McDowell Group) to conduct a public opinion survey of Juneau residents regarding tourism. The telephone survey consisted of 506 randomly selected Juneau residents. To qualify for the survey, residents had to have resided in Juneau in the summer of 2019 (the last regular visitor season, pre-pandemic). The survey sample closely resembled Juneau's population in terms of gender and neighborhood. Residents in the oldest age group were more likely to participate, while residents in the youngest age group were less likely; data was therefore weighted by age to reflect population characteristics, following standard industry practice for public opinion surveys. Following are main findings of the telephone survey.

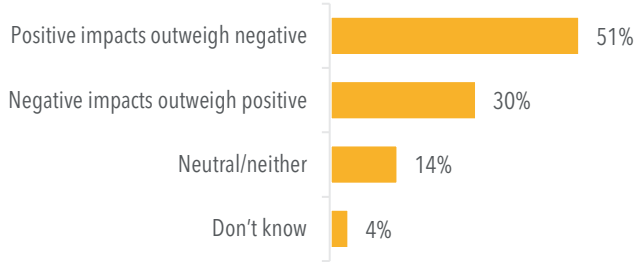
Overall Impacts: Positive vs. Negative

When phone respondents were asked whether the visitor industry had an overall positive or negative impact on their household in 2019, over one-third (36%) said there was a positive impact; 8% said there was a negative impact; 33% said there were both positive and negative impacts; and 20% said there was no impact at all. Those that answered "both" were asked whether the positive outweighed the negative or vice versa; these respondents were more likely to say the positive outweighed the negative (51%) than the reverse (30%).

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?

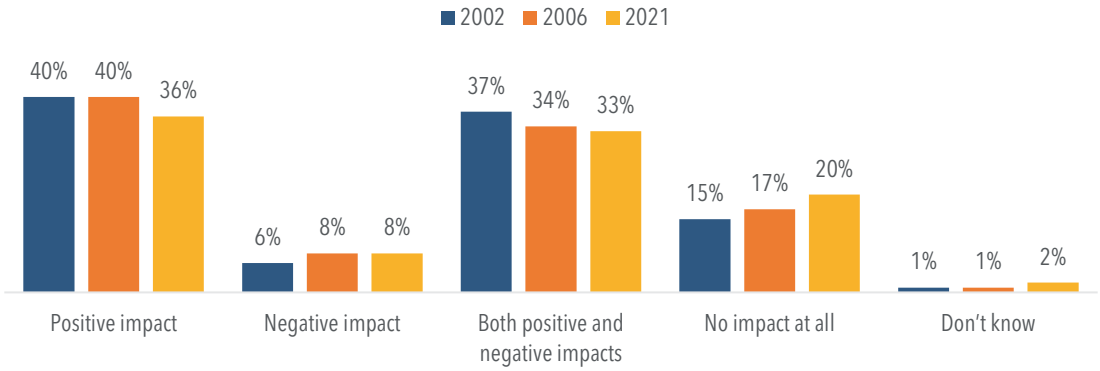


Among those who responded "Both:" Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



Comparing 2021 phone survey results to a similar question in 2002 and 2006 phone surveys (also conducted by McKinley Research Group) reveals very little change over the three surveys.

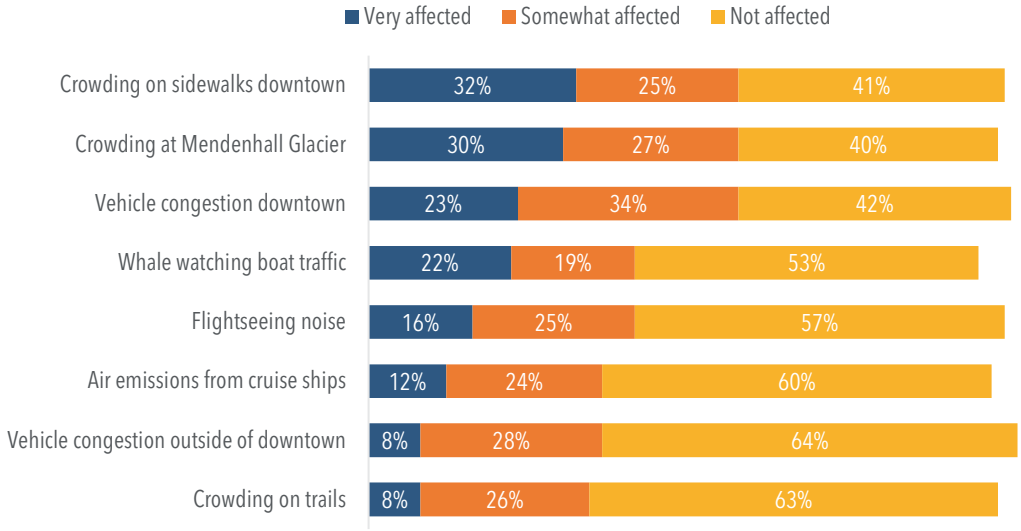
Comparison: Overall Impact of Tourism on Households, 2002, 2006, 2021



Specific Impacts

Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2019. Respondents were most likely to be affected by crowding on sidewalks downtown (57% were somewhat or very affected), crowding at Mendenhall Glacier (57%), and vehicle congestion downtown (57%).

For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2019?



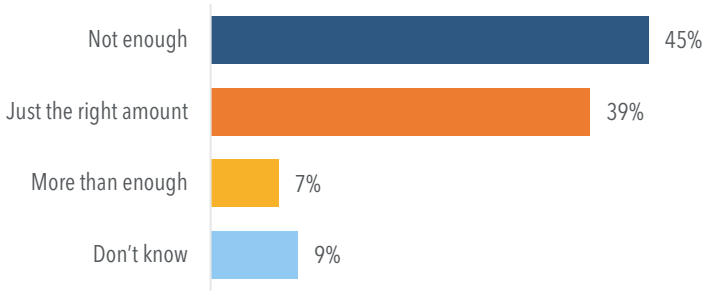
Note: Rows do not add to 100% due to don't know responses.

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 (39%) and more than enough (7%).

The same question in 2006 generated nearly identical results with differences of 1% 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?

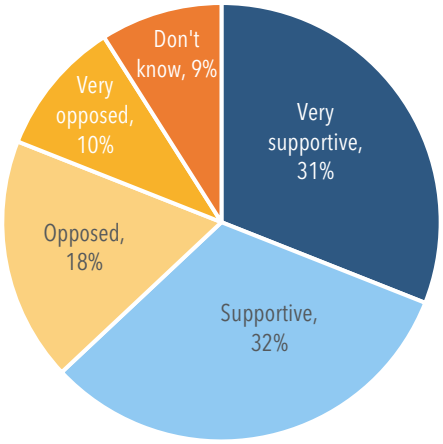


Number of Cruise Ships

Nearly two-thirds of respondents (63%) were supportive of CBJ working to limit the number of large ships per day in Juneau's harbor, including 31% who were *very* supportive. About one-quarter (28%) were opposed, including 10% who were *very* opposed.

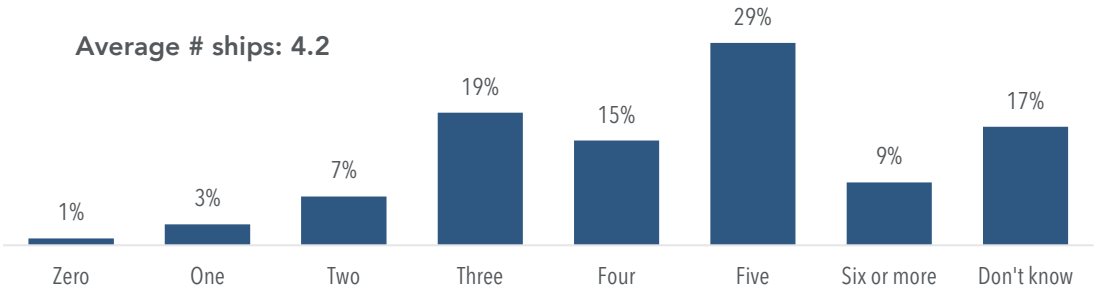
A follow-up question asked: *If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?* The average number of cruise ships suggested was 4.2 ships. This average number exactly matches the average suggested in the 2006 survey when respondents were asked for an "optimal" number of daily cruise ships.

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?



*Defined as 500 passengers or larger.

If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?



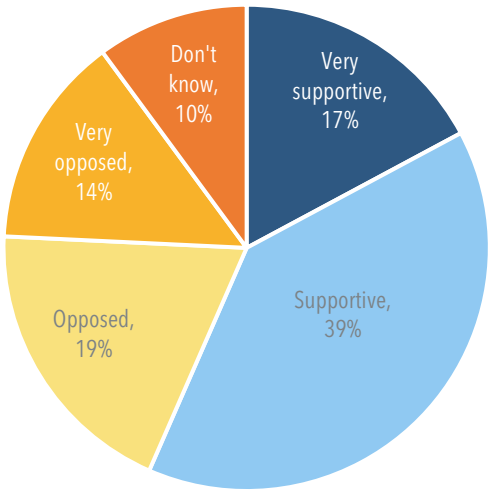
New Dock Construction

Respondents were read the following statement before the next question:

Norwegian Cruise Lines purchased land at the Subport, between the Coast Guard base and Gold Creek, to develop a dock for large cruise ships. The dock is currently designed for one side to be used by large cruise ships and the other side by the US Coast Guard and Fish and Wildlife Service.

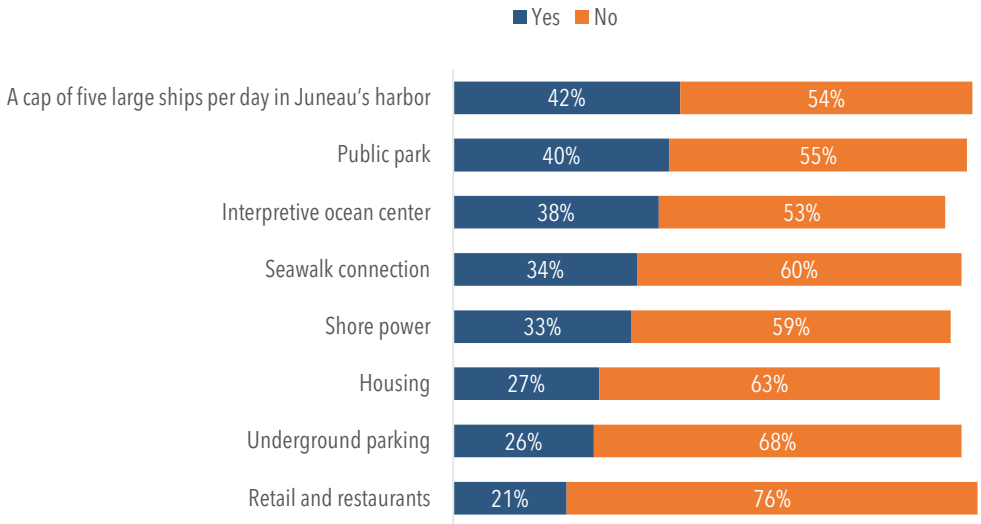
Over one-half of respondents (56%) were supportive of NCL constructing a new dock, while 33% were opposed. About equal numbers felt strongly: 17% were *very* supportive, while 14% were *very* opposed.

Are you very supportive, supportive, opposed, or very opposed to Norwegian Cruise Line constructing a new cruise ship dock at the subport?



Those that said they were opposed or very opposed to the new dock were asked whether a series of factors would increase their level of support. The factors most likely to increase support were a cap of five large ships a day (42% said their support would increase), followed by a public park (40%), interpretive ocean center (38%), and a Seawalk connection (34%). Retail and restaurants were the least likely to increase support, although 21% still said their support would increase with this element.

(If Opposed or Very Opposed) Would your level of support increase if the dock project incorporated any of the following elements?



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

Online Survey

An online survey was conducted after the telephone survey in order to allow all residents an opportunity to express their opinions on tourism. The questions were the same for both surveys. The online survey was open for three weeks and resulted in 1,924 responses. Results can be found in the "Online Survey Results" chapter. Because the survey sample was self-selected rather than randomly selected, the results should not be seen as statistically representative of Juneau's population. Please see the Methodology section for more detail.

Introduction and Methodology

Introduction

The City and Borough of Juneau contracted with McKinley Research Group (formerly McDowell Group) to conduct a public opinion survey of Juneau residents. The objective of the survey was to gather opinions on a range of tourism-related issues and determine how those opinions have changed over time. Results will help inform CBJ's tourism management and planning efforts. This was the first such survey conducted in Juneau since 2006; previous surveys were also conducted in 1995, 1998, and 2002.

Methodology

The survey was designed by McKinley Research Group staff in cooperation with CBJ staff. Many questions from the previous surveys were repeated in order to gauge trends. The survey was conducted via two methods: telephone and online.

Both surveys had two screening questions: to qualify for the survey, respondents had to be a current Juneau resident, and had to have resided in Juneau in summer 2019. (The second screener was included because many of the questions referred to impacts from the last regular visitor season, pre-pandemic.)

Telephone Survey

The telephone 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 506 randomly selected Juneau residents. The survey was conducted in the first two weeks of September 2021.

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

The telephone sample was compared to Juneau's adult population for gender, age, and area of residence. The two populations were very similar in terms of gender and area of residence, as seen in the following table. As with most random telephone surveys, residents in the oldest age group were more likely to participate than residents in the youngest age group; survey data was therefore weighted by age in order to maximize representativeness.

Table 1. Telephone Survey Sample versus Juneau Population

	Survey Sample (%)	Juneau Population (%)
Gender		
Male	52	51
Female	45	49
Unknown	3	n/a
Area of Residence		
Mendenhall Valley	44	45
Salmon Creek/Lemon Creek/Switzer Creek	10	15
Douglas/West Juneau	15	12
Downtown/Thane	12	11
Brotherhood Bridge/Out the Road	10	11
North Douglas	7	5
Other	1	-
Age		
18-34	15	26
35-44	17	19
45-54	19	17
55-64	18	19
65+	32	19

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, and 2006. 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*	2021
Volume	380,600	568,500	741,500	951,400	1,305,700	115,000

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

Online Survey

An online survey was incorporated into the project to allow all residents an opportunity to express their views, not just those randomly selected in the telephone survey.

The online survey closely resembled the telephone survey, with a few minor changes in wording to reflect the change from telephone to online format. The survey was conducted between September 22 and October 15 (after the close of the phone survey) via a publicly available web link. CBJ sent press releases to 12 media outlets, seven community groups with mailing lists, all local neighborhood associations, and all CBJ employees, board chairs and liaisons, and representatives of the Assembly and School Board.

A total of 1,924 residents participated in the online survey. The survey landing page requested that phone survey participants refrain from participating. However, some phone survey respondents may have participated anyway. A small number of duplicate surveys were removed by examining metadata (such as IP address, operating systems and browser, time and date stamps, and identical fillform data) collected when a respondent completed the survey.

Because the online survey represents a self-selected sample rather than a random sample, results should not be considered statistically representative of Juneau's adult population (unlike the phone survey). Residents who felt strongly about tourism were probably more likely to participate. A margin of error is not applicable to an online survey as it is not a random sample.

The online survey sample differed somewhat from Juneau's population in terms of gender, neighborhood, and age. Women were more likely to participate than men (58% versus 42%). Participants were more likely to reside in Downtown/Thane (23%) than the overall population (11%); they were less likely to reside in the Valley (27% versus 45%) and Salmon/Lemon/Switzer Creeks (7% versus 15%). As with the phone survey, those in the youngest age group were less likely to participate, while those in the oldest age group were more likely to participate. Results were not weighted by age (as the phone survey results were) to reflect overall population, as the results are not representative of the overall population.

See table, next page.

Table 3. Online Survey Sample versus Juneau Population

	Survey Sample (%)	Juneau Population (%)
Gender		
Male	42	51
Female	58	49
No answer	1	n/a
Area of Residence		
Mendenhall Valley	27	45
Salmon Creek/Lemon Creek/Switzer Creek	7	15
Douglas/West Juneau	18	12
Downtown/Thane	23	11
Brotherhood Bridge/Out the Road	16	11
North Douglas	9	5
Other	1	-
Age		
18-34	15	26
35-44	18	19
45-54	17	17
55-64	20	19
65+	30	19

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

Report Organization

Survey results are presented first for the phone survey, then for the online survey. Both survey instruments are included in the Appendix.

Phone Survey Results

Overall Impact of Visitor Industry

Respondents were asked to characterize overall visitor industry impacts on their household in 2019 as positive, negative, both positive and negative, or no impact. The most common answer was "positive impact" at 36% followed by "both positive and negative" at 33%. One-fifth of respondents (20%) said there was "no impact at all", and 8% said they experienced an overall "negative impact".

Some statistically significant differences were evident by subgroup.

- Residents of Salmon/Lemon/Switzer Creeks ("Creeks") and North Douglas were more likely to report overall positive impacts, at 48% and 47%, respectively. This compares with 36% of all residents.
- Residents of Downtown/Thane and Out the Road/Brotherhood Bridge were more likely to report overall negative impacts at 16% and 17%, respectively. This compares with 8% of all residents.
- Those who work in the Valley and those who worked in the Creeks area were more likely than those who work in Downtown/Thane to say the industry had no impact at all on their household (30% among Valley workers and 24% among Creeks workers versus 13% among Downtown/Thane workers). (Sample sizes for workers in other neighborhoods were too small for analysis.)
- Respondents in the middle age bracket (35 to 54 years old) were slightly more likely to say the industry had an overall positive impact at 42%. This compares to 32% among both older respondents (55+ years) and younger respondents (18 to 34 years old).
- Respondents in the older age bracket were slightly more likely to say the industry had an overall negative impact (12%, versus 7% of middle-aged respondents and 6% of younger respondents).
- Respondents reporting a household member who worked in tourism were more likely to cite overall positive impacts (46%) compared with other respondents (32%).

Table 4. 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?
PHONE SURVEY

n=506	% of Total
Positive impact	36
Negative impact	8
Both positive and negative impacts	33
No impact at all	20
Don't know	2

Comparing to Past Surveys

A similar question was asked in past surveys. Results were very similar between 2006 (the most recent survey) and 2021: those characterizing the impact as positive represented 40% (compared to 36% in 2021); both positive and negative represented 34% (compared to 33% in 2021); negative was at 8% both surveys; and no impact represented 17% (compared to 20% in 2021).

The previous 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?*

Table 5. TREND: Positive Versus Negative Impacts, 1995, 1998, 2002, 2006, 2021

	1995	1998	2002	2006	2021	Change 2006-2021
Positive impact	34	29	40	40	36	**-4**
Negative impact	8	10	6	8	8	-
Both positive and negative impacts	37	43	37	34	33	**-1**
No impact at all	19	16	15	17	20	**+3**
Don't know	2	1	1	1	2	**+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 (51%) said the positive outweighed the negative; 30% said the reverse; and 14% said neither/neutral.

Sample sizes for subgroups were too small for analysis.

Table 6. Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?
Base: "Both positive and negative impacts"
PHONE SURVEY

n=169	% of Base
Positive impacts outweigh negative	51
Negative impacts outweigh positive	30
Neutral/neither	14
Don't know	4

Comparing to Past Surveys

This question garnered similar responses in 2006, with 47% of those who had said they experienced both positive and negative impacts saying "the benefits outweigh the costs," 32% saying "the costs outweigh the benefits," and 14% saying they were neutral. (The 2006 question was *Do you feel that the costs outweigh the benefits or the benefits outweigh the costs?)*

Table 7. TREND: Weighing Both Positive and Negative Impacts, 1998, 2002, 2006, 2021 (%)

	1998	2002	2006	2021	Change 2006-2021
The benefits outweigh the costs (2021: positive impacts outweigh negative)	45	46	47	51	+4
The costs outweigh the benefits (2021: negative impacts outweigh positive)	32	29	32	30	-2
Neutral	16	16	14	14	-
Don't know	6	8	7	4	-3

Specific Impacts

Respondents were read a list of eight visitor-related impacts and asked how affected their household was in 2019. Respondents were most likely to be affected by crowding on sidewalks downtown (57% were somewhat or very affected), crowding at Mendenhall Glacier (57%), and vehicle congestion downtown (57%).

Statistically significant differences by subgroup included the following. (Differences by neighborhood are detailed on the following page.)

- Younger adults were more likely to be affected by crowding on sidewalks downtown: 66%, versus 55% of middle-aged respondents and 53% of older respondents. Younger respondents were also more likely to be affected by crowding at Mendenhall Glacier: 68%, versus 55% of middle-aged respondents and 52% of older respondents.
- Women were more likely to report affected by crowding on trails (39%, versus 29% of men), crowding at Mendenhall Glacier (65% versus 52%), and air emissions (41% versus 32%).

Table 8. For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2019? (%)
PHONE SURVEY

n=506	Very affected	Somewhat affected	Very + Somewhat Affected	Not affected	Don't know
Crowding on sidewalks downtown	32	25	**57**	**41**	2
Crowding at Mendenhall Glacier	30	27	**57**	**40**	3
Vehicle congestion downtown	23	34	**57**	**42**	1
Whale watching boat traffic	22	19	**41**	**53**	6
Flightseeing noise	16	25	**41**	**57**	1
Air emissions from cruise ships	12	24	**36**	**60**	4
Vehicle congestion outside of downtown	8	28	**36**	**64**	<1
Crowding on trails	8	26	**34**	**63**	3

Differences by Neighborhood

Downtown/Thane, Douglas/West Juneau, and North Douglas residents showed higher rates of being affected in several categories, while Valley, Creeks, and Out the Road residents tended to show lower rates. "Affected" rates were highest among Douglas/West Juneau residents for vehicle congestion downtown (73%) and crowding on sidewalks downtown (71%), as well as for downtown/Thane residents for vehicle congestion downtown (71%).

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

	Downtown/ Thane n=62	Douglas/ West Juneau n=76	Creeks n=50	Mend. Valley n=221	North Douglas n=35	Out the Road n=50
Crowding on sidewalks downtown	66	71	47	53	63	44
Crowding at Mendenhall Glacier	60	57	55	57	63	46
Vehicle congestion downtown	71	73	35	53	67	48
Whale watching boat traffic	41	35	51	36	62	49
Flightseeing noise	58	49	39	33	67	40
Air emissions from cruise ships	53	50	35	25	48	30
Vehicle congestion outside of downtown	33	33	24	38	38	43
Crowding on trails	43	47	32	29	28	34

The table below shows responses by neighborhood of employment. Three of six neighborhoods had sufficient sample sizes for analysis: Downtown/Thane, Creeks, and Mendenhall Valley. There were three areas of statistically significant differences: downtown workers were more likely to be affected by crowding on sidewalks downtown (66%), vehicle congestion downtown (64%), and flightseeing noise (51%).

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

	Downtown/ Thane n=134	Creeks n=45	Mend. Valley n=78
Crowding on sidewalks downtown	66	42	54
Crowding at Mendenhall Glacier	63	51	54
Vehicle congestion downtown	64	47	46
Whale watching boat traffic	36	35	40
Flightseeing noise	51	30	30
Air emissions from cruise ships	41	26	28
Vehicle congestion outside of downtown	36	25	35
Crowding on trails	41	26	31

Comparing to 2006

A similar question was asked in 2006. While the rating scale and the categories were changed, a few comparisons are possible. The 2006 category of "foot traffic congestion" generated 55% of respondents saying they were affected, similar to the 57% of 2021 respondents who said they were affected by "crowding on sidewalks downtown." Those affected by vehicle congestion appears to have increased: from 48% in 2006 to 57% in 2021. In terms of flightseeing noise, the 2006 survey separated helicopter noise (46% affected) from airplane noise (35%) affected; this compares with 41% of 2021 respondents affected by flightseeing noise.

Table 11. TREND: Specific Impacts, 2016 and 2021 (%)

2006	2006 Very Affected + Affected + Somewhat Affected	2021	2021 Very + Somewhat Affected
Foot traffic congestion	55	Crowding on sidewalks downtown	57
Vehicle congestion	48	Vehicle congestion downtown	57
Helicopter noise	46	Flightseeing noise	41
Airplane noise	35		

CBJ Tourism Management

Nearly one-half of residents (45%) thought CBJ was "not doing enough" to manage the impacts of the visitor industry, while 39% said they were doing "just the right amount," and 7% said they were doing "more than enough."

There were only two statistically significant differences among subgroups.

- Downtown/Thane residents were more likely to say CBJ was not doing enough at 60%; this compares with 55% of North Douglas residents, 49% of Douglas/West Juneau residents, 40% of Valley and Out the Road residents, and 37% of Creeks residents.
- Creeks and Valley residents were more likely to say CBJ was doing more than enough at 12% and 9%, respectively; this compares with between 2% and 5% of other 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? PHONE SURVEY

n=504	% of Total
More than enough	7
Not enough	45
Just the right amount	39
Don't know	9

Comparing to Past Surveys

Responses to this same question were very similar between 2006 and 2021: in 2006, 47% of respondents said CBJ was not doing enough (compared to 45% in 2021); 36% said they were doing just the right amount (compared to 39% in 2021), and 9% said they were doing more than enough (compared to 7% in 2021).

Table 13. TREND: CBJ Management of Impacts, 2002, 2006, 2021 (%)

	2002	2006	2021	Change 2006-2021
More than enough	6	9	7	-2
Not enough	52	47	45	-2
Just the right amount	34	36	39	+3
Don't know	7	8	9	+1

TBMP Awareness

One out of seven respondents (14%) said they were very familiar with the Tourism Best Management Practices (TBMP) program, while another 32% said they were somewhat familiar. Over half (54%) were not familiar.

Statistically significant differences included the following.

- North Douglas residents were more likely to be very familiar with the program (29%, versus 14% of all respondents).
- Those with household members employed in the industry were more likely to be very familiar with the program: 25%, versus 9% of other respondents.
- Younger respondents were more likely to be *unfamiliar* with the program at 69%; this compares with 57% of middle-aged respondents and 40% of older respondents.

Table 14. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. Are you very familiar, somewhat familiar, or not familiar with this program?
PHONE SURVEY

n=501	% of Total
Very familiar	14
Somewhat familiar	32
Not familiar	54

Comparing to 2006

In the 2006 survey, respondents were asked a simple "yes/no" question on their awareness of TBMP; 43% were aware, while 57% were not aware, closely resembling 2021 results (46% somewhat or very familiar versus 54% not familiar).

TBMP Effectiveness

Respondents who were somewhat or very aware of TBMP were asked to rate the program's effectiveness in three categories. Most respondents felt each of the activities were at least somewhat effective: developing operating guidelines (74% somewhat or very effective), encouraging compliance (69%), and providing opportunities for residents to give feedback (59%).

Table 15. Do you think this program has been very effective, somewhat effective, or not effective at the following objectives? (%)
Base: Somewhat or very familiar with TBMP
PHONE SURVEY

n=231	Very effective	Somewhat effective	Not effective	Don't know/ Not aware
Developing operating guidelines for tourism businesses	23	51	10	17
Encouraging compliance with recommended operating guidelines	22	47	14	17
Providing opportunities for residents to give feedback to tourism businesses	24	35	26	16

Cruise Ship Limitations

Before the next series of questions, respondents were read the following statement:

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.

Nearly two-thirds of respondents (63%) were supportive of CBJ working to limit the number of large ships per day in Juneau's harbor, while 28% were opposed.

Statistically significant differences included the following.

- Downtown/Thane residents were more likely to be *very* supportive (47%, versus 31% of all respondents).
- Respondents who work in Downtown/Thane and the Creeks were more supportive (67%) than Valley workers (45%).
- Older respondents were slightly more supportive at 69%; this compares with 58% of middle-aged respondents and 62% of younger respondents.
- Women were more supportive than men (69% versus 58%).

- Those with household members employed in the visitor industry were slightly less supportive (56%) than other respondents (66%).

Table 16. 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? PHONE SURVEY

n=500	% of Total
Total Supportive	**63**
Very supportive	31
Supportive	32
Total Opposed	**28**
Opposed	18
Very opposed	10
Don't know	9

Maximum Number of Ships

When asked to suggest a maximum number of ships that should be allowed per day in Juneau's harbor, the average response was 4.2. The most popular response was five (29%) followed by three (19%) and four (15%).

Statistically significant differences in the average number of ships included the following.

- Results by neighborhood were fairly consistent, although Valley residents reported a slightly higher average number (4.5 ships) while Douglas/West Juneau residents reported a slightly lower average number (3.8 ships).
- Middle-aged respondents reported a higher average number of ships at 4.5; this compares with 4.2 among older respondents and 3.7 among younger respondents.
- Men reported an average of 4.4 ships; this compares with 3.9 ships among women.

Table 17. If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?
PHONE SURVEY

n=500	% of Total
0	1
1	3
2	7
3	19
4	15
5	29
6+	9
Average	**4.2 ships**
Don't know	17

Comparing to 2006

In the 2006 survey, a similar question asked: *What is the optimal number of large cruise ships to visit Juneau, during the summer, on any given day?* The average number suggested was 4.2 ships – matching the 2021 average of respondents' suggested "maximum number."

Table 18. TREND: Optimal/Maximum Number of Cruise Ships Per Day, 2006 and 2021 (%)

	2006 "Optimal"	2021 "Maximum"	Change 2006-2021
0	<1	1	+1
1	2	3	+1
2	8	7	-1
3	22	19	-3
4	21	15	-6
5	23	29	+6
6+	13	9	-4
Average	**4.2 ships**	**4.2 ships**	**No change**
Don't know	9	17	+8

Hot-Berthing

When asked whether they supported or opposed prohibiting "hot-berthing" at Juneau docks, respondents were about evenly split, with 44% in opposition and 39% in support. A significant percentage (17%) didn't know.

There were no statistically significant differences among subgroups.

Table 19. "Hot-berthing" is a term used when one ship leaves and another takes its place at the same dock, on the same day. Would you be very supportive, supportive, opposed, very opposed to prohibiting hot-berthing at Juneau docks?
PHONE SURVEY

n=491	% of Total
Total Supportive	**39**
Very supportive	10
Supportive	29
Total Opposed	**44**
Opposed	35
Very opposed	9
Don't know	17

New Dock Construction

Before the next series of questions, respondents were read the following statement:

Norwegian Cruise Lines purchased land at the Subport, between the Coast Guard base and Gold Creek, to develop a dock for large cruise ships. The dock is currently designed for one side to be used by large cruise ships and the other side by the US Coast Guard and Fish and Wildlife Service.

Over one-half of respondents (56%) were supportive of NCL constructing a new dock, while 33% were opposed. About equal numbers felt strongly: 17% were *very* supportive, while 14% were *very* opposed.

Statistically significant differences among subgroups included the following.

- Those who work in the Valley were the most likely to be supportive at 67%, followed by Creeks workers (63%), then Downtown/Thane workers (53%). (See below for differences by neighborhood of residence.)
- Men were more likely to be supportive (61%) than women (50%).

Table 20. Are you very supportive, supportive, opposed, or very opposed to Norwegian Cruise Line constructing a new cruise ship dock at the subport? PHONE SURVEY

n=500	% of Total
Total Supportive	**56**
Very supportive	17
Supportive	39
Total Opposed	**33**
Opposed	19
Very opposed	14
Don't know	10

Results by Neighborhood of Residence

Valley and Creeks residents were the most likely to be supportive at 64% and 62%, respectively; North Douglas and Downtown/Thane residents were the least likely at 43% and 45%.

Table 21. DOCK SUPPORT BY NEIGHBORHOOD: Total Support vs. Total Oppose (%)
PHONE SURVEY

	Downtown/ Thane n=62	Douglas/ West Juneau n=76	Creeks n=50	Mend. Valley n=221	North Douglas n=35	Out the Road n=51
Support	45	53	62	64	43	52
Oppose	43	36	25	29	49	34

Factors that May Increase Support

Those that said they were opposed or very opposed to the new dock were asked whether a series of factors would increase their level of support. The factors most likely to increase support were a cap of five large ships a day (42% said their support would increase), followed by a public park (40%), interpretive ocean center (38%), and a Seawalk connection (34%). Retail and restaurants were the least likely to increase support, although 21% still said their support would increase with this element.

Small sample sizes for this question preclude analysis for most subgroups. One exception was age groups. Older respondents were the least likely to be swayed; their "no" responses were higher for nearly every category than those in the middle and younger age brackets.

Table 22. Would your level of support increase if the dock project incorporated any of the following elements? (%)
Base: Opposed to new dock construction
PHONE SURVEY

n=165	Yes	No	Don't know
A cap of five large ships per day in Juneau's harbor	42	54	3
Public park	40	55	5
Interpretive ocean center	38	53	9
Seawalk connection	34	60	6
Shore power	33	59	8
Housing	27	63	10
Underground parking	26	68	6
Retail and restaurants	21	76	2

Tourism Markets

Respondents were asked the level of priority Juneau should place on growing each of four visitor markets. The market most likely to receive "high priority" ratings was ferry travelers (71%) followed by air travelers (48%), small cruise ships (39%), and large cruise ships (18%).

Statistically significant differences included the following.

- Douglas/West Juneau and North Douglas residents were more likely to suggest ferry travelers should be high priority (80% and 78%, respectively); this compares with 71% of all respondents.
- Downtown/Thane and Out the Road residents were more likely to suggest large ships should be low priority (65% and 64%, respectively); this compares with 51% of all respondents.
- Women were more likely to suggest large ships should be low priority: 59%, versus 44% of men. Men were more likely to suggest air travelers should be high priority: 54%, versus 41% of women.

Table 23. Do you feel that Juneau should place a high priority, moderate priority, or low priority in growing each of the following visitor markets? (%)
PHONE SURVEY

n=495	High Priority	Moderate Priority	Low Priority	Don't know
Ferry travelers	71	19	8	3
Air travelers	48	34	14	4
Small cruise ships	39	43	15	3
Large cruise ships	18	29	51	2

Tourism Employment

One-third of respondents (32%) said a member of their household had been employed in the Juneau tourism industry sometime in the past five years. Among these respondents, the average number employed was 1.5 people.

Statistically significant differences included the following.

- North Douglas residents reported the highest rate of tourism industry employment at 49%, while Out the Road residents reported the lowest rate at 26%.
- Younger respondents were more likely to have a household member employed in the industry at 43%; this compares with 30% of older respondents and 25% of middle-aged respondents.

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?
PHONE SURVEY

n=496	% of Total
Yes	32
No	68

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

n=156	% of Base
1	62
2	30
3	4
4+	4
Average	**1.5**

Comparing to Past Surveys

In the 2006 survey, a similar question asked whether any household members had been employed in the tourism industry, but the length of time was two years rather than five years. (The question was changed to include pre-pandemic years.) In that survey 23% answered affirmatively; this compares with 32% in 2021. The increase may be due in part to the increase in the length of time from two to five years, as well as by the increase in local tourism employment.

The average number of household members employed in tourism was similar both years (1.4 people in 2006; 1.5 people in 2021).

Table 26. TREND: Household Member Employed in Juneau Tourism 2002, 2006, 2021 (%)

	2002 Past 2 years	2006 Past 2 years	2021 Past 5 years	Change 2006-2021
Household member employed	21	23	32	+9
Average number	1.4 people	1.4 people	1.5 people	+0.1

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; please refer to methodology section for more detail on weighting.)

Respondents were most likely to live in the Mendenhall Valley (44%) followed by Douglas/West Juneau (15%), downtown/Thane (12%), Salmon Creek/Lemon Creek/Switzer Creek (10%), Brotherhood Bridge/Out the Road (10%), and North Douglas (7%).

Respondents were most likely to work in downtown/Thane (27%) followed by the Valley (16%). Over one-quarter of respondents (28%) didn't work.

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
PHONE SURVEY

n=498	LIVE % of Total	WORK % of Total
Mendenhall Valley	44	16
Douglas/West Juneau	15	3
Downtown/Thane	12	27
Salmon Creek/Lemon Creek/Switzer Creek	10	9
Brotherhood Bridge/Out the Road	10	6
North Douglas	7	1
Borough-wide	n/a	9
Unemployed/retired/etc.	n/a	28
Refused	1	<1

Respondents were most likely to fall into the 65+ age group (32%). They reported an average age of 54.

Table 28. Age
UNWEIGHTED
PHONE SURVEY

n=506	% of Total
18-24	4
25-34	11
35-44	17
45-54	19
55-64	18
65+	32
Average age	**54 years old**

Respondents were slightly more likely to be male (52%) than female (45%). Note that gender was not asked directly of respondents; surveyors made assumptions based on voice, resulting in 3% "don't know" responses.

Table 29. Gender
UNWEIGHTED
PHONE SURVEY

n=506	% of Total
Male	52
Female	45
Don't know	3

Online Survey Results

This section presents results to the online survey in summary format. The online survey was open to the public for three weeks after the telephone survey concluded. A total of 1,924 residents participated in the survey. Compared to the telephone survey sample, online respondents were more likely to live in Downtown/Thane; less likely to live in Mendenhall Valley or Salmon/ Lemon/Switzer Creek; and more likely to be female. Please see the Methodology section for additional details on the statistical validity and representativeness of the online sample relative to the phone sample.

Summary of Results

In general, online respondents tended to report higher impacts from the tourism industry than phone survey respondents.

- Those saying they experienced overall negative impacts from the tourism industry in 2019 was 23% in the online survey; this compares to 8% in the phone survey.
- A higher number of online survey respondents reported being affected by various visitor-related impacts. Examples include:
    - 79% of online respondents were affected by vehicle congestion downtown, compared with 57% of phone respondents.
    - 78% of online respondents were affected by crowding on sidewalks downtown, compared with 57% of phone respondents.
    - 75% of online respondents were affected by crowding at Mendenhall Glacier, compared with 57% of phone respondents.

Online respondents tended to be more familiar with TBMP and more critical of both TBMP and CBJ tourism management in comparison with phone survey respondents.

- 76% of online respondents were very or somewhat familiar with TBMP, compared with 46% of phone respondents.
- "Not effective" ratings for the various TBMP programs were higher among online respondents (between 24% and 39%) than among phone respondents (between 10% and 26%).
- 68% of online respondents believed CBJ was not doing enough to manage tourism impacts, compared with 45% of phone respondents.

Online respondents supported more limitations on cruise ships.

- 54% of online respondents were very supportive of CBJ working to limit the number of large cruise ships per day; this compares with 31% of phone respondents.
- On average, online respondents thought the maximum number of cruise ships per day should be 3.7 ships; this compares with 4.2 among phone respondents.
- 27% of online respondents were very supportive of prohibiting hot-berthing, compared with 10% of phone respondents.
- 42% of online respondents supported NCL constructing a new dock, compared with 56% of phone respondents.

Detailed Results

Table 30. 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?
ONLINE SURVEY

n=1,924	% of Total
Positive impact	26
Negative impact	23
Both positive and negative impacts	48
No impact at all	3

Table 31. Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?
Base: "Both positive and negative impacts"
ONLINE SURVEY

n=909	% of Base
Positive impacts outweigh negative	28
Negative impacts outweigh positive	47
Neutral/neither	19
Don't know	5

Table 32. For each of the following visitor-related impacts, how was your household affected in 2019? (%)
ONLINE SURVEY

n=1,902	Very affected	Somewhat affected	Very + Somewhat affected	Not affected	Don't know
Crowding on sidewalks downtown	46	32	**78**	**21**	1
Crowding at Mendenhall Glacier	49	26	**75**	**22**	3
Vehicle congestion downtown	36	43	**79**	**21**	1
Whale watching boat traffic	39	23	**62**	**32**	6
Flightseeing noise	40	28	**68**	**31**	1
Air emissions from cruise ships	32	29	**61**	**32**	7
Vehicle congestion outside of downtown	18	43	**61**	**39**	1
Crowding on trails	21	39	**60**	**37**	3

Table 33. IMPACTS BY NEIGHBORHOOD OF RESIDENCE: "Very affected" plus "Somewhat affected" (%)
ONLINE SURVEY

	Downtown/ Thane n=430	Douglas/ West Juneau n=330	Creeks n=136	Mend. Valley n=508	North Douglas n=166	Out the Road n=298
Crowding on sidewalks downtown	90	77	75	69	84	76
Crowding at Mendenhall Glacier	77	68	73	75	80	82
Vehicle congestion downtown	91	76	72	72	91	77
Whale watching boat traffic	63	54	58	57	71	78
Flightseeing noise	77	64	61	59	79	76
Air emissions from cruise ships	78	66	56	44	69	58
Vehicle congestion outside of downtown	61	57	55	57	69	68
Crowding on trails	70	54	56	51	68	67

Table 34. IMPACTS BY NEIGHBORHOOD OF EMPLOYMENT: "Very affected" plus "Somewhat affected" (%) ONLINE SURVEY

	Downtown/ Thane n=685	Douglas/West Juneau n=66	Creeks n=136	Mend. Valley n=204	North Douglas n=22	Out the Road n=77
Crowding on sidewalks downtown	80	80	78	69	82	67
Crowding at Mendenhall Glacier	71	70	73	77	77	74
Vehicle congestion downtown	81	83	76	69	81	68
Whale watching boat traffic	57	59	65	58	87	71
Flightseeing noise	65	68	66	54	91	69
Air emissions from cruise ships	62	65	60	44	63	58
Vehicle congestion outside of downtown	56	63	62	50	64	67
Crowding on trails	58	59	59	49	63	67

Table 35. 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? ONLINE SURVEY

n=1,893	% of Total
More than enough	9
Not enough	68
Just the right amount	17
Don't know	7

Table 36. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. How familiar are you with this program? ONLINE SURVEY

n=1,874	% of Total
Very familiar	30
Somewhat familiar	46
Not familiar	24

Table 37. How effective do you think the TBMP program has been at the following objectives? (%) Base: Somewhat or very familiar with TBMP ONLINE SURVEY

n=1,423	Very effective	Somewhat effective	Not effective	Don't know/ Not aware
Developing operating guidelines for tourism businesses	24	44	24	9
Encouraging compliance with recommended operating guidelines	21	36	30	13
Providing opportunities for residents to give feedback to tourism businesses	22	28	39	11

Before the next series of questions, respondents read the following statement:

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.

Table 38. What is your level of support or opposition to CBJ working to limit the number of large cruise ships per day in Juneau's harbor?
ONLINE SURVEY

n=1,881	% of Total
Total Supportive	**73**
Very supportive	54
Supportive	19
Total Opposed	**14**
Opposed	10
Very opposed	14
Don't know	4

Table 39. If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?
ONLINE SURVEY

n=1,881	% of Total
0	1
1	7
2	19
3	21
4	15
5	11
6+	9
Average	**3.7**
Don't know	18

Table 40. "Hot-berthing" is a term used when one ship leaves and another takes its place at the same dock, on the same day. How supportive or opposed would you be to prohibiting hot-berthing at Juneau docks?
ONLINE SURVEY

n=1,873	% of Total
Total Supportive	**45**
Very supportive	27
Supportive	18
Total Opposed	**35**
Opposed	18
Very opposed	17
Don't know	20

Before the next series of questions, respondents were read the following statement:

Norwegian Cruise Lines purchased land at the Subport, between the Coast Guard base and Gold Creek, to develop a dock for large cruise ships. The dock is currently designed for one side to be used by large cruise ships and the other side by the US Coast Guard and Fish and Wildlife Service.

Table 41. What is your level of support or opposition to Norwegian Cruise Line constructing a new cruise ship dock at the subport?
ONLINE SURVEY

n=1,877	% of Total
Total Supportive	**42**
Very supportive	20
Supportive	22
Total Opposed	**47**
Opposed	21
Very opposed	26
Don't know	11

Table 42. DOCK SUPPORT BY NEIGHBORHOOD: Total Support vs. Total Oppose
ONLINE SURVEY

	Downtown/ Thane n=430	Douglas/ West Juneau n=330	Creeks n=136	Mend. Valley n=508	North Douglas n=166	Out the Road n=298
Support	28	46	50	53	32	42
Oppose	60	44	40	37	59	45

Table 43. Would your level of support increase if the dock project incorporated any of the following elements? (%)
Base: Opposed to new dock construction
ONLINE SURVEY

n=881	Yes	No	Don't know
A cap of five large ships per day in Juneau's harbor	31	60	9
Public park	44	51	6
Interpretive ocean center	37	56	8
Seawalk connection	45	50	5
Shore power	34	54	12
Housing	26	64	11
Underground parking	29	61	10
Retail and restaurants	13	78	8

Table 44. What priority do you feel that Juneau should place in growing each of the following visitor markets? (%)
ONLINE SURVEY

n=1,870	High Priority	Moderate Priority	Low Priority	Don't know
Ferry travelers	69	20	9	1
Air travelers	47	40	12	1
Small cruise ships	41	42	15	1
Large cruise ships	12	17	71	1

Table 45. Have you or any members of your household been employed in the Juneau tourism industry at any time during the past five years?
ONLINE SURVEY

n=1,868	% of Total
Yes	35
No	65

Table 46. How many people?
Base: Household members employed in industry
ONLINE SURVEY

n=655	% of Base
1	61
2	26
3	7
4+	6
Average	**1.7**

Table 47. In which area of the City and Borough do you live? In which area of the City and Borough do you work? ONLINE SURVEY

n=1,870	LIVE % of Total	WORK % of Total
Mendenhall Valley	27	11
Downtown/Thane	23	37
Douglas/West Juneau	18	4
Brotherhood Bridge/Out the Road	16	5
North Douglas	9	1
Salmon Creek/Lemon Creek/Switzer Creek	7	8
Borough-wide	n/a	7
Unemployed/retired/etc.	n/a	27
Work out of the area	n/a	1
Don't know	<1	<1

Table 48. Age ONLINE SURVEY

n=1,924	% of Total
18-24	2
25-34	13
35-44	18
45-54	17
55-64	20
65+	30
Average Age	**53 years old**

Table 49. Gender ONLINE SURVEY

n=1,732	% of Total
Male	42
Female	58
Don't know	1

Appendix

See attached telephone and online survey instruments.

Juneau Community Visitor Industry Survey 2021

Phone #_____ **Survey #**_____

Interviewer Name_____ **Date**_____

Hello, this is _____ with McKinley Research Group, formerly McDowell Group. We are conducting a study for the City and Borough of Juneau and would like to ask your opinions about the visitor industry.

1. **First, in what year were you born? _____** [if 2003 or later, ask for an adult, if none, thank and end survey]

2. **Did you live in Juneau in the summer of 2019?** 01❒ Yes [if no, thank and end survey]

3. **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?**

   01❒ Positive impact (skip to Q5)
   02❒ Negative impact (skip to Q5)
   03❒ Both (ask 4)
   04❒ No impact at all (skip to Q5)
   05❒ Don't know (skip to Q5)
   06❒ Refused (skip to Q5)

4. **Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?**

   01❒ Positive impacts outweigh negative
   02❒ Negative impacts outweigh positive
   03❒ Neutral/neither
   04❒ Don't know
   05❒ Refused

5. **For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2019?**

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	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
   03❒ Just the right amount
   04❒ Don't know
   05❒ Refused

7. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. Are you very familiar, somewhat familiar, or not familiar with this program?

01❒ Very familiar
02❒ Somewhat familiar
03❒ Not familiar (skip to Q8)
04❒ DK/Refused (skip to Q8)

8. Do you think this program has been very effective, somewhat effective, or not effective at the following objectives?

Do not rotate	Very effective	Somewhat effective	Not effective	Don't know/ Not aware	Refused
a. Developing operating guidelines for tourism businesses	1❒	2❒	3❒	4❒	5❒
b. Encouraging compliance with recommended operating guidelines	1❒	2❒	3❒	4❒	5❒
c. Providing opportunities for residents to give feedback to tourism businesses	1❒	2❒	3❒	4❒	5❒

[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.

9. 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?

01❒ Very supportive
02❒ Supportive
03❒ Opposed
04❒ Very opposed
05❒ Don't know
06❒ Refused

10. If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?

#_____ 01❒ Don't know 02❒ Refused

[READ] Norwegian Cruise Lines purchased land at the Subport, between the Coast Guard base and Gold Creek, to develop a dock for large cruise ships. The dock is currently designed for one side to be used by large cruise ships and the other side by the US Coast Guard and Fish and Wildlife Service.

11. Are you very supportive, supportive, opposed, or very opposed to Norwegian Cruise Line constructing a new cruise ship dock at the subport?

01❒ Very supportive (skip to Q13)
02❒ Supportive (skip to Q13)
03❒ Opposed
04❒ Very opposed
05❒ Don't know
06❒ Refused

12. Would your level of support increase if the dock project incorporated any of the following elements?

ROTATE	Yes	No	Don't know	Refused
a. Retail and restaurants	1❒	2❒	3❒	4❒
b. Interpretive ocean center	1❒	2❒	3❒	4❒
c. Seawalk connection	1❒	2❒	3❒	4❒

d. Shore power	1❒	2❒	3❒	4❒
e. Housing	1❒	2❒	3❒	4❒
f. Underground parking	1❒	2❒	3❒	4❒
g. Public park	1❒	2❒	3❒	4❒
h. A cap of five large ships per day in Juneau's harbor	1❒	2❒	3❒	4❒

13. "Hot-berthing" is a term used when one ship leaves and another takes its place at the same dock, on the same day. Would you be very supportive, supportive, opposed, very opposed to prohibiting hot-berthing at Juneau docks?

01❒ Very supportive
02❒ Supportive
03❒ Opposed
04❒ Very opposed
05❒ Don't know
06❒ Refused

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

ROTATE	**High priority**	**Moderate priority**	**Low priority**	**Don't Know**	**Refused**
a. Large cruise ships	1❒	2❒	3❒	4❒	5❒
b. Small cruise ships	1❒	2❒	3❒	4❒	5❒
c. Air travelers	1❒	2❒	3❒	4❒	5❒
d. Ferry travelers	1❒	2❒	3❒	4❒	5❒

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

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

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

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

17. 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 ➡ **17a. How many people? #_____**
02❒ No

Thank you for participating in this important project!

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

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Juneau Community Visitor Industry Survey 2021 – ONLINE

Welcome! Please click below to begin the survey.

Note: If you participated in the recent phone survey on this topic: thank you for your help! Your responses have already been recorded.

1. **What year were you born? _____** [if 2003 or later: Thank you for your time! We are only surveying those 18 and older.]

2. **Did you live in Juneau in the summer of 2019?**

   01❒ Yes 02❒ No [Thank you for your time! We are only surveying those that lived in Juneau in the summer of 2019.]

2a. Do you currently live in Juneau? 01❒ Yes 02❒ No [Thank you for your time! We are only surveying current Juneau residents.]

3. **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?**

   01❒ Positive impact (skip to Q5)
   02❒ Negative impact (skip to Q5)
   03❒ Both (ask 4)
   04❒ No impact at all (skip to Q5)
   05❒ Don't know (skip to Q5)

4. **Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?**

   01❒ Positive impacts outweigh negative
   02❒ Negative impacts outweigh positive
   03❒ Neutral/neither
   04❒ Don't know

5. **For each of the following visitor-related impacts, how was your household affected in 2019?**

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

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
   03❒ Just the right amount
   04❒ Don't know

7. The Tourism Best Management Practices program, also known as TBMP, is intended to reduce impacts in the community. How familiar are you with this program?

01❒ Very familiar
02❒ Somewhat familiar
03❒ Not familiar (skip to Q9)
04❒ Don't know (skip to Q9)

8. How effective do you think the TBMP program has been at the following objectives?

Do not rotate	Very effective	Somewhat effective	Not effective	Don't know/ Not aware
a. Developing operating guidelines for tourism businesses	1❒	2❒	3❒	4❒
b. Encouraging compliance with recommended operating guidelines	1❒	2❒	3❒	4❒
c. Providing opportunities for residents to give feedback to tourism businesses	1❒	2❒	3❒	4❒

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.

9. What is your level of support or opposition to CBJ working to limit the number of large cruise ships per day in Juneau's harbor?

01❒ Very supportive
02❒ Supportive
03❒ Opposed
04❒ Very opposed
05❒ Don't know

10. If it is possible to limit the number of large cruise ships per day in Juneau's harbor, what do you think that maximum number should be?

#_____ 01❒ Don't know

Norwegian Cruise Lines purchased land at the Subport, across from Centennial Hall, to develop a dock for large cruise ships. The dock is currently designed for one side to be used by large cruise ships and the other side by the US Coast Guard and Fish and Wildlife Service.

11. What is your level of support or opposition to Norwegian Cruise Line constructing a new cruise ship dock at the subport?

01❒ Very supportive (skip to Q13)
02❒ Supportive (skip to Q13)
03❒ Opposed
04❒ Very opposed
05❒ Don't know

12. Would your level of support increase if the Norwegian Cruise Line dock project incorporated any of the following elements?

ROTATE	Yes	No	Don't know
a. Retail and restaurants	1❒	2❒	3❒
b. Interpretive ocean center	1❒	2❒	3❒
c. Seawalk connection	1❒	2❒	3❒

d. Shore power	1❒	2❒	3❒
e. Housing	1❒	2❒	3❒
f. Underground parking	1❒	2❒	3❒
g. Public park	1❒	2❒	3❒
h. A cap of five large ships per day in Juneau's harbor	1❒	2❒	3❒

13. "Hot-berthing" is a term used when one ship leaves and another takes its place at the same dock, on the same day. How supportive or opposed would you be to prohibiting hot-berthing at Juneau docks?

01❒ Very supportive
02❒ Supportive
03❒ Opposed
04❒ Very opposed
05❒ Don't know

14. What priority do you feel that Juneau should place in growing each of the following visitor markets?

ROTATE	**High priority**	**Moderate priority**	**Low priority**	**Don't Know**
a. Large cruise ships	1❒	2❒	3❒	4❒
b. Small cruise ships	1❒	2❒	3❒	4❒
c. Air travelers	1❒	2❒	3❒	4❒
d. Ferry travelers	1❒	2❒	3❒	4❒

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

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

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

01❒ Downtown/Thane
02❒ Douglas/West Juneau
03❒ Salmon Creek/Lemon Creek/Switzer Creek
04❒ Mendenhall Valley
05❒ North Douglas
06❒ Brotherhood Bridge/out the road
07❒ Other _____
08❒ Borough-wide
09❒ Unemployed/retired/etc.
10❒ Don't know

17. 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 ➡ **17a. How many people? #_____**
02❒ No
03❒ Don't know

18. What is your gender? 01❒ Male 02❒ Female 03❒Other 04❒ Prefer not to answer

Thank you for participating in this important project!

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