



JUNEAU VISITOR PROFILES

**PREPARED FOR:
JUNEAU CONVENTION
AND VISITORS BUREAU**



Research-Based Consulting

Juneau
Anchorage

January 2004

Exhibit KN
Page 1 of 40



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JUNEAU CONVENTION
AND VISITORS BUREAU***

PREPARED BY:



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To find out more about Juneau visitor markets, the Juneau Convention and Visitors Bureau contracted with the McDowell Group, an Alaska research firm with offices in Juneau and Anchorage, to provide summer 2003 visitor information from its proprietary visitor database, the *Alaska Travelers Survey*®.

This report includes three distinct but related surveys of Juneau summer 2003 visitors: the Juneau Cruise Visitor Custom On-Site Survey, the Juneau Air Visitor Custom On-Site Survey, and the Alaska Marine Highway On-Board Survey.

The custom survey samples included a total of 250 cruise visitors intercepted at the Juneau cruiseship dock and 300 air visitors intercepted at the Juneau Airport. The surveys included Juneau-specific questions developed for the Juneau Convention and Visitors Bureau. Several custom client questions were identical to survey questions asked in 2001, allowing the Juneau Convention and Visitors Bureau to compare data about visitors and the Juneau experience. The Alaska Marine Highway On-Board Survey collected information from 257 southbound ferry visitors, many of whom called at or overnighted in Juneau. Key findings are presented below.

Key Survey Findings and Trends

Since 2001, average per person expenditures in Juneau have decreased among air visitors, while average expenditures among cruise visitors have increased.

- ∞ Estimated cruise visitor expenditures in Juneau totaled \$175 per person in 2003. Average per person expenditures for tours and excursions were \$93, while all other expenditures averaged \$95 per person.
- ∞ Air visitor expenditures decreased 18 percent since 2001, from \$344 to \$281 due in part to a shorter average length of stay. Juneau air visitors reported spending a per person average of \$64 on tours, \$91 on accommodations, and \$141 on other items in Juneau during the 2003 summer season.

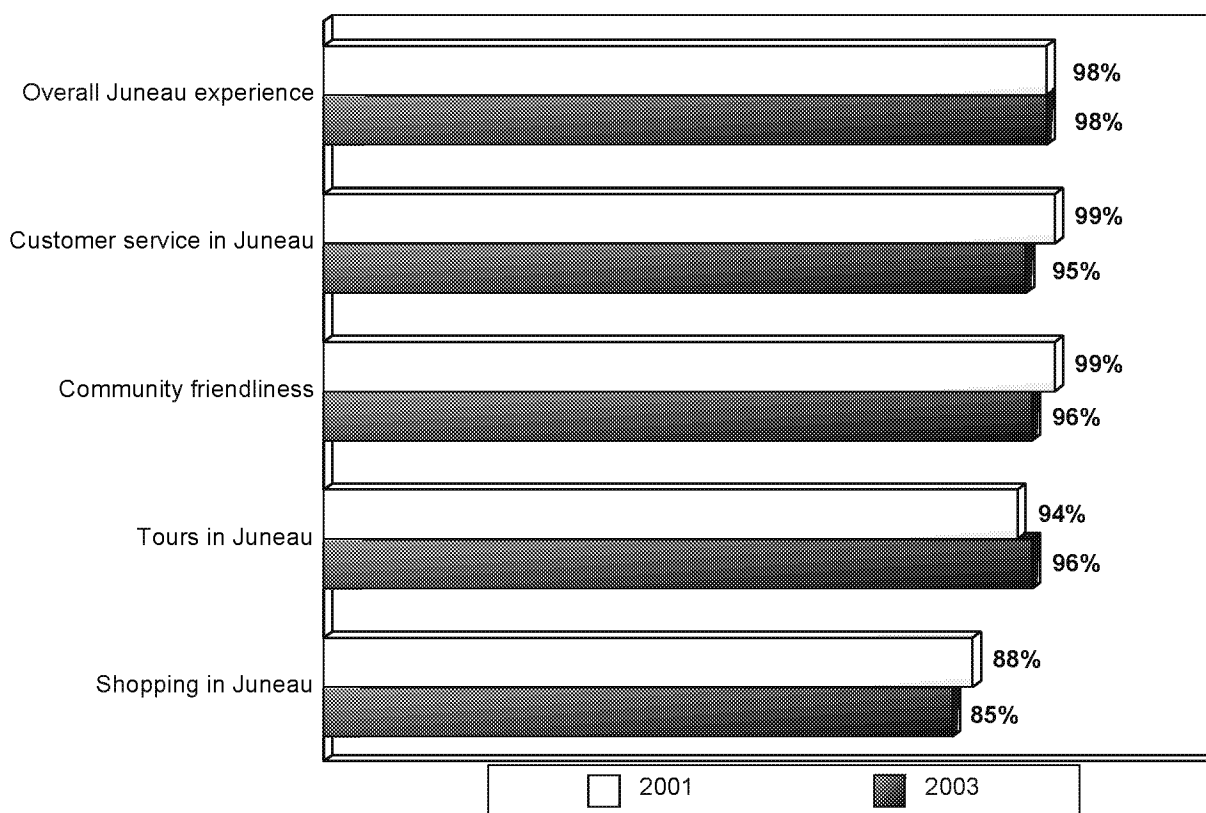
The Internet was the leading source of information for both cruise and air visitors.

- ∞ Sixty-eight percent of air visitors and 61 percent of cruise visitors used the Internet to plan their trip.
- ∞ In addition to the Internet, cruise visitors relied on traditional sources of information including travel agents, cruise lines, and friends and family. Air visitors tended to rely more often on friends and family and prior trip experience.

As in 2001, cruise passengers rate their experiences in Juneau very highly.

- ∞ Ratings for the overall Juneau experience remain high among cruise visitors, with 98 percent satisfied or very satisfied as in the 2001 survey.
- ∞ Customer service and community received slightly lower ratings than in 2001 but remain high, with over 95 percent of cruise visitors stating they are satisfied or very satisfied with these aspects of their Juneau experience.
- ∞ The percentage of cruise visitors who were satisfied or very satisfied with tours in Juneau increased slightly from 94 percent to 96 percent in 2003.

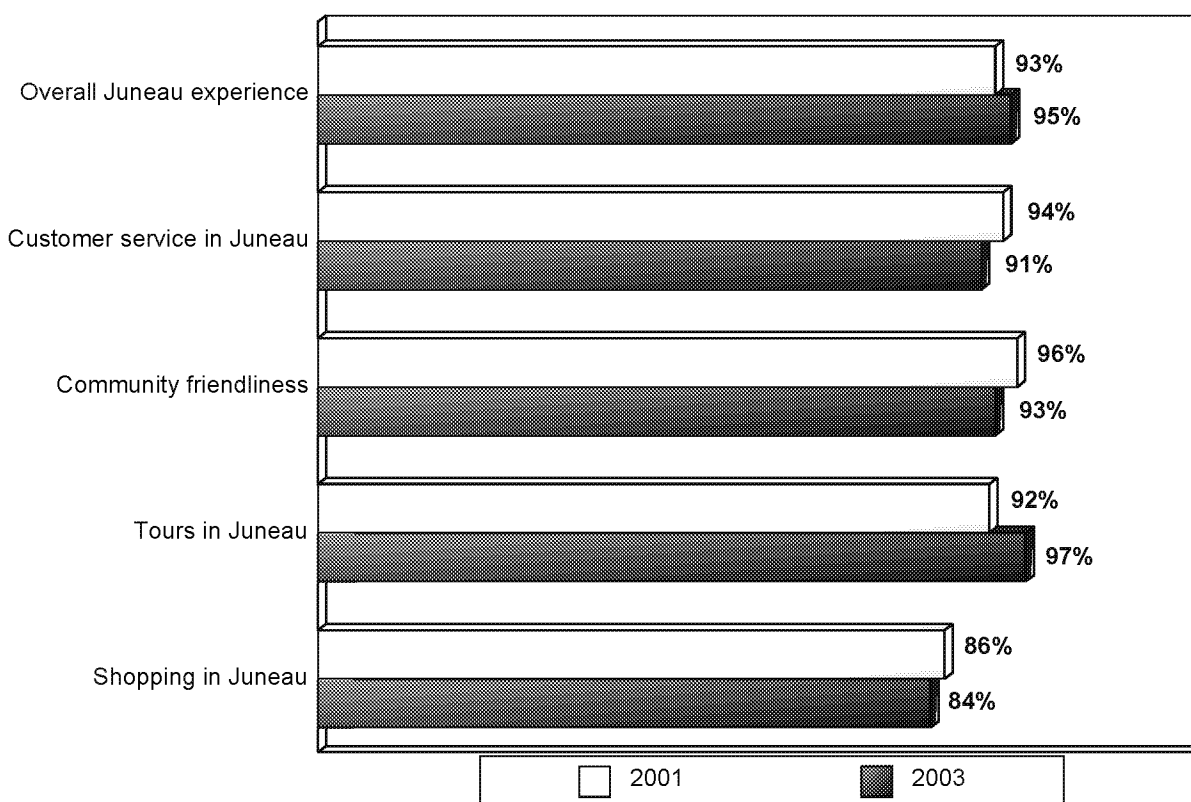
Cruise Visitor Satisfaction Ratings, 2001 versus 2003
Percent Satisfied or Very Satisfied
Alaska Travelers Survey 2003



Like cruise passengers, Juneau air visitors appear very pleased with all aspects of their Juneau experience.

- ∞ Air visitor ratings for the overall Juneau experience increased slightly since 2001, from 93 percent to 95 percent.
- ∞ Air visitors rated customer service in Juneau slightly lower than in the 2001 survey, 91 percent compared to 94 percent. Satisfaction ratings for community friendliness in Juneau declined the same amount, from 96 to 93 percent in 2003.
- ∞ There was an increase in the percentage of air visitors who were satisfied or very satisfied with tours offered in Juneau, from 92 percent to 97 percent since 2001.

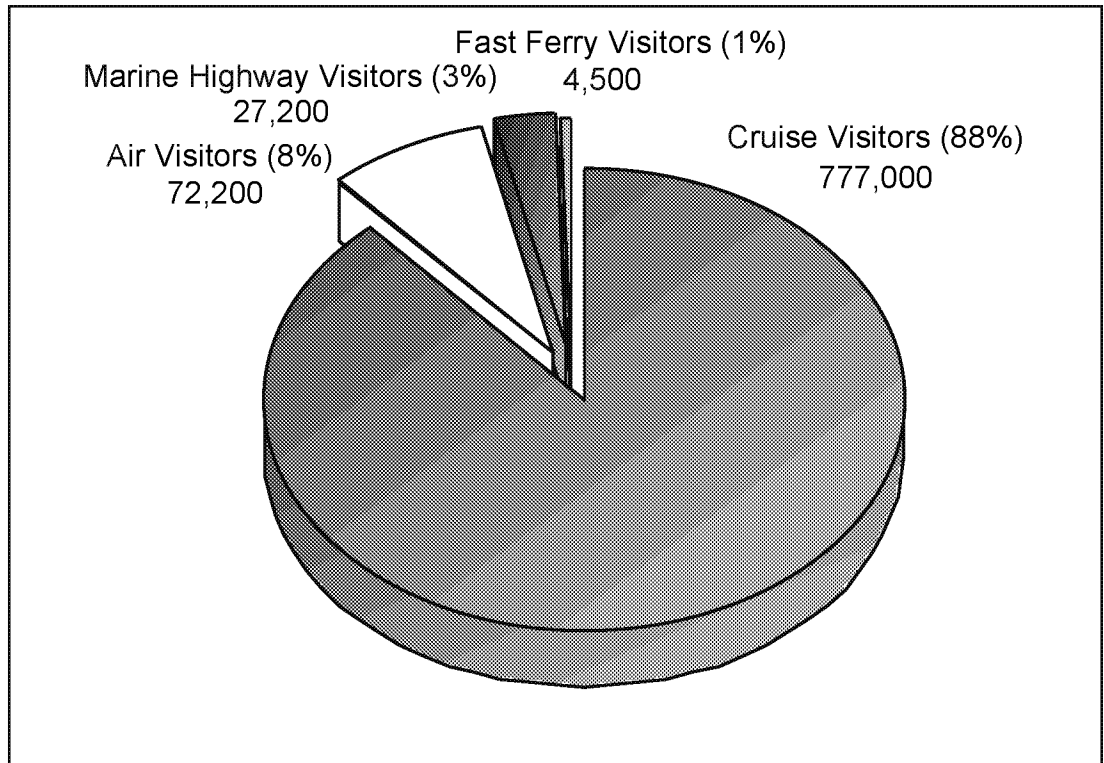
Air Visitor Satisfaction Ratings, 2001 versus 2003
Percent Satisfied or Very Satisfied
Alaska Travelers Survey 2003



Nearly 890,000 visitors came to Juneau between May and September of 2003, 88 percent via cruise ship.

- ∞ Cruise visitors totaled 777,000 in 2003, up about 8 percent from 2002.
- ∞ Air visitors represent 8 percent of the total visitor market at 72,200 arrivals. Alaska Marine Highway visitors represent 3 percent of the market (27,200 visitors), while fast ferry (day tour) arrivals represent 1 percent (4,500 visitors).

**Juneau Visitor Volume by Transportation Mode
May to September 2003**



INTRODUCTION AND METHODOLOGY

Introduction

To find out more about Juneau visitor markets, the Juneau Convention and Visitors Bureau contracted with the McDowell Group, an Alaska research firm based in Juneau, to provide summer 2003 visitor information from its proprietary visitor database, the *Alaska Travelers Survey*®.

The *Alaska Travelers Survey*® is an ongoing research program conducted in alternate years beginning in 2001. The program provides current information on Alaska visitor characteristics including satisfaction ratings, travel patterns, demographics and trip planning – all important to Alaska tourism marketing professionals.

In 2003, *Alaska Travelers Survey*® included 3,500 personal intercept interviews conducted statewide in eight locations. Pleasure visitors using all major transportation modes – air, cruise ship, ferry and highway – were interviewed. The program excludes Alaska residents, business visitors and seasonal employees.

Methodology

Juneau was a key interviewing location for the *Alaska Travelers Survey*®. Visitors were surveyed on three transportation modes: air, cruise ship, and the Alaska Marine Highway. Visitors were interviewed by McDowell Group staff as they departed Juneau. Exit interview methodology provides excellent trip information, since the trip is still fresh in the visitor's mind.

Juneau Cruise Visitor Custom On-Site Survey

This report includes three distinct but related surveys of Juneau summer 2003 visitors. The first is the Juneau Cruise Visitor Custom On-Site Survey. Using a statistical sampling procedure to randomly select voyages throughout the season, McDowell Group surveyors intercepted 250 cruise visitors at the Juneau cruiseship dock during the summer of 2003. While this survey collected information related to McDowell Group's statewide ATS survey, the custom survey primarily consists of questions specifically developed for the Juneau Convention and Visitors Bureau to better understand the Juneau visitor market. Both northbound and southbound cruisers were interviewed to ensure appropriate sampling of characteristics, ratings, and spending patterns of all cruise visitors.

Juneau Air Visitor Custom On-Site Survey

The Juneau Air Visitor Custom On-Site Survey was administered to 300 air visitors at the Juneau Airport. Air visitors were asked a number of Juneau-specific questions in addition to the series of statewide ATS questions normally included in the survey. In addition to the full sample of southbound departing visitors, a special portion of the sample was devoted to sampling northbound visitors who were not on their last day of travel in Alaska. This allowed a representative sample and gave the study

team confirmation that northbound visitors closely resemble southbound visitors in virtually all respects. The single difference was that northbound travelers were less likely to be in Juneau visiting friends and relatives, an understandable finding given the tendency of those who visit friends and relatives to focus their trip primarily on one or two communities.

Alaska Marine Highway Onboard Visitor Survey

While a specific Juneau Alaska Marine Highway survey was not administered, this report includes a profile of Alaska Marine Highway visitors traveling in the region in summer 2003. This section of the report profiles an onboard sample of 257 southbound ferry visitors, many of whom called at or overnighted in Juneau. The purpose of this chapter is to provide insights into the ferry market so that the JCVB can more effectively increase their market share. The specific methodology involved a very tightly controlled statistical sample of visitors on a variety of ships and routes and accurately represents the full population of southbound ferry visitors.

Juneau Visitor Arrival Estimate

Part of this research effort involved developing an accurate estimate of all summer 2003 visitors to Juneau. Several methods were used and they include detailed visitor/ resident tallies of over 1,000 departing air visitors, previously researched visitor/ resident ratios on all major Alaska Marine Highway route links to and from Juneau, advance internal data on Alaska Marine Highway passenger traffic, documentation of private fast ferry volumes arriving in Juneau, and detailed tallies of passenger volumes aboard each ship arriving in Juneau in summer 2003.

Purpose of Trip

Air visitors come to Juneau primarily for pleasure. In 2003, two out of three Juneau air visitors were vacation/ pleasure visitors. One-quarter of air visitors were in Juneau visiting friends and relatives, a slight decrease in the percentage of air travelers visiting friends and relatives in 2001 (27 percent). One in ten air visitors combined business and pleasure on their trip to Juneau, increasing from 8 percent in 2001. Virtually 100 percent of cruise visitors traveled to Alaska for vacation/ pleasure.

Length of Stay

The average length of stay for air visitors has decreased since 2001. Air visitors spent an average of 9.7 nights in Alaska, decreasing from 10.5 nights in the 2001 survey. The average length of stay for air visitors varies significantly by trip purpose. Those travelers combining business and pleasure stayed an average of 11.8 nights compared to 14.9 nights in 2001, while those primarily visiting friends and relatives stayed an average of 11 nights, decreasing from 14.1 nights. Vacation/ pleasure visitors, representing the largest percentage of the air visitor market, had the shortest visits to Alaska, spending an average of 8.8 nights (compared to 8.5 nights in 2001).

Air visitors spent more than half of their Alaska trip in Juneau. Air travelers stayed an average of 5.6 nights in Juneau compared to 7.2 nights in 2001. Those visiting friends and relatives had longer stays (9.8 nights) than those visiting Juneau on business/ pleasure (5.1 nights) or vacation (3.6 nights). This is a significant decrease in length of stay in Juneau since 2001 for all air travelers.

**Length of Stay in Number of Nights
Juneau Air Visitor Custom On-Site Sample
Alaska Travelers Survey 2003**

Trip Purpose	Length of Stay 2003	Length of Stay 2001
Average length of stay in Alaska (number of nights)		
All Air Visitors	9.7	10.5
Vacation/pleasure	8.8	8.5
Visiting friends and relatives	11.0	14.1
Business/pleasure	11.8	14.9
Average length of stay in Juneau (number of nights)		
All Air Visitors	5.6	7.2
Vacation/pleasure	3.6	4.2
Visiting friends and relatives	9.8	12.5
Business/pleasure	5.1	12.2

Participation in Tours and Activities in Juneau

Cruise Visitor Participation

The majority of cruise visitors (76 percent) participated in at least one tour while in Juneau. The most common tours cruise visitors participated in were glacier tours, riding the Mt. Roberts Tramway, city tours, day cruises, and helicopter flightseeing. Ninety-five percent of cruise visitors who participated in Juneau tours claimed they were satisfied or very satisfied with their experiences.

Visitors tended to book excursions, especially those with limited capacity, such as glacier tours, day cruises, and helicopter flightseeing, in advance of their arrival in Juneau. Cruise visitors were more likely to pay for tramway tickets, city tours, and museum admission after their arrival in Juneau.

Cruise Visitor Participation in Juneau Tours/Shore Excursions Juneau Cruise Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Tours/Shore Excursions	Participation	Tour Purchased:		
		Before Departure	During Cruise	After Arrival
Glacier tour	36%	42%	24%	35%
Tramway	24	18	24	58
City tours (bus/van)	21	26	34	41
Day cruise	15	59	36	6
Helicopter flightseeing	13	70	26	3
Salmon bake	8	55	30	15
Museums/historical sites	7	2	8	90
Wildlife viewing tour	7	29	48	23
Rafting	5	73	28	0
Small plane flightseeing	5	79	21	0
DIPAC hatchery	4	61	0	39
Gold panning/mine tour	3	0	100	0
Fishing	3	58	16	26
Hiking/nature walk	2	33	47	19
Botanical/Glacier Gardens	1	0	100	0
City walking tour	1	0	47	47
Dog sledding	1	87	13	0
Kayaking	1	0	100	0
No answer	34	NA	NA	NA
Other	3	74	23	0

Air Visitor Participation

Air visitors are more likely than cruise visitors to participate in unguided activities including shopping, hiking, fishing, touring museums, and visiting friends and family. Over one-half of air visitors participated in hiking. About four in ten visitors participated in sportfishing (guided and unguided) during their visit to Juneau.

Air Visitor Participation in Juneau Tours and Activities Juneau Air Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Activities	Air Visitor Participation
Shopping	74%
Hiking/nature walk	59
Museums	47
Tramway/gondola	37
Visiting friends/family	33
City tour	32
Fishing (unguided)	26
Day cruise	25
Wildlife/marine life viewing	23
Photography	22
Boating	16
Fishing (guided)	15
Flightseeing (helicopter)	12
Bear viewing	10
Bird watching	10
Business	8
Flightseeing (small plane)	8
Kayaking/canoeing	7
Camping	5
Gold panning/mine tour	4
Rafting	3
Native culture tours/activities	2
Biking	2
Hunting	1
Other activities	9

Accommodations

The majority of air visitors who overnighted in Juneau stayed in hotels/ motels and private homes. Air visitors who chose hotel/ motel accommodations had the shortest average length of stay (2.8 nights) compared to all other lodging choices.

Air Visitor Accommodations and Average Length of Stay Juneau Air Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Lodging Type	Air Visitors	Average Number of Nights
Hotel/motel	54%	2.8
Private home	32	9.8
B&B	6	4.1
Lodge Resort	3	3.2
Camping - tent/cabin	3	3.4
Other	3	5.2

Visitor Expenditures in Juneau

Cruise Visitor Expenditures

Estimated cruise visitor expenditures have increased since 2001, due in part to refinements in the survey methodology and the calculation of per person average expenditures.

Reported total spending by cruise visitors averaged \$175 per person in 2003. Average per person expenditures for tours and excursions was \$93 in 2003 compared to \$87 in 2001. All other expenditures averaged \$95 per person compared to \$64 in 2001.

The reason that the average of tour/ excursion expenditures plus the average of other expenditures does not equal total expenditures is because each figure is based on a slightly different survey population. The discrepancy results from "don't know" responses. A respondent that answered "don't know" to one question may not have answered "don't know" to the other question, and vice versa. This leads to a different base for the total expenditure figure, and an overall average that is not the exact sum of the averages from the two expenditure figures. The same issue existed in the 2001 expenditure data, as well.

Cruise Visitor Expenditures in Juneau Juneau Cruise Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Expenditures*	Tours and Excursions	All Other Expenditures	Total Expenditures
Zero	19%	12%	5%
\$1 to \$50	14	30	14
\$51 to \$100	9	16	10
\$101 to \$200	14	14	15
\$201 to \$500	20	11	27
Over \$500	12	6	24
Don't know	12	11	5
Average Expenditures			
Per Party	\$253	\$213	\$432
Per Person	\$93	\$95	\$175

*Expenditures include tours purchased before and after arrival plus any other expenses.

Air Visitor Expenditures

Air visitor expenditures in Juneau averaged \$281 per person, compared to \$344 per person in 2001. With an average party size of 2.2 people, air party expenditures were \$538, down from \$688 in 2001. Reduced expenditures are likely related to the shorter average trip lengths observed in the 2003 survey.

Air visitors were asked to estimate how much their traveling party spent on tours, accommodations, other expenditures, and the total amount spent in Juneau. Average per party and per person expenditures include those visitors who did not spend anything on that aspect of the Juneau experience. The average total expenditures are slightly lower than the sum of reported expenditures for tours, accommodations, and other activities in Juneau.

Air Visitor Expenditures in Juneau* Juneau Air Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Expenditures	Tours	Accommodations	Other Expenditures	Total Expenditures
Zero	55%	47%	16%	14%
\$1 to \$100	13	7	28	17
\$101 to \$250	7	11	20	17
\$251 to \$500	5	12	15	15
\$501 to \$1,000	1	4	8	17
Over \$1,000	2	2	2	10
Don't know	17	17	11	9
Average Expenditures				
Per Party	\$129	\$173	\$253	\$538
Per Person	\$64	\$91	\$141	\$281

*Not including pre-paid expenditures.

Air Visitor Expenditures by Trip Purpose

Vacation/pleasure visitors typically spent more than those visiting friends and relatives in Juneau, \$606 compared to \$413 per party. Vacation/pleasure visitors spent an average of \$168 per night, while those visiting friends and relatives had longer stays in Juneau and spent an average of \$42 a night.

Air Visitor Expenditures in Juneau by Trip Purpose Juneau Air Visitor Custom On-Site Sample Alaska Travelers Survey 2003

Expenditures*	Tours	Accommodations	Other Expenditures	Total Expenditures
Vacation/Pleasure Visitors				
Zero	49%	40%	17%	16%
\$1 to \$100	15	8	32	16
\$101 to \$250	10	12	19	17
\$251 to \$500	4	9	13	15
\$501 to \$1,000	1	6	6	16
Over \$1,000	3	3	3	11
Average party expenditure	\$172	\$209	\$243	\$606
Expenditure per night (3.6 nights)	\$48	\$58	\$68	\$168
Visiting Friends and Relatives				
Zero	70%	68%	13%	11%
\$1 to \$100	10	5	22	22
\$101 to \$250	2	10	16	16
\$251 to \$500	8	8	17	16
\$501 to \$1,000	0	0	16	14
Over \$1,000	2	2	2	11
Average party expenditure	\$57	\$85	\$309	\$413
Expenditure per night (9.8 nights)	\$6	\$9	\$32	\$42

*Not including pre-paid expenditures.

Previous and Future Alaska Travel

The majority of cruise visitors are first-time visitors to Alaska. Air visitors are much more likely to be return visitors to the state, with 63 percent reporting that they had visited Alaska previously. This is a significant increase in the percentage of return visitors traveling by air. In 2001, only 49 percent of air visitors had previously visited Alaska.

Air visitors who have previously been to Alaska averaged 7 trips compared to 6.8 trips in 2001. Sixty-four percent of air visitors stated they are very likely to return to Alaska compared to 30 percent of cruise visitors.

Of the visitors who have been to Alaska before, 59 percent of cruise visitors and 79 percent of air visitors have previously been to Juneau.

Seventy-seven percent of air visitors stated they are very likely to return to Juneau compared to 51 percent of cruise visitors. Among cruise visitors who stated they were likely to return to Juneau, reasons they would like to return include the scenic beauty, the positive experience, the desire to spend more time, Juneau's position as a regional hub, to view glaciers, and to bring others.

Past and Future Travel Juneau Cruise and Air Visitor Custom On-Site Samples Alaska Travelers Survey 2003

	Cruise Visitors	Air Visitors
Is this your first trip to Alaska?		
Yes	83%	37%
No	17	63
Is this your first trip to Juneau? (Base: Not first trip to Alaska)		
Yes	41%	21%
No	59	79
How likely are you to return to Alaska?		
Very Likely	29%	64%
Likely	26	21
Unlikely	20	7
Very Unlikely	8	3
How likely are you to return to Juneau? (Base: Very likely to return to Alaska)		
Very Likely	51%	77%
Likely	29	14
Unlikely	7	4
Very Unlikely	0	1

Transportation Modes Used

Both cruise and air visitors tend to use the same transportation modes on return visits. Almost one-half of the cruise visitors who are return visitors to Alaska entered or exited Alaska by cruise ship on their last visit, while 35 percent had previously entered or exited Alaska by air. Fourteen percent of cruise visitors used the highway on their last visit, and 6 percent used the state ferry.

The vast majority of air visitors (91 percent) traveled by air on their last visit to Alaska. Only 5 percent of air visitors had visited Alaska by cruise ship on their previous trip. The same proportion of air visitors used the highway system as used the state ferry (2 percent apiece).

Previous Transportation Mode Juneau Cruise and Air Visitor Custom On-Site Samples Alaska Travelers Survey 2003

Transportation Mode	Cruise Visitors	Air Visitors
On your last visit, what mode of transportation did you use to enter/exit Alaska? (Base: Not first trip to Alaska)		
Cruise	47%	5%
Air	35	91
Highway	14	2
Ferry (AMHS)	5	2
Other	6	2

Overnight Locations

While Juneau's position as a regional hub attracts many visitors, local marketing efforts have the potential to impact visitors who are only passing through the Juneau airport en route to another destination. One-third of air visitors departing the Juneau airport did not overnight in Juneau. Other communities in Southeast of interest to Juneau air visitors include Glacier Bay/ Gustavus, Skagway, Haines, Petersburg, and Sitka. Anchorage/ Eagle River was an overnight destination for about one in ten air visitors. Slightly more than one in ten air visitors interviewed at the Juneau airport spent a night onboard a cruise ship during their visit to Alaska.

Overnight Locations
Juneau Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Locations	Air Visitors
Juneau/Douglas	67%
Cruiseship	11
Glacier Bay/Gustavus	10
Skagway	10
Anchorage/Eagle River	9
Boat	8
Haines	7
Petersburg	7
Sitka	7
Denali	6
Ferry (AMHS)	5
Ketchikan	3
Fairbanks/North Pole	3
Seward	3
Wrangell	2
Tok	2
Kenai/Soldotna	1
Homer	0
Kodiak	0
Talkeetna	0
Valdez	0
Other Southeast Alaska	16
Other Southcentral Alaska	1
Other Interior	0
Other Far North	0

Visitor Satisfaction with Alaska Experiences

Cruise and air visitors are pleased with their overall experience in Alaska. Ninety-six percent of cruise visitors and 99 percent of air visitors said they were satisfied or very satisfied with their overall experience. Wildlife viewing scored lower ratings among cruise visitors, with 68 percent reporting they were satisfied or very satisfied. Ninety-four percent of air visitors rated themselves satisfied or very satisfied with wildlife viewing.

As in 2001, cruise and air visitors continue to express a high degree of satisfaction with their overall experience in Juneau. However, there was a slight drop in satisfaction ratings for customer service and community friendliness. Ninety-five percent of cruise visitors were satisfied or very satisfied with the customer service they received, compared to 99 percent in 2001. Air visitors also rated customer service slightly lower, decreasing from 94 percent to 91 percent since 2001.

The majority of cruise and air visitors and were satisfied or very satisfied with tours offered in Juneau. Eighty-five percent of cruise visitors and 84 percent of air visitors rated themselves satisfied or very satisfied with shopping in Juneau.

Cruise and Air Visitor Satisfaction Ratings
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Average 1-5
Cruise Visitors						
Overall experience in Alaska	66%	31%	3%	0%	0%	4.6
Wildlife viewing	32	35	25	5	1	3.9
Overall experience in Juneau	63	35	2	0	0	4.6
Customer service	65	30	5	1	0	4.6
Community friendliness	69	27	4	0	0	4.7
Tours offered in Juneau	69	27	4	1	0	4.6
Shopping in Juneau	50	35	12	2	0	4.3
Air Visitors						
Overall experience in Alaska	81%	18%	2%	0%	0%	4.8
Wildlife viewing	73	21	5	2	0	4.6
Overall experience in Juneau	74	21	4	0	0	4.7
Customer service in Juneau	60	31	8	1	0	4.5
Community friendliness	73	20	6	0	0	4.7
Tours offered in Juneau	76	21	2	0	0	4.7
Shopping in Juneau	45	39	13	3	0	4.3

Most Enjoyable Juneau Experiences

One in three cruise visitors reported scenery/ sightseeing as the experience they most enjoyed about Juneau. This is a significant increase since 2001, when one in five cruise visitors reported scenery/ sightseeing as their favorite Juneau experience. Glaciers were mentioned by one in five cruise visitors as their most enjoyable Juneau experience. Cruise visitors also listed many of the tours offered in Juneau as the experiences they most enjoyed, including whale watching tours and flightseeing.

Air visitors gave the highest ratings to scenery/ sightseeing, visiting friends and family, viewing glaciers, and touring museums/ historical sites.

Cruise visitor responses mentioned by less than one percent are grouped together in the "other" category. These include dog sledding on the glacier, the Bike and Brew tour, salmon bake, eagles, and seeing salmon runs. Air visitor comments included in the "other" category are Glacier Gardens, wildlife viewing, DIPAC, and the relaxed atmosphere.

Most Enjoyable Juneau Experiences
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Enjoyed Most	Cruise Visitors	Air Visitors
Scenery/sightseeing	34%	23%
Glaciers	20	10
Whale watching tour	8	1
Flightseeing	6	1
Shopping	5	2
Museum/historical sites	3	6
Weather	3	1
Mt. Roberts Tramway	3	1
Rafting	3	0
People	2	3
Kayaking	1	0
Friends and family	1	13
Fishing	1	7
Hiking	1	3
Other*	8	11

*All "other" experiences were mentioned by less than 1% of respondents.

Least Enjoyable Juneau Experiences

The most frequent response from visitors about what they enjoyed the least about Juneau was “nothing.” The weather was the second most common response. Fewer cruise visitors expressed dissatisfaction with the weather than in 2001, when almost one-quarter of cruise visitors ranked the weather as their least enjoyed Juneau experience.

Six percent of cruise visitors reported that they did not have enough time in port. This was reported by less than one percent of cruise visitors in 2001.

Comments made by less than one percent of respondents are grouped in “other.” Cruise visitor responses in “other” include dissatisfaction with tour options, not enough restaurants and public bathrooms, and litter in the street. Air visitor comments in “other” include poor food quality, airport security, and cars failing to stop for people in the street.

Least Enjoyable Juneau Experiences
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Enjoyed Least	Cruise Visitors	Air Visitors
Nothing	54%	31%
Weather	11	14
Not enough port time	6	NA
Crowded/too many tourists	4	6
Shops are too touristy	3	3
Too much walking (dock too far away from town)	3	0
Retail prices	2	2
Tour prices	2	1
Poor customer service	1	3
Transportation	0	2
Food prices	1	3
Other*	7	15

*All “other” experiences were mentioned by less than 1% of respondents.

Why Visitors Chose Juneau as Their Destination

Juneau serves as a regional hub for other Southeast destinations. Over one-quarter of air visitors (29 percent) stated they were passing through the area en route to another destination and did not plan to participate in any activities in Juneau. About one in five air visitors were in Juneau primarily to visit friends and relatives. Thirteen percent of air visitors came to Juneau for sportfishing, while the same number came because a friend or relative had recommended Juneau.

Why Visitors Chose Juneau as Their Destination
Juneau Air Visitor Custom On-Site Sample
Alaska Travelers Survey 2003

	Air Visitors
Passing through	29%
Visiting friends/relatives	19
Fishing	13
Friend/relative recommended	13
Part of tour package	9
Always wanted to visit Juneau	8
Glacier Bay/Glaciers	3
Outdoors/wilderness	2
Wildlife/marine life viewing	2
Day cruise	1
Other planned trip	1
Other	9

Information Sources About Juneau

The Internet is the source most commonly used by both cruise and air visitors to locate information about Juneau. One-third of cruise visitors relied on information provided by cruise lines. Just over one-third of cruise visitors used travel agents to find information about Juneau compared to only 6 percent of air visitors.

Air visitors were more likely than cruise visitors to report friends and family as an important source of information about Juneau. Air visitors were also more likely to rely on information from prior trip experiences, and much less likely to use travel agents.

Information Sources
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Information Source	Cruise Visitors	Air Visitors
Internet	38%	41%
Travel agent	34	6
Cruise line	33	2
Friends and family	21	40
Brochures	16	7
Prior trip experience	8	26
AAA	7	2
Books	6	0
Library	2	0
Frommer's Guide	2	2
CVB's	2	0
Magazine articles	2	2
Ferry brochure/schedule	1	2
Travel shows	1	1
Lonely Planet	0	1
Milepost	0	2
Newspapers	0	1
None	4	15
Other	3	5

"Top of mind" recall.

Planning and Booking Travel Arrangements

Use of the Internet

Use of the Internet to research and book travel arrangements has increased significantly among cruise passengers since 2001. When asked specifically about online research and booking, 61 percent of cruise visitors reported they had used the Internet to research or book part of their Alaska trip, an increase from 49 percent in 2001. Internet usage among air visitors for research and booking remained constant from 2001 at 68 percent.

While use of the Internet for research and booking is common for both cruise and air visitors, nearly one-third of all visitors do not use the Internet and should be contacted by traditional marketing means.

Among cruise visitors who used the Internet to book a portion of their trip, 60 percent booked tours, 33 percent booked cruise passage, 28 percent booked airfare, 15 percent booked lodging, and 3 percent booked car rentals. The majority of Internet bookings made by air visitors were for purchase of airline tickets (96 percent), followed by lodging (29 percent).

Internet Use
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

	Cruise Visitors	Air Visitors
Did Not Use Internet	36%	32%
Used Internet	61	68
Research only	34	24
Research and booked	27	43
Portion of travel booked through Internet (Base: Booked trip online)		
Tours	60%	8%
Cruise	33	1
Airfare	28	96
Lodging	15	29
Vehicle rental	3	10
Ferry	0	7

Trip Decision Timing

Both cruise and air visitors were asked, "How far in advance did you decide to come on this trip to Alaska?" Cruise visitors tended to make their decision well in advance of their departure. While the largest percentage of cruise visitors (38 percent) made their decision seven months or more in advance, marketing remains important throughout the tourist season. Almost one-third of cruise visitors (28 percent) decided to visit Alaska three months or less before departure. A similar percentage of cruise visitors (34 percent) made the trip decision four to six months prior to departure.

Air visitors tend to decide on their Alaska trip much closer to departure than cruise visitors; therefore, diverse marketing approaches should be considered in order to impact all potential visitors. Forty-four percent of air visitors decided to visit Alaska three months or less before departure compared to 50 percent in 2001. Twenty-seven percent decided on the trip four to six months prior to departure. Thirty percent of air visitors decided on the trip seven months or more in advance.

Trip Decision Timing
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Advance Planning	Cruise Visitors	Air Visitors
1 month	5%	18%
2 months	11	17
3 months	12	9
4 months	5	5
5 months	9	7
6 months	20	15
7 to 12 months	31	25
Over 1 year	7	5
Average	8.0 months	6.4 months

Travel Arrangements Timing

Cruise visitors tend to book their travel arrangements at about the same time they begin trip planning. Over one-third of cruise visitors booked their major travel arrangements within 90 days of travel. A similar number of cruise visitors (38 percent) booked their trip four to six months in advance. More than one-quarter of cruise visitors booked their trip more than seven months before departure. Among cruise visitors who used the Internet to book a portion of their trip, 60 percent booked tours, 33 percent booked cruise passage, 28 percent booked airfare, 15 percent booked lodging, and 3 percent booked car rentals.

Almost two-thirds of air visitors (63 percent) booked their major travel arrangements three months or less before departure. One-third of air visitors booked within 30 days of their departure date, compared to 27 percent in 2001. One-quarter of air visitors booked four to six months in advance. Approximately one in ten air visitors booked their travel arrangements more than seven months in advance.

Travel Arrangements Timing
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

Advance Booking	Cruise Visitors	Air Visitors
1 month	6%	33%
2 months	13	19
3 months	17	11
4 months	8	6
5 months	12	7
6 months	19	12
7-12 months	24	11
Over 1 year	1	0
Average	5.3 months	3.5 months

Visitors from the Western U.S. continue to be an important part of cruise and air markets. The cruise market continues to draw from a broad geographic area.

Approximately one in six cruise visitors is an international visitor (16 percent). The largest international market for cruise travel to Alaska is Canada, representing 11 percent of the market.

Juneau Visitor Origin
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

	Cruise Visitors	Air Visitors
Western US	22%	58%
California	10	14
Washington	3	22
Southern US	27	15
Midwestern US	22	13
East	14	11
Canada	11	1
Other International	5	2

The largest percentage for both cruise and air visitors falls between the ages of 45 and 64, indicating that many visitors to Alaska are still in the workforce.

The average party size of cruise visitors at 2.8 people is slightly larger than for air visitors at 2.2 people. Air visitors are more likely to travel alone, with almost one-third compared to only 6 percent of cruise visitors traveling alone.

The average visitor to Alaska is well-educated, with 53 percent of cruise visitors and 62 percent of air visitors having completed advanced degrees.

There is a significant decrease in the median household income among cruise visitors, from \$100,000 in 2001 to \$88,000. However, this decrease could be due to a change in methodology for this question in the 2003 survey designed to better account for upper income ranges.

Median household income for air visitors increased from \$65,000 in 2001 to \$88,000. Those visiting Juneau primarily for vacation/pleasure average household income was \$125,000, compared to \$68,000 for air visitors primarily visiting friends and relatives.

Juneau Visitor Demographics
Juneau Cruise and Air Visitor Custom On-Site Samples
Alaska Travelers Survey 2003

	Cruise Visitors	Air Visitors
Party Size		
One person	6%	32%
Two people	66	48
Three people	10	7
Four people	9	7
Five or more people	10	6
Average party size	2.8 people	2.2 people
Gender		
Male	44%	58%
Female	56	42
Age		
19-34 years old	7%	12%
35-44 years old	9	12
45-64 years old	50	44
Over 65 years old	30	24
Education		
High school diploma/GED	30%	20%
Vocational certificate	5	4
AA (Associate's Degree)	8	10
College Graduates	53	62
Bachelor's Degree	31	34
Master's Degree	17	22
Doctorate	5	6
Household Income		
Under \$35,000	5%	9%
\$35,000 to \$50,000	8	10
\$50,001 to \$75,000	16	14
\$75,001 to \$100,000	21	11
\$100,001 to \$150,000	12	14
Over \$150,000	14	19
Median Income	\$88,000	\$88,000
Vacation/Pleasure	\$88,000	\$125,000
Visiting Friends/Family	NA	\$68,000
Refused	21%	20%

ALASKA MARINE HIGHWAY MARKET PROFILE

Methodology

McDowell Group conducted a total of 257 surveys onboard the AMHS ferries between July and September 2003. Vessels included the Columbia, Taku, Kennicott, and Malaspina. The sample plan was designed to capture a representative sample of visitors exiting Alaska via Prince Rupert and Bellingham.

The surveys included visitors traveling for vacation/ pleasure, those visiting friends and relatives, and visitors combining business and pleasure. Alaska residents and business-only travelers were excluded. Pleasure travelers are more likely to be impacted by AMHS marketing efforts and are an important source of revenue for many visitor industry related businesses.

Trip Planning

Information Sources

Visitors traveling onboard the Alaska Marine Highway relied on many sources of information for trip planning purposes. Two-thirds used the Internet as a source of information about Alaska, up from 52 percent in 2001. Friends and family continue to be a valuable source of information for visitors. One-half relied on friends and family for information. Visitors also relied on information from prior experiences in Alaska.

There is an increase in the use of guidebooks; the most frequently named guidebook was the Milepost, used by almost three of every ten respondents (28 percent). Other brochures were used by 31 percent of respondents. There is also a significant increase in the use of the ferry brochure/ schedule, from 8 percent in 2001 to 31 percent.

Sources of Information about Alaska Alaska Marine Highway Onboard Visitor Survey Alaska Travelers Survey 2003

	% of Total
Internet	66%
Friends/Family	50
Guidebooks	45
Milepost	28
Lonely Planet	8
Other Travel guidebook	6
Frommer's Guide	3
Prior Experience	39
Ferry brochure/schedule	31
Brochures	31
AAA	14
Magazine	12
Travel Agent	9
Library	9
Convention and Visitors Bureau	9
Alaska State Vacation Planner	7
Community Brochures	5
Travel Shows	4
North to Alaska	3
Newspapers	2
Cruise line	2
Clubs	1
Other	4

Planning and Booking Travel Arrangements

Fewer visitors planned their trip more than 12 months in advance than in 2001, decreasing from 24 percent to 5 percent. The percentage of visitors who planned their trips three months or less in advance increased from 31 percent to 35 percent. Almost one-third of visitors (29 percent) planned their trip four to six months prior to departure. A similar percentage (31 percent) decided to visit Alaska seven to twelve months before departure.

Timing of Trip Planning Alaska Marine Highway Onboard Visitor Survey Alaska Travelers Survey 2003

	% of Total
Three months or less	35%
4-6 months	29
7-12 months	31
More than 12 months	5

Nearly two-thirds of respondents booked their major travel arrangements three months or less in advance. Indicating the importance of continued marketing in the spring, 45 percent of 2003 visitors booked one month or less before travel. Seven percent booked less than one month before their trip. One-quarter of visitors booked their arrangements four to six months prior to departure. Twelve percent booked their arrangements more than seven months in advance.

Timing of Trip Booking Alaska Marine Highway Onboard Visitor Survey Alaska Travelers Survey 2003

	% of Total
Three months or less	63%
4-6 months	25
7-12 months	12
More than 12 months	0

Overnight Locations

When visitors were asked about overnight locations throughout Alaska, the most frequently named community was Anchorage/ Eagle River, followed by Juneau. Ferry visitors spent an average of 2.7 nights in Juneau/ Douglas in 2003. One-fifth of respondents visited Ketchikan.

Overnight Locations Alaska Marine Highway Onboard Visitor Survey Alaska Travelers Survey 2003

% of Total	
Southeast	
Juneau/Douglas	36%
Haines	33
Skagway	25
Ketchikan	20
Sitka	9
Prince of Wales Island	6
Glacier Bay/Gustavus	6
Petersburg	5
Wrangell	3
Other Southeast	4
Southcentral	
Anchorage/Eagle River	39%
Seward	25
Homer	19
Kenai/Soldotna	12
Valdez	13
Palmer/Wasilla	17
Talkeetna	4
Other Southcentral	13
Interior/Far North	
Fairbanks/North Pole	32%
Denali	33
Tok	26
Other Interior/Far North	17
Southwest	
Other Southwest	2%

Previous and Future Alaska Travel

There is an increase in repeat visitors to Alaska, 49 percent compared to 35 percent in 2001. Those who visited Alaska previously made an average of four trips. Among those on repeat trips, nearly one-quarter used the ferry to enter or exit Alaska on their last trip.

There is a significant increase in the percentage of visitors who report they are very likely to return to Alaska, from 40 percent in 2001 to 51 percent. Of those who are very likely to return, 43 percent are very likely to use the Alaska Marine Highway.

Previous and Future Alaska Travel Alaska Marine Highway Onboard Visitor Survey Alaska Travelers Survey 2003

% of Total	
Is this your first trip to Alaska?	
Yes	51%
No	49
Average number of previous trips	4.0
On your last visit, what mode of transportation did you use to enter/exit Alaska? (Base: Repeat visitors)	
Airplane	41%
Highway	27
Ferry	24
Cruise	7
How likely are you to return to Alaska?	
Very likely	51%
Likely	29
Unlikely	10
Very Unlikely	2
How likely are you to use the ferry on your next trip to Alaska? (Base: Visitors who are very likely to return to Alaska)	
Very likely	43%
Likely	14
Unlikely	7
Very Unlikely	1

Visitor Origin

Eighty-two percent of all visitors originate from the U.S. The Western U.S. is an increasingly important visitor market for the ferry system. The percentage of visitors from the Western U.S increased from 36 percent to 50 percent since 2001. One of every seven visitors is from California. Visitors originating from California increased from 9 percent to 14 percent since 2001.

There was a dramatic decline in visitors from the Southern U.S. from 20 percent in 2001 to 9 percent. The percentage of international visitors also declined significantly, from 24 percent to 18 percent of the ferry market.

Visitor Origin
Alaska Marine Highway Onboard Visitor Survey
Alaska Travelers Survey 2003

	% of Total
Western US	50%
Washington	12
California	14
Southern US	9
Mid-Western US	18
Eastern US	5
International	18
Canada	7
Other International	11

Demographics

The average party size increased slightly from 2.2 people to 2.3 people since 2001. Almost two-thirds of respondents (63 percent) traveled in groups of two. There are fewer visitors traveling alone than in the previous survey, representing 18 percent of the ferry market.

The largest percentage of ferry visitors falls between the ages of 45 and 64 years old, indicating that many visitors are still in the workforce. The average visitor is well-educated, with over one-half (58 percent) having completed college degrees. The percentage of visitors who are college graduates increased almost ten percent since 2001. Median household income increased by five percent, from \$65,000 to \$68,000.

Demographics
Alaska Marine Highway Onboard Visitor Survey
Alaska Travelers Survey 2003

All Visitors	
Party Size	
One person	18%
Two people	63
Three people	7
Four people	6
Five or more people	5
Average Party size	2.3 people
Gender	
Female	47%
Male	53
Age	
19-34 years old	11%
35-44 years old	8
45-64 years old	42
Over 65 years old	26
Education	
Less than high school	2%
High school diploma/GED	25
Vocational cert./Associates degree	12
College Graduates	58%
Bachelor's degree	27
Master's degree	22
Doctorate	9
Household Income	
Under \$35,000	20%
\$35,000 to \$50,000	14
\$50,000 to \$75,000	19
\$75,000 to \$100,000	13
\$100,000 to \$150,000	14
Over \$150,000	9
Median Income	\$68,000
Refused	10

This chapter was revised in February of 2004.

In this chapter, the study team presents an estimate of the number of out-of-state visitors to Juneau in the summer of 2003 (May to September). The methodology is discussed so that the Juneau Convention and Visitors Bureau can estimate visitor arrivals in the future.

There are three primary ways for out-of-state visitors to access Juneau: via cruise ship, via Alaska Airlines, or via the Alaska Marine Highway. A small number of visitors take day trips via fast ferry from Haines or Skagway. While it is possible to arrive in Juneau by personal boat or plane, the volume of traffic is likely negligible – as well as extremely difficult to track. As Juneau is a regional hub for communities like Gustavus, Haines, Skagway, and Elfin Cove, the majority of commuter airline passenger traffic is assumed to have entered Juneau previously via air or Alaska Marine Highway, and would have been captured in our tallies.

This visitor volume estimate utilizes data obtained from Cruise Line Agencies, Juneau International Airport (Alaska Airlines traffic), Alaska Marine Highway and private fast ferry operations.

Air Arrivals

Visitor Arrival Data

Juneau International Airport compiles monthly data on total air enplanements and deplanements. The study team derived estimates of northbound and southbound visitor volumes based on flight schedules and interviews with Alaska Airlines personnel.

Visitor/Resident Ratios

To determine the ratio of visitors to residents among Alaska Airlines visitors, McDowell Group conducted intercept surveys outside the airport security gate. For selected flights, all embarking visitors were asked whether they were an Alaska resident or visitor. The study team obtained a representative sample by surveying during a variety of weekdays, time of day, flight direction, and flight destination.

These surveys were conducted with embarking visitors – people exiting Juneau – while the visitor arrival data used is for disembarking visitors. Historically, the ratio of visitors to residents among arriving visitors has been very similar to departing visitors.

The intercept survey effort resulted in an overall monthly ratio for both northbound and southbound traffic, based on surveys of over 4,000 visitors. Ratios for summer 2003 were compared to historical air arrival ratios obtained by McDowell Group other visitor research studies.

Total Visitor Estimate

To determine the total number of visitors arriving by air, visitor/resident ratios are applied to the total traffic by month and northbound/southbound departures. The table below illustrates this process, with notes indicating how data was obtained. In future years the same methodology may be used to track visitor arrivals.

Juneau Air Visitor Arrivals, Summer 2003

	May	June	July	August	September	Total
Total arrivals ¹	23,209	31,612	34,714	35,272	20,897	145,704
Arrivals from the South						
Percentage of total ²	49%	57%	57%	56%	43%	53%
Total arrivals (south) ³	11,372	18,089	19,787	19,752	8,986	77,916
% visitors ⁴	55.0%	75.0%	62.8%	66.9%	42.7%	62.3% ⁵
Total visitors ⁶	6,255	13,514	12,426	13,214	3,837	49,246
Arrivals from the North						
Percentage of total ²	51%	43%	43%	44%	57%	47%
Total arrivals (north) ³	11,837	13,593	14,927	15,520	11,911	67,788
% visitors ⁷	15.4%	33.9%	23.7%	33.9%	15.4%	25.9%
Total visitors	1,823	4,608	3,538	5,261	1,834	17,064
Total Air Visitors⁸	8,078	18,122	15,964	18,475	5,671	66,311

¹ Obtained from Juneau International Airport.

² Obtained from Alaska Airlines.

³ Total arrivals times percentage of total.

⁴ June through September obtained from on-site visitor tallies; May estimated using past AVSP ratios and estimated resident traffic.

⁵ Total visitors divided by total arrivals. Note that this is done as a final step, after each month's counts have been determined, then added together for a seasonal total.

⁶ Applied percent of visitors to total arrivals.

⁷ July through September obtained from on-site visitor tallies; May and June based on August and September ratios.

⁸ South plus north visitors.

Ferry Arrivals

Visitor Arrival Data

The Alaska Marine Highway System tracks embarking and disembarking visitors at each port on a monthly basis. The Alaska Marine Highway annual report is not typically released until the following spring; however, it is possible to get preliminary data from Alaska Marine Highway staff. The study team obtained summer 2003 disembarking visitors at Juneau, by month, from Alaska Marine Highway staff for this visitor volume estimate.

Visitor/Resident Ratios

Determining visitor/resident ratios for the ferry system is a much more challenging task than for air arrivals, largely due to the higher number of variables involved. The ferry ratio can vary widely, affected not only by the date of voyage but also vessel, route, and special events occurring in the region. The study team used two different sources to estimate the visitor/resident ratio for ferry disembarkations at Juneau.

A major source of information on ferry ratios was the McDowell Group's 2000 report: *Alaska Marine Highway System Marketing and Pricing Study*. This study involved an extensive survey effort on board AMHS vessels that included 2,500 personal intercept surveys of ferry visitors over a 12-month period. The survey plan was devised to include a representative sample of ferry visitors with regard to vessel, date, route, and trip purpose. The survey effort resulted in visitor/resident ratios for each of the major route links to and from Juneau.

Juneau-specific ratios were also obtained in a manner similar to the air arrival ratios. McDowell Group survey staff conducted nearly 1,100 personal intercept surveys of visitors before they boarded the Alaska Marine Highway vessels. Based on information from these two sources, the study team estimated the ratios for Juneau disembarkations in the summer of 2003.

Total Visitor Estimate

To determine the total number of visitors arriving by ferry, visitor/resident ratios are applied to the total traffic by month. The table below illustrates this process, along with notes on methodology for use in future tally efforts.

Juneau Ferry Visitor Arrivals, Summer 2003

	May	June	July	August	September	Total
Total arrivals ¹	5,315	8,673	11,824	11,676	5,705	43,193
% visitors ²	47%	71%	62%	65%	63%	63% ³
Total Ferry Visitors⁴	2,498	6,158	7,331	7,589	3,594	27,170

¹ Obtained from Alaska Marine Highway.

² Estimated using results of 2000 AMHS Marketing and Pricing Study and 2003 on-site visitor surveys.

³ Total visitors divided by total arrivals. Note that this is done as a final step, after each month's counts have been determined, then added together for a seasonal total.

⁴ Applied % visitors to total arrivals.

Day Tour Arrivals

Day tour arrivals include cruise visitors and visitor ferry arrivals. Since cruise ship visitors are assumed to be out-of-state residents, visitor/resident ratios were not conducted. Similarly, passenger ferry visitors on day tours from Skagway and Haines are assumed to be out-of-state residents not included in airline or Alaska Marine Highway arrival estimates.

Cruise ship traffic data was obtained from Cruise Line Agencies. Passenger ferry data was obtained from Alaska Fjordlines.

Because monthly ratios are not necessary, data can be collected on a seasonal basis.

Juneau Day Tour Visitor Arrivals, Summer 2003

	Total
Cruise visitor arrivals	777,000
Fast ferry visitor arrivals	4,500
Total Day Tour Visitors	781,500

Total Summer Visitor Arrivals

Between May and September 2003, approximately 881,000 out-of-state visitors came to Juneau. Nearly 93,500 arrived via airline or ferry, while 781,500 arrived by cruise or day ferry.

Total Juneau Visitor Arrivals, Summer 2003

	Total
Total air and ferry visitor arrivals	93,500
Total day tour visitor arrivals	781,500
Total Summer Visitor Arrivals	875,000

Note: Numbers have been rounded to the nearest 100.