

JUNEAU TOURISM COMMUNITY OPINION SURVEY 2006

***PREPARED FOR:
City and Borough of Juneau***



Research-Based Consulting

Juneau
Anchorage
Kodiak

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EXECUTIVE SUMMARY

In October of 2006, the City and Borough of Juneau contracted with the McDowell Group to conduct the *Juneau Tourism Community Opinion Survey*, the fourth in a series of household surveys regarding tourism and associated impacts. In 2006, the telephone survey included 508 households. Statistical integrity was achieved through controlled sample selection, weighting, and the use of random-digit-dial methodology (which ensures that listed and unlisted households were included).

The purpose of the survey is to have an understanding of residents' current opinions about tourism impacts, and to detect changes in residents' opinions over time. Information provided in this survey is crucial to making prudent management and policy decisions that affect Juneau. It is important to note that since the inception of this survey series in 1995, total Juneau summer visitor arrivals have doubled from half a million summer visitor arrivals (including cruise, air, and ferry passengers) to slightly more than 1,000,000 summer visitors in 2006.

Survey content was similar to surveys conducted by the McDowell Group in 1995, 1998 and 2002. New questions have been added, and some questions modified, as changes in the industry and community warranted. However, the core survey has remained largely intact since 1995.

Juneau residents were asked about the impacts of tourism on their household and their views about various tourism management issues. Additionally, residents were asked about their age, employment, and the areas they lived and worked, allowing more detailed analysis of the survey data.

Key survey findings are presented below.

Consistent with prior year results, nearly half of all residents felt the tourism industry paid its fair share—or more—for services used by visitors.

- More than four out of ten residents (42 percent) felt the tourism industry pays “its fair share” and 6 percent felt that the tourism industry pays “more than it’s fair share.”
- The percentage of residents that believe the tourism industry pays “less than its fair share” has increased from 28 percent in 1995 to 37 percent in 2006.
- Fifteen percent of residents expressed no opinion on tourism industry support for services, down from 27 percent in 1995.

Tourism Industry Support for Service

	2006	2002	1998	1995
More than its fair share	6%	6%	7%	6%
Its fair share	42	42	41	39
Less than its fair share	37	36	33	28
Don't know	15	14	19	27

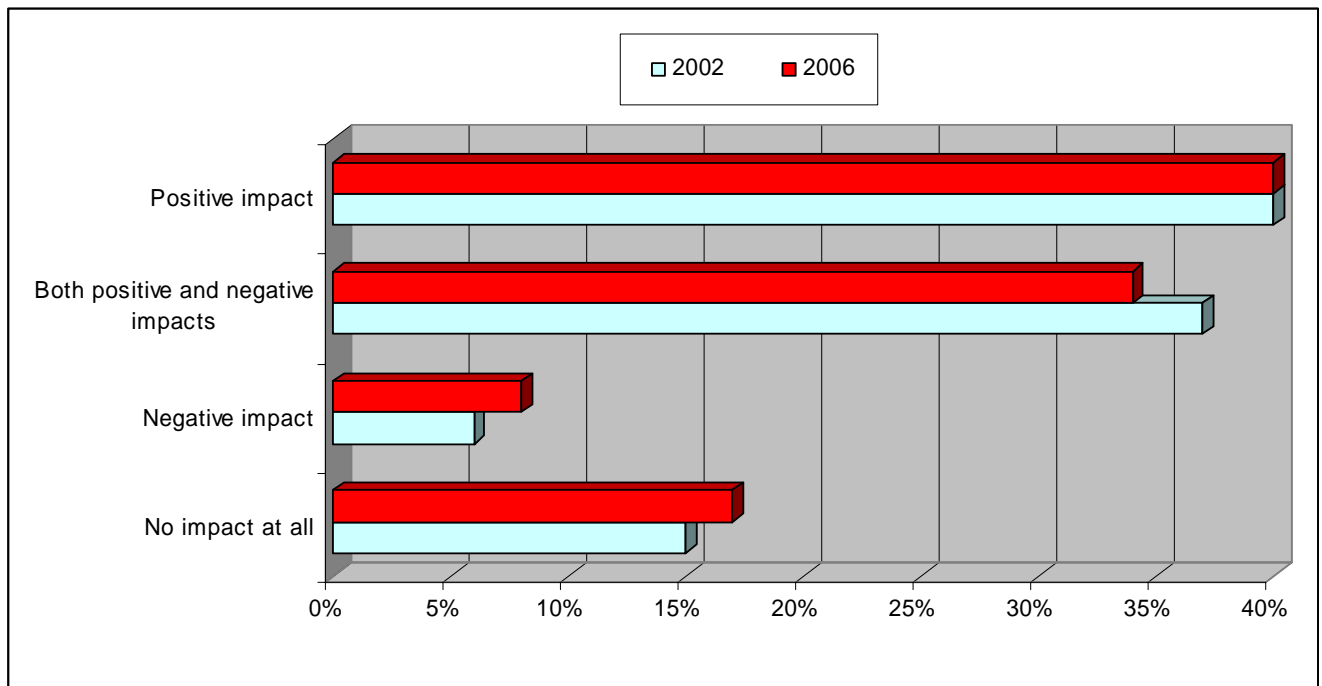
The percentage of Juneau residents who felt that the tourism industry had an overall positive impact on their household remained stable at 40 percent.

- The percentage of residents who felt that tourism had a negative impact on their household increased slightly from 6 percent in 2002 to 8 percent in 2006.
- There has been a decline since 1998 in the number of residents who said there are both positive and negative impacts on their household.

Overall Tourism Impacts on Juneau Households

	2006	2002	1998	1995
Positive impact	40%	40%	29%	34%
Both positive and negative impacts	34	37	43	37
Negative impact	8	6	10	8
No impact at all	17	15	16	19
Not sure	1	1	1	2

Overall Impact Trends



Foot traffic congestion and vehicle congestion were the leading tourism-related impacts, followed by helicopter noise.

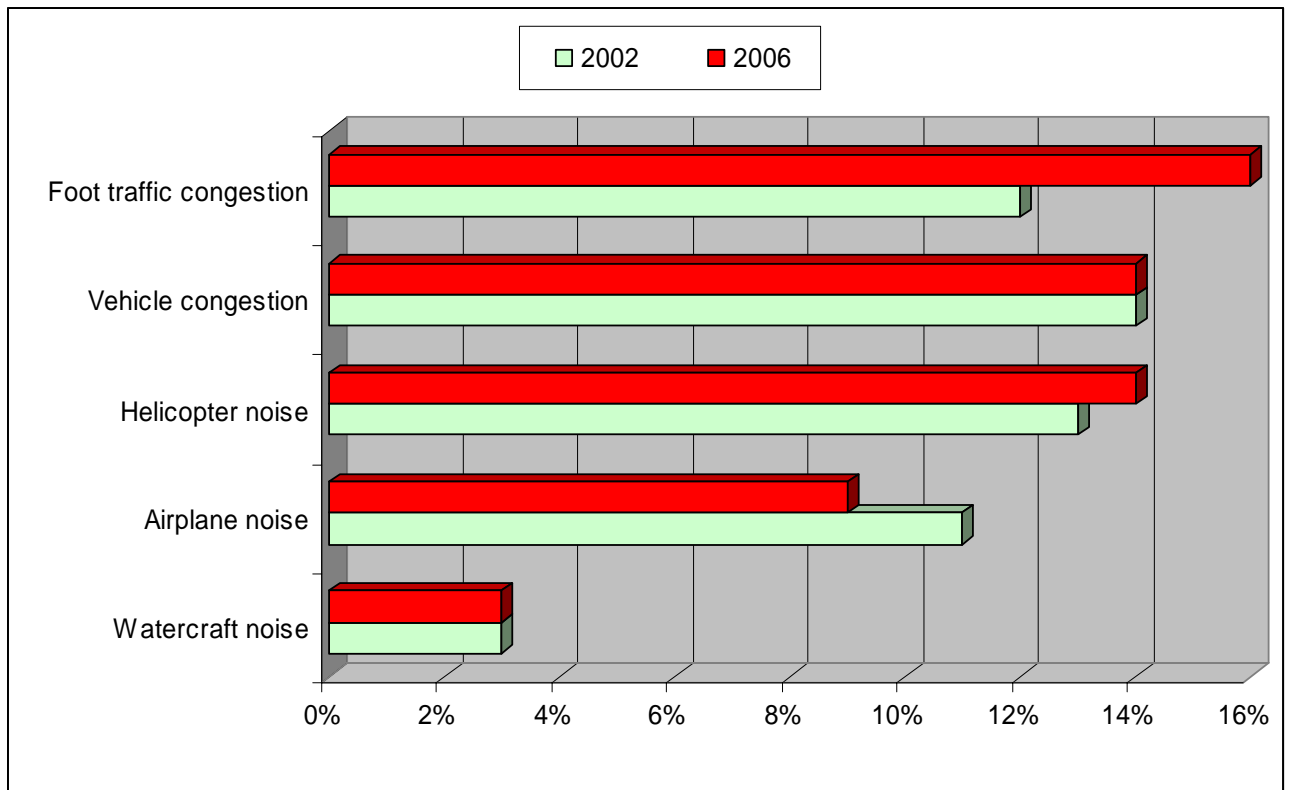
- One-third of Juneau residents reported they were “affected” or “very affected” by foot traffic congestion while 31 percent said they were “affected” or “very affected” by vehicle congestion.
- Traffic congestion has increased since 2002, when 26 percent of respondents were affected by vehicle congestion and 23 percent were affected by foot traffic.
- The percentage of residents “very affected” by helicopter noise increased slightly, while the percentage of residents “very affected” by airplane noise decreased slightly since 2002.

2006 Individual Impacts on Juneau Households

	Very Affected	Affected	Somewhat Affected	Not at all Affected
Foot traffic congestion	16%	17%	23%	44%
Vehicle congestion	14	17	30	38
Helicopter noise	14	9	23	53
Airplane noise	9	8	18	65
Watercraft noise	3	4	14	78

Individual Impact Trend

Percentage responding “very affected”



Nearly half of Juneau residents believe that the City and Borough is not doing enough to manage the impacts of tourism.

- The percentage of residents who felt that the CBJ is not doing enough fell from 52 percent in 2002 to 47 percent in 2006.
- Thirty-six percent of residents felt that the City and Borough was doing “just the right amount” to manage the impacts of tourism.
- The percentage of Juneau residents who felt that the CBJ was doing “more than enough” increased slightly since 2002.

CBJ Management of Tourism Impacts

	2006	2002
Not enough	47%	52%
Just the right amount	36	34
More than enough	9	6
Don't know	8	7

INTRODUCTION AND METHODOLOGY

Introduction

The *Juneau Tourism Community Opinion Survey* series is designed to identify residents' opinions about tourism-related impacts, as well as monitor community effectiveness in mitigating negative impacts. The information gathered in this survey series has been used by the tourism industry and community representatives to address residents' concerns.

Juneau Cruise Visitor Volume

Year	Passengers
2006	951,400
2002	739,800
1998	568,500
1995	380,600

Source: Cruise Line Agencies of Alaska

It is important to view survey results in light of changes in visitor volume and infrastructure. Juneau's visitor industry has grown rapidly since the survey series began in 1995. Cruise visitor volume more than doubled between 1995 and 2006. In addition, an estimated 100,000 air and ferry passengers visit Juneau each summer. Visitor-related infrastructure development since 1995 includes the South Franklin Dock, the AJ Dock, the Seadrome Marine Complex, and the redevelopment of Marine Park. During the same time period, visitor industry businesses developed the *Tourism Best Management Practices* program to minimize neighborhood impacts from tour operators.

Juneau residents have consistently reported that they recognize both positive and negative impacts from the industry. Positive impacts may include job and wage growth, increased business activity, increased municipal tax collections, and an increase in property values. Negative impacts may include crowding of downtown sidewalks, traffic congestion, aircraft noise, smoke emissions, and increased visitor activity in neighborhoods and on trails.

This survey is a valuable and statistically reliable compilation of residents' opinions about these important and complex issues.

Methodology

The telephone survey included 508 randomly selected Juneau households using a random-digit-dial method, which ensures inclusion of both listed and unlisted households. The survey was fielded between October 11 and 20. Calls were made during daytime, evening, and weekend hours to allow participation from a wide array of Juneau residents.

To ensure compatibility with the results from previous surveys, similar sample selection methods, telephone interview protocols, and survey language were used. Data was closely monitored and weighed so respondents' age, gender and residential neighborhoods were proportionally represented. The maximum margin of error at the 95 percent confidence level is ± 4.5 percent.

The survey instrument was designed by McDowell Group, with review and input from City and Borough of Juneau staff and Assembly members. A copy of the survey is included in the report appendix.

Resident Perception of Tourism Impacts

Four out of ten Juneau residents felt that the current level of tourism in Juneau has a positive impact, while one-third felt there are both positive and negative impacts.

- In 2006, the percentage of residents who felt that tourism has a positive impact on their household remained stable at 40 percent.
- The percentage of residents who felt tourism has a negative impact on their household has remained similar since 1995.
- One-half of North Douglas residents reported that tourism has a positive impact on their household.
- Douglas/West Juneau residents were the least likely to report positive impacts on their household (25 percent).
- Downtown Juneau/Thane residents were the most likely to feel that tourism had a negative impact on their household (14 percent).
- Residents age 18-34 were less likely to feel that tourism negatively impacted their household (3 percent).

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?

	2006	2002	1998	1995
Positive impact	40%	40%	29%	34%
Negative impact	8	6	10	8
Both positive and negative impacts	34	37	43	37
No impact at all	17	15	16	19
Not sure	1	1	1	2

Among respondents who cited both positive and negative impacts on their household from tourism, nearly half felt that the benefits outweigh costs.

- In contrast, nearly one-third (32 percent) of residents felt that the costs of tourism outweigh the benefits.
- Six of ten Downtown Juneau/Thane residents felt that the costs of tourism outweigh benefits.
- One-half of all residents 55 years of age and older felt that the costs of tourism outweigh benefits.
- Sixty percent of residents employed in tourism felt that the benefits outweigh costs.

For those who answered “both positive and negative impacts”: Do you feel that the costs outweigh the benefits or the benefits outweigh the costs?

	2006	2002	1998
The benefits outweigh the costs	47%	46%	45%
The costs outweigh the benefits	32	29	32
Neutral	14	16	16
Don't know	7	8	6

Tourism Impacts on Household

The leading impacts were foot traffic and vehicle congestion.

- One-third of Juneau residents reported they were “affected” or “very affected” by foot traffic congestion while (31 percent) were “affected” or “very affected” by vehicle congestion.
- Congestion increased since 2002, when 26 percent of respondents were “affected” or “very affected” by vehicle congestion and 23 percent were “affected” or “very affected” by foot traffic.
- Helicopter noise affected 23 percent of all residents, with 14 percent stating there were “very affected.”
- A majority of households are “not at all affected” by watercraft (78 percent), airplane (65 percent), or helicopter noise (53 percent).

For each of the following tourism-related impacts, would you say your household is very affected, affected, somewhat affected or not at all affected?

	Very Affected	Affected	Somewhat Affected	Not at all Affected
Foot traffic congestion	16%	17%	23%	44%
Vehicle congestion	14	17	30	38
Helicopter noise	14	9	23	53
Airplane noise	9	8	18	65
Watercraft noise	3	4	14	78

- The percentage of respondents who reported being “very affected” by foot traffic increased from 12 percent in 2002 to 16 percent in 2006.

Juneau Tourism Impacts Trend

Percentage responding “very affected”

	2006	2002
Foot traffic congestion	16%	12%
Vehicle congestion	14	14
Helicopter noise	14	13
Airplane noise	9	11
Watercraft noise	3	3

Comparison of Tourism Impacts by Neighborhood

Downtown Juneau/Thane and Douglas/West Juneau reported the highest levels of impacts from foot traffic and vehicle congestion while the mid-town neighborhoods and North Douglas reported the highest level of impacts from helicopter noise.

- Downtown Juneau/Thane reported a higher level of “affected” or “very affected” (41 percent) than in 2002 (32 percent) for impacts related to vehicle congestion.
- The percentage of Douglas/West Juneau residents who were “affected” or “very affected” by vehicle traffic more than doubled from 2002 to 2006 (20 percent to 41 percent).
- More than one-half of Downtown Juneau/Thane residents stated they were “affected” or “very affected” by foot traffic congestion.
- There was a decline from 2002 to 2006 in the percentage of Douglas/West Juneau residents who were “affected” or “very affected” by airplane noise (30 percent vs. 18 percent) and helicopter noise (25 percent vs. 14 percent).
- There was an increase in the percentage of North Douglas residents who were “affected” or “very affected” by airplane noise (26 percent vs. 37 percent) and helicopter noise (26 percent vs. 43 percent).

For each of the following tourism-related impacts, would you say your household is very affected, affected, somewhat affected or not at all affected?

Percentage responding “affected” or “very affected”

	Downtown/ Thane n=68	Douglas/ W. Juneau n=55	Salmon, Lemon, Switzer Creek n=63	East Mendenhall Valley n=179	North Douglas n=29	W. Mend’hall Valley/ Out the road n=113
Foot traffic congestion	53%	31%	32%	28%	16%	32%
Vehicle congestion	41	41	32	25	28	29
Airplane noise	22	18	18	11	37	18
Helicopter noise	17	14	34	18	43	27
Watercraft noise	11	11	3	2	6	14

Comparison of Impacts to Prior Year

Many residents felt there were noticeable changes between 2005 and 2006 when asked to compare the effects of various tourism impacts.

- Areas in which residents did notice increased tourism impacts include the following: 34 percent noticed an increase in bus/taxi congestion downtown, 34 percent noticed an increase in crowd levels, and 28 percent noticed an increase in guided groups on hiking trails.
- Residents who work in tourism (40 percent) and those 18-34 years old (39 percent) were more likely than other residents to notice an increase in bus and taxi congestion downtown.
- One out of ten residents noted that cruise emissions, floatplane noise, and helicopter noise were “somewhat” or “very reduced” compared to 2005.

Comparing this past summer to the summer of 2005, did you notice if the following impacts were very reduced, somewhat reduced, unchanged, somewhat increased or very increased for...

	Very Increased	Somewhat Increased	No Change	Somewhat Reduced	Very Reduced	Don't Know/ Didn't Notice
Bus/taxi congestion downtown	10%	24%	41%	6%	0%	19%
Crowd levels	9	24	47	5	1	13
Guided groups of visitors on trails	7	21	38	3	<1	31
Helicopter noise	6	12	57	10	1	15
Busses and taxis in neighborhoods	4	16	56	3	<1	21
Smoke emissions from cruise ships	3	9	47	11	2	29
Floatplane noise	2	8	55	9	3	22
Cruise ship noise	1	5	61	4	2	28

Comparison of Impacts to Prior Year, by Neighborhood

Residents of Downtown Juneau/Thane, Douglas/West Juneau and Salmon Creek/Lemon Creek/Switzer Creek were more likely to report increased tourism impacts than Valley residents.

- Salmon Creek/Lemon Creek/Switzer Creek residents noticed the greatest increase (42 percent) in bus/taxi congestion downtown.
- An increase in crowd levels was noticed by Downtown/Thane residents (42 percent) and Douglas/West Juneau residents (38 percent).

Comparing this past summer to the summer of 2005, did you notice if the following impacts were very reduced, somewhat reduced, unchanged, somewhat increased or very increased for...

Percentage responding “somewhat increased” or “very increased”

	Downtown/ Thane n=68	Douglas/ W. Juneau n=55	Salmon, Lemon, Switzer Creek n=63	East Mendenhall Valley n=179	North Douglas n=29	W. Mend’hall Valley/ Out the road n=113
Bus/taxi congestion d'town	37%	37%	42%	33%	29%	27%
Crowd levels	42	38	34	32	35	28
Guided groups of visitors on trails	30	24	33	26	28	28
Helicopter noise	12	12	20	17	22	22
Busses/taxis in neighborhoods	17	22	25	19	23	16
Smoke emissions from cruise ships	12	14	13	10	18	9
Floatplane noise	14	9	13	7	10	11
Cruise ship noise	11	7	11	4	7	4

Comparison of Impacts Over Past Five Years

Two thirds of Juneau residents believe that overall tourism-related impacts have increased over the past five years.

- In 2006, 67 percent of residents thought that impacts had increased, compared to 75 percent in 2002.
- Respondents over age 55 (77 percent), downtown residents (77 percent), and those who work in tourism (77 percent), were more likely to report increased impacts.

Over the past five years, do you think overall tourism-related impacts have increased, decreased or remained the same?

	2006	2002
Increased	67%	75%
Decreased	4	4
Remained the same	21	17
Don't know/new resident	7	4

Tourism Best Management Practices Program

More residents were aware of the Tourism Best Management Practices program in 2006 than in 2002. Of those who are aware of the program, three quarters believed it had some effectiveness.

- One half of residents age 35-54 were aware of the TBMP program.
- Households with members employed in tourism were more likely than other households to be aware of the TBMP program (55 versus 39 percent).
- Awareness of the TBMP program was highest among residents of North Douglas (58 percent), West Mendenhall/Out the road (51 percent), and Douglas/West Juneau (49 percent).
- One-third of East Mendenhall Valley residents were aware of the TBMP program.

The Tourism Best Management Practices program is intended to reduce impacts on neighborhoods. Are you aware of this program?

	2006	2002	1998
No, I am not aware of the program	57%	75%	53%
Yes, I am aware of the program	43	23	46
<i>If aware, how effective have voluntary measures have been in managing tourism impacts?</i>			
Very effective	12%	13%	-
Effective	20	20	-
Somewhat effective	43	50	-
Not at all effective	12	10	-
Not sure	13	6	-

Low awareness in 2002 was likely related to the program name change from "Voluntary Compliance Program" that year.

Almost all Juneau residents who were aware of the Tourism Best Management Practices program were also aware of the TBMP crossing guards program. Respondents had less awareness of other TBMP programs.

- The crossing guard program had the highest level of awareness (92 percent) among those familiar with TBMP.
- The TBMP website was the least recognized element of the program (29 percent).

Please tell me if you are aware of each of the following Tourism Best Management Practices program activities...

(Base=those who are aware of the Tourism Best Management Practices program).

	Aware	Not Aware	Don't know/refused
TBMP hotline	36%	62%	3%
TBMP website	29	69	3
TBMP spring public meetings	42	54	4
Crossing guards	92	7	1

If residents were aware of the TBMP program element, they were asked a follow-up question about its effectiveness.

- The crossing guard program was rated as “very effective” by 42 percent of those who responded.
- Nearly 40 percent of respondents were unsure of the effectiveness of other TBMP program elements.

How effective is/are each of the following Tourism Best Management Practices program activities...

(Base=those who are aware of the specific Tourism Best Management Practices element).

	Very Effective	Effective	Not Effective	Not at all Effective	DK/Ref
TBMP hotline	12%	27%	17%	7%	37%
TBMP website	4	45	9	4	38
TBMP spring public meetings	8	33	11	10	39
Crossing guards	42	44	4	3	7

City and Borough Management of Tourism Impacts

Forty-seven percent of Juneau residents said the City and Borough is not doing enough to manage the impacts of tourism, while 45 percent believed it is doing the “right amount” or “more than enough.”

- Those who feel the CBJ is “not doing enough” declined from 52 percent in 2002 to 47 percent in 2006.
- The percent of those who think the CBJ is doing “more than enough” to manage tourism impacts increased from 6 percent in 2002 to 9 percent in 2006.
- Downtown Juneau/Thane residents were most likely to think that the CBJ is not doing enough (58 percent) followed by North Douglas (51 percent) and Douglas (49 percent).

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 tourism?

	2006	2002
Not enough	47%	52%
Just the right amount	36	34
More than enough	9	6
Don't know	8	7

Future Tourism Activity Levels

When asked if various visitor activities could be increased, maintained, or decreased, approximately half of all residents favored maintaining activities at their current level.

- Residents were most supportive of potential increases in charter sportfishing and day boat tours.
- Four out of ten residents felt that downtown bus/van/ cab and pedestrian traffic could be decreased.
- Residents expressed the most significant opinion changes for floatplane flightseeing. The percentage of residents that felt floatplane activity could be increased changed from 22 percent in 2002 to 26 percent. The percentage of residents that felt it could be decreased dropped from 14 percent to 8 percent.

In terms of impacts on the community, which of the following tourist activities do you feel could be increased, decreased, or maintained at current levels?

	Could Be Increased	Could Be Maintained	Could Be Decreased	Don't Know
Charter fishing tours	37%	42%	12%	9%
Day boat tours	36	49	8	7
Hiking and trail excursions	31	44	14	11
Whale watching tours	30	47	18	6
Floatplane flightseeing	26	58	8	8
Valley tour bus traffic	23	52	17	8
Helicopter flightseeing	20	56	19	5
Downtown pedestrian traffic	14	45	37	4
Downtown bus/van/cab traffic	12	44	38	5

Future Tourism Activity Levels, by Neighborhood

Charter fishing tours and day boat tours were most likely to be favored for increases by a majority of neighborhoods.

- Salmon/Lemon/Switzer creek residents were more likely to favor increases in hiking and trail excursions and whale watching.
- One-half of North Douglas residents felt that day boat tours could be increased.

In terms of impacts on the community, which of the following tourist activities do you feel could be increased, decreased, or maintained at current levels?

Percentage responding “increased”

	Downtown/ Thane n=68	Douglas/ W. Juneau n=55	Salmon, Lemon, Switzer Creek n=63	East Mendenhall Valley n=179	North Douglas n=29	W. Mend’hall Valley/ Out the road n=113
Charter fishing tours	30%	36%	39%	41%	42%	33%
Day boat tours	24	39	46	38	51	32
Hiking and trail excursions	18	33	43	38	33	23
Whale watching tours	20	31	40	32	39	23
Floatplane flightseeing	18	22	29	32	31	18
Valley tour bus traffic	19	28	27	25	22	17
Helicopter flightseeing	10	15	21	28	13	19
Downtown pedestrian traffic	9	14	19	17	16	10
Downtown bus/van/cab traffic	6	8	23	14	13	9

Downtown Juneau/Thane and Douglas residents felt most strongly about decreases in downtown vehicle and pedestrian traffic.

- Approximately one-half of Downtown Juneau/Thane and Douglas/West Juneau residents felt that bus/van/cab and pedestrian traffic could be decreased. These neighborhoods also reported the highest levels of “affected” and “very affected” by the impacts of foot traffic congestion and vehicle congestion.
- West Mendenhall/out the road residents were also likely to favor decreases in downtown pedestrian (34 percent) and bus/van/ cab traffic (42 percent).
- Four of ten East Mendenhall Valley residents favor a decrease in downtown pedestrian traffic and 29 percent favor a decrease in downtown bus/van/cab traffic.
- North Douglas residents felt most strongly about decreasing downtown bus/van/cab traffic (40 percent).
- Downtown Juneau/Thane (26 percent) and West Mendenhall Valley residents (21 percent) were the most likely to favor a decrease in helicopter flightseeing.

In terms of impacts on the community, which of the following tourist activities do you feel could be increased, decreased, or maintained at current levels?

Percentage responding “decreased”

	Downtown/ Thane n=68	Douglas/ W. Juneau n=55	Salmon, Lemon, Switzer Creek n=63	East Mendenhall Valley n=179	North Douglas n=29	W. Mend’hall Valley/ Out the road n=113
Charter fishing tours	12%	14%	9%	12%	11%	15%
Day boat tours	4	1	2	7	14	15
Hiking and trail excursions	20	20	5	14	7	15
Whale watching tours	20	19	7	15	20	24
Floatplane flightseeing	17	11	5	4	7	10
Valley tour bus traffic	19	18	21	16	22	15
Helicopter flightseeing	26	14	12	14	21	27
Downtown pedestrian traffic	49	48	28	37	21	34
Downtown bus/van/cab traffic	48	56	29	29	40	42

Resident Perception of Tourism Industry Contribution

As in 2002, four out of ten residents felt that the tourism industry paid its “fair share” for services used by visitors.

- Downtown Juneau/Thane residents were most likely to feel that the tourism industry paid less than its fair share for services (54 percent).
- Residents living in Douglas/West Juneau (53 percent), North Douglas (46 percent), and East Mendenhall (46 percent) were the most likely to feel that the tourism industry paid fairly for visitor services.

*Presently, in terms of services used by visitors,
do you feel the tourism industry pays...?*

	2006	2002	1998	1995
More than its fair share	6%	6%	7%	6%
Its fair share	42	42	41	39
Less than its fair share	37	36	33	28
Don't know	15	14	19	27

Future Cruise Passenger Traffic

Nearly half of Juneau residents wanted to see the number of cruise ship passengers remain the same as in 2006.

- The percentage of residents who supported an increase in the number of cruise ship passengers grew slightly from 29 percent in 2002 to 32 percent in 2006.
- Downtown Juneau/Thane residents (32 percent) were the most likely to desire a decrease in the number of cruise ship passengers.
- North Douglas (38 percent), East Mendenhall Valley (37 percent), and Salmon/Lemon/Switzer Creek residents (36 percent), were more likely to support an increase in the number of cruise ship passengers.

In the future, would you like to see the number of cruise ship passengers to Juneau increase, decrease, or remain the same as in 2006/2002?

	2006	2002
Major increase	13%	12%
Minor increase	19	17
Remain the same	47	46
Minor decrease	9	11
Major decrease	9	9
Don't know	3	4

Preferred Number of Cruise Ships

When asked for the optimal daily number of cruise ships, the leading response was five ships.

- The average daily number of ships favored by Juneau residents was 4.2, comparable to 2002 survey results.
- Residents of Salmon Creek/Lemon Creek/Switzer Creek suggested the highest daily average (4.5), followed by East Mendenhall Valley residents (4.4 ships per day).
- Downtown Juneau/Thane residents suggested the lowest optimal number of ships per day (average of 3.8 ships).

In your opinion, what is the optimal number of large cruise ships to visit Juneau, during the summer, on any given day?

2006	
None	<1%
One	2
Two	8
Three	22
Four	21
Five	23
Six	7
Seven	3
Eight	2
Nine	0
Ten	1
Average	4.2
Don't know	9
Refused	2

Infrastructure Improvement

More than one-half of Juneau residents said that improved downtown infrastructure would make them more supportive of an increase in cruise ship passengers.

- The percentage of residents who said improved infrastructure would increase their support for more cruise passengers increased from 48 percent in 2002 to 53 percent in 2006.
- Residents of North Douglas (60 percent), Salmon Creek/ Lemon Creek/ Switzer Creek (57 percent) and East Mendenhall Valley (56 percent), were more likely to support an increase in the number of cruise ship passengers if downtown infrastructure were improved.
- Douglas (50 percent) and Downtown Juneau/Thane residents (49 percent) were the least likely to support an increase in cruise ship passengers if there were improvements to downtown infrastructure.

If the downtown infrastructure were improved, such as wider sidewalks or a seawalk, would you be more supportive of an increase in the number of cruise ship passengers to Juneau?

	2006	2002
Yes	53%	48%
No	41	46
Don't know	6	5

RESPONDENT CHARACTERISTICS

Survey results generally corresponded to Juneau's population distribution, with the largest percentage residing in East Mendenhall Valley, followed by West Mendenhall Valley/Brotherhood Bridge/Out the road. Respondents most commonly worked in the Downtown Juneau/Thane area, while 19 percent were not employed or were retired.

In which areas of the city and borough do you live and in which area do you work?

	Live	Work
East Mendenhall Valley	35%	9%
West Mendenhall Valley/ Brotherhood Bridge/Out the road	22	17
Downtown/Thane	13	33
Salmon Creek/Lemon Creek/Switzer Creek	12	12
Douglas/West Juneau	11	2
North Douglas	6	<1
Work Borough-wide		8
Not employed/retired		19

The most common employer was state government followed by employment in professional services, education, construction, and federal government.

What are the primary jobs in your household?

	2006
State government	26%
Professional services	12
Education	11
Construction/trades/crafts	11
Federal government	10
Retail trade	9
Health care	8
Services	7
Local government	6
Transportation	5
Fishing, fish processing	3
Communication/utilities	3
Finance/insurance/real estate	2
Mining industry	2
Wholesale trade	2
Timber harvesting and related services	<1
Retired	14
Homemaker/student	4
Unemployed	2

Twenty-three percent of respondents reported that at least one household member had worked in the tourism industry in the last two years. The average number of tourism employees in these households was 1.4 (the same average number as in 2002).

Have you or any members of your household been employed in the Juneau tourism industry at any time during the past two years? If so, how many?

	2006	2002
Yes	23%	21%
No	77	78
Average # of household members employed in tourism	1.4 people	1.4 people

Survey results were weighed to accurately reflect the age distribution of residents. Respondents age 18-34 were the most likely (average of 2) to have multiple members of their household employed in tourism.

Age of Respondents

	2006
18 to 24 years	8%
25 to 34 years	20
35 to 44 years	27
45 to 54 years	26
55 to 64 years	11
65 years and over	9

Survey results were weighed to accurately reflect the community gender distribution.

Gender of Respondents

Male	50.4%
Female	49.6%

Juneau Tourism Community Opinion Survey 2006

Phone # _____

Survey # _____

Interviewer Name _____

Date _____

Hello, this is _____ with the McDowell Group, an Alaska research firm. We are conducting a tourism study for the City and Borough of Juneau and would like to ask your opinions about tourism.

1. FIRST, please stop me at the category that best describes your age group? -- is it . . .

- | | | |
|---|--|--|
| 1 <input type="checkbox"/> Under 18 Years of Age (ask for adult, if none, end survey) | 6 <input type="checkbox"/> 55 - 64 Years | |
| 2 <input type="checkbox"/> 18 - 24 Years | 4 <input type="checkbox"/> 35 - 44 Years | 7 <input type="checkbox"/> Over 65 Years |
| 3 <input type="checkbox"/> 25 - 34 Years | 5 <input type="checkbox"/> 45 - 54 Years | 9 <input type="checkbox"/> Refused |

Perception of Impacts on Household and Community in General

2. 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?

- | | |
|--|---|
| 1 <input type="checkbox"/> Positive impact (skip to Q 3) | 4 <input type="checkbox"/> No impact at all (skip to Q 3) |
| 2 <input type="checkbox"/> Negative impact (skip to Q 3) | 8 <input type="checkbox"/> Don't know (skip to Q 3) |
| 3 <input type="checkbox"/> BOTH (go to 2a) | 9 <input type="checkbox"/> Refused (skip to Q 3) |

2a. Do you feel that the costs outweigh the benefits or do the benefits outweigh the costs? (Example of cost is "overcrowding downtown". Example of benefit is "sales tax revenue to the City of Juneau".)

- | | |
|--|---------------------------------------|
| 1 <input type="checkbox"/> Costs outweigh benefits | 8 <input type="checkbox"/> Don't know |
| 2 <input type="checkbox"/> Benefits outweigh costs | 9 <input type="checkbox"/> Refused |
| 3 <input type="checkbox"/> Neutral | |

3. Presently, in terms of services used by visitors, do you feel the tourism industry pays . . . (Read choices 1 – 3)

- | | |
|---|---------------------------------------|
| 1 <input type="checkbox"/> More than its fair share (for services) | 8 <input type="checkbox"/> Don't know |
| 2 <input type="checkbox"/> Its fair share (for services) | 9 <input type="checkbox"/> Refused |
| 3 <input type="checkbox"/> Less than its fair share (for services) | |

Tourism Best Management Practices

4. For each of the following tourism-related impacts, would you say your household is very affected, affected, somewhat affected or not at all affected?

	Not at all Affected	Somewhat Affected	Affected	Very Affected	Don't Know	Refused
a. Vehicle congestion	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
b. Foot traffic congestion	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
c. Airplane noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
d. Helicopter noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
e. Watercraft noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>

5. Comparing this past summer to the summer of 2005, did you notice if the following impacts were very reduced, somewhat reduced, unchanged, somewhat increased or very increased for each of the following?

	Very Reduced	Somewhat Reduced	No Change	Somewhat Increased	Very Increased	Don't Know/ Didn't Notice	Refused
a. Buses & taxis in neighborhoods	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
b. Bus & taxi congestion downtown	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
c. Float plane noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
d. Helicopter noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
e. Crowd levels	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
f. Smoke emissions from cruise ships	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
g. Cruise ship noise	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
h. Guided groups of visitors on trails	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>

6. Over the past five years, do you think overall tourism related impacts have increased, decreased or remained the same?

- 1 ☐ Increased
2 ☐ Decreased
3 ☐ Remained the same
8 ☐ Don't know
9 ☐ Refused

7. The Tourism Best Management Practices program is intended to reduce impacts on neighborhoods. Are you aware of the TBMP program?

- 2 ☐ No —————> *Continue to #8*
3 ☐ Don't know/refused ————— *Continue to #7A*
1 ☐ Yes ————— *Continue to #7A*

- 7a. Please tell me if you are aware of each of the following Tourism Best Management Practices activities?

	Aware	Not Aware	Refused/DK	(If aware) 7b. How effective is/are the.....				
				Very Effective	Effective	Not Effective	Not at all Effective	Refused/ DK
TBMP hotline	1 <input type="checkbox"/>	2 <input type="checkbox"/>	9 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	9 <input type="checkbox"/>
TBMP Website	1 <input type="checkbox"/>	2 <input type="checkbox"/>	9 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	9 <input type="checkbox"/>
TBMP spring public meetings	1 <input type="checkbox"/>	2 <input type="checkbox"/>	9 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	9 <input type="checkbox"/>
Crossing guards	1 <input type="checkbox"/>	2 <input type="checkbox"/>	9 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	9 <input type="checkbox"/>

- 7c. How effective do you believe voluntary measures have been in managing tourism impacts? (Read 1-4)

- 1 ☐ Very effective
2 ☐ Effective
3 ☐ Somewhat effective
4 ☐ Not at all effective
8 ☐ Don't know
9 ☐ Refused

Recommendations for Future Planning

8. In the future, would you like to see the number of cruise ship passengers to Juneau increase, decrease, or remain the same as the summer of 2006? (Prompt for Major or Minor)

- 1 ☐ Major Increase
2 ☐ Minor Increase
3 ☐ Remain the same
4 ☐ Major Decrease
5 ☐ Minor Decrease
8 ☐ Don't know
9 ☐ Refused

9. In your opinion, considering both the benefits and impacts of cruise tourism, what is the optimal number of large cruise ships to visit Juneau, during the summer, on any given day? (*Ships over 500 passengers are considered large ships.*) # _____
8 ☐ Don't know 9 ☐ Refused

10. If the downtown infrastructure were improved, such as wider sidewalks or a sea-walk, would you be more supportive of an increase in the number of cruise ship passengers to Juneau?

- 1 ☐ Yes 2 ☐ No 8 ☐ Don't know

11. In terms of impact on the community, which of the following tourist activities do you feel could be increased, decreased or maintained at current levels . . .

	Could be Decreased	Could be Maintained	Could be Increased	Don't Know	Refused
a. Downtown pedestrian traffic	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
b. Downtown bus, van and cab traffic	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
c. Helicopter flightseeing	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
d. Floatplane flightseeing	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
e. Charter fishing tours	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
f. Valley tour bus traffic	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
g. Hiking & trail excursions	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
h. Day boat tours (Wildlife viewing, Tracy Arm)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
i. Whale watching tours	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>

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 tourism?

- 1 ☐ More than enough
2 ☐ Not enough
3 ☐ Just the right amount
8 ☐ Don't know
9 ☐ Refused

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

- 1 ☐ Juneau Downtown/Thane
2 ☐ Douglas/West Juneau
3 ☐ Salmon Creek/Lemon Creek/Switzer Creek
4 ☐ East Mendenhall Valley
5 ☐ North Douglas
6 ☐ West Mendenhall Valley-Brotherhood Bridge and OTR

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

- 1 ☐ Juneau Downtown/Thane
2 ☐ Douglas/West Juneau
3 ☐ Salmon Creek/Lemon Creek/Switzer Creek
4 ☐ East Mendenhall Valley
5 ☐ North Douglas
6 ☐ West Mendenhall Valley-Brotherhood Bridge and OTR
7 ☐ Borough wide
8 ☐ Not Employed/Retired, Etc.
9 ☐ Refused

15. What are the jobs of the *primary* wage earners in your household? (Enter # of people in household in each position)

- | | |
|---|---|
| 01 <input type="checkbox"/> State government | 12 <input type="checkbox"/> Communication, utilities |
| 02 <input type="checkbox"/> Federal government (military) | 13 <input type="checkbox"/> Wholesale trade |
| 03 <input type="checkbox"/> Local (CBJ) government (police, city employees) | 14 <input type="checkbox"/> Finance, insurance, real estate |
| 04 <input type="checkbox"/> Education (UAS, School District, Teachers) | 15 <input type="checkbox"/> Services |
| 05 <input type="checkbox"/> Healthcare (Bartlett Hospital, SEARHC, Doctors, Dentists, Nurses) | 16 <input type="checkbox"/> Transportation |
| 06 <input type="checkbox"/> Retail trade (clothes stores, supermarkets, etc.) | 17 <input type="checkbox"/> Retired |
| 07 <input type="checkbox"/> Construction, trades, crafts, printers (blue collar) | 18 <input type="checkbox"/> Homemaker, student |
| 08 <input type="checkbox"/> Timber harvesting and related services | 19 <input type="checkbox"/> Unemployed |
| 09 <input type="checkbox"/> Professional services (lawyer, clergy, engineer, architect, consultant) | 20 <input type="checkbox"/> Disabled |
| 10 <input type="checkbox"/> Fishing, fish processing | 21 <input type="checkbox"/> Other _____ |
| 11 <input type="checkbox"/> Mining industry | 99 <input type="checkbox"/> Refused |

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

- 1 ☐ Yes —————> **16a. If Yes, how many people? #** _____
2 ☐ No
8 ☐ Don't know

Thank you for participating in this important project!

17. Record gender (Don't ask) 1 ☐ Male 2 ☐ Female 8 ☐ Don't know