

Juneau Cruise Visitor Profile, 2005

Alaska Travelers Survey

**PREPARED FOR:
City and Borough of Juneau**



Research-Based Consulting

**Juneau
Anchorage**

**December 2005
Exhibit KP
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PREPARED BY:



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INTRODUCTION AND METHODOLOGY

Introduction

To find out more about Juneau visitor markets, the City and Borough of Juneau contracted with the McDowell Group, an Alaska research firm based in Juneau, to provide summer 2005 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.

In 2005, the McDowell group conducted nearly 6,000 personal intercept interviews statewide. Pleasure visitors using all major transportation modes – air, cruise ship, ferry and highway – were interviewed. The program excludes Alaska residents, visitors traveling exclusively for business, and seasonal employees.

Methodology

This report includes findings from a survey of Juneau summer 2005 cruise visitors. Juneau hosted 948,226 cruise ship passengers in 2005. Visitors were interviewed by McDowell Group staff as they returned to their ship and had concluded their Juneau experience. Using a statistical sampling procedure to randomly select voyages and passengers throughout the season, McDowell Group surveyors intercepted 329 cruise passengers. The maximum margin of error on the survey is ± 5.5 percent at the 95 percent confidence level.

Both northbound and southbound cruise passengers were interviewed to ensure appropriate sampling of characteristics, ratings, and spending patterns of all cruise visitors. Survey responses were weighted by brand to ensure that the data mirrored the overall cruise market.

The survey consists of questions specifically developed for the City and Borough of Juneau. The survey instrument was developed by McDowell Group staff with input from CBJ staff. Several questions were retained from previous generations of *Alaska Travelers Survey* to track changes in visitors' perceptions and experience over time.

In 2005, several new questions were added to gauge visitors' reaction to proposed waterfront improvements. A copy of the survey instrument is included in the report appendix.

Cruise Visitor Participation in Juneau Tours and Activities

- The majority of cruise visitors (83 percent) participated in at least one tour while in Juneau. This is a significant increase since 2003, when 73 percent participated in a tour.
- The most common tours cruise visitors participated in were glacier tours at 42 percent. Also popular were wildlife and marinelife viewing, Mt. Roberts Tramway, city tours, and helicopter flightseeing.

Cruise Visitor Participation in Juneau Tours and Activities

Tours and excursions	2005	2003	2001
Glacier tours	42%	36%	33%
Wildlife/marinelife viewing	21	22	13
Mt. Roberts Tramway	14	24	24
City tours	12	21	16
Flightseeing (helicopter)	12	13	10
DIPAC hatchery	9	4	9
Salmon bake	8	8	10
Glacier Gardens	7	1	3
Gold panning/mine tour	3	3	1
Rafting	3	5	2
Fishing	2	3	1
City walking tour	2	1	1
Flightseeing (small plane)	2	5	3
Museums/historic sites	2	7	3
Hiking/nature walk	2	2	2
Kayaking	1	1	2
Other	1	3	8
None	17	24	16

Visitor Satisfaction with Juneau Experiences

- As in 2003, cruise visitors continue to express a high degree of satisfaction with their overall experience in Juneau. However, satisfaction ratings for several individual aspects of the Juneau experience declined.
- Ninety-seven percent of cruise visitors said they were satisfied or very satisfied with their overall experience, compared to 98 percent in 2003. Sixty-one percent were very satisfied, which was very similar to cruise visitors' response in 2003 (63 percent).
- There was a decrease in satisfaction ratings for customer service. Fifty-four percent of cruise visitors were very satisfied with the customer service they received in Juneau, compared to 65 percent in 2003.
- Fifty-seven percent of cruise visitors were very satisfied with community friendliness in Juneau, dropping from 69 percent in 2003.
- Sixty-two percent were very satisfied with tours offered in Juneau, compared to 69 percent in 2003.
- Forty-four percent of cruise visitors rated themselves very satisfied with shopping in Juneau, compared to 50 percent in 2003.
- Forty-nine percent said they were very satisfied with transportation in downtown. This question was not asked in prior years.

Cruise Visitor Satisfaction Ratings

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Overall Juneau experience	61%	36%	1%	2%	<1%
Customer service in Juneau	54	44	1	1	0
Community friendliness	57	39	3	<1	0
Tours in Juneau	62	32	4	1	1
Shopping in Juneau	44	47	7	1	<1
Transportation within the downtown area	49	41	2	6	1

Satisfaction Rating Trends Percent "Very Satisfied"

	2005	2003	2001
Overall Juneau experience	61%	63%	58%
Customer service in Juneau	54	65	62
Community friendliness	57	69	65
Tours in Juneau	62	69	55
Shopping in Juneau	44	50	49
Transportation within the downtown area	49	na	na

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Most Enjoyable Juneau Experiences

- Forty-four percent of cruise visitors reported scenery/sightseeing as the experience they most enjoyed about Juneau. This represents an increase since 2003, when one in three cruise visitors reported scenery/sightseeing as their favorite Juneau experience.
- Glaciers were mentioned by 27 percent of cruise visitors as their most enjoyable Juneau experience. Cruise visitors also listed shopping, the people, the weather and various tours as the experiences they most enjoyed, including whale watching tours and flightseeing.

Most Enjoyable Juneau Experiences

Enjoyed Most	2005
Scenery/sightseeing	44%
Glaciers	27
Whale watching	16
Shopping	15
Weather	9
People	7
Flightseeing	6
Museums/historic sites	6
Mt. Roberts Tramway	6
Food/restaurants	4
Other tours	4
Hiking	3
Red Dog	2
Fishing	2
Kayaking	1
Wildlife	1
Friends/family	<1
Other	3
Don't know/Refused	2

Responses were top of mind.

- Multiple responses were allowed in 2005, resulting in increases for several of the most frequently mentioned experiences.

Trends in Most Enjoyable Experiences

Enjoyed Most	2005	2003	2001
Scenery/sightseeing	44%	34%	20%
Glaciers	27	20	18
Whale watching	16	8	9
Shopping	15	5	7
Weather	9	3	2
People	7	2	2
Flightseeing	6	6	8
Museums/historic sites	6	3	2
Mt. Roberts Tramway	6	3	6
Food/restaurants	4	**	--

Responses were top of mind.

Least Enjoyable Juneau Experiences

- The most frequent response from visitors about what they enjoyed the least about Juneau was “nothing,” mentioned by 43 percent of respondents (down from 54 percent in 2003).
- The weather was the second most common response, mentioned by one-quarter of visitors. More cruise visitors expressed dissatisfaction with the weather in 2005 (24 percent) than in 2003 (11 percent).
- Four percent of respondents mentioned “crowded” or “too many tourists” – the same percentage as in 2003.

Least Enjoyable Juneau Experiences

Enjoyed Least	2005
Nothing	43%
Weather	24
Not enough time	6
Crowded/too many tourists	4
Shops are too touristy	3
Tour issues	3
Retail prices	3
Tour prices	3
Transportation	2
Poor customer service	2
Lack of dining options	2
Walking distances	1
Food prices	1
Shopping issues	1
Other	4
Don't know/Refused	6

Responses were top of mind.

- Despite the fact that multiple responses were allowed in 2005, there were not significant increases in cruise visitors' comments about time, prices, or crowding.

Least Enjoyable Juneau Experiences

Enjoyed Least	2005	2003	2001
Nothing	43%	54%	50%
Weather	24	11	24
Not enough time	6	6	--
Prices	6	6	3
Crowded/too many tourists	4	4	3

Responses were top of mind.

Visitor Expenditures

- Visitors spent an average of \$186 per person in 2005: \$100 per person on tours and shore excursions and \$86 per person on other items. Visitors spent \$93 per person in 2003 for tours and excursions and \$95 per person on other items, a total of \$175 per person.

Visitor Expenditures on Tours and Shore Excursions in Juneau

Tours and Excursions	
Zero	17%
\$1 to \$25	14
\$26 to \$50	16
\$51 to \$75	8
\$76 to \$100	12
\$101 to \$125	9
\$126 to \$150	7
\$151 to \$175	2
\$176 to \$200	4
Over \$201	12
Average expenditures	\$100 per person

Visitor Expenditures on Other Items in Juneau

Other Items	
Zero	12%
\$1 to \$10	17
\$11 to \$20	11
\$21 to \$30	14
\$31 to \$40	5
\$41 to \$50	10
\$51 to \$100	15
Over \$101	16
Average expenditures	\$86 per person

Visitor Expenditure Trends

	2005	2003	2001
Tours and excursions	\$100	\$93	\$87
Other expenditures	86	95	64
Total expenditures	186	175	122

The average spending on tours plus the average spending on other expenditures does not always equal the total average spending due to the fact that some visitors were only able to answer the total spending question.

Visitor Perceptions of the Need for Improvements

- The waterfront improvement seen as most needed by cruise passengers was a continuous walkway along the waterfront. More than three out of four cruise visitors (78 percent) rated this improvement as important or very important.
- “More cultural and historical information” was the only other improvement seen as important by a majority of cruise passengers, with 54 percent saying this was important or very important.
- Other improvements, including better directional signage, more visitor information kiosks, and more parks and open spaces, were seen as important by one-quarter to one-third of respondents.

Visitor Perceptions of the Need for Waterfront Improvements 2005

	Very Important	Important	Not Important	Don't know/ Refused
Continuous walkway along waterfront	39%	39%	11%	11%
More cultural and historical information	19	35	27	19
Better directional signage	12	28	37	23
More visitor information kiosks	9	25	52	14
More parks and open spaces	8	26	40	26

- When analyzing responses by dock, cruise visitors at the AJ and South Franklin Street docks expressed the highest interest in the continuous waterfront walkway.
- Visitors at the South Franklin Street dock expressed less need for other proposed waterfront improvements compared to visitors at other docks.

Visitor Response by Dock, Percent “Very Important” or “Important”

	AJ	Franklin	Cruise	Steamship
Continuous walkway along waterfront	81%	82%	68%	75%
More cultural and historical information	63	48	50	62
Better directional signage	38	39	45	43
More visitor information kiosks	38	28	36	35
More parks and open spaces	41	28	32	42

- The majority of cruise visitors (89 percent) said their Juneau experience was not affected by overcrowding.
- For those visitors who felt the number of visitors detracted from their Juneau experience, sidewalks, shops, downtown, streets and the glacier were the most common locations mentioned. (Note that the sample size for individual areas is extremely small as only 36 respondents were asked this follow-up question.)

Visitor Perceptions of Crowding

Were there any times when you felt that the number of visitors detracted from your Juneau experience?	
No	89%
Yes	10
Don't know	1
Where did this occur? (Base: Respondents who answered Yes; n=36)	
Sidewalks	50%
Shops	27
Downtown	24
Streets	20
Glacier	17
Tours	16
Restaurants	9
Docks	6
Other	3
Don't know/refused	4
Responses by Dock (Base: Respondents who answered Yes; n=36)	
AJ	11%
Franklin	9
Cruise	10
Steamship	12

Locations identified in the follow-up question were top of mind.

- About two out of three cruise visitors said they walked along Franklin Street past the Red Dog Saloon.
- The Capitol building was the next most common destination that visitors walked to from their cruise dock; about one in eight cruise visitors (13 percent) walked there.
- One-third of visitors did not walk to any of the locations mentioned in the survey.

Locations Visitors Walked To From Waterfront

	Percent
Franklin Street past the Red Dog	64%
Capitol building	13
City Museum	8
State Museum	6
Russian church	6
Governor's mansion	4
Don't know/refused	1
None of the above	33

Locations Visitors Walked To From Waterfront by Dock

	AJ	Franklin	Cruise	Steamship
Franklin Street past the Red Dog	54%	67%	64%	70%
Capitol building	11	15	13	12
City Museum	3	12	6	10
State Museum	8	8	0	6
Russian church	3	5	9	6
Governor's mansion	2	3	4	5
Don't know/refused	2	2	0	0
None of the above	44	29	32	26

VISITOR RECOMMENDATIONS AND FUTURE TRAVEL

Visitor Recommendations

- The vast majority of cruise visitors (98 percent) would recommend Juneau to friends and family as a place to visit. Scenic beauty, an overall positive experience, glaciers and other attractions were the most common reasons given for recommending Juneau.
- Weather and expense were the main reasons given by the 1 percent of visitors who said they would not recommend Juneau to their friends and family. The sample size of these respondents is too small for a more detailed analysis.

Recommendations to Friends and Family

<i>Would you recommend Juneau to friends and family as a place to visit?</i>	
Yes	98%
No	1
Don't know	1
<i>Why? (Base: Respondents who answered Yes)</i>	
Scenic beauty	62%
Positive experience	42
Glaciers	23
Attractions	19
People	15
Tours/activities	15
Shopping	4
History	4
Weather	2
Cruise itinerary	1
Fishing	1
Other	4
Don't know	1

Future Travel

- One out of seven cruise passengers said they are “very likely” to return to Juneau, with another 31 percent saying they are “likely” to return.

Likelihood of Returning to Juneau

	2005
Very likely	15%
Likely	31
Unlikely	38
Very unlikely	13
Don't know	3

VISITOR CHARACTERISTICS

- The average party size increased from 2.3 people to 3.2 people between 2003 and 2005. Almost two-thirds of respondents (63 percent) traveled in groups of two. There were fewer visitors traveling alone than in prior years.

Party Size

2005	
One person	6%
Two people	63
Three people	5
Four people	14
Five or more people	12

Average Party Size Trends

	2005	2003	2001
Average party size	3.2 people	2.8 people	2.6 people

Cruise Line

Percent	
Princess	31%
Holland America	21
Royal Caribbean	13
Celebrity	11
Norwegian	16
Carnival	5
Radisson Seven Seas	1
Crystal	1
Don't know/other	1

- As in 2003, the vast majority of cruise visitors are from the United States. Southern US and Western US are leading regions.
- Seventeen percent of cruise visitors are international visitors, very similar to the number of international cruise visitors in 2003 (16 percent). Canada is the leading international country (8 percent).

Visitor Origin

2005	
United States	83%
Southern US	29
Florida	6
Texas	5
Western US	26
California	15
Arizona	2
Midwestern US	15
Illinois	3
Ohio	3
Eastern US	13
New York	4
New Jersey	3
Canada	8%
Other International	9%
United Kingdom	3
Australia	1
Other	5

Visitor Origin Trends

	2005	2003	2001
United States	83%	85%	83%
Southern US	29	27	19
Western US	26	22	29
Midwestern US	15	22	19
Eastern US	13	14	16
Canada	8%	11%	9%
Other International	9%	5%	9%

Refusals _____

1. Which state or country are you visiting from?

U.S.

- | | | | |
|---|---|--|--|
| 01 <input type="checkbox"/> Alabama | 14 <input type="checkbox"/> Iowa | 27 <input type="checkbox"/> Nevada | 40 <input type="checkbox"/> South Dakota |
| 02 <input type="checkbox"/> Arizona | 15 <input type="checkbox"/> Kansas | 28 <input type="checkbox"/> New Hampshire | 41 <input type="checkbox"/> Tennessee |
| 03 <input type="checkbox"/> Arkansas | 16 <input type="checkbox"/> Kentucky | 29 <input type="checkbox"/> New Jersey | 42 <input type="checkbox"/> Texas |
| 04 <input type="checkbox"/> California | 17 <input type="checkbox"/> Louisiana | 30 <input type="checkbox"/> New Mexico | 43 <input type="checkbox"/> Utah |
| 05 <input type="checkbox"/> Colorado | 18 <input type="checkbox"/> Maine | 31 <input type="checkbox"/> New York | 44 <input type="checkbox"/> Vermont |
| 06 <input type="checkbox"/> Connecticut | 19 <input type="checkbox"/> Massachusetts | 32 <input type="checkbox"/> North Carolina | 45 <input type="checkbox"/> Virginia |
| 07 <input type="checkbox"/> Delaware | 20 <input type="checkbox"/> Maryland | 33 <input type="checkbox"/> North Dakota | 46 <input type="checkbox"/> Washington |
| 08 <input type="checkbox"/> Florida | 21 <input type="checkbox"/> Michigan | 34 <input type="checkbox"/> Ohio | 47 <input type="checkbox"/> Washington, D.C. |
| 09 <input type="checkbox"/> Georgia | 22 <input type="checkbox"/> Minnesota | 35 <input type="checkbox"/> Oklahoma | 48 <input type="checkbox"/> West Virginia |
| 10 <input type="checkbox"/> Hawaii | 23 <input type="checkbox"/> Mississippi | 36 <input type="checkbox"/> Oregon | 49 <input type="checkbox"/> Wisconsin |
| 11 <input type="checkbox"/> Idaho | 24 <input type="checkbox"/> Missouri | 37 <input type="checkbox"/> Pennsylvania | 50 <input type="checkbox"/> Wyoming |
| 12 <input type="checkbox"/> Illinois | 25 <input type="checkbox"/> Montana | 38 <input type="checkbox"/> Rhode Island | |
| 13 <input type="checkbox"/> Indiana | 26 <input type="checkbox"/> Nebraska | 39 <input type="checkbox"/> South Carolina | |

International

- | | | | |
|---------------------------------------|-------------------------------------|--|---|
| 51 <input type="checkbox"/> Australia | 56 <input type="checkbox"/> France | 61 <input type="checkbox"/> New Zealand | 66 <input type="checkbox"/> Other Asia |
| 52 <input type="checkbox"/> Austria | 57 <input type="checkbox"/> Germany | 62 <input type="checkbox"/> Russia | 67 <input type="checkbox"/> Other Europe |
| 53 <input type="checkbox"/> Belgium | 58 <input type="checkbox"/> Japan | 63 <input type="checkbox"/> Sweden | 68 <input type="checkbox"/> Other Latin America |
| 54 <input type="checkbox"/> Canada | 59 <input type="checkbox"/> Korea | 64 <input type="checkbox"/> Switzerland | 97 <input type="checkbox"/> Other |
| 55 <input type="checkbox"/> China | 60 <input type="checkbox"/> Mexico | 65 <input type="checkbox"/> United Kingdom | |

2. What tours or shore excursions in Juneau did you or anyone in your party purchase? (Show list)

- | | | |
|--|--|--|
| 01 <input type="checkbox"/> Glacier tour | 07 <input type="checkbox"/> Salmon Bake | 13 <input type="checkbox"/> Fishing |
| 02 <input type="checkbox"/> Tramway | 08 <input type="checkbox"/> Museums/historical sites | 14 <input type="checkbox"/> Hiking/nature walk |
| 03 <input type="checkbox"/> City tours | 09 <input type="checkbox"/> Wildlife viewing tour | 15 <input type="checkbox"/> Glacier Gardens |
| 04 <input type="checkbox"/> Day cruise | 10 <input type="checkbox"/> Rafting | 16 <input type="checkbox"/> City walking tour |
| 05 <input type="checkbox"/> Flightseeing (helicopter) | 11 <input type="checkbox"/> DIPAC Hatchery | 17 <input type="checkbox"/> Kayaking |
| 06 <input type="checkbox"/> Flightseeing (small plane) | 12 <input type="checkbox"/> Gold panning/mine tour | 18 <input type="checkbox"/> None |
| 97 <input type="checkbox"/> Other _____ | | |

Please tell me whether you were very satisfied, satisfied, dissatisfied, or very dissatisfied with:

	Very Satisfied	Satisfied	Neither/Neutral	Dissatisfied	Very Dissatisfied	Does not Apply
3. Your overall Juneau experience	5	4	3	2	1	9
4. Customer service in Juneau	5	4	3	2	1	9
5. Community friendliness in Juneau	5	4	3	2	1	9
6. Tours in Juneau	5	4	3	2	1	9
7. Shopping in Juneau	5	4	3	2	1	9
8. Transportation within the downtown area	5	4	3	2	1	9

9. What did you enjoy MOST about your Juneau experience? (Check up to 3)

- | | | |
|--|--|--|
| 01 <input type="checkbox"/> Scenery/sightseeing | 06 <input type="checkbox"/> People | 11 <input type="checkbox"/> Mt. Roberts Tram |
| 02 <input type="checkbox"/> Friends/family | 07 <input type="checkbox"/> Hiking | 12 <input type="checkbox"/> Weather |
| 03 <input type="checkbox"/> Glaciers | 08 <input type="checkbox"/> Shopping | 13 <input type="checkbox"/> Kayaking |
| 04 <input type="checkbox"/> Fishing | 09 <input type="checkbox"/> Whale watching | 14 <input type="checkbox"/> Does not apply |
| 05 <input type="checkbox"/> Museums/historical sites | 10 <input type="checkbox"/> Flightseeing | 98 <input type="checkbox"/> Don't know |
| | 15 <input type="checkbox"/> Food/restaurants | 99 <input type="checkbox"/> Refused |
| | | 97 <input type="checkbox"/> Other _____ |

10. What did you enjoy LEAST about your Juneau experience? (Check up to 3)

- 01 Nothing
- 02 Weather
- 03 Crowded/too many tourists
- 04 Poor customer service
- 05 Food prices
- 06 Retail prices
- 07 Tour prices
- 08 Hotel/motel prices
- 12 Not enough time
- 09 Shops are too touristy
- 10 Transportation
- 11 Does not apply
- 98 Don't know
- 99 Refused
- 97 Other _____

11. Were there any times when you felt that the number of visitors detracted from your Juneau experience?

- 1 Yes
- 2 No (skip to Q#12)
- 9 Don't know/refused (skip to Q#12)

11a. Where did this occur? (Check all that apply)

- 01 Sidewalks
- 02 Streets
- 03 Docks
- 04 Shops
- 05 Tours
- 06 Restaurants
- 07 Downtown
- 08 Glacier
- 97 Other _____
- 99 Don't know/refused

12. To help improve the visitor experience in Juneau, please tell me if you think the following waterfront developments are very important, important, or not important to develop.

(Read list; rotate)	Very Important	Important	Not Important	Don't know	Refused
A. A continuous walkway along the waterfront	3	2	1	8	9
B. Better directional signage	3	2	1	8	9
C. More visitor information kiosks	3	2	1	8	9
D. More parks and open spaces	3	2	1	8	9
E. More cultural and historical information	3	2	1	8	9

13. Did you walk from the waterfront to any of the following locations in downtown Juneau? (Read 1-6)

- 01 Capitol building
- 02 Governor's House
- 03 City Museum
- 04 State Museum
- 05 Russian Church
- 06 Franklin Street past the Red Dog Saloon (explain)
- 07 None of the above
- 99 Don't know/refused

14. Including yourself, how many people are traveling in your immediate party sharing expenses such as food, lodging and transportation? _____

15. Can you estimate what your traveling party spent on tours and shore excursions in Juneau? Please include tours your party bought before and during your trip. \$ _____ 98 Don't know 99 Ref.

16. Can you estimate what your traveling party spent on all other items while in Juneau, such as souvenirs, transportation, and restaurants? \$ _____ 98 Don't know 99 Ref.

17. How likely are you to return to Juneau? (Read 1-4)

- 1 Very likely
- 2 Likely
- 3 Unlikely
- 4 Very unlikely
- 8 Don't know
- 9 Refused

17a. How are you most likely to return to Juneau: cruise ship, airplane, or ferry?

- 1 Cruise ship
- 2 Airplane
- 3 Ferry
- 8 Don't know
- 7 Other _____

18. Would you recommend Juneau to friends and family as a place to visit?

- 1 Yes → **18a. Why?**
- 01 People
 - 02 Attractions
 - 03 Positive experience
 - 04 Tours/activities
 - 05 Scenic beauty
 - 06 Glaciers
 - 07 Fishing
 - 08 Shopping
 - 09 History
 - 97 Other _____
 - 99 Don't know/refused
- 2 No → **18b. Why not?**
- 1 Too expensive
 - 2 Too crowded
 - 3 Weather
 - 9 Don't know/ref.
 - 7 Other _____
- 8 Don't know
9 Refused

E-1. We would like to be able to contact some survey respondents for further research on this project. Would you be willing to give us your e-mail address?

- 1 Yes _____ 2 Do not have email 3 Decline

The following information to be completed by interviewer after survey has been completed.

Interviewer Name: _____

19. Date: _____

20. Cruise Line

- 01 Princess
- 02 Holland America
- 03 Royal Caribbean
- 04 Celebrity
- 05 Norwegian
- 06 Carnival
- 07 Radisson 7 Seas
- 08 Crystal
- 09 Cruise West/AKSS
- 10 World Explorer
- 11 Glacier Bay Cruises
- 12 Clipper
- 13 American Steamboat
- 97 Other _____
- 99 Don't know/refused