

*Haines Cruise and Fast Ferry
Passenger Survey*

Prepared for:
Haines Convention & Visitors Bureau



Research-Based Consulting

Juneau
Anchorage

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Exhibit KR
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Prepared for:
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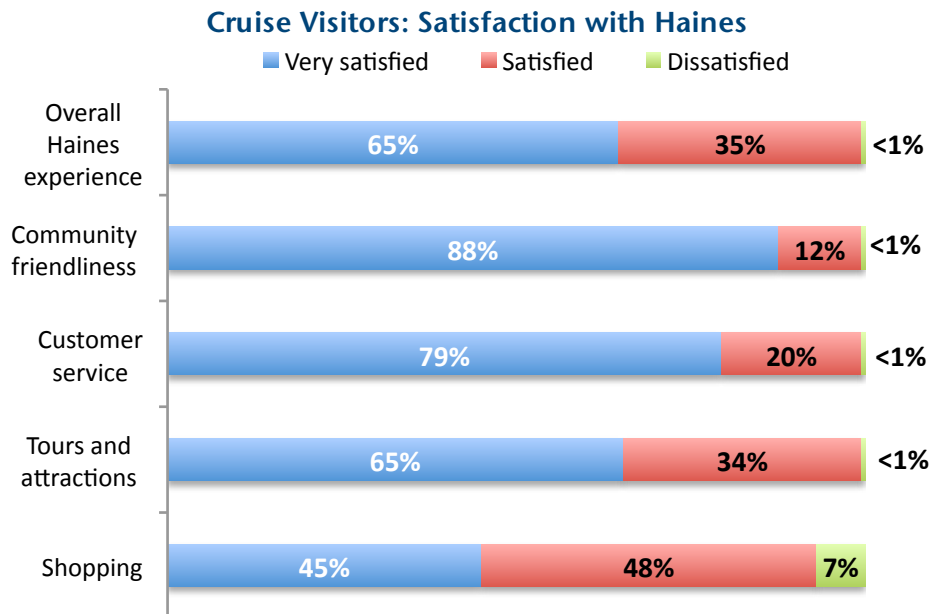
Executive Summary

The Haines Convention and Visitors Bureau contracted with McDowell Group to conduct two intercept surveys in the summer of 2011: one of 190 cruise visitors (those arriving in Haines by cruise ship), the other of 222 fast ferry visitors (those departing Haines via fast ferry to Skagway). The study gathered information on the Haines visitor experience including spending, activities, and satisfaction ratings, as well as opinions on infrastructure development. Following are key findings from the surveys.

Haines Cruise Visitors

Satisfaction Ratings

- Cruise passengers reported high satisfaction ratings with their Haines visit, with 65 percent very satisfied with their overall Haines experience, and another 35 percent satisfied.
- Visitors gave even higher ratings to their interactions with local residents: 88 percent were very satisfied with community friendliness and 79 percent were very satisfied with customer service.
- Less than 1 percent of visitors reported dissatisfaction with any of the categories with the exception of shopping, with which 7 percent were dissatisfied.



Note: Results exclude "don't know" and declined responses. Dissatisfied ratings include "dissatisfied" and "very dissatisfied."

- When asked what they liked most about their Haines visit, the top five responses were: scenery/outdoors (26 percent), friendly people/community (17 percent), tour/activity/attraction (16 percent), peaceful/tranquil (11 percent), and real Alaskan town (10 percent).
- Virtually all cruise passengers (96 percent) said they would recommend Haines to friends and family as a place to visit.

- Many passengers (43 percent) mentioned friendly people/community, peacefulness/tranquility, the “real Alaskan town” feel, and the quaint/non-commercial nature of Haines as the most-liked qualities about their Haines visit. One-quarter mentioned the outdoors or the scenery as most liked.

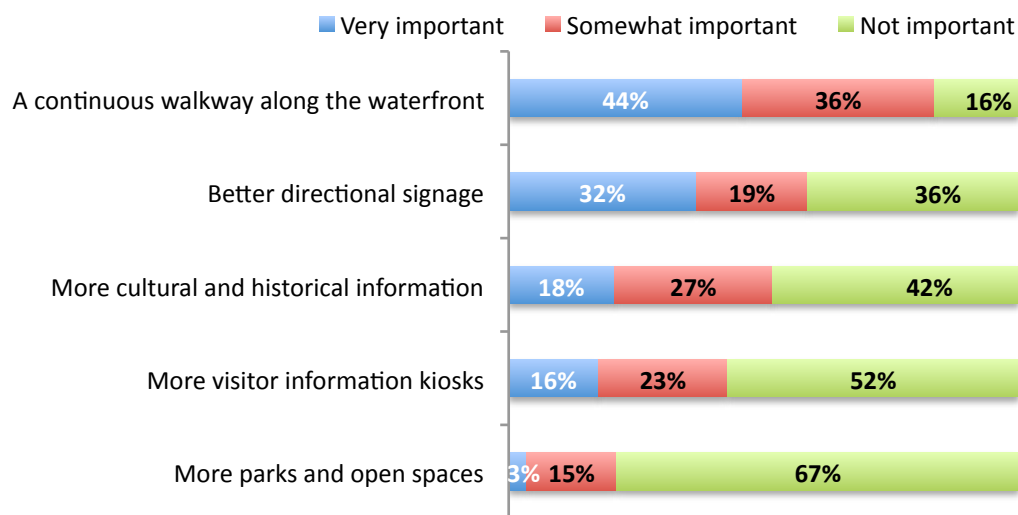
Activities, Destinations, and Spending

- The most popular tours and activities among cruise ship visitors included city tours (18 percent), Alaska Indian Arts (17 percent), the Hammer Museum (16 percent), wildlife viewing (14 percent), Sheldon Museum (13 percent), and the Bald Eagle Foundation (13 percent). Fifteen percent of visitors said they did not participate in any tours or activities while in Haines.
- The vast majority of cruise visitors (85 percent) said they visited downtown, while 61 percent visited Fort Seward. Only 20 percent said they visited Dalton City or the fairgrounds.
- Cruise visitors reported an average spending of \$85 per person while in Haines. The majority of spending was on tours, accounting for an average of \$59 per person; shopping accounted for an average of \$21 per person; and other expenses (such as dining and transportation) accounted for \$5 per person.
- While a large majority (85 percent) of Haines cruise visitors participated in a tour or activity, only half reported spending on tours.

Infrastructure Development

- When asked to rate the importance of various infrastructure developments, cruise visitors rated a continuous walkway along the waterfront as most important, with 44 percent saying this was very important and 36 percent answering somewhat important. This was followed by, in order of perceived importance, better directional signage, more cultural and historical information, more visitor information kiosks, and more parks and open spaces.

Cruise Visitors: Importance of Infrastructure Developments



Note: Chart excludes “don’t know” and declined responses.

Future Visitation

- Ten percent of cruise passengers said they were very likely to visit Haines in the future, while 24 percent said it was likely. While these figures may appear low, they represent significant potential when applied to Haines' total cruise volume.

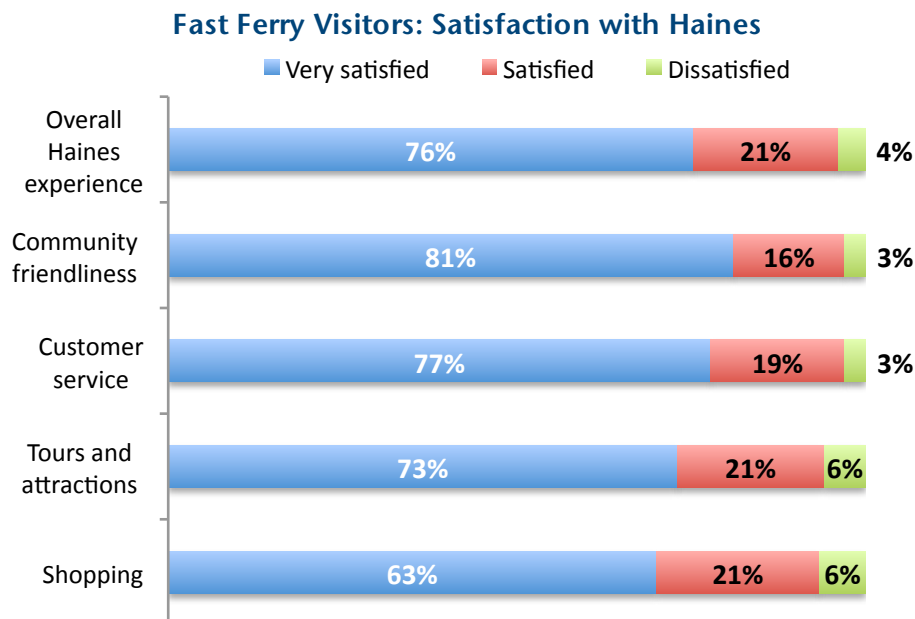
Fast Ferry Visitors

Travel Patterns

- Nearly all fast ferry passengers (93 percent) originated from Skagway, among whom 93 percent had traveled to Skagway by cruise ship (and 7 percent by ferry or highway). The primary reason that most passengers (86 percent) were in Haines was to participate in a tour.

Satisfaction Ratings

- Fast ferry passengers reported high levels of satisfaction with all aspects of their Haines experience, with between 63 and 81 percent very satisfied, depending on the category. Dissatisfaction was very low, ranging from 3 to 6 percent.



Note: Results exclude "don't know" and declined responses. Dissatisfied ratings include "dissatisfied" and "very dissatisfied."

Activities, Destinations, and Spending

- The top five activities among fast ferry passengers were all outdoor-oriented, including wildlife viewing (34 percent), nature hikes/walks (22 percent), 4x4 adventure tours (18 percent), jetboat tours (14 percent), and kayaking (12 percent).
- Nearly half of fast ferry passengers (45 percent) visited Downtown Haines, while 39 percent visited Fort Seward, and 10 percent visited the Fairgrounds.

- Fast ferry passenger reported an average spending in Haines of \$135 per person, primarily accounted for by tour spending at \$119. The average spending on shopping was \$8 per person, and the average spending on other items (such as dining and transportation) was also \$8 per person. The cost of the tour reported by passengers most often included the cost of fast ferry transportation from Skagway.
- Only 4 percent of passengers reported zero spending on tours, while 72 percent spent nothing on shopping, and 69 percent spent nothing on other expenses.

Future Visitation

- Half of fast ferry visitors said that it was either likely (31 percent) or very likely (21 percent) that they would visit Haines again in the future. As with cruise visitors, these potential repeat visitors represent a significant market.

Market Differences

The results of these two surveys highlight several differences between the fast ferry and cruise markets that are important to keep in mind as the community strives to increase visitor satisfaction and spending.

- Almost all fast ferry visitors (86 percent) named “to participate in a tour” as their main motivation for visiting Haines. For Haines cruise visitors, Haines was a port call on a much longer itinerary; they likely did not choose their particular cruise only because of Haines.
- The fast ferry market was much more active in tours and activities than the cruise visitor market, and they were more satisfied (76 versus 65 percent very satisfied) with their overall Haines experience. The spending and satisfaction implications of greater tour and activity involvement by Haines cruise visitors are clear.
- The average spending by fast ferry passengers was significantly higher than among cruise visitors. In addition, fast ferry party size was a higher 3.6 people, compared to 2.5 for the Haines cruise market.
- A much smaller portion of fast ferry visitors shopped, but those that did rated their Haines shopping experience significantly higher than did Haines cruise visitors: 63 versus 45 percent very satisfied.

Recommendations

HCVB should continue their current efforts to attract and retain cruise ship calls at Haines through:

- Cultivating relationships with shore executives and crew members with activities and outreach events.
- Participation in annual cruise Seatrade conference (already planned for 2012).
- Retail training to increase visitor satisfaction and spending.

Haines can become a more cruise visitor-friendly community through continued infrastructure development.

- Continue Port Chilkoot dock upgrades.
- Add more signage and make visitor information more accessible.
- Consider a continuous waterfront walkway (the #1 recommendation of visitors surveyed).
- Continue city-funded shuttle bus service.

Consider incorporating Haines' small-town, friendly character into marketing messages. Visitors expressed a high level of appreciation for this aspect of the community.

Finally, consider all improvements and recommendations within the context of the overall Haines visitor industry, ensuring that they apply to independent as well as cruise markets wherever possible.

Introduction and Methodology

Introduction

The McDowell Group was contracted by the Haines Convention and Visitors Bureau to conduct two visitor surveys during the summer of 2011. One survey targeted visitors arriving in Haines by cruise ship, the second survey targeted visitors leaving Haines and traveling to Skagway via the Haines Fast Ferry. Both studies were conducted between June and September.

Methodology

Haines Cruise Visitors

The cruise survey sample included 190 passengers, distributed among 11 sailings as shown in the table below. (The original sample target of 200 was not met due to a canceled sailing.) Ships were selected based on their overall Haines passenger volume. Passengers were selected randomly and interviewed in the entrance area for the Port Chilkoot Dock by trained McDowell Group surveyors.

The maximum margin of error for the sample of 190 cruise visitors is ± 7.1 percent at the 95 percent confidence level.

Cruise Passenger Survey Sample

	Sailings	# of surveys	% of sample
Zaandam	5	90	47%
Statendam	4	64	34
Sea Princess	1	24	13
Crystal Symphony	1	12	6
Total	11	190	100%

Haines Fast Ferry Passenger Survey

The fast ferry sample consisted of 222 passengers. The vast majority (84 percent) were Skagway cruise passengers returning after participating in a shore excursion in Haines. McDowell Group surveyors were positioned between the entrance of the Port Chilkoot dock and the ramp to the fast ferry dock approximately one-half hour before the vessel was scheduled to sail to Skagway. Passengers were intercepted and asked to complete the survey as they made their way towards the vessel. Sailings were randomly sampled from late June through the late September.

The maximum margin of error for the sample of 222 fast ferry passengers is ± 6.6 percent at the 95 percent confidence level.

Haines Cruise Passenger Survey

Visitor Experience

Participation in Tours and Activities

- The most popular tours and activities among cruise ship visitors included city tours, Alaska Indian Arts, the Hammer Museum, and wildlife viewing. Roughly one out of ten visited the Sheldon Museum, the Bald Eagle Foundation, or participated in a Skagway tour.
- Nearly half of survey participants (46 percent) attended a cultural or historical attraction including Alaska Indian Arts, the Hammer Museum, and the Sheldon Museum. One-quarter of cruise passengers (27 percent) engaged in wildlife-related activities, including wildlife viewing (14 percent) and visiting the Bald Eagle Foundation (13 percent). (Tours to the Kroschel Wildlife Center were considered wildlife viewing).
- Slightly more than one-fifth of passengers participated in outdoor activities such as nature hikes/walks, jetboat tours, river rafting, fishing, kayaking, 4x4 adventure, and flightseeing.
- Fifteen percent of visitors said they did not participate in any tours or activities while in Haines.

What tours or activities did your party participate in while in Haines?

	% of Total
City tour	18%
Alaska Indian Arts	17
Hammer Museum	16
Wildlife viewing	14
Sheldon Museum	13
Bald Eagle Foundation	13
Skagway tour	11
Nature hike/walk	8
Haines Brewery	7
Jetboat tour	4
River rafting	3
Fishing	2
Kayaking	2
4x4 adventure	2
Golf	2
Flightseeing	1
Other	7
None	15

Locations Visited

- The vast majority of cruise visitors (85 percent) said they visited downtown, while 61 percent visited Fort Seward. Only 20 percent said they visited Dalton City or the fairgrounds.

While in Haines did you visit...?

	Yes	No	Don't know
Downtown Haines	85%	15%	--
Fort Seward	61	39	--
Dalton City/Fairgrounds	20	79	1

Shuttle Bus Usage

- One-third of cruise visitors (31 percent) used the shuttle bus to get around Haines. Just 6 percent reported being unaware of its availability.

Did you use the shuttle bus while in Haines?

	% of Total
No	64%
Yes	31
Did not know there was a shuttle	6

- Of the visitors that used the shuttle bus, nearly all were satisfied with the service. One hundred percent of shuttle bus users were either satisfied or very satisfied with the value for their money spent on the service.
- More than two-thirds of those that took the shuttle bus were very satisfied with the convenience of the schedule and 60 percent said they were very satisfied with the comfort.

Please tell me whether you were very satisfied, satisfied, dissatisfied, or very dissatisfied with... (Base: Those who used the Haines shuttle)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know/Ref.
Convenience of the schedule	67%	28%	2%	2%	--	2%
Shuttle comfort	60	33	5	2	--	--
Value for the money	88	12	--	--	--	--

- The few individuals that expressed dissatisfaction with the shuttle were asked why. Reasons mentioned included "The shuttle was too hot," "There were no signs with the schedule or pick-up locations," and "The shuttle should run longer and be expanded."

Visitor Expenditures

- Haines cruise passengers spent an average of \$209 per party during their Haines visit, and an average of \$85 per person (average party size was 2.5 people).
- Tours made up a majority of spending, at an average of \$59 per person and \$152 per party. The average expenditure on tours *among those who reported spending in this category* was \$109 per person.
- Half of those surveyed said their party spent nothing on tours. With 85 percent of passengers saying in a previous question that they participated in at least one activity or tour, this suggests that about one-third engaged in other activities not considered “tours” such as walking around town, museums, and independent wildlife viewing.
- Nearly three-quarters of passengers reported retail spending, with an average of \$45 per party and \$21 per person.
- Other types of spending, such as dining and transportation, was reported by 40 percent of passengers, with an average of \$12 per party and \$5 per person.

Can you estimate what your traveling party spent on the following parts of your Haines visit?

	Tours in Haines	Shopping in Haines	Other Expenses	Total Spending
\$0	50%	28%	60%	10%
\$1 - \$50	--	53	35	30
\$51 - \$100	6	10	3	14
\$101 - \$200	20	6	2	17
\$201 - \$500	19	2	--	23
\$501+	5	1	--	6
Average party spending	\$152	\$45	\$12	\$209
Average per person	\$59	\$21	\$5	\$85

Note: Averages include those who spent zero in each category.

Visitor Satisfaction

Satisfaction with Haines Experience

- All but one cruise visitor stated that they were either satisfied or very satisfied with their overall Haines experience, community friendliness, customer service, and tours and attractions in Haines.
- Community friendliness received the highest very satisfied rating at 88 percent, followed by customer service at 79 percent, and overall Haines experience and tours/attractions, both at 65 percent.
- Shopping in Haines received the lowest rating with slightly less than half (45 percent) of cruise visitors saying they were very satisfied. In total, eight visitors said they were either dissatisfied or very dissatisfied with their Haines shopping experience.

Are you very satisfied, satisfied, dissatisfied or very dissatisfied with...

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied
Your overall Haines experience	65%	35%	<1%	--
Community friendliness	88	12	<1	--
Customer service	79	20	<1	--
Tours and attractions	65	34	<1	--
Shopping	45	48	5	2

Note: These results are based only to those who responded; those who declined to answer or didn't know were excluded.

Improving the Visitor Experience

Possible Improvements

- Cruise visitors were asked to rate the importance of possible developments in Haines to improve the visitor experience, including adding a continuous walkway along the waterfront, improving directional signage, adding visitor information kiosks, adding more parks and open spaces, and adding more cultural and historical information.
- Eighty percent of visitors said they consider a continuous walkway along the waterfront to be a somewhat important or very important addition to Haines, with nearly half of this group believing it to be very important. Sixteen percent stated a continuous walkway was not important.
- Half of visitors said that better directional signage was somewhat or very important to the visitor experience in Haines; more than one-third (36 percent) deemed this not important.
- The addition of more parks and open spaces as well as more visitor information kiosks were not considered as important, with not important ratings of 67 percent and 52 percent, respectively.
- Forty-five percent of participants rated more cultural and historical information to be either a somewhat important (27 percent) or very important (18 percent) addition to Haines while two-fifths (42 percent) said more information was not important.

The community may consider several options to help improve the visitor experience in Haines. Please tell me if you think the following developments are very important, somewhat important or not important to enhance the visitor experience.

	Very important	Somewhat important	Not important	Don't know/Ref.
A continuous walkway along the waterfront	44%	36%	16%	4%
Better directional signage	32	19	36	13
More cultural and historical information	18	27	42	13
More visitor information kiosks	16	23	52	9
More parks and open spaces	3	15	67	14

Community Characteristics

- Cruise visitors were asked to gauge three aspects of the community including whether they felt Haines is a visitor-friendly community, ease of getting around Haines, and if Haines lived up to their expectations. Responses below are based only to those who gave an opinion; those who didn't know or declined to answer were removed from the base.
- Respondents tended to agree with all three statements, with 2 percent or less disagreeing with each statement.
- One out of three passengers did not provide an opinion related to their expectations of Haines (and were removed from the data below), implying that they knew little about the community before arriving.

Do you strongly agree, agree, disagree or strongly disagree with the following statements?

	Strongly agree	Agree	Disagree	Strongly disagree
Haines is a visitor-friendly community	65%	34%	<1%	--%
It's easy to get around town in Haines	59	40	2	--
Haines lived up to my expectations	52	46	1	--

Note: These results are based only to those who responded; those who declined to answer or didn't know were excluded.

Most Liked Aspect of Haines

- When asked what they liked most about their Haines visit, scenery/outdoors was the most often mentioned (26 percent), followed by friendly people/community (17 percent), tour/activity/attraction (16 percent), peaceful/tranquil (11 percent), and real Alaskan town (10 percent).
- Qualities relating to the character of Haines, including friendly people/community, peacefulness/tranquility, the “real Alaskan town” feel, and the quaint/non-commercial nature of Haines made up 43 percent of what cruise visitors rated as the most-liked qualities about their Haines visit.

What did you like most about your Haines visit?

	% of Total
Scenery/outdoors	26%
Friendly people/community	17
Tour/activity/attraction	16
Peaceful/tranquil	11
Real Alaskan town	10
Quaint/not commercial	5
Easy to get around	4
Native culture	2
History	1
Restaurants/food	1
Shopping	1
Don't know	6

Least Liked Aspect of Haines

- When asked what they liked least about their Haines visit, nearly half (45 percent) said “nothing.”
- Weather was cited by 19 percent of participants. The only other aspects receiving more than a few mentions were hills/difficult to get around and retail/restaurant service issues.

What did you like least about your Haines visit?

	% of Total
Weather	19%
Hills/difficult to get around	6
Retail/restaurant service issues	5
Not enough to do	3
Shops/attractions not open	3
Not enough time	3
Lack of visitor info	3
Shuttle problems	2
Too expensive	1
Poor signage	1
Nothing	45
Other*	7
Don't know	4

*Verbatim responses are included in the appendix.

Future Visitation

- When asked whether or not they were likely to visit Haines in the future, three out of five cruise visitors said it was unlikely or very unlikely that they would return.
- One-third (34 percent) said that returning to Haines was likely or very likely. Considering the remoteness of the community, having one-third of passengers state they are likely or very likely to return should be viewed as a positive endorsement of the Haines experience.

Are you very likely, likely, unlikely or very unlikely to visit Haines in the future?

	% of Total
Very likely	10%
Likely	24
Unlikely	41
Very unlikely	17
Don't know	7
Refused	1

- Ninety-six percent of passengers said that they would recommend Haines to friends and family as a place to visit.

Would you recommend Haines to friends and family as a place to visit?

	% of Total
Yes	96%
No	4

Passenger Demographics

Visitor Origin

- The majority of cruise visitors surveyed (85 percent) were from the United States with the remaining 15 percent made up of international visitors.
- The largest percentage of visitors came from California, totaling 21 percent of total visitors surveyed and 25 percent of domestic visitors. The top ten states are shown below; additional states are provided in the appendix.
- Canadians were the largest group of international visitors, making up 7 percent of all visitors and 46 percent of international visitors.

Origin

	% of Total
US	85%
California	21
Texas	7
Florida	5
Pennsylvania	5
New York	4
Washington	4
Kansas	4
Ohio	4
North Carolina	3
Virginia	3
International	15%
Canada	7
Australia	3
United Kingdom	2
Germany	1
Switzerland	1
Other Europe	2
Other Asia	1

Note: Table shows top ten states only. Additional US states mentioned by respondents are provided in the appendix.

Party Size

- The average party size of cruise visitors to Haines was 2.5 people, with three-quarters of visitors traveling in parties of two.
- Nearly one out of ten parties consisted of five or more people.

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

	% of Total
1	6%
2	76
3	5
4	6
5	2
6+	5
Average party size	2.5 people

Average Household Income

- The average annual household income for passengers was \$104,600.
- The largest income categories were \$95,000 to \$110,000 and more than \$150,000, each accounting for 14 percent of cruise visitors.
- Twenty-nine percent of participants chose not to answer when asked their household's annual income.

Please point to the category that best describes your household's annual income.

	% of Total
Less than \$35,000	2%
\$35,000 to \$50,000	6
\$50,000 to \$65,000	8
\$65,000 to \$80,000	7
\$80,000 to \$95,000	6
\$95,000 to \$110,000	14
\$110,000 to \$125,000	6
\$125,000 to \$150,000	7
More than \$150,000	14
Don't know/Refused	29
Average household income	\$104,600

Haines Fast Ferry Visitors

Haines Visit

GETTING TO HAINES

- Ninety-three percent of Haines departing fast ferry passengers arrived via Skagway, while 7 percent originated in Haines and used the fast ferry for transportation to Skagway.
- Most of the visitors from Skagway (93 percent) were passengers from a cruise ship docked in Skagway. The remainder of visitors arrived in Skagway via ferry or small plane before travelling to Haines on the fast ferry.

Did you stop in Skagway before visiting Haines?

	% of Total
Yes	93%
No	7

What mode of transportation did you use to get to Skagway?

Base: Stopped in Skagway

	% of Base
Cruise ship	93%
Ferry/Alaska Marine Highway	6
Small plane	2

REASON FOR VISIT

- Eighty-six percent of fast ferry passengers cited participation in a tour as their primary reason for visiting Haines.
- Nearly one out of ten (7 percent) were encouraged by a friend, family member, travel agent, or cruise line representative to visit Haines.

What were the main reasons you decided to visit Haines today?

	% of Total
To participate in a tour	86%
Always wanted to visit Haines	5
Cruise line/travel agent recommendation	5
Friend/family recommendation	2
Other*	10

Multiple responses accepted.

*Verbatim responses are included in the appendix of this report.

Visitor Experience

Participation in Tours and Activities

- One-third of those surveyed participated in a wildlife viewing activity, while one out of five took a nature hike/walk or a 4x4 adventure. (Tours to the Kroschel Wildlife Center were considered wildlife viewing).
- Two percent of fast ferry passengers reported that they did not participate in any tours or activities while in Haines.

What tours or activities did your party participate in while in Haines?

	% of Total
Wildlife viewing	34%
Nature hike/walk	22
4x4 adventure	18
Jetboat tour	14
Kayaking	12
River rafting	9
Bald Eagle Foundation	5
City tour	4
Sheldon Museum	3
Hammer Museum	3
Haines Brewery	2
Fishing	2
Flightseeing	1
Native cultural tour	1
Alaska Indian Arts	1
Other	5
None	2

Locations Visited

- Nearly half of fast ferry passengers (45 percent) said they visited downtown. Four out of ten visited Fort Seward, and one out of ten visited the Fairgrounds.

While in Haines did you visit...?

	Yes	No	Don't know
Downtown Haines	45%	53%	2%
Fort Seward	39	57	3
Dalton City/Fairgrounds	10	83	7

Visitor Expenditures

- Fast ferry passengers spent an average of \$436 per party and \$135 per person while in Haines.
- Average spending on tours was \$381 per party and \$142 per person. This category included the cost of roundtrip transportation from Skagway. Only 4 percent of passengers reported zero spent on tours.
- Spending on retail and other expenses was low among fast ferry visitors. Seventy-two percent of parties reported zero spending on shopping, and one out of five spent between \$1 and \$50. The average amount spent on shopping was \$27 per party and \$8 per person.
- More than two-thirds of respondents (69 percent) reported zero spending on other expenses (such as dining and transportation). Other expenditures averaged \$28 per party and \$8 per person.

Can you estimate what your traveling party spent on the following parts of your Haines visit?

	Tours in Haines	Shopping in Haines	Other Expenses	Total Spending
\$0	4%	72%	69%	6%
\$1 - \$50	4	18	19	6
\$51 - \$100	3	2	5	3
\$101 - \$200	18	3	2	16
\$201 - \$500	53	4	5	51
\$501+	19	--	--	19
Average party spending	\$381	\$27	\$28	\$436
Average per person	\$119	\$8	\$8	\$135

Note: Averages include those who spent zero dollars for each category.

Visitor Satisfaction

Satisfaction with Haines Experience

- Ninety-one percent of fast ferry visitors reporting being either satisfied or very satisfied with their overall Haines experience, including three-quarters who were very satisfied. Only 4 percent were dissatisfied or very dissatisfied.
- Nearly all passengers were satisfied or very satisfied with community friendliness (97 percent) and customer service (96 percent). Community friendliness received the highest very satisfied rating at 81 percent.
- Tours and attractions rated just slightly lower at 94 percent satisfied or very satisfied.
- Three-quarters of fast ferry passengers reported that they did not participate in shopping activities while in Haines (and are excluded from the data below). Of those who did shop in Haines, nearly two-thirds (63 percent) reported being very satisfied with their shopping experience and 21 percent satisfied. Six percent said they were dissatisfied or very dissatisfied.

Are you very satisfied, satisfied, dissatisfied or very dissatisfied with...

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied
Your overall Haines experience	76%	21%	2%	2%
Community friendliness	81	16	1	2
Customer service	77	19	1	2
Tours and attractions	73	21	3	3
Shopping	63	21	4	2

Note: These results are based only to those who responded; those who declined to answer or didn't know were excluded.

Community Characteristics

- When asked whether they felt Haines was a visitor-friendly community, nearly all of those surveyed (99 percent) agreed or strongly agreed, with seven in ten strongly agreeing.
- When asked if Haines lived up to their expectations, nearly all (97 percent) of fast ferry passengers agreed or strongly agreed.
- Nearly all (98 percent) agreed or strongly agreed that it is easy to get around in Haines, although, only 60 percent strongly agreed.

Do you strongly agree, agree, disagree or strongly disagree with the following statements:

	Strongly agree	Agree	Disagree	Strongly disagree
Haines is a visitor-friendly community	70%	28%	--	1%
Haines lived up to my expectations	64	34	2	1
It's easy to get around town in Haines	60	38	2	1

Note: These results are based only to those who responded; those who declined to answer or didn't know were excluded.

Future Visitation

- Half of fast ferry visitors said that it was either likely or very likely that they would visit Haines again in the future. One out of five said that it was unlikely or very unlikely that they would return to Haines, and over one-quarter said they didn't know.

Are you very likely, likely, unlikely or very unlikely to visit Haines in the future?

	% of Total
Very likely	21%
Likely	31
Unlikely	14
Very unlikely	6
Don't know	28

- Ninety-eight percent of fast ferry visitors said that they would recommend Haines to their friends and family as a place to visit.

Would you recommend Haines to friends and family as a place to visit?

	% of Total
Yes	98%
No	2

Passenger Demographics

Visitor Origin

- The vast majority of fast ferry visitors (89 percent) were from the United States.

Origin	
	% of Total
United States	89%
International	11

Party Size

- The average party size of fast ferry visitors to Haines was 3.6 people.
- More than half (56 percent) of visiting parties were travelling in groups of two.
- Nearly one-third (29 percent) of survey participants were traveling in groups of four or more.

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

	% of Total
1	6%
2	56
3	9
4	16
5	4
6+	9
Average party size	3.6 people

Average Household Income

- The average household income of survey participants was \$115,300.
- Almost one-quarter (22 percent) of respondents identified their annual average household income as more than \$150,000, making it the most frequent income category.
- More than one-quarter (27 percent) of those surveyed did not specify their household income.

Please point to the category that best describes your household's annual income.

	% of Total
Less than \$35,000	1%
\$35,000 to \$50,000	8
\$50,000 to \$65,000	6
\$65,000 to \$80,000	9
\$80,000 to \$95,000	9
\$95,000 to \$110,000	9
\$110,000 to \$125,000	7
\$125,000 to \$150,000	7
More than \$150,000	22
Don't know/Refused	27
Average household income	\$115,300

Market Differences

Following is a summary of notable differences between responses of Haines cruise visitors and fast ferry passengers (who for the most part were Skagway cruise passengers.)

- Party size was 2.5 for Haines cruise passengers and 3.6 for fast ferry passengers.
- Household income was about \$105,000 for Haines passengers and \$115,000 for fast ferry passengers.
- Nearly nine out of ten Haines passengers visited downtown while slightly less than half of fast ferry passengers did so. Fort Seward was visited by nearly two-thirds of Haines passengers and four out of ten fast ferry passengers.
- Spending patterns were significantly different between the two groups. Total spending for Haines cruise passengers was \$209 per party and \$85 per person, compared to \$436 per party and \$135 per person for fast ferry passengers. The primary reason for this significant difference is in spending on tours: fast ferry passengers spent an average of \$119 per person while Haines passengers spent \$59 per person. Nearly all fast ferry passengers specifically visited Haines to participate in a tour, while only 50 percent of Haines cruise visitors participated in a paid tour. The difference in tour spending was also affected by the inclusion of ferry costs in the fast ferry passengers' spending.
- Haines passengers spent more than fast ferry passengers did on shopping (average of \$45 versus \$27 per party). This difference is primarily based on logistics. Fast ferry passengers have much less time after their tour to visit downtown Haines, Fort Seward or the Fairgrounds.
- Overall, a higher percentage of fast ferry passengers were very satisfied with their Haines experience than were Haines cruise passengers (76 percent versus 65 percent). The reason for this disparity may be that generally, visitors who participated in a tour were more satisfied with their visit than those who did not.
- Though fewer fast ferry passengers shopped in Haines, those that did reported higher very satisfied ratings than Haines passengers (63 percent versus 45 percent).
- Fast ferry passengers also had a much higher rate of saying they were likely or very likely to return to Haines (52 percent versus 34 percent).

Recommendations

Haines should continue efforts to attract and retain cruise ships that dock in Haines.

Haines has a somewhat tumultuous past relationship with the cruise industry. Rebuilding a positive image takes time and effort on both sides. The community's recent efforts to develop infrastructure that will better serve cruise visitors is a positive step towards increasing the community's image. HCVB should continue efforts to build relationships with key cruise line representatives in Alaska and elsewhere. Regular contacts with these representatives will allow Haines to keep them abreast of new tours, activities, and infrastructure developments. They will also be able to hear industry concerns and react in a timely manner.

Shore executives and the ship's crew should be considered important components in the campaign to encourage more visitors to disembark, participate in tours, and spend money in the community. Facilitating positive experiences for these key personnel could generate positive word of mouth that results in higher rates of disembarkation and participation in Haines tours and activities.

Hosting occasional community events for crew such as appreciation barbeques, guided hikes, soccer games, and other events would allow crew members to get a sense of the community feel of Haines. Relationships with shore executives are more formal but the community should attempt to connect with these key personnel. Perhaps private teas, homemade baked goods tastings, or private outdoor adventures may help to convey the community character that is unique to Haines. Shore executives are busy and visits may need to be arranged prior to the season. It is likely that some Haines tour operators have established connections with key personnel, and working in conjunction with these operators may be the best way to gain access to decision-makers.

The HCVB will participate in Seatrade in Miami in March 2012. This event is the largest annual gathering of cruise industry participants and will provide Haines an opportunity to learn more about the state of the industry as well as present what Haines has to offer.

Perhaps the best thing that Haines can do to create a positive image of the community within the cruise industry is to ensure that the visitor experience is unique and satisfying. Passengers notice that the feel of the community is different than larger and more commercial ports like Skagway, Juneau and Ketchikan. They very much liked the small town quaintness of the community and rated community friendliness highly.

One area that could potentially benefit the retail sector is customer service training for front-line employees. A few of those surveyed mentioned customer service issues when asked what they liked least about their visit. A community training effort offered each spring through the Chamber of Commerce or the HCVB could lead to higher retail sales and greater visitor satisfaction.

Efforts should continue to make Haines a more visitor-friendly community through infrastructure development.

Haines has made great strides over the last few years in infrastructure improvements that have benefited visitors. The most important was the paving of the Port Chilkoot dock uplands and the installation of large public bathrooms. This was a significant improvement over the gravel parking lot and Porta-Potties used in previous years and was surely noticed by the cruise industry. Plans are in place to rebuild the trestle under the Port Chilkoot dock in 2012-13. In addition to providing an upgraded and safer dock area, the rebuild will significantly reduce the steep angle of the ramp accessing the fast ferry float. These improvements will also be seen as a positive development by the industry.

Installation of new signage began in 2011 and will be completed before the 2012 season. The City began installation of informational signage in July of 2011. These signs were installed at the cruise dock, visitor center, small boat harbor, and at the Fairgrounds. In addition to providing maps and narrative, the signs feature quick response (QR) codes that allow visitors to scan the code using their smartphones and be directed to internet-based sites that provide further information to the visitor. QR codes are fairly new but are fast gaining in popularity. The codes provide the community a convenient opportunity to provide specific real-time information to visitors. Thought should be given as to exactly where to connect the visitor in order to derive the most benefit. Is it best to link directly to the main HCVB website, or should each QR link to some more specific topic, or an invitation to make a purchase while in Haines?

When visitors were asked about various potential improvements, a continuous walkway along the waterfront was by far the top choice. Creating a walkway from the Port Chilkoot dock to Picture Point would provide a corridor that would draw visitors on foot along Front Street passing by the edge of downtown both on the way to and from Picture Point. Additional signage at the corner of Main and Front would encourage visitors to enter the downtown area and possibly increase retail spending. Also important is providing directional and interpretive signage or kiosks near Port Chilkoot that highlights Haines' history.

Even though fewer visitors rated better signage/kiosks and visitor information as very important, many of them specifically mentioned these issues when asked for any other comments on improving Haines' attractiveness to visitors. Improvements in these areas will have a positive effect on the visitor experience and likely lead to an increase in visitor spending.

The City-funded shuttle bus was well received by those who used it. More obvious and higher quality signage as well as printed routes and schedules would improve this service greatly. In all ports passengers can be tentative about moving beyond areas where the ship is visible over fears of missing their sailing. Improving the professional look of shuttle signage and providing visitors with a copy of a printed schedule would likely reduce their level of apprehension and result in greater use of the shuttle, and greater dispersion of visitors.

The shuttle is of particular importance to the fairgrounds as significantly fewer cruise visitors would make their way there without the shuttle. Conversely, businesses at the fairgrounds need to commit to being open consistently while visitors are in port.

Haines' unique character is a significant asset and should be part of the community's marketing message.

After scenic beauty, Haines' greatest asset is the strong sense of community. Visitors describe what they feel in different ways – peaceful, tranquil, calm, quiet, quaint, friendly, not commercial, and a real Alaska town. Haines should try to develop marketing materials that capture this sense of community. Short stories that relate to the small-town atmosphere may be appropriate in the visitors guide and on the HCVB website. Photography that captures this feel could be used in advertising. Although the community's positioning statement is "The Adventure Capital of Alaska", highlighting Haines' unique small-town character as a secondary message in all advertising and public relations activities could produce significant results.

Cruise line marketing efforts should be considered in the context of Haines' overall visitor industry.

Haines is very fortunate to also benefit from independent visitors arriving by air, road, and the Alaska Marine Highway. While increasing efforts to market to cruise visitors the community should look for ways to develop infrastructure that benefits all visitors and the community as a whole. Improved signage is one example of infrastructure development that will benefit all segments of the community's visitor industry. Likewise, a continuous waterfront walkway would be a positive development for cruise and independent visitors, and would also be enjoyed year round by community members.

Appendix A: Cruise Passenger Survey

What tours or activities did your party participate in while in Haines? (Other)

- Library x3
- Photograph tour x3
- Bicycle tour x2
- Off the Beaten Track tour x2
- Farmers' Market
- Fire Department/Police Station tour
- Valley of the Eagles tour

(If you would not recommend Haines to friends and family) Why not?

- It's very small; there's not enough to do. x3
- It requires coming on a cruise to get here.
- It's too quaint and remote for my family's taste.
- We were disappointed in Alaska in general.
- We didn't do enough here to know about it or recommend it.

What did you like least about your Haines visit? (Other)

- There's no outdoor café/coffee shop along the waterfront or near the dock. x2
- The tours were not interesting.
- We were unaware of the possibilities. We could have done more.
- The town is too small.
- The post office was hard to find.
- We missed the fairgrounds.
- There were loose dogs.
- It was hard to find an internet café.
- The Fort appearance needs to be kept up.
- We did not see enough wildlife.
- We could have done two tours.
- There's no centennial poster available.

Do you have any suggestions for improving the Haines visitor experience?

INFORMATION

Shuttle

- More information/signs about the shuttle, schedule, loading locations needed. x13
- More frequent shuttle service, more stops. x4
- Shuttle information should be advertised on the ships. x2

Around town

- More directional signage/information kiosks to town facilities and attractions x14
- Better availability of maps: large posted maps or brochure handouts. x10
- More information/advertisements for attractions, the town, and facilities. x10
- More historical signs needed; better explanations around the Fort and the museums. x6
- More information/advertisements for attractions, town, and facilities available on the ships. x5
- Improve sidewalks, make them continuous through downtown, dock area; add crosswalks. x5
- Add audio to the historical information.
- Add bear notifications, warning signs.
- Signs for hiking trails; hiking guides for hire.

APPEARANCE

- Keep Haines as it is – don't commercialize it or make it more "touristy." x7
- Update/enhance the appearance of downtown ,the Fort, and attractions. x3
- Make décor and signage formatting consistent. x2

INFRASTRUCTURE

- More shopping facilities needed. x3
- Add a coffee shop or café near the waterfront/dock area. x2
- Add a rain canopy at the dock.
- More B&Bs needed.
- More beer pubs needed.
- More jewelry stores needed.
- Add companion bathrooms.
- More restaurants needed.
- Offer more transportation for elders in wheelchairs.
- More people mover carts needed.
- Make scooters available for rent.
- Needs a Subway restaurant.

OTHER

Shops/Restaurants

- Lengthen shop/restaurant hours. x2
- Customer service training is needed to make visitors feel more welcome. x2
- Needs to be less expensive.
- Shops should be able to ship souvenirs.

Miscellaneous

- More fishing options needed – fly or spin fishing; locally sponsored fishing activities. x2

- Give out free salmon.
- More cruise ships should stop in Haines.
- Utilize the knowledge of the locals.
- Emphasize artistic and cultural experience as the Haines "brand."
- More sunshine needed.
- More time needed.
- Ship should provide more information about time in port.

Other US States of Origin

Arizona, Connecticut, Illinois, Michigan, Wisconsin, Indiana, Iowa, Tennessee, Georgia, Hawaii, Kentucky, Massachusetts, Minnesota, Alabama, Maine, Maryland, Missouri, Montana, Vermont, Wyoming

Appendix B: Fast Ferry Survey

What were the main reasons you decided to visit Haines today? (Other)

- To view wildlife. x3
- To get away from other tourists. x2
- To visit friends/family. x2
- To visit the Wild Life Center.
- To visit a remote place.
- We visited last summer and loved it.
- To visit Francis Muncaster Exhibit.
- To go hiking.
- To catch the ferry to Prince Rupert.
- It was recommended by locals.
- I read good things about Haines.
- To visit the Hammer Museum.
- To go swimming.
- To catch the ferry to Skagway.
- We didn't want to go to Skagway.

What tours or activities did your party participate in while in Haines? (Other)

- Walked around
- Shopping
- Pool
- Mosey's Cantina
- Home Visit
- Historical walking tour
- Eagle Preserve river tour
- Drove through town
- Bicycled
- Bald Eagle Preserve

(If you would not recommend Haines to friends and family as a place to visit) Why not?

- The tour was not as expected.
- Not enough to do, it depends on the person though.
- There are no restaurants available.

Do you have any suggestions for improving the Haines visitor experience?

SHOPPING

- Not enough time for shopping. x4
- More quality shops, rather than the same souvenirs in each store. x3
- Improve customer service. x2
- The tours should allow time for shopping.
- The shops should have better hours.

INFORMATION

- More information needed about tours available.
- More information needed on services available such as rental cars.
- More information needed from the visitors center.
- Need maps available in Skagway.
- Need maps on ferry or near dock.
- Needs more historical markers.

RESTAURANTS

- Needs a café by the dock. x2
- Need more restaurants that serve fresh local fish.
- Needs more restaurants.

MISCELLANEOUS

- Not enough time. x2
- The tours should be longer.
- There should be an onshore fishing excursion at Chilkoot Park.
- Need a taxi service for those not taking tours.
- Fix the incline at the dock during high tide.
- Need a covered area on the dock.
- Leave it as it is.
- Emphasize Haines as an a typical destination.
- Downtown needs a cleanup.
- Be a more cultural town. Talked to local politicians and they are the ones ruining the town's growth.
- Better weather.
- Better cell signal.