

**ASSEMBLY STANDING COMMITTEE
COMMITTEE OF THE WHOLE
THE CITY AND BOROUGH OF JUNEAU, ALASKA**

November 29, 2021, 6:00 PM.

Assembly Chambers/Zoom Webinar/FB Livestream

Assembly Worksession - No Public Comment taken; Zoom link

<https://juneau.zoom.us/j/95424544691> or call 1-253-215-8782 Webinar ID: 954 2454 4691

AGENDA

I. CALL TO ORDER

II. LAND ACKNOWLEDGEMENT

III. ROLL CALL

IV. APPROVAL OF AGENDA

V. APPROVAL OF MINUTES

A. June 7, 2021 Assembly Committee of the Whole Minutes

VI. AGENDA TOPICS

A. Annual Report from JCHH

B. Capital Civic Center Update

C. Tourism Survey/VITF Update

VII. SUPPLEMENTAL MATERIALS

A. RED FOLDER - Capital Civic Center Update

VIII. ADJOURNMENT

ADA accommodations available upon request: Please contact the Clerk's office 36 hours prior to any meeting so arrangements can be made for closed captioning or sign language interpreter services depending on the meeting format. The Clerk's office telephone number is 586-5278, TDD 586-5351, e-mail: city.clerk@juneau.org

ASSEMBLY STANDING COMMITTEE
COMMITTEE OF THE WHOLE
DRAFT Meeting Minutes – June 7, 2021

The Assembly Committee of the Whole Meeting, held in the Assembly Chambers and broadcasted virtually via Zoom, was called to order by Deputy Mayor Jones at 6:00p.m.

I. ROLL CALL

Assemblymembers Present: Loren Jones, Maria Gladziszewski, Carole Triem, Wade Bryson, Alicia Hughes-Skandijis, Greg Smith, Christine Woll, Michelle Hale, and Mayor Beth Weldon.

Assemblymembers Absent: None.

Staff Present: City Manager Rorie Watt, Deputy City Manager Mila Cosgrove, City Attorney Robert Palmer. Municipal Clerk Beth McEwen, Deputy Clerk Diane Cathcart

II. APPROVAL OF AGENDA

The agenda was approved as presented.

III. APPROVAL OF MINUTES

A. April 12, 2021 Assembly Committee of the Whole Draft Minutes

Hearing no objections, the minutes of the April 12, 2021 meeting were approved by unanimous consent.

IV. AGENDA TOPICS

A. Joint Meeting with the Systemic Racism Review Committee (SRRC)

Deputy Mayor Jones passed the gavel to Mayor Weldon to lead the joint meeting of the Assembly with the Systemic Racism Review Committee.

Mayor Weldon invited the Systemic Racism Review Committee to introduce themselves to the Assembly and then she turned the discussion over to SRRC Chair Lillian Worl to begin.

SRRC Members present: Chair Lillian Worl, Deputy Chair Grace Lee, Dominic Branson, Carla Casulucan, Gail Dabaluz, Kelli Patterson, and David Russell-Jensen.

SRRC Chair Lillian Worl reported that the first SRRC meeting was held on April 1, 2021 and they have held seven meetings since then. Ms. Worl shared that the main objective for the committee is to establish legislative review criteria. The SRRC provided the Assembly with a draft version of their legislative review summary.

The committee utilized three policy review tools to create their draft criteria: the King County Racial Equity Toolkit Review, the Puget Sound Review, and the Race Forward Racial Equity Impact Assessment. Ms. Worl thanked Ms. Cosgrove for helping the SRRC refine their criteria. The current plan is to use this draft to review recent ordinances and resolutions provided by Mr. Palmer at their worksession on June 15.

Ms. Gladyszewski thanked the SRRC for their work and for their draft review criteria. She asked Ms. Worl to clarify how close they are to finalizing this draft. Ms. Worl explained that their draft was close to being finalized, however they are being mindful of the scope of the review itself, as well as time constraints. The SRRC will be going through the criteria with sample ordinances and resolutions provided by Mr. Palmer to see how well it works. She added that there will likely be refinements that need to be made.

Ms. Hale thanked SRRC for their work, and described their progress as encouraging. She asked if SRRC would share the results of their review of past legislation with the Assembly. Ms. Worl clarified that the review process may take a few sessions to work through the past legislation.

Ms. Woll noted that some SRRC members have been attending other committee meetings, and asked if there were any ways for committees to assist SRRC with their legislative process. Ms. Worl thanked Ms. Woll for attending SRRC meetings, and said that some SRRC members have been attending Assembly Standing Committee meetings. She shared that at this point in time they have more questions than answers, but they are looking forward to answering those questions together. Ms. Patterson explained that SRRC members have been assigned specific committees to attend, and they are learning how to come together and work collaboratively as a committee. She mentioned that different members have various understandings of cultural differences and nuances that contribute to the work they are accomplishing as a group.

Mayor Weldon brought up the issue of timing, and did not feel that it was necessary for SRRC to complete their criteria review as soon as possible. Ms. Gladyszewski agreed that the SRRC did not have to complete their review criteria by July 1.

Mayor Weldon asked Ms. Worl if the Assembly could provide the SRRC with any additional assistance. Ms. Worl thanked the Assembly for allowing SRRC to have an ample amount of time to complete their review criteria.

Ms. Worl explained that the SRRC would like for the criteria process to be as streamlined as possible. She described a five-step review process: Step 1 would be an opportunity for the SRRC to look at the legislation and determine if it warrants further review. Steps 2 through 5 would take place if the SRRC found anything in the legislation that raised questions or cause for concern.

Mr. Bryson asked about the statistics from the demographics graph featured at the top of Packet Page 26. Ms. Cosgrove explained that the statistics on the graph were pulled from 2010 Census data. According to the 2010 Census, 69.7% of Juneau's population identified solely as White, and 30.3% identified as either a single minority group, or a combination of two or more races.

Ms. Hale asked about Step 4. She said that the Assembly is already required to undergo a lengthy legislative process, especially considering public process and scheduling meetings. She asked if

SRRC wanted to include additional steps for the Assembly to include in the process. Ms. Worl referred to Step 3, which takes the timing of the process into consideration.

Ms. Hale said she could see the potential for the Assembly to evolve to a point where they can potentially address concerning aspects of legislation early in the process. Ms. Worl said the SRRC has been having those discussions as well. She also discussed the process will evolve as CBJ staff and directors start to understand the types of questions they will be asking for each piece of legislation.

Ms. Gladziszewski asked for a clarification of the timing for the review process, how often they will meet, and how long it might take. Ms. Worl said that she did not know at this time how long it would take. The way they have discussed it, the legislation will be at the end of the process prior to Assembly action. From a learning curve perspective, it will take longer at the beginning of the process.

Ms. Hughes-Skandijs asked with respect the census statistics on the top of Page 26, referring to Question 2C, if the legislation specifically impacted a non-white population. She asked if the SRRC intends to consider further refining their definition of significantly non-white. Ms. Worl shared that the SRRC raised similar questions, and believe that more statistical information and metrics are needed.

Mayor Weldon shared that she really liked Step 1 and Step 2. She said that Step 4 might need some additional review.

Mr. Branson said that during the process of creating this draft, the SRRC compiled a bunch of thoughts they felt would be important to include in the draft. He anticipated the final will be far more streamlined.

Mr. Russell-Jensen thanked the Assembly, and mentioned that working on this committee has given him a greater appreciation for all the work the Assembly has done.

Ms. Lee echoed previous speakers' sentiments and hoped to present a more streamlined version of the draft criteria to the Assembly in a few weeks.

Mayor Weldon said that they had presented a great draft, and looked forward to work that the SRRC will bring to the Assembly in the future. Ms. Worl thanked the Mayor and Assembly for the opportunity to conduct this work. She invited the Assembly to attend SRRC meetings, and to watch the documentary on which they will base their training. She also commended the Juneau Human Rights Commission and Haifa Sadighi for co-hosting the training.

Ms. Gladziszewski asked Ms. Worl to provide additional details about the training. Ms. Worl explained that the training is a three part PBS docuseries followed by group discussions.

Mayor Weldon appreciated all of the time and hard work put in by members of the SRRC.

The Committee of the Whole ended the joint session with the SRRC and recessed starting at 6:54p.m. The meeting resumed at 7:05p.m.

B. AEL&P Update

AEL&P President and General Manager Connie Hulbert provided an extensive Energy Update presentation for the Assembly. Ms. Hulbert was joined in her presentation by AEL&P senior staff members which provided presentations relating to their specific areas of operation. Highlights included spoke to current and recent AEL&P operations, such as their response to the December 2 landslides, Storage Lake Levels, and the possibility for droughts. She answered numerous questions from Assemblymembers.

Ms. Woll asked if a potential change in precipitation patterns would affect AEL&P operations. Ms. Hulbert said that it potentially could affect operations, but it is hard to determine given the unpredictability of weather.

Significant additions and replacements by AEL&P include the Gold Creek Flume Replacement, the Snettisham Transmission Line, and Streetlights. There was a discussion regarding DOT streetlights vs. CBJ streetlights.

AEL&P also highlighted their Customer Outreach and Education, which involves the use of public communication methods such as informational posters/flyers, and social media posts.

Mr. Jones thanked AEL&P for their presentation.

The Committee of the Whole took a break at 8:50p.m. The meeting resumed at 9:05p.m.

C. Cruise Ship Dock Electrification Update

Mr. Watt recommended that the Assembly make a motion to put a resolution of support for the RAISE Grant on the agenda.

MOTION by Ms. Hale for the Assembly to direct the City Manager to put a Resolution of Support for the RAISE Grant on the Agenda. *Hearing no objections, the motion passed by unanimous consent.*

D. Discussion on Definition of Assembly Liaison – Assembly Rules of Procedure draft Resolution 2949 from HRC

The Human Resources Committee reviewed Resolution 2949 v HRC1 on May 24, 2021, and referred it to the Committee of the Whole for discussion. Resolution 2949 vCOW1 has been revised to reflect the adoption of Resolution 2747 at the May 24 Assembly meeting.

This resolution would clarify the role of liaisons. All of the proposed liaison amendments are located on Page 8 of the resolution.

Mr. Bryson shared that the HRC discussed these terms and their definitions at the last HRC meeting.

Ms. Hale was concerned about the Board Liaisons being able to contribute in discussions, but Assembly Liaisons not being able to participate in discussions unless invited by the Board Chair. She felt that this would stifle Assemblymembers from participating in discussion.

Mr. Bryson explained the intent was for the Assemblymember to be able to summarize the events of the meetings they attend, rather than influence them.

Mayor Weldon agreed with Mr. Bryson's intent of the Assembly Liaison being a role primarily meant to report back to the Assembly.

Ms. Gladziszewski recommended removing the language "shall have a right to participate" on Lines 5 and 6, to clarify the wording and help avoid confusion regarding the role of liaison.

Mayor Weldon disagreed with the removal of the wording, but would agree to changing "shall" to "may".

MOTION by Ms. Gladziszewski to change the wording on Line 5 from "shall" to "may".
Hearing no objections, the motion passed by unanimous consent.

MOTION by Ms. Gladziszewski to change the wording on Line 32 from "Liaison should not" to "Liaison may participate in Board or Committee discussions when invited by the Chair."
Hearing no objections, the motion passed by unanimous consent.

Ms. Triem mentioned that she did not agree with Board members participating in Committee deliberations, particularly someone from a non-elected board having influence in an Assembly meeting.

Mr. Bryson referred to an instance in which a liaison objected to an Assembly vote, and spoke in support in clarifying the role of liaison as a non-deliberation role.

Ms. Gladziszewski argued that liaisons should be able to provide input to the Assembly, but would understand if the definition of the role needed to be clarified.

MOTION by Mayor Weldon to remove the word "deliberation" on Line 9 and replace it with "discussions". *Hearing no objections, the motion passed by unanimous consent.*

Mr. Jones spoke to the importance of clear communication between the Assembly and the Board Liaisons.

MOTION by Ms. Gladziszewski to forward Resolution 2949 to the full Assembly.

Mr. Bryson mentioned that Zoom meetings have made it easier for Board liaisons to be included in conversations.

Hearing no objections, Resolution 2949 was forward to the Assembly by unanimous consent.

E. Travel Marketing Ordinance

The attached draft ordinance has not been introduced and is presented to the Committee of the Whole for discussion. If the Assembly were to adopt this ordinance, the ordinance would change the travel marketing services from a grant to a competitive solicitation (i.e. request for proposals). The Assembly would retain complete control of the contract terms and travel marketing priorities.

MOTION by Mr. Jones for the Assembly to refer this draft ordinance to the LHEDC.

Objection by Ms. Hale. Ms. Hale questioned why this ordinance had been initiated at a COW meeting, rather than with the LHEDC.

Mr. Jones explained that the Assembly Rules of Procedure permits an Assemblymember to bring forward a request on an ordinance, and he thought it should go through the COW rather than wait until June 14.

Objection by Mayor Weldon. Mayor Weldon referred to the letter presented by Travel Juneau, and asked Mr. Jones why they were asking for the change.

Mr. Jones referenced previous Resolutions that were passed in the 1980s that led to a lack of competitive funding for organizations like Travel Juneau.

Ms. Hughes-Skandijs spoke in support of this ordinance. She said that she would like to change the grant, and that doing so would not be a drastic move for the Assembly to pursue.

Mr. Bryson mentioned the possibility of a non-Alaskan firm replacing Travel Juneau, and potentially using the cheapest methods possible to produce marketing strategies for Juneau. For this reason, he does not feel that opening this up to an open bid process would be beneficial for Juneauites.

Ms. Gladziszewski said that this was a good time to have this conversation, acknowledged that this had not been thoroughly examined since the 1980s.

Mr. Smith agreed that the LHEDC might be able to look at the current state of Travel Juneau and develop strategic, tactful ways to make improvements.

Ms. Woll spoke in support of forwarding this to LDEHC for further discussion.

Mayor Weldon maintained her objection.

Roll Call Vote on Motion:

Ayes: Jones, Hughes-Skandijs, Woll, Gladziszewski, Smith.

Nays: Hale, Bryson, Triem, Mayor Weldon.

Motion passed. Five (5) Ayes, Four (4) Nays.

F. Ordinance 2021-20 An Ordinance Amending the Compensation for Assemblymembers, the Mayor, and Certain Boards.

CBJ Charter section 3.10 provides the Assembly – by ordinance – shall provide for compensation for the Mayor and other Assemblymembers. However, an ordinance that increases Assemblymember compensation shall not take effect until after the October election.

This ordinance would establish the compensation for the Planning Commission and the Hospital Board of Directors at \$225 per month, establish the compensation for the Mayor at \$3,500 per month, and establish the compensation for other Assemblymembers at \$750 per month.

Currently, this ordinance has an effective date of January 1, 2022.

On March 10, 2020, the Assembly Finance Committee amended this ordinance to include the Planning Commission and Hospital Board. On May 5, 2021, the Assembly Finance Committee also discussed this topic.

This ordinance was introduced on May 24, 2021, and referred to the Committee of the Whole.

Ms. Triem asked Mr. Palmer to clarify that compensating the Hospital Board would not require them to complete any state financial disclosures.

Mr. Palmer shared that he did not know that specific answer, he would need to research that answer.

Ms. McEwen explained that the statute specifically call out the Assembly, the Planning Commission, and any members of an elected utility board; it does not mention any other types of boards, thus not requiring Hospital Board members to complete a financial disclosure statement.

Mr. Bryson shared that he had contemplated this topic for a considerable amount of time, and believes that it is time for an increase. He mentioned that his role as an Assemblymember is the lowest paying job he has ever had. Mr. Bryson encouraged the Assembly to consider the compensation for every Assemblymember that might ever want to serve. He said the Assembly should reflect the entire community, and potential Assemblymembers should be able to run for office without having a secondary financial support system, such as being retired or owning a business. Mr. Bryson believed that raising the compensation rate for Assemblymember would allow the Assembly to be inclusive to the entire community.

Amendment #1 by Mr. Bryson to create an addition which would amend the section that states “On January 1, 2025,” the compensation amount would be automatically amended to read, “The Mayor shall be compensated at the rate of \$4,000 per month, all other Assemblymembers shall

be compensated at the rate of \$1,000 per month, per diem payments, reimbursements for expenses and election of health insurance are not compensation under this section.”

Mr. Bryson explained the timing of his amendment, which would not be applicable to any current Assemblymembers unless they were to be re-elected through another election cycle. He also mentioned past Assembly members – Mayor Becker, Mayor Koelsch, and Mayor Sanford – who had all previously started that Assembly pay should be raised. Mr. Bryson also said that the Assembly Charter requires the Assembly to review their compensation rate every two years, and believed that neither this Assembly or the Assembly before have fulfilled that requirement in previous years.

Objection by Mr. Jones. Mr. Jones was concerned about the difference between this pay rate increase and the Assembly Compensation Committee. He suggested the removal of the years.

There was a discussion about the Mayor’s pay rate versus the Assemblymembers pay rate.

Objection by Ms. Gladziszewski. She was concerned about the Mayor receiving a \$48,000 salary for a part-time job.

Objection by Mr. Smith. He said that he was struggling with the optics of deciding their own salary, and mentioned the Legislative having a voter-led commission to determine their salary rates.

Ms. Triem asked for clarification about Mr. Bryson’s comments on how salary reconsideration is required in the Assembly Charter.

Mr. Palmer was not aware of any place in the Assembly Charter that requires the Assembly to look over their salary every two years.

Mr. Bryson shared that he may have read the Charter wrong.

Roll Call Vote on Amendment #1:

Ayes: Bryson, Triem, Woll, Hale,

Nays: Smith, Hughes-Skandijs, Gladziszewski, Mayor Weldon, Jones.

Amendment #1 failed. Four (4) Ayes, Five (5) Nays.

Amendment #2 by Ms. Hale to amend the periodic review section by striking “...or a compensation commission appointed by the Assembly.” And to remove the word “two years” and replace it with “five years”. The amended section would read: “The Assembly shall review the compensation for elected and Assembly-appointed Boardmembers every five years.” Ms. Hale also wanted to completely strike Section C.

Ms. Hale explained her amendment, saying that the Assembly did not need to hide behind a compensation commission.

Objection by Ms. Gladziszewski. She felt that leaving the language as stated would allow for the next Assembly to either move forward with their decisions, or appoint a commission. She added that she liked changing the period review time from two years to five years.

Objection by Ms. Triem. She said that this amendment would make it difficult for the Assembly to get anything done. However, she liked the five year addition.

Mayor Weldon spoke in favor of the amendment, adding that she also liked the five year change.

MOTION by Mr. Smith to bifurcate the amendment and separate the five year concept from the rest of the amendment. Hearing no objections, that motion passed.

Amendment #2(A) – Change Section A to allow the Assembly to review compensation for Elected and Assembly Appointed Board Members every Two Years, and Strike Section C

Roll Call Vote on Amendment #2(A):

Ayes: Bryson, Hale, Mayor Weldon.

Nays: Smith, Woll, Hughes-Skandijs, Triem, Gladziszewski, Jones.

Amendment failed. Three (3) Ayes, Six (6) Nays.

Amendment #2(B) – Amend the Periodic Review from every two years to every five years. Hearing no objections, Amendment #2(B) was adopted by unanimous consent.

MOTION by Mayor Weldon to forward Ordinance 2021-20, as amended, to the Full Assembly and asked for unanimous consent.

Objection by Mr. Smith for purposes of an amendment.

Amendment #3 by Mr. Smith to strike Section 6, the Hospital Board of Directors Compensation Section.

Mr. Smith spoke to his amendment, saying that \$225 is not enough incentive for Hospital Boardmembers.

Objection by Mr. Jones.

Ms. Gladziszewski spoke in support of this amendment, as she felt that the Assembly has not discussed the concept of paying the Hospital Board.

There was a discussion about the financial aspect of the Hospital Board.

Ms. Woll asked if the Planning Commission had access to health insurance benefits, like the Assembly, and would this amendment potentially change that.

Ms. Cosgrove said that the answer to that question is no.

Roll Call Vote on Amendment #3

Ayes: Smith, Gladziszewski

Nays: Hughes-Skandijis, Bryson, Hale, Triem, Woll, Mayor Weldon, Jones.

Amendment failed. Two (2) Ayes, Seven (7) Ayes.

Hearing no objections, Ordinance 2021-20 was forwarded to the Full Assembly as amended.

G. Resolution 2957 A Second Resolution Authorizing the Manager to Enter into Port Agreement with Cruise Line Corporations for the Purpose of Satisfying Requirements of the Centers of Disease Control and Prevention to Allow Cruise Ships to Visit the Port of Juneau in Calendar Year 2021.

Over the last few months, the Centers for Disease Control and Prevention (CDC) has issued orders and technical guidance for cruise ships to resume carrying passengers. One of the CCD requirements is for each port to sign a Port Agreement outlining important health and safety terms. The various ports in Southeast Alaska are working together with the Alaska Department of Health and Social Services to develop Port Agreements. On May 24th, the Assembly passed Resolution 2955 which authorizes the Manager to enter port agreements for vaccinated cruises.

This resolution is more specific to authoring visitation by cruise lines that have traditionally catered to families, including minors that are not yet eligible for vaccination. This resolution would authorize the Manager to only sign a Port Agreement if (1) the cruise lines provide the ship schedules in advance and (2) the cruise lines agree to the requirements of the CDC (including a simulated voyage); (3) that a minimum of 90% of the total number of passengers are vaccinated, (4) that all adults and crew are vaccinated and (5) that no more than 5% of the ship capacity is filled by unvaccinated minors. The Cities of Hoonah, Ketchikan, and Skagway are in the process of signing similar port agreements.

Mr. Watt recommended that the Assembly forward this to the full Assembly for action at the June 14 Regular Assembly meeting.

MOTION by Mayor Weldon to forward Resolution 2957 vCOW1 to the full Assembly for consideration at the June 14 Regular Assembly meeting.

Objection by Mr. Smith for purposes of a question. Mr. Smith asked if there had been any input from professional healthcare organizations like CDC.

Mr. Watt spoke to the possible risk with this resolution, and added that CDC had established a rather thorough health and safety plan for cruise ships to operate. He said that there are a lot of different ways to look at this.

Mr. Smith removed his objection.

Ms. Gladziszewski found that the mathematical aspects of this resolution would allow for this resolution to happen safely.

Ms. Hale spoke in favor of this resolution, and mentioned that the cruise ship's vaccination rate would be better than Juneau's current vaccination rate.

Hearing no objections, Resolution 2957 vCOWI was forwarded to the full Assembly for consideration at the June 14 Regular Assembly meeting.

V. ADJOURNMENT

There being no further business to come before the Assembly, the Committee of the Whole meeting was adjourned at 10:21p.m.

Minutes drafted by Administrative Assistant Lacey Davis and respectfully submitted by Municipal Clerk Beth McEwen this 29th day of November, 2021.



CBJ Assembly
Committee of the Whole
155 S. Seward St.
Juneau, AK 99801

November 22, 2021

Dear Committee Members,

Thank you for the opportunity to share updates from the Juneau Coalition on Housing and Homelessness. We are a 20+ member organization, comprised of shelter and housing programs providers, service organizations, Tribal program providers and concerned community members. Our goal is to end homelessness in Juneau.

While the goal is simple, the strategies and programs involved in ending homelessness are not. Our continuum of care, which spans emergency shelter, transitional housing, permanent housing and supportive services, is layered and interconnected. Today, we are hoping to provide you with updated information about our progress and priorities for the past 18 months.

- **Juneau Housing First Collaborative (JHFC), Phase II:** This project increased capacity at Forget Me Not Manor, adding 32 new units of permanent supportive housing for individuals who experience chronic homelessness. As of this writing, all new units are occupied and receiving support from Glory Hall staff and JAMHI Health and Wellness, which operates an on-site primary care clinic and supports a behavioral health therapist and case workers dedicated to the residents of Forget Me Not Manor.
- **Shéiyi Xaat Hít (SXH- Spruce Root House):** The youth shelter and rapid rehousing programs through THRHA and ZGYC have filled a gap in the community. Youth have a safe place to go when they are in need, and the supportive relationships and connections built have been overwhelmingly positive. The rapid rehousing program has housed three youth in the community in their own apartments and three youth in the apartment at SXH. SXH has provided over 200 nights of safe shelter to date.
- **The New Glory Hall (TGH)-** The Glory Hall was able to finish their new facility in the valley, which provides 43 individual spaces and 15 overflow spaces to individuals experiencing homelessness. The facility has been full since its opening in late July of 2021. In addition, due to the thoughtfully designed space, those experiencing homelessness in Juneau are receiving important services on site. Front Street Community Health Center comes out to the Glory Hall twice a week to provide primary care to individuals experiencing homelessness. Other partners, such as the Tlingit and Haida Regional Housing Authority and Veterans Affairs Administration, are also on site. The new space has resulted in the ability to move people out of homelessness and crisis throughout the Continuum of Care. Since being sheltered in the new facility, 42 people have moved on from the Glory Hall to long term rehabilitation, transitional or permanent housing, employment or to another community where more support is available. The Glory

Hall was able to get most of their dinner volunteer groups back and is providing an important meal service within the community, significantly reducing hunger insecurity among individuals experiencing homelessness.

- **Tlingit & Haida Non-Congregate Reentry & Recovery Shelters-** Through the Reentry & Recovery department, Tlingit & Haida operates three non-congregate shelters for our community members transitioning from incarceration or walking their recovery pathway.

The three properties include:

1. A 15-bedroom home for men with a focus on supporting our formerly incarcerated fathers in their work towards unification and repairing relationships with their children (Alaway Avenue).
2. A uniquely structured 12-bedroom men's property built around a large courtyard to create outdoor gathering and gardening space (spring 2022). This property is located in an area that allows us to house those with sex offenses, a population that is often overlooked with minimal resources and opportunities (Allen Court).
3. A women's home that provides a comfortable home-like environment for up to five women plus a live-in peer mentor. As covid mitigation and funding allow, this property will increase kid-friendly space for our mothers working towards unification with their children (Haven House).

All three properties offer transitional shelter for residents for up to two years as they are supported with case management, finding and maintaining employment, and developing accountability for sobriety through curfews and nightly breathalyzer check-ins. Currently expanding programming includes life skills classes, cultural learning opportunities, and a dedicated carving shop for residents of all properties.

- **Coordinated Entry-** Our community continues to practice a system of data-driven, assessment-based prioritization to ensure the most appropriate programming is matched with a particular person or family's experience of homelessness. Currently, Juneau Housing First Collaborative, St. Vincent de Paul (SVdP), AWARE and Family Promise use the system of coordinated entry to prioritize residents for permanent, transitional and rapid rehousing programs. Providers have become the Lead Agency for our City and are looking forward to a smooth process together with Alaska Homeless Management Information System Contractor, Institute for Community Alliance (ICA).
- **Cold Weather Shelter-** SVdP operated the cold weather shelter continuously during much of the COVID pandemic. This service was an invaluable tool as other shelters had to limit capacity due to social distancing requirements during the height of the pandemic. SVdP staff went above and beyond to ensure everyone had a bed during one of the most difficult periods in Juneau's history. After the CW Shelter closed during the summer, coordinated with the opening of the New Glory Hall, it became apparent to providers that we would likely still need an emergency cold weather service after the close of the campground in October. Resurrection Lutheran Church has since revived the Cold Weather Shelter temporary format, and has stepped in to operate when temperatures are predicted to be below 32 degrees. The speed and flexibility shown by both organizations during difficult times is a demonstration of the strength of Juneau's Continuum of Care.
- **Permanent Housing-** While St. Vincent de Paul (SVdP) was extremely active in its Warming Shelter activities, for every guest given a cot for a night, at least three other vulnerable low income community members were housed by SVdP, in secure, safe rooms and apartments where many transition out of homelessness. SVdP faced a second challenge with rising insurance rates and severe deferred maintenance issues, and it has started an aggressive facility improvement campaign through private donations, AMHTA grants, and a generous matching donation that allowed for significant improvements this summer and fall with even more improvements planned for next year. This low income housing and

other efforts to expand that market are part of the key to ending homelessness by providing a safe and affordable housing for the those who need it most.

The Juneau Coalition on Housing and Homeless is firm in our belief that shelter stays should be rare, brief, and non-recurring. It is also through this collaboration that providers analyze gaps in service, make plans for programming, and share innovation and burdens. While there have been many more gains during the last 18 months than are highlighted in this report, we at the Coalition understand there are still challenges facing Juneau's houseless citizens. We appreciate the opportunity to share and collaborate with CBJ in order to meet those challenges with compassion, resources and care.

Thank you for your time,

mandy cole

Mandy Cole

Juneau Coalition on Housing and Homelessness



City and Borough of Juneau
City & Borough Manager's Office
155 South Seward Street
Juneau, Alaska 99801
Telephone: 586-5240 | Facsimile: 586-5385

TO: Deputy Mayor Gladziszewski and Assembly Committee of the Whole

DATE: November 23, 2021

FROM: Rorie Watt, City Manager

RE: Capital Civic Center Update

The alliance of the Juneau Chamber of Commerce, Travel Juneau, the Juneau Arts & Humanities Council and the Partnership Board have been working on a plan for the Capital Civic Center project. Several plan views of the proposed project are included in the packet. The project is conceived as one building, an expansion of Centennial Hall including upgrades to satisfy the goals of the business community, the travel industry and the arts economy.

A professional cost estimator evaluated the very preliminary plan and concluded a \$65M construction cost, including an additional escalator of 30%. This construction cost estimate does not include the many non-construction costs. At this very early point in a project, staff believes that an estimate of up to \$77M is appropriate. All clients want cost certainty in construction projects, proposed or actual, and cost can be a frustrating, moving target. Budget discipline would be required to bring in any project to any particular budget.

In any project, the owner has to determine whether a project is cost driven or scope driven and has to manage to that purpose. In this case, if the CBJ moves forward with the project, I recommend a cost driven project – one whereby project decisions are always driven by the available budget. The cost estimator saw uncertainty at least in part because they did not have clear ability to understand the scope or management of the proposed project.

These budgetary estimates certainly give pause, even to the proponents. But there are reasons to advance large capital projects now. First, capital spending can be a driver of economic activity, and it can take several years before the construction occurs. Second, the Partnership Board has secured \$6M (pledged or raised), believes that foundation funding of an additional \$10M can be secured, the CBJ has submitted a congressional request for \$25M last year and the Manager has negotiated support from the cruise ship industry – through CLIAA, to use \$10M of Marine Passenger Fees.

A large capital project like this one is a poor fit for our traditional low bid process for many reasons; foremost is the fact that the cost of low bid projects are understood at the **end** of the project. A better procurement method is a "Guaranteed Maximum Price" contractual approach (or a variant). The main reason for pursuing a GMP approach is cost certainty – the cost is declared up front and every step of the way, and a contractor/architectural/engineering/owner representative team manages to that stated budget. Such an alternative procurement is not typical of CBJ practice, but is strongly recommended in this instance. Charter 9.14 (b) (6) is the applicable section.

In order to proceed with a GMP project, the first step is a solicitation that would select a professional services team that would produce at 30% complete plan set that would be adequate for more detailed costing. The second step would be to select a construction firm under a GMP contract. A 30% complete plan set is estimated to cost \$2M.

Recommendation:

Discuss next steps on consideration of the proposed project, including appropriation of \$2M from general fund and a request for an Ordinance that would authorize an alternative procurement.

Section 9.14. - Competitive bidding.

(a) The assembly by ordinance shall provide for competitive bidding and procedures for competitive bidding.

(b) Contracts for public improvements and, whenever practicable, other purchases of supplies, materials, equipment, and services, shall be by competitive bid and awarded to the lowest qualified bidder. This subsection (b) shall not apply to purchases of:

(6) Public improvements which, upon a written finding by the Manager that it would be in the best interests of the City and Borough based on cost, timing, and other relevant criteria, may be procured by supplemental agreements amending existing capital improvement contracts, competitive sealed proposals, or by other alternative procurement methods adopted by the assembly by ordinance. The maximum dollar amount, the criteria utilized, and the methodology shall be set by ordinance.

Bullwinkle's

S.O.B.

3rd Street

Willoughby Avenue

To APK

Food Trucks

Drop-Off

Loading

Community Hall

Meeting

Ballrooms

Whittier Street

Patio

Event Space

Theater

To Downtown

Existing Armory

Loading

Food Trucks

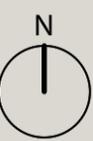
Egan Drive

KTOO

To Aakw Landing

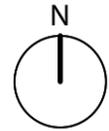
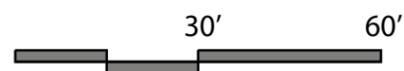
Centennial Hall Civic and Arts Center Expansion
City and Borough of Juneau
NorthWind Architects + Jensen Yorba Wall
June 24, 2021

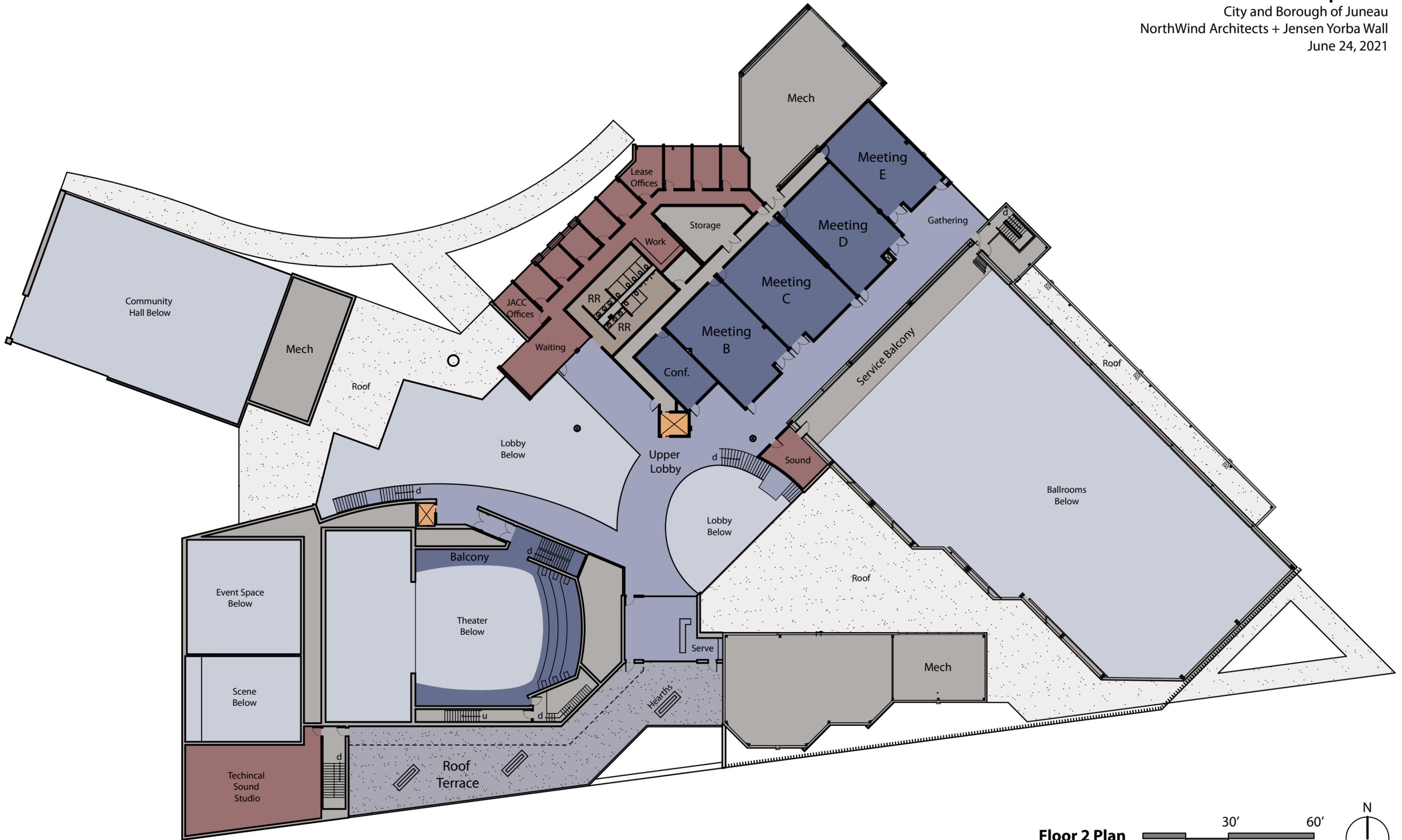
Site Plan 50' 100'



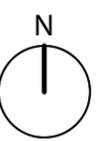
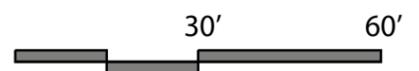


Floor 1 Plan





Floor 2 Plan





MEMORANDUM

DATE: November 29, 2021
TO: Assembly Committee of the Whole
FROM: Rorie Watt, City Manager
SUBJECT: Juneau Tourism Survey and Next Steps

Juneau Tourism Survey

In late 2019, Mayor Weldon established a Visitor Industry Task Force (VITF) to address tourism related issues. This memo provides information on the tourism survey that was performed based on the VITF recommendation for a 2021 survey of Juneau residents and on upcoming Assembly actions related to tourism.

Through a competitive process, CBJ hired McKinley Research Group, LLC, formerly McDowell Group. This consultant also performed the most recent tourism surveys issued by CBJ in 2006, 2002, 1998, and 1995. While some questions were updated for current considerations and a few questions were added to address current issues such as hot berthing and the Norwegian Cruise Line dock, efforts were made to create consistency in questions in order to gauge public perception over time. In fact, one of the interesting outcomes of the survey is that responses to many questions remained consistent over the last two decades.

Another item to note while reviewing the report is that the survey has two components, a statistically valid phone survey and a self-selected online survey. The random sample phone survey followed industry standard procedures for aligning respondents' demographics with the demographics of Juneau residents, including age, area of residence and gender. The online survey was open for all residents and the demographics of the respondents do not align closely with those of the community. For these reason, the results of the phone survey should be taken as a more accurate representation of the Juneau community. This survey will help inform future steps in implementing the VITF recommendations.

Also attached is a timeline showing key Assembly actions and decisions regarding tourism management over the coming months with final decision points highlighted. There are many moving pieces related to Support permitting, tourism management, and capital projects. These pieces are all interrelated and many are foundational to tourism management policy over the coming years.

| UPCOMING CBJ TOURISM MANAGEMENT ISSUES AND PROCESSES | | November | December | January | February | March | April | May | June | July |
|--|---|---|---|--|----------------------------|-----------------------------------|---------------------------------------|--|---|---|
| Tourism Management | Tourism Manager | Complete MOA #1 with CLIAA | Tourism Manager Begins Work 12/20 | | | | | | | |
| | Cruise Ship Schedule | | Draft 2023 Schedule Available by CLAA | | | | | | | Tour Operators Advised of 2024 Schedule |
| | Tourism Survey | Survey Delivered to Assembly at 11/29 COW | | | | | | | | |
| Budgetary Issues | CBJ Marine Passenger Fees | | Manager Requests Projects 12/1 | Draft Passenger Fee Project List | Projects Considered in CIP | | Assembly Considers CIP | | DECISION: Assembly Finalizes Budget by 6/15 | |
| | Sales Tax | On-Board Sales Tax Ordinance Intro 11/22 | DECISION: On-Board Sales Tax Ordinance Public Hearing 12/13 | | | | | | | |
| | Wharfage Regulation Fee Increase Proposal | | | Assembly COW | | | | | | |
| Planning / Permitting | LRWP Amendment | | Draft Ordinance to Assembly COW or LHEDC | Planning Commission Review | Assembly Introduction | DECISION: Assembly Public Hearing | | | | |
| | NCL Project Proposal | | NCL Applies for CUP | | | | DECISION: Planning Commission Hearing | | | |
| Tideland Issues | NCL Dock Proposal | | NCL Applies to CBJ for Tideland Lease | DECISION: Motion to Negotiate with NCL | | | | DECISION: Assembly Considers Tideland Lease to NCL | | |
| | State Tidelands | | | CBJ Applies to DNR to Acquire Additional State Tidelands | | | | | | |



McKINLEY RESEARCH
GROUP, LLC

Formerly McDowell Group

JUNEAU TOURISM SURVEY

2021

November 2021

PREPARED FOR:

City and Borough of Juneau

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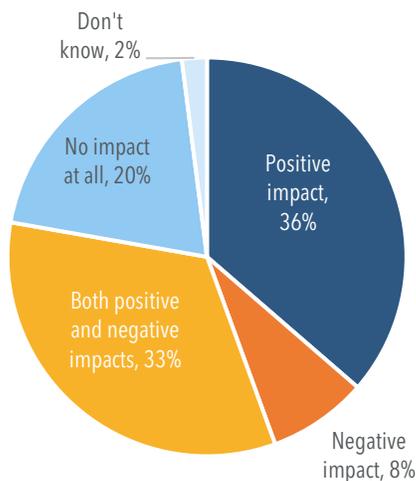
Executive Summary

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.

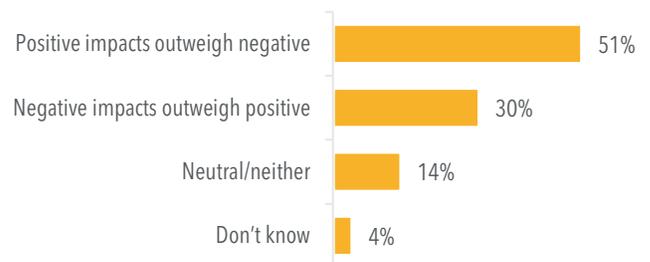
Overall Impacts: Positive vs. Negative

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?

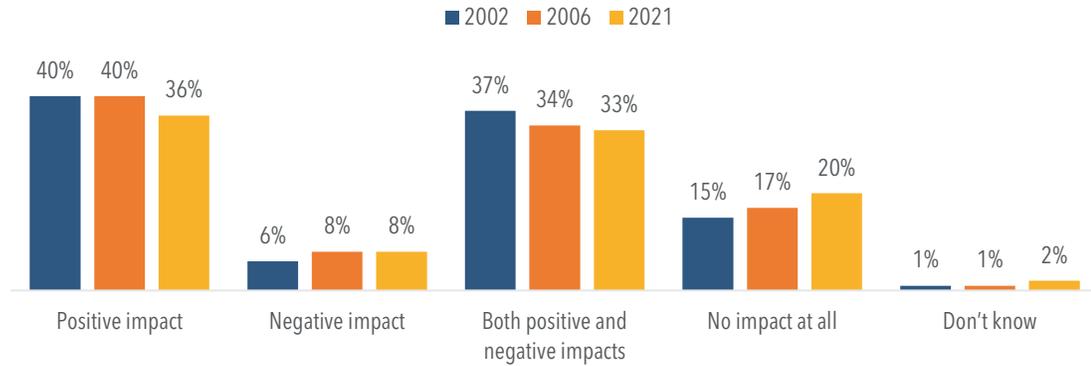


Among those who responded “Both:” Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?



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.

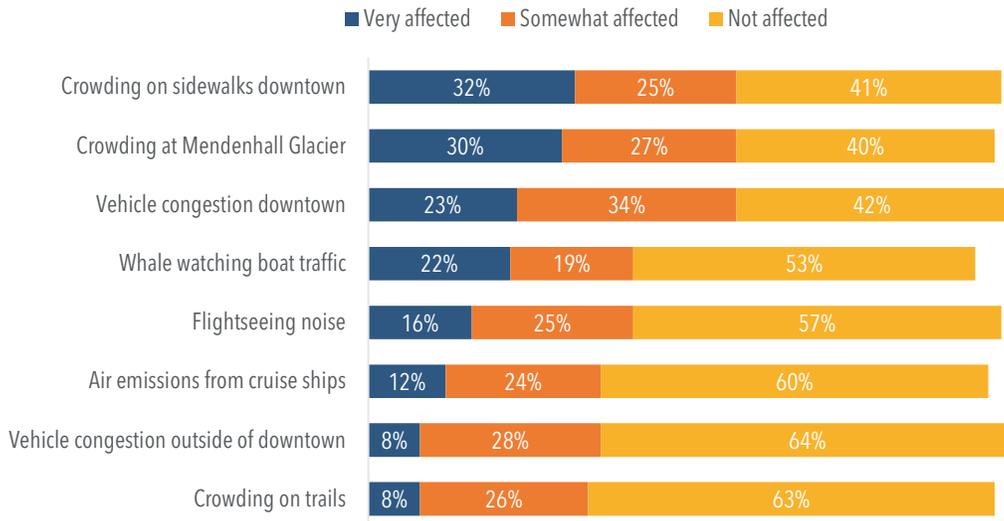
Comparison: Overall Impact of Tourism on Households, 2002, 2006, 2021



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?



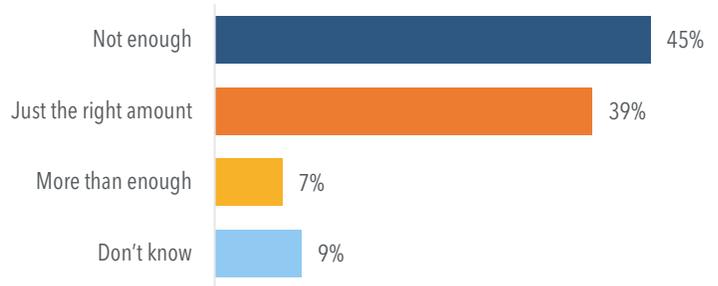
Note: Rows do not add to 100% due to don't know responses.

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?

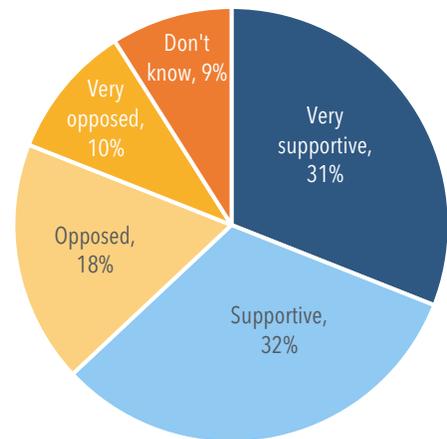


Number of Cruise Ships

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.

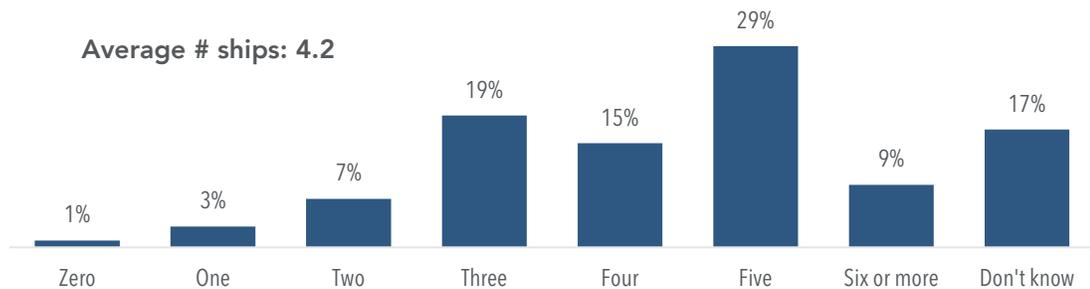
A follow-up question asked: *If it is possible to limit the number of large cruise ships per day in Juneau’s harbor, what do you think that maximum number should be?* The average number of cruise ships suggested was 4.2 ships. This average number exactly matches the average suggested in the 2006 survey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



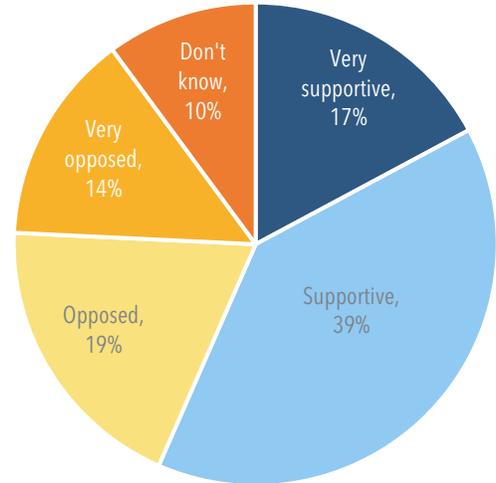
New Dock Construction

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.

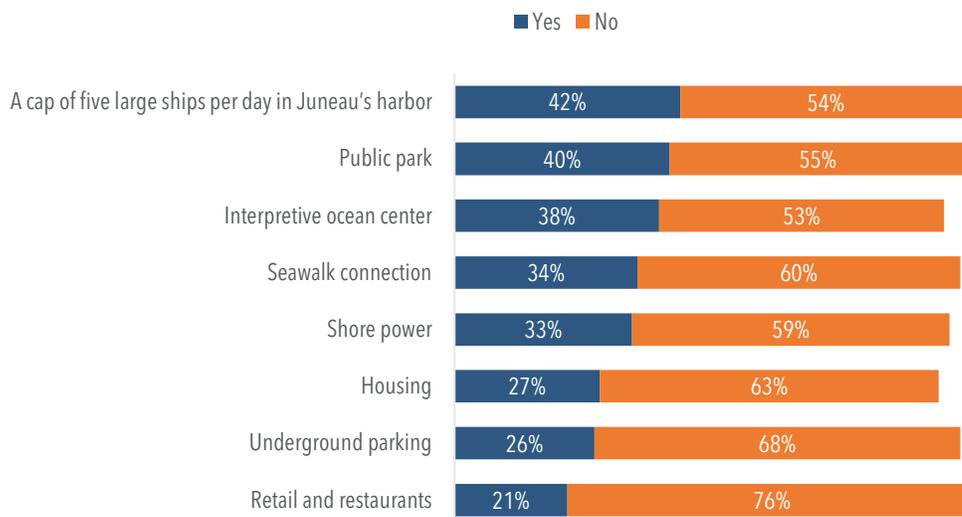
Over one-half of respondents (56%) were supportive of NCL constructing a new dock, while 33% were opposed. About equal numbers felt strongly: 17% were *very* supportive, while 14% were *very* opposed.

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 $\pm 4.3\%$ 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.

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.

Table 2. 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 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?
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 4. 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 5. Do you feel the positive impacts outweigh the negative impacts or the negative impacts outweigh the positive impacts?
Base: “Both positive and negative impacts”
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 6. TREND: Weighing Both Positive and Negative Impacts, 1995, 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 7. 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 8. 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 9. 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 10. 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 11. 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 12. 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 13. 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 (47% 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 14. 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 15. 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 16. 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 17. 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 18. “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 19% 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 19. 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 20. 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 21. 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 North Douglas 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 22. 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 23. 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 24. 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 25. 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 26. 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 27. 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 28. 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 29. 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 30. 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 31. 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 32. 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 33. 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 34. 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 35. 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 36. 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 37. 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 38. 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 39. “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 40. 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 41. 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 42. 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 43. 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 44. 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 45. 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 46. 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 47. 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 48. 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)

04 No impact at all (skip to Q5)

02 Negative impact (skip to Q5)

05 Don't know (skip to Q5)

03 Both (ask 4)

06 Refused (skip to Q5)

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

01 Positive impacts outweigh negative

04 Don't know

02 Negative impacts outweigh positive

03 Neutral/neither

05 Refused

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

| ROTATE | Very affected | Somewhat affected | Not affected | Don't Know | Refused |
|---|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| a. Vehicle congestion downtown | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| b. Vehicle congestion outside of downtown | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| c. Crowding on sidewalks downtown | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| d. Crowding on trails | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| e. Crowding at Mendenhall Glacier | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| f. Whale watching boat traffic | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| g. Flightseeing noise | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| h. Air emissions from cruise ships | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |

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

04 Don't know

02 Not enough

03 Just the right amount

05 Refused

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

- 01 Very familiar 03 Not familiar (skip to Q8)
 02 Somewhat familiar 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 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| b. Encouraging compliance with recommended operating guidelines | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |
| c. Providing opportunities for residents to give feedback to tourism businesses | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> | 5 <input type="checkbox"/> |

[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 04 Very opposed
 02 Supportive 05 Don't know
 03 Opposed 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) 04 Very opposed
 02 Supportive (skip to Q13) 05 Don't know
 03 Opposed 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 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| b. Interpretive ocean center | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| c. Seawalk connection | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |

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 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| b. Vehicle congestion outside of downtown | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| c. Crowding on sidewalks downtown | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| d. Crowding on trails | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| e. Crowding at Mendenhall Glacier | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| f. Whale watching boat traffic | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| g. Flightseeing noise | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| h. Air emissions from cruise ships | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |

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 03 Not familiar (skip to Q9)
 02 Somewhat familiar 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 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| b. Encouraging compliance with recommended operating guidelines | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |
| c. Providing opportunities for residents to give feedback to tourism businesses | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> | 4 <input type="checkbox"/> |

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

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

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 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> |
| b. Interpretive ocean center | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> |
| c. Seawalk connection | 1 <input type="checkbox"/> | 2 <input type="checkbox"/> | 3 <input type="checkbox"/> |

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November 29, 2021



Juneau Tourism Survey 2021

PREPARED FOR:

City and Borough of Juneau

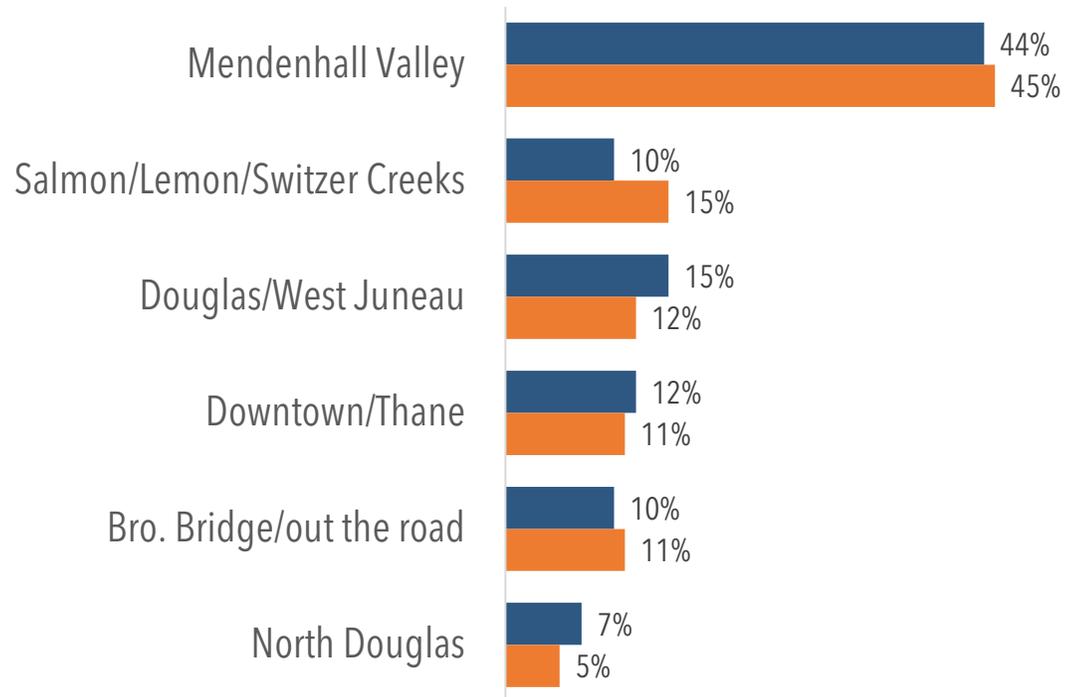
Methodology

- Telephone survey of 506 randomly selected residents
- Mix of cell and landlines
- Some questions repeated from previous surveys (1995, 1998, 2002, 2006)
- Screeners: current Juneau resident; lived in Juneau in summer 2019
- Max. margin of error: $\pm 4.3\%$
- Data weighted by age to reflect population

Phone Survey Sample vs. Juneau Population

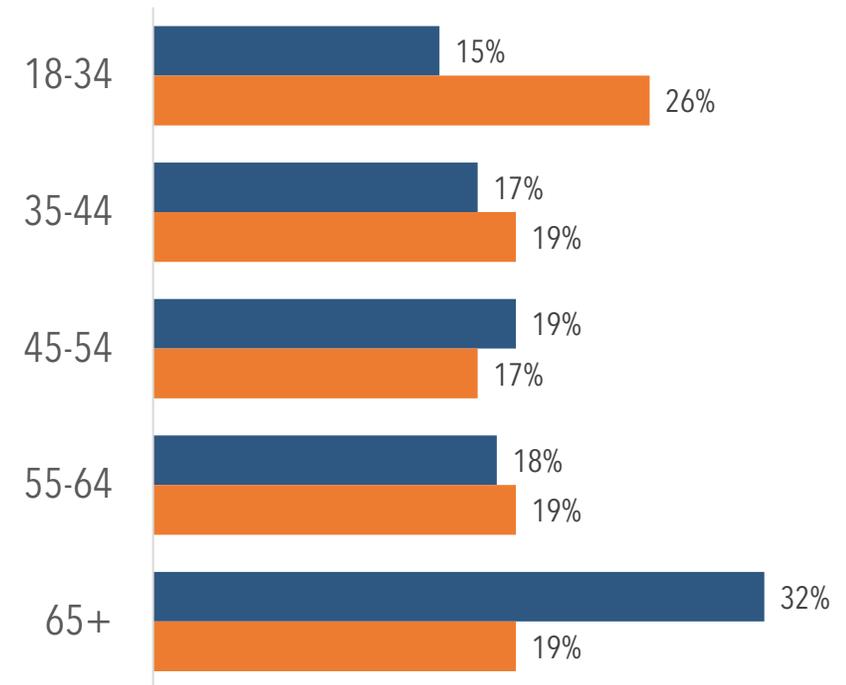
Neighborhood

■ Survey Sample ■ CBJ Population

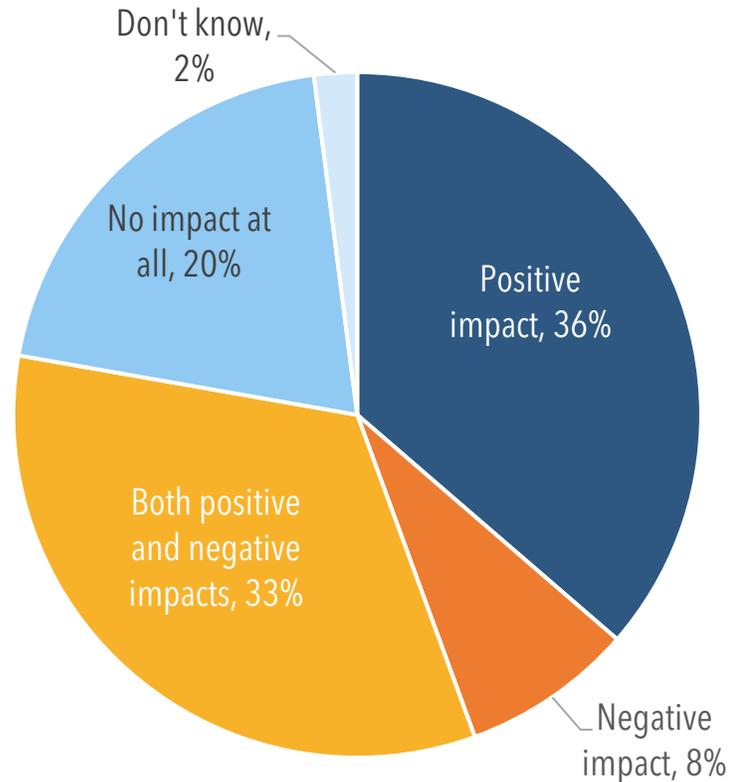


Age

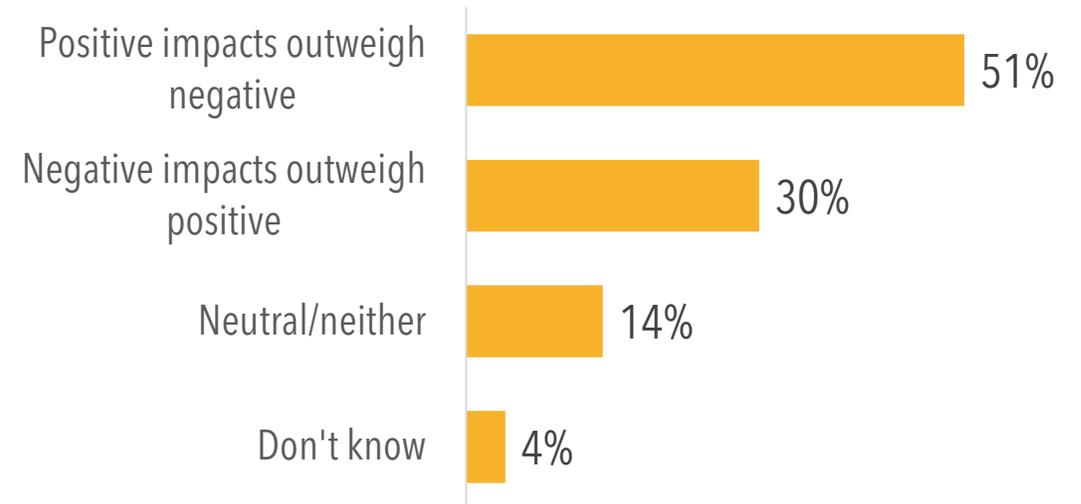
■ Survey Sample ■ CBJ Population



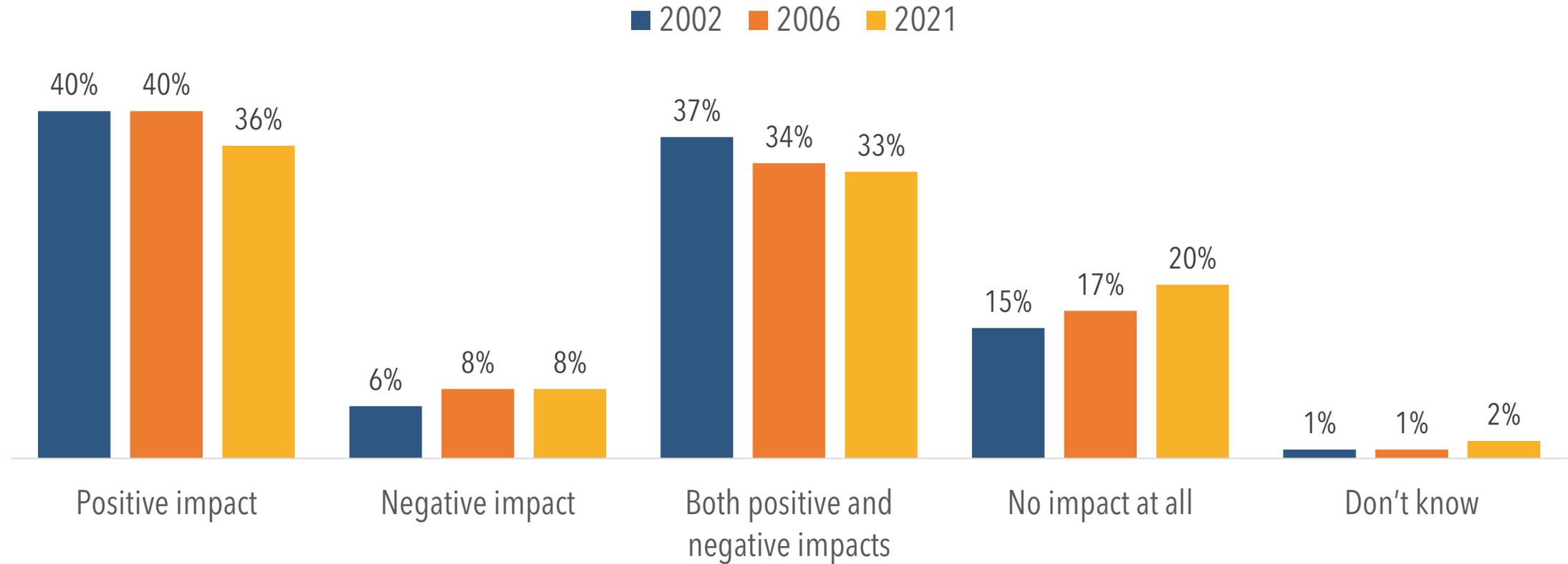
Thinking back to 2019, the last regular visitor season before COVID, do you feel the visitor industry had an overall positive impact, negative impact, both negative and positive impacts, or no impact at all on your household?



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

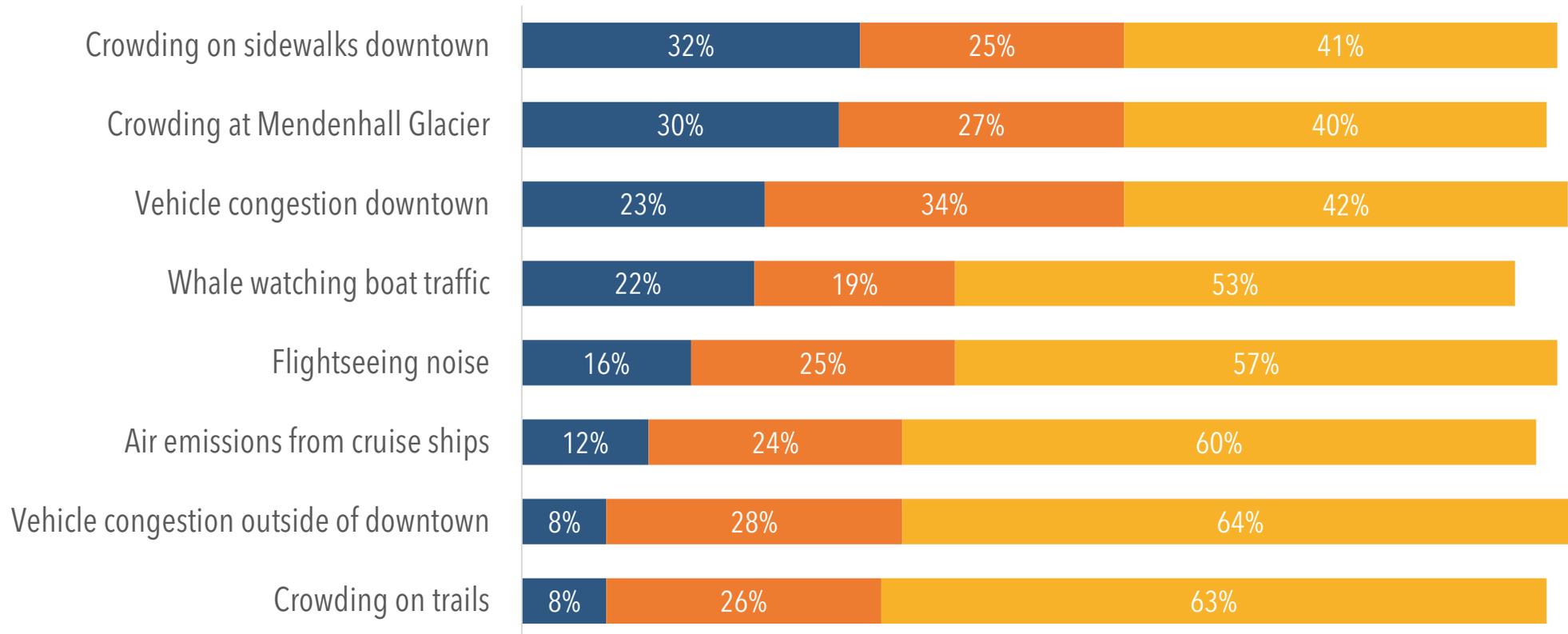


Comparison: Overall Impact of Tourism on Households, 2002, 2006, 2021



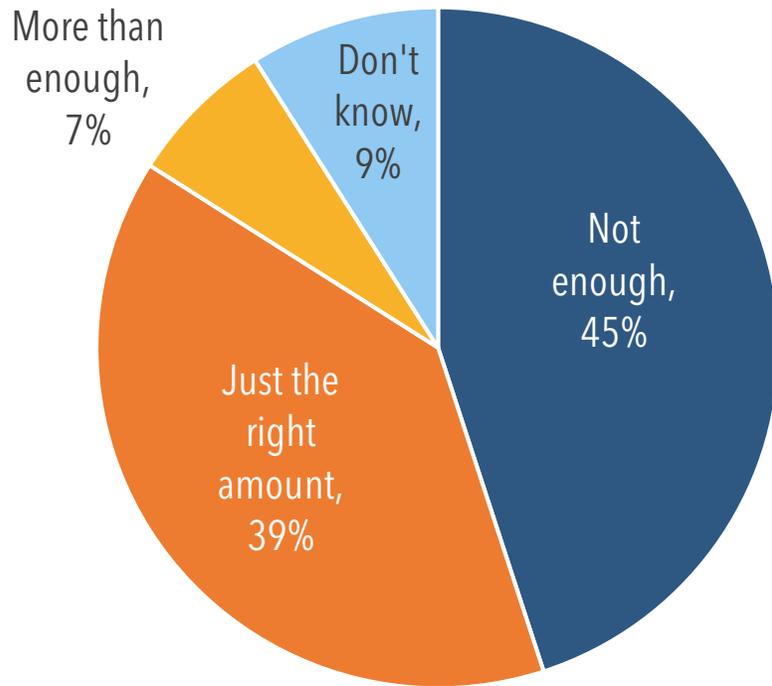
For each of the following visitor-related impacts, was your household very affected, somewhat affected, or not affected in 2019?

■ Very affected ■ Somewhat affected ■ Not affected

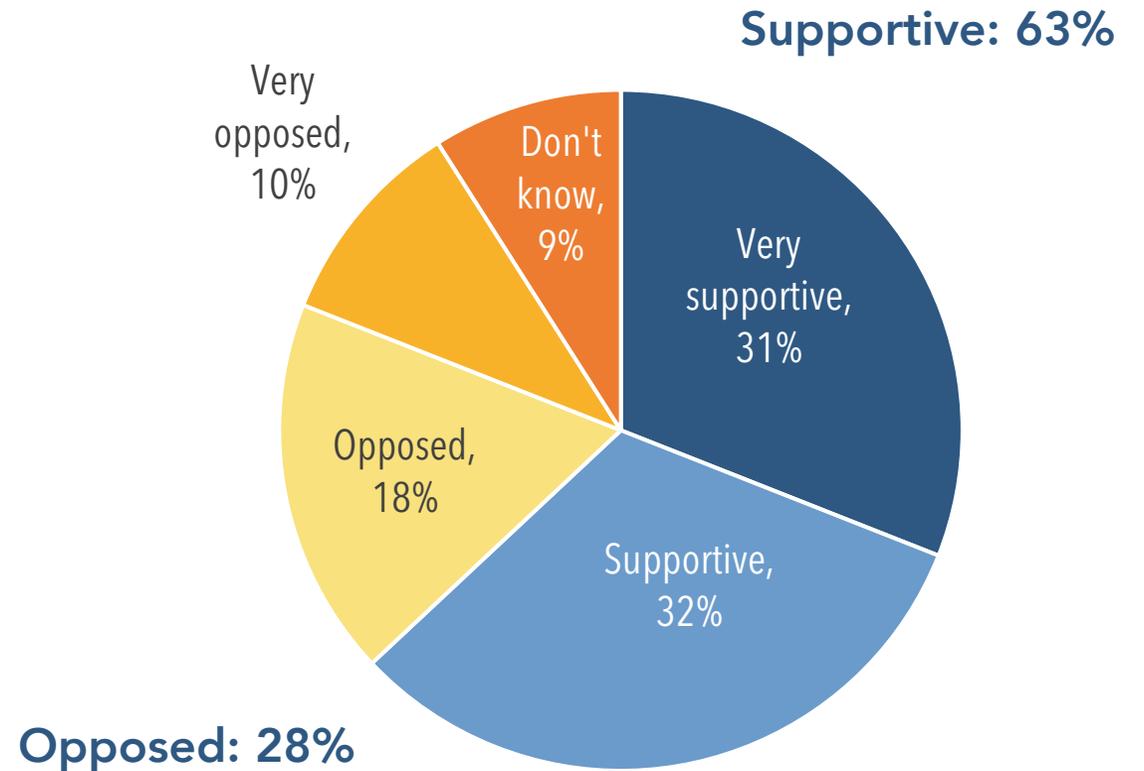


Note: Rows do not add to 100% due to don't know responses.

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?

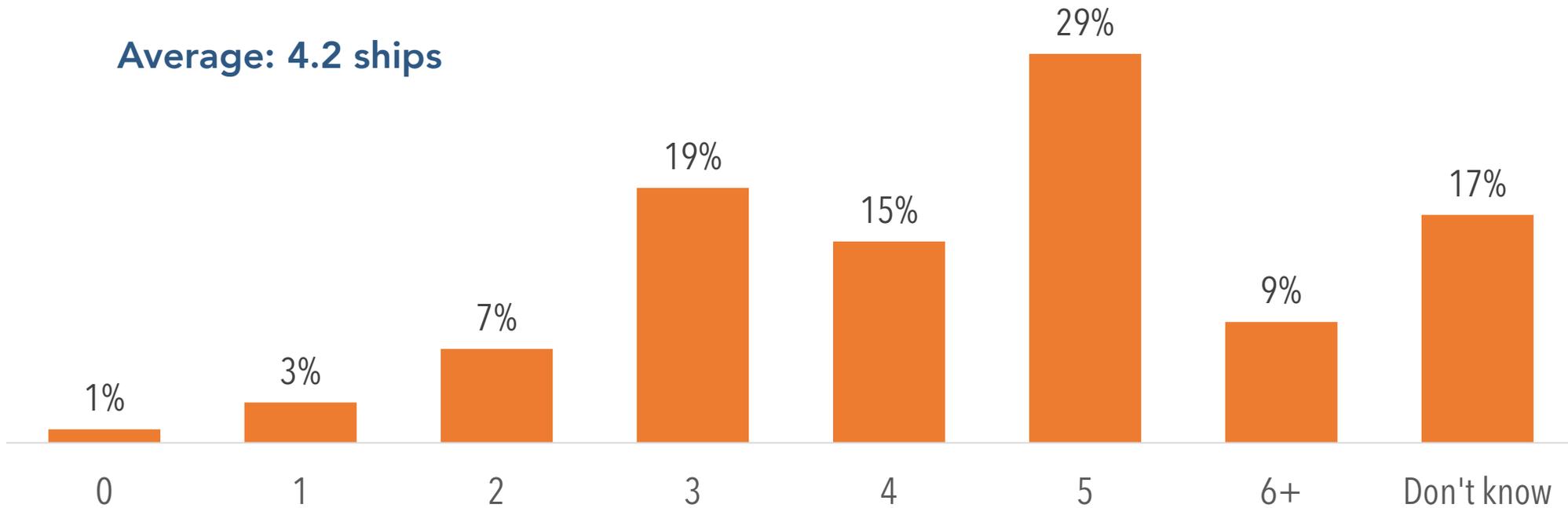


Are you very supportive, supportive, opposed, or very opposed to CBJ working to limit the number of large cruise ships* per day in Juneau's harbor?



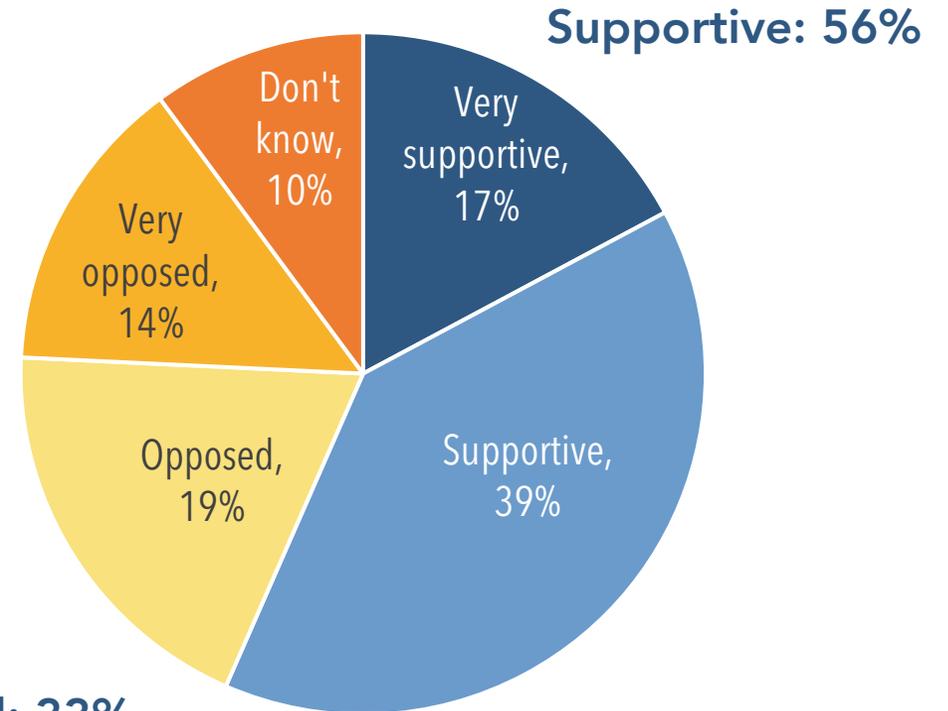
*Defined as 500 or more passengers

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?



(Read before 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.

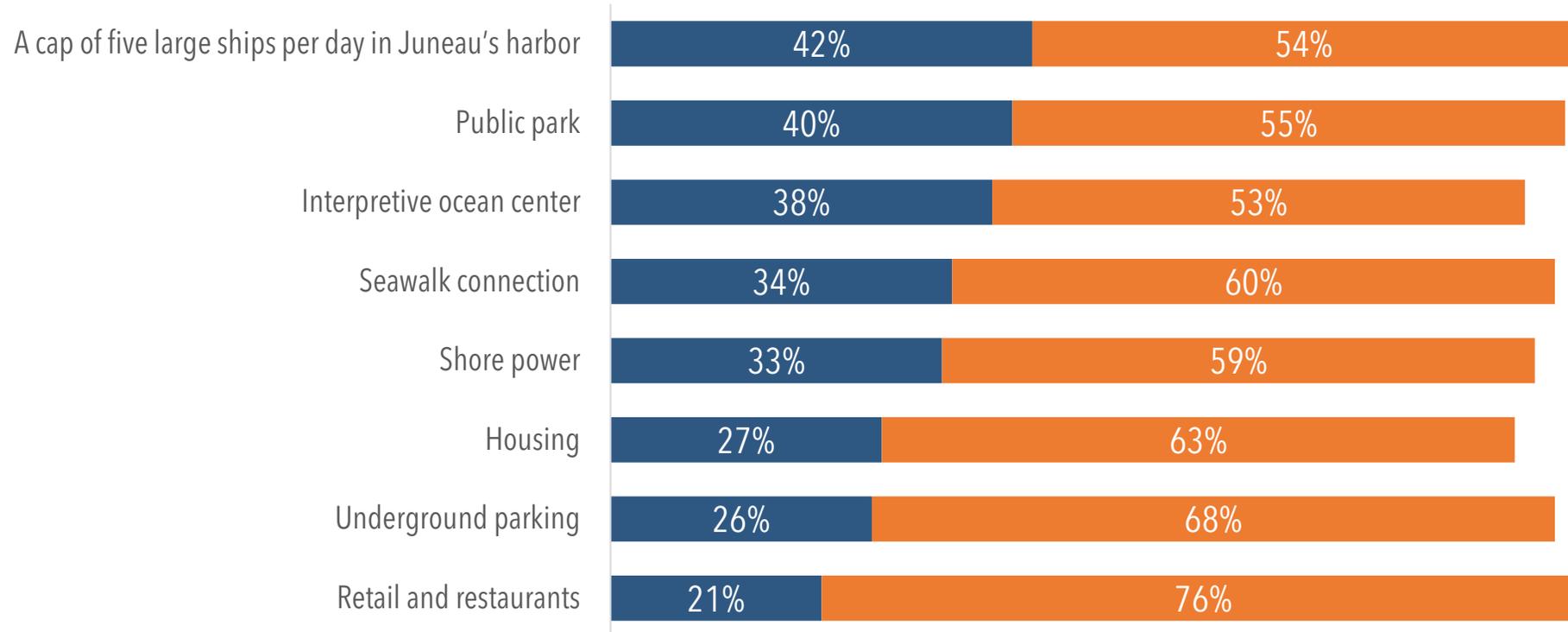
Are you very supportive, supportive, opposed, or very opposed to Norwegian Cruise Line constructing a new cruise ship dock at the subport?



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

Base: Opposed or Very Opposed

■ Yes ■ No



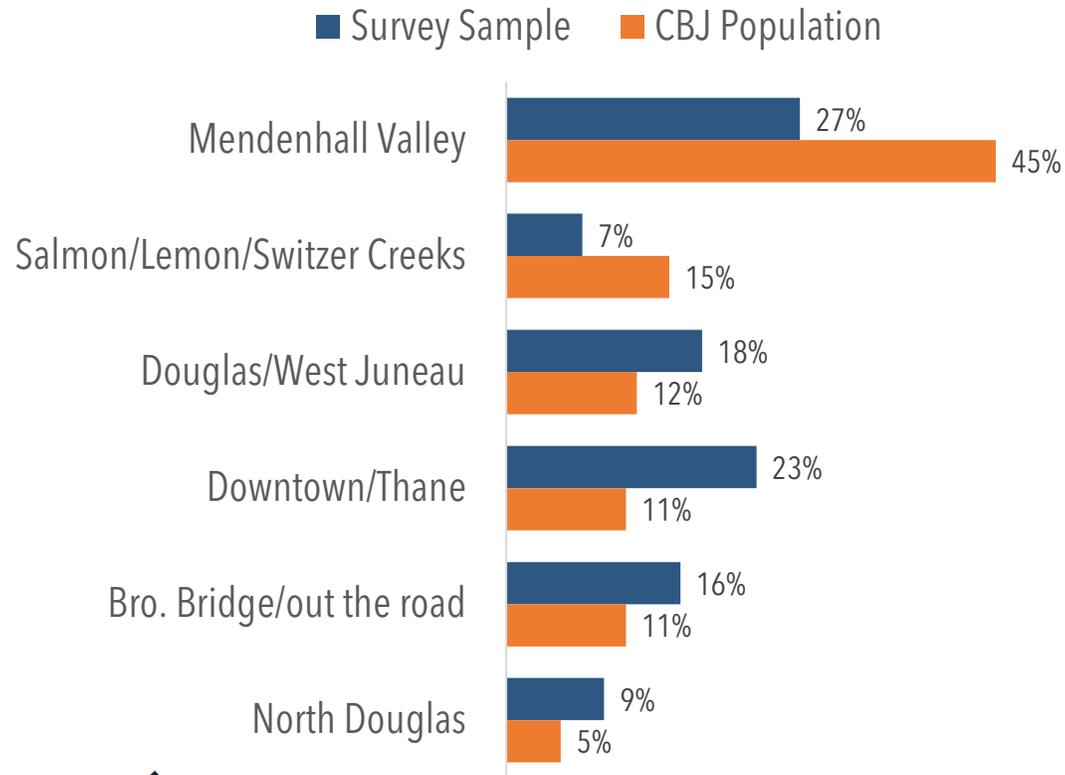
Note: Rows do not add to 100% due to don't know responses.

Online Survey

- Conducted after phone survey
- Open to all members of public (phone survey participants requested to not participate); same screeners as phone survey
- Publicized by CBJ via press release, distribution to neighborhood associations, online announcements, etc.
- 1,924 respondents
- Survey questions mirrored phone survey
- Respondent demographics different from overall population

Online Survey Sample vs. Juneau Population

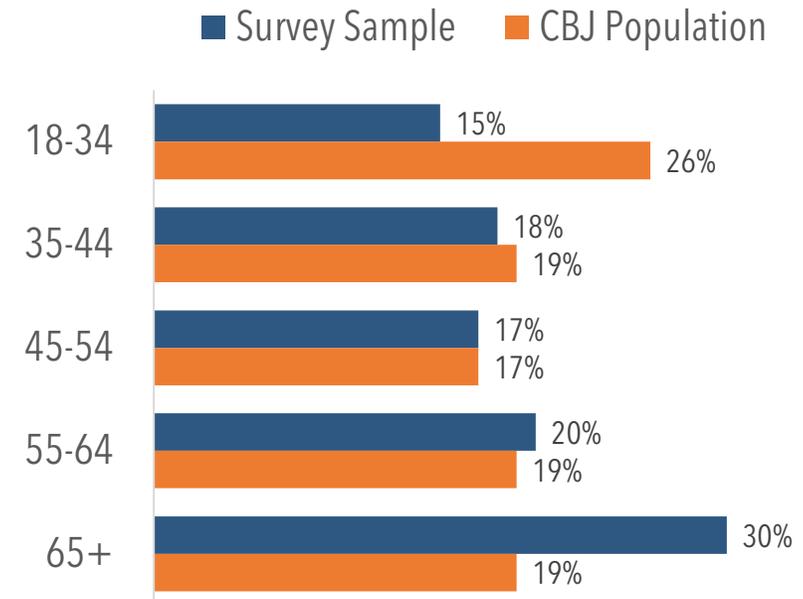
Neighborhood



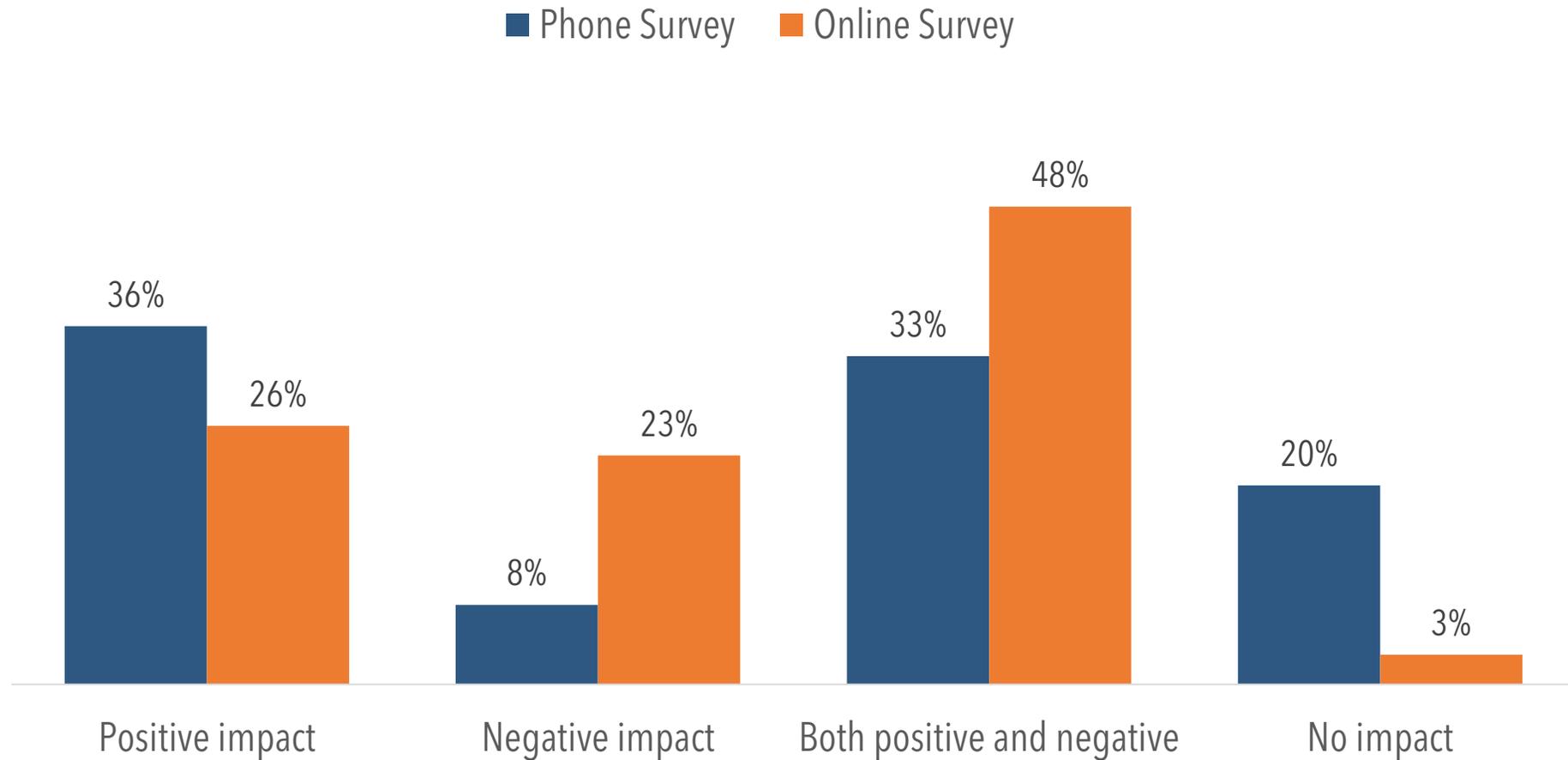
Gender



Age



Online Survey vs. Phone Survey Overall Impacts



Questions



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GROUP, LLC

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A Tale of Three Projects

| | Good Timing | Unfortunate Timing |
|--------------|--------------------|--------------------|
| Scope Driven | DPAC (8) (-23%) | TMHS (2) +21% |
| Cost Driven | MVPL(3) +7% | |

Low Bid as a % Above or Below Estimate
(X) Indicates number of bids received