



***Ketchikan Cruise
Industry Surveys***

Prepared for:
Ketchikan Gateway Borough

November 2016



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Executive Summary

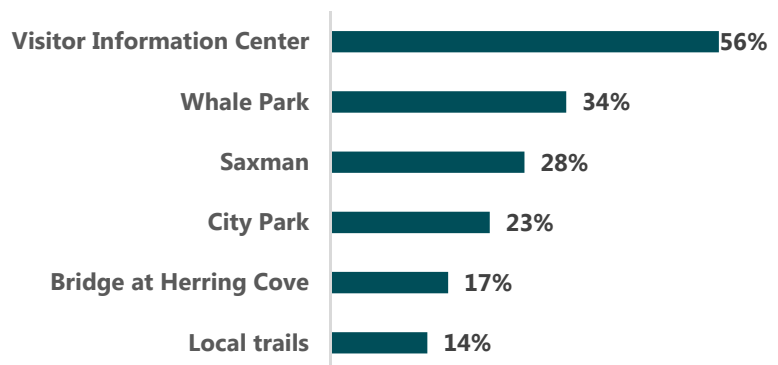
The Ketchikan Gateway Borough contracted with McDowell Group to conduct three cruise industry surveys in Ketchikan in summer 2016: a cruise passenger survey, a crew member survey, and a survey of local businesses serving cruise passengers. The purpose of the project was to gauge cruise industry usage and perceived importance of Borough-funded or Borough-operated facilities and services (described as Borough-impacted in our analysis). The passenger survey was conducted with 317 passengers on the cruise docks between June and September, following a sample plan reflective of the overall season in terms of cruise line and sailing direction. The crew survey was conducted with 103 crew members, likewise on the cruise docks, towards the end of the season to capture information on the whole season. The business survey was conducted both in-person and over the telephone with 50 businesses, selected to represent a range of attractions, retail shops, and transportation providers. Following are key results of the surveys.

Cruise Passenger Survey

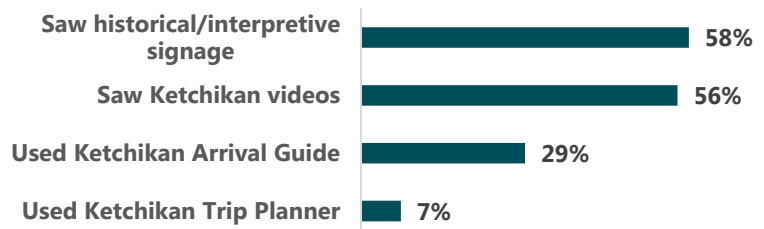
Cruise passengers were asked about their visitation to various Borough-impacted locations and their usage of Borough-impacted information sources.

- Over half of cruise passengers (56 percent) reported visiting one of the Visitor Information Centers.
- Whale Park and City Park were visited by 34 percent and 23 percent of passengers, respectively.
- Other locations passengers were asked about included Saxman (28 percent), Herring Cove bridge (17 percent), and local trails (14 percent).
- Over half of passengers (58 percent) said they saw historical/interpretive signage. Of these passengers, 78 percent reported that the signs enhanced their visit.
- Over half of cruise passengers (56 percent) reported watching Ketchikan videos before or during their trip. Most of these passengers (62 percent) reported watching the videos in their cruise ship cabin.
- Three out of ten passengers (29 percent) reported using the Ketchikan Arrival Guide, while 7 percent reported using the Ketchikan Trip Planner.
- Regarding transportation used to get around Ketchikan, 18 percent of passengers reported using the free downtown bus shuttle, and 10 percent said they used a public bus.

Cruise Passenger Visitation to Borough-Impacted Locations



Cruise Passenger Usage of Borough-Impacted Information Sources



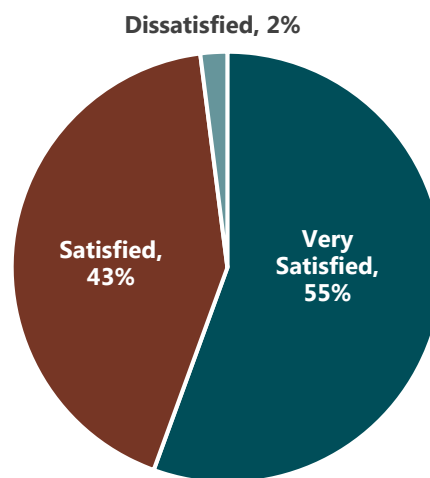
Cruise passengers were informed that their cruise package price included a \$2.50 fee to help fund local government services, including emergency medical services.

- When asked whether they agreed that 40 cents out of the fee should continue to be used to help pay for emergency services, 91 percent agreed, and zero disagreed. Nine percent said they didn't know.
- In a related question asked of passengers who had visited the bridge at Herring Cove, 81 percent considered it somewhat or very important that safety agents were available to ensure safe movement of traffic.

Cruise passengers were asked how satisfied they were with their overall Ketchikan visit.

- Overall satisfaction was high among passengers, with 55 percent very satisfied and 43 percent satisfied. Only 2 percent were dissatisfied, and zero were very dissatisfied.
- A related question asked southbound passengers how Ketchikan compared to other Alaska ports they had visited. Nearly two-thirds (62 percent) rated Ketchikan better or much better; 35 percent rated it about the same; and no one rated Ketchikan worse.

Cruise Passenger Satisfaction with Ketchikan Visit

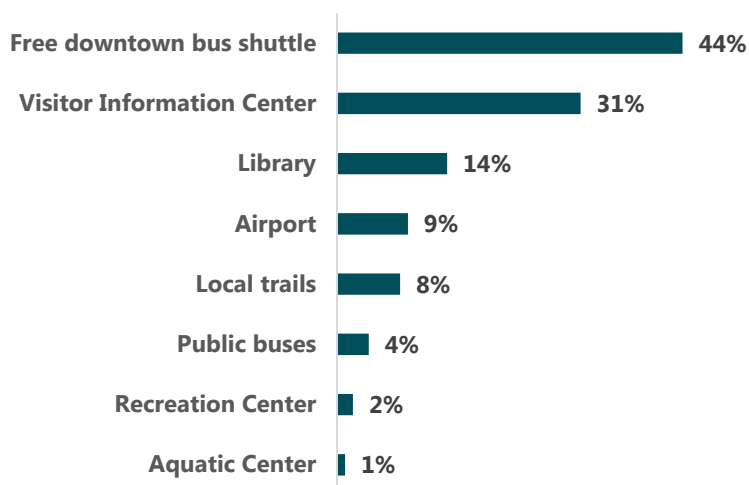


Crew Member Survey

Crew members were asked about their usage of various Borough-impacted facilities and services over the course of the entire season (not just on the day of the survey).

- Nearly half of crew members (44 percent) said they used the downtown bus shuttle at some point during the season, reporting an average of 3.6 uses.
- Nearly one-third (31 percent) said they used a Visitor Information Center. Other locations/facilities included the library (14 percent), airport (9 percent), local trails (8 percent), public buses (4 percent), the Recreation Center (2 percent), and the Aquatic Center (1 percent).
- Crew members reported taking shore leave in Ketchikan an average of 7.4 times.
- When asked how much money they spent in Ketchikan over the course of the season, crew members reported an average of \$430.
- Crew members were generally satisfied with their Ketchikan experiences, with 30 percent very satisfied and 66 percent satisfied. Only 2 percent were dissatisfied. Compared to other Alaska ports, Ketchikan was rated better as a place for crew members to visit by 78 percent, and worse by only 1 percent.

Crew Member Usage of Borough-Impacted Facilities and Services (Entire Season)

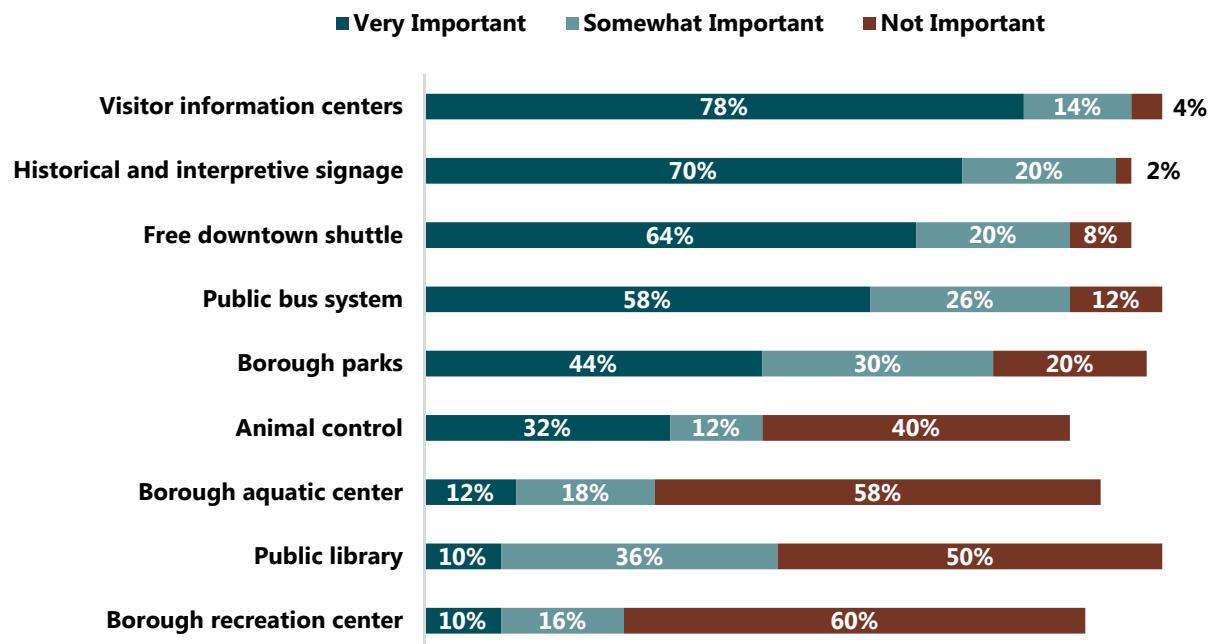


Cruise Business Interviews

Businesses were selected by the Borough and study team to be generally representative of businesses that serve Ketchikan’s cruise industry.

- Cruise businesses interviewed represented a range of business types: retail stores/galleries (28 percent), restaurant/food service (24 percent), ground tours/excursions (12 percent), attractions (12 percent), marine tours (8 percent), ground transportation (4 percent), charter fishing (4 percent), and flightseeing (2 percent).
- Businesses represented a wide range of sizes, from 1 to 200 employees. The average number of employees was 21. On average, 13 of these employees were year-round Ketchikan residents.
- Business owners attributed an average of 72 percent of their annual business volume to cruise passengers. Other categories included other visitors (average of 11 percent) and Ketchikan residents (17 percent).
- When asked about the importance of Borough-impacted services and facilities to cruise passengers, business owners rated the following as most important: visitor information centers, historical/interpretive signage, the free downtown shuttle, and the public bus system.
- The categories rated less important were the recreation center, public library, aquatic center, and animal control.

Importance of Borough-Impacted Services and Facilities to Cruise Passengers



Note: Rows do not add to 100 percent due to don't know and declined responses.

- A related question asked business owners whether they agreed that certain services should be paid for by a portion of the \$2.50 fee charged to cruise passengers. (The categories were slightly different from those in previous question.) A majority of business owners agreed that each service should be covered, with two exceptions: the aquatic center and recreation center.
- The categories with the highest degree of agreement were visitor information centers (96 percent agreed), downtown shuttle (86 percent), EMT services (82 percent), historical/interpretive signage (82 percent), public bus system (68 percent), and fire department (64 percent).

Introduction and Methodology

The Ketchikan Gateway Borough contracted with McDowell Group to conduct a series of cruise industry surveys in summer 2016. Three groups were surveyed: cruise ship passengers, cruise ship crew members, and local businesses serving the cruise industry. The purpose of the surveys was to gauge cruise industry-related usage and perceived importance of Borough facilities and services.

The cruise passenger survey included 317 randomly selected passengers intercepted on the cruise docks in the two-hour period before sailing. The sample schedule was designed to ensure representativeness by cruise line, sailing direction (northbound versus southbound), and month of travel. The sample size resulted in a maximum margin of error of ± 5.5 percent at the 95 percent confidence level.

A second survey was conducted, of 103 crew members. Like the cruise passengers, these crew members were randomly intercepted on the cruise docks, and represented a range of cruise lines. Most of the surveys were conducted toward the end of the summer in order to capture visitation and spending over the course of the season. The smaller sample size reflects the much smaller volume (and associated impact) of this population, compared to passengers. The maximum margin of error is ± 9.6 percent at the 95 percent confidence level.

A sample of 50 Ketchikan businesses that rely on cruise passengers (and/or crew) were targeted through intercept surveys and telephone interviews. These surveys were conducted in the July through September period. Care was taken to select a range of business types including attractions, retail shops, and transportation providers. Responses are not necessarily representative of the entire Ketchikan cruise-related business community.

Survey Sample Sizes

	Sample Size
Cruise Passenger Survey	317
Crew Member Survey	103
Cruise Business Survey	50
Total Surveys	470

All three survey instruments were designed in consultation with the Ketchikan Gateway Borough.

Results of the surveys are presented in the following chapters. "Other" and open-ended responses are provided in the Appendix.

Visitor Information Center Use

- More than half (56 percent) of respondents visited one of the Visitor Information Centers. (The survey did not differentiate between Ketchikan’s two Visitor Information Centers.)
- The visitor center was used most commonly for gathering information (66 percent) and restrooms (59 percent). Other usages included directions (30 percent), map (14 percent), tour booking (11 percent), and ATM (5 percent).

Did you visit the Visitor Information Center today?

	% of Total n=317
--	---------------------

Yes	56
No	44

What did you do at the center?

*(Base: Visited the Visitor Information Center)
Multiple responses allowed.*

n=177

Got information	66
Restrooms	59
Got directions	30
Got a map	14
Booked a tour	11
ATM	5
Other	3
Don't know	3

Ketchikan Arrival Guide and Trip Planner Use

- When asking respondents whether they had used the Ketchikan Arrival Guide, surveyors showed a copy of the Guide. Approximately one-third of respondents (29 percent) used the Ketchikan Arrival Guide.
- Of those who used it, 60 percent felt it was very helpful, and 25 percent felt it was somewhat helpful; no respondents said it was not helpful.
- Seven percent of respondents said they used the Ketchikan Trip Planner (again, a copy of the Planner was shown). The remainder did not use it (88 percent) or were not aware if they used it (6 percent).
- Of the 21 respondents who used the Trip Planner, 33 percent found it very helpful, and 48 percent found it somewhat helpful, and 19 percent did not know. No respondents said it was not helpful. (Numbers of respondents are referenced here, rather than percentages, due to the small sample size.)

Did you use the Ketchikan Arrival Guide/Ketchikan Trip Planner?

% of Total n=317	Arrival Guide	Trip Planner
Yes	29	7
No	69	88
Don't know	3	6
Was the Guide/Planner very helpful, somewhat helpful, or not helpful in planning your Ketchikan visit? <i>(Base: Used the Guide/Planner)</i>	n=91	n=21
Very helpful	60	33
Somewhat helpful	25	48
Not helpful	--	--
Don't know	14	19

Note: Columns may not add to 100% due to rounding.

Videos about Ketchikan

- Passengers were asked to recall if they had seen any videos about Ketchikan, where they watched the videos, and the themes of the videos. Over half of respondents (56 percent) had seen videos about Ketchikan.
- Nearly two-thirds (62 percent) of those who watched a video did so in their cabin onboard the ship. One-quarter of the respondents watched videos online, and another 19 percent saw a video during their visit to Ketchikan.
- In terms of video topics, the categories with the highest amount of views were Ketchikan history (46 percent), fishing (31 percent), local art and culture (31 percent), and bush pilots (28 percent). One-fifth of respondents (19 percent) weren't sure of the topic.

Do you remember watching any videos about Ketchikan, either before your trip, onboard the ship, or while you were here?

	% of Total n=317
Yes	56
No	42
Don't know	1
Where did you watch the videos?	
<i>(Base: Watched videos about Ketchikan)</i>	
<i>Multiple responses allowed.</i>	
	n=179
In your cabin	62
Online	25
In Ketchikan	19
Ship theater	7
Other	1
Don't know	1
Which videos do you remember watching?	
<i>(Base: Watched videos about Ketchikan)</i>	
<i>Multiple responses allowed.</i>	
	n=179
Ketchikan history	46
Fishing	31
Local art and culture	31
Bush pilots	28
Native Alaskan art	26
Timber harvesting	21
Don't know	19

Note: Columns may not add to 100% due to rounding.

Free Bus Shuttle and Public Bus Usage

- Nearly one-fifth of respondents (18 percent) said they used the free downtown bus shuttle. Shuttle usage was higher among those who used a Visitor Information Center (25 percent) and those who used the Trip Planner or Arrival Guide (36 percent).
- Of those that did *not* use the free bus shuttle, one-half were unaware of the shuttle service.

Did you use the free bus shuttle in the downtown area?

	% of Total n=317
Yes	18
No	81
Were you aware of the shuttle?	
<i>(Base: Did not use the free bus shuttle)</i>	
	n=258
Yes	37
No	50
Don't know	14

Note: Columns may not add to 100% due to rounding.

- Only 10 percent of passengers reported using the public bus system. Usage was higher among Planner/Guide users at 22 percent.

Did you travel on any other public buses today?

	% of Total n=317
Yes	10
No	88
Don't know	2

Ease of Finding Way Around Ketchikan

- Virtually all respondents (96 percent) felt that getting around Ketchikan was easy or very easy, including 41 percent who felt it was very easy and 55 percent who said it was easy.
- Only 5 percent said it was difficult (4 percent) or very difficult (1 percent). These respondents were asked what they had a hard time finding. The only locations noted were the City Park and the fish ladder (one mention each). Several respondents noted a lack of accessibility for the disabled, and two respondents mentioned construction.

Was finding your way around Ketchikan very easy, easy, difficult, or very difficult?

	% of Total n=317
Very easy	41
Easy	55
Difficult	4
Very Difficult	1

Note: Columns may not add to 100% due to rounding.

Borough Facilities Usage

- When asked about usage of several Borough facilities, very few passengers reported usage: 5 percent used the library, 1 percent used the recreation center, and no passengers used the pool.

Did you visit any of the following facilities today?

Multiple response allowed

	% of Total n=317
Library	5
Recreation Center	1
Pool	--
None of the above	94
Don't know	1

Park Visits

- One-third of the visitors (34 percent) remembered visiting Whale Park, while 23 percent remembered visiting City Park.
- Of those who visited the parks, 79 percent felt they were well maintained.

Did you visit Whale Park/City Park today?

% of Total n=317	Whale Park	City Park
Yes	34	23
No	62	75
Don't know	3	2
Was the park well maintained, adequate, or poorly maintained? <i>(Base: Visited park)</i>	n=109	n=73
Well maintained	79	79
Adequate	16	16
Poorly maintained	--	--
Don't know	6	4

Note: Columns may not add to 100% due to rounding.

Local Trail Use and Locator Beacons

- One in seven respondents (14 percent) had hiked or walked on local trails.
- Of those who used the trails, over half (51 percent) had heard about the SPOT emergency locator beacons.
- Among the 22 respondents who had heard of the program, over half (13 respondents) said they had learned about it at a Visitor Center. Three respondents learned about it online, three read about it in a Guide, and two heard about it from a local resident. There was one mention each of onboard staff and other passengers. (Numbers of respondents are referenced here, rather than percentages, due to the small sample size.)
- Among the same 22 respondents who had heard of the program, five said someone in their travel party carried a beacon on their hike/walk.
- Nearly all respondents who had heard of the program (20 out of 22) considered it very important that the beacons were available to cruise passengers on hikes/walks.

Did you hike or walk on local trails today?

	% of Total n=317
Yes	14
No	85
Don't know	1
The Ketchikan Volunteer Rescue Squad provides free SPOT emergency locator beacons to passengers who hike or walk on local trails. Have you heard of this program?	
<i>(Base: Hiked or walked on local trails)</i>	
	n=43
Yes	51
No	49

Public Restrooms

- The vast majority of respondents (79 percent) said there were enough public restrooms available during their visit, while 11 percent said there weren't enough.
- Those who said there weren't enough were asked where additional restrooms were needed. The most common suggestions were downtown (10 mentions), followed by Creek Street (six mentions), and dock/berth (five mentions).

Were there enough public restrooms available during your Ketchikan visit?

	% of Total n=317
Yes	79
No	11
Don't know	10

Historical and Cultural Interest

Participants were asked what their travel topics of interest were among four key categories: indigenous cultures, history of the community, historic buildings and structures, and historical figures.

- Passengers expressed high levels of interest in all four subjects, with between 83 and 93 percent at least somewhat interested in each category.
- The highest level of interest was in the history of the community, with 58 percent very interested, followed by indigenous cultures (52 percent), historic buildings and structures (48 percent), and historical structures (38 percent).
- When asked for the *most* interesting topic, passengers most commonly chose history of the community (39 percent), followed by indigenous cultures (33 percent), historic buildings and structures (16 percent), and historic figures (6 percent).

When you travel, are you very interested, somewhat interested, or not interested in learning about the following topics?

% of Total n=317	Very Interested	Somewhat Interested	Not Interested	Don't know/ Refused
History of the community	58	35	4	3
Indigenous cultures	52	38	8	3
Historic buildings and structures	48	40	10	2
Historical figures	38	45	13	4

Note: Rows may not add to 100% due to rounding.

Of these four topics, what are you most interested in when you travel?

	% of Total n=317
History of the community	39
Indigenous cultures	33
Historic buildings and structures	16
Historic figures	6
Don't know	5

Note: Columns may not add to 100% due to rounding.

Interpretive Signage

- Over half of respondents (58 percent) remembered seeing historical or interpretive signage around Ketchikan.
- Among those who remembered seeing signage, over three-quarters (78 percent) reported it enhanced their visit.

Do you remember seeing any historical or interpretive signage during your visit today?

	% of Total n=317
Yes	58
No	39
Don't know	3
Did the signs enhance your visit?	
<i>(Base: Saw historical or interpretive signage)</i>	
	n=184
Yes	78
No	8
Don't know	15

Note: Columns may not add to 100% due to rounding.

Saxman Totem Park Visit

- Over one-quarter (28 percent) of cruise passengers visited Saxman Totem Park.
- When Saxman visitors were asked about their transportation to Saxman, half (51 percent) said they were on a bus tour, 12 percent took a taxi, 11 percent used the public bus system, 10 percent went on foot or on a bike, and 7 percent went with local family or friends in Ketchikan.

Did you visit the Saxman Totem Park today?

	% of Total n=317
Yes	28
No	72
What transportation did you use to get to Saxman?	
<i>(Base: Visited Saxman Totem Park)</i>	
	n=90
Bus tour	51
Taxi	12
Public bus	11
On foot/bicycle	10
Local friend/family	7
Rental vehicle	1
Don't know	7
Other	1

Herring Cove Bridge Visitation

- Nearly one-fifth (17 percent) of passengers visited the Herring Cove bridge.
- Of those that visited the Herring Cove bridge, 58 percent felt the safety agents were important to them, 23 percent felt they were somewhat important, and 9 percent felt they were not important.

Did you visit the bridge at Herring Cove today?

	% of Total n=317
Yes	17
No	83
Don't know	1
The Ketchikan Gateway Borough provides safety agents at Herring Cove to ensure the safety of visitors. How important was it to you that these safety agents were available to ensure your safety?	
<i>(Base: Visited the bridge at Herring Cove)</i>	
	n=53
Very important	58
Somewhat important	23
Not important	9
Don't know	9

Note: Columns may not add to 100% due to rounding.

Funding Emergency Services with Cruise Passenger Fee

Cruise passengers were read the following statement before the next question:

Now I'd like to ask a question about fees for community services for visitors to Ketchikan. Your cruise package included a \$2.50 fee to help fund local government services. This includes emergency services such as emergency medical care, search and rescue, and fire department.

- When asked whether they agreed that 40 cents should continue to be used to help pay for these emergency services, 91 percent of respondents agreed or strongly agreed, including 55 percent that strongly agreed. No respondents disagreed.

Please tell me if you strongly agree, agree, disagree, or strongly disagree that about 40 cents out of the \$2.50 fee should continue to be used to help pay for these emergency services.

	% of Total n=317
Strongly agree	55
Agree	36
Disagree	--
Strongly disagree	--
Don't know	9

Satisfaction with Ketchikan

- Most visitors to Ketchikan (98 percent) were satisfied with their visit, including 55 percent who were very satisfied.
- Only 2 percent were dissatisfied with their experience, representing seven respondents. In a follow-up question asking for their reason for dissatisfaction, the two most common responses were bad weather (three mentions) and not enough time in-port (three mentions). All other responses were mentioned once: not enough to do, hard to find info on free shuttle, and offloaded at dock but had to boat back.

Were you very satisfied, satisfied, dissatisfied, or very dissatisfied with your overall Ketchikan visit?

	% of Total n=317
Very satisfied	55
Satisfied	43
Dissatisfied	2
Very dissatisfied	--

- Almost two-thirds (62 percent) of the participants traveling southbound said Ketchikan was better or much better than other Alaska ports they had visited. (Visitors traveling northbound were not asked this question, as Ketchikan was usually their first Alaska port.)
- All other participants (35 percent) said Ketchikan was about the same to visit as other ports. No respondents said that it was worse or much worse than other ports.

Compared to other Alaska ports you visited, how would you rate Ketchikan as a place to visit?

(Base: Southbound only)

	% of Base n=203
Much better	31
Better	31
About the same	35
Worse	-
Much worse	-
Don't know	3

Sample Characteristics

- Respondents represented all major cruise lines that visit Ketchikan. Passengers from small cruise lines (such as Un-Cruise and Alaskan Dream) were excluded from the sample, as vessels with capacities of less than 250 passengers are not subject to any cruise-related taxes.
- In terms of month, surveys were distributed from June through September. (May was excluded due to the timing of the project.)
- Over half of passengers (57 percent) were sailing on southbound vessels.
- Respondent gender was evenly split between male (49 percent) and female (51 percent).

Sample Characteristics

	% of Total n=317
Cruise Lines	
Princess Cruises	29
Holland America Line	23
Norwegian Cruise Line	18
Royal Caribbean International	9
Carnival Cruise Line	7
Celebrity Cruises	7
Disney Cruise Line	4
Regent Seven Seas Cruises	3
Month of Survey	
June	26
July	25
August	38
September	12
Sailing Direction	
Northbound	43
Southbound	57
Gender	
Male	49
Female	51

Note: Columns may not add to 100% due to rounding.

Visitor Information Center Use

- Nearly one-third (31 percent) of crew members visited the Visitor Information Center sometime over the course of the season.
- Of those that visited the Center, nearly one-third (31 percent) got information or used restrooms, followed by 28 percent picked up a map, 16 percent got directions, 13 percent used the ATM.

This season, have you visited Ketchikan's Visitor Information Center?

	% of Total n=103
Yes	31
No	68
Don't know	1
What did you do at the center?	
<i>(Base: Visited Center)</i>	
n=32	
<i>Multiple responses allowed.</i>	
Got information	31
Restrooms	31
Got a map	28
Got directions	16
ATM	13
Other	6
Booked a tour	3
Don't know	13

Getting Around Ketchikan

- Nearly all (98 percent) of respondents felt that getting around Ketchikan was easy, including 35 percent who said it was very easy. Only 2 percent said it was difficult.

Is finding your way around Ketchikan very easy, easy, difficult, or very difficult?

	% of Total n=103
Very easy	35
Easy	63
Difficult	2
Very Difficult	--

- Nearly one-half (44 percent) of crew members reported that they used the free bus shuttle at some point in the season.
- Of those that used the shuttle, the average number of uses was 3.6. Considering respondents reported an average of seven shore visits over the season, this implies that crew members took the shuttle, on average, on half of their Ketchikan visits.
- Of those that did not use the shuttle, one-third (33 percent) said they were aware of it.

At any time this season, did you use Ketchikan's free bus shuttle in the downtown area?

	% of Total n=103
Yes	44
No	53
Don't know	3
About how many times did you use the shuttle this season?	
<i>(Base: Used free bus shuttle)</i>	
	n=44
1 time	34
2 times	23
3-9 times	25
10+ times	9
Average # of times	3.6 times
Don't know	9
Were you aware of the shuttle?	
<i>(Base: Did not use free bus shuttle)</i>	
	n=55
Yes	33
No	60
Don't know	7

- Just 4 percent of crew members said they had used other public buses in Ketchikan over the course of the season.

Did you travel on any other Ketchikan public buses any time this season?

	% of Total n=102
Yes	4
No	96

Borough Facilities Use

- Most crew members didn't use the library, recreation center, or the pool (83 percent). Of the three facilities, the library was the most likely to be used at 14 percent. Just 2 percent reported using the Recreation Center, and 1 percent reported using the pool.
- Among the 14 respondents who reported using the library, the average number of library visits over the course of the season was 2.1.

Did you visit the following Ketchikan locations anytime this season?

	% of Total n=102
Library	14
Recreation Center	2
Pool	1
None of the above	83

Ketchikan Airport

- Nine percent of crew members used the airport at least once over the course of the season.
- Of the nine respondents that reported airport use, four said they flew to Ketchikan to board their ship for the first time that season.

Did you fly in or out of the Ketchikan Airport anytime this season?

	% of Total n=102
Yes	9
No	91

Local Trail Use

- A small fraction of crew members (8 percent) reported using parks or trails in Ketchikan over the course of the season.

Did you use any parks or trails in Ketchikan this season?

	% of Total n=102
Yes	8
No	91
Don't know	1

Public Restrooms

- Over one-half (53 percent) of crew members said there were enough public restrooms available during their visits, while 23 percent said there were not enough, and 25 percent said they didn't know.

Were there enough public restrooms available during your Ketchikan visits?

	% of Total n=102
Yes	53
No	23
Don't know	25

Note: Columns may not add to 100% due to rounding.

Crew Member Spending

- Crew members were asked a series of questions about their spending in Ketchikan. First they were asked about how much they spent, total, on their last shore leave in Ketchikan; if they were on their first shore leave, they were asked how much they expected to spend that day. The average total spent (among the 77 crew members who responded to the question) was \$111.
- Respondents were then asked to estimate their spending by category, on their previous Ketchikan shore leave. By far the category with the highest spending was groceries/pharmacies/Wal-Mart, at \$76 per person. Other categories included restaurants (\$22 per person), gifts/souvenirs (\$16 per person), clothing (\$3 per person), and other (\$6 per person). Totaling the categories up adds to \$120, just slightly over the total average of \$111. The averages do not match exactly due to “don’t know” responses for some categories.
- A follow-up question asked respondents to estimate their total spending in Ketchikan for the entire season. The average reported was \$430.

On your last shore leave in Ketchikan, can you remember about how much money you spent while in town?

	Average \$ Per Person
Groceries/pharmacies/Wal-Mart (n=76)	\$76
Restaurants (n=68)	\$22
Gifts/souvenirs (n=70)	\$16
Clothing (n=68)	\$3
Other (n=67)	\$6
Total Per Person (n=77)	\$111
Total Per Season (n=74)	\$430

Note: If this was their first time in Ketchikan, they were asked to estimate how much they expect to spend in town that day.

Ketchikan Satisfaction

- Nearly all crew members (96 percent) were satisfied with their overall Ketchikan experiences, including 30 percent who were very satisfied and 66 percent who were satisfied. Just 2 percent were dissatisfied.

In general, have you been very satisfied, satisfied, dissatisfied, or very dissatisfied with your overall experiences in Ketchikan?

	% of Total n=102
Very satisfied	30
Satisfied	66
Dissatisfied	2
Very dissatisfied	-
Don't know	2

- Compared to other Alaska ports they have visited, over three-quarters of crew members (78 percent) rated Ketchikan as better for crew members, including 36 percent who said it was much better. Seventeen percent felt it was about the same as other Alaska ports, and just 1 percent said it was worse.

Compared to other Alaska ports you have visited, how would you rate Ketchikan as a place for crew members to visit?

	% of Total n=102
Much better	36
Better	42
About the same	17
Worse	--
Much worse	1
Don't know	4

- Crew members were asked how the community could improve crew members' experience. The most common suggestions were more free shuttles, free wifi, more information on free shuttle/schedules, and more information on the community. A full list of suggestions is provided in the Appendix.

Ketchikan Shore Leave

- Crew members were asked how many times they had gotten off their ship (“shore leave”) while docked at Ketchikan this season, including their current visit. The average number of visits was 7.4.
- Of crew members surveyed, 38 percent had taken shore leave in Ketchikan 1-4 times, one-fifth (20 percent) had taken shore leave 5-9 times, one-quarter (25 percent) had taken shore leave 10-14 times, and 11 percent had taken shore leave over 15 times.

How many times this season did you take shore leave in Ketchikan, including this visit?

	% of Total n=103
1-4	38
5-9	20
10-14	25
15+	11
Average number of visits	7.4
Don't know	6

- This question was asked, in part, to understand the number of crew members who sail into Alaska when the season starts in May versus those who fly into Alaska and join the ship mid-season. Just over half of crew members (53 percent) arrived into Alaska in May, while similar portions arrived in June (19 percent), July (16 percent), and August (12 percent).

What month did you arrive into Alaska for the first time this season?

	% of Total n=103
May	53
June	19
July	16
August	12

Cruise Line

- The cruise lines represented by respondents generally reflected those of surveyed passengers, with Holland America and Princess representing the bulk of crew members.

Crew Member Cruise Line

	% of Total n=103
Holland America Cruise Line	41
Princess Cruise Line	25
Celebrity Cruises	14
Norwegian Cruise Lines	11
Royal Caribbean International	5
Regent Seven Seas Cruises	3
Silversea	2

Note: Columns may not add to 100% due to rounding.

Cruise Business Interviews

Business Type

- A wide range of businesses serving the cruise industry were interviewed for the study. Businesses were selected based on input from the Borough and the Ketchikan Visitors Bureau. The most common business type represented was retail/gallery (28 percent), followed by restaurants (24 percent) and tours/excursions (12 percent).

Business Type	
	% of Total n=50
Retail/gallery	28
Restaurant/food service	24
Ground tours/excursions provider	12
Attraction	10
Marine tours	8
Ground transportation	4
Charter fishing	4
Flightseeing	2
Other	8

Cruise-Related Business

- Business owners were asked for the percentage of their business volume attributable to cruise passengers and crew, as well as other markets. Businesses reported an average of 72 percent cruise passenger/crew attribution. They reported an average of 17 percent for Ketchikan residents and 11 percent for other visitors to Ketchikan.
- Seventeen of the 47 responding businesses (37 percent) reported 90 percent or more cruise industry attribution.

Can you estimate what percentage of your annual volume of business is attributable to...

	Average % n=47
Cruise passengers and crew	72
Ketchikan residents	17
Other visitors to Ketchikan	11
Other	1

Note: Columns may not add to 100% due to rounding.

Number of Employees

- Business owners reported a wide range of sizes in terms of local employment, from one to 200 employees. The average number of employees across all businesses was 21.
- On average, just over half of employees among businesses surveyed were year-round Ketchikan residents (13 out of 21).
- Nearly half (44 percent) of businesses employed only year-round Ketchikan residents.

**How many people do you employ in Ketchikan during the summer?
About how many of your employees are year-round Ketchikan residents?**

% of Total n=50	Number of Employees (%)	Number Ketchikan Residents (%)
1 to 5 employees	20	37
6 to 10 employees	33	31
11 to 20 employees	20	16
More than 20 employees	27	16
Average	21 employees	13 employees

Importance of Borough-Supported Services

- Business owners were asked about the importance of Borough-supported services to meeting the needs of cruise passengers. Business owners rated visitor information centers as the most important, at 78 percent very important, followed by historical and interpretive signage (70 percent), downtown shuttle (64 percent), and the public bus system (58 percent)
- Services seen as least important were the recreation center (60 percent not important), aquatic center (58 percent), public library (50 percent), and Animal Control (40 percent).

Please tell me if you think the following Borough-supported services are very important, somewhat important, or not important to meeting the needs of cruise passengers.

% of Total n=50	Very important	Somewhat important	Not important	Don't know/ Refused
Visitor information centers	78	14	4	4
Historical and interpretive signage	70	20	2	8
Free downtown shuttle	64	20	8	8
Public bus system	58	26	12	4
Borough parks	44	30	20	6
Animal Control	32	12	40	16
Borough aquatic center	12	18	58	12
Public library	10	36	50	4
Borough recreation center	10	16	60	14

Note: Rows may not add to 100% due to rounding.

- Business owners were asked how important certain Borough-supported services were for their employees. Four out of the five services were generally considered important; the only service rated as not important was the downtown shuttle.
- The service seen as most important was the recreation center, at 54 percent very important, followed by the public bus (52 percent), aquatic center (44 percent), public library (40 percent), and shuttle (14 percent).

Are the following Borough-supported services very important, somewhat important, or not important to meeting the needs of your employees?

% of Total n=50	Very important	Somewhat important	Not important	Don't know/ Refused
Borough recreation center	54	20	22	4
Public bus system	52	12	36	0
Borough aquatic center	44	26	26	4
Public library	40	28	28	4
Free downtown shuttle	14	10	74	2

Note: Rows may not add to 100% due to rounding.

Cruise Passenger Fee Usage

Before being asked the next question, business owners were read the following:

The price of a cruise package includes a \$2.50 fee that is paid to the Ketchikan Gateway Borough to help fund municipal government services used by cruise passengers.

- A majority of business owners agreed or strongly agreed that all services should be funded by the cruise passenger fee, with two exceptions: the recreation center and the aquatic center.
- Agreement was strongest for the visitor information centers (54 percent strongly agreed), EMT services (50 percent), downtown shuttle (48 percent), and historical/interpretive signage (44 percent).
- Disagreement was highest for the recreation center (64 percent disagreed) and aquatic center (62 percent).

Please tell me if you strongly agree, agree, disagree, or strongly disagree that a portion of the \$2.50 fee should be used to help pay for the cost of the following services available to cruise passengers.

% of Total n=50	Strongly agree	Agree	Neither/ Neutral	Disagree	Strongly disagree	Don't know/ Refused
Visitor information centers	54	42	2	2	0	0
EMT services	50	32	2	12	2	2
Free downtown shuttle	48	38	4	8	0	2
Historical and interpretive signage	44	38	8	8	0	2
Medevac services	32	26	8	30	2	2
Fire department	30	34	10	22	2	2
Public bus system	30	38	12	14	4	2
Herring Cove bridge safety	24	36	8	18	4	10
Wilderness search and rescue	20	32	12	30	2	4
Borough recreation center	10	14	12	58	6	0
Borough aquatic center	8	18	12	52	10	0

Note: Rows may not add to 100% due to rounding.

Challenges for Employees

Business owners were asked if finding housing, transportation around the community, and the cost of living were challenging for their employees during the summer season.

- Cost of living was the most challenging issue, with 40 of business owners saying this is very challenging, and another 30 percent saying it is somewhat challenging.
- Housing was very challenging for nearly half (44 percent) of businesses' employees, and somewhat challenging for another 10 percent.
- Transportation around the community was rated least challenging. Three-quarters (76 percent) said this was not a challenge for their employees.
- Businesses with primarily Ketchikan residents felt all categories were less challenging, in comparison with those who employed more seasonal employees.

How challenging are each of the following for your employees in the summer season?

% of Total n=50	Very challenging	Somewhat challenging	Not challenging	Don't know/ Refused
Cost of living	40	30	30	0
Finding housing	44	10	46	0
Transportation around the community	10	14	76	0

Suggestions

Business owners were asked for suggestions on additional uses for the cruise passenger fee. The most common suggestions were public restrooms, road and sidewalk improvement, and crossing guards. Additional suggestions included beautification, rain shelters, and information services.

A follow-up question asked about complaints the business owners regularly hear from passengers, that the Borough could possibly address. The most common response was better signage, not enough time in port, and complaints about jewelry stores.

A full list of responses to both questions is provided in the Appendix.

This section presents additional comments provided by cruise passengers, crew members, and business owners following each "other" response to open-ended question.

Cruise Passenger Others and Open-Ended Responses

What did you do at the Visitor Information Center? – Others

- Brochures
- Mailbox
- Meeting friends
- Rain Shelter (x3)

What did you have a hard time finding in Ketchikan?

- City Park
- Construction made it difficult to get around (x2)
- Fish ladder
- Handicap access to stores (x3)
- Wifi

Where did you watch videos about Ketchikan? – Others

- Ship lounge
- Meeting on ship
- Museum

Can you tell us where additional public restrooms are needed?

- Ball park area
- Better signage of where restrooms are located
- Centennial Parking Lot
- City Park (x2)
- Creek St. (x6)
- Deer Mountain Trail Head (x2)
- Dock/Berth (x5)
- Downtown (x8)
- Every where
- Hunt lake
- Museum
- South downtown end (x2)
- Visitor Information Center (better cleaning needed too)

- Whale Park

What transportation did you use to get to Saxman? – Others

- Boat tour

Why were you dissatisfied with Ketchikan?

- Bad weather (x3)
- Not enough time in-port (x3)
- Not enough to do
- Hard to find info on free shuttle
- Offloading at dock but had to boat back

What did you have a hard time finding?

- City Park
- Construction
- Construction makes it hard to get to stores with walker
- Fish ladder
- Handicap access to stores
- Handicapped
- No wheel chair ramps in many stores
- WIFI

Crew Member Others and Open-Ended Responses

What did you do at the Visitor Information Center? – Others

- Help a guest

What did you have a hard time finding? – Others

- No signage
- Stores

Can you remember the names of the parks or trails you used? – Others

- Fish Ladder
- Married Man Trail (x2)
- City Park
- Rainbird Trail
- Whale Park

Can you tell us where additional public restrooms are needed? – Others

- In shops
- Near Chinese restaurant
- Near Ketchikan Creek
- Wal-Mart
- Wal-Mart Shuttle

Do you have suggestions on how the community could improve crew members' experience in Ketchikan? – Additional Comments

- A crew center to use the phone, email, etc.
- Bike rentals
- Free wifi (x4)
- Inform us about the free shuttle (x4)
- More activities/sightseeing opportunities
- More bars
- More community info (x3)
- More crew discounts on tours
- More free shuttles (x7)
- More information about buses/schedules (x4)
- More shopping, low prices
- More time in port (x2)
- More Wal-Mart shuttles (x3)
- More Wal-Mart time (x2)
- No seafarers house
- No tramway like Juneau
- Promote attractions. We don't know what to do in Ketchikan.
- Wal-Mart should be closer
- Want a Costco

Cruise Business Open-Ended Responses

Do you have suggestions for other uses for the cruise passenger fee?

- Beautification
- Better signage, community beautification, community cleanup, better sidewalks, covered areas for passengers waiting to board ships
- Clean parks
- Crossing Guards (x3)
- Downtown post office
- Emergency services are a priority
- Facilitate web-centric non-partisan information
- Free business flyers, TV ads for Ketchikan nationally, lower sales tax

- Herring Cove should be handicap accessible
- Herring Cove staircase
- Lost and Found
- More information is needed like the great visitor center we have
- More ShoreEx shelters
- Platform for Ketchikan arch
- Public restrooms (x8)
- Road and sidewalk improvement (x5)
- Totem pole maintenance, bike trail maintenance

Are there any complaints you hear regularly from cruise passengers that you think the Borough could help address?

- Benches
- Better signage (x6)
- Free shuttle should also go to Wal-Mart
- Herring cove safety
- Jewelry hawking (x2)
- Jewelry hawking, wayfinding
- Jewelry stores aren't paying tax on cash purchases
- Lack of covered areas in docks
- Length of time in port (x3)
- Local business promotions
- Lost and found (x2)
- More information centers
- More plants
- More Wi-Fi hotspots
- Pharmacy
- Post Office downtown (x2)
- Public restrooms (x10)
- Rain shelters
- Too many tourists
- Too much walking

Do you have suggestions on how the Borough could enhance visitors' experience in Ketchikan?

- More local tours, local Ketchikan history emphasis
- Tourist Guide
- Zero sales tax for visitors