

2009 Legislative Session



Visitors Satisfaction Survey Results



May 2009

JEDC research is supported by generous contributions from the following sponsors:

Tongass Partners



Northern Lights Partners



Totem Partners

Coastal Helicopters • Hecla Greens Creek Mining Company • IBEW Local 1547

Project Overview

The Alaska Committee and the Juneau Economic Development Council collaborated to conduct a Legislative Session Visitors Satisfaction Survey directed at those visiting Juneau for business or legislative purposes during the 2009 legislative session.

Methodology

The survey focused on Alaska residents traveling to Juneau specifically for legislative session purposes, but captured all business travelers. The purpose of the survey was to better understand which elements legislative and business travelers most enjoyed about their stay in Juneau, and how the community can better serve those who come to Juneau during session. Along with demographic questions, those departing Juneau were asked to rate 13 aspects of their Juneau stay. They were also asked open-ended questions regarding what they liked most, what they liked least, and what improvement would make Juneau a better capital city. Juneau residents and those not in Juneau for business purposes were excluded from the survey. A copy of the actual survey can be found in the appendix of this report.

The survey was conducted using an exit methodology, using defined intervals to intercept travelers at the Juneau International Airport. Surveying took place from March 19th through April 23rd. The survey was administered to 260 business travelers as they departed Juneau. While surveyors met each departing Alaska Airlines flight number at least once, the survey team focused most of its resources on flights departing for Anchorage and Fairbanks on or near the weekend.

The survey has a maximum margin of error of ± 6.1 percent at the 95 percent confidence level.



*JEDC surveyor at the Juneau airport
Photo courtesy of Courtney Nelson*

Average Trip Element Ratings

Using a 1-5 scale, respondents were asked if they were *Very satisfied*, *Satisfied*, *Neutral*, *Dissatisfied*, or *Very dissatisfied* with several elements of their stay (5 being *Very satisfied*, 1 being *Very dissatisfied*). Average ratings for each category were calculated as follows:

Average Satisfaction Rating by Category

Category	Overall Average Rating
Recreation	4.5*
Sightseeing/Attractions	4.5*
Arts & Entertainment	4.3*
Overall Juneau Experience	4.2
Walking	4.2
Meeting Facilities	4.1
Accommodations & Lodging	4.0
Hotel Accommodations only	3.8
Rental Accommodations only	4.4
Transportation Within Juneau	4.0
Restaurants	3.9
Look and Feel of Downtown Juneau	3.9
Airport Facilities	3.7
Shopping	3.7*
Parking	2.8

Notes: Very Satisfied=5, Satisfied=4, Neutral=3, Dissatisfied=2, and Very Dissatisfied=1.

N=260

*More than 50 percent of respondents in these categories selected "Did Not Use" as their response, so the resulting sample sizes are smaller.

The average scores for Recreation, Sightseeing, and Arts & Entertainment suggest a rating between *satisfied* and *very satisfied*; however, most travelers were not able to partake in these activities, and these categories had response rates of 22 to 44 percent. The next three most highly rated categories included the Overall Juneau Experience, Juneau's Walkability, and Rental Accommodations.

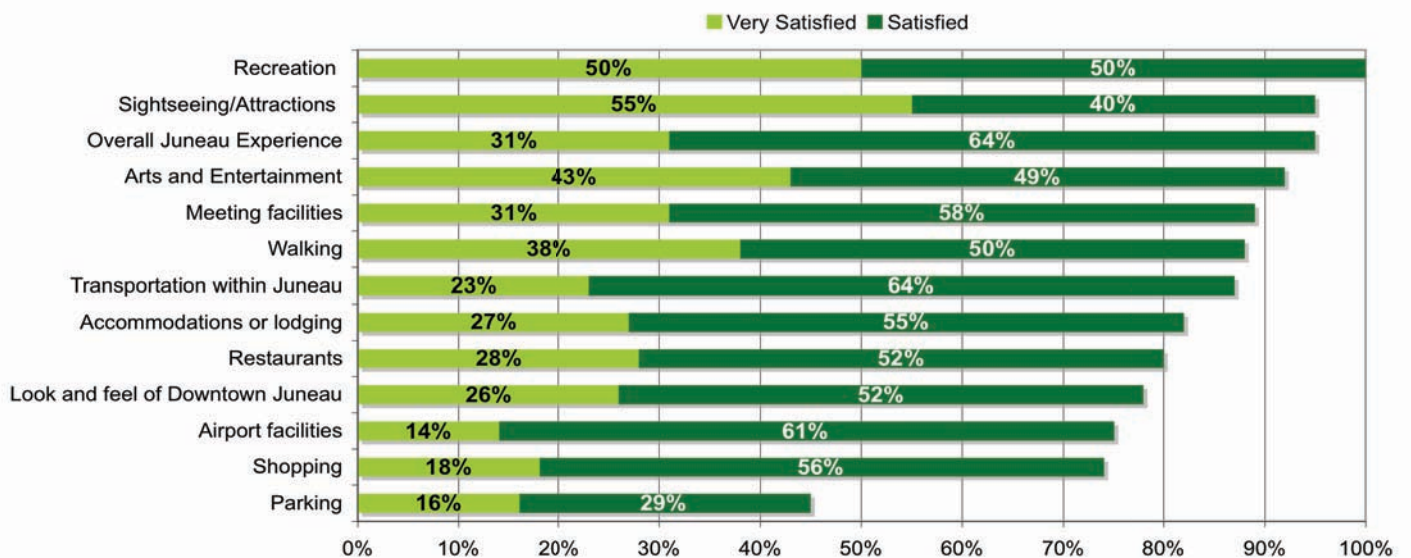
While Alaska's business travelers and legislative workers generally liked their overall Juneau experience, specific elements of their stay were ranked as less than satisfactory. Five elements (Restaurants, Look and Feel of Downtown Juneau, Hotels, Airport Facilities, and Shopping) each received an average rating below *satisfied*, while Parking was rated between *dissatisfied* and *very dissatisfied*.

A more in-depth subgroup analysis of these findings, along with catalogued responses to the open-ended questions, is presented in the following sections.

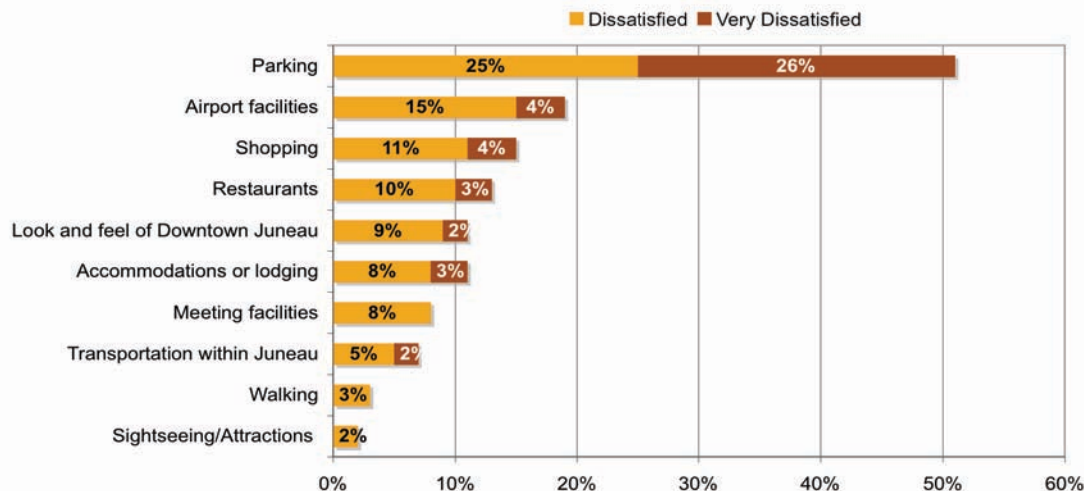
Net Satisfied Versus Net Dissatisfied Ratings

Examinations of net satisfaction (*satisfied+very satisfied*) and net dissatisfaction (*dissatisfied+very dissatisfied*) ratings, along with intensity ratings (percentage of “very” ratings), are as important as average rankings. While most business visitors did not have time for Recreation, Sightseeing, or Arts & Entertainment, those who did rated these areas very highly. Among categories with higher response rates, the Overall Juneau Experience had the highest net satisfaction rate at 95 percent, and Walking garnered the highest *very satisfied* rating at 38 percent. Parking, with a net dissatisfaction rating of 51 percent, ranked highest on the net dissatisfied scale. Twenty-six percent of respondents say they are *very dissatisfied* with the parking situation in Juneau.

Satisfied or Very Satisfied with Elements of Juneau Visit



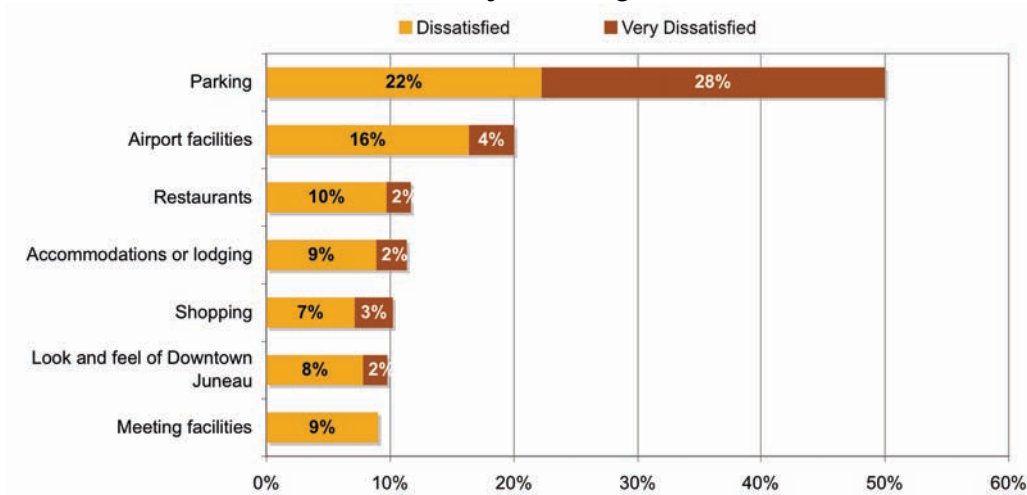
Dissatisfied or Very Dissatisfied with Elements of Juneau Visit



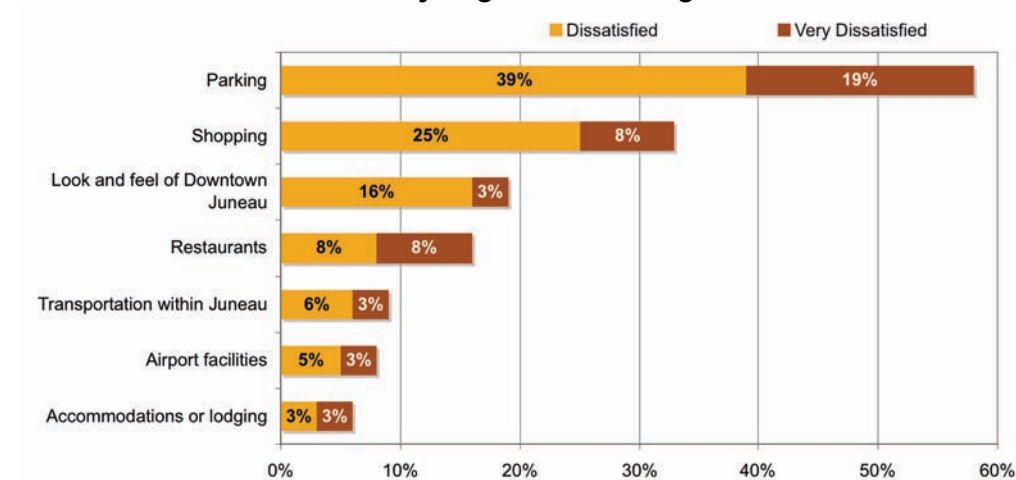
Net Dissatisfied Percentages by Selected Subgroup

In addition to analyzing the results of the group as a whole, subgroup analysis allows us to drill deeper into the data and examine differences. While many results remained similar among subgroups, the most interesting difference in the overall net dissatisfaction ratings occurred between legislative visitors—including legislators and their staffers—and everyone else, or “non-legislative” visitors. While Parking topped the net dissatisfied ratings in both subgroups, 20 percent of non-legislative visitors were *dissatisfied* or *very dissatisfied* with Juneau’s airport facilities, compared to just 8 percent of legislative visitors. Ranked second and third on the net dissatisfied scale for legislative visitors were the Juneau Shopping experience (33% net dissatisfaction) and the Look and Feel of Downtown Juneau (19% net dissatisfaction).

**Dissatisfied or Very Dissatisfied with Elements of Juneau Visit
By Non-Legislative Visitors**



**Dissatisfied or Very Dissatisfied with Elements of Juneau Stay
By Legislators or Legislative Staffers**



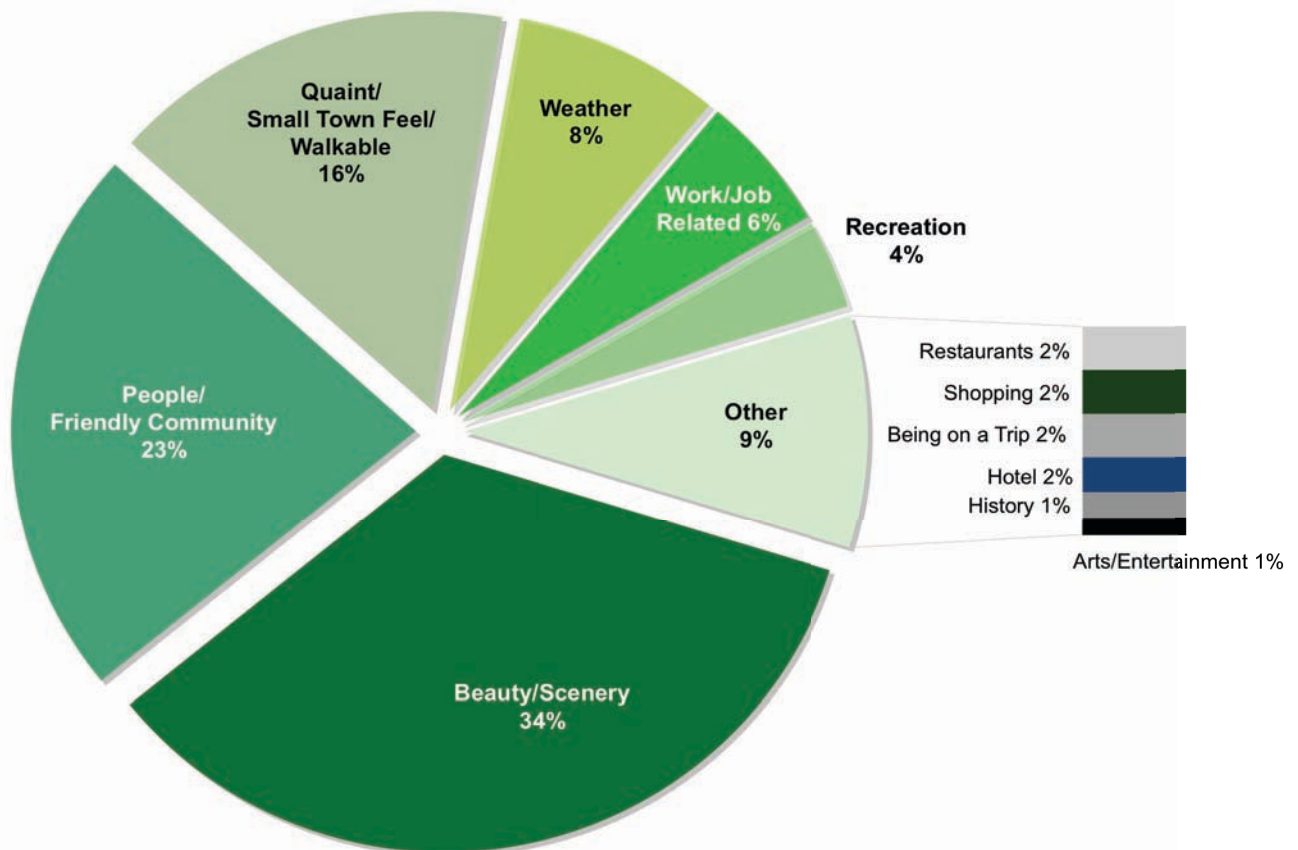
What Session Visitors Like the Most, the Least, and How Juneau Can Be a Better Capital City

In addition to rankings, those who visited or stayed in Juneau during the legislative session for work purposes were asked open-ended questions regarding what they liked most, what they liked least, and what they believed would make Juneau a better capital city. While some respondents provided more than one answer to these questions, the graphs below depict only their top answer.

What Do You Like Most About Visiting Juneau?

Just over a third (34%) of respondents said that Juneau's number-one attribute is its scenic and natural beauty. Nearly a quarter (23%) said the best thing about Juneau is the friendly nature of the community and the people who live here. One out of six (16%) most enjoyed Juneau's walkability or its quaint, small-town feel. A surprising 8 percent most enjoyed the weather, thanks to a spell of unseasonably warm weather in the final week of the legislative session.

What do you like most about visiting Juneau?

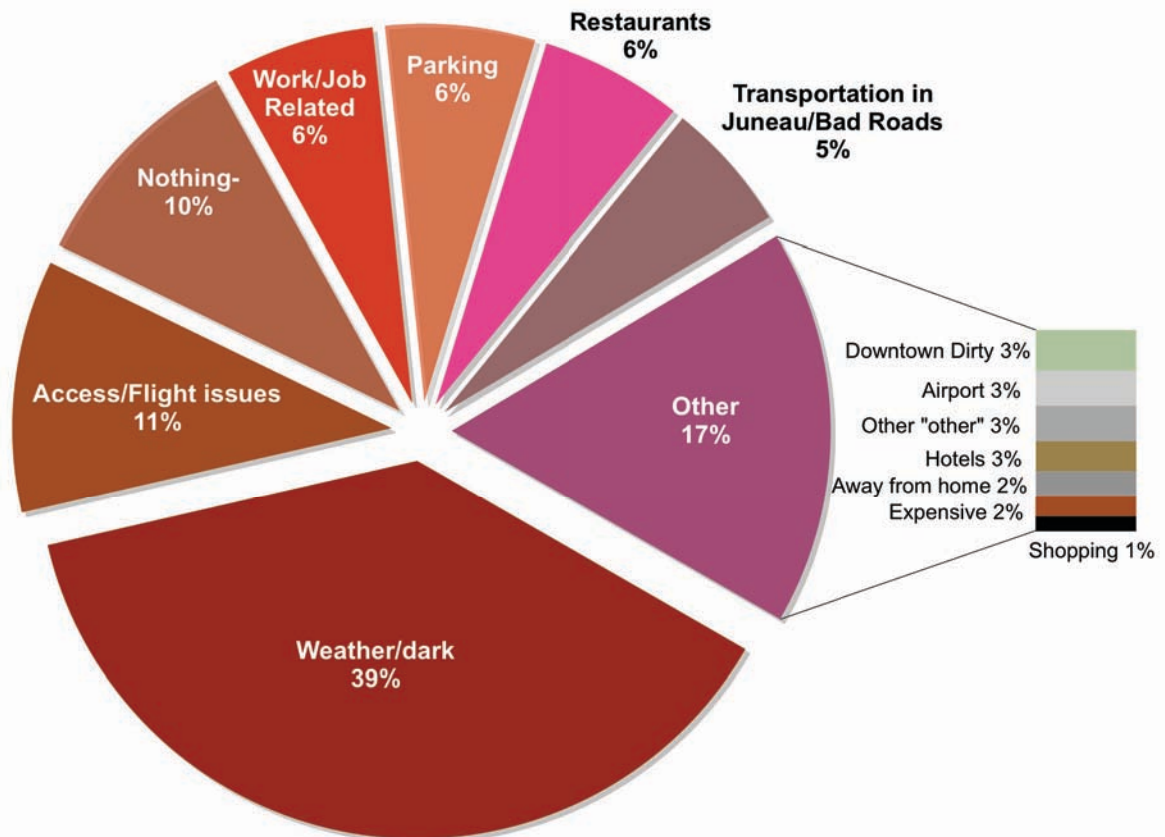


Note: The pie chart depicts open-ended responses to "What do you like most about visiting Juneau," which were then sorted into broader categories.

What Do You Like Least About Visiting Juneau?

The “top” least favorite thing was the dark, cold, damp weather associated with Juneau winters, selected by nearly two out of five respondents (39%). Noted by 11 percent of respondents, frustration over lack of easy access to Juneau during this time period came in second. Ten percent of respondents said there was nothing about Juneau they did not like. Other items that garnered least favorite status among by legislative and business travelers in Juneau during legislative session included work-specific issues (6%); parking (6%); a lack of choice or low quality among Juneau’s restaurants (6%); and transportation within Juneau (5%). Most of the comments in this last category were specifically regarding the poor condition of many of Juneau’s roads.

What do you like least about visiting Juneau?

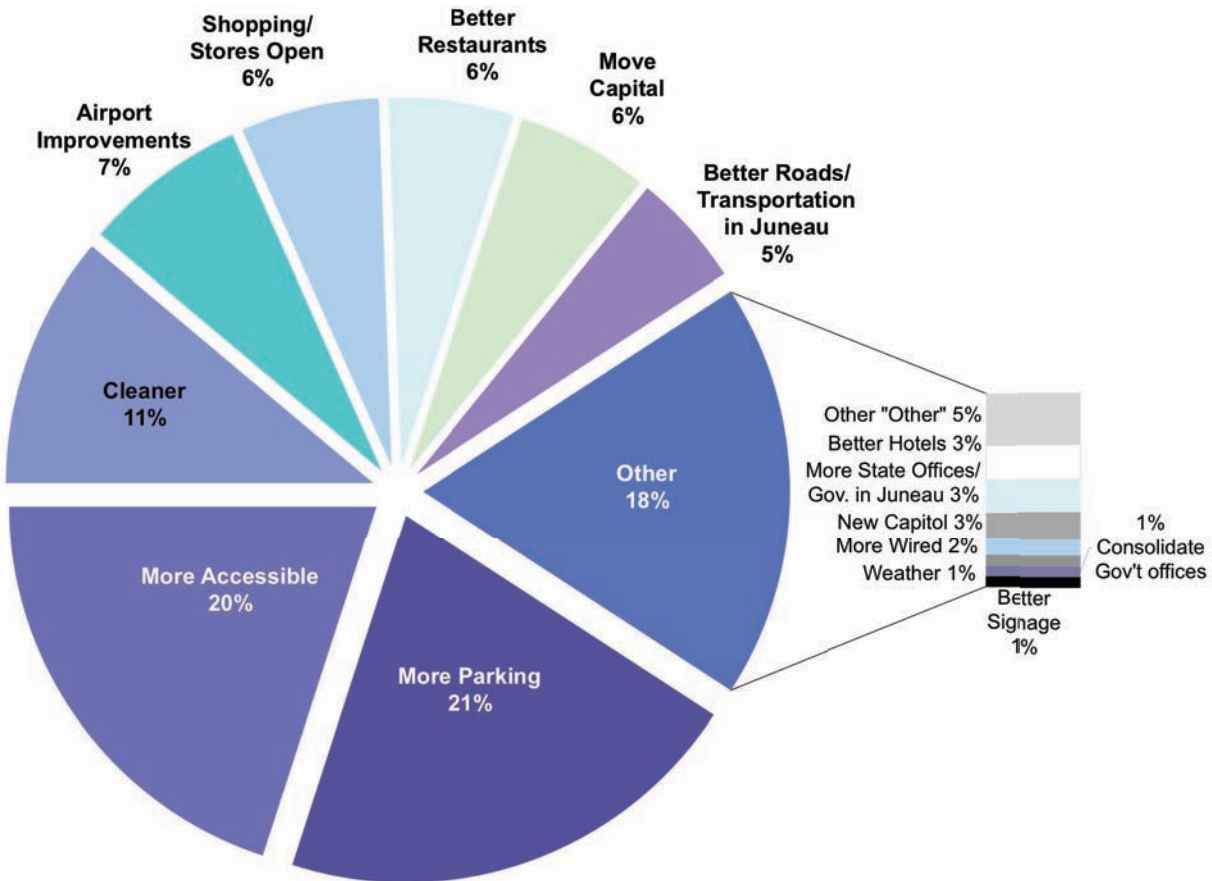


Note: The pie chart depicts open-ended responses to “What do you like least about visiting Juneau,” which were then sorted into broader categories.

What Improvement Would Make Juneau a Better Capital City?

Those who traveled to Juneau for business and legislative purposes were asked how Juneau could be improved as Alaska's capital city. One in five (21%) said that improved parking would make Juneau a better capital. A similar number (20%) suggested ways to improve access to the capital, including building a road to connect Juneau with the interior highway system, increasing the number of flights or changing flight schedules, improving ferry access, or decreasing the travel costs involved. Eleven percent of those surveyed suggested making Juneau a cleaner capital during session. The comments in this area were mostly directed at basic cleanup (trash, dog poop, snow plowed onto sidewalks) but were also directed at repainting shabby buildings, completing downtown construction, and generally improving the look and feel of downtown Juneau. Other suggestions to make Juneau a better capital included improving Juneau's airport facilities (7%), having more shops open downtown during the winter (6%), increasing the selection and quality of local restaurants (6%), moving the capital away from Juneau (6%), and improving transportation within Juneau, including better public transportation and road repair (5%).

What Improvement Would Make Juneau a Better Capital City?



Note: The pie chart depicts open-ended responses to "What improvement would make Juneau a better capital city," which were then sorted into broader categories.

Analysis by Category

Parking

The major finding of this study is the magnitude to which those who travel to Juneau for work are frustrated by local parking problems. Among the 13 categories visitors were asked to rate, Parking was the only category to receive an average scoring of between *dissatisfied* and *very dissatisfied*. When asked what improvement would make Juneau a better capital, the number-one answer was improved parking. The good news is that preparation is already underway for a new 210-space downtown parking garage that will, according to the CBJ website, “dramatically improve parking.” However, additional improvements should also be considered.

Improved Access

As expected, improving access to Juneau through the construction of a road connecting Juneau to the interior highway system, or increased flights, remains a high priority for Alaska’s business travelers. Due to the timing of the survey, complaints regarding Juneau’s unique weather and lack of road were joined by the inability to fly due to volcanic eruptions.

Walkability

Another significant finding was how much legislative and business travelers enjoy being able to easily walk around Juneau’s downtown area. Juneau’s small-town, walkable feel ranked as the third most popular answer (following scenery and friendly people) of what business travelers most like about Juneau, and more than a third of all respondents (38%) said they were *very satisfied* with their Juneau walking experience. Walking was rated even higher among legislative and other public-sector workers, with 54 percent of legislative visitors saying they were *very satisfied* with their walking experience. Juneau’s walkability is an area that can be further improved by providing business and legislative visitors with cleaner streets and sidewalks, more basic necessities within walking distance, and consolidating State offices downtown.

Airport facilities

Plans are underway to modernize and renovate Juneau’s airport terminal and facilities. According to the findings of this survey, these developments will improve the experience of session visitors. Nearly one in five visitors (19%) during session were *dissatisfied* or *very dissatisfied* with Juneau’s airport facilities. Net dissatisfaction rates soared to 30 percent among female visitors, compared to just 11 percent among men, representing the only major gender-based difference in the study.

When asked which one improvement would make Juneau a better capital city, seven percent of travelers suggested improvements to the airport. (Suggestions included improving airport facilities generally, completing airport renovations, improving the departure and arrival areas, having a board room, increasing restaurant hours, and reducing parking fees).

Look and Feel of Downtown Juneau

Nearly one in five legislative visitors surveyed (19%) were *dissatisfied* or *very dissatisfied* with the Look and Feel of Downtown Juneau. The City of Juneau does an excellent job of cleaning and beautifying downtown each year in time for the summer tourist season, but session visitors often see a less tidy Juneau. The third most popular suggestion for making Juneau a better capital city, after parking and access, is to clean up the downtown area for our winter/spring guests as well.

Recreation, Sightseeing, Arts and Entertainment

While the community has excellent offerings in these areas, business travelers often do not have opportunities to enjoy the arts and outdoors of Juneau. Recreation, Sightseeing, and Arts & Entertainment received extremely high net satisfaction rates of 100 percent, 95 percent, and 92 percent, respectively. However, because the participation rates of those surveyed were 22 percent, 44 percent, and 31 percent respectively in these areas, these findings have less weight. Still, despite a 22 percent participation rate, 4 percent of those surveyed said recreation was the best thing about visiting Juneau. While lack of time clearly is the determining factor here, these findings represent opportunities to increase the value of a Juneau visit for session visitors. An example might be to offer a free Eaglecrest ski pass to winter business travelers.

Accommodations, Restaurants and Shopping

Juneau's restaurants, hotels, and shops were given average ratings of below *satisfied* by session business visitors. Using a scale of 1 to 5 with 5 being *very satisfied*, these categories were ranked 3.9, 3.8 and 3.7 respectively. Fifteen percent of those interviewed named improvements in at least one of these areas as a way to improve Juneau as a capital city. So, while these are not the most important areas of concern to session visitors, clearly there is room for improvement in each of these categories.

In contrast, in the "accommodations" category, those renting a place to stay during session were rather happy. They scored their accommodations at 4.4—between *satisfied* and *very satisfied*—and had a net dissatisfaction rate of only three percent.

Overall Juneau Experience

Despite dissatisfaction with specific areas, business travelers to Juneau during the legislative session rated their Overall Juneau Experience highly, with 95 percent saying they were *satisfied* or *very satisfied* with their experience. However, the percentage of visitors *very satisfied* with their stay tended to decrease in proportion to the frequency of their Juneau travel. While some of the improvements suggested by legislative session business travelers are already in progress, including airport renovations and construction of a downtown parking facility, there are clearly more opportunities for Juneau to better serve those who use the capital city during the legislative session.

Demographics

The following section presents the demographics of survey participants. The survey focused on Alaska residents traveling to Juneau specifically for purposes attached to the legislative session, but captured all business travelers who were not Juneau residents.

Residency

Place of Residency	Percent
Anchorage	48%
Other Southcentral (Wasilla, Eagle River, Palmer, Homer, Kenai, Seward, Cordova, Talkeetna)	17%
Fairbanks	10%
Southeast	6%
The Rest of Alaska	4%
Outside Alaska	15%

Age

Age Group	Percent
18-24	2%
25-39	16%
40-54	45%
55-64	30%
65 and older	7%

Gender

Male	Female
69%	31%

Profession

Category	Percent
Legislator or Legislative Staff	14%
Other State Employee	21%
City or Federal Employee	10%
Private Sector Employee	32%
Non-Profit Employee	7%
Constituent	2%
Other	7%

Primary Trip Purpose

Business Purpose	Percent
Legislative or Session Business	36%
Other State Business	18%
Other Business	46%

Length of Specific Trip

Trip Length	Percent
1 day	21%
2 days	27%
3-5 days	27%
6-13 days	8%
Two weeks to two months	4%
Two months to four months	13%
Average Trip Length	16 days
Median Trip Length	3 days

Number of Visits to Juneau in Last 12 Months

Number of Visits	Percent
1 visit	23%
2 to 3 visits	25%
4-10 visits	23%
More than 10 visits	29%

Portion of Legislative Session Spent in Juneau

Time Spent in Juneau During 2009 Legislative Session	Percent
Less than a week	49%
A week to a month	23%
More than a month	28%

Accommodations

Accommodation	Percent
Hotel/Motel	66%
With Friends/relatives	23%
Rented apartment/condo/room/house	17%
Stayed with Friends or Relatives	8%
Bed and Breakfast	2%
Other (mostly people who did not stay in Juneau overnight)	7%

Transportation

Transportation Used	Percent
Rental Car	44%
Taxi	16%
Own Car	14%
Passenger in a Car	9%
Borrowed Car	7%
Hotel/Airport Shuttle	3%
Other	7%

Appendix I

Average Category Ratings by Subgroup

	Number in Subgroup	Overall Experience	Recreation	Meeting Facilities	Airport Facilities	Arts & Entertainment	Sightseeing & Attractions	Accommodations or Lodging	Restaurants	Transportation	Look and feel of Downtown Juneau	Shopping	Parking	Walking
Residency														
South Central	169	4.3	4.5*	4.1	3.6	4.4*	4.4*	4.0	3.9	4.0	3.9	3.7*	2.8	4.3
Rest of AK	46	4.1	4.5*	4.0	3.8	4.1*	4.4	4.0	4.0	4.1	4.0	3.7	2.7	4.2
Outside AK	40	4.3	4.5*	4.4*	3.9	4.8*	4.7	3.8	4.1	4.0	3.7	3.8*	3.2	4.0
Sector														
Public	120	4.2	4.5*	4.0	3.8	4.4*	4.4*	4.0	3.9	4.0	3.9	3.5*	2.8	4.3
Legislative	38	4.2	4.5*	4.1	4.0	4.4	4.4	4.2	3.7	3.9	3.7	3.3	2.9	4.4
Private	100	4.2	4.5*	4.3*	3.5	4.2*	4.6*	3.9	3.9	4.1	3.8	3.9*	2.9	4.1
Non-profit	18	4.3	4.4*	4.2	3.5	4.0*	4.4*	4.1	4.3	4.0	4.3	4.2	2.4*	4.1
Gender														
Male	175	4.2	4.6*	4.1	3.8	4.4*	4.5*	4.0	4.0	4.1	3.9	3.7*	2.9	4.2
Female	80	4.3	4.4*	4.1	3.4	4.3*	4.4*	4.0	3.8	3.9	3.9	3.7	2.7	4.3
Age														
Under 40	46	4.3	4.6*	3.8*	3.8	4.4*	4.7	4.1	3.9	3.9	3.9	3.8	2.7	4.4
40-54	118	4.2	4.4*	4.1	3.7	4.4*	4.4*	3.8	3.7	4.1	3.9	3.5*	2.8	4.2
55+	96	4.3	4.6*	4.2	3.6	4.2*	4.5*	4.1	4.2	4.0	3.9	4.0*	3.0	4.2
Primary Purpose														
Legislative	94	4.2	4.5*	4.1	3.7	4.3	4.4*	4.2	3.9	3.9	4.0	3.4	2.8	4.4
Other State Business	46	4.3	4.5*	4.0	3.8	4.3*	4.4*	3.9	4.1	4.1	4.0	3.9*	2.7	4.2
Other Business	120	4.2	4.5*	4.2*	3.6	4.4*	4.5*	3.8	3.9	4.0	3.8	4.0*	2.9	4.1
Frequency in 1 year														
1 Time	60	4.4	4.6*	4.2	3.8	4.4*	4.6	3.9	4.2	4.1	4.1	3.8*	2.9	4.3
2-10 Times	125	4.2	4.4*	4.2	3.7	4.4*	4.4*	3.9	3.9	3.9	3.8	3.8*	2.7	4.2
10 + Times	75	4.1	4.6*	4.0	3.6	4.3*	4.5*	4.2	3.9	4.1	3.9	3.6	3.0	4.2
Total Days of Session														
< 7 days	128	4.3	4.5*	4.2	3.7	4.2*	4.5*	3.9	4.0	4.1	4.0	4.0*	2.8	4.2
7-29 days	59	4.1	4.5*	4.0	3.6	4.5*	4.4*	3.8	3.9	3.9	3.9	3.7*	2.9	4.1
30 + days	73	4.2	4.5*	4.1	3.8	4.3*	4.5	4.3	3.8	4.0	3.8	3.4	2.8	4.4
Length of Trip														
< Week	201	4.2	4.4*	4.1	3.6	4.3*	4.5*	3.9	4.0	4.0	3.9	3.9*	2.8	4.2
1 Week +	59	4.3	4.6*	4.3	3.8	4.3	4.5	4.2	3.7	4.1	3.9	3.3	3.0	4.3
Total	260	4.2	4.5*	4.1	3.7	4.3*	4.5*	4.0	3.9	4.0	3.9	3.7*	2.8	4.2

Notes: Very Satisfied=5, Satisfied=4, Neutral=3, Dissatisfied=2, and Very Dissatisfied=1.

*More than 50 percent of respondents in these categories selected "Did Not Use" as their response, so the resulting sample sizes are smaller.

Appendix II: Legislative Session Visitor's Satisfaction Survey Instrument

Hi, my name is _____. We are conducting a visitor's satisfaction survey on behalf of the Alaska Committee and the Juneau Economic Development Council. The survey should take approximately five minutes. May I begin?

1. **Do you live in Juneau year round?** (If yes, thank and stop survey)
2. **What was your primary purpose for this visit to Juneau?**
 - a. Legislative or session business
 - b. Other state business
 - c. Other business
 - d. Other (If "d", thank and stop survey)
3. **How many days did you stay in Juneau on this specific trip?**
4. **What do you like most about visiting Juneau?**
5. **What do you like least about visiting Juneau?**
6. **Approximately how often did you visit Juneau in the last year?**
 - a. One time
 - b. 2 to 3 times
 - c. 4 to 10 times
 - d. More than 10 visits
7. **Approximately how long (altogether) will you spend in Juneau during this legislative session?**
 - a. Less than a week (1-6 days)
 - b. More than a week, less than a month (7 to 29 days)
 - c. More than a month, but not the entire session
 - d. Most or all of session

The following questions are regarding this specific visit to Juneau:

8. **Where did you stay during this visit?** (multiple answers acceptable)
- a. Hotel/motel
 - b. B&B
 - c. Rented apartment/condo/room
 - d. With friends/relatives
 - e. Other (please specify)_____
9. **Which forms of transportation did you use during this stay?** (check all that apply)
- a. Public bus
 - b. Taxi
 - c. Rented car
 - d. Borrowed car
 - e. Own car
 - f. Rode with friends/colleagues
 - g. Other (please specify)_____

10. **Using the following ratings: Very Satisfied, Satisfied, Dissatisfied, or Very Dissatisfied, please rate the following aspects of your Juneau visit.**

(Respondent may answer “neutral” or “did not use” but do not offer as responses.)

	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Neutral	Did Not Use
a. Overall Juneau Experience	5	4	2	1	3	6
b. Recreation (ski area, ice skating, hiking, camping, swimming)	5	4	2	1	3	6
c. Meeting facilities	5	4	2	1	3	6
d. Airport facilities	5	4	2	1	3	6
e. Arts and Entertainment (movie theaters, plays, concerts)	5	4	2	1	3	6
f. Sightseeing/Attractions	5	4	2	1	3	6
g. Accommodations or lodging	5	4	2	1	3	6
h. Restaurants	5	4	2	1	3	6
i. Transportation within Juneau	5	4	2	1	3	6
j. Look and feel of Downtown Juneau	5	4	2	1	3	6
k. Shopping	5	4	2	1	3	6
l. Parking	5	4	2	1	3	6
m. Walking	5	4	2	1	3	6

11. What improvement would make Juneau a better capital city?

Finally, we have some questions for demographic purposes:

12. Which best describes you? (Multiple answers acceptable, but do not suggest)

- a. Legislator
- b. Legislative staff or support position
- c. Lobbyist
- d. Other state worker
- e. Federal government worker
- f. City or tribal employee
- g. Private sector worker
- h. Non-Profit worker
- i. Constituent
- j. Other

13. Which age range describes you?

- a. 18 to 24
- b. 25 to 39
- c. 40 to 54
- d. 55 to 64
- e. 65 or older

14. In which town do you live?

- | | | |
|----------------|-------------|---------------|
| a) Anchorage | b) Bethel | c) Nome |
| d) Fairbanks | e) Palmer | f) Kotzebue |
| g) Juneau | h) Homer | i) Petersburg |
| j) Eagle River | k) Sterling | l) Seward |
| m) Sitka | n) Valdez | o) Dillingham |
| p) Ketchikan | q) Nikiski | r) Haines |
| s) Wasilla | t) Barrow | u) Cordova |
| v) Kenai | w) Soldotna | x) Wrangell |
| y) Kodiak | z) Unalaska | aa) Willow |

bb) Other – list community _____

15. Are you an Alaska resident?

- a. Yes
- b. No

16. Gender (Do not ask)

- a. Male
- b. Female

Thank you so much for participating in our survey, and have a great flight!