
Section V: Visitor Trends

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

Trip Purpose and Transportation

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.

Satisfaction Ratings

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.).

Trip Planning

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
<i>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?</i>		
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
<i>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?</i>		
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.).

Demographics

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.).

Expenditures

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.