

*Juneau Air Visitor Profile  
Summer 2008*

*Alaska Travelers Survey*

*Prepared for:  
Juneau Convention & Visitors Bureau*



Research-Based Consulting

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# Executive Summary

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The Juneau Convention & Visitors Bureau contracted with the McDowell Group to provide summer 2008 visitor information from *Alaska Travelers Survey*, an ongoing, proprietary research program. This report includes findings from a survey of 302 out-of-state visitors who departed Juneau by air. Particular focus is given to characteristics of independent travelers. Surveys were conducted at the Juneau International Airport between May and September 2008. Below are key findings and marketing recommendations.

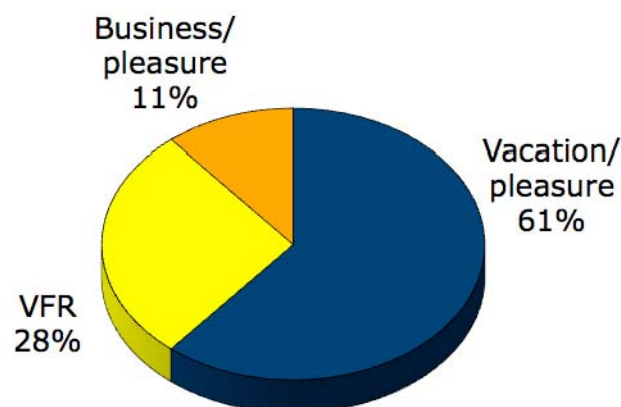
## Cruise vs. Independent

- Twenty-two percent of travelers departing Juneau by air had taken an overnight cruise during their trip. Virtually all of these visitors had sailed aboard small ships (vessels with capacities under 300), which often use Juneau as an embarkation/disembarkation port.
- The remainder of the air market (78 percent) were categorized as independent travelers for the purposes of this study, although a small portion of them were traveling on package trips or for business/pleasure purposes.

## Alaska Trip Purpose

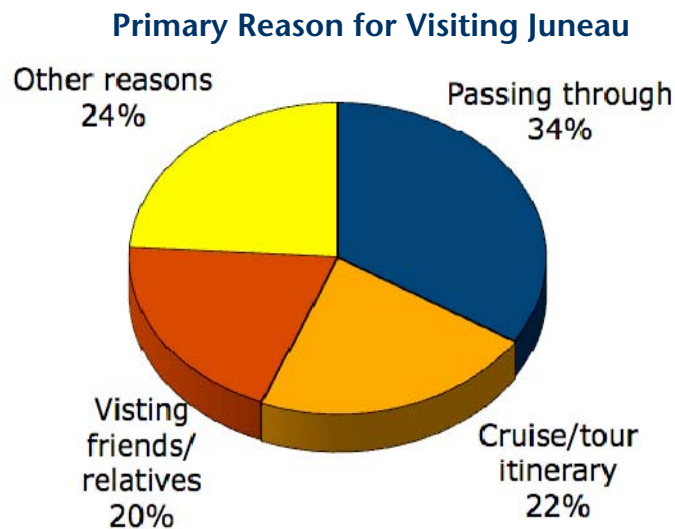
- Sixty-one percent of Juneau air visitors said the primary reason for their Alaska trip was vacation or pleasure. (The vacation/pleasure category includes cruise passengers.)
- Twenty-eight percent of air visitors were primarily traveling to visit friends or relatives. Visitors traveling for a mix of business and pleasure made up the remaining 11 percent. (Business-only visitors were screened out of the survey.)

### Alaska Trip Purpose



## Primary Reason for Juneau Visit

- When asked the primary reason that Juneau was included on their trip, 34 percent of air visitors reported they were passing through Juneau on their way to or from other destinations.
- Twenty-two percent of Juneau air visitors said they traveled to Juneau as part of their cruise or tour package itinerary; 20 percent were visiting friends and relatives.
- The balance of the market (24 percent) reported reasons such as combining business and pleasure travel, always wanted to visit Juneau, experience Glacier Bay or other glaciers, and fishing.
- Among independent visitors, passing through Juneau was the most common trip purpose, mentioned by 41 percent. One-quarter of independent visitors said their primary reason for visiting Juneau was to see friends or relatives.



## Repeat Travel

- Juneau visitors reported a high repeat visitor rate of 41 percent. Among repeat travelers, the average number of prior trips was 4.7.
  - Independent visitors were more likely to have visited Juneau (47 percent) than cruise visitors (21 percent). Further, one of ten independent travelers had visited Juneau by cruise ship on their last visit.
- Three-quarters of air visitors said they were likely or very likely to return to Juneau in the future.
  - Independent visitors are the most likely to return. Forty-five percent reported they were very likely to return to Juneau, while only 12 percent of cruise travelers were very likely to return.

## Overnights in Juneau

- Nearly three-quarters (71 percent) of Juneau air visitors spent at least one night in Juneau. The average length of stay was 2.5 nights.
- The most frequent reason given by Juneau air visitors who did not overnight in Juneau was airline/ferry connection. Three-quarters of independent visitors (77 percent) and all cruise visitors cited airline/ferry connection as the main reason they did not overnight in Juneau.

## Visitor Spending

- On average, visitors spent \$383 per person during their stay in Juneau. Lodging was the largest expenditure category, followed by tours and activities, dining, and gifts and souvenirs.
- The average independent traveler spent \$398 while in Juneau, and the average cruise visitor spent \$320.

## Visitor Satisfaction and Impressions of Juneau

- Nearly all air visitors (95 percent) were satisfied or very satisfied with their overall Juneau experience, with 57 percent stating they were very satisfied.
- Visitors were generally satisfied or very satisfied with customer service (90 percent), community friendliness (94 percent), and tours and attractions (94 percent). Shopping received the lowest level of satisfaction, with 82 percent of visitors saying they were satisfied or very satisfied.
- Community friendliness received the highest individual rating, with 59 percent of visitors stating they were very satisfied with this aspect of their experience.
- Visitors were asked to express their level of agreement with four statements about Juneau. The statements with the highest degree of agreement were: *Juneau is a visitor-friendly community* (45 percent strongly agreed) and *Juneau is a place I would recommend to family and friends* (44 percent strongly agreed). Fewer than 5 percent of visitors disagreed with these statements.
- When asked whether they agreed with the statement *At times I felt the number of other visitors detracted from my Juneau experience*, only 13 percent of visitors strongly agreed, while 26 percent agreed. Half of visitors (51 percent) disagreed. Cruise passengers were more likely to disagree with the statement.

## Trip Planning

- The Internet was cited as the most valuable source of information when visitors were planning their trip. Prior Juneau experience, friends and relatives, and travel guides were also frequently mentioned.

- Cruise visitors' responses differed considerably from independent visitors. They cited cruise lines as their primary source of information, followed by the Internet, travel agents and travel guides.
- Approximately one-third of Juneau air visitors said they generally read online travel reviews on websites such as TripAdvisor.com. Percentages were similar among independent and cruise visitors.
- About half of Juneau air visitors reported they use discount websites such as Expedia.com to make travel arrangements. Fifty-four percent of independent travelers stated they use such websites, compared to 39 percent of cruise travelers.

## Visitor Volume

- An estimated 85,000 out-of-state visitors exited Juneau via the airport in summer 2008. The peak travel months were July and August. This visitor volume estimate is derived from visitor/resident ratios collected in 2003 and 2006, and passenger enplanement data from Alaska Airlines and Juneau International Airport.

## Marketing Implications

The primary focus of this study was to better understand Juneau visitors and what could be done to facilitate more Juneau overnights. Many non-overnighters are small cruise ship passengers with itineraries ending in Juneau, or sports fishermen traveling to and from remote lodges. Based on survey results, JCVB may wish to explore or expand on the following:

- **Expand cooperative marketing efforts.** Even though many visitors to outlying communities only pass through Juneau, some will overnight. In general, an increase in visitors to northern Southeast will translate into more Juneau overnights. JCVB should engage in cooperative marketing with regional communities and sportfishing lodges. Several key sportfishing lodges in the area are currently advertisers in the Juneau Guide and Travel Planner. Investigate possible combined mailings, joint trade show appearances, and Internet linkages to share in marketing exposure for the region.
- **Marketing Juneau to Juneau Residents.** Visiting friends and relatives continue to be an important component (36 percent) of Juneau's independent visitor market. While it may be difficult for JCVB to directly influence residents to host friends and relatives, JCVB should continue resident educational efforts intended to increase awareness and enthusiasm for local travel-related experiences.
- **Market to visitors while they are in Juneau.** Nearly half of independent visitors and 21 percent of cruise visitors had previously visited Juneau. Similar percentages among each market stated they were very likely to return. Take advantage of this large group of pro-Juneau visitors by staying in contact with them after their trip. Use of a Juneau travel incentive should bolster efforts to obtain contact information for future e-newsletters, mailings, and other promotions.

- **Continue marketing efforts with cruise lines and package tour operators.** About two-thirds of cruise visitors relied on information provided by their cruise line. JCVB should be proactive about trying to influence pre and post overnights in various types of tour packages.
- **Work with the business community and the public to increase visitor satisfaction and reinforce positive impressions of Juneau.** Visitors' satisfaction ratings for some components of the Juneau experience were lower than in previous years. With the high proportion of repeat visitors, and a reliance on past visitors for trip planning information, it is critical that Juneau provide visitors with the highest quality experience possible. Recommendations include offering customer service training, recognition of exceptional service, and increased awareness of satisfaction trends.
- **Continue to utilize the Internet and electronic marketing tools.** With 60 percent of visitors stating that the Internet was the *most valuable* source of Juneau information, JCVB should continue to enhance its website, stay informed on the latest technology, and promote online trip planning tools and specials.

Additionally, one-third of visitors stated that they read travel reviews online. A comprehensive marketing effort should be undertaken to increase the number of Juneau online reviews. These efforts should be viewed within the context of JCVB's overall public relations program. More than one-half of independent visitors (54 percent) and four out of ten cruise visitors (39 percent) said they use discount websites like Expedia.com to make travel arrangements. JCVB should explore the best ways for the organization, as well as for individual members, to take advantage of these types of websites. A campaign to educate members about how they can best incorporate these sites into their marketing efforts may also be warranted.

# Introduction and Methodology

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The Juneau Convention & Visitors Bureau (JCVB) contracted with the McDowell Group to conduct a survey of 2008 summer visitors and to estimate Juneau's air visitor volume for the study period. The survey targeted pleasure-related visitors as they departed Juneau, including those visiting friends and family, small cruise ship passengers, and visitors traveling for business and pleasure purposes (business-only visitors were screened out of the sample).

This was the fifth year that JCVB participated in the McDowell Group's *Alaska Travelers Survey* (ATS) research program, with previous surveys completed in 2000, 2001, 2003, and 2005.

Visitors were interviewed by McDowell Group survey staff in the airport departure lounge. Alaska residents were screened out of the sample. Surveys were conducted between May and September, 2008. A statistical sampling procedure was used to randomly select days, flights and passengers throughout the season. Two-thirds (65 percent) of the selected flights were southbound and one third (35 percent) were northbound.

McDowell Group surveyors intercepted a total of 302 visitors, 236 independent visitors (defined as those who did not purchase a cruise package) and 66 cruise visitors, departing Juneau by air. Cruise visitors interviewed had cruised on small ships with less than 360 passengers. Cruise passengers were not asked which ship/cruise line they had traveled on, but it is likely that the majority had traveled on a Cruise West vessel due to their significant presence in the Alaska small ship market.

The maximum margin of error on this sample is  $\pm 5.8$  percent, at the 95 percent confidence interval. Due to the nature of response distribution in sampling statistics, most survey responses are more accurate than this maximum margin of error.

The survey instruments were developed by McDowell Group staff with input from JCVB. Some questions were repeated from previous ATS Juneau surveys. A summary table, highlighting market shifts and trends between 2005 and 2008, is presented at the end of the report.

## Alaska Trip Purpose

Nearly two-thirds of Juneau air visitors (61 percent) said the primary reason for their Alaska trip was vacation or pleasure. Twenty-eight percent were primarily traveling to visit friends or relatives and those traveling for a mix of business and pleasure made up the remaining 11 percent.

The vacation/pleasure category included a large percentage of visitors that participated in a cruise or sportfishing package.

### Alaska Trip Purpose

	All Visitors
Vacation/pleasure	61%
Cruise ship package	22
Sportfishing package	15
Visiting friends/relatives	28
Business/pleasure	11

Seventy-eight percent of all Juneau air visitors did not purchase a cruise package; for purposes of this report they are described as independent travelers. Among independent visitors, one-half stated they were traveling for vacation or pleasure. Over one-third (36 percent) of independent visitors said visiting friends and relatives was their primary trip purpose, and 14 percent described their trip purpose as a mix of business and pleasure.

One fifth (19 percent) of independent vacation pleasure visitors said that sportfishing was the primary reason for their Alaska trip.

### Alaska Trip Purpose Base: Did Not Cruise

	Independent
Vacation/pleasure	50%
Sportfishing package	19
Visiting friends/relatives	36
Business/pleasure	14

Throughout the remainder of the report survey data is presented in three categories: total, independent and cruise.

The leading response that air visitors gave when asked why they visited Juneau was that they passing through Juneau on their way to or from other destinations. Twenty-two percent of visitors said they traveled to Juneau as part of their cruise or tour package itinerary, 20 percent were visiting friends and relatives, and 7 percent traveled to Juneau for business purposes. Reasons such as “always wanted to visit Juneau,” Glacier Bay/glaciers, and fishing were also mentioned.

Among independent visitors, passing through Juneau was the most common trip purpose, mentioned by four out of ten visitors. One-quarter of independent visitors said their primary reason for visiting Juneau was to see friends or relatives and 9 percent visited primarily for business reasons.

Nearly all cruise visitors (92 percent) who departed Juneau by air stated that their cruise package itinerary included the Juneau portion of their trip. Eight percent traveled through Juneau on their way to or from other destinations.

### Primary Reason for Visiting Juneau

	Total	Independent	Cruise
Passing through/air connections	34%	41%	8%
Part of cruise or tour package	22	2	92
Visiting friends/relatives	20	25	--
Business/pleasure	7	9	--
Always wanted to visit Juneau	4	5	--
Glacier Bay/glaciers	3	4	--
Fishing	2	3	--
Friend/relative recommended	1	1	--
Wildlife/sealife viewing	1	1	--
Boat/day cruise	1	1	--
Outdoors/wilderness	1	1	--
Other	4	5	--
Don't know/refused	1	1	--

## Previous Alaska Travel

One-half of air visitors had previously visited Alaska and 41 percent had previously visited Juneau. Independent visitors were more likely to have previously visited Alaska (57 percent) and Juneau (47 percent) than cruise visitors (27 percent and 21 percent respectively).

Among those who had traveled to Alaska before, visitors made an average of 5.3 previous trips. The average number of prior trips was 4.7 among those who had previously visited Juneau.

### Previous Travel to Alaska and Juneau

	Total	Independent	Cruise
<b>Traveled to Alaska previously</b>	<b>50%</b>	<b>57%</b>	<b>27%</b>
Average # of previous trips	5.3	5.8	1.7
<b>Traveled to Juneau previously</b>	<b>41%</b>	<b>47%</b>	<b>21%</b>
Average # of previous trips	4.7	5.0	1.8

Air visitors who had previously visited Juneau most commonly entered and exited the city by air on their last trip (71 percent and 75 percent respectively). Prior usage of air transportation was similarly high among independent travelers. It is notable that one of ten independent travelers had visited Juneau via cruise ship on their last visit.

Cruise travelers were much more likely to have arrived in Juneau via cruise ship (64 percent) on their last trip to the city, and somewhat more likely to have left Juneau via cruise ship (43 percent).

### Previous Method of Traveling to/from Juneau Base: Traveled to Juneau Before

	Total	Independent	Cruise
<b>Mode of entry</b>			
Air	71%	77%	21%
Cruise	16	10	64
Ferry (AMHS)	11	11	14
Other	2	2	--
<b>Mode of exit</b>			
Air	75%	79%	43%
Cruise	14	10	43
Ferry (AMHS)	10	9	14
Other	2	2	--

## Tours and Activities in Juneau

Juneau air visitors participated in a variety of tours and activities during their stay. Shopping and visiting the Mendenhall Glacier were the top two activities enjoyed by air visitors (50 and 45 percent respectively). Three out of ten mentioned visiting friends or relatives and approximately one-quarter mentioned hiking, museums, and city walking tours. One-quarter of independent visitors stated they did not participate in any tours or activities versus only 9 percent of cruise visitors.

Cruise travelers participated in more Juneau tours and activities than independent visitors, including shopping (62 versus 47 percent), visiting the Mendenhall Glacier (53 versus 42 percent), city tours (47 versus 9 percent), and museums (39 versus 21 percent). In contrast, independent visitors more commonly visited friends or relatives (38 versus 0 percent), hiked (29 versus 17 percent), and fished (13 versus 0 percent).

**Tours and Activities in Juneau**

	Total	Independent	Cruise
Shopping	50%	47%	62%
Mendenhall Glacier	45	42	53
Visiting friends/relatives	30	38	--
Hiking/nature walk	26	29	17
Museums/historical sites	25	21	39
City walking tour	23	21	29
Tramway	21	19	30
City tours	18	9	47
Wildlife viewing	15	15	15
Whale watching/day cruise	12	12	9
Fishing	10	13	--
DIPAC Hatchery	7	7	6
Flightseeing (helicopter)	5	4	9
Flightseeing (small plane)	5	4	9
Salmon Bake	5	4	6
Boating	5	6	--
Glacier Gardens	3	3	2
Camping	3	4	--
Brewery tour	2	3	2
Kayaking/canoeing	2	3	--
Shrine of St. Theresa	2	2	--
State Capitol	1	1	2
Rafting	1	1	-
Bicycling	<1	<1	--
Other	9	10	6
None	22	25	9

## Alaska Destinations

Visitors were asked if they had traveled to any of the communities within northern Southeast Alaska listed in the table below. One-fifth reported that they visited Skagway and Gustavus/Glacier Bay (20 and 21 percent respectively), and 17 percent visited Haines. Independent travelers tended to travel less frequently to Skagway, Gustavus/Glacier Bay, and Haines when compared to cruise passengers.

**Destinations Visited**

	Total	Independent	Cruise
Skagway	21%	14%	44%
Gustavus/Glacier Bay	20	14	42
Haines	17	12	32
Elfin Cove	6	6	6
Hoonah	2	2	3
Angoon	2	3	--
Excursion Inlet	2	1	3
Tenakee Springs	1	<1	2
Other	4	4	5

Nearly three-quarters of Juneau air visitors overnighted in Juneau, averaging 2.5 nights per party. Independent travelers averaged longer stays in Juneau than cruise passengers (2.9 versus 1.1 nights).

Gustavus/Glacier Bay, Skagway, and Haines were overnight destinations for approximately one-tenth of Juneau air visitors. Communities associated with sportfishing (such as Elfin Cove, Angoon, and Excursion Inlet) experienced longer average stays but fewer travelers.

### Overnight Destinations

	Total		Independent		Cruise	
	%	Ave	%	Ave	%	Ave
Juneau	71%	2.5	71%	2.9	73%	1.1
Gustavus/Glacier Bay	11	2.4	12	4.0	8	0.3
Skagway	10	1.3	12	2.2	5	0.1
Haines	9	2.4	11	3.9	--	0.0
On a boat (other than cruise ship)	5	5.8	5	5.8	--	0.0
Elfin Cove	4	3.1	5	3.9	--	0.0
Angoon	2	5.7	3	5.7	--	0.0
Camping/cabins*	2	3.5	3	3.5	--	0.0
Excursion Inlet*	1	4.2	1	4.0	2	4.5
Hoonah*	1	2.2	1	2.8	--	0.0
Tenakee Springs	--	0.0	--	0.0	--	0.0
Other	3	4.5	3	6.1	2	0.3

\*Very small sample size

Juneau air visitors who did *not overnight* in Juneau were asked why they did not spend any nights in Juneau. By far, the most frequent reason given was airline/ferry connection (82 percent). Three-quarters of independent visitors (77 percent) and all cruise visitors said that airline/ferry connection was the main reason they did not overnight in Juneau.

### Main Reason for Not Spending Nights in Juneau Base: Did Not Overnight in Juneau

	Total	Independent	Cruise
Airline/ferry connection	82%	77%	100%
No time	7	9	--
No interest	2	3	--
Been there before	2	3	--
Visiting friends/relatives elsewhere	2	3	--
Too expensive	1	1	--
Other	2	3	--

## Tours and Activities in Other Communities

While visiting other Southeast communities, Juneau air visitors who did *not overnight* in Juneau participated in a wide range of activities. Fishing and wildlife viewing were the most popular activities (46 and 44 percent respectively) followed by hiking/nature walks (31 percent) and glacier touring (30 percent).

Among independent travelers, the most commonly mentioned activity was fishing, with nearly 60 percent having fished in other Southeast communities. Other popular activities included wildlife viewing (35 percent), hiking (28 percent), and glacier touring (22 percent).

The top activities for cruise travelers in other communities were wildlife viewing (78 percent), glacier touring (61 percent), and hiking (44 percent).

One-fifth of independent travelers (22 percent) reported that they did not participate in any activities, versus only 6 percent of cruise travelers.

**Tours and Activities while visiting other Southeast Communities**  
Base: Did Not Overnight in Juneau

	Total	Independent	Cruise
Fishing	46%	57%	6%
Wildlife viewing	44	35	78
Hiking/nature walk	31	28	44
Glacier touring	30	22	61
Visiting friends/family	13	16	--
Kayaking	10	9	17
Flightseeing (small plane)	7	7	6
Rafting	2	1	6
Flightseeing (helicopter)	1	1	--
Other	13	10	22
None	18	22	6

## Spending in Juneau

On average, visitors spent \$383 per person during their stay in Juneau. The largest amount was spent on lodging (\$107), followed by spending on tours and activities (\$81). Significant expenditures were also made on food and beverage (\$78), as well as on gifts and souvenirs (\$75).

Average spending among independent visitors was higher than cruise visitors (\$398 versus \$320). Independent visitors spent more in each category with the exception of gifts and souvenirs. In this category, cruise visitors spent more than twice as much as independent visitors (\$137 and \$58 respectively).

### Average Spending in Juneau, Per Person

	Total	Independent	Cruise
Lodging	\$107	\$118	\$62
Tours and activities	81	85	68
Food and beverage	78	87	43
Gifts, souvenirs, and clothing	75	58	137
Other expenses	42	50	10
<b>Average spending per person</b>	<b>\$383</b>	<b>\$398</b>	<b>\$320</b>

# Visitor Satisfaction

Virtually all air visitors (95 percent) were satisfied or very satisfied with their overall Juneau experience, with 57 percent indicating they very satisfied. With regard to specific aspects of their Juneau experience, community friendliness and tours and attractions had the highest satisfaction ratings (94 percent apiece), followed by customer service (90 percent). Shopping received the lowest level of satisfaction, with 82 percent of visitors saying they were satisfied or very satisfied. Cruise visitors said they were very satisfied (as opposed to satisfied) more frequently than independent visitors.

## Satisfaction with Juneau

	Total	Independent	Cruise
<b>Overall Juneau Experience</b>			
Very satisfied	57%	56%	62%
Satisfied	38	39	33
Neither/neutral	3	3	5
Dissatisfied	2	2	--
Very dissatisfied	--	--	--
<b>Customer Service</b>			
Very satisfied	45%	45%	45%
Satisfied	45	45	47
Neither/neutral	7	7	6
Dissatisfied	3	4	2
Very dissatisfied	--	--	--
<b>Community Friendliness</b>			
Very satisfied	59%	58%	65%
Satisfied	35	36	31
Neither/neutral	6	6	5
Dissatisfied	<1	<1	--
Very dissatisfied	--	--	--
<b>Tours and Attractions</b>			
Very satisfied	48%	47%	49%
Satisfied	46	47	44
Neither/neutral	6	6	7
Dissatisfied	--	--	--
Very dissatisfied	--	--	--
<b>Shopping</b>			
Very satisfied	35%	34%	39%
Satisfied	47	48	41
Neither/neutral	10	9	15
Dissatisfied	4	5	2
Very dissatisfied	1	2	--

Visitors were asked to express their level of agreement with four statements about Juneau. Most visitors agreed or strongly agreed with the first three statements: *Juneau is a visitor friendly community* (94 percent); *Juneau is a place I would recommend to family and friends* (91 percent); and *Juneau lived up to my expectations* (85 percent). In response to the fourth statement, *At times I felt the number of other visitors detracted from my Juneau experience*, 39 percent agreed or strongly agreed while more than half disagreed or strongly disagreed.

The most notable difference in level of agreement between independent and cruise visitors was with regard to the last two statements. Four out of ten independent visitors (41 percent) strongly agreed that Juneau lived up to their expectations, compared to three out of ten (28 percent) cruise visitors.

Cruise visitors were more likely to disagree with the statement, “...the number of other visitors detracted from my experience,” (58 versus 50 percent), but independent visitors were more likely to strongly disagree (13 versus 2 percent).

### Impressions of Juneau

	Total	Independent	Cruise
<b>Juneau is a visitor-friendly community.</b>			
Strongly agree	45%	46%	44%
Agree	49	48	54
Neither/neutral	4	5	2
Disagree	1	1	--
Strongly disagree	--	--	--
<b>Juneau is a place I would recommend to family and friends.</b>			
Strongly agree	44%	44%	43%
Agree	47	47	48
Neither/neutral	6	6	8
Disagree	3	3	2
Strongly disagree	<1	<1	--
<b>Juneau lived up to my expectations.</b>			
Strongly agree	38%	41%	28%
Agree	47	45	55
Neither/neutral	11	10	15
Disagree	3	3	2
Strongly disagree	<1	<1	--
<b>At times I felt the number of other visitors detracted from my Juneau experience.</b>			
Strongly agree	13%	15%	8%
Agree	26	25	28
Neither/neutral	10	11	7
Disagree	41	37	56
Strongly disagree	10	13	2

## Future Travel to Juneau

Nearly three-quarters of air visitors (74 percent) said they are likely or very likely to return to Juneau in the future. Four out of ten (38 percent) said they are *very likely*.

Independent visitors have the highest intended repeat rate. Forty-five percent of independent visitors reported they are *very likely* to return to Juneau, while only 12 percent of cruise travelers said the same.

### Likelihood of Returning to Juneau

	Total	Independent	Cruise
Very likely	38%	45%	12%
Likely	36	36	38
Unlikely	16	11	32
Very unlikely	5	4	6
Don't know/refused	5	3	12

Visitors who responded that they are unlikely or very unlikely to return to Juneau were asked why. More than half (53 percent) said there are other places they'd like to visit and 13 percent said they do not plan to return to Alaska.

Nearly two-thirds of cruise visitors expressed interest in other destinations compared to 46 percent of independent visitors.

### Main Reason for Not Returning to Juneau

	Total	Independent	Cruise
Other places to visit	53%	46%	64%
Not coming back to Alaska	13	14	12
Too old	8	3	16
Too expensive	6	8	4
Poor weather	2	3	--
Other	16	24	4
Don't know/refused	2	3	--

# Trip Planning

When asked to identify the *most valuable* sources of information used for trip planning, the majority of Juneau air visitors (58 percent) said the Internet. Prior Juneau experience, friends and relatives, and travel guides were also frequently mentioned.

Cruise visitors' responses differed considerably from independent visitors. They commonly reported that cruise lines (62 percent) were the most valuable source of information during their trip planning process. This was followed by the Internet (48 percent), travel agents (36 percent), and travel guides (26 percent).

## Trip Planning Behavior

	Total	Independent	Cruise
<b>What sources of information did you find most valuable while planning your Juneau trip?</b>			
Internet	58%	61%	48%
Prior Juneau experience	37	44	15
Friends/relatives	36	44	8
Travel guides/books	21	20	26
Cruise line	16	3	62
Travel agent	13	6	36
Juneau Convention & Visitors Bureau	10	9	11
Ferry brochure/schedule	8	10	--
Juneau travel guide and planner	6	6	8
www.traveljuneau.com	5	5	6
Alaska State Vacation Planner	4	3	9
Milepost	4	4	2
Other	5	6	3
None	5	6	3
<b>In general, do you read online travel reviews such as TripAdvisor.com?</b>			
Yes	35%	35%	35%
No	62	63	58
<b>Do you generally use discount websites such as Expedia.com to make travel arrangements?</b>			
Yes	51%	54%	39%
No	45	44	52

Approximately one-third of Juneau air visitors (35 percent) said they generally read online travel reviews on websites such as TripAdvisor.com. This was true for independent and cruise travelers alike.

About half of Juneau air visitors (51 percent) report they use discount websites such as Expedia.com to make travel arrangements. Fifty-four percent of independent travelers stated they use such websites, compared to 39 percent of cruise travelers.

## Visitor Origin

Nearly half of all air visitors were from the Western US. Cruise travelers' origin tended to be more evenly distributed across the country, compared to significant Western US origin among independent visitors.

International travelers accounted for 13 percent of Juneau air visitors.

	Origin		
	Total	Independent	Cruise
<b>United States</b>	<b>87%</b>	<b>87%</b>	<b>85%</b>
<b>Western US</b>	<b>49%</b>	<b>56%</b>	<b>24%</b>
Washington	15	18	3
California	11	12	9
<b>Midwest US</b>	<b>14%</b>	<b>12%</b>	<b>20%</b>
Minnesota	3	3	5
Illinois	2	3	2
<b>Southern US</b>	<b>13%</b>	<b>12%</b>	<b>17%</b>
Florida	3	2	8
North Carolina	2	2	2
<b>Eastern US</b>	<b>11%</b>	<b>7%</b>	<b>24%</b>
New York	2	2	3
Pennsylvania	2	2	5
<b>International</b>	<b>13%</b>	<b>13%</b>	<b>15%</b>
United Kingdom	3	3	5
Canada	3	3	3

## Party Size

The average party size for Juneau air visitors was 2.4 people.

Fifty-one percent of air visitors traveled in groups of two, 24 percent traveled alone, and the remainder traveled in groups of three or more.

**Party Size**  
(Defined as sharing expenses)

	Total	Independent	Cruise
One	24%	27%	14%
Two	51	43	80
Three	9	10	3
Four	10	12	3
Five or more	6	8	--
Average party size	2.4	2.5	2.0

## Gender and Age

The majority of visitors were male. Cruise visitors were more likely to be evenly split between men and women (52 versus 48 percent), compared to independent visitors (63 versus 37 percent).

The average age among all visitor parties was 52.2 years old. The average age of cruise visitors was 62.1, more than ten years older than the average independent visitor.

**Gender and Age of Party Members**

	Total	Independent	Cruise
Male	60%	63%	48%
Female	40	37	52
Under 18	6	7	2
18 to 34	11	13	2
35 to 44	14	16	8
45 to 54	20	21	14
55 to 64	25	26	23
65 and over	24	18	52
Average age	52.2	49.5	62.1

## Education and Income

Nearly two-thirds of Juneau air visitors were college graduates. Cruise travelers were twice as likely to have a Doctorate degree (21 percent) compared to independent travelers (10 percent).

### Highest Level of Education Attained

	Total	Independent	Cruise
Less than HS diploma	2%	3%	--%
High School diploma/GED	8	8	8
Some college	16	17	15
Associates degree	8	8	8
<b>College Graduates</b>	<b>63%</b>	<b>63%</b>	<b>63%</b>
Bachelor's degree	33	36	24
Master's degree	17	17	18
Doctorate (Ph/D)/Medical degree	13	10	21
Other	<1	--	2
Don't know/Refused	2	1	5

Visitors' average household income was \$103,000. Cruise passengers reported higher average household incomes than independent visitors. (Readers should note that three out of ten cruise travelers refused to report their income category compared to only 12 percent of independent travelers, possibly skewing the average.)

### Household Income

	Total	Independent	Cruise
Under \$35,000	4%	6%	--%
\$35,000 to \$50,000	8	7	12
\$50,001 to \$65,000	10	12	5
\$65,001 to \$80,000	9	9	11
\$80,001 to \$95,000	7	8	3
\$95,001 to \$110,000	8	8	9
\$110,001 to \$125,000	8	9	5
\$125,001 to \$150,000	10	11	8
Over \$150,000	17	16	20
Don't know	2	3	--
Refused	16	12	29
<b>Average household income</b>	<b>\$103,000</b>	<b>\$101,000</b>	<b>\$109,000</b>

# Special Analysis of Overnighters

The survey revealed that 29 percent of Juneau air visitors did not spend a night in Juneau (see page 12 for additional detail). While a few of these visitors may have spent all or part of the day engaging in visitor activities in the community, the majority were just passing through on their way to or from their primary destination.

A comparison of visitor satisfaction and community impression responses reveals that, generally, visitors who spent a night in Juneau were more satisfied and had a better impression of the community. The exceptions were shopping ratings (34 percent versus 39 percent very satisfied) and if the number of other visitors detracting from experience (15 percent versus 6 percent strongly agreed).

## Comparison Between Overnight Visitors versus Non-Overnighters

	Overnighters	Non-Overnighters
<b>Satisfaction with Juneau (% very satisfied)</b>		
Overall Juneau experience	60%	46%
Customer service	46	42
Community friendliness	61	52
Tours and attractions	51	31
Shopping	34	39
<b>Impressions of Juneau (% strongly agree)</b>		
Juneau is a visitor-friendly community.	48%	36%
Juneau is a place I would recommend to family and friends.	45	38
Juneau lived up to my expectations.	41	29
At times I felt that the number of other visitors detracted from my experience.	15	6

# Trend Analysis: 2005 to 2008

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The table on the following page presents a comparison of selected Juneau air visitor data from the 2005 and 2008 *Alaska Traveler Survey* program. Key findings include:

- Trip purpose distribution remained similar from 2005 to 2008.
- More Juneau air visitors spent a night in Juneau in 2008 (71 percent) than in 2005 (63 percent).
- The average length of stay decreased from 4.0 nights in 2005 to 2.5 nights in 2008; however, average spending in Juneau increased considerably.
- More visitors were very satisfied with their overall Juneau experience in 2008 (57 percent) compared to 2005 (46 percent), but were less satisfied with customer service (45 percent versus 53 percent), tours and attractions (48 percent versus 58 percent), and shopping (35 percent versus 41 percent). Community friendliness remained stable at 59 percent versus 58 percent.
- The proportion of visitors who had been to Juneau before was roughly the same in 2005 and 2008 (44 and 41 percent respectively).
- The percentage of air visitors who said they are very likely to return Juneau is also similar.
- The proportion of international visitors increased from 5 percent in 2005 to 13 percent in 2008.
- Average travel party size decreased from 2.9 to 2.4, while age and the ratio of male visitors to female visitors remained similar.
- On average, 2008 visitors had higher household incomes (\$103,000) than their 2005 counterparts (\$88,000).

## Juneau Air Visitors: 2005 and 2008

	2005 n=303	2008 n=302
<b>Trip Purpose</b>		
Vacation/pleasure	65%	61%
Visiting friends/relatives	26	28
Business/pleasure	8	11
<b>Cruise Visitors</b>		
Cruise visitors (as % of all air visitors)	21%	22%
<b>Length of Stay/Spending in Juneau</b>		
Spent night(s) in Juneau	63%	71%
Average stay in Juneau	4.0	2.5
Average spending per person	\$231	\$383
<b>Satisfaction with Juneau (% very satisfied)</b>		
Overall Juneau experience	46%	57%
Customer service	53	45
Community friendliness	58	59
Tours and attractions	58	48
Shopping	41	35
<b>Previous and Future Juneau Travel</b>		
Been to Juneau before	44%	41%
Very likely to return to Juneau	39	38
<b>Demographics</b>		
West	59%	49%
South	16	13
Midwest	12	14
East	9	11
International	5	13
Average party size	2.9	2.4
Average age	51.8	51.8
Male/Female	56/44	60/40
Average household income	\$88,000	\$103,000