



2018

# JUNEAU BUSINESS VISITOR SATISFACTION SURVEY RESULTS



Completed by the Juneau Economic Development Council in partnership with the Alaska Committee. JEDDC research efforts are supported by core funding from the CBJ.

Fourth Edition: 2018, 2015, 2013, 2009



Edited: September 2018

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## EXECUTIVE SUMMARY

The Juneau Economic Development Council partnered with the Alaska Committee to survey visitors to Juneau during the 30<sup>th</sup> Alaska State legislative session to assess their satisfaction with visiting Juneau and to solicit opinions on improvements to the visitor experience. This survey followed on prior surveys conducted in 2009, 2013, and 2015.

The survey was conducted by staff of the Juneau Economic Development Council (JEDC) in the departure lounge of the Juneau International Airport between February 27, 2018 and April 13, 2018. In total, 495 visitors to Juneau completed the survey. Of these, 354 (72 percent) indicated that their primary purpose for the visit to Juneau was business related. In prior years, visitors to Juneau for purposes other than business-related were not surveyed. New for 2018, all visitors were surveyed. Based on differences in response, three distinct market segments are found: Alaska-resident business visitors, non-Alaskan business visitors, and those visiting for all other purposes. The three segments have different visit purpose, visit length, and choice of lodging and transportation.

Alaskans are most likely to travel to Juneau for legislative or session business, coming from Anchorage or Southcentral. They prefer to stay downtown and walk as their primary mode of transportation. Most will make more than one trip to Juneau and stay one or two days. Non-Alaskan visitors are mostly here for private sector business and are equally likely to stay downtown or in the airport/Valley area. They rent a car and do very little walking. Those here for other than business purposes mostly stay with family or friends and ride with them as the primary means of transportation.

As in prior surveys, visitors continue to express the most satisfaction with the walkability of Juneau's downtown, friendly and efficient service, and airport facilities. Results show that satisfaction with Juneau's hotels has increased both for quality and value for money.

Of significant concern is a decrease in satisfaction with the cleanliness of downtown from prior years, and the appearance for the first time of a concern with the perceived safety of downtown. Results also show a decrease in satisfaction with the transportation to/from the Juneau airport compared to prior years. When asked what would most improve access to Juneau, better transportation within Juneau, including to/from the airport, was a frequent response. The overwhelming request, however, was for more flight options.

In 2018 a satisfaction survey was conducted simultaneously with all elected officials and their staff of the 30<sup>th</sup> Alaska State Legislature. Concerns expressed in that survey were primarily about the perceived safety and cleanliness of Juneau's downtown, consistent with the findings of the 2018 visitor satisfaction survey. Therefore, it is recommended that the Alaska Committee, its community partners, and the City and Borough of Juneau (CBJ) take steps to better understand the causes of these concerns in order to formulate a response and take appropriate mitigating action.

## INTRODUCTION AND METHODOLOGY

The Juneau Economic Development Council partnered with the Alaska Committee to survey visitors to Juneau during the 30<sup>th</sup> Alaska State legislative session to assess their satisfaction with visiting Juneau and to solicit opinions on improvements to the visitor experience. This survey followed on prior surveys conducted in 2009, 2013, and 2015.

The 2018 Juneau Visitor Satisfaction Survey is a modified version of the template developed for the 2015 survey. The 2018 survey was revised by JEDC with input from members of the Alaska Committee, Travel Juneau, and the Juneau Chamber of Commerce. The survey consisted of 24 questions, some multiple choice, some based on a rating scale and some open response. Respondents were asked about their visit purpose and length, their accommodation and transportation choices, their satisfaction with aspects of downtown Juneau, hospitality and recreation, and airport services. The survey also solicited opinions on how to improve parking, how to improve access to Juneau, and how to improve Juneau as a capital city.

Between February 27, 2018 and April 13, 2018, JEDC staff were allowed into the departure lounge of the Juneau International Airport by special arrangement with the airport management and the generous assistance of Alaska Airlines, who provided daily gate passes to the JEDC staff. Passengers waiting for departing flights on Alaska Airlines were asked to take the survey in paper form. The survey was only given to passengers who were visiting Juneau from out of town. Responses were subsequently entered by JEDC staff into SurveyMonkey, the online survey development and analysis tool also used in 2015.

In total, 495 visitors completed the survey. Of these, 354 indicated that their primary purpose for the visit to Juneau was business related. U.S. Department of Transportation, Bureau of Transportation statistics were used to determine the statistical validity of results. According to the government data, 32,245 passengers enplaned at the Juneau International Airport during this same period in 2017. JEDC estimates that 85 percent (27,400) were adults and 50 percent (13,700) were not residents of Juneau. With these assumptions, the overall sample size of 495 responses reflects the target population with a margin of error of 4.32 percent while the business visitor subset of 354 responses provides a 5.17 percent margin of error at a 95 percent confidence level.

In 2018, a separate satisfaction survey was distributed to elected officials and staff of the 30<sup>th</sup> Alaska State Legislature and results are compared, where applicable.

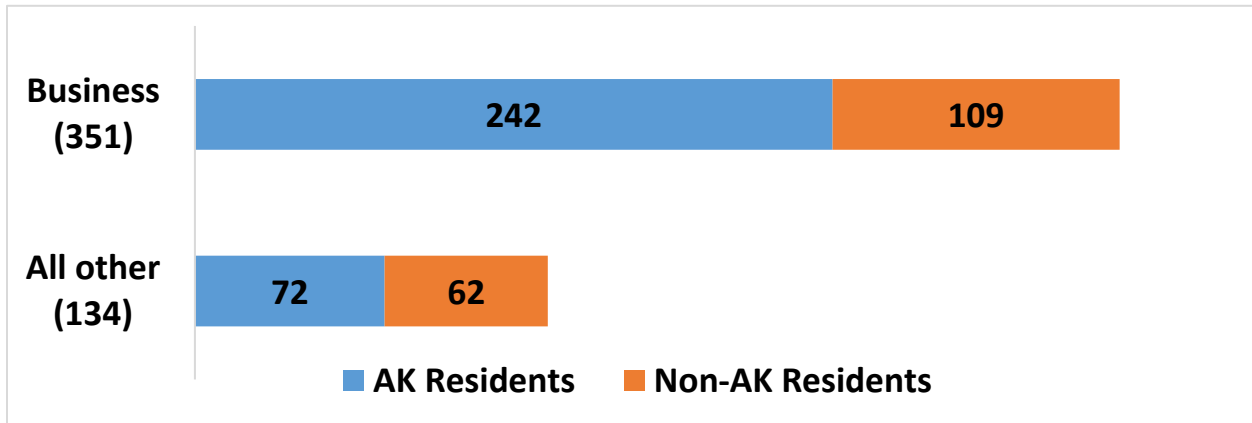
## FINDINGS

### Visitor Characteristics

New to the 2018 survey, visitors to Juneau were not pre-screened to capture responses only from business travelers. All passengers in the departure area who indicated that they had just completed a visit to Juneau were surveyed. Overall, 72 percent of respondents were here for

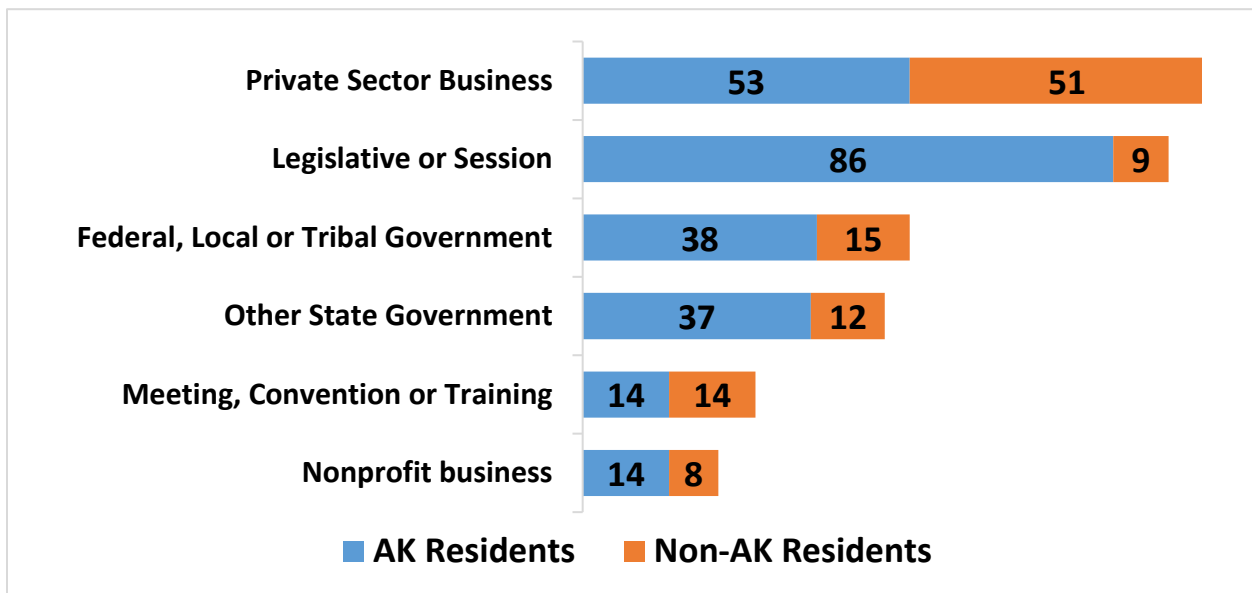
business purposes and 28 percent were here for personal reasons, such as visiting family or friends, medical, or temporary employment. Among business visitors, 69 percent were Alaska residents and 31 percent were from out-of-state. Among respondents visiting for non-business purposes, 54 percent were Alaska residents.

*Figure 1: What was your primary purpose for this visit to Juneau?*



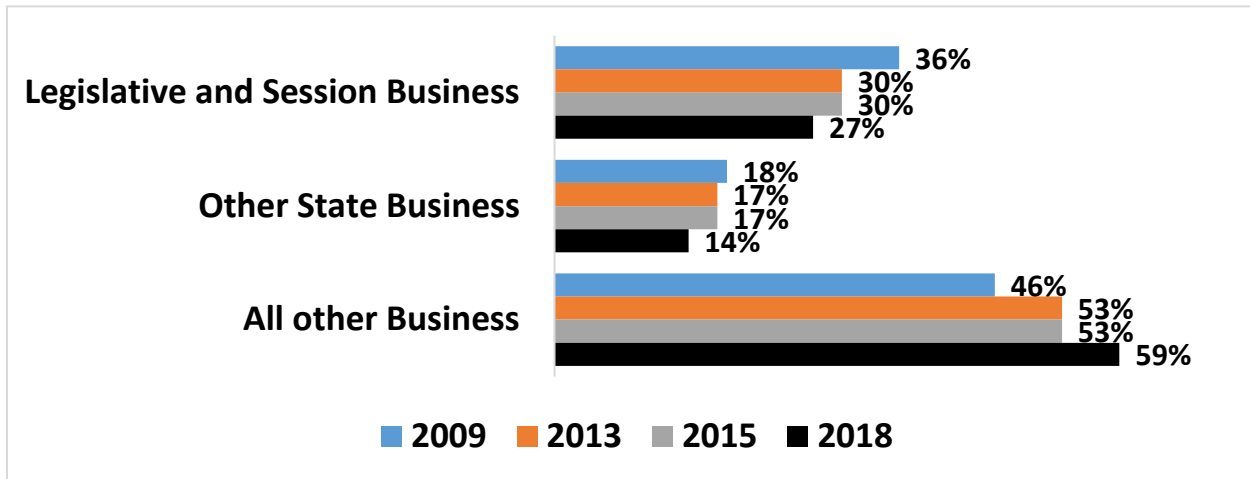
Respondents visiting for business purposes fell into two distinct groups. Over one third of Alaska residents visited for legislative or session or other government business purposes, the largest single category. The number of Alaskans and non-Alaskans here primarily for private sector business, were about the same, but this represented the largest single category of non-Alaskan respondents.

*Figure 2: What was your primary business purpose for this visit to Juneau?*



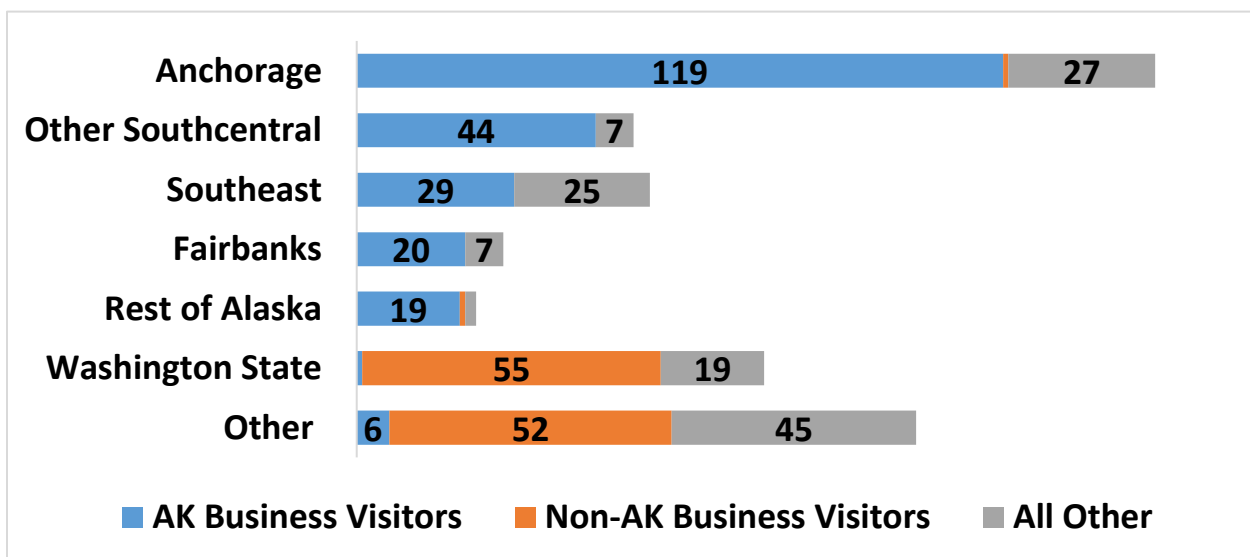
The shift in trip purpose already seen in the 2009, 2013 and 2015 surveys, appears to continue for the current legislative session. The number of visitors traveling here for legislative and session business has decreased while the number of visitors coming to Juneau for other business has increased. Federal, local and tribal business visitors are included in all other business in the chart below to be consistent with the 2009, 2013 and 2015 analysis.

Figure 3: 2018 Business Purpose Compared to 2015, 2013 and 2009



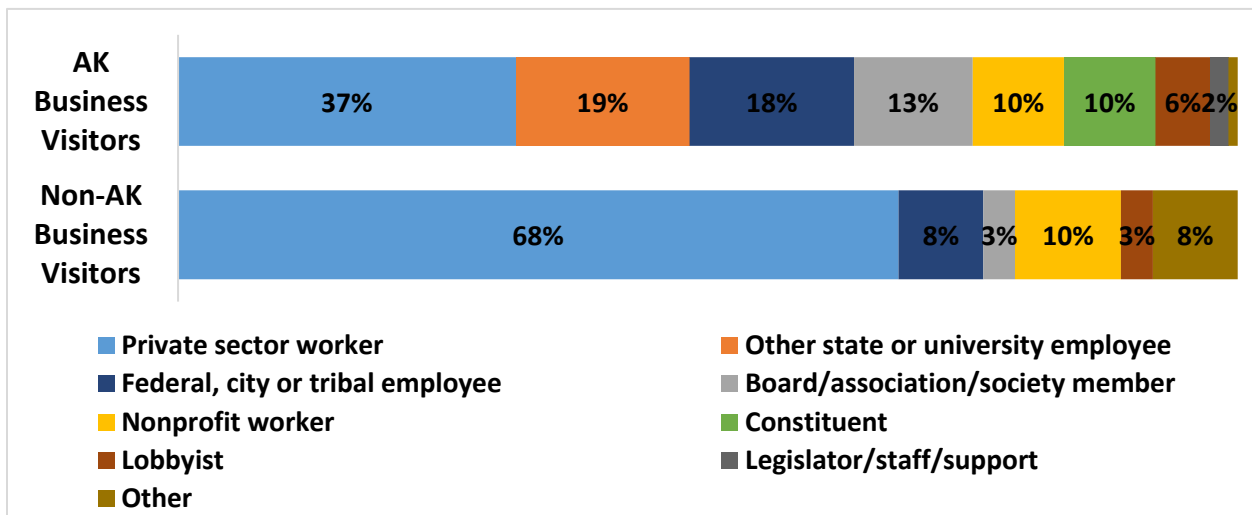
Sixty-four percent of survey respondents lived in Alaska. The greatest number were Alaska residents living in Anchorage (31 percent of all respondents). Of respondents who did not live in Alaska, most lived in Washington state. While most of those residing in Alaska and residing outside of Alaska were visiting Juneau on business, (77 percent) and (60 percent) respectively, the percent living out of state and visiting for other reasons (40 percent) was significantly greater than the percent of Alaska residents visiting for other reasons (33 percent).

Figure 4: Where Do You Reside?



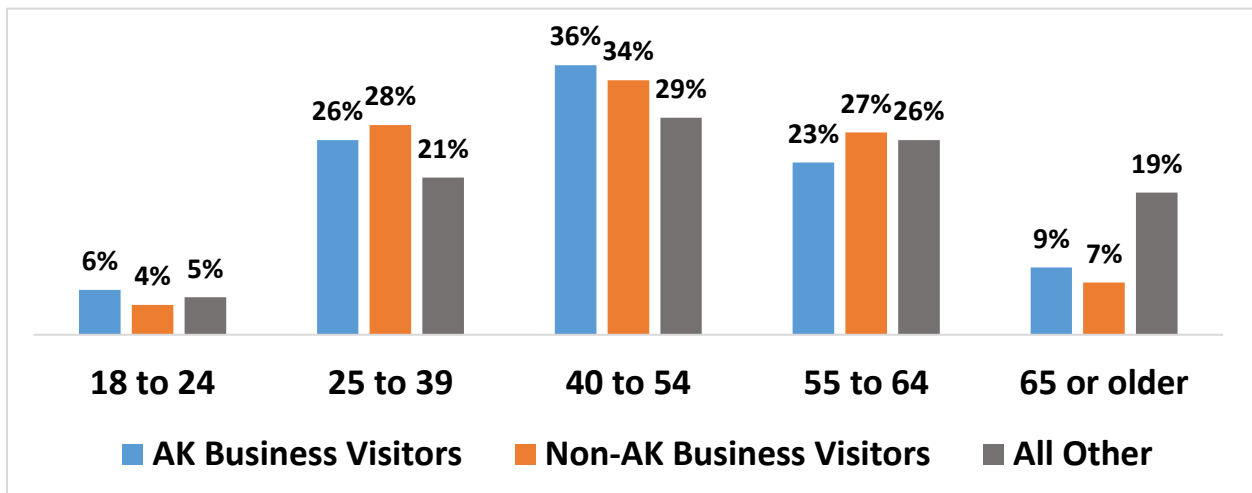
Alaska residents and non-Alaska residents visiting Juneau for business represent distinctly different employment sectors. More than two thirds of non-Alaskan business visitors (68 percent) identified themselves as private sector workers, compared to only 37 percent of Alaskan business visitors. Another 37 percent of Alaskan business visitors identified themselves as government employees (other state, federal, city or tribal) compared to only 8 percent of non-Alaskans.

Figure 5: Which Occupation Best Describes You?



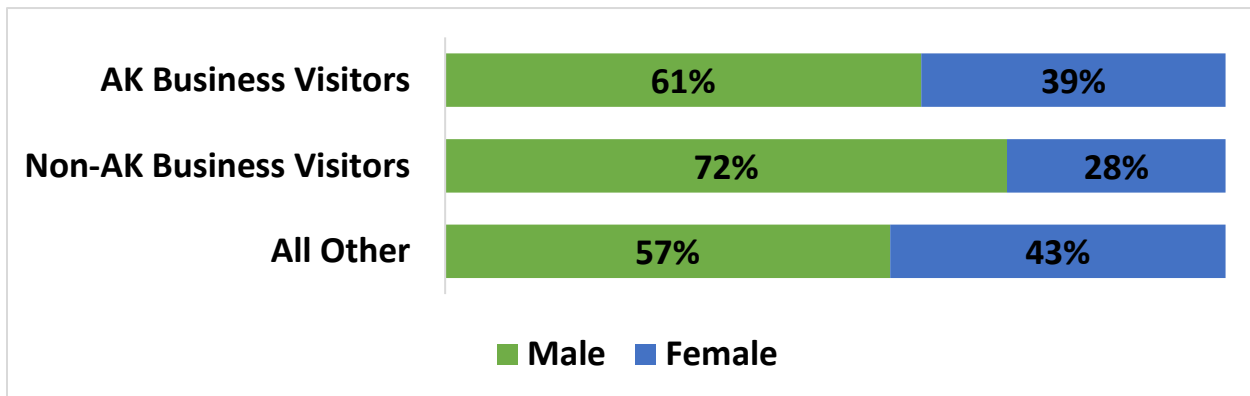
Survey respondents who are business visitors to Juneau were younger than those here for non-business-related visits. While 62 percent of respondents visiting for business are between the ages of 25 and 54, only 50 percent of non-business travelers are in this age demographic. In addition, while only 9 percent of business visitors are 65 or over, 19 percent of all other visitors fall in this demographic.

Figure 6: Which Age Range Describes You?



Finally, 62 percent of all business and nonbusiness visit respondents were men and 38 percent were women. Again, differences emerged by residence and visit purpose. While 61 percent of all Alaskan business respondents were men, non-Alaskan business visitors were more predominantly male (72 percent). Those visiting for a non-business-related purpose were closest to being evenly split, at 43 percent women and 57 percent men.

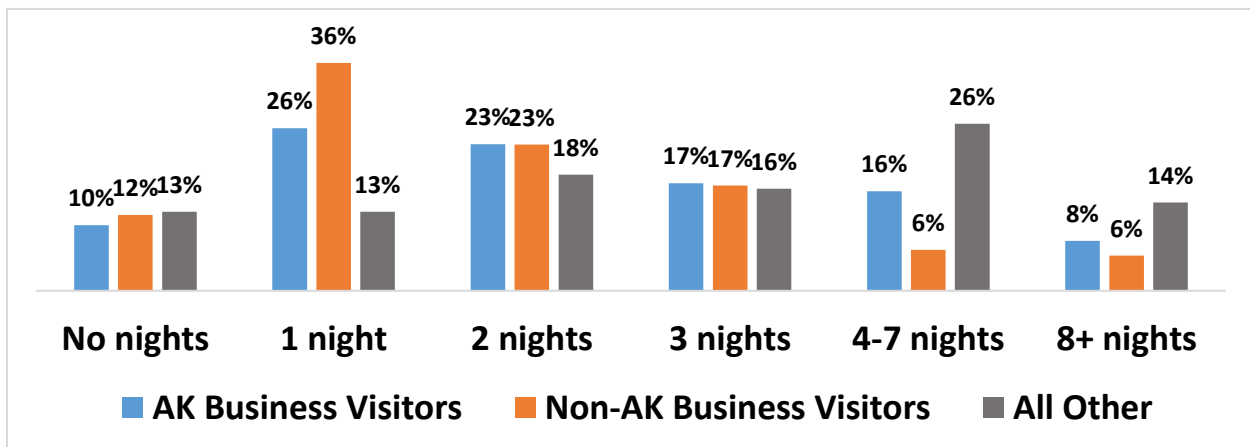
Figure 7: Gender



### Visit Characteristics

In 2018, 89 percent of all business visit respondents stayed overnight in Juneau, almost half (52 percent) staying only one or two nights. Differences emerged again between Alaskan and non-Alaskan visitors, where 36 percent of non-Alaskan business visitors stayed for only one night compared to 26 percent of Alaskan business visitors, who were almost as likely to spend two nights (23 percent). Respondents who were visiting for purposes other than business stayed longer than business visitors, 40 percent staying 4 or more nights.

Figure 8: How Many Nights Did You Stay in Juneau? (Percent of mentions by group)

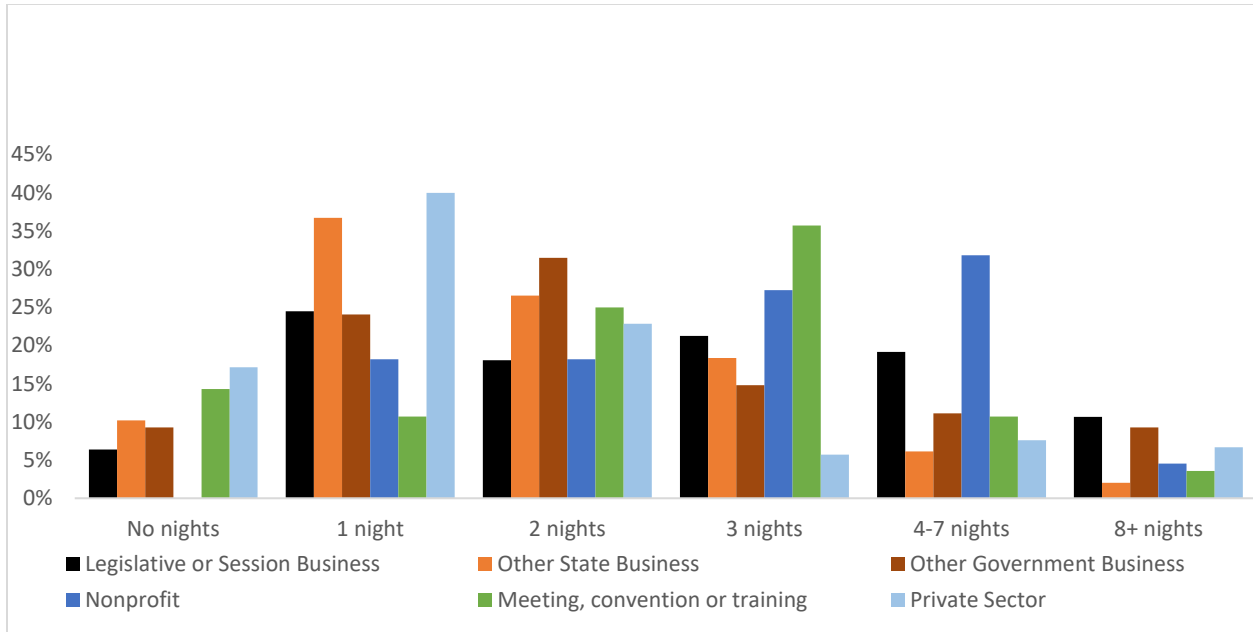


When looking at number of nights spent in Juneau for business purpose, respondents visiting on other state business and those visiting for private sector business were the most likely to stay



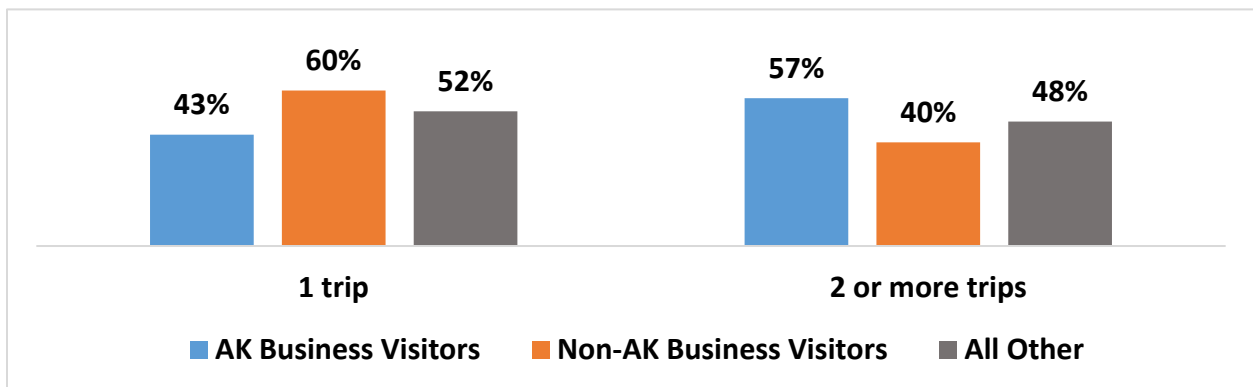
only one night. Those here for other government business were most likely to stay two nights; those here for a convention, meeting or training, and for nonprofit business were most likely to stay more than two nights.

*Figure 9: How Many Nights Did You Stay in Juneau (for business purposes)?*



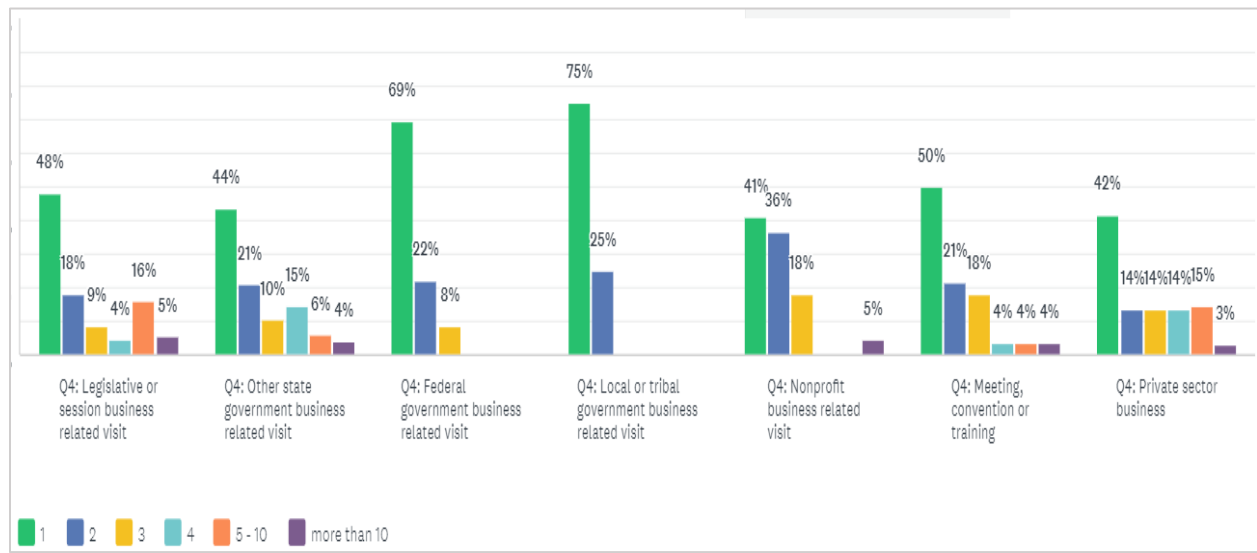
Respondents were asked about the number of trips to Juneau they planned during the current legislative session. More than half of Alaska residents traveling for business (57 percent) were likely to visit two or more times during the session. As discussed above, this group also was more likely to spend several nights in Juneau during their visit, in addition to visiting more often. In contrast, almost two thirds of non-Alaskans visiting for business (65 percent) expected to make only one trip to Juneau and just over half (52 percent) of visitors for purposes other than business planned only one visit.

*Figure 10: Approximately how many trips will you make to Juneau from January 15, 2018 to April 15, 2018?*



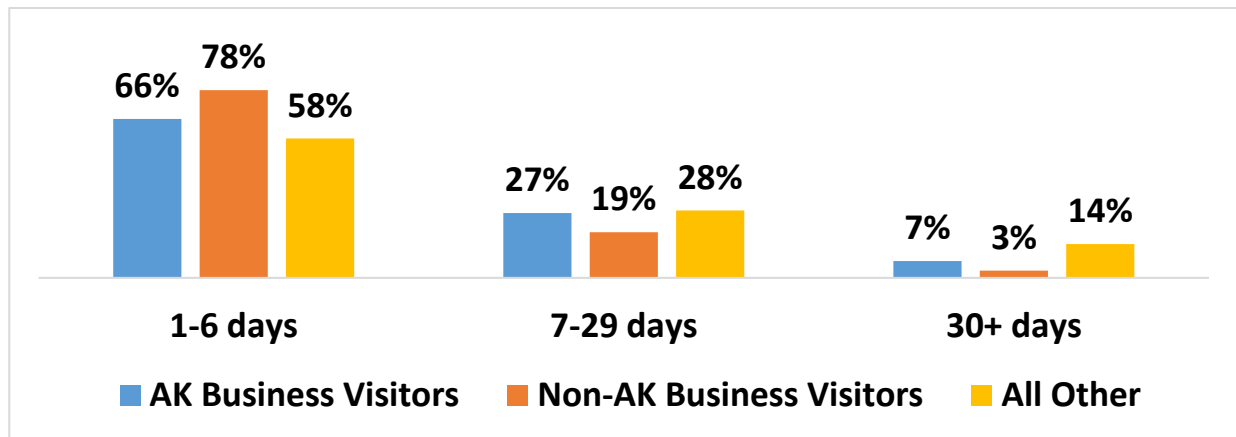
Segmented by business purpose, respondents who came to Juneau for private sector business and those who came for nonprofit business had more trips to Juneau than those with any other business purpose, with only 42 percent and 41 percent visiting once, respectively. In contrast, those visiting for federal, local and tribal business were here for predominantly just one visit.

Figure 11: Number of trips to Juneau by business purpose from January 15, 2018 to April 15, 2018



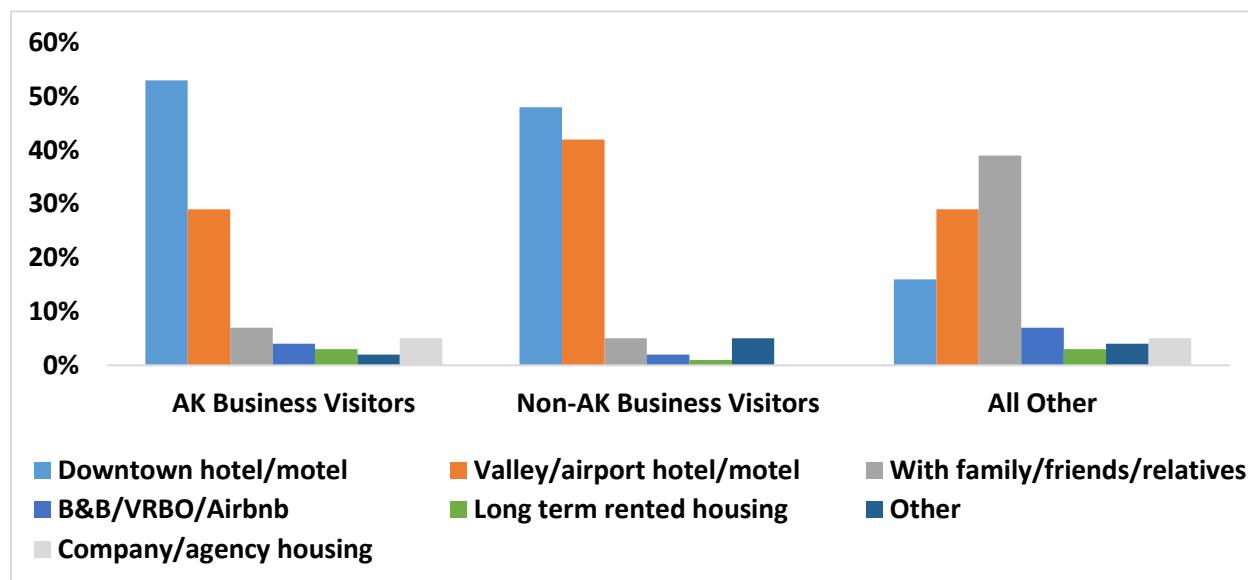
The majority of business visitors to Juneau (70 percent) spent a total of less than a week here during the legislative session, despite many coming for more than one visit. Just over half of visitors for purposes other than business also stayed for less than one week altogether.

Figure 12: Approximately how long altogether will you spend in Juneau between January 16, 2018 and April 15, 2018



The majority of those that spent the night during the trip they were surveyed did so in a hotel (78 percent), similar to findings in 2015 and 2013. New in 2018, respondents were asked for the location of their hotel. Alaskans visiting on business (most likely to be government business) were more likely to stay at a downtown hotel (53 percent), while non-Alaskan business visitors (most likely here for private sector business) were nearly split between hotels downtown and in the Valley/airport area. Those visiting for other than business purposes were most likely to stay with family or friends.

*Figure 13: Where Did You Stay?*



When asked about the primary form of transportation used during this specific visit (respondents could select more than one) 36 percent of all respondents selected rental car, far more than those selecting taxi (15 percent), getting a ride with others (16 percent), or walking (13 percent), all of which were the next most frequent choices. In 2013, in contrast, a rental car was selected by 39 percent of respondents and walking was almost as likely, at 33 percent of respondents.

However, as in 2015, differences emerged when responses were segmented by visitor residence and trip purpose. The first choice of transportation for Alaskans here for business was a rental car (39 percent), followed equally by taxi (21 percent) or walking (21 percent). The first choice of transportation for two thirds of non-Alaskans here for business was a rental car (66 percent). Another 20 percent used a taxi, and very few walked. A hotel in the Valley area and business in parts of town other than downtown most likely contributes to this choice. Those here for reasons other than business rode with friends or family most often. The 2018 survey included the selection of Uber and Lyft for the first time, as these are now available in Juneau. Approximately 5 percent of all visitors used this option.

Transportation choices were compared for all business visitors by business purpose. As in 2015, visitors to Juneau for legislative or session business, many here as constituents, were the most likely to walk as their primary means of transportation. Those traveling for private sector business or government business, where expenses are most likely covered by the employer, are most likely to rent a car. In addition, those who need to go to other areas of Juneau than downtown will most likely need to rent a car. Those traveling on federal business are the most likely to have a government car to use.

*Figure 14: What was your primary form of transportation during this stay?*

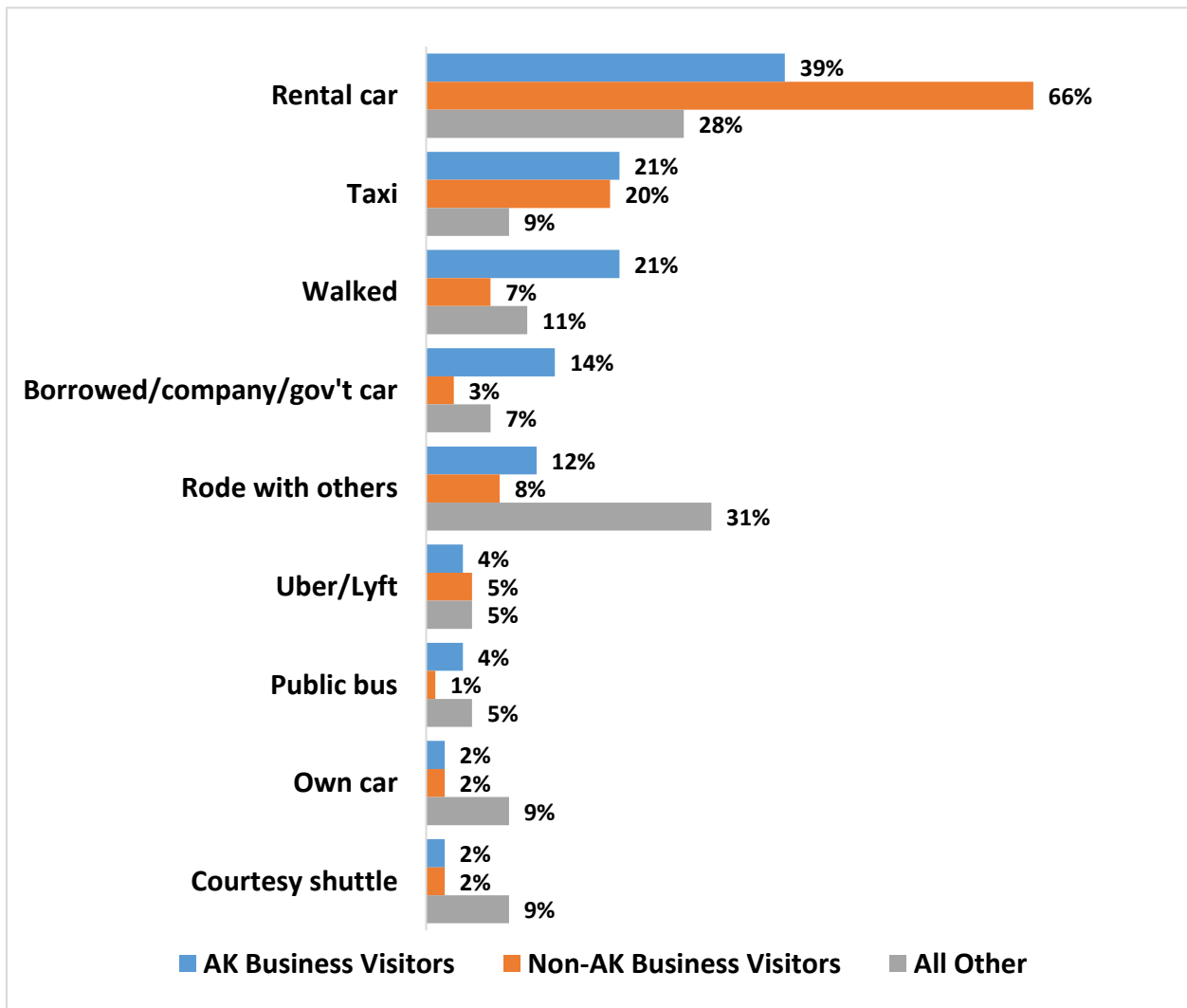


Figure 15: What was your primary form of transportation for a business-related visit?



### Trip Aspect Evaluation

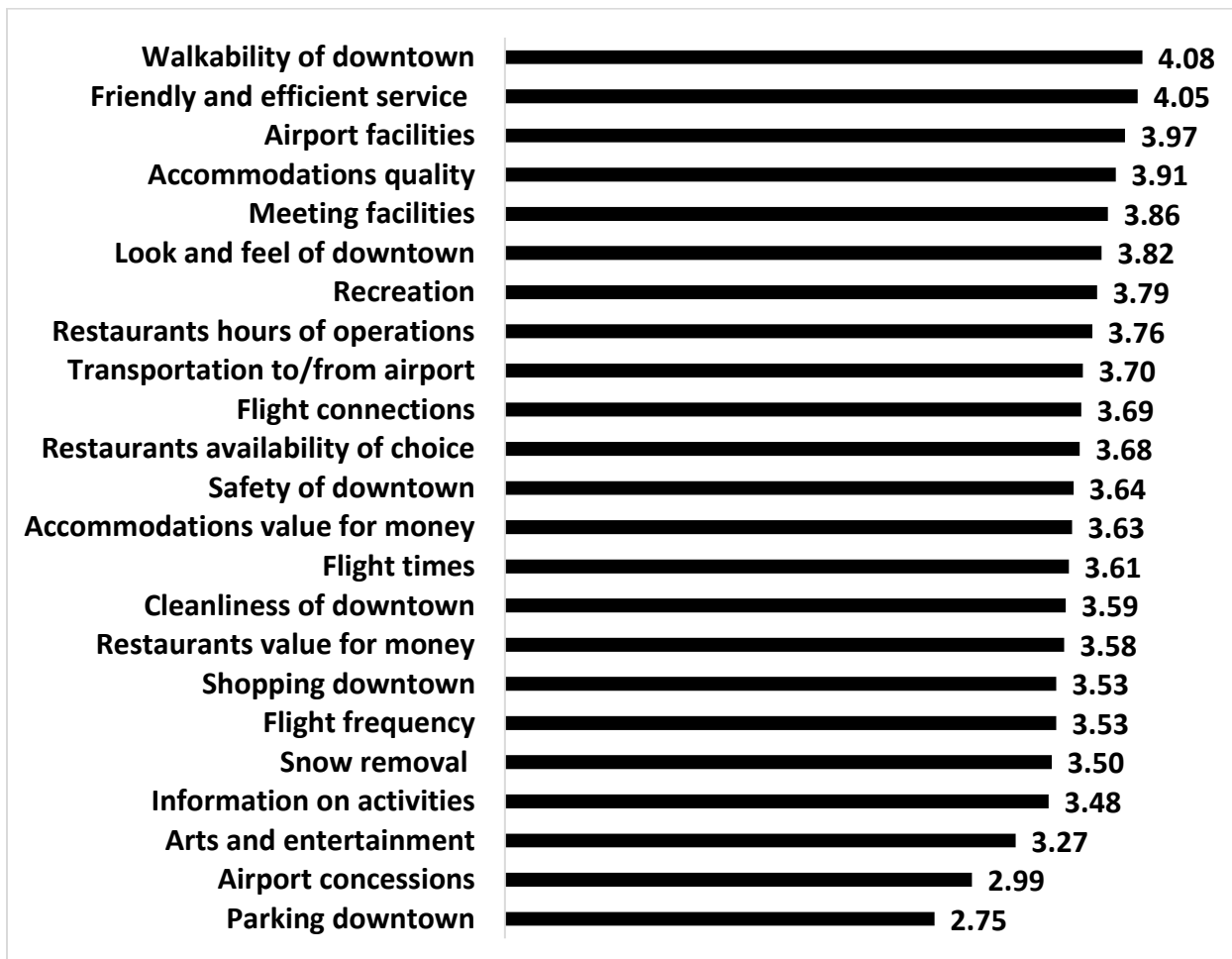
Survey respondents were asked to rate several aspects of their visit to Juneau. Using a 1-5 scale, respondents were asked if they were very satisfied, satisfied, neutral, dissatisfied, or very dissatisfied (5=very satisfied, 1=very dissatisfied) with aspects of downtown Juneau, aspects of Juneau’s recreation and entertainment options, and aspects of Juneau’s airport. Respondents could also indicate if they did not use specific aspects. Two measures are used to evaluate responses based on this rating scale:

- Average Evaluation Score: rating scale responses (on the 1 to 5 scale) are averaged over the number of responses received for a question. The result is an average evaluation score for each trip aspect.
- Satisfaction Measure: the combined percent of respondents who scored a trip aspect as satisfied (4) or very satisfied (5) gives the satisfaction measure.

The 2018 survey asked respondents to evaluate 23 aspects, up from 18 in 2015. Aspects of accessibility to Juneau, specifically flight frequency, times and connections were added to the current survey, and questions about safety of downtown, snow removal and availability of information were also added. These additions are the result of issues identified through comments in the 2015 survey.

Figure 16 ranks Average Evaluation Score results for all 23 aspects from highest satisfaction measure to lowest for all business visitors. As in 2015, the walkability and look and feel of downtown are highly rated, as is the friendliness and efficiency of Juneau residents, and the airport facilities.

*Figure 16: Average Evaluation Score ranking of Juneau amenity aspects*



*Downtown parking, Airport concessions*<sup>1</sup> and *Shopping* again appear at the bottom of the list, as they did in 2015. However, several newly added aspects also appear at the bottom of the list. *Cleanliness of downtown, Snow removal, and Information on activities* rank 15, 19, and 20, respectively, confirming that these issues could be addressed to improve visitor satisfaction.

Figure 17 ranks the Satisfaction Measure for the 16 aspects that were evaluated by respondents in both 2015 and 2018. *Walkability of downtown, Friendly and efficient service* and *Airport facilities* are the highest scoring aspects of Juneau in both surveys. Accommodations have improved in Juneau since the 2015 survey. *Accommodations quality* is now ranked in fourth place, and *Accommodations value for money* has moved up to the middle in ranking from near bottom in 2015. Satisfaction with meeting facilities has also improved, from number 11 in 2015 to number 7 in 2018.

*Figure 17: Satisfaction Measure ranking comparison 2015 to 2018 for Juneau amenity aspects common to both surveys*

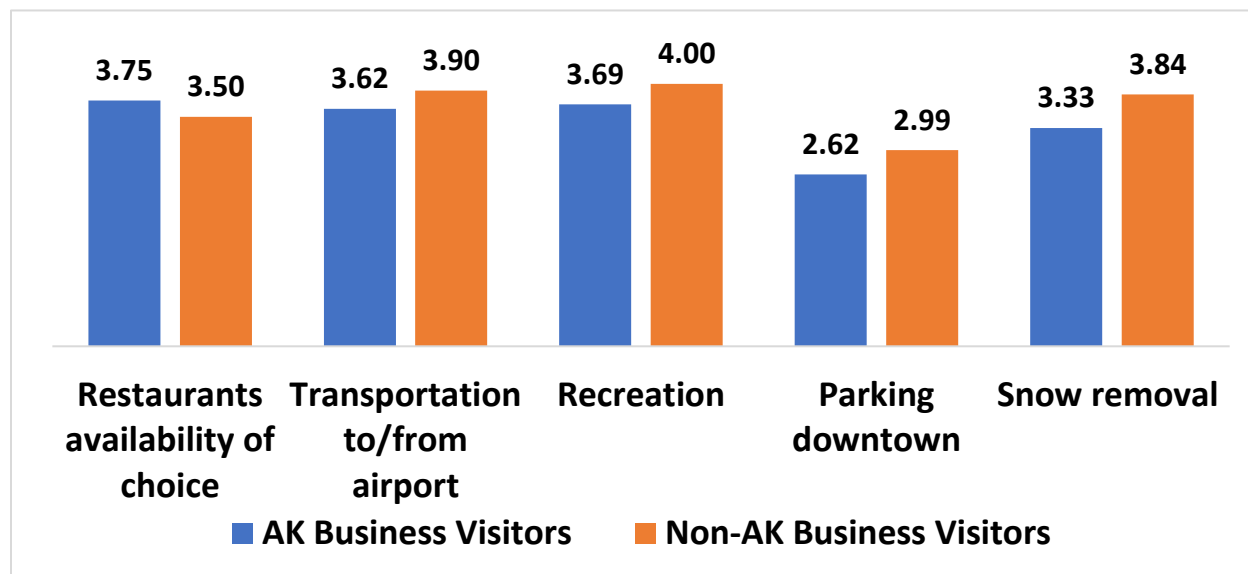
Satisfaction Rank 2015		Satisfaction Rank 2018	
1	Walkability of downtown	1	Walkability of downtown
2	Friendly and efficient service	2	Friendly and efficient service
3	Airport facilities	3	Airport facilities
4	Cleanliness of downtown	4	Accommodations - quality
5	Look and feel of downtown	5	Look and feel of downtown
6	Accommodations - quality	6	Restaurant - hours of operation
7	Restaurants - hours of operation	7	Meeting facilities
8	Restaurants - availability of choices	8	Restaurants - availability of choices
9	Recreation	9	Restaurants - value for money
10	Restaurants - value for money	10	Accommodations - value for money
11	Meeting facilities	11	Recreation
12	Arts and Entertainment	12	Cleanliness of downtown
13	Accommodations - value for money	13	Shopping
14	Shopping	14	Airport concessions <sup>1</sup>
15	Airport concessions <sup>1</sup>	15	Arts and Entertainment
16	Downtown parking	16	Downtown parking

Of greatest concern is the finding that *Cleanliness of downtown* has fallen from near the top in satisfaction in 2015 to near the bottom in 2018. The Alaska State Legislature Satisfaction Survey, run concurrently, identified this same aspect of Juneau as a concern.

<sup>1</sup> The food concession had not yet opened in 2015, while in 2018, the food concession was in transition between concessionaires and service was very limited. Based on these rankings, the importance of food and beverage at the airport is evident.

The five aspects of Juneau that scored the largest difference in Average Evaluation Score, a quarter of a point or more, between Alaskans and non-Alaskans visiting Juneau on business are shown in Figure 18. Alaskans were much more satisfied with the choice of restaurants in Juneau than visitors from outside of Alaska. However, Alaskans gave transportation to/from the airport, recreation, parking and snow removal significantly lower scores. Snow removal scored the largest difference of all aspects, a .51-point difference.

*Figure 18: Average Evaluation Score comparison for Alaska resident and non-Alaska resident business visitors (where 5=very satisfied and 1=very dissatisfied)*

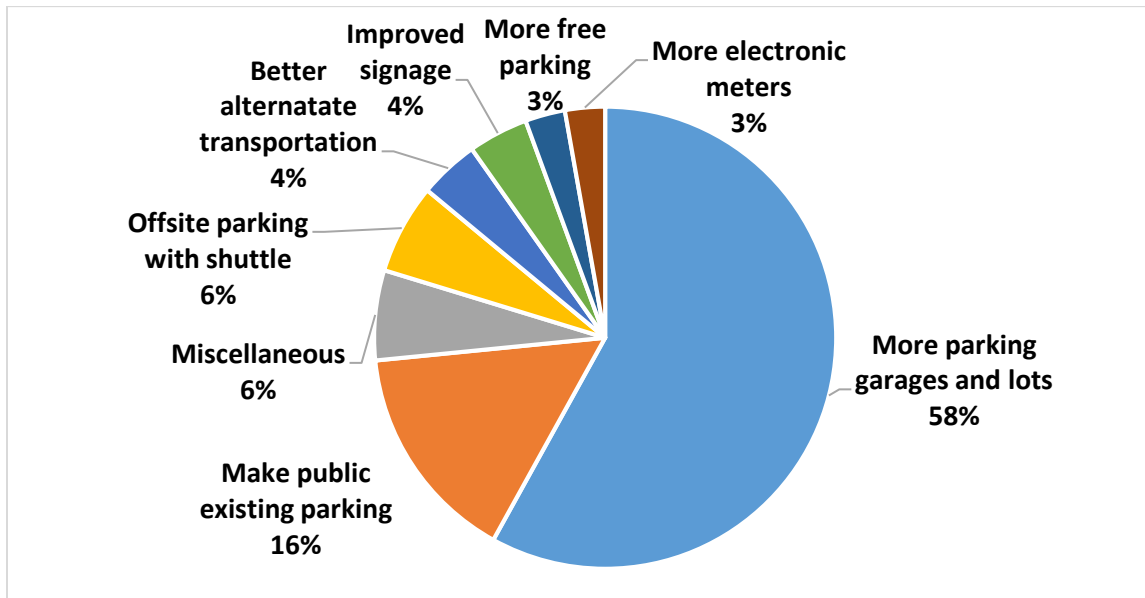


### Downtown Parking Satisfaction

New to the 2018 survey, respondents were asked the optional question “*What can Juneau do to improve parking downtown?*” Thirty-seven percent of respondents provided comments. The most frequent response was the suggestion to construct more parking lots or structures (58 percent), followed by the request to make more of the existing parking available to the public (15 percent). Another variation of the suggestion to create more parking in general was to create offsite parking that offered a shuttle downtown (6 percent). Other comments included reducing the need to park by improving alternate modes of transportation, improving signage leading to parking and clearly designating spots, making more parking free, and adding more opportunities for electronic payment to reduce the need to carry cash.



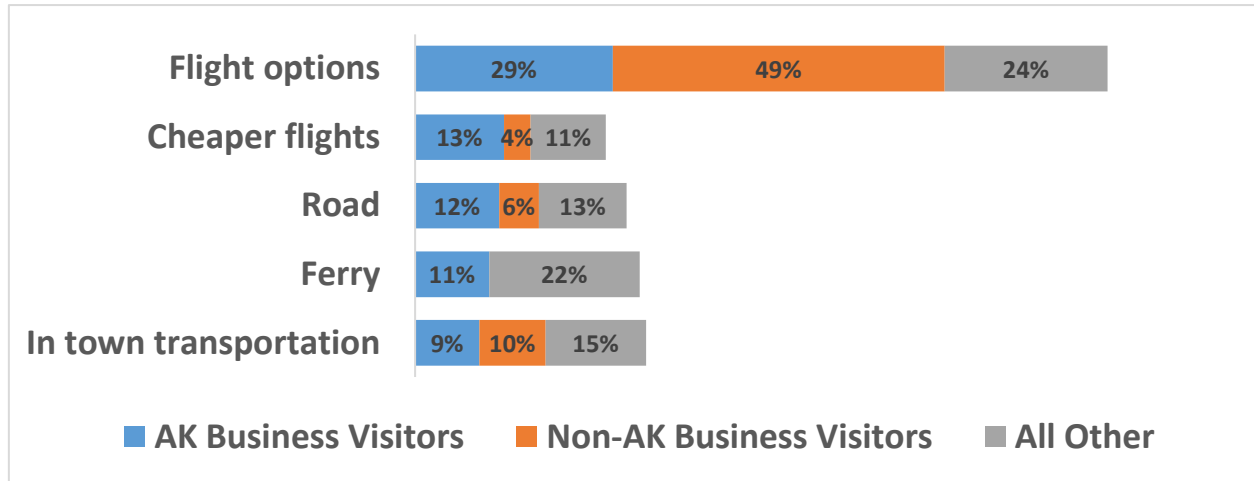
Figure 19: What can Juneau do to improve parking downtown? (Percent of responses received)



### Access to Juneau

Also new in 2018, the survey included an open response question that asked respondents “*In your opinion, what would most improve your access to Juneau?*” Fifty-seven percent of respondents provided a comment. Among all business visitors, the overwhelming response was a request for more flight options, specifically more flights. While 29 percent of Alaska residents visiting on business requested more daily flights, among Non-Alaskans visiting on business, 49 percent requested more flights. A few specified that more direct flights to other hubs would be helpful and many requested more non-stop flights to Seattle. The percent of Alaska-resident business visitors suggesting better road access (12 percent) and suggesting better ferry access (11 percent) were very close. In contrast, there were no requests from non-Alaska resident business visitors for improved ferry access, while 22 percent of all non-business-related visitors requested better ferry access. The fifth most frequent suggestions concerned in-town transportation. Comments were received concerning better cab service, more Uber/Lyft drivers, bus/shuttle around downtown and/or to downtown, and confusing/hard to find bus schedules.

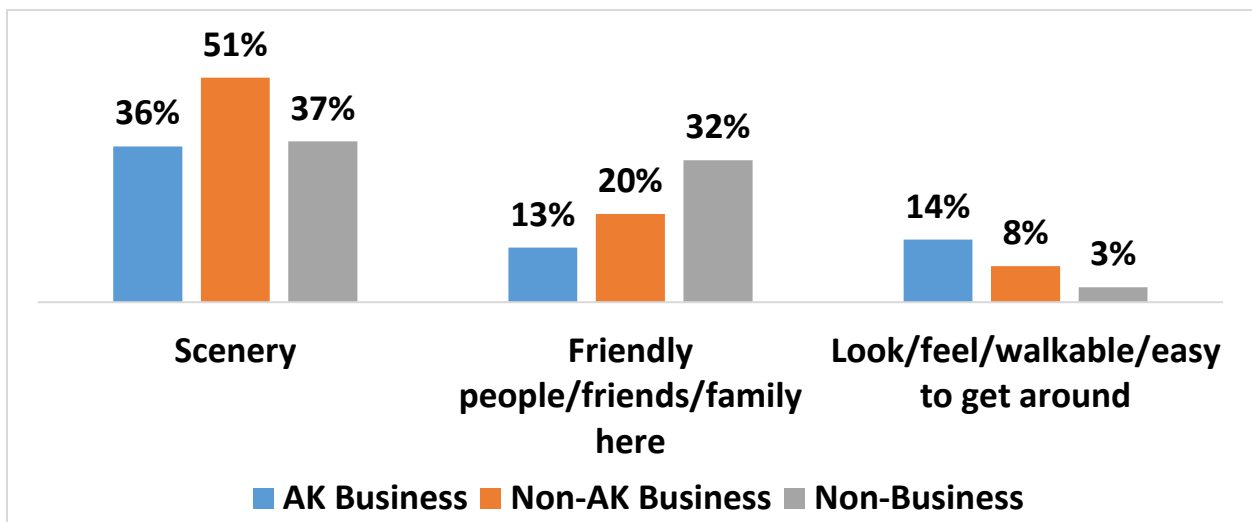
**Figure 20: In your opinion, which of the following would most improve your access to Juneau?**



**What Visitors Like Most about Juneau**

Juneau’s beautiful scenery was the most frequent response to the open-ended question “*What do you like most about visiting Juneau?*” among all visitors to Juneau who chose to answer the question. Scenery was a favorite aspect especially among non-Alaskan business visitors, with “*glaciers*” being a popular mention. The overall friendliness of Juneau or visiting family and friends was the next most frequent response among all respondents. In addition to the scenery and the people, another aspect frequently mentioned by all respondents was the look, feel, and walkability of downtown Juneau. Alaskan business visitors were especially pleased with this aspect of their Juneau visit, relative to the other groups.

**Figure 21: What do you like most about visiting Juneau? (Percentage of mentions by group)**

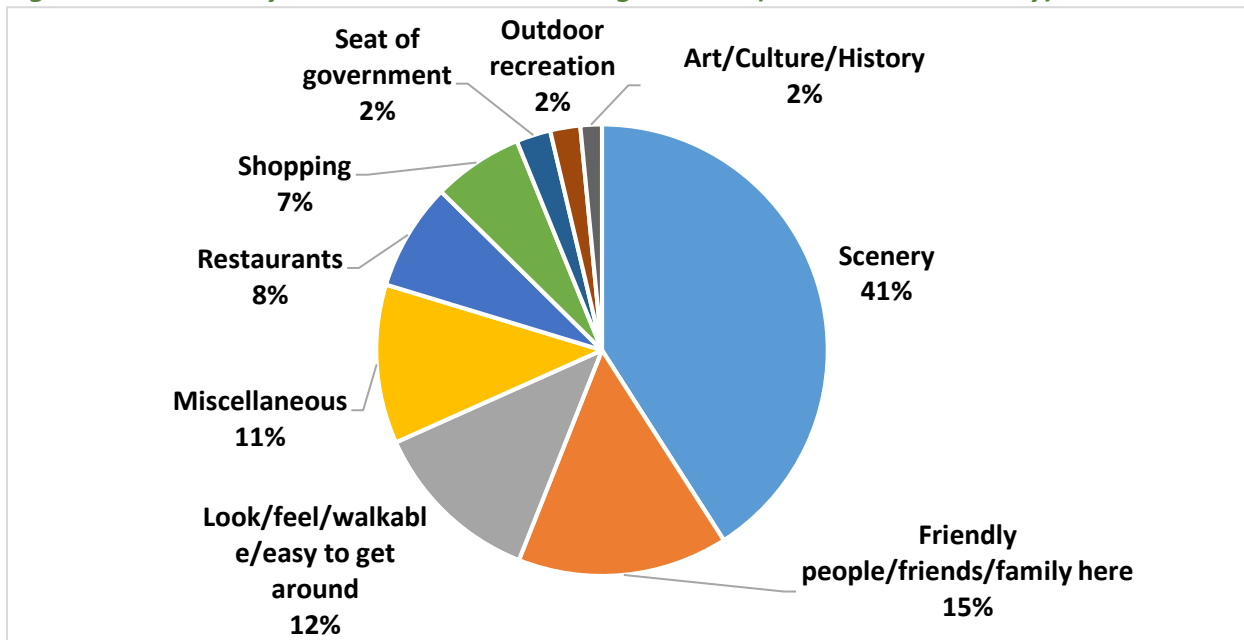


That respondents are very happy overall with their visit to Juneau is evident from comments provided, and 71 percent of all respondents chose to make one or more comments. Comparing the 2018 responses from business visitors to those of the 2015 survey, the largest increase in

responses occurred in the “Scenery” and “Friendly people/friends/family here” categories. Scenery remained the most frequent response but jumped to 41 percent of responses in 2018 from 31 percent in 2015. “Friendly people/friends/family here” moved from the third most frequently mentioned to second place with 15 percent of responses in 2018 versus 16 percent in 2015.

“Look/feel/walkable/easy to get around” experienced the most significant change from 2015. Between 2015 and 2018, praise of the “Look/feel/walkable/easy to get around” Juneau decreased from 27 percent of responses to 12 percent. The remaining categories experienced only marginal changes between the two survey years.

**Figure 22: What do you like most about visiting Juneau? (Business visitors only)**



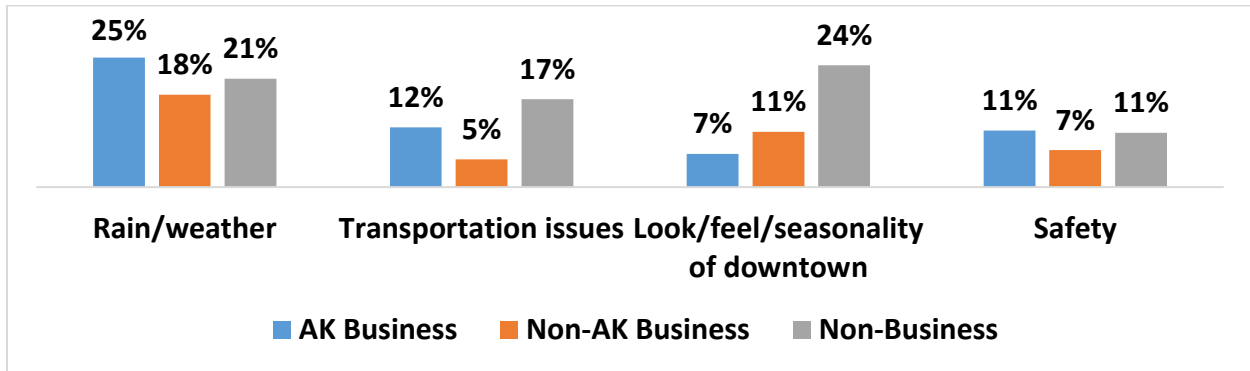
### What Visitors Like Least about Juneau

While the question “What do you like most about visiting Juneau?” received 442 responses, the question “What do you like least about visiting Juneau?” received only 212 responses. Responses to both questions were optional. The most frequent complaint was about the weather (23 percent), especially the rain, followed by transportation issues (10 percent). Transportation issues consisted mainly of complaints about the difficulty of accessing downtown from the airport, either due to the inconsistency of taxis or a lack of information to efficiently use Capital Transit.

In addition to issues with the weather and transportation, many visitors were concerned about the deterioration of public safety in downtown Juneau and the maintenance of buildings and seasonality of businesses downtown. Other complaints concerned restaurants, high prices, and issues with parking. Complaints about Juneau’s restaurant options and quality were second by

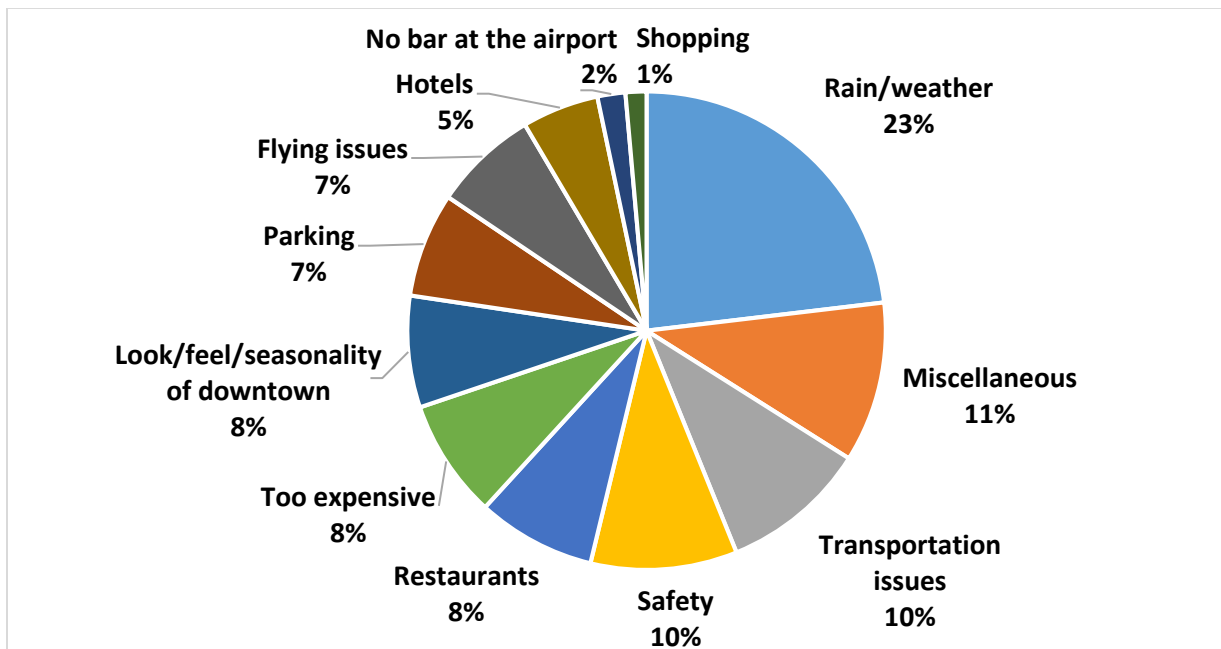
non-Alaskan business visitors only to their dissatisfaction with the weather. While Alaskan business visitors had the largest percentage of respondents that did not care for Juneau weather, non-business visitors were displeased most by the look, feel, and seasonal nature of downtown Juneau. This was the only group whose least favorite aspect of Juneau wasn't the weather.

**Figure 23: What do you like least about visiting Juneau? (percentage of mentions by group)**



Compared to 2015, it appears issues surrounding flying experiences have decreased, going from the second most frequent response in 2015 to the eighth most frequent response in 2018 (16 percent in 2015 versus 7 percent in 2018). The most significant increases in issues among respondents were seen in responses regarding the look and feel of downtown, especially outside of tourist season, and safety of Juneau. In previous years' surveys, safety has not been a noteworthy concern among respondents. However, this year, 1 in 10 respondents mentioned this as an issue. The issue of safety, especially relating to vagrants in the downtown area, is one that persisted throughout the 2018 survey.

**Figure 24: What do you like least about visiting Juneau? (Business visitors only)**

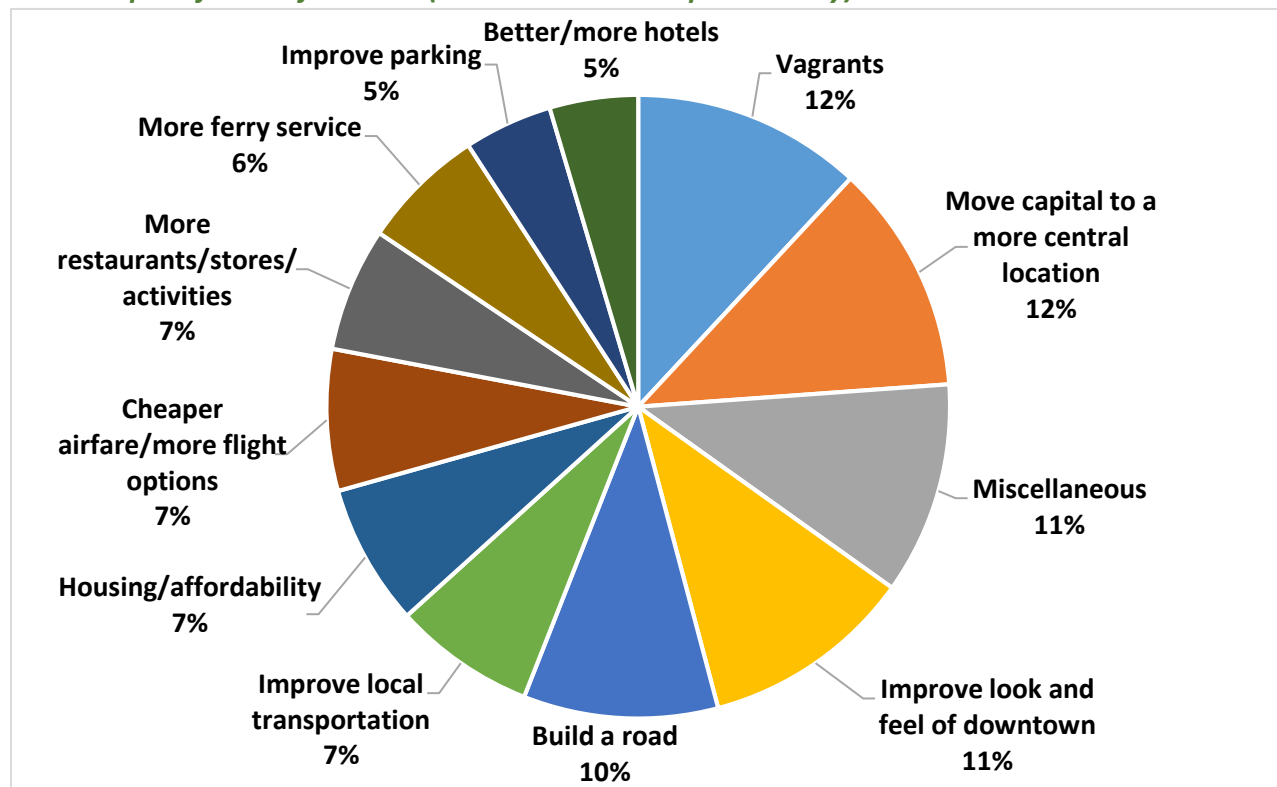


### Improvements to Make Juneau a Better Capital City

Respondents were asked the optional question, “What can the people and/or the local government of Juneau do to make Juneau a better capital for all of Alaska?” Only thirty-nine percent of respondents provided a comment. The three most prominent suggestions were to do something about the vagrant population (12 percent), move the capital elsewhere (12 percent), and improve downtown (11 percent). Concerns about the vagrant population were especially pronounced among non-business respondents. Compared to 2015, where mentions of vagrants did not require a distinct category, in the past three years the vagrant issue has emerged as a concern for visitors to Juneau. This follows the concern for safety in responses to the question “What Do You Like Least About Visiting Juneau?”

In aggregate, the most frequent response to the question “What can the people and/or the local government of Juneau do to make Juneau a better capital for all of Alaska?” had to do with improving access to Juneau. Responses included desires for the construction of a road north (10 percent), cheaper or more flight options (7 percent), and more consistent ferry service (6 percent). Other popular suggestions for improving Juneau as a capital city were to decrease the cost of living and housing prices (7 percent), and increase services, including restaurants, stores, and activities (7 percent).

**Figure 25: What can the people and/or the local government of Juneau do to make Juneau a better capital for all of Alaska? (Alaska resident responses only)**



Apart from the addition of the issue of vagrants, new in 2018, the frequency of mention of other categories of responses were very little changed from the frequency of mention in 2015.

## SUMMARY OF FINDINGS

Alaskans visiting for business purposes are the most likely to be in Juneau for legislative or session business and come here from Anchorage or other Southcentral communities. Non-Alaskans are most likely to visit for private sector business, coming from Washington State. Alaskan visitors stay longer when in town and visit more frequently.

Visitors to Juneau for legislative or session business are least likely to rent a car and most likely to stay in a hotel downtown and walk as their preferred method of transportation. Visitors to Juneau for private sector business by far prefer to rent a car, and are equally likely to stay downtown or in the airport/Valley area.

Satisfaction with the walkability of Juneau's downtown, friendly locals, and airport facilities remains high. However, cleanliness of downtown, which was rated fourth highest in satisfaction in 2015 fell near the bottom in ranking in 2018. The Alaska State Legislature Satisfaction Survey, conducted simultaneously with elected officials and staff, identified the same concern. As visitors for legislative and session business prefer to walk while in town, this is an aspect of Juneau identified as needing to be addressed. Further, snow removal, not surveyed in 2015, was near the bottom in satisfaction, with Alaskan visitors far more dissatisfied than non-Alaskan visitors. This concern is also consistent with findings in the Legislature Satisfaction survey.

Satisfaction with accommodations improved since 2015. Both quality and value for money moved up in Satisfaction Measure ranking. Satisfaction with meeting facilities also improved.

Dissatisfaction with the weather remained the most frequent complaint about Juneau. Whereas in 2015 flying issues were second in dissatisfaction, in 2018 issues with local transportation took second place, with 10 percent of all comments received. Transportation to/from the airport was cited as stressful, including not enough taxis meeting planes, and not enough Uber and Lyft drivers. Compared to only two percent of comments in 2015 concerning airport access, this increase should be of concern to the community.

However, the finding of most concern in the 2018 survey is the number of comments received about the vagrants/homeless downtown and the crime. Together, these comments on perceived safety come to another 10 percent of all comments. There were very few comments about this in the 2015 survey. The prominence of this concern is again consistent with the findings of the Legislature Satisfaction survey. The Alaska Committee, its community partners, and the CBJ will need to better evaluate this situation to understand its causes and begin to take appropriate mitigation action.

## APPENDIX 1: DEMOGRAPHIC AND TRIP DATA COMPARISON 2018, 2015, 2013, 2009

Age Group	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
18 to 24	5	5	2	2
25 to 39	25	22	18	16
40 to 54	34	35	49	45
55 to 64	25	30	25	30
65 or older	11	8	6	7

Gender	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Male	62	65	73	69
Female	38	35	27	31

Profession (select all that apply)	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Private sector worker	43	44	55	32
Other state or university employee	10	19	20	21
Nonprofit worker	8	11	8	7
Federal government worker	7	8	6	10
City or tribal employee	5	8	3	
Constituent	7	8	1	2
Lobbyist	4	4	3	n/a
Legislator, Legislative staff or support	1	2	3	14
Other	14	5	5	7
Board member/associate/society member	7	n/a	n/a	n/a

Primary Trip Purpose	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Legislative or session business	25	30	29	36
Other state business	13	17	17	18
Federal business	11	9	55	46
Other business	51	44		

Length of Trip	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
1 day	28	31	30	21
2 days	25	31	23	27
3-7 days/3-5 days	38	31	30	27
8-14 days/6-13 days	5	4	9	8
15+ days/14+ days	5	3	8	17

Time Spent in Juneau During Last Legislative Session	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Less than a week	67	74	61	49
More than a week, less than a month	26	18	22	23
More than a month, but not entire session	8	5	8	28
Most or all of session		3	10	

Place of Residency	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Anchorage	31	42	37	48
Other Southcentral	11	14	17	17
Fairbanks	6	8	8	10
Southeast	11	7	9	6
Rest of Alaska	5	7	2	4
Outside Alaska	36	23	27	15

Accommodation (select all that apply)	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Hotel/motel/B&B	78	78	79	68
Rented apartment/condo/room	2	2	4	17
With friends/relatives	5	4	6	8
Did not stay overnight	10	14	9	7
Other	5	1	5	



Transportation (select all that apply)	Percent in 2018	Percent in 2015	Percent in 2013	Percent in 2009
Rental car	36	39	37	44
Walked/on foot	13	33	10	n/a
Taxi	15	28	16	16
Rode with friends/colleagues	16	17	10	9
Courtesy shuttle	4	9	12	3
Borrowed/company/government car	11	8	7	7
Own car	3	3	5	14
Other	2	3	3	7