ALASKA

Visitor Statistics Program

Alaska Visitor Volume and Profile

Fall/Winter 2006-07

Conducted by

McDowell GROUP

In association with:

DataPath Sysems

Davis, Hibbitts & Midghall, Inc.

State of Alaska

Department of Commerce,

Community and Economic Development

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November 2007

Table of Contents

Section I:
Executive Summary

Introduction

AVSP Overview

The Alaska Visitor Statistics Program is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community and Economic Development. The study provides the state government and the tourism industry essential information on one of Alaska's major economic engines: out-of-state visitors. AVSP V (the fifth generation of the program) consists of two main components:

Visitor Volume: The Visitor Volume estimate is a count of the number of out-of-state visitors exiting Alaska, by transportation mode, during the study period.

Visitor Survey: The Visitor Survey is administered to a sample of out-of-state visitors departing Alaska at all major exit points. The survey includes questions on trip purpose, transportation modes used, length of stay, destinations, lodging, activities, expenditures, satisfaction, trip planning, and demographics.

The study is undertaken in two stages: Summer 2006 (May 1-September 30) and Fall/Winter 2006-2007 (October 1-April 30). This report addresses the Fall/Winter period.

Project Team

The AVSP V project team was lead by the McDowell Group, Inc., a research and consulting firm with offices in Juneau, Anchorage, and Kodiak. They were assisted by Davis, Hibbitts & Midghall (DHM) based in Portland, Oregon and DataPath Systems of Whitehorse, Yukon Territory.

Changes for AVSP V

While AVSP V collects much of the same information as in previous generations of the study, several significant methodological changes were incorporated: an exit (rather than entry) methodology, the consolidation of three survey instruments into one instrument, and the use of online surveying. Details on these changes can be found in the Introduction and Methodology chapters.

Methodology

The Visitor Volume estimate was based on visitor/resident tallies of 28,611 travelers exiting Alaska at major exit points. The resulting ratios were applied, by month and by location, to traffic data (for example, highway border crossings, ferry disembarkations, airport enplanements) to arrive at the visitor volume estimates.

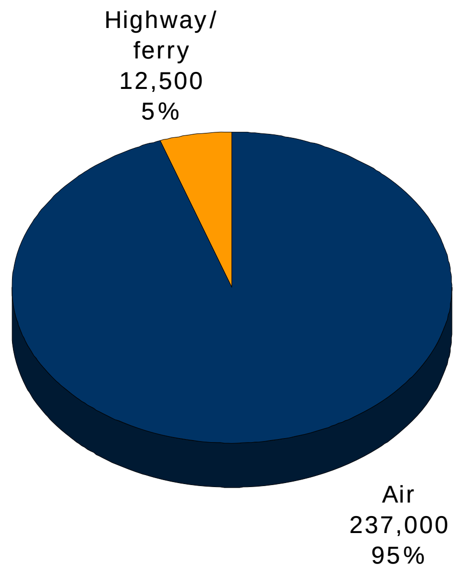
The Visitor Survey included 1,055 intercept surveys (in-person interviews) and 223 surveys completed online, for a total of 1,278 surveys. Visitors were surveyed at all major exit points: airports, highways, and ferries. To obtain the online sample, "invitation cards" were distributed to visitors during intercept sample periods at the Anchorage and Fairbanks airports, inviting them to participate in the web-based survey. The response rate for the intercept survey was 87 percent; for the online survey, 11 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

Please see the Methodology chapter for further details.

Visitor Volume, Fall/Winter 2006-2007

An estimated 249,500 out-of-state visitors came to Alaska between October 2006 and April 2007. Of this number, 237,000 were air visitors (entered and exited the state by air), and 12,500 were highway/ferry visitors (entered or exited the state by highway or ferry). Of the total market, 105,500 were traveling to visit friends or relatives; just under 100,000 were traveling for business only; and 17,000 traveled for business and pleasure. The vacation/pleasure market accounted for approximately 30,000 visitors during fall/winter – this compares to 1.3 million who traveled to Alaska in summer 2006.

Alaska Visitor Volume, Fall/Winter 2006-07
By Transportation Market

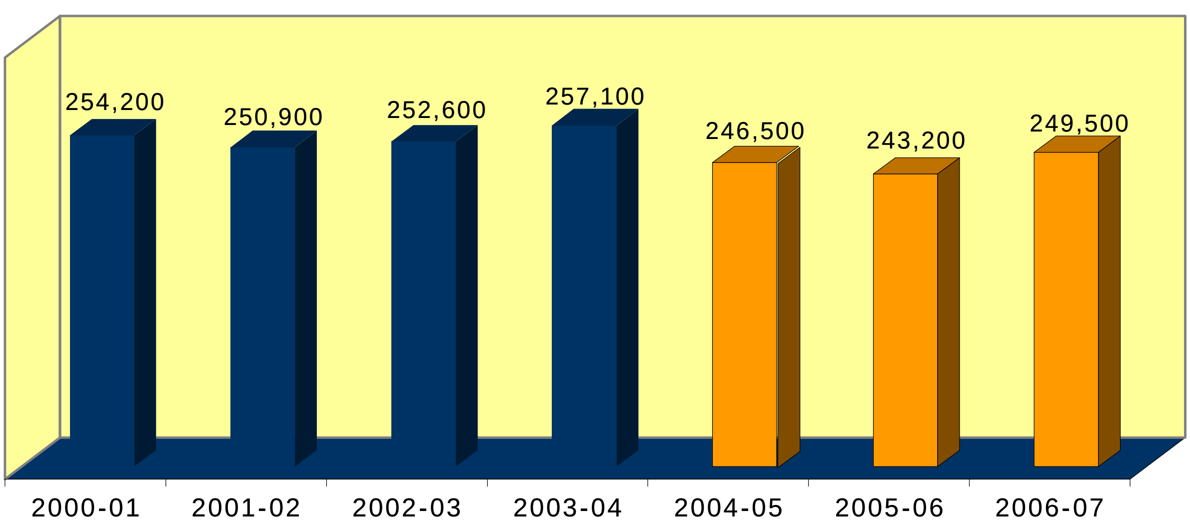


Fall/Winter Visitor Volume: 249,500

Visitor Volume Trends

The chart below shows trends in estimated visitor volume, measured by mode of entry (2000-2004) and exit (2004-2007). Fall/winter visitor volume appears to be holding steady at around 250,000 visitors. The apparent drop in visitation between 2003-04 and 2004-05 (by 4.1 percent) could be a reflection of updated data sources and ratios, rather than an actual decrease. Other traffic shifts are in the 1 to 3 percent range.

Fall/Winter Visitor Volume, 2000-2007



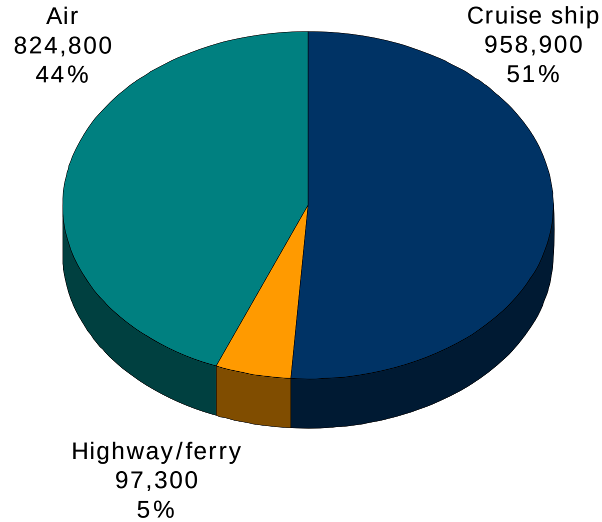
Sources: 2000-2004 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.);
2004-2007 data based on 2006-07 visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).

Full-Year Visitor Volume

Combining results of the Summer 2006 and Fall/Winter 2006-07 AVSP study periods, the volume of out-of-state visitors to Alaska for the 12-month period was 1,881,000. The summer market (1,631,500) represented 87 percent of the annual volume; the winter market (249,500) represented 13 percent.

Of the total 12-month volume, 958,900 (51 percent) were cruise ship passengers, 824,800 (44 percent) were air visitors, and 97,300 (5 percent) were highway/ferry visitors.

Alaska Visitor Volume, May 2006-April 2007
By Transportation Market

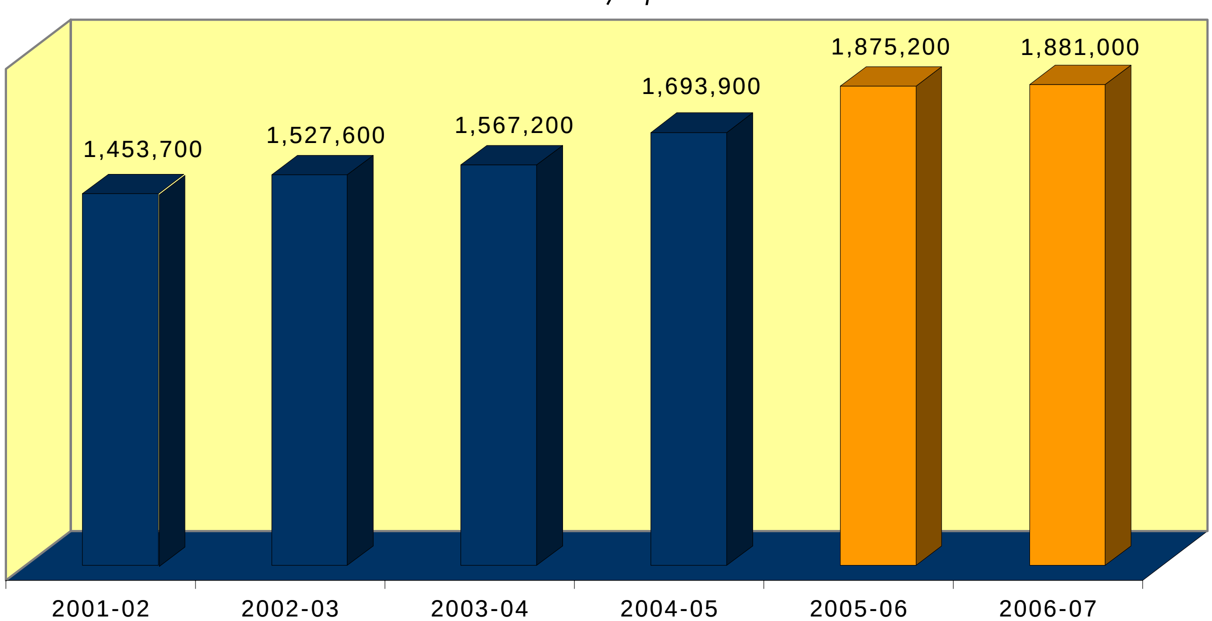


Total Annual Visitor Volume: 1,881,000

Full-Year Visitor Volume Trends

The chart below shows trends in estimated *annual* visitor volume, based on combined results from the summer and fall/winter periods. Visitation increased gradually between the 2001-02 and 2006-07 periods, from 1.5 million to 1.9 million. Although there appears to be a more significant increase between 2004-05 and 2005-06, the growth is partly attributable to updated data sources and methodology. The data between 2001-02 and 2004-05 is based on visitor/resident ratios collected in 2000-01, while 2005-06 and 2006-07 data was based on ratios collected in 2006-07. For further information on the differences between the two sets of data, please refer to the Summer AVSP report.

Full-Year Visitor Volume, 2001-2007
Based on May-April Period



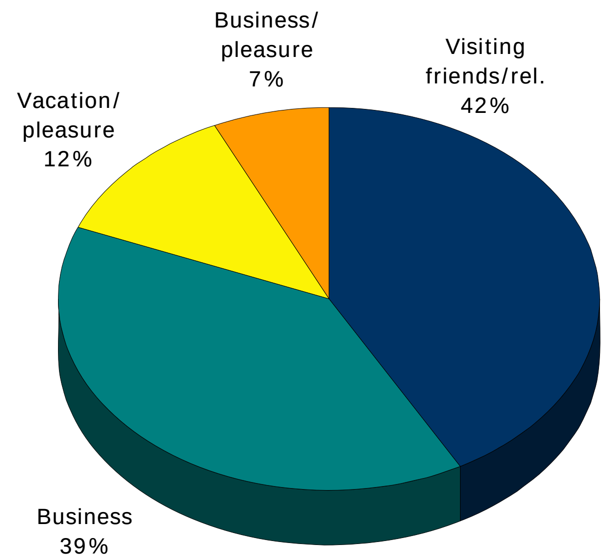
Sources: 2001-02 to 2004-05 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.); 2005-06 to 2006-07 data based on visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).

This section summarizes the results of the visitor survey, conducted with out-of-state visitors as they departed Alaska between October 2006 and April 2007. A total of 1,055 visitors were surveyed at major exit points: airports, highways, and ferries. An additional 223 visitors completed online surveys once they returned home, for a total sample of 1,278 visitors. All data was weighted to reflect actual traffic volumes by mode of transportation.

Trip Purpose

The most common trip purpose for fall/winter visitors was visiting friends or relatives (VFR), accounting for 42 percent of visitors. Close behind was business at 39 percent, with another 7 percent traveling for business *and* pleasure. Vacation/pleasure travelers accounted for just 12 percent of fall/winter visitors. These figures vary dramatically from the summer market, among whom 82 percent were traveling for vacation/pleasure; 9 percent were VFR; 5 percent were business only; and 4 percent were business/pleasure. (Note: Comments in this report regarding the "business market" refer to business-only and business/pleasure travelers combined.)

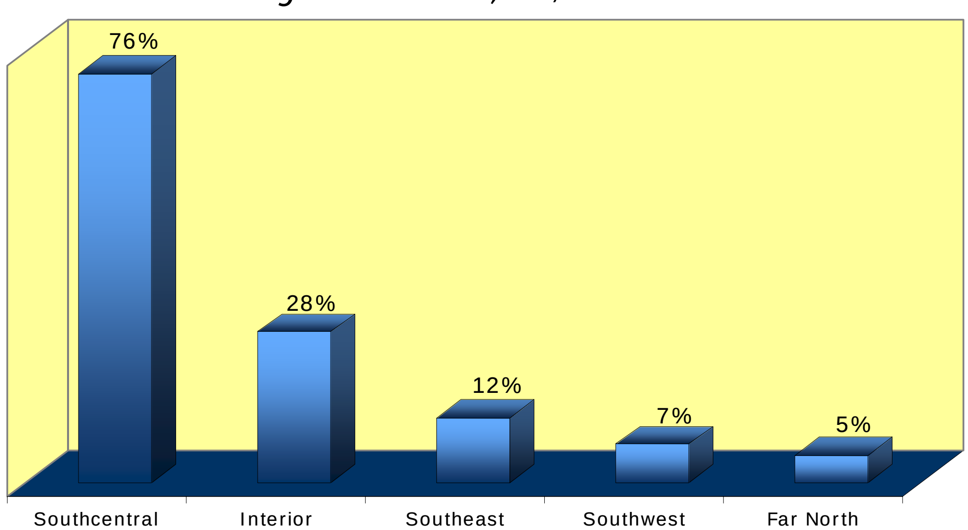
Trip Purpose, Fall/Winter 2006-07



Length of Stay and Destinations

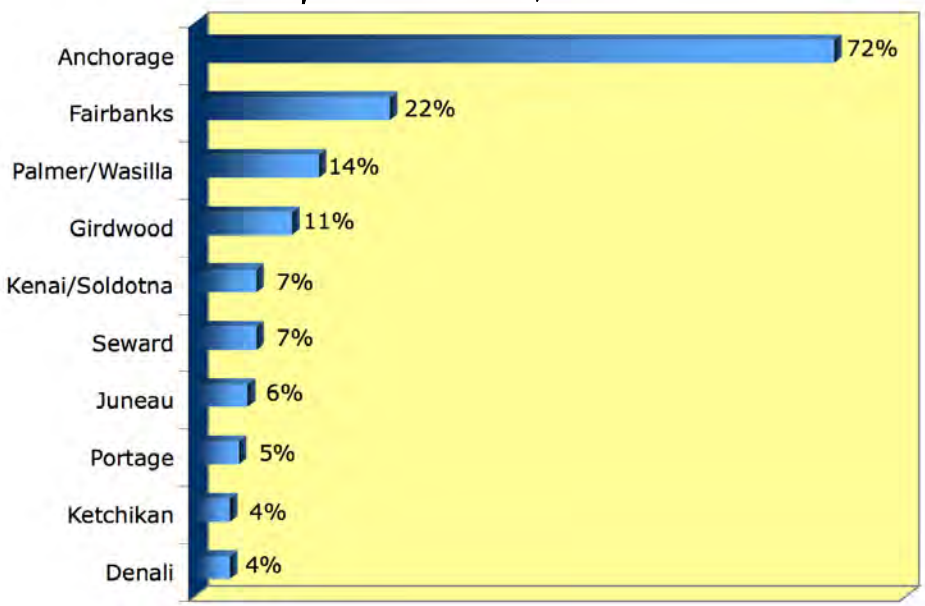
Visitors spent an average of 8.8 nights in the state in the fall/winter season. This figure ranged from 5.6 nights among vacation/pleasure travelers, to 8.2 nights among business visitors, to 10.4 nights among VFRs. Visitors were much more likely to visit Southcentral than any other region. The second most-visited region was the Interior, followed by Southeast, Southwest, and Far North. The following chart compares visitation by region.

Regional Visitation, Fall/Winter 2006-07



Anchorage was by far the most-visited community among fall/winter visitors, drawing 72 percent of the market. The next most-visited community was Fairbanks, followed by Palmer/Wasilla and Girdwood. While the Southeast region was visited by 12 percent of the market, the most popular Southeast community (Juneau) drew only 6 percent.

Top Ten Destinations, Fall/Winter 2006-07

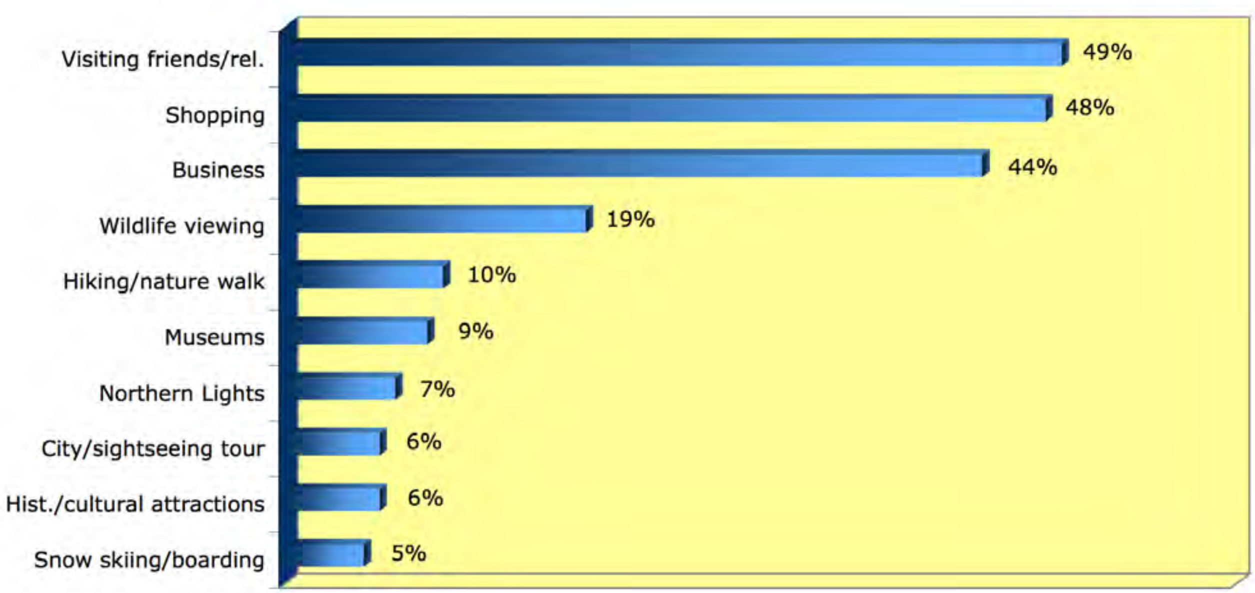


Destinations varied somewhat by trip purpose market. Business travelers were more likely than the average fall/winter visitor to visit Anchorage (78 percent) and Juneau (9 percent). Vacation/pleasure visitors tended to visit more places in Alaska, showing higher rates of visitation to Fairbanks (29 percent), Girdwood (20 percent), Seward (16 percent), and Portage Glacier (13 percent). VFRs were more likely to visit Palmer/Wasilla (19 percent). These figures reflect overall visitation, including day trips as well as overnight visits.

Activities

The most popular activities among Alaska visitors in the fall/winter season were visiting friends and relatives, shopping, and business. Participation rates drop off sharply after these three primary activities. Winter activities included Northern Lights viewing (7 percent), snow skiing/boarding (5 percent), dog sledding (4 percent), and snowmobiling (4 percent). Vacation/pleasure visitors participated in these activities at much higher rates than other visitors.

Top Ten Activities, Fall/Winter 2006-07

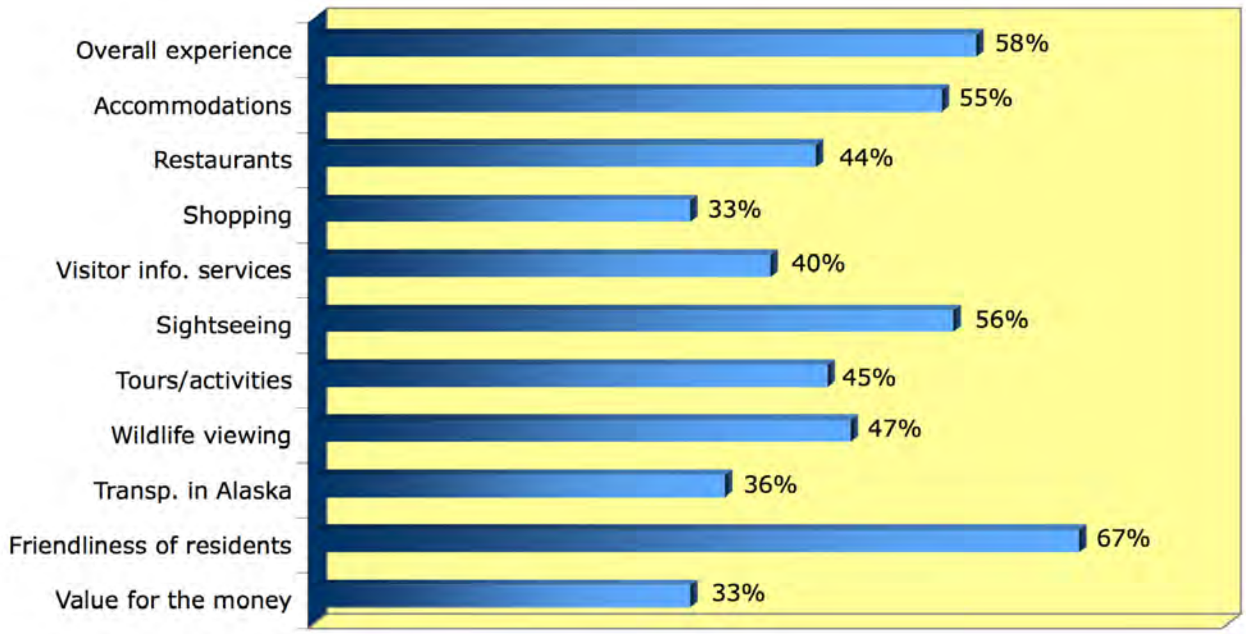


Note: Activity participation rates are based to intercept respondents only.

Satisfaction Ratings

Fall/winter visitors were generally satisfied with their overall Alaska experience, with 58 percent very satisfied, and another 40 percent satisfied. Only 1 percent were dissatisfied with their overall trip. Other categories with higher satisfaction ratings included friendliness of residents, sightseeing, and accommodations. The categories of shopping, value for the money, and transportation within Alaska received lower satisfaction ratings. Ratings among fall/winter visitors are generally lower than among summer visitors. For example, 70 percent of summer visitors were very satisfied with their overall experience, compared to 58 percent of fall/winter visitors. Among vacation/pleasure visitors, that percentage dropped from 71 to 60 percent.

Satisfaction Ratings, Fall/Winter 2006-07
Percent of Visitors "Very Satisfied"

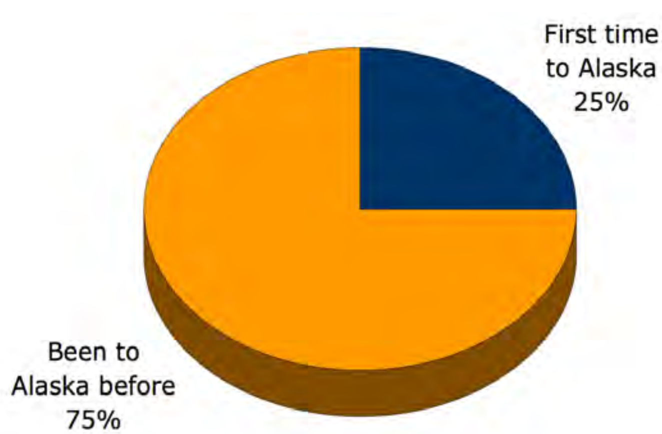


Previous Alaska Travel

Three-quarters of Alaska visitors in the fall/winter season had visited Alaska previously. This number ranged from 52 percent among vacation/pleasure visitors, to 74 percent among business visitors, to 82 percent among VFRs. The average number of previous Alaska vacation trips among repeat visitors was 6.1. Repeat rates were much higher among fall/winter visitors than among summer visitors (75 percent versus 34 percent).

Repeat visitors were asked how they entered and exited the state on their last trip. In response, 92 percent of repeat visitors said they traveled by air, 4 percent by cruise ship, 4 percent by highway, and 1 percent by ferry.

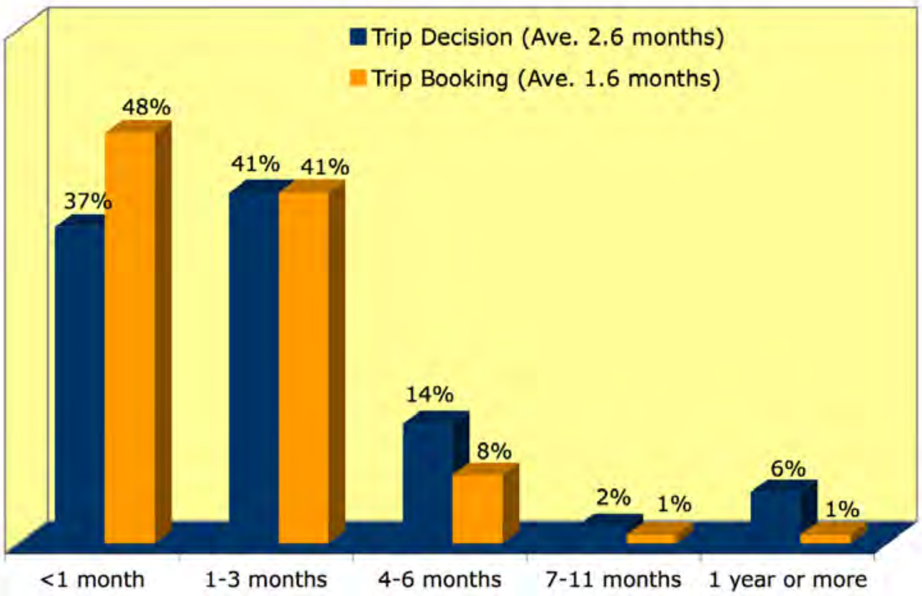
Repeat Travel to Alaska, Fall/Winter 2006-07



Trip Planning

All visitors were asked when they made their Alaska travel decision and how far ahead of time they booked their major travel arrangements. The chart below shows the average lead times and the responses in terms of ranges. The chart shows the peak booking time among fall/winter visitors: within one month of travel.

Advance Time for Trip Planning, Fall/Winter 2006-07



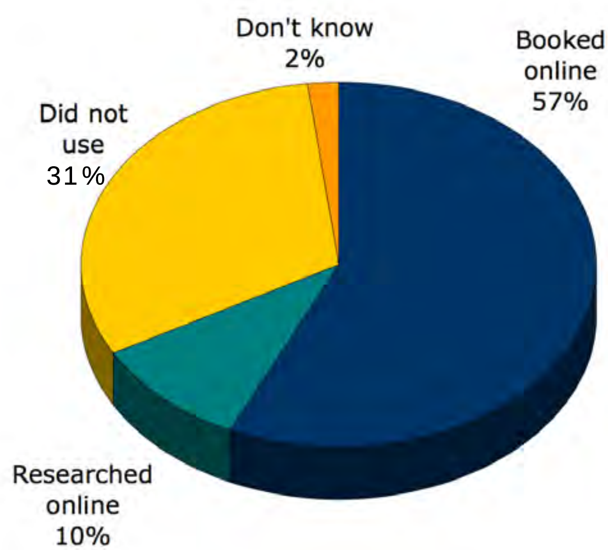
The average lead time for the trip decision was 2.6 months, and for trip booking 1.6 months, among all visitors. (This compares to 8.1 months and 5.4 months, respectively, among summer visitors.) Vacation/pleasure visitors showed longer average lead times, and business visitors shorter average lead times, when compared to the overall market.

Visitors were asked many questions about the sources they used in planning their trip. A series of questions dealt specifically with the Internet, revealing that 67 percent of visitors used the Internet to plan their trip. This figure includes 57 percent who booked at least one component online. The most common item booked online was airfare (54 percent) followed by lodging (17 percent) and vehicle rental (10 percent).

One in five fall/winter visitors reported booking at least some portion of their trip through a travel agent. The figure was higher among vacation/pleasure (33 percent) and business (28 percent) travelers. Travel agent usage in the fall/winter was much lower than in the summer, when 52 percent of visitors reported booking through a travel agent.

Visitors were asked if they used any sources other than the Internet and travel agents to plan their trip. Fall/winter visitors tended to mention very few sources other than prior experience (64 percent) and friends/family (47 percent). Vacation/pleasure visitors tended to do more research than other visitors, with higher usage of brochures, television, travel guides/books, and magazines, among others.

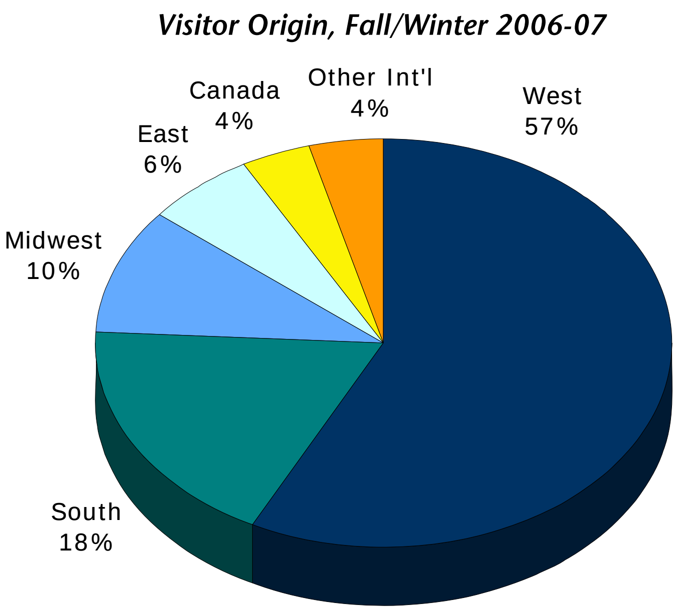
Internet Usage, Fall/Winter 2006-07



Note: Based to intercept respondents only.

Demographics

The survey collected a wide variety of demographic information, including origin, party size, gender, age, education and income.



Fall/winter visitors were much more likely to be from Western US states (57 percent) than any other region, triple the percentage from the South, the next most-common region of origin. Visitors were less likely to be from the Midwest or the East. Canada accounted for 4 percent of visitors, while another 4 percent were from other international countries.

VFRs and business travelers were nearly twice as likely to be from the West when compared to vacation/pleasure travelers. Vacation/pleasure travelers were much more likely to be from Canada or other international countries, particularly Asian countries.

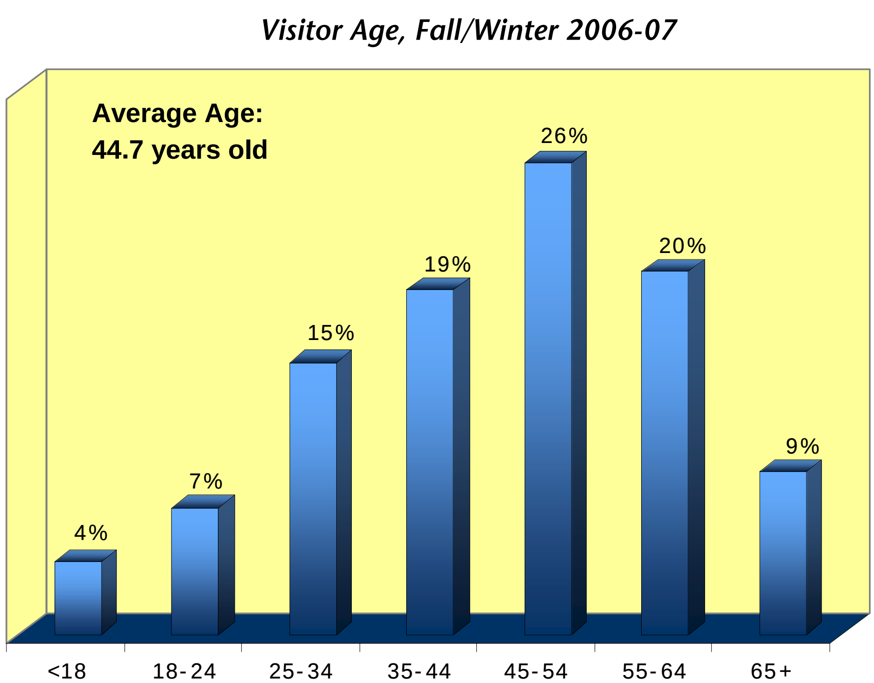
The average party size among summer visitors was 1.5 people, ranging from 1.3 among business visitors, to 1.5 among VFRs, to 2.2 among vacation/pleasure visitors. Two out of three visitors were traveling alone, while 25 percent were traveling in pairs, and 8 percent in parties of three or more.

Overall, fall/winter visitors were slightly more likely to be male. The average age reported was 45 years, slightly younger than the summer average of 52 years. The chart below illustrates the percentage of visitors in each age range.

One-third of fall/winter visitors reported children in their household, and 20 percent said they were either retired or semi-retired.

Six out of ten Alaska visitors had graduated from college, including 24 percent who had earned an advanced degree.

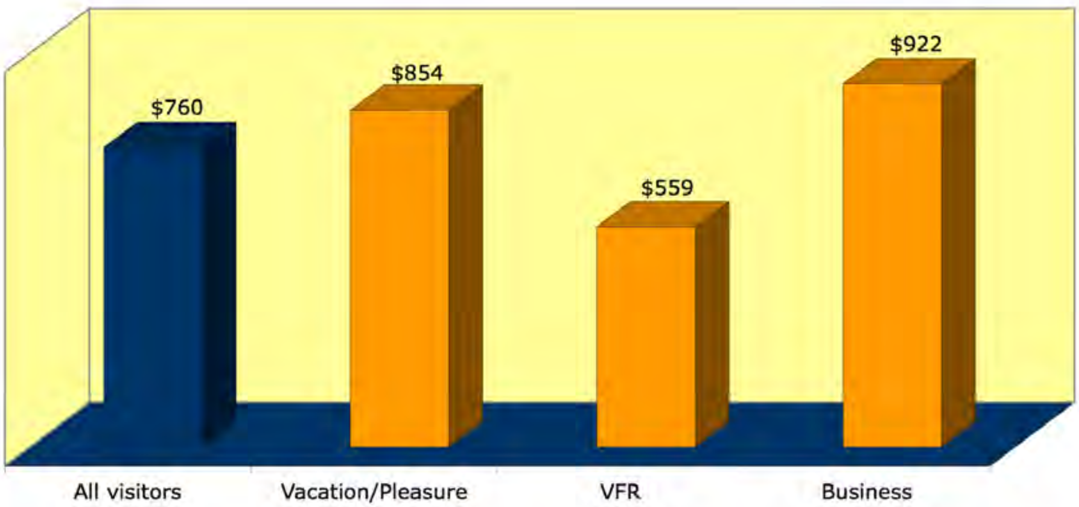
The average household income reported by visitors was $103,000 – identical to the summer average.



Expenditures

On average, fall/winter visitors spent $760 per person while in Alaska, not including the cost of transportation to enter and exit the state. This translates into $84 per person, per night. Spending varied considerably by trip purpose, as seen in the graph below. Business visitors spent the most per person, at $922. They were followed closely by vacation/pleasure visitors, who spent an average of $854 per person. VFRs reported the lowest average spending, at $559 per person.

Average Per-Person Expenditures, Fall/Winter 2006-07
Excludes travel to/from Alaska



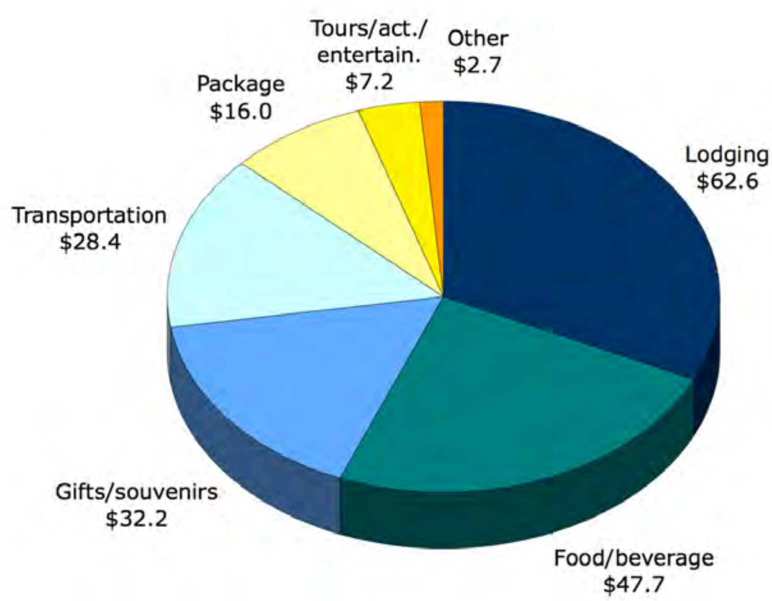
Note: Based to intercept respondents only.

Expenditure results indicate that fall/winter visitors to Alaska spent a total of $190 million on their Alaska trip, not including travel to and from the state. Vacation/pleasure visitors account for $25 million of this figure; VFRs for $59 million; and business visitors for $105 million.

The pie chart at right shows how total spending breaks down in terms of category. The largest share of total spending is attributable to lodging, at $63 million, followed closely by food/ beverage, then retail (including gifts, souvenirs, and clothing). Vacation/pleasure visitors accounted for small portions of each category: $5.9 million in lodging; $3.9 million in food/beverage; $4.2 million in retail; $6.6 million in transportation; and $1.3 million of tours and activities. They accounted for the vast majority of package spending: $12.6 out of $16.0 million.

Combining results of the Summer 2006 and Fall/Winter 2006-07 study periods, total *annual* expenditures are estimated at $1.7 billion.

Total Visitor Expenditures, Fall/Winter 2006-07
By Category, in Millions of Dollars



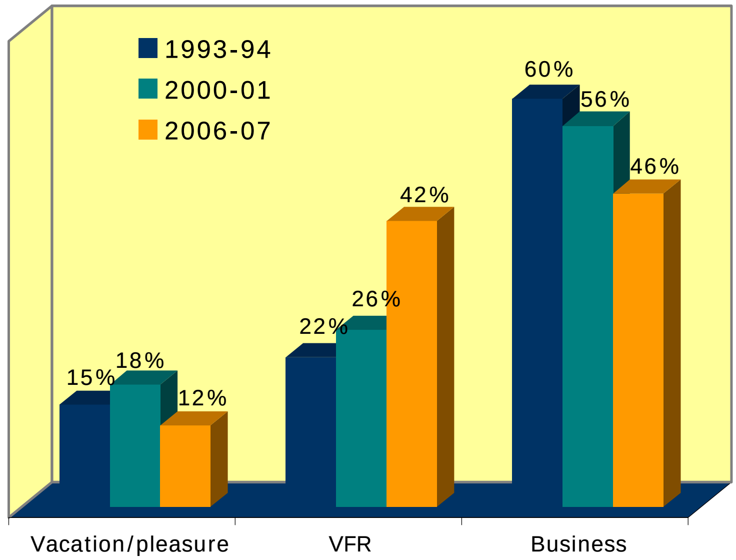
Trends

Changes in methodology and question wording over the generations of AVSP make some data difficult to compare over time. Some of the more comparable data include trip purpose, length of stay, party size, and age, among others.

The proportion of the fall/winter visitor market traveling for vacation or pleasure has decreased slightly over the years of AVSP, from 15 percent in 1993-94 to 12 percent in 2006-07. The VFR (visiting friends/relatives) market has increased over the same time period, from 22 to 42 percent of the market. The proportion traveling for business-only or business/pleasure has decreased, from 60 to 46 percent of the market.

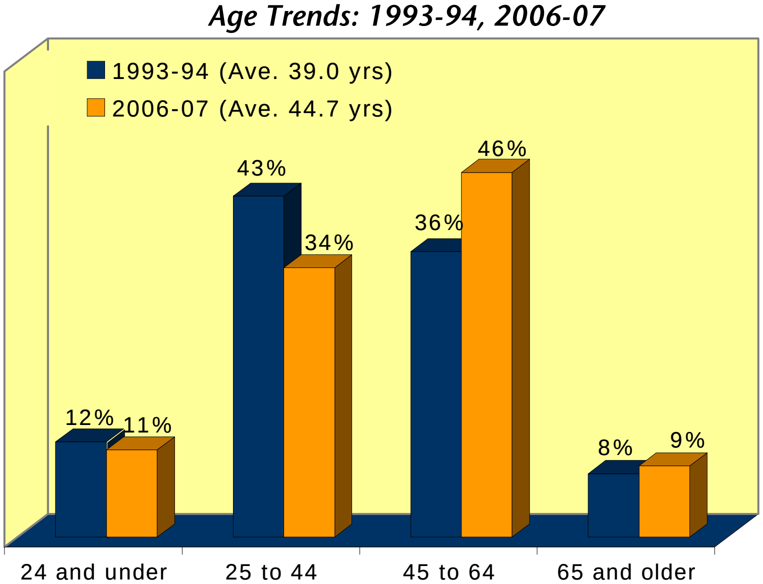
The average length of stay increased slightly between 1993-94 and 2006-07, from 8.2 to 8.8 nights. A more significant change is detectable in terms of ranges: the proportion staying seven nights or less grew from 55 percent to 69 percent, while those staying eight to 14 nights fell from 29 to 17 percent.

Trip Purpose Trends: 1993-94, 2000-01, 2006-07



Sources: 1993-94 data from AVSP III (conducted by McDowell Group); 2000-01 data from AVSP IV (conducted by Northern Economics).
Note: Business category includes business/pleasure visitors.

Age Trends: 1993-94, 2006-07



Source: 1993-94 data from AVSP III (conducted by McDowell Group).

The average age of fall/winter visitors increased from 39 years in 1993-94 to 45 years in 2006-07. Those 45 to 64 increased their share from 36 to 46 percent, while those in the 25 to 44 age group dropped from 43 to 34 percent. (Age data in 2000-01 was reported by decade, and was not reported in terms of average, making it difficult to compare with 1993-94 and 2006-07 data.)

Section II: Introduction

AVSP Overview

The Alaska Visitor Statistics Program is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community and Economic Development. The study provides the state government and the tourism industry essential information on one of Alaska's major economic engines: out-of-state visitors. Previous AVSP studies were undertaken in 1985, 1986, 1989, 1993 (all by McDowell Group), and 2001 (by Northern Economics). The project consists of two main components: an estimate of visitor volume, and a survey of visitors.

Visitor Volume

The Visitor Volume estimate is a count of the number of out-of-state visitors exiting Alaska, by transportation mode, during the study period. The estimate is based on traffic data (for example, highway border crossings, ferry disembarkations, airport enplanements) and visitor/resident ratios obtained at each exit point. Ratios are applied to the traffic data to arrive at the total visitor volume.

Visitor Survey

The Visitor Survey is administered to a sample of out-of-state visitors departing Alaska at all major exit points. The survey includes questions on trip purpose, transportation modes used, length of stay, destinations, lodging, activities, expenditures, satisfaction, trip planning, and demographics.

The study is undertaken in two stages: Summer 2006 (May 1-September 30) and Fall/Winter 2006-2007 (October 1-April 30). This report addresses the Fall/Winter period.

Project Team

The AVSP V project team was lead by the McDowell Group, Inc., a research and consulting firm with offices in Juneau, Anchorage, and Kodiak. The McDowell Group was the contractor for AVSP I, II, and III and has coordinated several other statewide visitor research projects, including the *Alaska Travelers Survey* in 2001, 2003 and 2005. For AVSP V, the McDowell Group was responsible for a majority of the study tasks: survey design, sample design, surveyor training, survey implementation, traffic data collection, and data analysis, among others.

Davis, Hibbitts & Midghall (DHM) is a market research firm based in Portland, Oregon. In addition to serving clients throughout the Pacific Northwest and California, the firm participated in AVSP I, II, and III. DHM had several roles in AVSP V. The firm set up and maintained the online survey, maintained the database for both intercept and online surveys, and managed the data processing. DHM also served in an advisory role during survey design, sample design, and data analysis, drawing on their previous experience with AVSP.

DataPath Systems, based in Whitehorse, Yukon Territory, is a full-service market research firm. The firm managed survey fielding and visitor/resident tallies in the four highway locations: Fraser Border Station (Klondike Highway), Pleasant Border Station (Haines Highway), Beaver Creek Border Station (Alcan Highway), and Dawson City (Top of the World Highway).

Acknowledgements

The AVSP V study team would like to acknowledge the following agencies and organizations for their assistance with the project.

Alaska Department of Commerce, Community and Economic Development
Alaska Travel Industry Association
Ted Stevens Anchorage International Airport
Fairbanks International Airport
Juneau International Airport
Ketchikan International Airport
Sitka Airport
Alaska Airlines
Alaska Marine Highway System
Alaska Marine Highway Ketchikan Terminal
Yukon border stations on the Alcan, Klondike, Haines, and Top of the World highways
Yukon Department of Tourism and Culture
Cruise Line Agencies of Alaska

Report Organization

The following section in this report (**Section III: Visitor Volume**) presents the visitor volume estimates. **Section IV: Visitor Profile** presents the results of the visitor survey. Survey results are organized into the following categories:

Trip Purpose and Packages
Transportation Modes
Length of Stay, Destinations & Lodging
Activities
Satisfaction Ratings
Previous Alaska Travel
Trip Planning
Demographics
Expenditures

Section V: Trends provides AVSP V survey data alongside results from the last two AVSP studies.

Section VI: Summary Profiles provides additional analysis based to 19 subgroups, organized into the following chapters:

Destinations
US Regions
International
Highway/Ferry & Package

Section VII: Methodology presents the methodology used in both the visitor volume estimate and visitor survey.

Changes for AVSP V

While AVSP V collects much of the same information as in previous generations of the study, several significant methodological changes were incorporated: an exit (rather than entry) methodology, the consolidation of three survey instruments into one instrument, and the use of online surveying. These are described in more detail, below.

Exit Methodology

All previous AVSP studies employed an "entry" methodology – that is, visitors were counted and administered surveys as they entered the state. AVSP V instituted an "exit" methodology. The visitor volume estimate was derived from exiting traffic data, and surveys were administered as visitors were exiting the state. The exit methodology has several advantages.

The response rates are significantly higher in an exit methodology

Previous AVSP studies involved three surveys, two of which were administered upon visitors' arrival into the state: an intercept survey (Random Arrival Survey) and a diary survey (Visitor Expenditure Survey). The third survey (Visitor Opinion Survey) was mailed out after visitors returned home. While this method was generally effective in the early days of AVSP, entering visitors became more time-sensitive and less willing to agree to be surveyed. This problem was compounded by new security rules in airports and on cruise ship docks that barred surveyors from disembarkation areas. With each subsequent AVSP study that used the entry methodology, visitors became less and less likely to agree to the intercept survey. They also became progressively less likely to return the VES diary and VOS mail-out survey. Between 1985 and 1993, summer VES response rates dropped from 70 to 55 percent, and summer VOS rates fell from 83 to 61 percent. In 2001, rates dropped to 19 percent for the VOS and 15 percent for the VES.[1] The 2006 exit survey, administered when visitors have completed their trip and are more willing to participate, earned a significantly higher intercept response rate (85.6 percent) – and eliminated the need for the diary and mail-out surveys. Higher response rates lead to larger sample sizes and increased fielding efficiencies.

An exit methodology allows for larger sample sizes

The advantages associated with the exit methodology allowed for much larger sample sizes than ever before. For AVSP IV Summer 2001, there were 3,722 RAS surveys, 714 VOS surveys, and 547 VES surveys. AVSP V (which combined the RAS, VOS and VES) included 2,703 intercept surveys and 2,956 online surveys, for a total sample size of 5,659. For AVSP IV Fall/Winter, there were 1,949 RAS surveys, 267 VOS surveys, and 323 VES surveys. AVSP V Fall/Winter included 1,055 intercept surveys and 223 online surveys, for a total sample size of 1,278. Larger sample sizes allow for greater statistical reliability and in-depth sub-sample analysis.

Exit surveys collect the most accurate trip information

A large portion of the data collected in previous AVSP studies, including trip activities, destinations, planning behavior, and satisfaction ratings, was filled out by the visitor well after the trip was completed. The exit

[1] These low response rates were likely compounded by added complexity of the instruments, the lack of prepaid cash incentives (used in 1985-1993), and changes in personal intercept methods.

methodology allows for visitors to share this information right as they are leaving the state, while their recall is strongest. In addition, the *intended* trip behavior information collected upon visitors' arrival in past AVSP studies becomes *actual* trip behavior data with the exit methodology, further improving the accuracy of the data.

An exit methodology allows for a single survey instrument

Because information is collected at the end of the trip, the previous multiple-instrument methodology was changed to allow for a more efficient, more effective single survey instrument. This issue is discussed in further detail, below.

Single Survey Instrument

Previous AVSP studies employed three instruments: Random Arrival Survey (RAS), Visitor Opinion Survey (VOS), and Visitor Expenditure Survey (VES). The RAS was a short intercept survey administered at entry points when respondents arrived into the state. This survey gathered information on trip purpose, transportation modes, type of trip (package versus independent), expected length of stay, demographics, and name and mailing address. RAS respondents were given an expenditure diary to carry with them, mailing it in at the end of their trip. The VOS (asking about destinations, activities, satisfaction ratings and other data) was mailed to their home to be filled out after returning home from their trip, often weeks later.

Surveying visitors upon exit allows all this information to be collected at the same time. Besides greater efficiency and increased sample sizes, combining the instruments has another important advantage over the multiple-instrument methodology: all survey respondents are asked the same questions. In the past, different kinds of visitor data referred to different survey samples. For example, trip purpose came from the RAS sample, while expenditure information came from the VES sample, and satisfaction ratings from the VOS sample. With a combined instrument, more information is available on each unique visitor, allowing for more extensive data analysis.

Online Component

AVSP V included an online survey component for the first time in 2006. Surveyors distributed "invitation cards" to out-of-state visitors who were exiting Alaska. Online respondents were targeted at the same time as intercept respondents: cards were distributed to visitors departing on the same flights, ferry voyages, cruise sailings, etc. as intercept respondents. The careful attention paid by surveyors to target online respondents in the same manner as intercept respondents resulted in parallel surveys (intercept and online) of virtually the same visitor population.

The card directed respondents to a web address, each card with its own unique password. As an incentive, respondents who completed the survey online were entered into a drawing to win one of several prizes. (See the Methodology section for further details on online survey methodology.)

The primary purpose of the online survey was to increase sample sizes, allowing for greater sub-sample analysis. This goal was achieved: in addition to 2,703 intercept surveys, the Summer 2006 sample includes

2,956 online surveys. The online survey also introduced a new alternative to the traditional AVSP intercept methodology – one that could be replicated in the future, and allow for more frequent, and more affordable, AVSP studies.

The card distribution methodology was modified for the Fall/Winter study period. Because visitor volume drops significantly during this time, it is more difficult to locate qualified respondents among the general traveling population. Cards were therefore distributed in the two locations with significant numbers of travelers: the Anchorage and Fairbanks airports.

Issues Associated with Methodology Changes

While the changes instituted in AVSP V were justified, and successful, it is important to acknowledge the concerns inherent with such changes.

Elimination of the spending diary

Previous AVSP studies employed "diaries" where respondents would record their spending as they traveled: where the money was spent, and each specific purchase. In 2006, respondents were asked to recall spending information after their trip was completed. While every effort was made to identify the type and location of spending, it can be difficult for respondents to remember what they spent days afterwards when compared to the diary methodology. There is an important trade-off, however: Summer AVSP V expenditure data is based on information collected from all 2,703 intercept respondents. This compares to 547 expenditure diaries in Summer AVSP IV (and between 1,200 and 1,600 diaries in AVSP I, II, and III). Even considering the less detailed data collection, the increase in sample size compensates for the loss of the expenditure diary.

Self-selection bias among online respondents

Self-selection bias occurs when the characteristics of respondents who choose to answer a survey differ from those of the overall target population. The risk of bias was noted in the summer 2006 online sample: it had a response rate of 17.5 percent, in contrast to the intercept response rate of 85.6 percent. To address this issue, the study team compared a wide range of demographic variables between the two samples, including gender, origin, age, income, and education. Only origin presented a potential bias: international visitors were less likely to complete the online survey, and visitors from certain regions of the US (South, Midwest) were slightly more likely to participate. To adjust for this bias, the online sample was weighted by origin so that it reflected the intercept sample. Another bias was apparent in trip planning sources. Online respondents were more thorough trip planners, using most sources at a higher rate than intercept respondents. For trip planning sources, only intercept data is presented in the report.

Analysis of trend data

- In terms of the visitor volume estimate, the switch from entry to exit methodology, by itself, does not affect the overall visitor number. Virtually the same volume of traffic, and the same number of visitors, entered and exited Alaska during the sample period. The estimate for AVSP V should actually be more accurate than in previous years, because the visitor/resident ratios are more precise – 49,703 tallies were completed in Summer 2006, compared to 21,907 in Summer 2001. However, there were several refinements of the methods used to count visitors – including, for example, specific data on the elimination of double-counting among highway visitors; usage of Alaska Marine Highway reservations data to determine actual, rather than estimated, visitor volume; and refining the exit mode categories to be more user-friendly. These refinements, while improving accuracy, make it difficult to compare the data directly to previous volume estimates.

- The survey data will differ somewhat from previous AVSPs. Some questions were modified, some were eliminated, and new questions were introduced as state and industry data needs evolved over time. The survey methods were changed – from a combination of intercept, diary, and mail-out methods – to a combination of intercept and online. Despite these many changes, a large portion of the data is comparable. Any inconsistencies are noted in the report.

The most important change between the survey data from previous AVSP studies and the latest generation is that, due to greatly increased sample sizes, there is significantly more data on significantly more visitors. Users of this report can have more confidence than ever before in the validity of the data.

The study team examined several known variables to test the accuracy of the survey sample and the visitor volume estimate. One was cruise ship visitation. The number of cruise passengers to each port is measured by Cruise Line Agencies of Alaska. These figures were tested against the percentage of the cruise market that said they visited each port in the survey, and the percentages were consistently within the margin of error or matched exactly. The data on visitor activities allowed the study team to make two additional verifications of survey results. According to the Alaska Department of Fish and Game, 331,075 non-resident fishing licenses were sold in calendar year 2006.[2] As a percentage of total summer visitors, that represents 20 percent of the overall market, matching the 20 percent of survey respondents who said they went fishing. The second verification is of White Pass and Yukon Route passengers. WP&YR reported passenger volume of 428,874 in summer 2006, representing 26 percent of the overall market – within 1 percentage point of the survey result of 27 percent.[3]

[2] *2006 Calendar Year License Sale Statistics,* State of Alaska Department of Fish and Game, www.admin.adfg.state.ak.us/admin/license/licstats.html. Virtually all non-resident sportfishing occurs between May and September.
[3] www.whitepassrailroad.com/news/september272006.html

Section III:
Visitor Volume

Introduction

This section presents estimates of the number of out-of-state visitors that came to Alaska between October 1, 2006 and April 30, 2007. This phase of the AVSP project involves three major tasks: conducting visitor/resident tallies at exit points, compiling exiting traffic data, and applying the visitor/resident ratios to the traffic data to arrive at visitor volume estimates. The following table shows where visitor/resident tallies were conducted, and how many passengers were tallied at each location.

Tally Locations and Volume
AVSP V – Fall/Winter 2006-2007

Mode	Tally Locations	Passengers Tallied
Domestic Air	Anchorage, Fairbanks, Juneau, Ketchikan, Sitka airports	22,265
International Air	Anchorage and Fairbanks airports	4,171
Highway	Border stations on Klondike, Haines, and Alcan highways	1,469
Ferry	Onboard ferries sailing between Ketchikan and Bellingham, and Ketchikan and Prince Rupert	706
	Total Tallied:	**28,611**

The tallies determined visitor/resident ratios for each location, by month. These ratios were applied to monthly traffic data collected from the following sources: Anchorage International Airport, Fairbanks International Airport, Alaska Airlines, Yukon Department of Tourism and Culture, and the Alaska Marine Highway System.

A full description of these tasks is provided in the Methodology section.

This section is divided into the following chapters:

Visitor Volume, Fall/Winter 2006-2007
Visitor Volume Trends
Visitor Volume, Regions and Communities

Visitor Volume, Fall/Winter 2006-07

Volume by Transportation Market

An estimated 249,500 out-of-state visitors came to Alaska between October 2006 and April 2007. Of this number, 237,000 were air visitors (entered and exited the state by air), and 12,500 were highway/ferry visitors (entered or exited the state by highway or ferry). Note that the definitions of these transportation *markets* differ from the traditional *exit mode* categories, shown in the second table below.

Visitor Volume, by Transportation Market
AVSP V – Fall/Winter 2006-2007

Market	Definition	Number of Visitors
Air	Entered *and* exited Alaska by air	237,000
Highway/ferry	Entered *or* exited Alaska by highway *or* ferry	12,500
Total	**All visitors**	**249,500**

Volume by Exit Mode

The following table shows how visitor volume breaks down by the transportation mode used to exit the state. In viewing these numbers, readers should keep in mind that some ferry visitors exit by highway, some highway visitors exit by air, etc. Readers are also advised that those exiting the state by international air do not represent the entire international market; many international visitors exit the state by other modes.

Visitor Volume, by Exit Mode
AVSP V – Fall/Winter 2006-2007

Exit Mode	Number of Visitors
Domestic Air	233,400
Highway	10,300
International Air	4,200
Ferry	1,600
Total	**249,500**

Volume by Trip Purpose

Over 100,000 visitors out of the total fall/winter volume of 249,500 were traveling to visit friends or relatives. Just under 100,000 were traveling for business only, while an additional 17,000 traveled for business and pleasure. The vacation/pleasure market accounted for approximately 30,000 visitors during fall/winter – this compares to 1.3 million who traveled to Alaska in summer 2006.

These volumes are based on results of the Visitor Survey. Survey respondents were asked to provide the main purpose of their trip. Seasonal workers were screened out of the survey, and are not considered visitors in this study. Trends in trip purpose rates can be found in the Visitor Trends section.

Visitor Volume, by Trip Purpose
AVSP V – Fall/Winter 2006-2007

Trip Purpose	Number of Visitors
Visiting friends or relatives	105,500
Business	97,300
Vacation/pleasure	29,700
Business and pleasure	17,000
Total	**249,500**

Volume by Region of Origin

Visitors from the Western US represented over half of all Alaska visitors in fall/winter 2006-2007, for a total market size of nearly 143,000. The West was followed by the South, Midwest, and East in terms of market size. The international market represented over 20,000 visitors, including 10,000 from Canada.

These volumes are based on results of the Visitor Survey. Each visitor was asked what state or country they were visiting from. Additional details on visitors' state and country of origin can be found in the Visitor Profile section.

Visitor Volume, by Region of Origin
AVSP V – Fall/Winter 2006-2007

Region of Origin	Number of Visitors
Western US	142,700
Southern US	44,900
Midwest US	25,000
Eastern US	16,200
Canada	10,000
Other international	10,700
Total	**249,500**

Full Year Visitor Volume

The following table shows visitor volume for the 12-month period of May 2006 through April 2007, combining results from the Summer and Fall/Winter study periods. Approximately 1.9 million out-of-state visitors came to Alaska during the 12-month period, with 87 percent visiting during the five-month summer season. Out of the full-year visitor volume, 54 percent exited by domestic air; 40 percent by cruise ship; 4 percent by highway; 1 percent by international air; and 1 percent by ferry.

Full Year Visitor Volume, by Exit Mode
AVSP V – 2006-2007

	Summer 2006	Fall/Winter 2006-07	Full Year
Domestic Air	779,200	233,400	1,012,600
Cruise Ship[1]	758,100	0	758,100
Highway	65,800	10,300	76,100
International Air	16,700	4,200	20,900
Ferry	11,700	1,600	13,300
Total	**1,631,500**	**249,500**	**1,881,000**

[1] The total number of cruise ship visitors to Alaska in Summer 2006 was 958,900. See the AVSP Summer 2006 report for further details on summer visitor volume.

The table below shows full-year visitor volume by "transportation market." These figures show the actual volume of cruise ship traffic in relation to other modes, whereas the previous table reflects only those passengers exiting the state via cruise ship. Out of the full-year visitor volume, 51 percent were cruise ship passengers, 44 percent were air visitors (entered and exited the state by air), and 5 percent were highway/ferry visitors (entered or exited the state by highway or ferry).

Full Year Visitor Volume, by Transportation Market
AVSP V – 2006-2007

	Summer 2006	Fall/Winter 2006-07	Full Year
Cruise Ship[1]	958,900	0	958,900
Air	587,800	237,000	824,800
Highway/Ferry	84,800	12,500	97,300
Total	**1,631,500**	**249,500**	**1,881,000**

Visitor/Resident Ratios

The following table shows the percentage of traffic for each exit mode that was out-of-state visitors in fall/winter 2006-2007. These ratios are a composite of ratios collected by location, on a monthly basis. Because they were applied to traffic data on a monthly and by-location basis, they cannot be applied to overall traffic numbers. Details on how these ratios were collected and applied to traffic data can be found in the Methodology section.

It is important to note that the highway ratio refers to highway travelers who are exiting the state for the final time on their trip. This eliminates the possibility of double-counting visitors who exit the state twice – for example, ferry passengers who exit the state at Beaver Creek, then re-enter at Haines to board a ferry.

Visitor/Resident Ratios, by Mode
AVSP V – Fall/Winter 2006-2007

Exit Mode	Percentage Visitors
Domestic Air	32.2%
International Air	48.7%
Highway[1]	24.2%
Ferry	20.6%
Total	**31.8%**

[1] The highway ratio refers to "last-exit" visitors: not planning to re-enter Alaska on the same trip.

Visitor Volume Trends

The table below shows trends in estimated visitor volume by mode of entry (2000-01 to 2003-04) and exit (2004-05 to 2006-07). The change from entry to exit methodology does not affect the data; virtually the same number of visitors entered Alaska as exited Alaska in any given year. The apparent drop in visitation between 2003-04 and 2004-05 (by 4.1 percent) could be a reflection of updated data sources and ratios, rather than an actual decrease. The volume reported for the first four study periods is based on ratios collected in 2000-2001, while the volume for the last three study periods is based on ratios collected in 2006-2007.

Other than the decrease between the 2003-04 and 2004-05 seasons, fall/winter visitor volume appears to be holding steady, with annual traffic shifts in the 1 to 3 percent range.

Trends in Visitor Volume, By Entry/Exit Mode, 2000-2007
AVSP V – Fall/Winter 2006-2007

Entry/Exit	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Air	238,700	235,500	237,100	241,500	234,100	231,800	237,600
Highway	14,000	13,800	13,900	13,900	10,800	9,900	10,300
Ferry	1,500	1,600	1,600	1,700	1,600	1,500	1,600
Total	**254,200**	**250,900**	**252,600**	**257,100**	**246,500**	**243,200**	**249,500**
% change	**n/a**	**-1.3%**	**+0.7%**	**+1.8%**	**-4.1%**	**-1.3%**	**+2.6%**

Note: 2000-01 to 2003-04 data based on entry mode; 2004-05 to 2006-07 data based on exit mode.
Sources: 2000-01 to 2003-04 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.); 2004-05 and 2005-06 data based on 2006-07 visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).

The table below shows trends in estimated visitor volume for the 12-month period between May and April. Full-year visitation increased from 1.5 million in 2001-02 to 1.9 million in 2006-07. The data shows a large increase between 2004-05 and 2005-06. This growth is partly attributable to updated data sources and methodology. The data between May 2001 and September of 2004 was based on visitor/resident ratios collected between October 2000 and September 2001, while the data between October 2004 and April 2007 was based on ratios collected between May 2006 and April 2007. For more information on the differences between the two sets of data, please refer to the Summer AVSP report.

Trends in Full-Year Visitor Volume, By Entry/Exit Mode, 2001-2007
AVSP V

Entry/Exit	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Air	824,400	831,400	834,400	869,700	1,018,500	1,033,500
Highway	100,500	96,800	94,300	94,000	82,000	76,100
Cruise ship	510,000	581,000	620,900	712,400	761,100	758,100
Ferry	18,800	18,400	17,600	17,800	13,600	13,300
Total	**1,453,700**	**1,527,600**	**1,567,200**	**1,693,900**	**1,875,200**	**1,881,000**
% change	**n/a**	**+5.1%**	**+2.6%**	**+8.1%**	**+10.7%**	**+0.3%**

Notes: 2001-02 to 2004-05 data based on entry mode; 2005-06 to 2006-07 data based on exit mode.
The 2000-01 period is not included because there was no Summer 2000 visitor volume estimate.
Sources: 2001-02 to 2004-05 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.); 2005-06 and 2006-07 data based on 2006-07 visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).

Visitor Volume, Regions and Communities

The table below shows the estimated number of visitors to each region and community, based on data collected in the Visitor Survey. Percentage visitation to each community for both overall and overnight-only visitation can be found in the Visitor Profile chapter. Communities with an estimated visitation of less than 5,000 visitors are not included in the volume estimates because their percentage visitation falls outside an acceptable margin of error.

Visitor Volume, Regions and Communities
AVSP V - Fall/Winter 2006-2007

Region/Community	Number of Visitors
Southcentral	**190,000**
Anchorage	181,000
Palmer/Wasilla	36,000
Kenai Peninsula	35,000
Seward	19,000
Kenai/Soldotna	19,000
Homer	9,000
Girdwood/Alyeska	27,000
Portage	12,000
Whittier	6,000
Talkeetna	5,000
Interior	**69,000**
Fairbanks	56,000
Denali	9,000
Southeast	**30,000**
Juneau	16,000
Ketchikan	10,000
Sitka	5,000
Southwest	**16,000**
Kodiak	6,000
Far North	**11,000**

Section IV:
Visitor Profile

This section presents results of the visitor survey, conducted with out-of-state visitors exiting Alaska between October 2006 and April 2007. Visitors were surveyed at all major exit points: airports, highways, and ferries. A total of 1,278 randomly-selected visitors were surveyed, for a maximum margin of error of ±2.7 percent at the 95 percent confidence level.[1] All data was weighted to reflect actual traffic volumes by mode of transportation. The survey methodology is explained in detail in the final section of this report.

This primary analysis is organized into the following categories:

Trip Purpose and Packages
Transportation Modes
Length of Stay, Destinations & Lodging
Activities
Satisfaction Ratings
Previous Alaska Travel
Trip Planning
Demographics
Expenditures

The data in this section is presented for the entire visitor market ("All Visitors") as well as by "Trip Purpose." The following table shows how each market is defined, their respective sample sizes, and their maximum margin of error.

Sub-Sample Definition and Margin of Error

Market	Definition	Sample Size	Maximum Margin of Error[1]
All Visitors	All respondents	1,278	±2.7%
Vacation/Pleasure	Main purpose of trip was vacation or pleasure	268	6.0
Visiting Friends/ Relatives (VFR)	Main purpose of trip was to visit friends or relatives	451	4.6
Business	Main purpose of trip was business *or* business and pleasure	559	4.1

For several tables in this section, footnotes indicate that the results are based to "intercept respondents only." This means that for the particular question, online respondents were eliminated from the base due to potential question misinterpretation or bias. A discussion of this issue is provided in the Methodology section. The table below shows the sample size and maximum margin of error for the intercept-only sample.

Intercept Sample Sizes
By Trip Purpose

Market	Sample Size	Maximum Margin of Error
All Visitors	1,055	±3.0%
Vacation/Pleasure	227	6.5
Visiting Friends/Relatives	387	5.0
Business	441	4.7

[1] Most survey responses are more accurate than maximum error factors suggest, due to the nature of response distribution in sampling statistics.

Trip Purpose

Every survey respondent was asked "What is the main purpose for this trip?" Their responses fell into one of four categories: vacation/pleasure, visiting friends/relatives, business, or business/pleasure. Seasonal workers were screened out of the survey.

The most common trip purpose for fall/winter visitors was visiting friends or relatives (VFR), accounting for 42 percent of visitors. Close behind was business at 39 percent, with another 7 percent traveling for business *and* pleasure. Vacation/pleasure travelers (who made up 82 percent of the summer market) accounted for just 12 percent of fall/winter visitors.

A visitor's trip purpose has a major impact on their activities, expenditures, length of stay, trip planning, and other variables. The remainder of tables in this chapter provide results by trip purpose, with business and business/pleasure combined. A comparison of trip purpose rates over the years of AVSP can be found in the Trends section.

Trip Purpose

	All Visitors
Visiting friends or relatives	42%
Business only	39
Vacation/pleasure	12
Business and pleasure	7

Packages

Just 4 percent of the fall/winter visitor market purchased multi-day travel packages. Vacation/pleasure visitors were much more likely to purchase packages (27 percent) than either VFRs or business travelers (both at 1 percent).

Purchase of Multi-Day Packages
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Purchased package	4%	27%	1%	1%
Did not purchase package	94	71	97	97
Don't know	2	2	1	2

Visitors who had purchased a multi-day package (4 percent of all visitors) were asked what type of package they had purchased. About half (49 percent) were on some kind of winter package, such as Northern Lights viewing, skiing, dog-sledding, and attending the Iditarod sled dog race. "Adventure tour packages" were mentioned by 20 percent. This was followed by wilderness lodge package at 14 percent, motorcoach tour at 12 percent, and rail package at 4 percent.

Modes of Transportation

The following table shows how visitors entered the state, exited the state, and traveled around the state. Nearly all fall/winter travelers enter and exit the state by air, with just 3 to 4 percent using the highway and 1 percent riding the ferry. Vacation/pleasure visitors were more likely to travel via highway and ferry.

Respondents who entered and exited by highway were also asked what kind of vehicle they were using. The vast majority were in cars/trucks/vans, with less than 15 percent in RVs or campers.

Visitors were asked whether they used specific forms of transportation to travel between communities within Alaska. Personal and rental vehicles and airplanes were the primary modes of transport around the state. VFRs were much more likely to use personal vehicles; vacation/pleasure visitors were more likely to use rental vehicles; and business travelers were more likely to use air. A significant portion of visitors (42 percent) answered "none of the above," meaning they stayed in one community for their Alaska trip.

Transportation Modes
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Mode of Entry into Alaska				
Air	96%	84%	97%	97%
Highway	4	14	2	2
Ferry	1	2	1	<1
Mode of Exit from Alaska				
Air	97%	85%	98%	99%
Highway	3	12	2	1
Ferry	1	2	1	<1
Used to Travel Between Communities[1]				
Personal vehicle	21%	14%	38%	7%
Air	19	11	17	24
Rental vehicle	18	26	11	22
State ferry	2	6	2	1
Motorcoach/bus	1	8	<1	1
Personal RV	1	1	1	1
Rental RV	<1	<1	-	1
Train	1	5	-	<1
None of the above	42	34	38	47
Don't know/refused	1	2	<1	1

[1] Based to intercept respondents only.

Length of Stay

Visitors reported an average length of stay in Alaska of 8.8 nights. This figure ranged from 5.6 nights among vacation/pleasure travelers to 10.4 nights among VFRs. The most common trip length fell between four and seven nights, accounting for nearly half of visitors. The average of 8.8 nights is slightly below the average length of stay among summer visitors (9.1 nights).

Length of Stay in Alaska
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Three nights or less	24%	29%	11%	34%
Four to seven nights	45	51	49	41
Eight to 14 nights	17	17	23	12
15 to 21 nights	6	1	8	5
22 or more nights	7	2	9	8
Average number of nights	**8.8**	**5.6**	**10.4**	**8.2**

Lodging

Fall/winter visitors tend to stay primarily in hotels/motels (57 percent) and private homes (44 percent) while in Alaska. Not surprisingly, vacation/pleasure and business visitors were much more likely to use hotels/motels, while VFRs tended to stay in private homes.

Lodging Types Used
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Hotel/motel	57%	77%	23%	84%
Private home	44	23	84	14
Lodge	3	13	2	2
B&B	2	4	1	3
Wilderness camping	1	2	1	1
State/national campground	1	<1	1	-
Commercial campground	<1	1	<1	<1
Other[1]	9	11	3	14

[1] Other lodging types included company-owned housing, college dormitories, and youth hostels.

Destinations

The following pages show three different analyses of where visitors went in Alaska: overall visitation, overnight visitation, and the average number of nights spent in each location (based to those who overnighted in each location).

Southcentral is the primary destination in the fall/winter market, drawing 76 percent of all visitors, including 74 percent who overnighted in the region. The next most-visited regions were: the Interior at 28 percent of visitors (including 24 percent who overnighted); Southeast at 12 percent (including 10 percent who overnighted): Southwest at 7 percent (all of whom overnighted); and Far North at 5 percent (including 4 percent who overnighted). (On the Alaska Travel Industry Assocation map below, Southeast is shown as Inside Passage.)

Anchorage was by far the most-visited community among fall/winter visitors, drawing 72 percent of the market. The next most-visited community was Fairbanks at 22 percent, followed by Palmer/Wasilla (14 percent) and Girdwood (11 percent).

Destinations varied somewhat by trip purpose market. Business travelers were more likely to focus on Southcentral and Anchorage. Vacation/pleasure visitors were more likely to visit the Interior and Fairbanks. They were also more likely to visit Southeast.

The average number of nights is reported for communities and regions with sample sizes over 50. Southwest attracted the longest-staying visitors, at 12.7 nights in the region, followed by Southeast at 10.6 nights. The average number of nights spent in Southcentral and the Interior were nearly equal, at 7.0 and 7.1 nights, respectively.

Profiles of visitors to individual communities are provided in the Summary Profiles section. Regional visitation over the past several AVSPs is presented in the Trends section.

Destinations Visited (Day or Overnight)
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Southcentral	**76%**	**62%**	**75%**	**81%**
Anchorage	72	59	70	78
Palmer/Wasilla	14	18	19	9
Kenai Peninsula	14	22	15	11
Kenai/Soldotna	7	8	8	7
Seward	7	16	8	5
Homer	3	6	5	1
Other Kenai Peninsula	2	3	2	1
Girdwood/Alyeska	11	20	12	8
Portage	5	13	5	2
Whittier	2	5	3	1
Talkeetna	2	5	2	1
Valdez	1	3	1	1
Prince William Sound	1	2	-	1
Other Southcentral	3	13	1	2
Interior	**28%**	**41%**	**23%**	**29%**
Fairbanks	22	29	18	25
Denali	4	7	4	2
Glennallen	1	4	1	1
Tok	1	3	1	<1
Other Interior	5	9	3	5
Southeast	**12%**	**19%**	**9%**	**12%**
Juneau	6	5	4	9
Ketchikan	4	5	4	4
Sitka	2	2	2	2
Haines	1	5	1	1
Skagway	1	6	<1	1
Prince of Wales Island	1	2	1	1
Wrangell	1	<1	1	1
Petersburg	<1	<1	<1	1
Glacier Bay/Gustavus	<1	-	<1	1
Hoonah/Icy Strait Point	<1	<1	<1	<1
Other Southeast	1	2	1	<1
Southwest	**7%**	**4%**	**5%**	**9%**
Kodiak	3	4	3	2
Other Southwest	4	<1	2	7
Far North	**5%**	**2%**	**3%**	**7%**
Nome	1	-	2	<1
Other Far North	4	2	1	7

Overnight Destinations
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Southcentral	**74%**	**63%**	**72%**	**78%**
Anchorage	65	51	59	75
Kenai Peninsula	7	10	8	6
Kenai/Soldotna	3	3	4	2
Homer	3	5	4	1
Seward	1	2	<1	2
Other Kenai Peninsula	1	2	2	1
Palmer/Wasilla	6	2	12	2
Girdwood/Alyeska	3	11	2	1
Valdez	1	3	1	1
Talkeetna	1	2	<1	1
Prince William Sound	<1	-	-	<1
Other Southcentral	1	5	1	<1
Interior	**24%**	**36%**	**21%**	**23%**
Fairbanks	21	30	17	22
Denali	1	2	2	<1
Glennallen	1	2	1	1
Tok	1	2	1	<1
Other Interior	3	6	1	3
Southeast	**10%**	**16%**	**9%**	**11%**
Juneau	5	5	4	7
Ketchikan	3	4	3	3
Sitka	2	2	1	2
Haines	1	3	1	1
Prince of Wales Island	1	2	1	1
Skagway	1	2	-	1
Wrangell	<1	-	<1	1
Petersburg	<1	-	<1	1
Hoonah/Icy Strait Point	<1	-	<1	<1
Glacier Bay/Gustavus	<1	-	-	<1
Other Southeast	1	1	1	<1
Southwest	**7%**	**5%**	**5%**	**9%**
Kodiak	2	5	2	2
Other Southwest	4	-	2	7
Far North	**4%**	**1%**	**2%**	**6%**
Nome	1	-	2	<1
Other Far North	3	1	1	6

Average Number of Nights

Base: Those who overnighted in each destination

By Trip Purpose

	Overnight Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Southcentral	**7.0**	**5.3**	**9.1**	**5.6**
Anchorage	6.2	3.9	8.2	5.1
Kenai Peninsula	6.0	*	*	*
Interior	**7.1**	**5.5**	**8.2**	**6.8**
Fairbanks	6.0	5.5	7.5	5.2
Southeast	**10.1**	**8.3**	**13.1**	**8.5**
Juneau	5.9	*	7.6	5.1
Ketchikan	5.9	*	7.7	3.8
Sitka	11.0	*	*	*
Southwest	**12.7**	*****	*****	*****

Note: Averages are reported for sample sizes of 50 or greater. " * " indicates a sample under 50.

Activities

Visitors were shown a list of activities and asked which of them they had participated in while in Alaska. Visiting friends and relatives topped the list, with half of visitors saying they participated in this activity – including 96 percent of VFRs, 22 percent of vacation/pleasure visitors, and 13 percent of business visitors. Shopping was also a popular activity, more common among vacation pleasure visitors (68 percent) than among VFRs (54 percent) or business travelers (37 percent). The third most-popular activity was business – accounting for 95 percent of business travelers, and just 1 percent of VFRs and vacation/pleasure visitors.

Participation rates drop off sharply after these three primary activities. Only two more activities were mentioned by more than 10 percent of respondents: wildlife viewing (19 percent) and cultural activities (14 percent), which includes museums, historical/cultural attractions, and Native cultural tours/activities. Vacation/pleasure visitors participated in these activities at much higher rates: 27 percent for wildlife viewing and 34 percent for cultural activities.

Winter activities included Northern Lights viewing (7 percent), snow skiing/boarding (5 percent), dog sledding (4 percent), and snowmobiling (4 percent). Again, vacation/pleasure visitors participated in these activities at higher rates: 19 percent for Northern Lights viewing, 9 percent for snow skiing/boarding, 13 percent for dog sledding, and 7 percent for snowmobiling.

Activity Participation[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Visiting friend/relatives	49%	22%	96%	13%
Shopping	48	68	54	37
Business	44	1	1	95
Wildlife viewing	19	27	22	15
Birdwatching	4	9	6	2
Cultural activities	14	34	12	10
Museums	9	23	8	6
Historical/cultural attractions	6	12	5	5
Native cultural tours/ activities	3	4	3	3
Gold panning/mine tour	<1	<1	<1	1
Hiking/nature walk	10	15	13	7
Northern Lights viewing	7	19	7	4
City/sightseeing tours	6	13	6	4
Snow skiing/boarding	5	9	6	3
Dog sledding	4	13	3	3
Snowmobiling	4	7	5	1
Fishing	3	4	4	1
Unguided fishing	3	3	4	1
Guided fishing	<1	1	<1	<1
Flightseeing	2	6	2	2
Tramway/gondola	2	7	1	1
Day cruises	2	4	2	1
Hunting	1	5	2	<1
Shows/Alaska entertainment	1	1	2	1
Camping	1	4	1	1
Alaska Railroad	1	4	-	<1
Biking	<1	<1	1	<1
Salmon bake	<1	2	<1	-
Other	2	4	4	<1

[1] Based to intercept respondents only.

Compared to Expectations

When asked how well their Alaska trip had lived up to their expectations, nearly half of visitors (44 percent) said it was either higher or much higher than expectations. Another 54 percent said it was about what they expected. Only 2 percent said the trip was below expectations. The overall compared-to-expectations rating was 3.6 on a 1-5 scale. Ratings on this question were generally lower than among summer visitors, 61 percent of whom said their trip was higher than expectations. (This is largely due to the drop in vacation/pleasure visitors, who tend to give higher ratings to their Alaska trip.)

Alaska Trip Compared to Expectations
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business/ Pleasure
5 - Much higher than expectations	17%	24%	14%	21%
4 - Higher than expectations	27	30	25	38
3 - About what you expected	54	41	59	40
2 - Below expectations	2	5	2	2
1 - Far below expectations	-	-	-	-
Average 1-5	**3.6**	**3.7**	**3.5**	**3.8**

Note: Business only visitors were screened out of this question.

Value for the Money

When asked how Alaska compared to other destinations in terms of value for the money, the most common answer (chosen by 51 percent of respondents) was "about the same." More visitors thought the value was better or much better (36 percent) than those who thought the value was worse or much worse (13 percent). Fall/winter ratings closely resemble summer ratings for value.

Value for the Money
Compared with other vacation destinations visited in the past five years
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business/ Pleasure
5 - Much better	15%	16%	16%	13%
4 - Better	21	23	19	32
3 - About the same	51	53	51	44
2 - Worse	12	8	13	11
1 - Much worse	1	-	1	<1
Average 1-5	**3.4**	**3.5**	**3.3**	**3.5**

Note: Business only visitors were screened out of this question.

Satisfaction by Category

Visitors were asked their satisfaction with a wide array of categories, shown in the table below. They were given five options: very satisfied, satisfied, neither/neutral, dissatisfied, and very dissatisfied. A full list of responses to these questions are presented on the following pages. The table below shows the "very satisfied" ratings only.

Fall/winter visitors were generally satisfied with their overall Alaska experience, with 58 percent very satisfied, and another 40 percent satisfied. Only 1 percent were dissatisfied with their overall trip. Average trip ratings were 4.5 on a 1-5 scale.

Categories with the highest number of very satisfied ratings include: friendliness of residents (67 percent), overall experience (58 percent), sightseeing (56 percent), and accommodations (55 percent). As in the summer survey, the categories of shopping and value for the money received a low percentage of very satisfied ratings (both at 33 percent). Transportation within Alaska also received fewer very satisfied ratings (36 percent). Categories in the middle range of satisfaction include wildlife viewing (47 percent), tours and activities (45 percent), restaurants (44 percent), and visitor information services (40 percent).

Dissatisfaction was generally very low, accounting for fewer than 4 percent of responses for most categories. Only two categories earned 4 percent or more dissatisfied ratings: value for the money (6 percent) and wildlife viewing (4 percent).

Satisfaction ratings among fall/winter visitors are generally lower than among summer visitors. For example, 70 percent of summer visitors were very satisfied with their overall experience, compared to 58 percent of fall/winter visitors. Among vacation/pleasure visitors, that percentage dropped from 71 to 60 percent.

Satisfaction Ratings: Summary
% "Very Satisfied"
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Overall experience in Alaska	58%	60%	60%	55%
Accommodations	55	52	66	46
Restaurants	44	42	42	45
Shopping	33	32	36	29
Visitor information services	40	52	37	38
Sightseeing	56	55	56	55
Tours and activities	45	55	43	41
Wildlife viewing	47	46	47	48
Transportation within Alaska	36	38	34	36
Friendliness of residents	67	67	65	70
Value for the money	33	33	39	28

Note: "Don't know/does not apply" responses have been removed from the base for each category.

Satisfaction Ratings
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Overall experience in Alaska				
5 - Very satisfied	58%	60%	60%	55%
4 - Satisfied	40	37	39	41
3 - Neither/neutral	2	2	1	2
2 - Dissatisfied	1	1	<1	1
1 - Very dissatisfied	-	-	-	-
Average 1-5	**4.5**	**4.6**	**4.6**	**4.5**
Accommodations				
5 - Very satisfied	55%	52%	66%	46%
4 - Satisfied	38	39	30	44
3 - Neither/neutral	6	7	3	8
2 - Dissatisfied	1	2	1	1
1 - Very dissatisfied	<1	-	<1	<1
Average 1-5	**4.5**	**4.4**	**4.6**	**4.3**
Restaurants				
5 - Very satisfied	44%	42%	42%	45%
4 - Satisfied	46	44	45	46
3 - Neither/neutral	7	12	7	7
2 - Dissatisfied	3	2	5	2
1 - Very dissatisfied	<1	-	1	-
Average 1-5	**4.3**	**4.3**	**4.2**	**4.3**
Shopping				
5 - Very satisfied	33%	32%	36%	29%
4 - Satisfied	48	40	52	45
3 - Neither/neutral	16	25	8	23
2 - Dissatisfied	3	4	3	2
1 - Very dissatisfied	<1	-	1	<1
Average 1-5	**4.1**	**4.0**	**4.2**	**4.0**
Visitor information services				
5 - Very satisfied	40%	52%	37%	38%
4 - Satisfied	36	33	24	47
3 - Neither/neutral	21	14	33	14
2 - Dissatisfied	3	1	6	<1
1 - Very dissatisfied	<1	<1	-	1
Average 1-5	**4.1**	**4.3**	**3.9**	**4.2**
Sightseeing				
5 - Very satisfied	56%	55%	56%	55%
4 - Satisfied	36	35	37	36
3 - Neither/neutral	7	10	4	9
2 - Dissatisfied	1	<1	3	-
1 - Very dissatisfied	-	-	-	-
Average 1-5	**4.5**	**4.4**	**4.5**	**4.5**

Satisfaction Ratings (con'td)
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Tours and activities				
5 - Very satisfied	45%	55%	43%	41%
4 - Satisfied	35	32	35	39
3 - Neither/neutral	16	9	19	17
2 - Dissatisfied	3	4	4	3
1 - Very dissatisfied	-	-	-	-
Average 1-5	**4.2**	**4.4**	**4.2**	**4.2**
Wildlife viewing				
5 - Very satisfied	47%	46%	47%	48%
4 - Satisfied	34	36	35	31
3 - Neither/neutral	14	14	11	17
2 - Dissatisfied	4	3	6	4
1 - Very dissatisfied	<1	<1	<1	-
Average 1-5	**4.2**	**4.2**	**4.2**	**4.2**
Transportation within Alaska				
5 - Very satisfied	36%	38%	34%	36%
4 - Satisfied	49	52	51	47
3 - Neither/neutral	12	10	11	13
2 - Dissatisfied	2	1	2	3
1 - Very dissatisfied	1	-	1	1
Average 1-5	**4.2**	**4.3**	**4.2**	**4.1**
Friendliness of residents				
5 - Very satisfied	67%	67%	65%	70%
4 - Satisfied	28	29	32	23
3 - Neither/neutral	4	3	3	5
2 - Dissatisfied	1	<1	1	1
1 - Very dissatisfied	-	-	-	-
Average 1-5	**4.6**	**4.6**	**4.6**	**4.6**
Value for the money				
5 - Very satisfied	33%	33%	39%	28%
4 - Satisfied	44	41	39	49
3 - Neither/neutral	17	17	18	17
2 - Dissatisfied	5	4	5	5
1 - Very dissatisfied	1	-	<1	1
Average 1-5	**4.0**	**4.1**	**4.1**	**4.0**

Note: "Don't know/Does not apply" responses have been removed from the base for each question.

Recommending Alaska

Three out of four visitors surveyed said they were very likely to recommend Alaska as a vacation destination to their friends and family, while another 20 percent were likely. Less than 2 percent said they were unlikely to do so. VFRs were slightly more likely to say they would recommend Alaska.

Likelihood of recommending Alaska is just slightly lower among fall/winter visitors when compared to summer visitors, 79 percent of whom said they were very likely to recommend Alaska.

Likelihood of Recommending Alaska to Friends/Family
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Very likely	73%	71%	77%	69%
Likely	20	27	17	22
Unlikely	1	<1	2	2
Very unlikely	<1	<1	1	<1
Don't know	5	1	4	7

Returning to Alaska

Four out of five visitors said they were very likely to return to Alaska in the next five years. Another 14 percent said they were likely. The likelihood was higher among VFRs (82 percent) and business travelers (80 percent) when compared to vacation/pleasure visitors (62 percent).

The rate of those very likely to return to Alaska (79 percent) closely corresponds to the actual 2006-07 repeat rate of 75 percent (see following page).

Likelihood of Returning to Alaska in Next Five Years
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Very likely	79%	62%	82%	80%
Likely	14	21	11	15
Unlikely	2	7	3	1
Very unlikely	1	3	1	1
Don't know	4	7	4	4

Three-quarters of Alaska visitors in fall/winter 2006-07 were repeat visitors to the state. That figure is highest among VFRs at 82 percent, followed by business travelers at 74 percent. Half of vacation/pleasure visitors had been to Alaska before. The overall fall/winter repeat rate of 75 percent is significantly higher than the summer repeat rate of 34 percent.

Repeat Alaska Travel
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
First trip to Alaska	25%	48%	18%	26%
Been to Alaska before	75	52	82	74

Repeat travelers reported an average number of 6.1 previous Alaska vacation trips, ranging from 4.1 trips among business travelers to 7.7 trips among VFRs. (Those who reported zero previous vacation trips had been to Alaska before, but for business rather than vacation.) The average number of previous trips is much higher than in the summer (3.4 average trips), likely due to the higher proportion of VFRs in the fall/winter market.

Number of Previous Vacation Trips
Base: Repeat Visitors
By Trip Purpose

	Repeat Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
None[1]	7%	-%	1%	16%
One	26	32	20	32
Two	14	15	13	15
Three to five	22	25	25	17
Six to ten	16	13	22	10
Eleven or more	15	15	19	9
Average number of trips	**6.1**	**5.7**	**7.7**	**4.1**

[1] Those who said "none" had been to Alaska before, but not for vacation.

Nine out of ten repeat visitors reported entering and exiting the state via airplane on their previous trip. Vacation/pleasure visitors were more likely to report having traveled via cruise ship and highway.

Entry/Exit Modes Used on Previous Trip
Base: Repeat Visitors
By Trip Purpose

	Repeat Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Air	92%	72%	93%	95%
Cruise ship	4	11	4	3
Highway	4	20	3	2
State ferry	1	2	1	1
Other	<1	-	<1	<1

Trip Planning Timeline

Fall/winter visitors decided to come on their trip an average of 2.6 months ahead of time, and booked their major travel arrangements an average of 1.6 months ahead of time. Over three-quarters of visitors made their trip decision within three months of traveling, while 89 percent booked their travel in that same time frame. Fall/winter travelers have much shorter lead times than summer travelers, who made their trip decision an average of 8.1 months ahead of time, and booked their travel an average of 5.4 months ahead of time.

Business travelers showed the shortest average lead times for both trip decision (2.1 months) and booking (1 month). Vacation/pleasure travelers showed longer lead times for trip decision (4.1 months) and booking (2.8 months).

Trend data on trip planning timelines over the years of AVSP can be found in the Trends section.

Trip Planning Timeline
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
How far in advance did you decide to come on this trip to Alaska?				
Less than one month	37%	19%	31%	47%
One to three months	41	39	45	37
Four to six months	14	26	15	9
Seven to 11 months	2	3	2	3
One year or more	6	12	7	3
Don't know	<1	<1	<1	1
Average # of months	**2.6**	**4.1**	**2.8**	**2.1**
How far in advance did you book your major travel arrangements?				
Less than one month	48%	29%	41%	60%
One to three months	41	43	47	36
Four to six months	8	18	10	3
Seven to 11 months	1	5	<1	<1
One year or more	1	3	1	-
Don't know	1	1	<1	1
Average # of months	**1.6**	**2.8**	**1.8**	**1.0**

Internet Usage

Two-thirds of fall/winter visitors used the Internet to plan their trip, including 57 percent who booked at least one component of their trip online. Both usage and booking numbers were highest among VFRs, at 77 percent (usage) and 69 percent (booking). Fall/winter Internet usage matched summer Internet usage (67 percent compared to 68 percent) but online booking was up from 42 percent to 57 percent. This can be explained by the lack of package travelers in the fall/winter, many of whom do not book over the Internet.

Internet Usage[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Used Internet	67%	64%	77%	59%
Research only	10	16	8	11
Research and book	57	48	69	48
Did not use Internet	31	35	22	39
Don't know	2	1	1	2

[1] Based to intercept respondents only.

Among all fall/winter visitors, 54 percent booked their airfare online. Lodging was booked online by 17 percent, and vehicle rental by 10 percent. VFRs were particularly likely to book airfare online, while vacation/pleasure and business travelers were more likely to book lodging and vehicle rentals online. Booking airfare online rose from 30 percent of the summer market to 54 percent of the fall/winter market.

Trip Components Booked over Internet[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Airfare	54%	39%	66%	46%
Lodging	17	23	8	25
Vehicle rental	10	11	6	14
Tours	1	7	1	<1
Ferry	1	3	1	<1

[1] Based to intercept respondents only.

Travel Agent Usage

One in five fall/winter visitors reported booking at least some portion of their trip through a travel agent. The figure was higher among vacation/pleasure (33 percent) and business (28 percent) travelers. Travel agent usage in the fall/winter was much lower than in the summer, when 52 percent of visitors reported booking through a travel agent.

Travel Agent Usage[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Booked through travel agent	21%	33%	10%	28%
Did not book through travel agent	76	65	88	68
Don't know	3	2	3	4

[1] Based to intercept respondents only.

Usage of State of Alaska Information Sources

Visitors were asked if they had used the official State of Alaska travel website, www.travelalaska.com. Eight percent said they had, with this figure highest among vacation/pleasure visitors (15 percent). Just 3 percent said they had received the Official Alaska State Vacation Planner, with vacation/pleasure visitors again showing higher usage (9 percent). Usage of www.travelalaska.com was higher among summer vacation/pleasure visitors (25 percent versus 15 percent among fall/winter), and they were also more likely than fall/winter vacation/pleasure visitors to have received the Planner (16 percent versus 9 percent among fall/winter).

Usage of State of Alaska Information Sources[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Did you visit the official State of Alaska travel website? (www.travelalaska.com)				
Yes	8%	15%	9%	4%
No	87	77	86	91
Don't know	4	7	4	2
Did you receive the Official Alaska State Vacation Planner?				
Yes	3%	9%	4%	1%
No	94	88	94	97
Don't know	2	3	2	2

[1] Based to intercept respondents only.

Usage of Other Information Sources

After visitors were asked about their usage of the Internet, travel agents, and State of Alaska sources, they were shown a list of additional sources and asked to identify which they had used in planning their Alaska trip. Fall/winter visitors tended mention very few sources other than prior experience (64 percent) and friends/family (47 percent). Vacation/pleasure visitors tended to do more research than other visitors, with higher usage of brochures, television, travel guides/books, and magazines, among others.

Other Information Sources[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Prior experience	64%	41%	73%	62%
Friends/family	47	34	83	17
Brochures (net)	7	11	5	8
Community brochures	2	2	1	3
Ferry brochure/schedule	2	4	3	<1
Television	5	7	4	5
Travel guide/book	5	14	3	3
Milepost	4	1	5	4
Magazine	4	10	4	3
Hotel/lodge	3	8	2	3
AAA	3	5	2	4
Club/organization	3	6	1	4
Newspaper	3	3	2	2
Convention & Visitors Bureau(s)	2	7	2	2
Cruise line/tour company	2	3	1	2
Library	1	2	1	1
North to Alaska guide	<1	-	1	-
Travel/recreation exhibits	<1	1	<1	-
Other	1	1	1	1
None	14	19	4	22
Don't know	1	1	<1	1

[1] Based to intercept respondents only.

Origin

Fall/winter visitors were much more likely to be from Western US states than any other region, accounting for 57 percent of all visitors. This is triple the percentage from the South, the next most-common region of origin (18 percent). Visitors were even less likely to be from the Midwest (10 percent) or the East (6 percent). Canada accounted for 4 percent of visitors, while another 4 percent were from other international countries.

VFRs and business travelers were nearly twice as likely to be from the West when compared to vacation/pleasure travelers. Vacation/pleasure travelers were much more likely to be from Canada or other international countries, particularly Asian countries.

An analysis of each US regional market, Canada, and international visitors is provided in the Summary Profiles section. Trends in origin data are provided in the Trends section.

Origin
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
United States	**92%**	**71%**	**95%**	**95%**
Western US	**57%**	**35%**	**59%**	**60%**
Washington	23	11	24	24
California	11	12	11	10
Oregon	6	1	5	9
Colorado	4	2	3	4
Arizona	3	2	4	3
Idaho	3	2	4	2
Southern US	**18%**	**13%**	**14%**	**23%**
Texas	5	4	4	7
Florida	3	2	2	3
Midwestern US	**10%**	**17%**	**11%**	**7%**
Ohio	2	5	2	2
Illinois	2	8	2	1
Eastern US	**6%**	**5%**	**8%**	**5%**
New York	2	3	4	1
Pennsylvania	1	1	2	<1
Canada	**4%**	**13%**	**3%**	**3%**
Other International	**4%**	**16%**	**3%**	**2%**
Asia	2	13	1	1
Europe	1	2	<1	1
Australia/New Zealand	<1	1	1	-

Party Size

Fall/winter visitors reported an average party size of 1.5. (Party size was defined as those traveling in their immediate party, sharing expenses such as food, lodging and transportation.) The most common party size was one, accounting for 66 percent of all parties. Party size varied significantly by trip purpose, as might be expected. Business travelers were the most likely to travel solo, followed by VFRs, then vacation/pleasure. Vacation/pleasure visitors were the most likely to travel in pairs and parties of three or more.

Party size among fall/winter travelers is very different from the summer market, when 60 percent of the market travel in pairs, and the average party size is 2.4 people. Party size data over the years is provided in the Trends section.

Party Size[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
One	66%	30%	60%	81%
Two	25	43	32	15
Three	5	13	6	2
Four	2	9	2	1
Five or more	1	5	1	1
Average party size	**1.5**	**2.2**	**1.5**	**1.3**

[1] Based to intercept respondents only.

Age and Gender

Overall, fall/winter visitors were slightly more likely to be male. The vacation/pleasure market was more evenly split; VFRs were more heavily female; and business travelers were more heavily male. The average age reported was 45 years, slightly younger than the summer average of 52 years. Trends in age and gender data can be found in the Trends section.

Age and Gender
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Gender				
Male	56%	52%	43%	72%
Female	44	48	57	28
Age				
Under 18	4%	8%	6%	1%
18 to 24	7	6	10	4
25 to 34	15	15	16	14
35 to 44	19	17	14	25
45 to 54	26	29	18	32
55 to 64	20	20	21	20
65 and older	9	6	15	3
Average age	**44.7**	**43.6**	**45.0**	**45.0**

Note: Age and gender data reflect the entire traveling party, not just the respondent.

Household Characteristics

One-third of fall/winter visitors reported children living in their household. The number is slightly higher among business visitors (40 percent). Fall/winter visitors were more likely than summer visitors to report children in the household (33 versus 25 percent).

Children Living In Household
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Children living in household	33%	28%	26%	40%
No children in household	66	69	73	59
Don't know	1	2	1	<1

One out of five fall/winter visitors were retired or semi-retired, with the number highest among VFRs (30 percent) and lowest among business travelers (10 percent). The rate of retirees is much higher among the summer market (39 percent) when compared to the fall/winter market (20 percent).

Retired or Semi-Retired
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Retired or semi-retired	20%	21%	30%	10%
Not retired	79	77	69	90
Don't know	1	2	1	<1

About six in ten Alaska visitors in fall/winter had graduated from college, including one-quarter who attained a higher degree. Business visitors showed higher levels of educational achievement. The college graduation rate (59 percent) among fall/winter visitors is identical to that of summer visitors.

Education
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Some high school	1%	<1%	1%	<1%
High school diploma/GED	11	15	15	6
Associate/technical degree	10	8	10	10
Some college	19	19	26	13
Graduated from college	35	38	31	38
Master's/Doctorate	24	19	16	32
Don't know	1	1	1	<1

Fall/winter visitors reported an average income of $103,000 – identical to the summer average. Business travelers reported the highest average at $123,000, followed by vacation/pleasure visitors, then VFRs. Trends in income levels can be found in the Trends section.

Household Income
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Less than $25,000	4%	5%	6%	2%
$25,000 to $50,000	13	15	19	6
$50,000 to $75,000	19	20	22	17
$75,000 to $100,000	15	11	15	17
$100,000 to $125,000	14	15	10	16
$125,000 to $150,000	9	4	7	11
$150,000 to $200,000	7	7	4	9
Over $200,000	8	5	3	14
Refused	12	17	14	8
Average income	**$103,000**	**$92,000**	**$82,000**	**$123,000**

Expenditures Per Person

On average, fall/winter visitors spent $760 per person while in Alaska, or $84 per night. Average expenditures were higher among business ($922) and vacation/pleasure visitors ($854) when compared to VFRs ($559).

Fall/winter visitors spent an average of $174 per person less than summer visitors ($760 compared to $934 per person). Fall/winter vacation/pleasure visitors spent an average of $81 less than summer vacation/pleasure visitors ($854 compared to $935 per person).

It is important to note that this survey question captured in-state expenditures only, excluding the cost of transportation to and from the state (such as airfare and ferry tickets). (Visitors that traveled onboard the Alaska Marine Highway spent an average of $615 per person for their ferry tickets. This includes expenditures on ferry travel to and from Alaska, as well as between communities within the state.)

Visitor Expenditures in Alaska, Per Person, Overall[1]
Excluding Transportation to/from Alaska
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Less than $500	61%	58%	74%	49%
$501 - $1,000	19	18	12	25
$1,001 - $2,500	13	14	9	17
$2,501 - $5,000	3	3	1	3
Over $5,000	1	3	1	1
Don't know	4	5	4	4
Average per person, per trip	**$760**	**$854**	**$559**	**$922**
Average per person, per night	**$84**	**$126**	**$52**	**$112**

[1] Based to intercept respondents only.
Note: Spending on airfare and ferry tickets to enter and exit the state is excluded.

The following table provides information on average spending by category. Visitors spent the highest amount on lodging, averaging $251 per person. Food/beverage was the second-largest category, at $191 per person. On average, visitors spent $129 per person on retail purchases (including gifts, souvenirs, and clothing).

Spending patterns were different for each trip purpose market. Vacation/pleasure visitors reported higher spending on cars/fuel/transportation, packages, and tours/activities/entertainment. Business visitors tended to spend more money on lodging and food/beverage. VFRs reported higher spending on transportation and retail.

Averages by category do not add up exactly to total spending estimates. This is because each category is based to slightly different samples, due to "don't know" responses.

Visitor Expenditures in Alaska, Per Person, by Category[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Lodging	$251	$197	$70	$434
Food/beverage	191	132	157	235
Gifts/souvenirs/clothing	129	141	182	75
Cars/fuel/transportation	114	223	45	159
Packages	64	423	*	*
Tours/activities/entertainment	29	43	33	24
Other	11	14	10	11

[1] Based to intercept respondents only.
* Sample size too small for analysis.
Note: Spending on airfare and ferry tickets to enter and exit the state is excluded.

Total Expenditures

Visitors' out-of-pocket expenditures totaled $190 million, excluding transportation costs to travel to and from Alaska. Business visitors' spending was the largest among the trip purpose markets ($105 million). Out-of-pocket expenditures among VFRs totaled $59 million; and vacation/pleasure visitors represented $25 million in in-state spending.

Total Visitor Expenditures in Alaska
in Millions of Dollars
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Total in-state spending	$189.6	$25.4	$59.0	$105.4

Note: Spending on ferry tickets to enter and exit the state is excluded.

When spending by category is extrapolated to the entire fall/winter market, the lodging category generated the largest total spending, at $63 million, followed by food/beverage at $48 million, and retail at $32 million. Relative total spending by trip purpose market reflects the differences in volume and average spending.

Total Visitor Expenditures in Alaska, by Category
in Millions of Dollars
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business
Lodging	$62.6	$5.9	$7.4	$49.6
Food/beverage	47.7	3.9	16.6	26.9
Gifts/souvenirs/clothing	32.2	4.2	19.2	8.6
Cars/fuel/transportation	28.4	6.6	4.7	18.2
Package	16.0	12.6	*	*
Tours/activities/entertainment	7.2	1.3	3.5	2.7
Other	2.7	0.4	1.1	1.3

* Sample size too small for analysis.
Note: Spending on airfare and ferry tickets to enter and exit the state is excluded.

Full-Year Expenditures

Combining results of the Summer 2006 and Fall/Winter 2006-07 study periods, total *annual* expenditures are estimated at $1.7 billion. Cruise packages are not included in the spending figures. Based on the average per person cruise price of $1,897 and the total volume of 958,900, the cruise market spent approximately $1.8 billion on cruises and cruise/tour packages in 2006-07.

Total Full-Year Visitor Expenditures in Alaska
in Millions of Dollars

	Summer 2006	Fall/Winter 2006-07	Full-Year 2006-07
Total in-state spending	$1,524	$190	$1,714

Note: Spending by cruise visitors excludes the price of their cruise or cruise/tour package. Spending on airfare and ferry tickets to enter and exit the state is excluded.

Section V: Visitor Trends

Introduction

This section shows visitor survey data from Fall/Winter 2006-2007 compared to survey data from the two previous AVSP generations: 2000-2001 and 1993-1994. Trends are measurable in a number of areas: trip purpose, mode of entry, length of stay, regions visited, satisfaction, repeat travel, trip planning, demographics, and expenditures.

Certain questions and subject areas were difficult to compare across generations, due to differences in survey methodology, question wording, rating scales, and reporting methods. For example, in 2000 age ranges were expressed in terms of full decades; in 1993 and 2006, age ranges followed a mid-decade pattern (25-34, 35-44, etc.). Trip planning ranges also differ across generations – for example, 1-3 and 4-6 months versus 2-3, 4-5, etc. Satisfaction rating scales changed from 1-7 in 1993 and 2000 to 1-5 in 2006. Certain average statistics were not reported in 2000, including length of stay, income, age, party size, and number of months spent planning the trip. Trip planning sources were collected in different ways each generation, making comparisons of certain sources difficult.

While these differences present challenges to interpreting some of the data through the years, there is a significant amount of data that is directly comparable, and that show interesting trends. In addition, even when differences in scales or reporting methods exist, it is still valuable to look at the data side-by-side.

The trend data presented in this section is derived from the following sources, all prepared for the State of Alaska Department of Community and Economic Development:

Alaska Visitor Arrivals and Profile, Fall/Winter 2000-01, prepared by Northern Economics

Alaska Visitor Expenditures and Opinions, Fall/Winter 2000-01, prepared by Northern Economics

Alaska Visitor Arrivals, Fall/Winter 1993-1994, prepared by McDowell Group

Alaska Visitor Patterns, Opinions, and Planning, Fall/Winter 1993-1994, prepared by McDowell Group

Alaska Visitor Expenditures, Fall/Winter 1993-1994, prepared by McDowell Group

The proportion of the fall/winter visitor market traveling for vacation or pleasure has decreased slightly over the years of AVSP, from 15 percent in 1993-94 to 12 percent in 2006-07. The VFR (visiting friends/relatives) market has increased over the same time period, from 22 to 42 percent of the market. The proportion traveling for business has decreased, from 50 to 39 percent of the market; those traveling for business/pleasure have likewise decreased, from 10 to 7 percent. A possible factor in the growth in the proportion of VFRs is the increase in Alaska's population, which grew by 12 percent (73,000 residents) between 1993 and 2006.[1]

Trip Purpose
Visitor Trends

	1993-94	2000-01	2006-07
Vacation/pleasure	15%	18%	12%
Visiting friends or relatives	22	26	42
Business only	50	44	39
Business and pleasure	10	12	7

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: The 1993 sample included an additional 3 percent who were seasonal workers.

The percentage of fall/winter visitors entering the state by each transportation mode has stayed steady over the years of AVSP.

Mode of Entry
Visitor Trends

	1993-94	2000-01	2006-07
Air	93%	95%	96%
Highway	5	4	4
Ferry	2	1	1

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

[1] US Census Bureau.

Length of Stay and Regions Visited

The average length of stay increased slightly between 1993-94 and 2006-07, from 8.2 to 8.8 nights. A more significant change is detectable in terms of ranges: the proportion staying seven nights or less grew from 55 percent to 69 percent, while those staying eight to 14 nights fell from 29 to 17 percent.

Length of Stay in Alaska
Visitor Trends

	1993-94	2000-01	2006-07
Seven nights or less	55%	53%	69%
Eight to 14 nights	29	25	17
15 or more nights	16	21	13
Average number of nights	**8.2**	**n/a**	**8.8**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: The 1993 categories were slightly different: 6 nights or less, 7-13 nights, and 14+.

The table below shows visitation to each region over the years of AVSP, revealing only slight changes between 1993-94 and 2006-07. Visitation to Anchorage fell slightly from 80 percent to 76 percent; visitation to the Interior increased slightly from 25 to 29 percent; and visitation to Southeast fell from 16 percent to 12 percent. (Note: 2000-01 regional visitation was not measured in the same way as in the other two AVSP studies.)

Regions Visited
Visitor Trends

	1993-94	2006-07
Southcentral	80%	76%
Interior/Northern	25	29
Southeast	16	12
Southwest	8	7
Denali	6	4

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.
Note: Regional categories have been modified from other areas of this report to correspond with previous AVSP methodology.

Among all trend data, satisfaction ratings are the most difficult to compare across the different years of AVSP. In addition to a change in rating scale (from 1-to-7 to 1-to-5), there were subtle differences in question wording, and a lack of reported data in some cases.

The following table shows the average rating for overall trip, compared to expectations, and value for the money. The average overall trip ratings appear to have changed little over the years. Compared to expectations ratings appear to have dropped, as is discernible in the second table, below. In 2000-01, many more visitors chose the higher ratings (24 percent at "7", and 33 percent at "6"). Only 14 percent chose the midpoint ("4"), which would logically correspond to the 2006-07 response "about what you expected" (chosen by 54 percent of respondents). While some of this may be due to an actual shift in visitors' experience, some of it may also have resulted from the change in question format. The same difference can be found in value for the money ratings.

Overall Trip Ratings
Visitor Trends

	1993-94 Scale: 1-7	2000-01 Scale: 1-7	2006-07 Scale: 1-5
Overall Alaska trip	5.7	5.8	4.5
Compared to expectations	5.4	5.6	3.6
Value for the money	4.9	5.0	3.4

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

How well did your trip to Alaska live up to what you expected from an Alaska vacation?
Visitor Trends

	2006-07
Much higher than expectations	17%
Higher than expectations	27
About what you expected	54
Below expectations	2
Far below expectations	-
Average 1-5	**3.6**
	2000-01
7-Exceeded	24%
6	33
5	28
4	14
3	2
2	<1
1-Below	<1
Average 1-7	**5.6**

In terms of value for the money, how does Alaska compare with other vacation destinations you've visited in the past five years?
Visitor Trends

	2006-07
Much better	15%
Better	21
About the same	51
Worse	12
Much worse	1
Average 1-5	**3.4**
	2000-01
7-Better	11%
6	21
5	37
4	19
3	10
2	<1
1-Worse	1
Average 1-7	**5.0**

Sources: 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

The likelihood of recommending Alaska to others appears to have shifted a little between 2000 and 2006. The percentage "very likely" to recommend was 61 percent in 2000, and 73 percent in 2006. Likelihood of returning also shifted, from 52 percent "very likely" in 2000 to 79 percent "very likely" in 2006. Again, the difference in rating scales makes it difficult to make direct comparisons.

How likely are you to recommend Alaska as a vacation destination to others?
Visitor Trends

	2006-07
Very likely	73%
Likely	20
Unlikely	1
Very unlikely	<1
Don't know	5
	2000-01
7-Very likely	61%
6	17
5	14
4	5
3	0
2	<1
1-Very unlikely	<1
Don't know	2

How likely are you to return to Alaska in the next five years?
Visitor Trends

	2006-07
Very likely	79%
Likely	14
Unlikely	2
Very unlikely	1
Don't know	4
	2000-01
7-Very likely	52%
6	11
5	11
4	6
3	3
2	4
1-Very unlikely	6
Don't know	8

Sources: 2000 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: In 2000, the question regarding likelihood of returning specified "for vacation."

Previous Alaska Travel

The rate of repeat travel to Alaska appears to have increased since the last AVSP survey, from 57 percent to 75 percent of visitors having been to Alaska before. This is likely due to the increased percentage of VFRs in relation to other types of visitors. (In 1993, visitors were asked only about their Alaska travel in the previous five years.)

Previous Alaska Travel
Visitor Trends

	2000-01	2006-07
First trip to Alaska	44%	25%
Been to Alaska before	57	75

Sources: 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

All three AVSP generations included two questions on trip planning timing: when the visitor made the decision to travel, and when they booked their trip. The question was modified slightly in 2006, as seen in the table below. Ranges were reported differently each year, making it difficult to compare across the years. Average figures appear to show a decrease in the timelines for both trip decision (from 4.5 to 2.6 months) and trip booking (from 2.4 to 1.6 months).

Trip Planning Timeline
Visitor Trends

	2006-07 Trip Decision	2006-07 Trip Booking
How far in advance did you decide to come on this trip to Alaska? How far in advance did you book your major travel arrangements?		
Less than one month	37%	48%
One to three months	41	41
Four to six months	14	8
Seven to 11 months	2	1
One year or more	6	1
Don't know	<1	1
Average # of months	**2.6**	**1.6**
	2000-01	**2000-01**
How long before the trip did you decide what season and year you would make this trip? How long before the trip did you make your travel arrangements?		
Less than one month	23%	40%
1-2 months	21	36
3-4 months	24	13
5-6 months	13	5
7-11 months	7	4
1-2 years	6	4
More than 2 years	1	0
Don't know	5	2
Average # of months	**n/a**	**n/a**
	1993-94	**1993-94**
Less than one month	40%	62%
2-3 months	28	24
4-5 months	6	3
6-7 months	9	5
8-9 months	4	3
10-11 months	1	0
1 year or more	10	2
Don't know	n/a	n/a
Average # of months	**4.5**	**2.4**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

The rates of usage for various types of information sources is somewhat difficult to track because of changes in the way the question was asked, and how the sources were identified. The following table shows the few sources that are comparable between AVSP generations.

The State of Alaska Official Vacation Planner was *used* by 9 percent of visitors in 1993 and 19 percent in 2000; it was *received* by 3 percent in 2006. This drop is at least in part due to an increase in Internet usage, including the State travel website www.travelalaska.com. Travel agents were used by 26 percent of visitors in 1993 and 36 percent in 2000; 21 percent of visitors *booked* through travel agents in 2006. The usage of friends and relatives as information sources appears to have increased, from 31 percent in 1993 to 47 percent in 2006.

Trip Information Sources
Visitor Trends

	1993-94	2000-01	2006-07
State of Alaska Official Vacation Planner	9% Used	19% Used	3% Received
Travel agent	26% Used	36% Used	21% Booked
Travel guide/book	n/a	22%	5%
Friends/relatives	31%	53%	47%
Milepost	n/a	9%	4%

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

The fall/winter market appears to have changed very little since 1993 in terms of visitor origin, with similar percentages over the years for US visitors, each US region, Canada, and other international.

Origin
Visitor Trends

	1993-94	2000-01	2006-7
United States	88%	91%	92%
Western US	57	55	57
Southern US	18	15	18
Midwestern US	7	11	10
Eastern US	6	10	6
Canada	5	5	4
Other International	5	4	4

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

Average party size grew slightly from 1.4 people in 1993 to 1.5 people in 2006. Gender distribution has shifted to include more women – from 34 percent of visitors in 1993, to 41 percent in 2000, to 44 percent in 2006.

Party Size
Visitor Trends

	1993-94	2000-01	2006-07
One	71%	76%	66%
Two	20	19	25
Three	5	3	5
Four	2	2	2
Five or more	2	0	1
Average party size	**1.4**	**n/a**	**1.5**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: Party size was defined as those traveling in the respondent's immediate party, sharing expenses.

Gender
Visitor Trends

	1993-94	2000-01	2006-07
Male	66%	59%	56%
Female	34	41	44

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

The average age of fall/winter visitors increased from 39 to 45 years old. Those 55 and older increased their share from 19 to 29 percent, while those in the 35 to 44 age group dropped from 27 to 19 percent. (Age data in 2001 was reported by decade, and was not reported in terms of average, making it difficult to compare with 1993 and 2006 data.)

Age, 1993 & 2006
Visitor Trends

	1993	2006
Under 18	8%	4%
18 to 24	4	7
25 to 34	16	15
35 to 44	27	19
45 to 54	25	26
55 to 64	11	20
65 and older	8	9
Average age	**39.0**	**44.7**

Age, 2001
Visitor Trends

	2001
Under 21	7%
21-30	19
31-40	28
41-50	21
51-60	15
61 and older	11
Average age	**n/a**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

The education levels of fall/winter visitors has changed only minimally since 1993: those holding advanced degrees have fallen from 34 to 24 percent of the market. (Education data was not reported in 2001.)

Education
Visitor Trends

	1993-94	2006-07
Some high school	2%	1%
High school diploma/GED	12	11
Associate/technical degree	n/a	10
Some college	21	19
Graduated from college	32	35
Master's/Doctorate	34	24

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.)

Visitors' income levels increased by 50 percent between 1993 and 2006. The difference in refusal rate on income between 2001 (26 percent) and 2006 (12 percent) makes it difficult to compare the two years.

Household Income
Visitor Trends

	1993-94	2000-01	2006-07
Less than $25,000	9%	7%	4%
$25,000 to $50,000	27	15	13
$50,000 to $75,000	26	19	19
$75,000 to $100,000	17	15	15
$100,000 and over	21	18	38
Refused	n/a	26	12
Average income	**$69,000**	**n/a**	**$103,000**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2000 data from AVSP IV (conducted by Northern Economics, Inc.).

Average visitor expenditures grew 60 percent between the 1993-94 fall/winter season, when visitors spent an average of $476 per person, and the 2006-07 fall/winter season, when visitors spent an average of $760 per person. The largest expenditure category in both study periods was lodging ($169 in 1993-94 and $251 in 2006-07). When visitor spending data is extrapolated to the entire market, overall spending reached nearly $190 million in 2006-07, more than twice the total spending in 1993-94.

Visitor Expenditures in Alaska, Per Person, Overall
Visitor Trends

	1993	2001[1]	2006
Per person, per trip	$476	$1,284	$760

[1] 2001 data likely affected by small sample size and low response rate.
Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

Visitor Expenditures by Category, Per Person
Visitor Trends

1993		2001[1]		2006	
Lodging	$169	Lodging	$328	Lodging	$251
Food/beverage	112	Food/beverage	173	Food/beverage	191
Transportation	86	Transportation	144	Transportation	114
Tours/recreation	16	Recreation	109	Tours/recreation	29
Gifts/souvenirs	36	Gifts/souvenirs	80	Gifts/souvenirs/ clothing	129
Clothing	11	Clothing	60		
Personal	21	Personal	30	Package	64
Other	25	Other	88	Other	11
		Alaska Native Arts & Crafts	271		

[1] 2001 data likely affected by small sample size and low response rate.
Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

Total Visitor Expenditures in Alaska
in Millions of Dollars
By Transportation Market

	1993	2001[1]	2006
Total in-state spending	$87.4	$326.8	$189.6

[1] 2001 data likely affected by small sample size and low response rate.
Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

It is important to view these trends in light of changes in methodology, survey question format, and response rate. In 2006-07, visitors were asked to estimate what their travel party spent on their entire trip, excluding transportation to and from Alaska. They were then asked to inventory spending by category in each community. Expenditure estimates were then divided by the number of people in each travel party.

In 1993-94 and 2000-01, visitors were asked to record their expenditures in a diary throughout their trip. In 1993-94, expenditures were recorded only for the individual completing the diary. In 2000-01, each person completing the diary was asked to record expenditures for everyone in their traveling party. An additional difference is the way that Alaska Marine Highway expenses were recorded. In 2006-07, the data was captured in a separate survey question. In prior years, this information was captured in the diary.

Finally, response rates for 2000-01 were significantly lower than in 1993-94 or 2006-07. In 1993-94, the Visitor Expenditure Survey response rate was 52 percent; it dropped to 17 percent in 2001 (for a total sample size of 323). In 2006-07, 96 percent of the intercept respondents answered the statewide expenditure questions (for a total sample size of 1,012). The high response rate and large sample for 2006-07 lends confidence to the accuracy of the spending data in comparison to prior years.

Section VI: Summary Profiles

Introduction

This section presents results of the visitor survey broken into four "Summary Profiles," representing 19 different sub-groups. Results for each profile have been consolidated into nine tables, each table reflecting a chapter in the *Visitor Profile* section.

The following table shows how the Summary Profiles and their respective sub-groups are presented. Sub-groups and their definitions were determined in consultation with the State of Alaska and the Alaska Travel Industry Association.

Selected Summary Profiles

Profile	Sub-Groups
Destination	Anchorage, Fairbanks, Juneau, Ketchikan, Palmer/Wasilla, Sitka, Girdwood, Seward, Kenai/Soldotna, Southwest, Far North
US Regions	Western US, Midwest US, Southern US, Eastern US
International	Canada, Other International
Highway/Ferry and Package	Highway/ferry, package

Summary Profile: Destinations

Visitors to the nine communities with sample sizes over 50, plus visitors to the Southwest and Far North regions, are profiled in this chapter. Definitions for each destination and sample sizes are provided in the table below.

Market Definition and Sample Size: Destinations

Market	Definition	Sample Size	Maximum Margin of Error
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	562	±4.1%
Fairbanks	Visited Fairbanks or North Pole, day and/or overnight	382	5.0
Juneau	Visited Juneau or Douglas, day and/or overnight	239	6.3
Ketchikan	Visited Ketchikan, day and/or overnight	161	7.7
Palmer/Wasilla	Visited Palmer or Wasilla, day and/or overnight	107	9.5
Sitka	Visited Sitka, day and/or overnight	80	10.9
Girdwood	Visited Girdwood, day and/or overnight	74	11.4
Seward	Visited Seward, day and/or overnight	70	11.7
Kenai/ Soldotna	Visited Kenai or Soldotna, day and/or overnight	59	12.8
Southwest	Visited any community in the Southwest region, day and/or overnight	54	13.3
Far North	Visited any community in the Far North region, day and/or overnight	41	15.3

There were many important differences between visitors to various communities.

- Seward and Girdwood attracted the largest percentages of vacation/pleasure visitors, while Palmer/Wasilla and Kenai/Soldotna attracted the largest percentages of VFRs. Juneau, Southwest, and Far North attracted higher percentages of business travelers.
- Palmer/Wasilla and Fairbanks visitors often used rental vehicles to travel within the state. Not surprisingly, Juneau and Fairbanks visitors were much more likely to travel by air.
- Southwest visitors reported the longest average trip length (14.8 nights), followed closely by Far North (14.7 nights) and Ketchikan (11.9 nights). Girdwood and Seward visitors reported the shortest average trip length at 7.6 nights.
- While Anchorage visitors tended to stay only in the Southcentral region, visitors to other regions often visited Southcentral as well: 50 percent of Interior visitors, 32 percent of Juneau visitors, 69 percent of Southwest visitors, and 68 percent of Far North visitors.

- Juneau and Fairbanks visitors were more likely than other visitors to stay in hotels/motels. Palmer/Wasilla and Ketchikan visitors were more likely to stay in private homes.
- Corresponding to trip purpose figures, Ketchikan and Palmer/Wasilla visitors were more likely to participate in visiting friends and family, and Juneau residents were more likely to do business. Sitka visitors reported high rates of hiking and visiting museums, while Fairbanks visitors reported high rates of Northern Lights viewing.
- Activity data is also presented at the community level, for those communities with large enough sample sizes. Results closely match statewide activity data.
- When asked how their trip compared to expectations, visitors to Seward, Southwest and Far North gave the highest ratings. When asked about the value for the money, visitors to Girdwood and Kenai/Soldotna gave the highest ratings.
- When asked to rate their overall trip, Sitka visitors gave the most "very satisfied" ratings, followed by Fairbanks and Kenai/Soldotna. Lower numbers of "very satisfied" ratings were given by visitors to Southwest and Juneau.
- Seward and Far North visitors were the most likely to say they would recommend Alaska to others, followed by Girdwood visitors.
- Ketchikan visitors were the most likely to be repeat visitors to Alaska, followed by Juneau and Sitka. Seward and Fairbanks attracted higher rates of first-time Alaska visitors.
- When asked how they had traveled to Alaska on their previous trip, Seward visitors were the most likely to have traveled via cruise ship, followed by Girdwood and Kenai/Soldotna visitors.
- Southwest visitors reported the longest average lead time for making the decision to travel to Alaska, followed by Palmer/Wasilla visitors. Girdwood visitors reported the longest average lead time for booking their Alaska travel, followed by Palmer/Wasilla visitors. The shortest average lead time for booking was reported by Ketchikan visitors.
- Sitka and Ketchikan had the highest proportions of visitors from the Western US, while Girdwood and Seward had the lowest. Girdwood drew more often from the South and Midwest.
- The destinations drawing higher percentages of international (besides Canada) visitors were Fairbanks and Southwest. Drawing more often from Canada were Juneau, Girdwood, and Far North.
- Ketchikan, Southwest and Far North drew the highest proportions of male travelers, while Palmer, Sitka and Seward drew the lowest.
- The highest average income was among Far North visitors, at $135,000. They are followed by Southwest visitors at $116,000. Lower average incomes were reported by Palmer/Wasilla and Sitka visitors.
- Statewide expenditures and expenditures in communities are reported for six communities with large enough sample sizes for analysis. Visitors to Fairbanks reported the highest average statewide spending, at $931 per person, per trip. They also reported the highest community spending, at $597 per person spent in Fairbanks.

Trip Purpose & Packages
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Trip Purpose						
Visiting friends/rel.	42%	41%	33%	27%	42%	56%
Business only	39	42	45	52	32	26
Vacation/pleasure	12	10	15	10	15	15
Business/pleasure	7	7	6	11	10	3
Purchased multi-day package						
Yes	4%	4%	7%	3%	5%	2%

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Trip Purpose						
Visiting friends/rel.	35%	45%	43%	47%	30%	27%
Business only	41	23	21	34	56	54
Vacation/pleasure	13	22	26	12	8	5
Business/pleasure	11	11	10	7	6	13
Purchased multi-day package						
Yes	11%	11%	11%	1%	7%	9%

Transportation Modes
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Mode of Entry into Alaska						
Air	96%	97%	98%	92%	90%	95%
Highway	4	2	2	4	1	4
Ferry	1	<1	<1	4	9	1
Mode of Exit from Alaska						
Air	97%	99%	97%	93%	86%	99%
Highway	3	1	3	3	-	<1
Ferry	1	<1	<1	4	14	1
Used to Travel Between Communities[1]						
Personal vehicle	21%	20%	18%	10%	3%	47%
Rental vehicle	18	21	27	9	5	41
Air	19	17	32	34	22	6
State ferry	2	<1	<1	16	11	1
Motorcoach/bus	1	1	5	<1	<1	2
Personal RV	1	1	<1	<1	-	2
Train	1	1	3	<1	<1	2
Rental RV	<1	<1	1	<1	-	-
None of the above	42	41	23	45	64	7
Don't know/refused	1	<1	1	2	1	<1

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Mode of Entry into Alaska						
Air	94%	97%	95%	90%	99%	100%
Highway	2	3	5	9	<1	-
Ferry	4	-	<1	<1	<1	-
Mode of Exit from Alaska						
Air	92%	99%	99%	99%	100%	100%
Highway	-	<1	1	1	-	-
Ferry	8	<1	1	1	<1	<1
Used to Travel Between Communities[1]						
Personal vehicle	6%	*	*	*	*	*
Rental vehicle	5	*	*	*	*	*
Air	38	*	*	*	*	*
State ferry	12	*	*	*	*	*
Motorcoach/bus	1	*	*	*	*	*
Personal RV	-	*	*	*	*	*
Train	-	*	*	*	*	*
Rental RV	-	*	*	*	*	*
None of the above	49	*	*	*	*	*
Don't know/refused	3	*	*	*	*	*

[1] These responses are based to intercept respondents only.
* Sample size too small for analysis.

Length of Stay, Destinations & Lodging Type

Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Average length of stay in Alaska	8.8 nights	8.2 nights	8.8 nights	11.9 nights	8.8 nights	10.4 nights
Regions Visited						
Southcentral	76%	100%	50%	32%	21%	100%
Interior	28	21	100	17	14	25
Southeast	12	4	5	100	100	7
Southwest	7	6	5	6	9	<1
Far North	5	4	5	6	8	1
Destinations Visited, Top 10						
Anchorage	72%	100%	50%	31%	21%	88%
Fairbanks	22	16	100	14	13	12
Palmer/Wasilla	14	17	8	11	1	100
Girdwood/Alyeska	11	14	5	5	10	16
Kenai/Soldotna	7	9	7	3	3	12
Seward	7	10	5	8	6	12
Juneau	6	3	4	100	22	5
Portage	5	6	1	<1	-	12
Ketchikan	4	1	2	15	100	<1
Denali	4	4	6	4	2	8
Lodging Types Used						
Hotel/motel	57%	62%	69%	73%	54%	46%
Private home	44	43	34	36	49	59
Lodge	3	3	4	4	6	4
B&B	2	2	3	9	10	3
Wilderness camping	1	1	1	3	6	1
State/national campground	1	<1	-	<1	1	2
Commercial campground	<1	<1	<1	<1	1	<1
Other	9	8	10	11	10	6

Length of Stay, Destinations & Lodging Type (cont'd)

Destinations

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Average length of stay in Alaska	8.4 nights	7.6 nights	7.6 nights	9.5 nights	14.8 nights	14.7 nights
Regions Visited						
Southcentral	29%	100%	100%	100%	69%	68%
Interior	18	18	26	34	19	32
Southeast	100	6	8	6	7	8
Southwest	14	2	5	3	100	13
Far North	18	8	2	1	9	100
Destinations Visited, Top 10						
Anchorage	29%	97%	98%	88%	69%	68%
Fairbanks	18	10	15	20	17	25
Palmer/Wasilla	5	21	24	23	<1	3
Girdwood/Alyeska	9	100	36	35	3	18
Kenai/Soldotna	5	24	36	100	4	1
Seward	10	25	100	36	6	4
Juneau	41	3	7	3	6	8
Portage	-	24	22	27	-	-
Ketchikan	30	4	3	2	6	7
Denali	3	6	15	15	1	1
Lodging Types Used						
Hotel/motel	62%	64%	61%	63%	66%	65%
Private home	46	45	43	41	38	46
Lodge	4	2	5	4	1	5
B&B	11	2	7	3	11	4
Wilderness camping	11	2	3	<1	8	4
State/national campground	1	-	<1	4	3	-
Commercial campground	-	-	2	2	-	-
Other	14	11	7	13	33	39

Statewide Activities – Top 10[1]
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Visiting friends/family	49%	47%	46%	39%	61%	59%
Shopping	48	49	49	50	53	51
Business	44	49	41	61	42	30
Wildlife viewing	19	18	23	20	21	25
Hiking/nature walk	10	8	10	20	25	6
Museums	9	7	15	10	10	5
Northern Lights viewing	7	3	25	6	-	6
City/sightseeing tour	6	4	12	16	4	6
Historical/cultural attractions	6	5	5	10	6	8
Snow skiing/boarding	5	6	4	8	5	3
	Sitka	**Girdwood**	**Seward**	**Kenai/ Soldotna**	**Southwest**	**Far North**
Visiting friends/family	35%	*	*	*	*	*
Shopping	37	*	*	*	*	*
Business	35	*	*	*	*	*
Wildlife viewing	25	*	*	*	*	*
Hiking/nature walk	36	*	*	*	*	*
Museums	22	*	*	*	*	*
Northern Lights viewing	2	*	*	*	*	*
City/sightseeing tour	14	*	*	*	*	*
Historical/cultural attractions	25	*	*	*	*	*
Snow skiing/boarding	4	*	*	*	*	*

[1] Based to intercept respondents only.
* Sample size too small for analysis.

Activities in Communities[1]

	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla	Sitka
Visiting friends/relatives	37%	41%	29%	41%	43%	24%
Wildlife viewing	10	13	8	9	8	21
Cultural activities	9	15	10	13	5	28
Museums	5	13	6	7	-	19
Historical/cultural attractions	4	4	5	-	3	20
Native cultural tours/act.	3	-	1	9	-	-
Gold panning/ mine tour	-	-	-	-	2	-
Hiking/nature walk	6	5	12	12	-	28
City/sightseeing tours	3	10	13	-	2	13
Snow skiing/boarding	2	3	4	-	-	-
Fishing	1	1		3	-	7
Northern Lights viewing	1	19	2	-	2	-
Snowmobiling	1	3	-	-	5	-
Dog sledding	1	6	-	-	-	-
Shows/Alaska entertainment	1	1	-	-	-	5
Camping	<1	-	-	-	-	-
Flightseeing	-	2	1	-	-	-
Tramway/gondola	-	-	3	-	-	-
Day cruises	-	-	-	-	-	11
Other	1	13	2	-	2	-

[1] Based to intercept respondents only.

Notes: Activity participation is provided only for those communities with sample sizes of 50 or more. Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings
Destinations

	All Visitors		Anchorage		Fairbanks		Juneau		Ketchikan		Palmer/ Wasilla	
Compared to expectations												
Much higher	17%		16%		15%		10%		15%		15%	
Higher	27		28		32		44		23		23	
About as expected	54		55		49		43		59		62	
Value for the money, compared to other destinations												
Much better	15%		15%		14%		19%		2%		15%	
Better	21		22		27		22		27		22	
About the same	51		51		48		44		55		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	58%	4.5	57%	4.5	62%	4.6	52%	4.5	62%	4.6	64%	4.6
Accommodations	55	4.5	54	4.5	50	4.4	41	4.3	41	4.3	63	4.6
Restaurants	44	4.3	46	4.3	36	4.2	29	4.1	31	4.1	57	4.4
Shopping	33	4.1	35	4.2	25	3.9	30	4.0	24	3.9	42	4.3
Visitor info. services	40	4.1	39	4.1	37	4.1	33	4.2	45	4.3	64	4.5
Sightseeing	56	4.5	55	4.5	52	4.4	70	4.7	70	4.7	69	4.7
Tours and activities	45	4.2	44	4.2	36	4.1	45	4.3	59	4.5	71	4.5
Wildlife viewing	47	4.2	47	4.3	38	4.0	53	4.4	50	4.3	54	4.4
Transportation within Alaska	36	4.2	36	4.2	36	4.1	30	4.0	38	4.1	45	4.4
Friendliness of residents	67	4.6	68	4.6	67	4.6	59	4.5	63	4.6	70	4.7
Value for the money	33	4.0	34	4.1	31	3.9	30	4.0	21	3.9	43	4.2
Very likely to recommend Alaska	73%		72%		71%		72%		73%		79%	
Very likely to return to Alaska in next five years	79%		79%		77%		71%		84%		84%	

	Sitka		Girdwood		Seward		Kenai/ Soldotna		Southwest		Far North	
Compared to expectations												
Much higher	17%		22%		36%		19%		23%		28%	
Higher	37		41		31		42		4		26	
About as expected	36		36		30		37		71		43	
Value for the money, compared to other destinations												
Much better	16%		22%		18%		25%		14%		-%	
Better	18		15		16		20		36		18	
About the same	58		54		57		41		29		69	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	68%	4.7	64%	4.6	66%	4.7	66%	4.7	46%	4.4	58%	4.5
Accommodations	34	4.3	57	4.5	57	4.5	57	4.4	39	4.3	34	4.2
Restaurants	17	4.0	42	4.3	34	4.3	45	4.3	33	4.1	25	4.0
Shopping	15	3.6	39	4.2	41	4.2	41	4.2	13	3.7	30	3.7
Visitor info. services	56	4.2	45	4.3	44	4.2	40	4.2	34	4.0	56	4.4
Sightseeing	74	4.7	59	4.6	56	4.5	54	4.5	55	4.3	74	4.7
Tours and activities	46	4.4	44	4.3	36	4.1	36	4.1	36	4.1	53	4.5
Wildlife viewing	65	4.6	37	4.1	42	4.2	49	4.2	75	4.6	54	4.4
Transportation within Alaska	28	4.1	42	4.4	54	4.5	46	4.3	31	3.9	39	4.2
Friendliness of residents	65	4.6	75	4.7	69	4.6	67	4.6	71	4.6	68	4.7
Value for the money	26	3.9	36	4.2	48	4.3	33	4.1	26	3.9	23	3.9
Very likely to recommend Alaska	74%		78%		81%		76%		69%		81%	
Very likely to return to Alaska in next five years	80%		84%		62%		84%		82%		87%	

Previous Alaska Travel
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Been to Alaska before for vacation	75%	74%	65%	80%	83%	79%
Average # of vacation trips (base: repeaters)	6.1	5.7	4.0	5.5	9.0	5.9
Previous mode of transportation used to enter/exit Alaska						
Air	92%	94%	95%	85%	85%	90%
Cruise	4	5	5	2	3	10
Highway	4	2	2	6	2	2
Ferry	1	<1	1	5	12	<1
	Sitka	**Girdwood**	**Seward**	**Kenai/ Soldotna**	**Southwest**	**Far North**
Been to Alaska before for vacation	80%	71%	52%	76%	77%	79%
Average # of vacation trips (base: repeaters)	6.2	6.5	3.7	5.1	5.0	5.9
Previous mode of transportation used to enter/exit Alaska						
Air	94%	86%	74%	84%	98%	95%
Cruise	2	16	22	12	5	-
Highway	2	-	6	4	<1	-
Ferry	7	-	-	<1	1	-

Trip Planning
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Ave. # of months, trip decision	2.6	2.6	2.6	3.3	2.6	3.3
Ave. # of months, trip booking	1.6	1.5	1.5	1.4	1.3	2.0
Used Internet[1]	67%	68%	67%	64%	67%	64%
Booked over Internet[1]	57	58	54	54	60	60
Booked through travel agent[1]	21	20	34	24	17	25
Other Sources – Top 5[1]						
Prior experience	64%	65%	48%	67%	80%	71%
Friends/family	47	45	43	40	44	55
Brochures	5	5	6	7	3	4
Travel guide/book	5	5	6	8	4	7
Television	5	4	6	5	6	7
	Sitka	**Girdwood**	**Seward**	**Kenai/ Soldotna**	**Southwest**	**Far North**
Ave. # of months, trip decision	2.9	2.4	3.2	2.6	3.9	2.9
Ave. # of months, trip booking	1.7	2.1	1.7	1.7	1.9	1.9
Used Internet[1]	70%	*	*	*	*	*
Booked over Internet[1]	63	*	*	*	*	*
Booked through travel agent[1]	13	*	*	*	*	*
Other Sources – Top 5[1]						
Prior experience	51%	*	*	*	*	*
Friends/family	40	*	*	*	*	*
Brochures	5	*	*	*	*	*
Travel guide/book	3	*	*	*	*	*
Television	4	*	*	*	*	*

[1] Based to intercept respondents only.
* Sample size too small for analysis.

Demographics
Destinations

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Origin						
Western US	57%	58%	53%	70%	78%	59%
Southern US	18	18	18	13	9	15
Midwestern US	10	10	9	5	3	13
Eastern US	6	6	8	4	4	6
Canada	4	2	2	6	4	3
Other International	4	4	8	2	1	2
Other Demographics						
Average party size[1]	1.5	1.4	1.6	1.5	1.5	1.5
Male/female	56/44	56/44	58/42	58/42	61/39	49/51
Average age	44.7	45.1	43.3	45.7	45.4	44.7
Children in household	33%	32%	39%	40%	32%	30%
Retired/semi-retired	20	19	16	22	20	24
College graduate	59	62	62	59	49	46
Average income	$103,000	$107,000	$102,000	$105,000	$102,000	$88,000

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Origin						
Western US	85%	43%	43%	53%	64%	45%
Southern US	6	29	19	20	16	35
Midwestern US	1	14	11	15	9	7
Eastern US	3	6	20	10	3	5
Canada	3	6	2	1	3	6
Other International	2	2	5	1	6	2
Other Demographics						
Average party size[1]	1.5	*	*	*	*	*
Male/female	51/49	57/43	51/49	54/46	66/34	68/32
Average age	46.0	43.4	45.8	43.0	44.7	48.7
Children in household	41%	37%	30%	26%	42%	37%
Retired/semi-retired	26	11	15	16	11	26
College graduate	57	67	55	51	69	64
Average income	$87,000	$108,000	$101,000	$94,000	$115,000	$135,000

[1] Based to intercept respondents only.
* Sample size too small for analysis.

Visitor Expenditures, Per Person[1]
Destinations

	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla	Sitka
Ave. in-state expend.	$779	$931	$776	$723	$783	$691
Expend. in location	608	597	414	381	171	484
Lodging	215	194	143	97	34	153
Tours/activity/ entertainment	22	20	16	5	20	54
Gifts/souvenirs/ clothing	110	98	59	47	31	75
Food/beverage	162	121	122	123	65	121
Rental cars/fuel/ transportation	91	115	60	64	18	32
Other	8	49	14	45	3	49

[1] Based to intercept respondents only.

Notes: Expenditure data is provided only for those communities with sample sizes of 50 or more. Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: US Regions

The US market is profiled by region in this chapter: West, Midwest, South, and East. Definitions for each of the regions and sample sizes are provided in the table below.

Market Definition and Sample Size
US Regions

Market	Definition	Sample Size	Maximum Margin of Error
Western US	From Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, or Wyoming	696	±3.7%
Southern US	From Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, or Virginia	87	10.5
Midwest US	From Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, or Wisconsin	175	7.4
Eastern US	From Connecticut, Delaware, Maine, Massachusetts, Maryland, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington, D.C, or West Virginia	64	12.2

Visitors from the four US regions differed from each other, and the overall market, in the following ways.

- Midwestern visitors were much more likely than other visitors to be traveling for vacation/pleasure, at 21 percent (compared to 12 percent of all visitors). Western and Eastern visitors were the least likely to be vacation/pleasure visitors, at 7 and 8 percent, respectively.
- Southern visitors were twice as likely as either Midwestern or Southern visitors to be traveling for business only. Eastern visitors were the most likely to be VFRs.
- Only 1 percent of Western visitors purchased a travel package. This compares to 2 percent of South, 4 percent of East, and 11 percent of Midwest visitors.
- The average length of stay was longer among Southern visitors at 11.2 nights (compared to 8.8 nights among the entire market).
- Destinations within Alaska were fairly consistent among the different US markets, with a few exceptions. Western visitors were twice as likely to visit the Southeast region. Eastern visitors were more likely to visit Fairbanks and Seward. Southern visitors were more likely to visit Girdwood and Portage.
- In terms of activities, visitors from the Midwest and East regions frequently mentioned visiting friends and family, while Southern and Western visitors were more likely to conduct business. Wildlife viewing and hiking were more popular among Eastern visitors.

- Midwestern visitors gave the highest ratings for their trip compared to expectations, followed by East, South, and West. That order changes for overall trip ratings, where Southern visitors gave the highest ratings, followed by East, Midwest, and West.

- Southern and Eastern visitors were the most likely to say they would recommend Alaska to others.

- Western visitors reported the highest rate of repeat travel to Alaska at 83 percent. They were followed by East (70 percent), South (65 percent), and Midwest (61 percent). Midwestern repeat travelers were the most likely to have traveled to Alaska previously via cruise ship (14 percent), followed by Eastern visitors (11 percent).

- Midwestern visitors reported the longest average lead times for their trip decision (3.2 months) and trip booking (2.2 months). Western visitors reported the shortest average lead times (2.4 for deciding and 1.3 months for booking).

- Eastern visitors were most likely to use the Internet to plan their trip, and were also most likely to book portions of their trip online. Southern visitors were least likely to use the Internet. Midwestern visitors were most likely to use a travel agent.

- Eastern visitors had the widest male/female ratio at 64/36, followed by Southern visitors at 62/38.

- The highest average incomes were reported by Southern visitors at $111,000, followed by Western visitors at $103,000, Eastern visitors at $99,000, and Midwestern visitors at $93,000.

Trip Purpose & Packages

US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Trip Purpose					
Visiting friends/rel.	42%	44%	33%	48%	55%
Business only	39	42	51	22	26
Vacation/pleasure	12	7	8	21	10
Business/pleasure	7	6	8	9	9
Purchased multi-day package					
Yes	4%	1%	2%	11%	4%

Transportation Modes

US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Mode of Entry into Alaska					
Air	96%	98%	98%	95%	96%
Highway	4	2	1	5	1
Ferry	1	<1	1	<1	1
Mode of Exit from Alaska					
Air	97%	99%	99%	98%	99%
Highway	3	<1	1	1	1
Ferry	1	1	<1	1	1
Used to Travel Between Communities[1]					
Personal vehicle	21%	19%	16%	35%	30%
Rental vehicle	18	19	24	7	9
Air	19	18	23	17	40
State ferry	2	2	<1	<1	2
Motorcoach/bus	1	<1	1	-	<1
Personal RV	1	1	-	3	-
Train	1	<1	2	<1	-
Rental RV	<1	<1	1	-	-
None of the above	42	44	40	43	29
Don't know/refused	1	1	-	-	5

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Average length of stay in Alaska	8.8 nights	8.1 nights	11.2 nights	8.7 nights	9.6 nights
Regions Visited					
Southcentral	76%	78%	77%	78%	74%
Interior	28	24	30	33	34
Southeast	12	14	7	6	7
Southwest	7	7	6	6	3
Far North	5	4	9	3	3
Destinations Visited, Top 10					
Anchorage	72%	74%	72%	76%	68%
Fairbanks	22	21	22	20	30
Palmer/Wasilla	14	15	12	19	12
Girdwood/Alyeska	11	8	18	15	9
Kenai/Soldotna	7	7	9	11	11
Seward	7	6	8	9	24
Juneau	6	8	5	3	4
Portage	5	4	5	6	10
Ketchikan	4	6	2	1	2
Denali	4	2	6	12	3
Lodging Types Used					
Hotel/motel	57%	54%	66%	50%	53%
Private home	44	46	35	57	56
Lodge	3	2	4	7	3
B&B	2	3	1	2	2
Wilderness camping	1	1	-	2	-
State/nat'l campground	1	<1	1	3	<1
Comm. campground	<1	<1	-	-	<1
Other	9	8	16	5	9

Activities – Top 10[1]
US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Visiting friends/family	49%	53%	41%	61%	56%
Shopping	48	47	43	45	55
Business	44	45	58	31	43
Wildlife viewing	19	18	18	14	29
Hiking/nature walk	10	11	7	11	23
Museums	9	7	8	10	11
Northern Lights	7	4	9	1	11
City/sightseeing tour	6	4	6	3	10
Hist./cult. attractions	6	4	8	5	15
Snow skiing/boarding	5	5	6	4	1

[1] Based to intercept respondents only.

Satisfaction Ratings
US Regions

	All Visitors		Western US		Southern US		Midwest US		Eastern US	
Compared to expectations										
Much higher	17%		12%		18%		28%		25%	
Higher	27		25		32		25		33	
About as expected	54		61		49		47		42	
Value for the money, compared to other destinations										
Much better	15%		10%		21%		29%		17%	
Better	21		25		19		12		14	
About the same	51		54		49		44		58	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall experience in Alaska	58%	4.5	54%	4.5	66%	4.6	55%	4.6	62%	4.6
Accommodations	55	4.5	53	4.4	58	4.5	50	4.4	71	4.7
Restaurants	44	4.3	45	4.3	49	4.3	41	4.3	41	4.3
Shopping	33	4.1	31	4.1	37	4.2	35	4.2	31	4.2
Visitor information services	40	4.1	40	4.1	42	4.4	49	4.3	31	3.8
Sightseeing	56	4.5	55	4.4	64	4.6	48	4.4	51	4.5
Tours and activities	45	4.2	45	4.2	54	4.3	46	4.1	32	4.1
Wildlife viewing	47	4.2	45	4.3	54	4.3	38	4.2	48	4.0
Transportation within Alaska	36	4.2	33	4.1	40	4.2	42	4.2	38	4.2
Friendliness of residents	67	4.6	65	4.6	74	4.7	71	4.7	67	4.6
Value for the money	33	4.0	32	4.0	38	4.1	39	4.2	37	4.2
Very likely to recommend Alaska as a vacation destination	73%		71%		79%		71%		77%	
Very likely to return to Alaska in the next five years	79%		83%		79%		68%		63%	

Previous Alaska Travel
US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Been to Alaska before for vacation	75%	83%	65%	61%	70%
Average # of vacation trips (base: repeaters)	6.1	6.7	3.9	5.0	6.1
Previous mode of transportation used to enter/exit Alaska					
Air	92%	96%	89%	93%	86%
Cruise	4	2	7	14	11
Highway	4	2	1	3	<1
Ferry	1	1	1	<1	1

Trip Planning
US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Ave. # of months, trip decision	2.6	2.4	2.6	3.2	2.8
Ave. # of months, trip booking	1.6	1.3	1.5	2.2	1.8
Used Internet[1]	67%	70%	59%	73%	79%
Booked over Internet[1]	57	62	47	60	69
Booked through travel agent[1]	21	15	24	36	21
Other Sources – Top 5[1]					
Prior experience	64%	74%	57%	47%	70%
Friends/family	47	48	41	60	55
Brochures	5	4	7	5	5
Travel guide/book	5	3	5	5	5
Television	5	5	5	5	5

[1] Based to intercept respondents only.

Demographics
US Regions

	All Visitors	Western US	Southern US	Midwest US	Eastern US
Average party size[1]	1.5	1.4	1.5	1.5	1.4
Male/female	56/44	52/48	62/38	55/45	64/36
Average age	44.7	44.8	44.4	47.3	44.4
Children in household	33%	35%	34%	28%	29%
Retired/semi-retired	20	19	24	29	14
College graduate	59	58	62	57	62
Average income	$103,000	$103,000	$110.,000	$93,000	$99,000

[1] Based to intercept respondents only.

Summary Profile: International

The International market is profiled this chapter, divided into Canada and Other International. Sample sizes are provided in the table below.

Market Definition and Sample Size
International

Market	Definition	Sample Size	Maximum Margin of Error
Canada	From Canada	103	±9.6%
Other International	From international countries other than Canada	146	8.1

International visitors differed from the overall visitor market in several important ways.

- International visitors were much more likely to be traveling for vacation/pleasure: 40 percent of Canadians and 47 percent of other international visitors, compared to 12 percent of the overall fall/winter market. They were much less likely to be VFRs or traveling for business only.
- Canadians were more likely to be traveling for business and pleasure: 12 percent, compared to 7 percent of the overall market and 2 percent of other international visitors.
- About half of Canadians entered and/or exited Alaska by highway. This compares to 3 to 4 percent of all visitors, and 5 to 6 percent of other international visitors. Canadians were also much more likely to travel around the state via personal vehicle.
- Canadians stayed an average of 8.0 nights in Alaska, shorter than the 8.8 night average among all fall/winter visitors. Other international visitors stayed slightly longer, at 9.1 nights on average.
- Canadians showed very different travel patterns in comparison to the overall market. They were much less likely to visit Southcentral (51 percent versus 76 percent) and much more likely to visit Southeast (37 percent versus 12 percent).
- Other international visitors were much more likely than the overall market to visit the Interior (50 percent versus 28 percent). They were much less likely to visit Southeast (5 percent versus 12 percent).
- Both Canadians and other international visitors were more likely than the overall market to use hotels/motels, and less likely to stay in private homes.
- Other international visitors participated in most activities at much higher rates than other visitors: shopping (67 versus 48 percent), wildlife viewing (39 versus 19 percent), visiting museums (30 versus 9 percent), Northern Lights viewing (35 versus 7 percent), city/sightseeing tours (25 versus 6 percent), and snow skiing/boarding (13 versus 5 percent). They participated in business and visiting friends and family at lower rates.

- Canadians' activities tended to resemble the overall market, although they were less likely to visit friends/family or conduct business, and more likely to go skiing/boarding.
- When asked how their trip compared to expectations, other international visitors gave more positive ratings (26 percent "much higher," compared to 17 percent for the overall market). They also gave more positive ratings for value-for-the-money (24 versus 15 percent "much better"). However, these same visitors gave lower-than-average ratings for several satisfaction categories: accommodations, restaurants, shopping, and sightseeing.
- Canadian visitors gave similar ratings to their overall trip as the overall market: 57 percent very satisfied, compared to 58 percent among all fall/winter visitors. They gave lower-than-average ratings for accommodations and restaurants, and higher-than-average ratings for visitor information, tours and activities, and friendliness of residents.
- Canadian visitors were very likely to have been to Alaska before, at 85 percent. This compares to 75 percent of the overall market. Other international visitors were much less likely to have visited Alaska, at 27 percent.
- Canadians tended to have short lead times for trip planning, like the overall market. Other international visitors reported longer average lead times: 4.4 months for the trip decision and 3.0 months for trip booking (compared to 2.6 months and 1.6 months among all fall/winter visitors).
- Canadians used the Internet to plan their trip less often than the overall market (47 versus 67 percent), likely due to their tendency to travel by highway rather than fly. Other international visitors were only slightly less likely to use the Internet (62 versus 67 percent) but booked online much less often (37 versus 57 percent). They were far more likely to book through a travel agent (52 percent versus 21 percent of all visitors).
- Both Canadians and other international visitors reported larger average party sizes than the overall market. They also reported slightly more males.
- Canadians reported a lower average income than the overall market ($86,000 versus $103,000) while other international visitors reported a slightly higher average ($106,000).

Trip Purpose and Packages
International

	All Visitors	Canada	Other Int'l
Trip Purpose			
Visiting friends/rel.	42%	27%	26%
Business only	39	20	25
Vacation/pleasure	12	40	47
Business/pleasure	7	12	2
Purchased multi-day package			
Yes	4%	7%	27%

Transportation Modes
International

	All Visitors	Canada	Other Int'l
Mode of Entry into Alaska			
Air	96%	50%	94%
Highway	4	46	5
Ferry	1	3	<1
Mode of Exit from Alaska			
Air	97%	50%	93%
Highway	3	46	6
Ferry	1	3	1
Used to Travel Between Communities[1]			
Personal vehicle	21%	33%	10%
Rental vehicle	18	8	22
Air	19	12	13
State ferry	2	9	2
Motorcoach/bus	1	-	18
Personal RV	1	2	-
Train	1	-	3
Rental RV	<1	1	-
None of the above	42	38	36
Don't know/refused	1	-	2

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
International

	All Visitors	Canada	Other Int'l
Average length of stay in Alaska	8.8 nights	8.0 nights	9.1 nights
Regions Visited			
Southcentral	76%	51%	66%
Interior	28	23	50
Southeast	12	37	5
Southwest	7	4	9
Far North	5	7	3
Destinations Visited, Top 10			
Anchorage	72%	37%	66%
Fairbanks	22	13	45
Palmer/Wasilla	14	12	6
Girdwood/Alyeska	11	17	6
Kenai/Soldotna	7	2	2
Seward	7	3	9
Juneau	6	10	3
Portage	5	4	5
Ketchikan	4	5	1
Denali	4	1	6
Lodging Types Used			
Hotel/motel	57%	72%	79%
Private home	44	17	23
Lodge	3	4	12
B&B	2	3	1
Wilderness camping	1	4	1
State/national campground	1	-	-
Commercial campground	<1	5	-
Other	9	15	5

Visitor Activities – Top 10[1]
International

	All Visitors	Canada	Other Int'l
Visiting friends/family	49%	24%	29%
Shopping	48	49	67
Business	44	33	21
Wildlife viewing	19	19	39
Hiking/nature walk	10	9	6
Museums	9	6	30
Northern Lights viewing	7	10	35
City/sightseeing tour	6	2	25
Historical/cultural attractions	6	3	4
Snow skiing/boarding	5	12	13

[1] Based to intercept respondents only.

Satisfaction Ratings
International

	All Visitors		Canada		Other Int'l	
Compared to expectations						
Much higher	17%		14%		26%	
Higher	27		35		26	
About as expected	54		42		31	
Value for the money, compared to other destinations						
Much better	15%		1%		24%	
Better	21		29		16	
About the same	51		55		41	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
Overall experience in Alaska	58%	4.5	57%	4.5	60%	4.5
Accommodations	55	4.5	32	4.1	51	4.4
Restaurants	44	4.3	21	4.1	30	4.0
Shopping	33	4.1	34	4.1	30	3.7
Visitor information services	40	4.1	49	4.3	40	4.1
Sightseeing	56	4.5	59	4.4	44	4.3
Tours and activities	45	4.2	51	4.4	48	4.2
Wildlife viewing	47	4.2	40	4.2	53	4.2
Transportation within Alaska	36	4.2	21	4.0	35	4.0
Friendliness of residents	67	4.6	71	4.7	64	4.6
Value for the money	33	4.0	13	3.8	29	3.8
Very likely to recommend Alaska as a vacation destination	73%		67%		73%	
Very likely to return to Alaska in the next five years	79%		83%		50%	

Previous Alaska Travel
International

	All Visitors	Canada	Other Int'l
Been to Alaska before for vacation	75%	85%	27%
Average # of vacation trips (base: repeat travelers)	6.4	8.7	5.0
Previous mode of transportation used to enter/exit Alaska			
Air	92%	46%	96%
Cruise	4	5	-
Highway	4	56	2
Ferry	1	3	-

Trip Planning
International

	All Visitors	Canada	Other Int'l
Ave. # of months, trip decision	2.6	2.5	4.4
Ave. # of months, trip booking	1.6	1.5	3.0
Used Internet[1]	67%	47%	62%
Booked over Internet[1]	57	28	37
Booked through travel agent[1]	21	10	52
Other Sources – Top 5[1]			
Prior experience	64%	52%	17%
Friends/family	47	30	48
Brochures	5	2	13
Travel guide/book	5	7	17
Television	5	6	7

[1] Based to intercept respondents only.

Demographics
International

	All Visitors	Canada	Other Int'l
Average party size[1]	1.5	2.0	1.9
Male/female	56/44	60/40	61/39
Average age	44.7	42.1	43.3
Children in household	33%	32%	30%
Retired/semi-retired	20	6	17
College graduate	59	48	72
Average income	$103,000	$86,000	$106,000

[1] Based to intercept respondents only.

Summary Profile: Highway/Ferry & Package

This chapter profiles two separate markets: the highway/ferry market (visitors who entered or exited Alaska by highway or ferry) and the package market (visitors who purchased a multi-day travel package). Sample sizes are provided in the table below.

Market Definition and Sample Size
Highway/Ferry and Package

Market	Definition	Sample Size	Maximum Margin of Error
Highway/ Ferry	Entered or exited Alaska via highway or ferry	163	±7.6%
Package	Purchased a multi-day travel package	95	10.0

The highway/ferry market differed from the overall Alaska market in numerous ways.

- Highway/ferry travelers were much more likely to be visiting Alaska for vacation/pleasure purposes (41 percent, compared to 12 percent of the overall market). They were also more likely to be combining business and pleasure (13 versus 7 percent). They were less likely to be traveling for business only (12 versus 39 percent), and to be VFRs (33 versus 42 percent).
- Highway/ferry travelers travel within Alaska predominantly by personal vehicle and ferry.
- The highway/ferry market reported an average length of stay of 10.6 nights. This compares to 8.8 nights among the entire fall/winter market.
- Highway/ferry visitors were much less likely than the average visitor to visit Southcentral (47 versus 76 percent), and much more likely to visit Southeast (45 versus 12 percent). They were also more likely to visit the Interior (38 versus 28 percent).
- Highway/ferry visitors participated in several activities at higher rates than other visitors: wildlife viewing, hiking/nature walk, Northern Lights viewing, and city/sightseeing tours. They were less likely to visit friends or family and conduct business.
- The highway/ferry market gave more "very satisfied" ratings to their overall trip experience when compared to the overall market (67 versus 58 percent). They rated transportation within Alaska lower.
- Highway/ferry visitors were very only slightly less likely to have been to Alaska before compared to the average visitor (67 versus 75 percent). However, those that had been reported more frequent trips: 9.6 previous trips, compared to 6.4 for the overall market.
- The average lead time for deciding to visit Alaska was 3.4 months among highway/ferry visitors – higher than that average of 2.6 among the entire market. However, booking lead times were shorter: 1.2 months on average, compared to 1.6 months among all visitors.

- Highway/ferry visitors were much less likely to use the Internet to plan their trip: 44 percent, compared to 67 percent of all visitors. They were also less likely to use a travel agent.
- Highway/ferry visitors were most commonly from Canada, at 40 percent. This compares to just 4 percent of the overall market.
- The average party size of highway/ferry visitors was 2.0, higher than the 1.5 average of all visitors. They were more likely to be male (64 compared to 56 percent) and reported lower average ages (40 versus 45 years). They reported lower levels of educational achievement, and lower average incomes.

Package visitors differed from the overall fall/winter market in the following ways.

- The vast majority of package visitors (75 percent) were traveling for vacation/pleasure purposes, with small minorities traveling for business only (5 percent), business/pleasure (8 percent), or VFR purposes (12 percent). In contrast, the most common trip purposes among the overall market were VFR (42 percent) and business only (39 percent).
- Package travelers almost never used vehicles to travel around the state; instead, they traveled by air (37 percent) and motorcoach (30 percent). This compares to 19 and 1 percent of the overall market, respectively.
- The package market spent an average of 5.8 nights in Alaska, lower than the overall average of 8.8 nights.
- Package visitors traveled to the Interior, the Southwest, and the Far North at higher rates than the overall market, and to Southeast at lower rates.
- The package market was much more likely to stay in hotels/motels (88 versus 57 percent) and lodges (31 versus 3 percent). The were less likely to stay in private homes (16 versus 44 percent).
- Package visitors reported significantly higher rates of participation in most activities when compared to the overall market: shopping (77 versus 48 percent), wildlife viewing (32 versus 19 percent), visiting museums (36 versus 9 percent), Northern Lights viewing (38 versus 7 percent), city/sightseeing tour (25 versus 6 percent), historical/cultural attractions (24 versus 6 percent), and snow skiing/boarding (16 versus 5 percent). They were less likely to visit friends or family and conduct business.
- Compared to all fall/winter visitors, package visitors gave higher compared-to-expectation ratings, but lower overall experience ratings. They gave much lower ratings in the restaurants and accommodations categories. They were also less likely to say they would recommend Alaska to others.
- Package visitors were less than half as likely to have been to Alaska before.
- Package visitors reported much longer trip planning timelines when compared to the overall market: an average 5.3 months for the trip decision (compared to 2.6 months), and 4.2 months for booking (compared to 1.6 months).

- Compared to all fall/winter visitors, package visitors were more likely to use the Internet for research (83 versus 67 percent). However, they were less likely to book online (44 versus 57 percent). Instead, they tended to book through travel agents (75 percent, compared to 21 percent of all visitors).
- Package visitors most commonly listed international countries other than Canada as their place of origin (27 percent). This compares to just 4 percent of the overall market. They were also much more likely to hail from the Midwest (25 versus 10 percent). They were much less likely to come from the West (19 versus 57 percent).
- Package visitors reported larger-than-average party sizes (2.1 people, compared to 1.5 people). They were more likely to have graduated from college (72 versus 59 percent) and reported a higher average income ($109,000 versus $103,000).

Trip Purpose and Packages
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Trip Purpose			
Visiting friends/rel.	42%	33%	12%
Business only	39	12	5
Vacation/pleasure	12	41	75
Business/pleasure	7	13	8
Purchased multi-day package			
Yes	4%	1%	100%

* Sample size too small for analysis.

Transportation Modes
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Mode of Entry into Alaska			
Air	96%	11%	99%
Highway	4	76	1
Ferry	1	13	<1
Mode of Exit from Alaska			
Air	97%	31%	99%
Highway	3	55	1
Ferry	1	15	<1
Used to Travel Between Communities[1]			
Personal vehicle	21%	52%	1%
Rental vehicle	18	5	1
Air	19	5	37
State ferry	2	16	1
Motorcoach/bus	1	2	30
Personal RV	1	5	-
Train	1	<1	11
Rental RV	<1	1	-
None of the above	42	22	24
Don't know/refused	1	1	2

[1] These responses are based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Average length of stay in Alaska	8.8 nights	10.6 nights	5.8 nights
Regions Visited			
Southcentral	76%	47%	74%
Interior	28	38	44
Southeast	12	45	5
Southwest	7	1	11
Far North	5	<1	9
Destinations Visited, Top 10			
Anchorage	72%	41%	69%
Fairbanks	22	15	37
Palmer/Wasilla	14	16	6
Girdwood/Alyeska	11	7	27
Kenai/Soldotna	7	15	2
Seward	7	8	19
Juneau	6	13	5
Portage	5	6	8
Ketchikan	4	13	4
Denali	4	6	7
Lodging Types Used			
Hotel/motel	57%	58%	88%
Private home	44	49	16
Lodge	3	8	31
B&B	2	4	4
Wilderness camping	1	8	5
State/national campground	1	1	-
Commercial campground	<1	8	-
Other	9	9	10

Visitor Activities – Top 10[1]
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Visiting friends/family	49%	39%	4%
Shopping	48	49	77
Business	44	19	8
Wildlife viewing	19	26	32
Hiking/nature walk	10	15	13
Museums	9	8	36
Northern Lights viewing	7	10	38
City/sightseeing tour	6	13	25
Historical/cultural attractions	6	8	24
Snow skiing/boarding	5	3	16

[1] Based to intercept respondents only.

Satisfaction Ratings
Highway/Ferry & Package

	All Visitors		Highway/Ferry		Package	
Compared to expectations						
Much higher	17%		15%		25%	
Higher	27		44		28	
About as expected	54		37		36	
Value for the money, compared to other destinations						
Much better	15%		11%		22%	
Better	21		21		21	
About the same	51		49		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
Overall experience in Alaska	58%	4.5	67%	4.6	51%	4.4
Accommodations	55	4.5	51	4.3	42	4.4
Restaurants	44	4.3	41	4.3	17	3.9
Shopping	33	4.1	33	4.1	17	3.7
Visitor information services	40	4.1	40	4.2	47	4.2
Sightseeing	56	4.5	52	4.4	59	4.5
Tours and activities	45	4.2	55	4.4	45	4.1
Wildlife viewing	47	4.2	51	4.4	47	4.3
Transportation within Alaska	36	4.2	18	3.9	43	4.3
Friendliness of residents	67	4.6	63	4.6	77	4.8
Value for the money	33	4.0	27	3.9	31	4.0
Very likely to recommend Alaska as a vacation destination	73%		71%		58%	
Very likely to return to Alaska in the next five years	79%		80%		54%	

Previous Alaska Travel
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Been to Alaska before for vacation	75%	67%	33%
Average # of vacation trips (base: repeat travelers)	6.4	9.6	4.4
Previous mode of transportation used to enter/exit Alaska			
Air	92%	28%	98%
Cruise	4	1	7
Highway	4	60	2
Ferry	1	8	-

Trip Planning
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Ave. # of months, trip decision	2.6	3.4	5.3
Ave. # of months, trip booking	1.6	1.2	4.2
Used Internet[1]	67%	44%	83%
Booked over Internet[1]	57	36	44
Booked through travel agent[1]	21	8	75
Other Sources – Top 5[1]			
Prior experience	64%	34%	28%
Friends/family	47	45	16
Brochures	5	8	6
Travel guide/book	5	8	18
Television	5	2	4

[1] Based to intercept respondents only.

Demographics
Highway/Ferry & Package

	All Visitors	Highway/Ferry	Package
Origin			
Western US	57%	27%	19%
Southern US	18	11	9
Midwestern US	10	12	25
Eastern US	6	3	6
Canada	4	40	6
Other International	4	6	27
Other Demographics			
Average party size[1]	1.5	2.0	2.1
Male/female	56/44	64/36	60/40
Average age	44.7	39.5	43.5
Children in household	33%	30%	32%
Retired/semi-retired	20	26	18
College graduate	59	38	72
Average income	$103,000	$66,000	$109,000

[1] Based to intercept respondents only.

Section VII: Methodology

Total Traffic

The process of counting visitors to Alaska starts with traffic data. For AVSP V, exit traffic data was used. The following table shows each exit point, along with the type and source of the data. As in AVSP III and IV, the fall/winter period consists of October 1 through April 30.

Exit Points and Data Sources
AVSP V – Fall/Winter 2006-2007

Exit Point	Type of Data	Sources of Data
Domestic Air		
Anchorage	Enplaning passengers exiting the state	Anchorage International Airport; Alaska Airlines
Fairbanks	Enplaning passengers exiting the state	Fairbanks International Airport; Alaska Airlines
Juneau	Enplaning passengers exiting the state	Alaska Airlines
Ketchikan	Enplaning passengers exiting the state	Alaska Airlines
Sitka	Enplaning passengers exiting the state	Alaska Airlines
Other	Enplaning passengers exiting the state	Alaska Airlines
International Air		
Anchorage	Enplaning passengers exiting the state	Anchorage International Airport
Fairbanks	Enplaning passengers exiting the state	Fairbanks International Airport
Highway		
Fraser Border Station (Klondike Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Pleasant Border Station (Haines Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Beaver Creek Border Station (Alcan Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Ferry		
Bellingham	Ferry passengers disembarking at Bellingham	Alaska Marine Highway System
Prince Rupert	Ferry passengers disembarking at Prince Rupert	Alaska Marine Highway System

Because all commercial airlines besides Alaska Airlines only fly directly out-of-state, enplanement data from Anchorage and Fairbanks airports was used to determine exiting passengers aboard non-Alaska Airlines flights. Alaska Airlines, which operates flights within Alaska as well as out-of-state, provided an exact count of outbound passengers for each exit point.

Visitor/Resident Ratios

In order to estimate total visitor traffic, visitor/resident ratios were applied to the total traffic data. A visitor/resident ratio is the proportion of out-of-state visitors to Alaska residents for each exit mode. For most exit points, these ratios were collected in the form of "tallies" at the same time surveys were conducted. McDowell Group surveyors tallied a total of nearly 29,000 people as they were exiting Alaska. The following table shows the number of people tallied for each exit mode.

Visitor/Resident Tally Contacts, by Mode
AVSP V - Fall/Winter 2006-2007

Exit Mode	Passengers Tallied
Domestic Air	22,265
International Air	4,171
Highway	1,469
Ferry	706
Total	**28,611**

All exiting passengers were assumed to be leaving Alaska for the last time (meaning, not re-entering on the same trip), with the exception of highway travelers. Highway traffic had to be adjusted for "last exit" visitors, because some of the traffic recorded in border crossing data re-enters Alaska and exits a second time – for example, many highway visitors exit Alaska on the Alcan highway, drive to Skagway, and exit the state a second time via the Alaska Marine Highway. This issue is explained further in the highway section, below.

Domestic and International Air

For each flight selected for surveying (see **Sampling Procedures**, below), a surveyor would position themselves directly outside the jetway before boarding.[1] As passengers boarded, the surveyor would ask, "Are you an Alaska resident?" and their response was recorded. Every passenger boarding each selected flight was tallied.

For the domestic air mode, ratios were compiled by location, by month, and applied to passenger enplanement data by location, by month.[2] International air ratios were compiled by location, by airline, and applied to passenger enplanement data by location and airline.

Highway

Highway tallies were collected during all survey sample periods. Shifts were four to five hours long Survey/tally stations were set up adjacent to the border stations on three highways: Alcan, Haines Highway, and Klondike Highway. (The Top of the World Highway is closed during the fall/winter study period.)

In addition to the standard visitor/resident question, highway travelers were asked: "Are you re-entering Alaska on this trip?" The final ratio that was applied to traffic data reflected only "last exit" visitors, to avoid double-counting of those travelers who were re-entering Alaska and exiting by another mode or a different highway. Visitor/resident ratios were applied to exiting personal vehicle traffic by location.

There were two highway modes that, as in previous AVSP's, were not sampled: motorcoaches and commercial vehicles. Visitor/resident ratios and adjustment for last exit visitors for these modes were based on a number of sources including interviews with tour operators and border officials. Because visitor traffic

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[1] The one exception to this collection method occurred in Sitka, where the infrequency of flights and small size of the boarding area allowed both surveys and tallies to be conducted outside of the secure area. Tallies were conducted as passengers waited in line to go through security.

[2] Because passengers flying directly out of state from "other" destinations (Petersburg, Wrangell, Yakutat, and Cordova) were not sampled in the survey, tallies were not conducted for these exit points. The visitor/resident ratio for these passengers was based on a compilation of Juneau, Ketchikan, and Sitka ratios.

among these two highway modes is so small, representing 4 percent of all visitors, they are combined with other highway traffic for the purposes of the visitor volume estimate.

Ferry

As in the other exit modes, surveyors would ask passengers aboard sampled ferry voyages exiting Alaska whether they were a resident or visitor. Over 700 tallies were conducted of ferry passengers during the fall/winter sample period. In addition, the project team was able to procure actual passenger origin by month and destination from the Alaska Marine Highway System, compiled from reservation data.

Survey Population

The AVSP Fall/Winter 2006-2007 survey was conducted with out-of-state visitors who were exiting Alaska between October 1, 2006 and April 30, 2007. Seasonal residents such as oil field workers were screened out of the survey. The following table shows how respondents were targeted, by exit mode.

Target Survey Population, by Mode
AVSP V - Fall/Winter 2006-2007

Exit Mode	Target Survey Population
Domestic Air	Boarding flight bound for non-Alaska, domestic destination
International Air	Boarding flight bound for international destination
Highway	Recently crossed Alaska/Yukon border; not intending to re-enter Alaska
Ferry	Disembarking in Prince Rupert or Bellingham

Survey Design

Unlike previous AVSP studies that involved three separate survey instruments, AVSP V utilized one combined instrument. The survey was designed by the McDowell Group study team with input from the Alaska Department of Commerce, Community and Economic Development and the Alaska Travel Industry Association. Questions were formulated with several factors in mind: consistency with previous AVSP survey instruments; streamlining and improving questions where possible; ease of use in intercept *and* online formats; utilizing knowledge gained in other visitor survey projects; and new information needs on the part of the state and the visitor industry.

Survey Staff

The AVSP Fall/Winter 2006-2007 survey staff included 20 surveyors based in the following locations: Anchorage, Fairbanks, Juneau, Ketchikan, Sitka, Whitehorse, and the Yukon border stations on the Haines, Klondike and Alcan highways. Surveyors underwent rigorous training in order to ensure that respondents were dealt with in a friendly and courteous manner, and that all surveys were administered in the same way to minimize bias. The Fall/Winter staff included surveyors who spoke German, Japanese, and Spanish. Surveyors in airports, on cruise ship docks, and aboard ferries wore name badges and uniforms. Highway surveyors wore hard hats, boots, and reflective vests as required by the Yukon Department of Highway and Public Works.

Survey Locations

The following table shows where surveys were conducted. These exit locations account for virtually 100 percent of visitors exiting Alaska. The limited number of visitors using other modes and locations does not warrant including them in the sample.[3] In the Anchorage and Fairbanks airports, online invitation cards were also distributed.

Survey Locations
AVSP V - Fall/Winter 2006-2007

Exit Mode	Survey Location
Domestic Air	
	Anchorage International Airport
	Fairbanks International Airport
	Juneau International Airport
	Ketchikan International Airport
	Sitka Airport
International Air	
	Anchorage International Airport
	Fairbanks International Airport
Highway	
	Fraser Border Station (Klondike Highway)
	Pleasant Border Station (Haines Highway)
	Beaver Creek Border Station (Alcan Highway)
Ferry	
	Aboard Alaska Marine Highway ferries sailing to Bellingham and Prince Rupert

[3] Un-sampled exit modes include: commercial vehicles, private planes, private boats, pedestrians, and airplane passengers flying directly out-of-state from Cordova, Yakutat, Petersburg, and Wrangell.

Sample Sizes

The AVSP Fall/Winter survey program included 1,055 intercept surveys (in-person interviews) and 223 surveys completed online, for a total of 1,278 surveys. The following table shows the number of completed surveys, by exit mode.

Sample Sizes, by Mode
AVSP V – Fall/Winter 2006-2007

Exit Mode	Intercept	Online	Total
Domestic Air	782	223	1,005
International Air	123	-	123
Highway	101	-	101
Ferry	49	-	49
Total	**1,055**	**223**	**1,278**

Sampling Procedure

The sampling process starts with creating a target number of intercept surveys, by month, for each mode and exit point. These targets were largely based on estimated traffic volume. The sample targets were adjusted to ensure appropriate sample sizes. For example, visitors exiting by ferry represent only 0.6 percent of all visitors. If they were represented proportionally in the sample, the target would be too small for analysis (6 out of 1,000 surveys). The ferry target became 50 surveys.

After sample targets were determined for each mode and exit point, monthly targets were determined based on traffic volume, and daily targets based on expected visitor frequency and surveyor capacity. Survey days were selected by month, based on a random start.

Following are more specific sampling procedures for each exit mode.

Domestic and International Air

The air samples were created using flight schedules for all airlines carrying passengers out of the state. For each sample day, flights were selected based on a random start. For each flight that was selected, surveyors had a target number of surveys to complete among boarding passengers. Surveyors would approach randomly selected passengers in the boarding area and complete the required number of surveys. Each surveyor was badged, which allowed them into the secure area of the airport. Official airport security badges, coupled with the heightened compliance with travel security, contributed to the high response rates among domestic air (87 percent) and international air passengers (90 percent).

Highway

The highway sample was based on monthly traffic levels at each of the border stations. Survey stations were set up adjacent to the border stations on the three highways (Alcan, Haines Highway, and Klondike

Highway). Surveyors would work in four to five-hour shifts on each sample day. When motorists had completed their Customs interview, they were directed by signs to pull over to the side of the road, where surveyors would conduct their tally of all motorists, and would randomly select respondents for the intercept survey. Highway travelers who were re-entering Alaska on the same trip were screened out of the survey.

Surveyors were certified in flagging and stopping vehicles by the Yukon Department of Highways and Public Works. They were also able to use official, government-issued signs and cones. The official appearance of the survey stations and surveyors themselves, as well as their proximity to border stations, likely played a role in the high response rate among highway travelers (97.1 percent).

Ferry

Ferry passengers were surveyed onboard Alaska Marine Highway vessels bound for Bellingham and Prince Rupert while they were docked in Ketchikan. Sampled vessels were selected randomly by month among all southbound voyages. Surveyors would approach randomly selected passengers in public areas of the ferry between arrival in and departure from Ketchikan.

Online Component

The AVSP V survey methodology included an online sample in addition to the intercept sample. The online sample was targeted by distributing "invitation cards" to visitors during intercept sample periods (see image, below). The color-printed postcard contained a message from the State tourism office inviting visitors to share information about their trip over the Internet (see below). Recipients were directed to a web address, and each postcard had a unique password. Respondents would then go online and self-administer the survey.

For every intercept survey that was completed, surveyors distributed a target number of invitation cards. Cards were distributed to visitors departing on the same flights as intercept respondents. (For the fall/winter sample, cards were distributed only in the Anchorage and Fairbanks airports. There were not enough visitors in other locations to justify card distribution.)

The online survey was designed to mirror the intercept survey to the greatest extent possible. Questions were asked in the same order, with nearly identical wording to the intercept survey. More explicit directions were necessary for some questions to minimize confusion. If respondents had questions or difficulties filling out the survey, there was a link on the bottom of each screen to contact the Help Desk.

The online method allowed for certain efficiencies not possible in the intercept format. These included automated skip patterns and auto-sum functions in the expenditure section. Destinations visited were automatically linked to a personalized menu as respondents progressed to the activities and expenditures sections. In addition, the self-administered format eliminated the need for data entry.

Response Rates

Response rates show the percentage of people who completed a survey out of the total number of people targeted.

In intercept surveys, the response rate is the number of total surveys, divided by the number of qualified, targeted respondents approached by surveyors. For example, for the Domestic Air mode, there were 903 qualified respondents – that is, out-of-state residents who were exiting Alaska. Of this number, 121 declined to be interviewed. The response rate for Domestic Air is 782 divided by 903, or 86.6 percent.

For the online survey, the response rate is the number of people who completed the online survey, out of the total number of people who received invitation cards. (Only out-of-state visitors exiting Alaska were given cards.) There were 2,072 cards distributed to visitors exiting the state via the Anchorage and Fairbanks domestic terminals. Of these visitors, 223 completed the online survey. The response rate for Domestic Air online respondents is 223 divided by 2,072, or 10.8 percent.

Response Rates, by Mode
AVSP V - Fall/Winter 2006-2007

Exit Mode	Intercept	Online
Domestic Air	86.6%	10.8%
International Air	89.7%	n/a
Highway	97.1%	n/a
Ferry	76.9%	n/a
Total	**87.3%**	**10.8%**

The overall response rate for the intercept sample was 87.3 percent. Although response rates differ by mode and by survey method, the data is not adversely affected. As explained later in this section (Data Weighting), all data is weighted according to traffic volumes by mode and location.

Given the length and complexity of the survey instrument, response rates exceeded expectations for the intercept sample. Nearly nine out of ten visitors approached agreed to complete a 10 to 20 minute survey with a pin as an incentive. Several factors helped: well-trained, friendly surveyors; the eagerness of respondents to share information about their recently completed trip; and, in the case of ferry and air respondents, the lack of other available activities.

Response rates met expectations for the online sample. The response rate was significantly higher in the summer, but that is to be expected, considering vacation/pleasure visitors were more likely to participate in the survey – the fall/winter visitor market is made up primarily of business and VFR travelers, who are less likely to participate in the survey.

Incentives

Incentives are commonly used in surveys to maximize response rates. For AVSP V, incentives were used in both the intercept and online surveys. Intercept respondents were given an Alaska keepsake pin. Online respondents were entered into a drawing to win one of two Alyeska Resort packages. All fall/winter respondents were also entered into a drawing for a Holland America cruise to Alaska, Mexico, Canada or the Caribbean.

Margins of Error

The following table shows the maximum margin of error for the intercept and combined samples. The maximum margin is ±2.7 percent for the overall sample and ±3.0 percent for the intercept sample. The combined sample is used for most data in this report, with a few categories based to intercept respondents only. Sample sizes and margins of error for specific subgroups are presented in the introduction to each section and/or chapter where those subgroups are profiled.

Visitor Survey Margin of Error
AVSP V – Fall/Winter 2006-2007

Survey Method	Sample Size	Maximum Margin of Error
Intercept	1,055	±3.0%
Online	223	n/a
Total	**1,278**	**±2.7%**

Note: The data presented in this report is based to either intercept data or total data. Data based only to online respondents is not reported.

While the margin factors in the table above (and those offered throughout this report) give general guidelines for the margin of error, most data in this report are more accurate than the maximum factors suggest. The margin is based not only on the number of respondents in the base of each question, but on the statistic itself. The expression "maximum margin of error" applies only if the attribute being sampled is distributed 50-50 among the population, such as gender. For gender, the maximum margin of error for the total sample is ±2.7 percent.

However, the potential for error decreases as soon as the survey result moves toward either end of the bell curve. If a survey response is around 80 percent for the total sample of 1,278, the maximum error decreases to ±2.2 percent. This margin would apply, for example, to the survey result for likelihood of returning to Alaska – 79 percent of all visitors said they were very likely to return to Alaska. That same margin would apply to responses around 20 percent. At the 90 and 10 percent level, the maximum margin for the total sample decreases even further, to ±1.6 percent.

Data Processing

Data Weighting

Survey data is often "weighted" to properly reflect known characteristics of a population. The primary weighting in AVSP is by exit mode. For example, AVSP V included 123 surveys of visitors who exited the state via international air, or 10 percent of all surveys. However, this market represents only 2 percent of all fall/winter visitors. In order for these visitors to be properly represented in the overall visitor market, their surveys are "weighted down." All AVSP data was weighted by exit mode to reflect actual traffic volumes.

Online data was weighted by one additional factor: trip purpose. Online respondents traveling for vacation/pleasure were more likely to respond to the survey. Because the intercept method ensured accurate distribution by origin, online data was weighted to reflect trip purpose distribution in the intercept sample.

Combining Data Sets

As explained earlier in this chapter, the visitor survey included two different methodologies: online and intercept. The online survey provided supplement surveys to the Anchorage and Fairbanks domestic air samples. Because the online survey (naturally) received lower response rates, and because the survey was in a different format, several issues had to be addressed before combining the two data sets.

This first issue is bias. Self-selection bias occurs when the characteristics of respondents who choose to answer a survey differ from those of the overall target population. Even though the response rates for the online survey met expectations at 11 percent, there was the possibility that the population that chose to respond to the survey differed from the population in the intercept survey. To address this issue, the study team compared survey results between the two samples. Only trip purpose presented a potential bias; this was addressed with weighting, as described above.

The only other apparent bias was in trip planning. Online respondents were more likely to use nearly all trip planning sources, particularly the Internet. For questions regarding trip planning sources, only intercept data is presented in the report.

The second issue is the difference in survey formats. Although the online survey was designed to mirror the intercept survey, results showed that some questions worked better in a personal interview format than online. In an intercept survey, the interviewer is able to explain and clarify questions when necessary. Following is a list of survey questions where the reported data reverts to the intercept sample only due to misinterpretation in the online survey.

Party size. Respondents were asked how many people were traveling in their party, sharing expenses. Interviewers were able to clarify this question if a respondent (mistakenly) answered with the number of people in their tour group, for example. Online respondents were not given this opportunity to clarify their response. As a result, the average party size among online respondents was higher than among intercept respondents.

Activity participation. Certain activities generated much higher participation rates in the online survey when compared to the intercept survey. These activities tended to be categories that online respondents appeared to interpret more broadly than in the intercept survey, including historical/cultural attractions, Native cultural tours/activities, and shows/Alaska entertainment. Activities that had more straightforward definitions (shopping, birdwatching, White Pass and Yukon Railroad, visiting friends and relatives, and fishing, among others) yielded very similar results for the two samples. It appears that the guidance of the surveyor was essential for respondents to understand some activity categories, and not over-report by counting one activity in two categories, for example.

Transportation between communities. Although this question specifically asked what modes were used to travel *between communities*, it appears that some online respondents misinterpreted this question to refer to modes of transportation used at any point on their trip. For example, online cruise respondents were much more likely to say they used motorcoach, train, and air to travel between communities when compared to the intercept sample. The online respondents were often referring to shore excursions and their travel to get in or out of the state. This was a difficult question for online respondents to understand without the aid of a surveyor.

Expenditures. Questions on expenditures tend to be difficult for visitors to answer, whether intercept or online. Respondents have to rely on their memory, sometimes on purchases made days or weeks beforehand. The level of detail requested on this survey was particularly challenging: visitors were asked for their purchases in each community, in six different categories, in addition to overall spending in the state, spending on packages, and more. The differences in expenditure results between the intercept and online samples indicated that the online respondents had difficulty with the complexity of this part of the survey. For example, some questions referred to spending by party, others asked for per person prices. The overall spending question asked the respondent to discount travel to and from Alaska. In the field, surveyors could help clarify these questions.

Throughout this report, the data in the above categories is accompanied by a footnote and the statement "based to intercept respondents only."