



## 2013 Business & Legislative Session Visitor Satisfaction Survey Results

Completed by Juneau Economic Development Council

in partnership with The Alaska Committee

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## Executive Summary

The Juneau Economic Development Council (JEDC) partnered with the Alaska Committee to conduct a survey of business and legislative visitors to Juneau in order to measure visitor satisfaction. Results of the survey will be used to determine how to better serve legislative and business visitors to Juneau.

JEDC surveyed 346 people as they were departing Juneau between March and April 2013. The respondents surveyed were limited to visitors whose trip purpose was legislative, Alaska State work, or other business.

While most percentages remain fairly close to those seen in the 2009 survey, it is interesting to note that the percent of Juneau visitors from outside Alaska jumped 12% from 15% in 2009 to 27% in 2013. The number of visitors traveling on private business jumped to 55%, a 23% rise from 2009.

Using a 1-5 scale, respondents were asked about fourteen aspects of their visit to Juneau. The information gathered from these responses was analyzed according to several different demographics including length of trip, age, gender, and geography. On average respondents were satisfied with the overall experience of their visit. Respondents also were pleased with sightseeing, recreation, walking, and the meeting facilities provided in Juneau. Downtown Parking and Airport Concessions were the categories ranked lowest by respondents.

Respondents indicated that they enjoy the beauty/scenery most about their visit to Juneau. Respondents were also impressed with Juneau's people/friendly community and small town feel. The thing respondents least liked about their visit to Juneau is bad weather. Access was the second least liked aspect of visiting Juneau.

Survey takers were given the opportunity to make suggestions about what improvements would make Juneau a better capital city of Alaska. Greater accessibility is the number one suggestion for improving Juneau. Fifteen percent of respondents, who elected to comment in answer to this question, suggested moving the capital as their number one improvement. Improving hotels (9%) and downtown (8%) were also frequently suggested improvements.

The majority of both first-time and return visitors indicated that they find Juneau no more or less appealing as a place to visit and do business than before they visited or compared to their first visit, respectively. More first-time visitors find Juneau a less appealing place to visit, at 18% of respondents, than return-visitors (6%).

## 1.0 Overview

The Juneau Economic Development Council (JEDC) partnered with the Alaska Committee to conduct a survey of business and legislative visitors to Juneau during the first session of the 28th Alaska State Legislature with the following objective:

Measure visitor satisfaction in March and April 2013 to determine how to, in collaboration with community partners, better serve legislative and business visitors to Juneau.

JEDC conducted a similar survey during the legislative session in 2009.

The following report describes (a) the survey methodology JEDC used to measure the satisfaction of legislative and business visitors, (b) detailed results of the survey interviews, and (c) general conclusions considering these results. Appendix 1 includes a comprehensive list of the demographic and trip data that JEDC collected about interviewees along with similar data from the 2009 survey. Appendix 2 presents the aforementioned demographic and trip data (e.g. residency, length of trip) cross-tabulated with average trip aspect scores. Finally, Appendix 3 contains a copy of the survey instrument JEDC used to gather responses.

## 2.0 Methodology

JEDC used an interviewer-based survey methodology to survey visitors to Juneau as they were departing Juneau between mid-March and mid-April 2013 in the departure lounge of the Juneau International Airport. The respondents surveyed were visitors whose trip purpose was legislative, Alaska State work, or other business; visitors with other trip purposes (e.g. personal reasons, vacation) were excluded from the survey. The interviewers surveyed visitors leaving on each of the scheduled Alaska Airline flights at least once but focused on direct flights departing for, first, Anchorage and, second, Seattle.

Based on the number of adult visitors enplaning in Juneau during this time period<sup>1</sup> who were visitors with the relevant trip purposes<sup>2</sup>, JEDC estimated that it needed to survey 346 people from the target population to achieve a 95% confidence level (+/- 5%).

Survey respondents were asked to rate several aspects of their visit to Juneau, to respond to open-ended questions about what they liked most and least about their visit to Juneau and how

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<sup>1</sup> JEDC estimated that 8,000 adult visitors enplaned in Juneau during this time period; about 20,000 total passengers enplaned during this time period.

<sup>2</sup> JEDC estimate that 3,464 adult visitors enplaned in Juneau during this time period whose trip purpose was legislative, Alaska State work, or other business.

Juneau might become a better capital of Alaska, along with various demographic questions. The survey instrument that JEDC administered to this sample of the target population is attached to this report in Appendix 3.

### 3.0 Results

#### 3.1 Trip Aspect Scores

Using a 1-5 scale, respondents—visitors to Juneau whose trip purpose was legislative, Alaska State work, or other business—were asked if they were very satisfied, satisfied, neutral, dissatisfied, or very dissatisfied with several aspects of their visit (5=very satisfied, 1=very dissatisfied). Respondents could also indicate if they did not use specific aspects. A table that shows the average score for each trip aspect is below.

Table 1. Average Score per Trip Aspect

Trip Aspect	Average Score	% Did Not Use
Recreation	4.3	>50
Sightseeing/Attractions	4.3	30 to 40
Overall Juneau Experience	4.2	<10
Walking	4.2	10 to 20
Airport Facilities	4.2	<10
Meeting Facilities	4.0	20 to 30
Arts and Entertainment	4.0	>50
Look and Feel of Downtown Juneau	3.9	<10
Accommodations or Lodging	3.9	<10
Restaurants	3.9	<10
Transportation within Juneau	3.9	10 to 20
Shopping	3.7	40 to 50
Airport Concessions	3.1	10 to 20
Downtown Parking	2.7	40 to 50

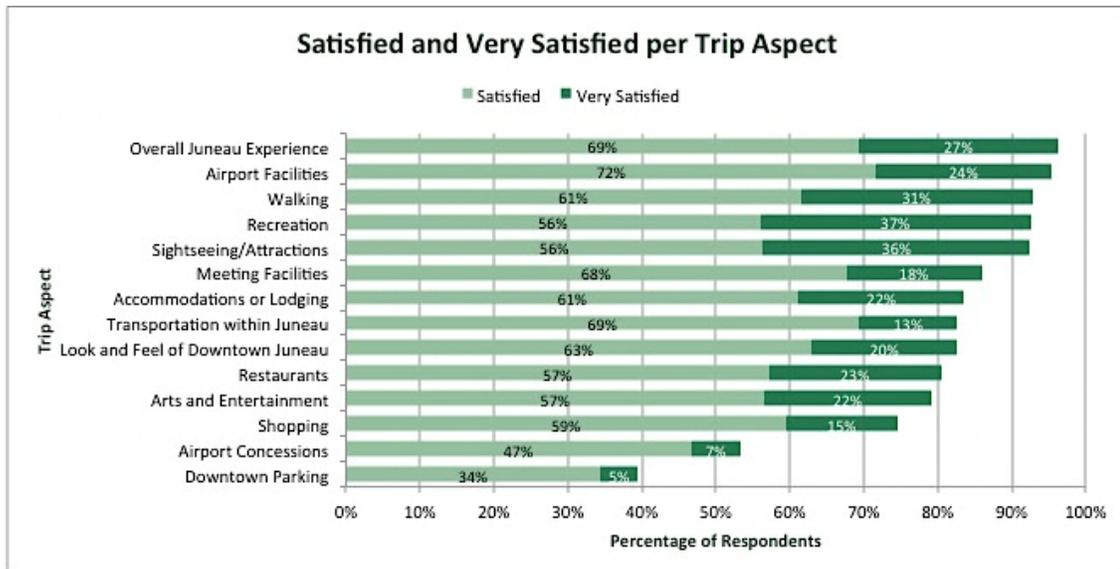
The scores for Recreation, Sightseeing, Overall Juneau Experience, Walking, and Airport Facilities all indicate that, on average, visitors' level of satisfaction with these aspects of their trip to Juneau was between satisfied and very satisfied. Visitors were satisfied with Juneau's Meeting Facilities and Arts and Entertainments. The Look and Feel of Downtown Juneau, Accommodations, Restaurants, Transportation within Juneau, Shopping, and Airport Concessions all received an average score between neutral and satisfied while Downtown Parking was the only trip aspect that visitors ranked between dissatisfied and neutral.

### 3.2 Net Satisfaction vs. Net Dissatisfaction

Net satisfaction is the sum percentage of respondents that scored a trip aspect as satisfied and very satisfied.<sup>3</sup> Likewise, net dissatisfaction is the sum percentage of respondents that scored a trip aspect as dissatisfied and very dissatisfied.

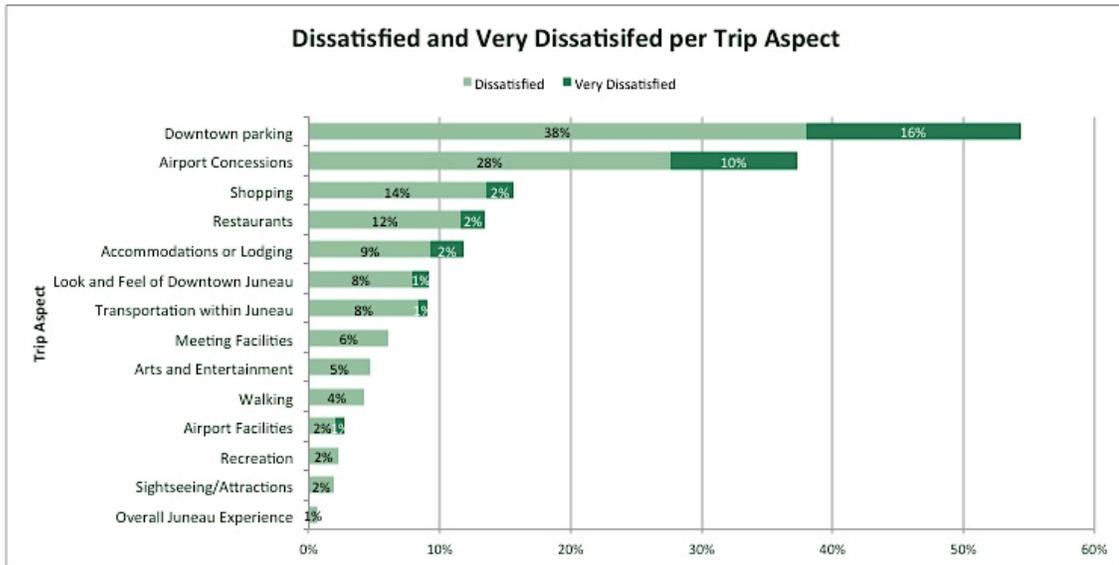
The trip aspect of Overall Juneau Experience had the highest net satisfaction at 96%, followed closely by Airport Facilities at 95%. Recreation had the highest percentage of visitors that indicated they were very satisfied at 37%, followed by Sightseeing (36%), Walking (31%), Overall Juneau Experience (27%), and Airport Facilities (24%). Parking had the highest net dissatisfaction at 54% (higher than in 2009, when it was 51%), followed by Airport Concessions at 37%. Sixteen percent of respondents said they were very dissatisfied with Downtown Parking (down from 26% in 2009) and 10% said they were very dissatisfied with Airport Concessions. Charts 1 and 2, below, display net satisfaction and dissatisfaction, respectively, per aspect of respondents' trips.

Chart 1. Net Satisfaction Per Trip Aspect



<sup>3</sup> Of those respondents that indicated they used a trip aspect

Chart 2. Net Dissatisfaction per Trip Aspect



### 3.2.1 Net Satisfaction vs. Net Dissatisfaction per Trip Purpose of Respondents

Survey respondents were asked to describe the purpose of their trip to Juneau as for (a) Legislative or Session Business, (b) Other State Business, or (c) Other Business. In order to analyze the differences in net satisfaction and dissatisfaction between those respondents whose trip purpose was related to the legislative session and those whose trip purpose was not related to the legislative session, the answers of those respondents that described their trip purpose as either Other State Business (17%) or Other Business (55%) were grouped together (i.e. non-legislative visitors) and compared to those who described their trip purpose as Legislative or Session Business (29%) (i.e. legislative visitors). Overall Juneau Experience had the highest net satisfaction at 96% for both groups. Significant results and differences in terms of net satisfaction between the two groups, per trip aspect, include:

- Walking: 94% net satisfaction (2<sup>nd</sup> overall) for legislative visitors and 77% (4<sup>th</sup> overall) for non-legislative visitors. Walking had the highest percentage of legislative visitors that indicated they were very satisfied at 40%.
- Accommodations and Lodging: 66% net satisfaction (6<sup>th</sup> overall) for legislative visitors and 78% (3<sup>rd</sup> overall) for non-legislative visitors.
- Look and Feel of Downtown: 85% net satisfaction (4<sup>th</sup> overall) for legislative visitors and 73% (6<sup>th</sup> overall) for non-legislative visitors.

Airport Concessions had the highest net dissatisfaction for legislative visitors at 30% (4% very dissatisfied) while Downtown Parking had the highest net dissatisfaction for non-legislative

visitors at 33% (24% of legislative visitors were either dissatisfied or very dissatisfied with Downtown Parking). Other significant results and differences in terms of net dissatisfaction between legislative and non-legislative visitors, per trip aspect, include:

- Shopping: 11% net dissatisfaction (3<sup>rd</sup> overall) for legislative visitors and 7% (7<sup>th</sup> overall) for non-legislative visitors.
- Look and Feel of Downtown: 6% net dissatisfaction (7<sup>th</sup> overall) for legislative visitors and 10% net dissatisfaction (5<sup>th</sup> overall) for non-legislative visitors.
- Walking: 1% net dissatisfaction (12<sup>th</sup> overall) for legislative visitors and 5% net dissatisfaction (8<sup>th</sup> overall) for non-legislative visitors.

Chart 3. Net Satisfaction Per Trip Aspect for Legislative Visitors

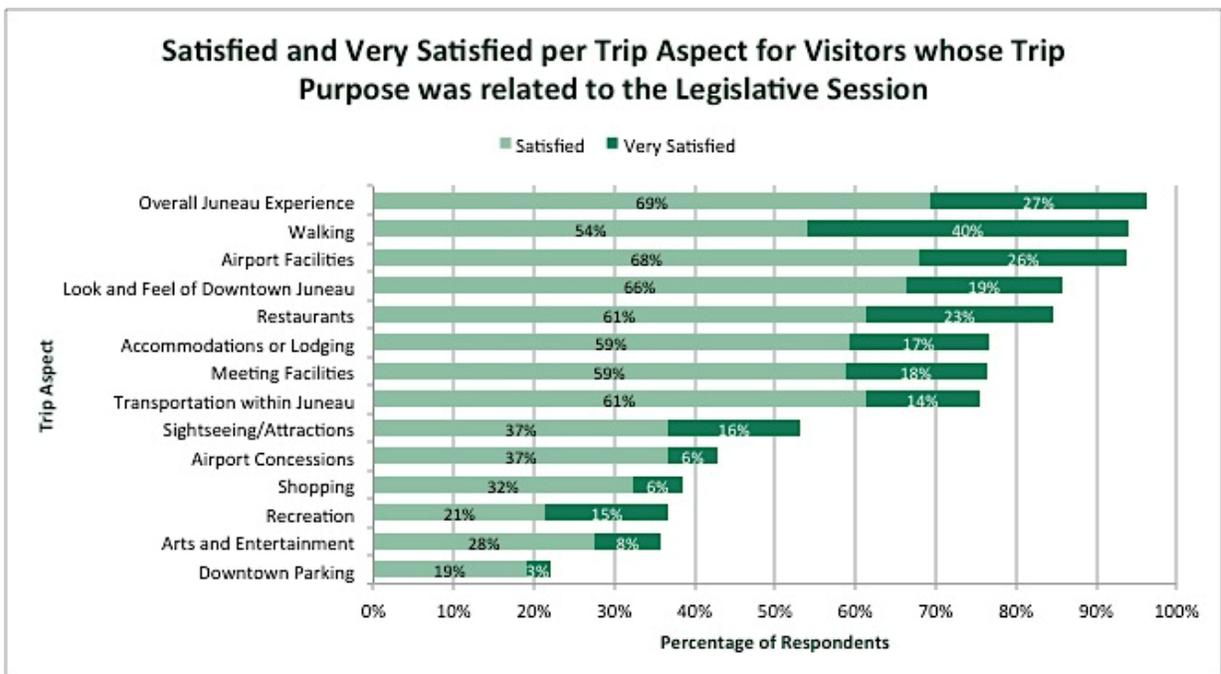


Chart 4. Net Dissatisfaction per Trip Aspect for Legislative Visitors

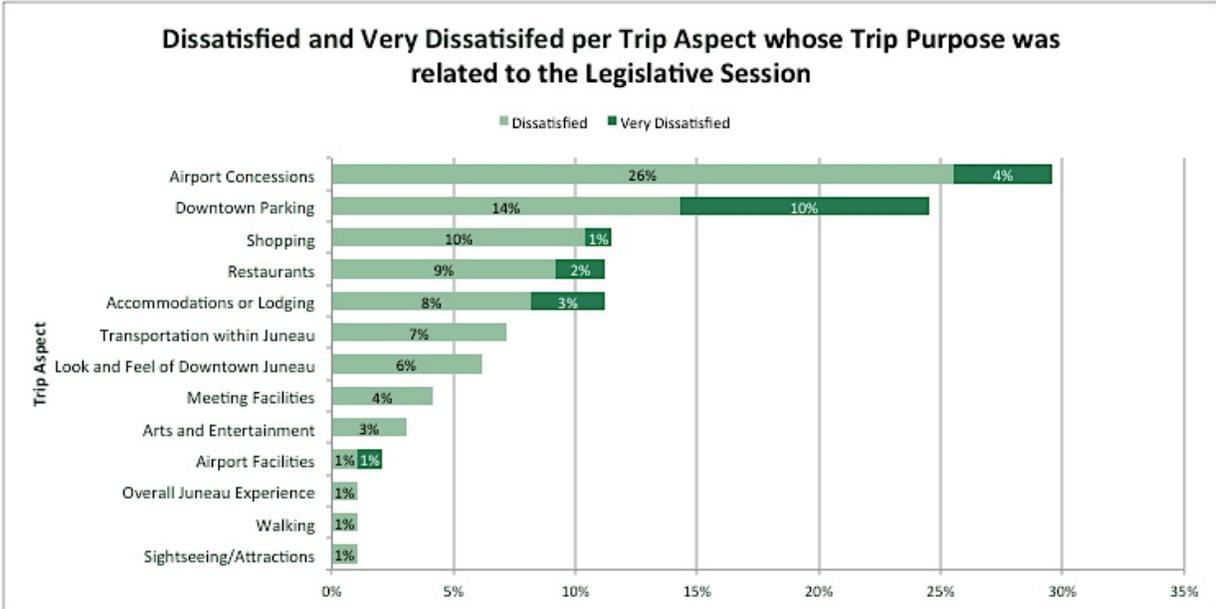


Chart 5. Net Satisfaction Per Trip Aspect for Non-Legislative Visitors

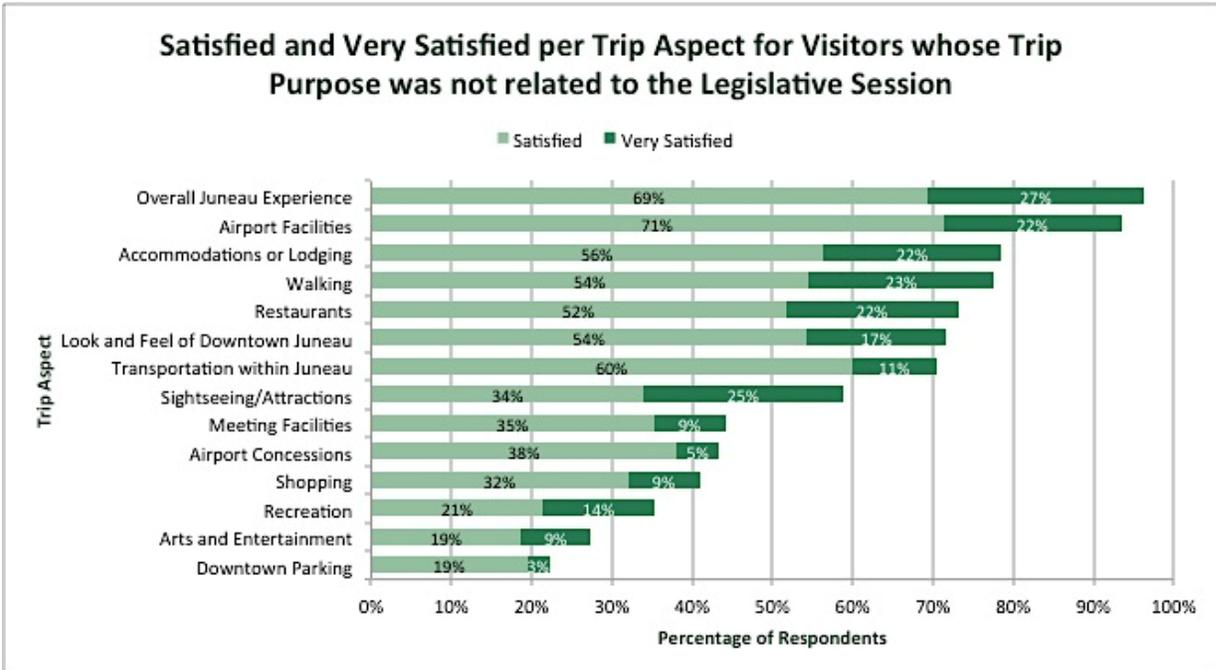
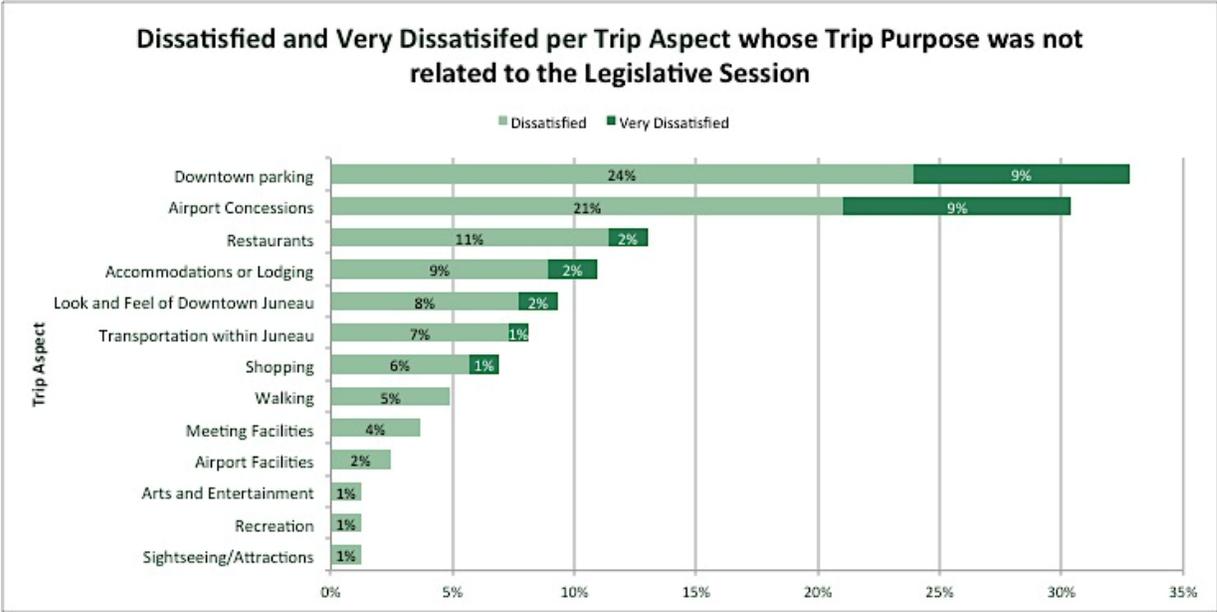


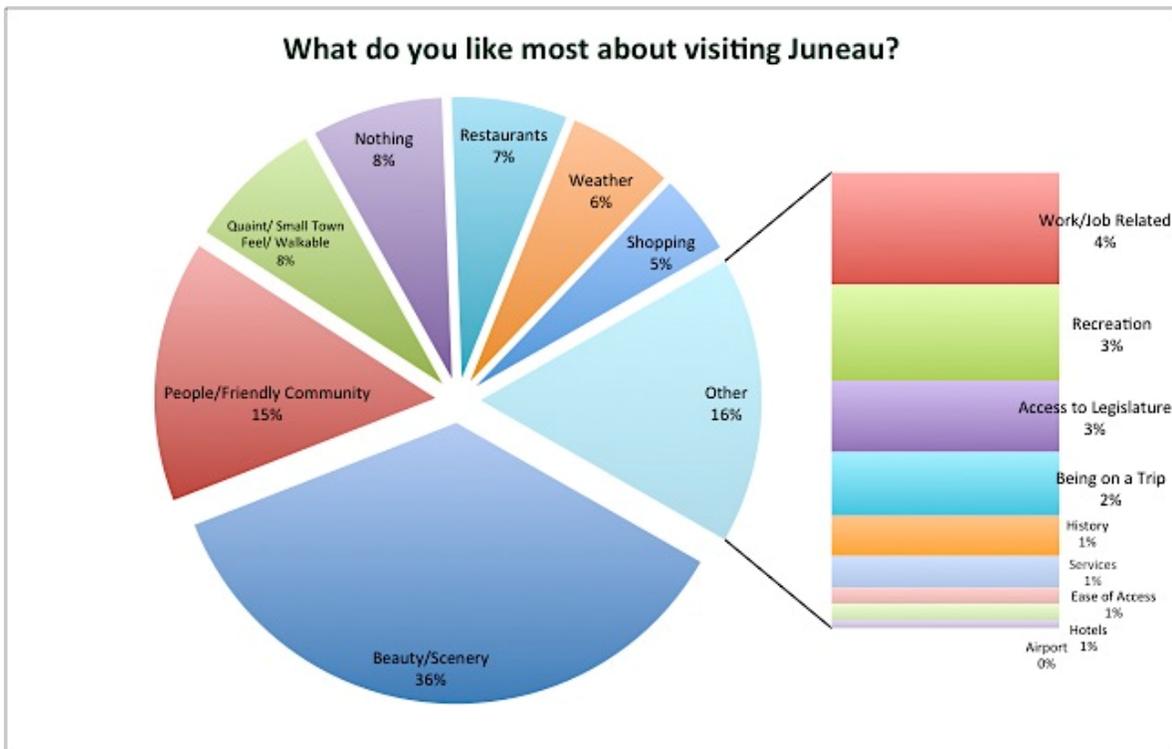
Chart 6. Net Dissatisfaction per Trip Aspect for Non-Legislative Visitors



### 3.4 What Visitors Like Most

When compared to the last survey in 2009, visitors answered the question “What do you like most about visiting Juneau?” with responses that fell into more categories of answers. This year, respondents indicated they liked things that fell into 16 categories, whereas there were 12 categories of responses in 2009. The categories added this year are Nothing (includes no response and “nothing” in a negative response), Access to Legislature, Services, and Airport. Over one in three respondents (36%; 2% higher than in 2009) indicated that Beauty/Scenery was what they liked most about visiting Juneau. As in 2009, the next best represented categories this year were People/Community at 15% (8% lower than in 2009) and Quaint/Small Town Feel/Walkable at 8% (8% lower than in 2009). The categories of Restaurants and Shopping both saw significant increases in the percentage of respondents that said these were their favorite things about visiting Juneau (from 2% in 2009 to 7% in 2013 and from 2% in 2009 to 5% in 2013, respectively). Notable in terms of the categories added this year, 8% of respondents said they liked Nothing most about visiting Juneau and 3% said they liked Access to Legislature.

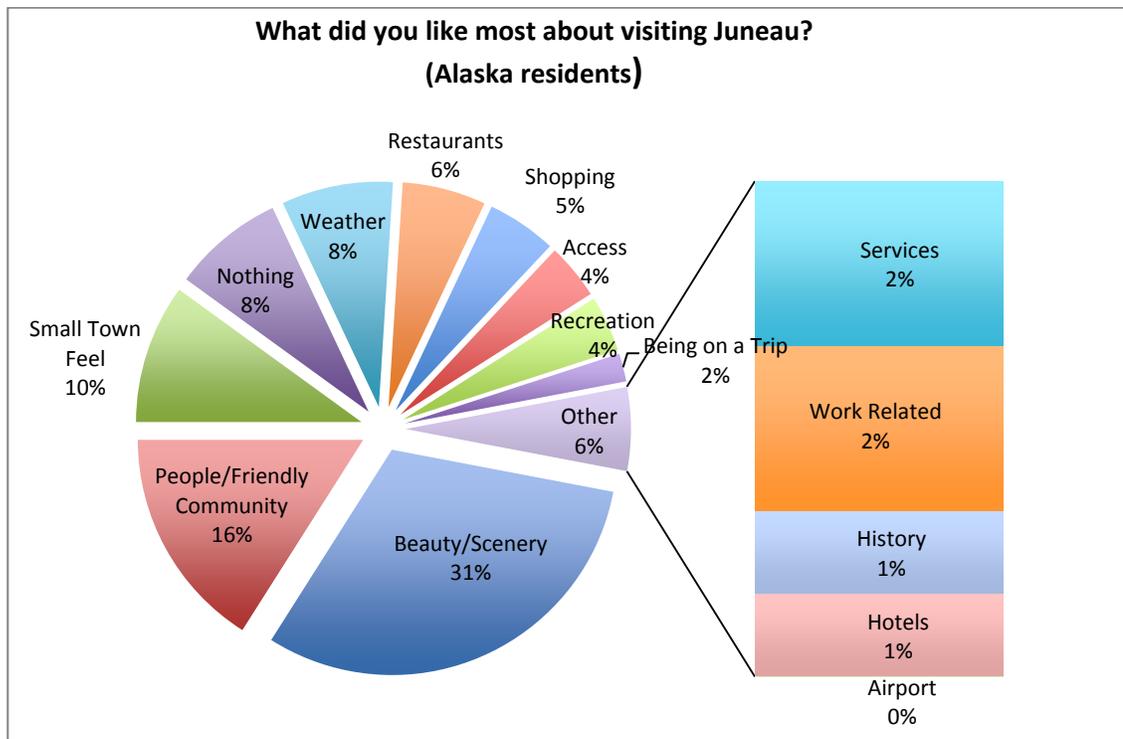
Chart 7. What Visitors Like Most about Juneau



### 3.4.1 What Visitors from Other Parts of Alaska Like Most

Of those respondents who answered the question “What do you like most about visiting Juneau?” 251 were Alaska residents living outside of Juneau. Thirty-one percent of Alaska residents listed Beauty/Scenery as the aspect of their visit to Juneau they liked the most, while 35% of all travelers listed Beauty/Scenery as the most liked aspect of their visit to Juneau. With 16% of Alaska residents selecting People/Friendly Community as their most liked aspect of Juneau, it is the second most popular category. Ten percent of Alaska residents listed Small Town Feel as their favorite aspect of visiting Juneau (2% higher than all travelers). Eight percent of residents listed Nothing, 6% Restaurants, and 5% list Shopping as their most liked element of visiting Juneau; these percentages closely reflect the percentages of all travelers who answered this question. Of note, 8% of Alaska residents listed Weather as their favorite aspect of visiting Juneau, which is 2% higher than all other travelers. Only 2% of AK residents listed Work Related as their favorite aspect of visiting Juneau, opposed to 4% of all other travelers who also listed Work Related as their favorite aspect of their visit.

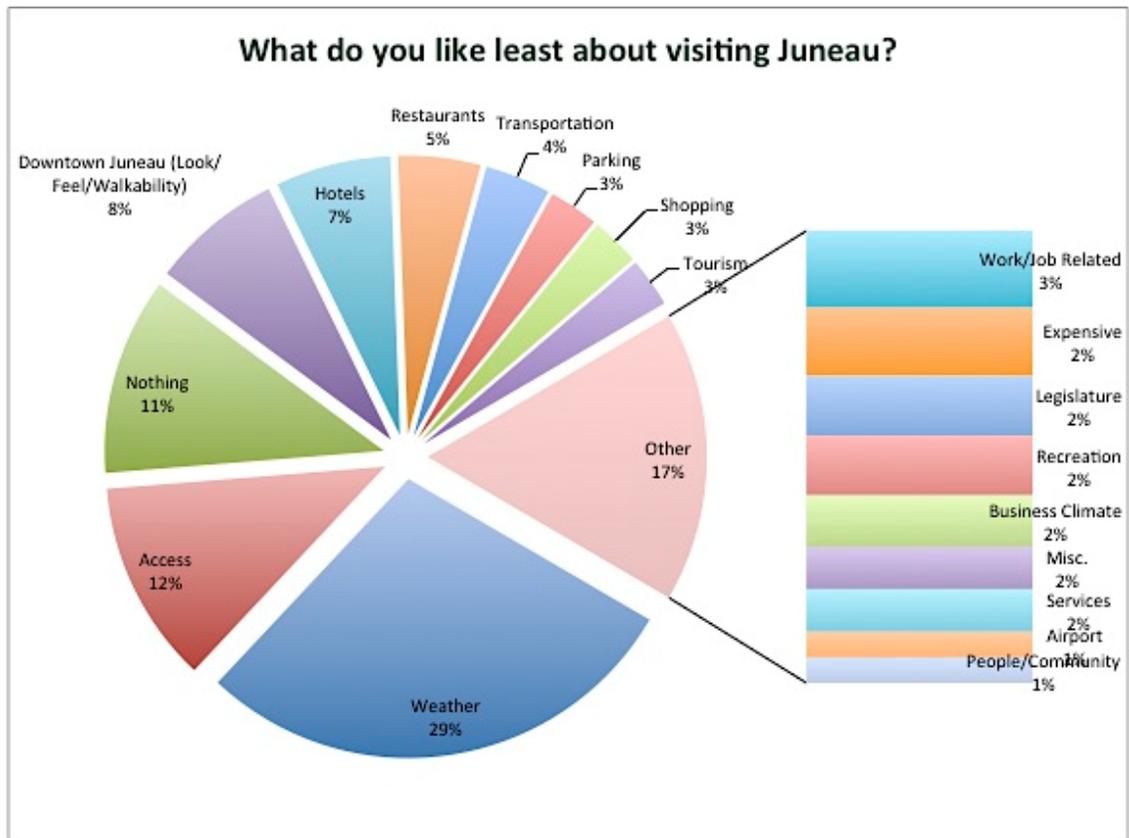
Chart 8. What Visitors from Other Parts of Alaska Like Most about Juneau



### 3.5 What Visitors Like Least

Of those respondents that elected to comment in answer to the question “What do you like least about visiting Juneau?” (31 people did not comment), the highest percentage of respondents reported the weather as what they liked least about visiting Juneau (39% in 2009 and 29% in 2013). Twelve percent said Access was the main aspect they did not like about visiting Juneau (up from 11% in 2009) and 11% that they liked nothing least about visiting Juneau (versus 10% in 2009). Categories that saw a significant increase in the percentage of respondents that identified each as what they like least about visiting Juneau compared to 2009 include Hotels (3% in 2009, 7% in 2013) and the Look/Feel/Walkability of Downtown Juneau (3% in 2009, 8% in 2013). In contrast, categories that saw a significant decrease in the percentage of respondents that identified each as what they liked least about visiting Juneau include Parking (6% in 2009, 3% in 2013) and Work/Job Related (6% in 2009, 3% in 2013).

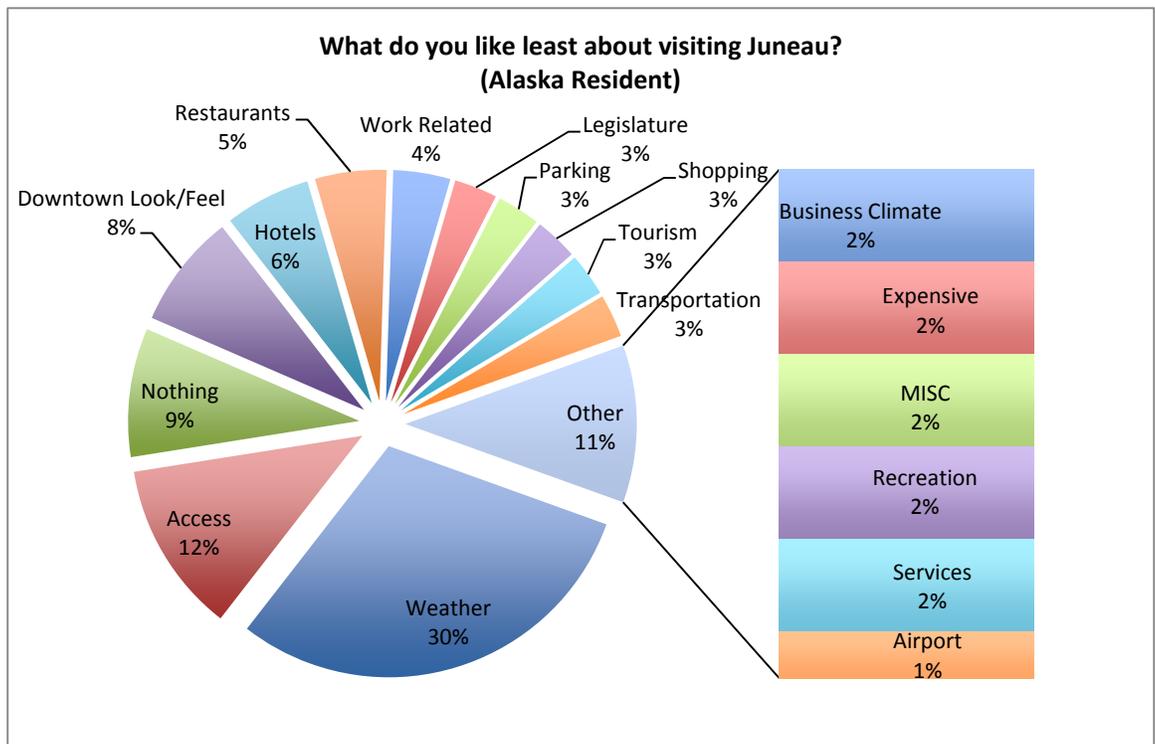
Chart 9. What Visitors Like Least About Juneau



### 3.5.1 What Visitors from Other Parts of Alaska Like Least

Of those respondents who answered the question “What do you like least about visiting Juneau?” 229 respondents were Alaska residents from outside of Juneau. Alaska residents join all travelers in ranking weather as the least liked aspect of visiting Juneau (30%). Twelve percent of Alaska residents listed access as the main thing they liked least about visiting Juneau, which is on par with the all other travelers (also 12%). Nine percent said that they liked Nothing least about visiting Juneau. Alaska residents track with all other travelers in the following categories: Hotels (6%), Look/Feel/Walkability of Downtown Juneau (8%), Restaurants (5%), Parking (3%), Shopping (3%), Transportation (3%) and work related (4%); all of which are within 2 percentage points of responses provided by all other travelers.

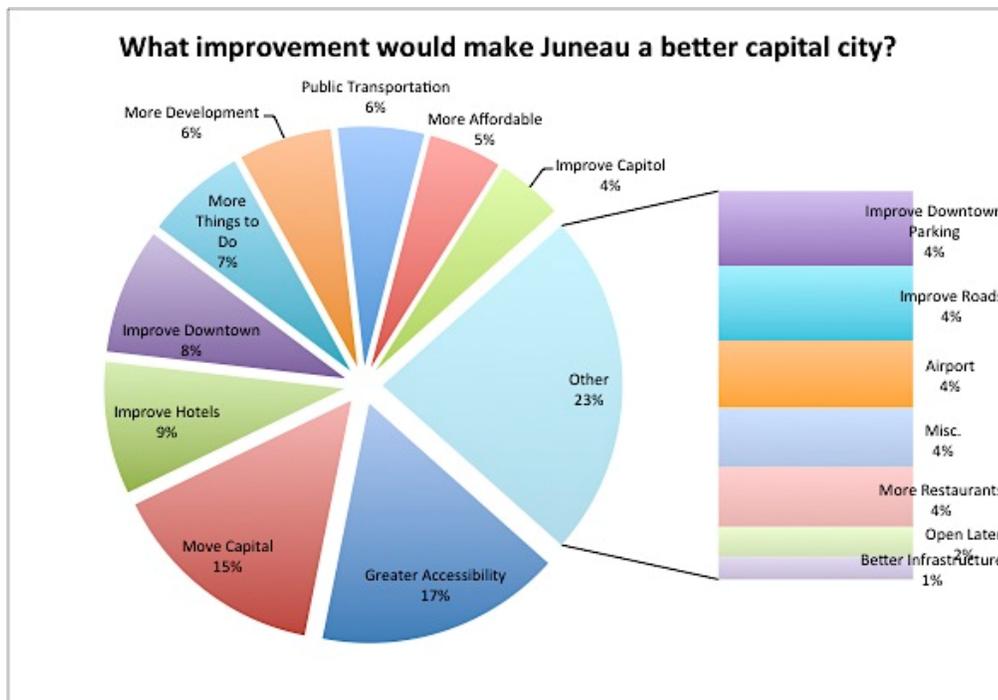
Chart 10. What Visitors from Other Parts of Alaska Like Least about Juneau



### 3.6 What Improvements Might Make Juneau A Better Capital City

The suggestion that the highest percentage of respondents identified as something that might make Juneau a better a capital city was Greater Accessibility (including more flights and a road connecting Juneau with the interior highway system); 17% of respondents suggested Greater Accessibility, which was similar to the result in 2009 when 20% of respondents suggested Greater Accessibility. A similar percentage of respondents (15%) indicated that the capital should be moved to another location in Alaska, a significant increase over the percentage of respondents that proposed this idea in 2009 (6%). Other recommendations that many people voiced included Improve Hotels (9%), Improve Downtown (8%), More things to Do (7%), More Development (6%) (better business climate, more housing, more shops open when not in tourist season), and Public Transportation (6%). The recommendation that saw the greatest decrease in the percentage of respondents endorsing it was Improve Downtown Parking, 17% lower in 2013 (4%) than in 2009 (21%).

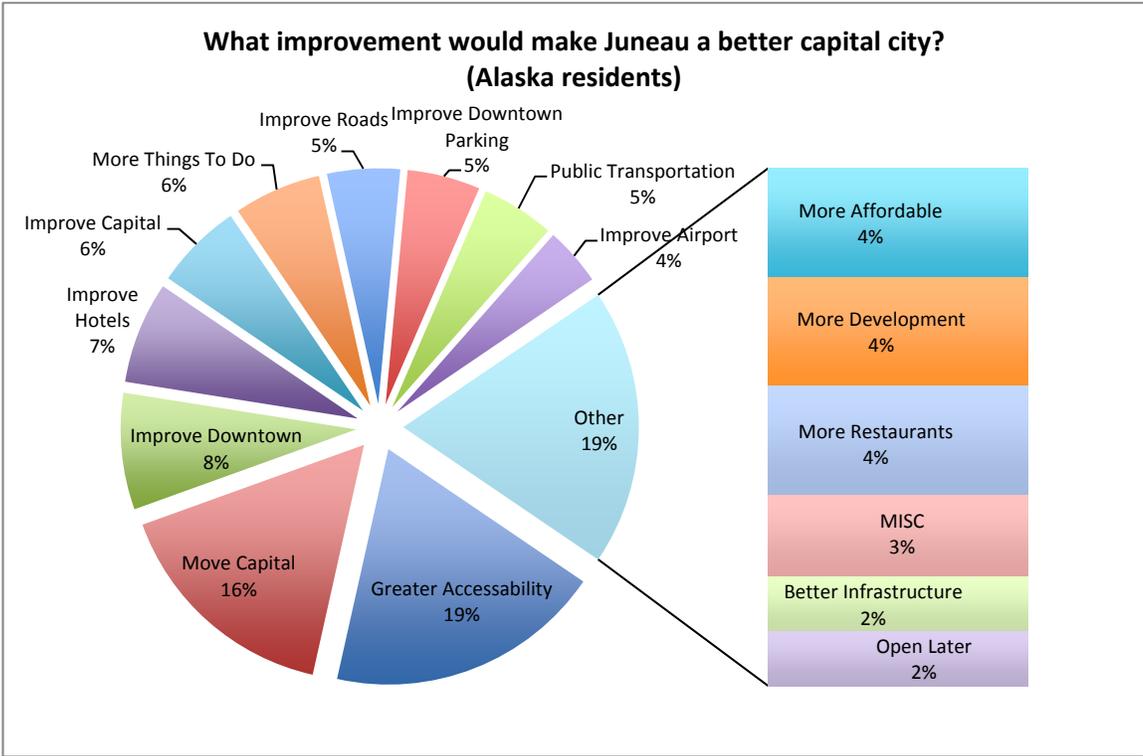
Chart 11. What Improvements Might Make Juneau a Better Capital City



### 3.6.1 What Visitors from Other Parts of Alaska Suggest for Making Juneau A Better Capital City

One hundred seventy-seven Alaska residents commented in response to the question, "what improvement would make Juneau a better capital city?". The leading category was Greater Accessibility; nineteen percent of Alaska residents suggested Greater Accessibility, 2% higher than all other travelers. The second most suggested item was to move the capital, with 16% of responses. Alaska residents' responses are similar to all travelers in the following categories: Improve Downtown (8%), Improve Hotels (7%) Improve Capital (6%), Improve Airport (4%) and More Things to Do (6%). In general, Alaska residents responded in very similar percentages to all other travelers when responding to the question about improving Juneau as a capital city; all Alaska resident responses are within one or two percent of their counterparts answered by all travelers.

Chart 12. What Visitors from Other Parts of Alaska Suggest for Making Juneau a Better Capital City



## 3.7 Is Juneau More or Less Appealing Now

### 3.7.1 Is Juneau More or Less Appealing for First-time Visitors

All 46 first-time visitors to Juneau were asked this question: "Do you find Juneau more or less appealing as a place to visit and do business now compared to the impressions you had before you visited?" The majority of first-time visitors (44%) indicated that their visit had not changed their impression of Juneau either as a more or less appealing place to visit and do business. More first-time visitors found Juneau a more appealing place to visit than found it a less appealing place to visit. Thirty-six percent found Juneau more appealing after their visit, while 18% found Juneau a less appealing place to visit. The respondents who found Juneau a more appealing place after their visit indicated that they found Juneau more appealing because of its scenery, the atmosphere, and the fact that they had a good trip. The respondents who found Juneau less appealing indicated that too many amenities (e.g. restaurants, attractions, shops) in Juneau were closed down. Some respondents stated amenities were closed either too early in the evening or were not open during the non-tourist season. It is interesting to note that none of the 45 first-time visitors who answered this question indicated that they found Juneau a much more appealing or much less appealing place to visit and do business.

Chart 13. Is Juneau More or Less Appealing for First-time Visitors

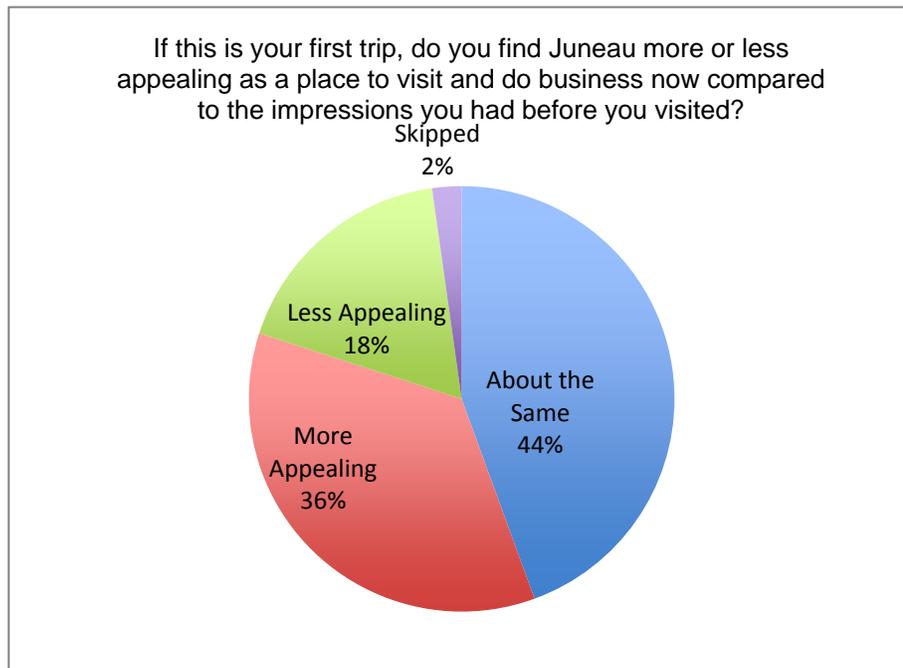


Table 2\*: If your opinion of Juneau as a place to visit and do business changed between now and before you visited, please indicate why (more appealing).

Reason	Rank
Scenery	1
Good Trip	2
Atmosphere	Tied-3
No Expectations	Tied-3
No Comment	Tied-3
Easy to Navigate	Tied-4
People	Tied-4
Size	Tied-4

\*Results based on answers from 15 visitors

Table 3\*\*: If your opinion of Juneau as a place to visit and do business changed between now and before you visited, please indicate why (less appealing).

Reason	Rank
Closed Down	1
Hard to navigate	Tied-2
Restaurants	Tied-2
Scenery	Tied-2
Small	Tied-2

\*\*Results based on answers from 8 visitors

### 3.7.2 Is Juneau More or Less Appealing for Return Visitors

The question: "Do you find Juneau more or less appealing as a place to visit and do business now compared to when you first visited?" was answered by 305 return visitors to Juneau. The majority of respondents indicated that they do not find Juneau any more or less appealing than when they first visited (51%). Thirty-nine percent of return visitors indicated that they find Juneau more appealing than when they first visited. Significantly smaller groups found Juneau less appealing (6%), much more appealing (2%) and much less appealing (1%). The respondents who viewed Juneau as a more appealing place to visit indicated that the reason they find Juneau more appealing is because, in order of frequency of response, they are more familiar with Juneau, Juneau is more developed, there are better amenities, and Juneau is more accessible. The respondents who found Juneau less appealing indicated that they felt this way because Downtown Juneau was not up to their standards, they were bored, Juneau is expensive, and Juneau is isolated.

Chart 14. Is Juneau More or Less Appealing for Return Visitors

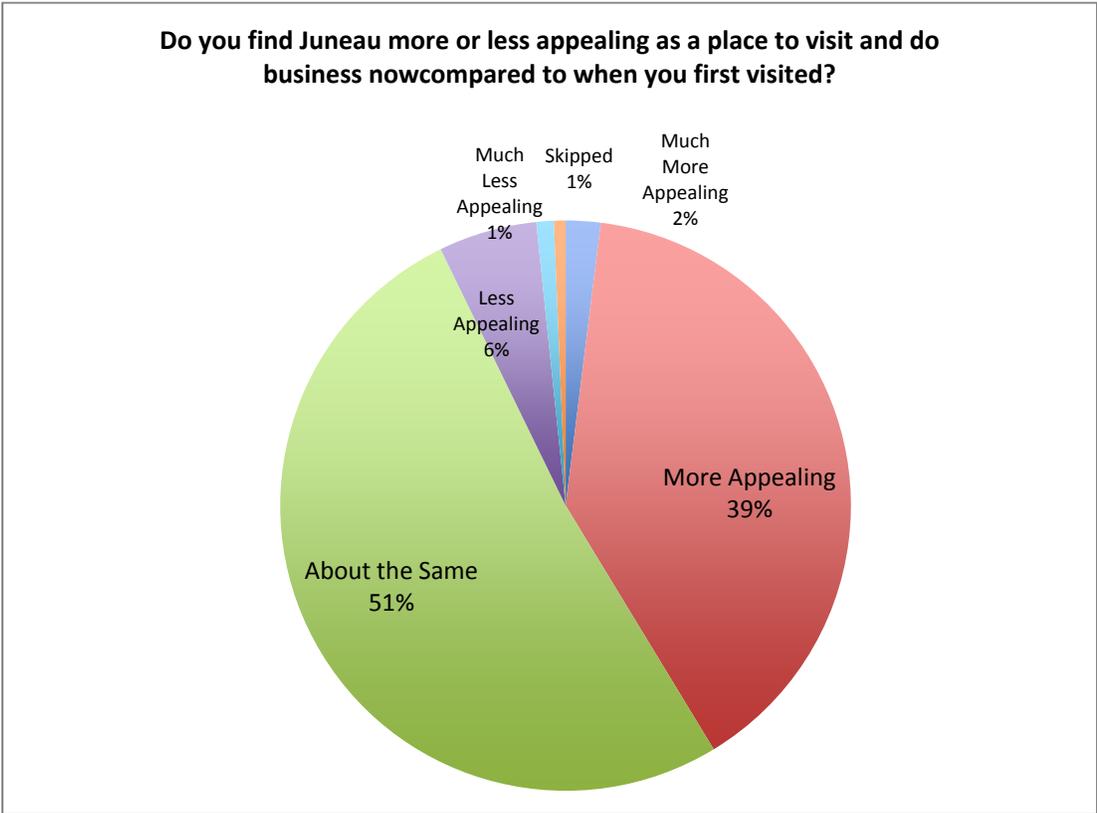


Table 4. If your opinion of Juneau as a place to visit and do business has changed between now and your first visit, please indicate why (more appealing and much more appealing).

Reason	Rank
More familiar	1
More developed	2
Amenities	3
Accessibility	Tied-4
Airport	Tied-4
Downtown	Tied-4
Personal	Tied-4
People	5
Weather	6
Hotels (Accommodation)	7
Roads	7
Scenery	8
No comment	8
Cost	Tied-9
Restaurants	Tied-9
Business opportunities	Tied-9

Table 5. If your opinion of Juneau as a place to visit and do business has changed between now and your first visit, please indicate why (less appealing and much less).

Reason	Rank
Downtown	1
Boring	2
Cost	Tied-3
Isolation	Tied-3
Accommodation	Tied-4
Atmosphere	Tied-4
Government	Tied-4
People	Tied-4
Small	Tied-4
Tourists	Tied-4
Weather	Tied-4

## 4.0 Key Survey Findings

### 4.1 Downtown Parking

Respondents scored downtown parking a 2.7, the lowest score awarded in the 2013 survey. Although a score of 2.7 is virtually identical to the 2009 score (2.8), the percent of respondents who were very dissatisfied with downtown parking dropped from 42% in 2009 to only 16% in 2013. While visitors are less dissatisfied with downtown parking, a score of 2.7 indicates that people are still dissatisfied. This dissatisfaction with downtown parking runs across all demographics and categories surveyed. Complaints indicate that visitors are not satisfied with availability of parking, the condition of parking lots, and confusion as to how parking meters work.

A small percent of respondents (3%) indicated that downtown parking was the aspect of visiting Juneau that they liked the least. Of all survey respondents who answered the question concerning downtown parking, 43% indicated that they did not use downtown parking.

The percentage of respondents who are concerned with improving parking in Juneau has dropped drastically since 2009. In the 2009 survey, improving parking was the number one suggestion to improve Juneau, with 21% of respondents indicating that improving parking would be the best way to improve Juneau. However, in the 2013 survey, the number of respondents who suggested improving downtown parking dropped 17%, with only 4% of respondents listing improving parking. There is no difference in the percentage of respondents who are dissatisfied with downtown parking between respondents who are Alaska residents and respondents who are not.

### 4.2 Airport Facilities

The survey team asked respondents about their level of satisfaction with two aspects related to the airport: airport concessions (beverage and food services, shopping) and airport facilities (apart from concessions).

An average score of 3.1 suggests that, overall, respondents were neutral about the concessions offered at the airport in terms of level of satisfaction. Airport concessions had the second lowest average score of the aspects about which the survey team asked respondents (respondents scored Downtown Parking lower). About 19% of respondents did not use the concessions at the airport. Of those respondents that did use airport concessions, about 53.4% were either satisfied or very satisfied, about 9.3% were neutral, and about 37.5% were either dissatisfied or very dissatisfied. Those that expressed dissatisfaction with airport concessions often pointed to there not being a café after security as the main source of their frustration.

An average score of 4.2 suggests respondents were slightly more than satisfied about the airport facilities. Along with the trip aspects of walking and overall experience, both of which also had average scores of 4.2, airport facilities had the second highest average score of the aspects about

which the survey team asked respondents (recreation and sightseeing both recorded average scores of 4.3). About 2% of respondents said they did not use the airport facilities. Of those respondents that said they did use the airport facilities, about 95.3% were either satisfied or very satisfied, about 2.1% were neutral, and about 2.7% were either dissatisfied or very dissatisfied.

During the last visitor satisfaction survey conducted in 2009, respondents were not asked about their level of satisfaction in regards to the airport facilities and the airport concessions separately; rather, respondents were asked solely about the airport facilities as a whole, which could include the concessions. An average score of 3.7 suggests respondents were slightly less than satisfied with the airport facilities in 2009. Given the results of this year's survey—that is, over 95% satisfaction with airport facilities apart from concessions and a neutral-level of satisfaction with airport concessions—it is likely that dissatisfaction with the airport concessions was the main source of dissatisfaction with the airport facilities in 2009.

### 4.3 Look and Feel of Downtown

With an average score of 3.9 (same as in 2009), respondents were very close to satisfied in regards to the look and feel of downtown Juneau. The look and feel of downtown Juneau had the 9<sup>th</sup> highest net satisfaction of all trip aspects at 83% (63% satisfied, 20% very satisfied), slightly higher than in 2009 (78%). In contrast, this aspect had the 6<sup>th</sup> highest net dissatisfaction at 9% (8% dissatisfied, 1% very dissatisfied), somewhat lower than 2009 (11%). Visitors whose trip purpose was related to the legislative session were slightly more satisfied than non-legislative visitors in terms of the look and feel of downtown (85% versus 73% net satisfaction). Only 6% of legislative visitors were dissatisfied or very dissatisfied with the look and feel of downtown while 10% of non-legislative visitors were dissatisfied or very dissatisfied with the look and feel of downtown.

Although the look and feel of downtown is only one component of it, the quaintness/small town feel of Juneau was the feature of Juneau that visitors ranked third highest (8%) in terms of what they liked most about visiting Juneau (16% in 2009). However, the look and feel of downtown was also the 4<sup>th</sup> most frequently answered aspect of Juneau that visitors cited in response to the question "what do you like least about Juneau?" at 8% of respondents. Improving downtown was also the 4<sup>th</sup> most suggested way in which visitors would improve Juneau, with 8% of respondents proposing this. Indeed, downtown Juneau was the most suggested reason why Juneau was less appealing to return travelers.

In sum, most legislative and business visitors to Juneau have positive feelings about the look and feel of downtown Juneau but some of the results of questions related to this aspect of Juneau indicate that improving the look and feel of downtown should still be a concern.

## 4.4 Accessibility

Accessibility was not an aspect of respondents' visits to Juneau for which the surveyors asked respondents to express their satisfaction. Nonetheless, in response to open-ended questions, visitors frequently cited accessibility issues like access to the Alaska legislature and the ease of getting to Juneau. For example, greater accessibility (e.g. more flights, a road to Juneau) was the most suggested way for improving Juneau as the capital of Alaska with 17% of respondents suggesting this in 2013 (20% in 2009). Also, issues with access was the second most frequently answered response to the question "what do you like least about Juneau?" at 12% of respondents, slightly higher than in 2009 (11%). However, some respondents also mentioned access in a positive light in that 3% said access to the legislature was what they liked most about Juneau, 1% said ease of access to Juneau was what they liked most, and access was the 4<sup>th</sup> ranked reason why return visitors said Juneau was more appealing to them compared to when they first visited.

## 4.5 Hotels

Respondents scored hotels with a 3.9, which is a very slight drop from 2009 (4.0). The score of 3.9 indicates that visitors to Juneau are, in general, satisfied with their accommodations while they are in Juneau. Almost 80% of respondents were either satisfied or very satisfied with their accommodations during their visit to Juneau.

Of the respondents who were not pleased with their accommodations in Juneau the chief complaints were cost and quality of accommodations. Suggestions indicate that Juneau has low-cost, low-quality hotel options and high-cost and high-quality hotel options, but not very many options in the middle. Of the respondents who commented about what they liked least about visiting Juneau, 6% listed accommodations; this is a slight increase from 2009 where 3% of respondents listed accommodations as least liked. Less than 1% of respondents listed accommodations as the most liked aspect of their visit to Juneau. The number of respondents who suggested improving hotels as the best way to improve Juneau jumped from 3% in 2009 to 9% in 2013.

In sum, visitors to Juneau are fairly satisfied with accommodation options in Juneau, but more visitors are concerned about improving hotels this year than in 2009.

## 4.6 Restaurants

The average score for the trip aspect of Restaurants was the same in 2009 and 2013 (3.9). Both net satisfaction (80% in 2009 and 2013) and net dissatisfaction (13% in 2009 and 14% in 2013)

was also very similar in each of these years although the percentage of respondents that stated that they were very satisfied with the restaurants in Juneau decreased from 28% in 2009 to 23% in 2013. Visitors whose trip purpose was related to the legislative session had a higher net satisfaction (84%) regarding restaurants than those visitors whose trip purpose was not related to the legislative session (74%). Legislative visitors were less dissatisfied with restaurants in Juneau in 2013 (11% net dissatisfaction) than in 2009 (16%). Additionally, the percentage of respondents that indicated that restaurants were what they liked most about visiting Juneau was quite a bit higher in 2013 than in 2009 (7% and 2%, respectively). Five percent of visitors said that restaurants were what they liked least about visiting Juneau, about the same as in 2009 (6%).

Visitors made several suggestions for improving Juneau related to restaurants. Four percent wanted to see more restaurants opened and 2% wanted businesses in Juneau, including restaurants, to stay open later (in 2009, 6% of respondents suggested that improved restaurants would help improve Juneau).

In conclusion, the survey results from 2013 imply that visitors are more satisfied with the restaurants than they were in 2009.

## 4.7 Shopping

The average score for shopping in 2013 is 3.7, which is the same score shopping received in 2009. Of all the scores in the 2013 survey, shopping received the third lowest ranking; although 46% of respondents indicated that they did not use shopping facilities in Juneau. The score of 3.7 indicates that visitors to Juneau are between neutral and satisfied with shopping in Juneau. Of those respondents who did use the shopping facilities in Juneau, 75% were satisfied or very satisfied with shopping in Juneau. The remaining 25% of respondents were either, neutral, dissatisfied or very dissatisfied.

A very small number (3%) of visitors who indicated that shopping was the thing they liked least about visiting Juneau. In 2009, only 1% of visitors indicated that shopping was the thing they liked least about visiting Juneau. Legislators gave Shopping a score of 3.1, which indicates they are neutral about shopping in Juneau. City and Tribal workers from small Southeast communities enjoy shopping in Juneau more than other categories or respondents. City and Tribal workers scored shopping in Juneau higher than the average (3.7), with a score of 4.1. Those respondents who enjoy shopping in Juneau generally have a favorite shop. The number of respondents who suggested improving Juneau by keeping shops open later went from 6% in 2009 to only 2% in 2013.

Those respondents, who were not satisfied with shopping in Juneau, indicated that they did not like the fact that shops close early, especially downtown shops. Respondents also indicated that they do not like the fact that shops downtown close during the winter months, after tourist

season has ended. The number of respondents who enjoy shopping most about their trip to Juneau jumped from 2% in 2009 to 5% in 2013. Apart from residents of small Southeast communities, visitors to Juneau do not see Juneau as a place to shop. Those people who do shop in Juneau are, in general, mostly satisfied with their experience.

## Conclusions

Overall, survey results indicate that areas where most dissatisfaction was expressed have improved between 2009 and 2013. Net dissatisfaction in parking, shopping and arts & entertainment has decreased to varying degrees, respectively. Despite somewhat improved results, however, these aspects are still in need of enhancement in the eyes of visitors during the Legislative Season. Parking still scored in the range of "Dissatisfied", shopping and restaurants have been shown to be decreasingly satisfying with additional visits to Juneau, and dissatisfaction with accommodations amongst visitors on legislative business increased 5% between 2009 and 2013. Accessibility, as an aspect that visitors ranked as "liking least" about Juneau, dropped from 20% in 2009 to 17% in 2013. However, "moving the capital" as a response to an open-ended question regarding how to improve Juneau as a capital city increased from 6% in 2009 to 15% in 2013, indicating that accessing Juneau for the legislative season is still a cause of frustration for visitors.

Juneau is improving as a capital city in many aspects, but there is still opportunity for continued growth in parking, shopping, restaurants, accommodations, airport concessions, and arts & entertainment. "Improving Downtown" was the 4<sup>th</sup> most suggested way in which visitors would improve Juneau. Concentrated in the downtown area, and thus in close proximity to the legislature itself, continued development in parking, restaurants, and arts & entertainment is significant to legislator satisfaction, retention, and increased revenues for Downtown Juneau businesses during the legislative season.

Finally, Juneau continues to excel in the overall impression that it leaves on visitors: the natural beauty/scenery, sightseeing, walking, and airport facilities all scored highly (above 4.0). Satisfaction with recreational opportunities increased with additional visits to Juneau, indicating a correlation between familiarity and net satisfaction in this trip aspect. Increasing the rate at which visitors become acquainted with recreational opportunities has the potential to improve overall satisfaction with the Capital City for first-time visitors. These aspects deserve continued attention as strengths where Juneau naturally excels, should be maintained and continually improved upon as it applies to visitors during the legislative season.

## Appendix 1: Demographic and trip data

Age Group	% in 2013	% in 2009
18 to 24	2%	2%
25 to 39	18%	16%
40 to 54	49%	45%
55 to 64	25%	30%
65 or older	6%	7%

Gender	% in 2013	% in 2009
Female	27%	31%
Male	73%	69%

Profession	% in 2013	% in 2009
Legislator	2%	14%
Legislative staff or support position	1%	
Lobbyist	3%	N/A
Other state worker	18%	21%
Federal government worker	6%	10%
City or tribal employee	3%	
Private sector worker	55%	32%
Nonprofit worker	8%	7%
Constituent	1%	2%
University staff	2%	N/A
Other	5%	7%

Primary Trip Purpose	% in 2013	% in 2009
Legislative or session business	29%	36%
Other state business	17%	18%
Other business	55%	46%

Length of Trip	% in 2013	% in 2009
1 day	30%	21%
2 days	23%	27%
3-5 days	30%	27%
6-13 days	9%	8%
2 weeks to 2 months	6%	4%
2 months to 4 months	2%	13%
Over 4 months	0.3%	N/A
Average trip length	6 days	16 days
Median trip length	2 days	3 days

Number of Visits in Last 12 Months	% in 2013	% in 2009
1	20%	21%
2	14%	25%
3	11%	
4	8%	23%
5	8%	
6	8%	
7	2%	
8	2%	
9	1%	
10	3%	
10+	25%	29%

Time Spent in Juneau During Legislative Session	% in 2013	% in 2009
Less than a week (1-6 days)	61%	49%
More than a week, less than a month (7 to 29 days)	22%	23%
More than a month, but not the entire session	8%	28%
Most or all of the session	10%	

Place of Residency	% in 2013	% in 2009
Anchorage	37%	48%
Other South-central	17%	17%
Fairbanks	8%	10%
Southeast	9%	6%
The Rest of Alaska	2%	4%
Outside Alaska	27%	15%

Accommodation	% in 2013	% in 2009
Hotel/Motel	78%	66%
B&B	1%	2%
Rented apartment/condo/room	4%	17%
With friends/relatives	6%	8%
Did not stay overnight	9%	7%
Other (mostly camped)	5%	

Transportation	% in 2013	% in 2009
Rented Car	37%	44%
Taxi	16%	16%
Own Car	5%	14%
Rode With Friends	10%	9%
Borrowed Car	3%	7%
Shuttle	12%	3%
Other:	17%	7%
Walk	10%	N/A
Company Car	3%	N/A
Public Bus	2%	N/A
Government Vehicle	1%	N/A
Other "other"	1%	N/A

## Appendix 2: Demographic and trip data cross-tabulated with trip aspect scores

	Subtotal	Overall Experience	Recreation	Meeting Facilities	Airport Facilities	Arts & Entertainment	Sightseeing & Attractions	Accommodations	Restaurants	Transportation	Look and Feel of Downtown	Shopping	Parking	Walking	Airport Concessions
<b>Residency</b>															
Anchorage	129	4.2	4.2	4.0	4.1	3.8	4.2	4.0	3.8	3.9	3.9	3.4	2.5	4.3	3.3
Other South-central	58	4.3	4.4	3.9	4.2	3.7	4.2	3.8	3.9	3.9	4.0	3.8	2.8	4.3	3.1
Fairbanks	26	4.3	4.2	4.0	4.3	4.3	4.2	4.2	4.0	4.0	4.1	3.4	3.2	4.6	3.4
Southeast	31	4.1	4.0	4.2	4.3	4.1	4.2	4.0	3.7	3.7	3.6	4.1	2.3	3.5	2.6
The Rest of Alaska	6	4.0	4.5	4.2	4.3	5.0	4.3	4.0	4.3	3.8	4.0	4.3	3.3	3.5	1.8
Outside Alaska	94	4.3	4.4	4.0	4.2	4.3	4.4	3.8	3.9	3.9	3.8	3.8	3.1	4.2	3.2
<b>Sector</b>															
Legislator	6	4.2	4.4	4.2	4.4	3.7	4.2	4.0	3.2	3.6	4.2	3.2	3.0	4.5	3.3
Legislative staff or support position	5	4.4	4.6	3.8	4.0	4.3	4.4	3.8	3.2	3.8	4.2	3.4	3.8	4.8	2.6
Lobbyist	9	3.8	4.4	3.8	3.8	3.8	4.3	3.6	3.2	3.7	3.6	3.1	2.0	4.6	2.7
Other state worker	63	4.3	4.5	4.1	4.1	4.0	4.1	3.9	4.0	4.0	4.0	4.0	2.9	4.3	3.2
Federal gov. worker	21	4.1	4.0	3.9	4.0	3.0	4.7	3.9	3.9	4.0	3.5	3.8	2.8	4.0	3.0
City or tribal employee	11	4.2	4.0	4.3	4.1	4.3	3.4	4.0	4.5	4.0	3.7	4.1	2.5	3.5	3.0
Private sector worker	189	4.2	4.3	3.4	4.2	3.9	4.3	4.0	3.8	3.9	4.0	3.7	2.8	4.2	3.2
Nonprofit worker	27	4.3	4.3	4.1	4.2	4.3	4.3	3.8	3.9	3.8	4.0	4.0	2.7	4.1	3.1
Constituent	4	4.3	4.0	4.3	4.3	5.0	4.5	3.5	4.0	4.0	3.5	3.0	1.5	4.0	3.3
University staff	6	4.2	n/a	3.8	4.2	4.0	4.5	4.2	3.8	3.2	4.0	4.0	2.5	3.8	3.0
Other	16	4.5	4.2	3.8	4.0	4.2	3.9	4.2	4.3	3.7	3.8	3.5	2.8	4.2	2.3
<b>Gender</b>															
Female	93	4.3	4.2	3.9	4.0	3.9	4.1	4.1	3.9	4.3	3.9	3.9	2.6	4.2	3.0
Male	253	4.2	4.3	4.0	4.2	4.0	3.7	3.9	3.9	3.9	3.9	3.3	2.8	4.2	3.2
<b>Age</b>															
18 to 24	7	4.3	4.0	4.0	4.2	4.0	4.4	4.6	3.9	4.3	4.3	2.5	3.5	4.3	2.8
25 to 39	63	4.2	4.3	4.0	4.1	4.0	4.3	3.7	3.9	3.8	4.2	3.8	3.1	4.1	2.9
40 to 54	170	4.2	4.3	4.0	4.1	3.9	4.3	3.9	3.9	3.9	3.8	3.4	2.7	4.2	3.2
55 to 64	87	4.3	4.2	4.0	4.2	4.1	4.2	4.0	3.9	3.9	4.0	3.9	2.6	4.3	3.6
65 or older	19	4.5	4.6	3.9	4.4	3.7	4.3	3.8	3.9	3.9	4.2	3.5	2.3	3.7	3.1

	Subtotal	Overall Experience	Recreation	Meeting Facilities	Airport Facilities	Arts & Entertainment	Sightseeing & Attractions	Accommodations	Restaurants	Transportation	Look and Feel of Downtown	Shopping	Parking	Walking	Airport Concessions
Primary Trip Purpose															
Legislative or session business	101	4.2	4.3	4.0	4.2	3.9	4.2	3.8	4.0	3.2	4.0	3.6	2.8	4.3	3.2
Other state business	58	4.3	4.3	4.0	4.2	3.8	4.1	4.0	3.9	4.1	3.9	3.6	2.7	4.2	3.0
Other business	190	4.2	4.2	4.0	4.1	4.1	4.4	4.0	3.8	3.8	3.9	3.9	2.7	4.1	3.2
# of Visits last 12 mos.															
1	60	4.3	3.5	4.1	4.2	3.8	4.4	3.9	4.0	3.9	4.1	4.2	2.1	4.3	3.2
2	43	4.2	4.1	3.9	4.1	3.8	4.3	4.0	3.8	3.6	3.8	3.4	2.3	3.7	3.0
3	33	4.2	4.4	4.0	3.9	4.0	4.3	4.1	4.1	3.9	4.1	3.8	2.9	4.2	3.0
4	24	4.2	4.1	4.3	4.1	4.0	4.4	3.7	3.7	4.1	3.8	3.5	2.1	4.1	3.1
5	24	4.1	4.2	4.1	4.2	3.8	4.1	4.0	3.7	3.7	3.7	3.9	2.5	4.1	3.1
6	23	4.3	3.9	4.0	4.1	4.1	4.2	4.2	4.0	4.0	4.0	3.5	3.3	4.3	3.6
7	5	4.6	4.5	4.0	4.4	4.3	5.0	3.4	4.6	3.8	4.3	4.0	3.3	4.8	3.0
8	6	4.2	4.3	4.0	4.7	4.0	4.0	4.0	3.0	4.2	4.0	3.5	2.3	4.4	3.3
9	3	4.3	n/a	4.0	4.0	n/a	4.0	4.0	3.7	4.0	4.0	4.0	4.0	4.0	4.0
10	7	4.1	4.8	4.0	3.9	4.3	3.7	4.0	3.7	4.0	4.0	3.4	2.0	4.4	3.4
10+	75	4.2	4.4	3.7	4.1	4.0	4.4	3.9	3.7	3.9	4.0	3.5	2.3	4.4	3.0
Time Spent in Juneau During Session															
Less than a week (1-6 days)	211	4.2	4.2	4.1	4.1	4.0	4.3	3.9	4.0	3.8	3.9	4.0	2.8	4.1	3.2
More than week, less than month, 7-29 days	75	4.1	4.1	3.9	4.2	3.7	4.2	4.0	3.9	3.9	3.9	3.6	2.6	4.3	3.0
More than a month, not the entire session	26	4.1	4.5	4.1	4.2	4.1	4.1	3.7	3.4	4.0	3.9	3.4	2.1	4.3	3.2
Most or all of the session	34	4.3	4.5	3.8	4.2	4.0	4.3	3.8	3.7	3.9	4.0	3.5	2.9	4.6	3.2
Length of Trip															
1 day	107	4.2	4.4	4.0	4.2	3.9	4.3	3.9	3.9	3.9	3.9	4.0	2.8	4.1	3.4
2 days	78	4.2	4.0	3.9	4.2	3.8	4.1	3.8	3.9	3.7	4.1	3.7	2.6	4.1	3.0
3-5 days	106	4.3	4.4	4.1	4.3	4.1	4.4	4.0	4.0	3.9	4.0	3.8	2.4	4.3	3.0
6-13 days	31	4.2	4.4	4.1	4.3	3.6	4.2	4.1	3.6	4.0	3.4	3.4	3.3	4.2	3.1
2 weeks to 2 months	20	4.4	4.3	3.9	4.2	4.4	4.2	4.0	3.7	3.9	4.0	3.7	2.9	4.3	3.3
2 mo. to 4 months	6	4.0	4.4	3.2	4.0	4.3	4.0	4.0	3.2	3.4	3.8	3.8	1.3	4.0	2.5
Over 4 months	1	4.0	4.0	n/a	4.0	5.0	4.0	n/a	2.0	4.0	5.0	2.0	4.0	4.0	4.0
Total	346	4.2	4.3	4.0	4.2	4.0	4.3	3.9	3.9	3.9	3.9	3.7	2.7	4.2	3.1