ALASKA

Visitor Statistics Program

Alaska Visitor Volume and Profile

Summer 2006

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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Community and Economic Development

April 2007

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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 summer 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 Territories.

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 49,703 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 2,703 intercept surveys (in-person interviews) and 2,956 surveys completed online, for a total of 5,659 surveys. Visitors were surveyed at all major exit points: airports, highways, cruise ship docks, and ferries. To obtain the online sample, "invitation cards" were distributed to visitors during intercept sample periods, inviting them to participate in the web-based survey. The response rate for the intercept survey was 86 percent; for the online survey, 18 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

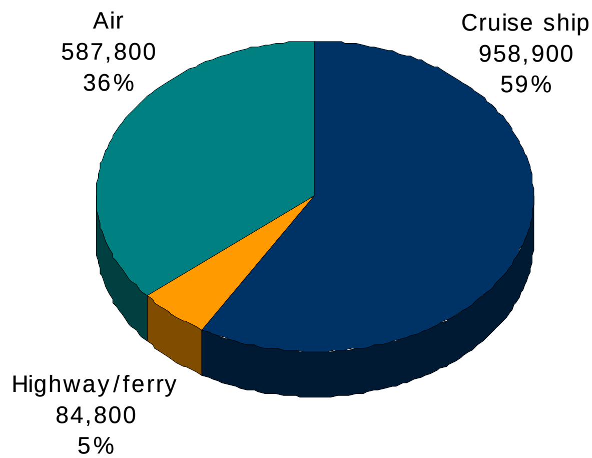
Please see the Methodology chapter for further details.

Visitor Volume, Summer 2006

An estimated 1.63 million out-of-state visitors came to Alaska between May and September, 2006. Of this number, 958,900 were cruise ship passengers, 587,800 were air visitors (entered and exited the state by air), and 84,800 were highway/ferry visitors (entered or exited the state by highway or ferry). Of the total market, 1.34 million were vacation/pleasure visitors, in addition to 146,000 travelers whose main purpose was to visit friends or relatives, and 148,000 business-related visitors.

Southeast Alaska attracted the highest number of Alaska visitors at 1.2 million. Southcentral was visited by 907,000 visitors, and the Interior region by 534,000 (including 450,000 to Denali alone). The two regions with the smallest number of visitors were Southwest (54,000) and Far North (49,000).

Alaska Visitor Volume, Summer 2006
By Transportation Market

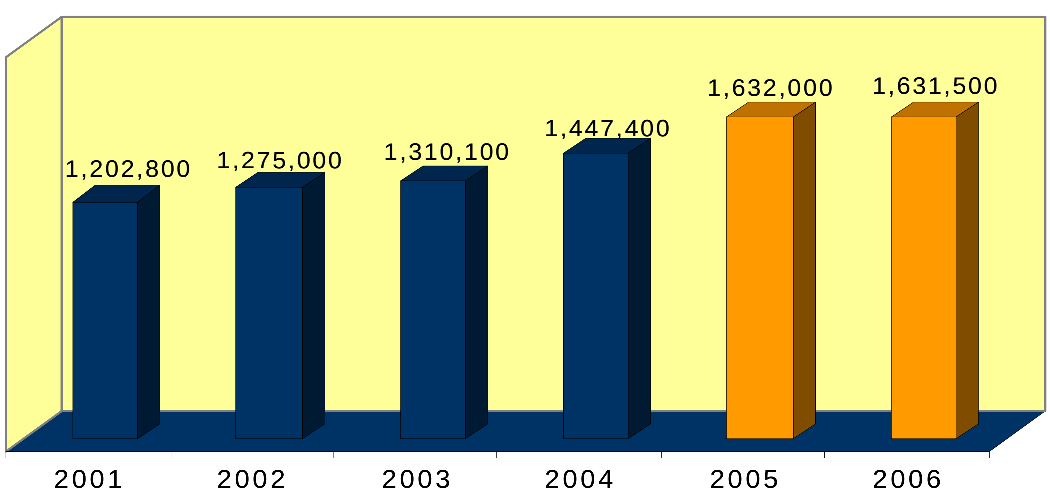


Total Visitor Volume: 1,631,500

Visitor Volume Trends

The chart below shows trends in estimated visitor volume, measured by mode of entry (2001-2004) and exit (2005-2006). Visitation has increased gradually between 2001 and 2006. Although there appears to be a more significant increase between 2004 and 2005, this likely reflects updated data sources and methodology rather than a jump in visitation. The data between 2001 and 2004 was based on visitor/resident ratios collected in 2001, while 2005 and 2006 data was based on 2006 ratios. For further information on the differences between the two sets of data, please refer to the Visitor Volume chapter.

Summer Visitor Volume, 2001-2006



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

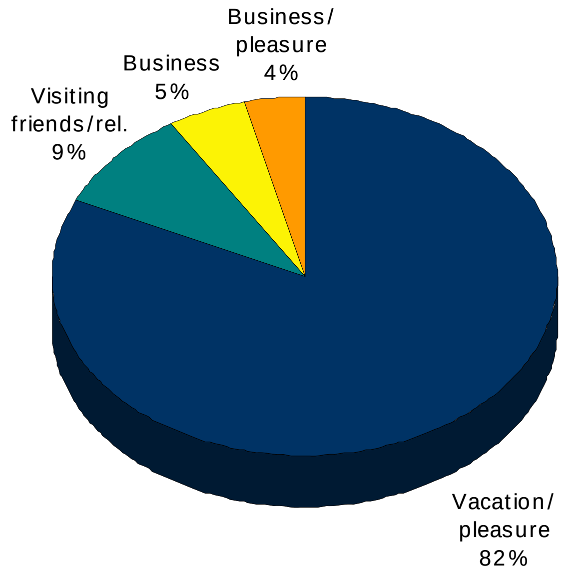
This section summarizes the results of the visitor survey, conducted with out-of-state visitors as they departed Alaska between May and September 2006. A total of 2,703 visitors were surveyed at major exit points: airports, highways, cruise ship docks, and ferries. An additional 2,956 visitors completed online surveys once they returned home, for a total sample of 5,659 visitors. All data was weighted to reflect actual traffic volumes by mode of transportation.

Trip Purpose

Four out of five visitors to Alaska in summer 2006 were traveling for the purpose of vacation/pleasure. Those visiting friends or relatives (VFRs) accounted for 9 percent, while business-related visitors accounted for an additional 9 percent of the market.

Trip purpose varied significantly by transportation market, with 99 percent of cruise visitors traveling for vacation/pleasure. That percentage changes to 82 percent among highway/ferry visitors and 51 percent among air visitors. Air visitors were more likely than other markets to be VFRs (25 percent) and business-related travelers (25 percent).

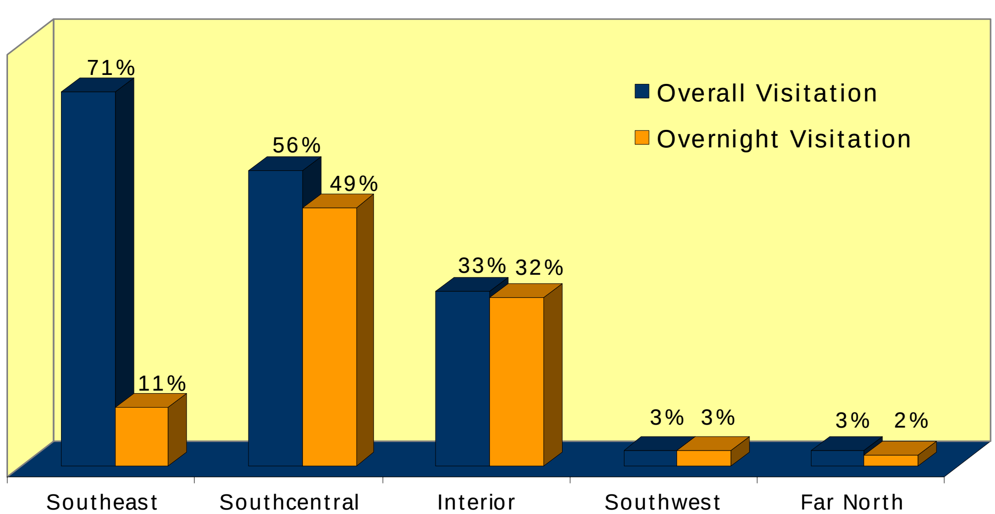
Trip Purpose, Summer 2006



Length of Stay and Destinations

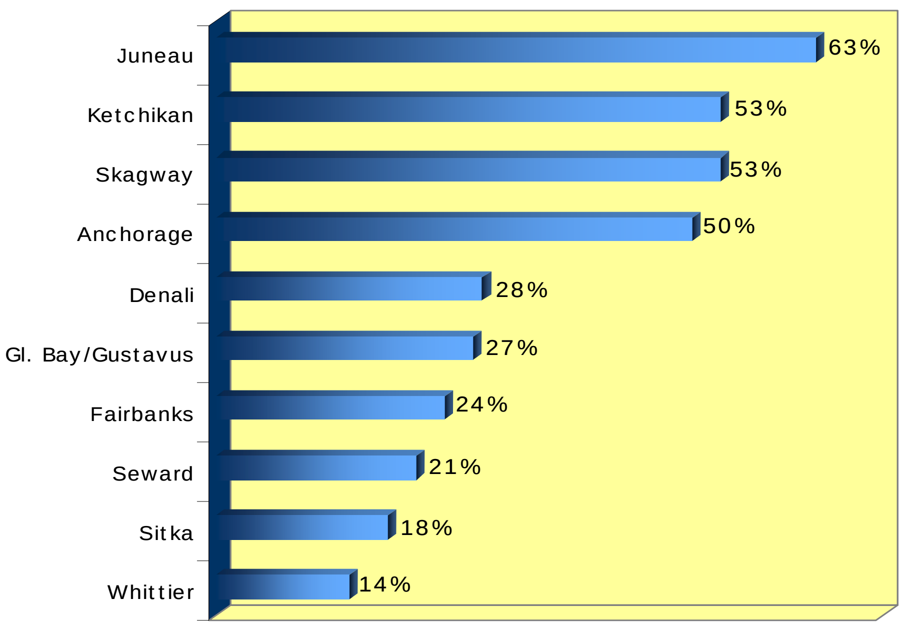
Alaska visitors spent an average of 9.1 nights in the state in the summer of 2006. This figure ranged from 8.1 nights among cruise visitors, to 9.4 nights among air visitors, to 18.8 nights among highway/ferry visitors. Visitors were most likely to visit the Southeast region, followed by Southcentral, Interior, Southwest, and Far North. This order changes when day visits (including cruise ship calls) are removed, showing only overnight visitation. The following chart compares overall and overnight visitation by region.

Regional Visitation, Overall and Overnight, Summer 2006



Cruise ship ports accounted for seven out of the top ten visitor destinations in 2006: Juneau, Ketchikan, Skagway, Glacier Bay, Seward, Sitka, and Whittier. Other destinations in the top ten included Anchorage, Denali, and Fairbanks.

Top Ten Destinations, Summer 2006



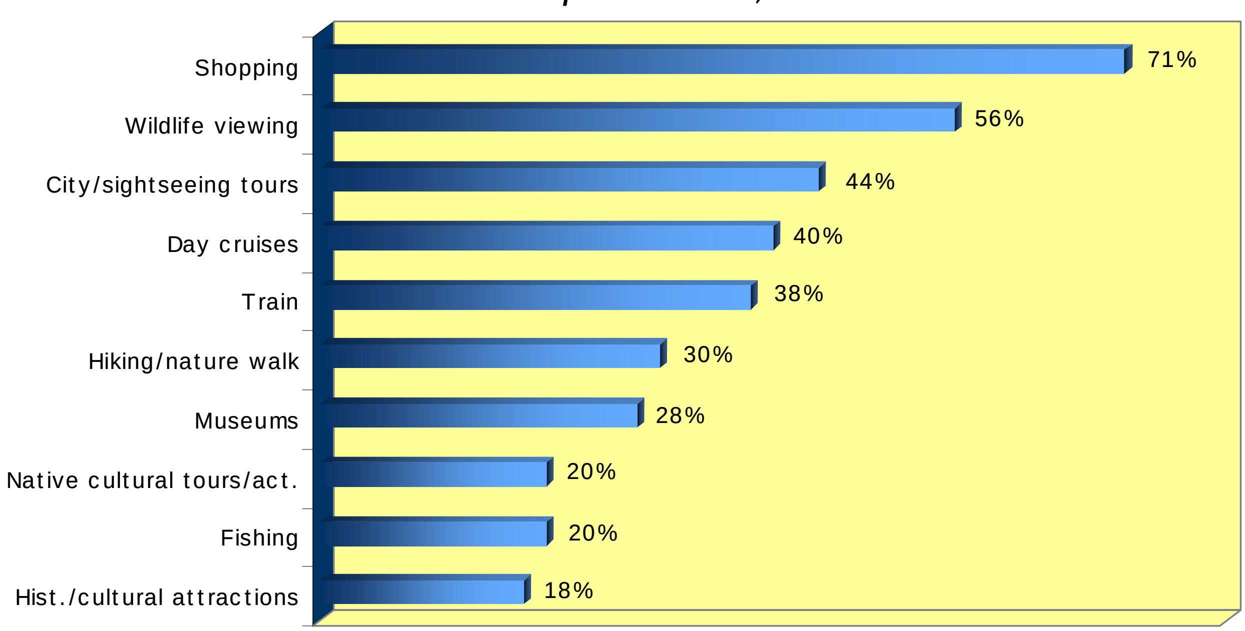
As seen in the previous graphic, when overnight destinations are considered separately, visitation figures change significantly. Just 4 percent of visitors overnighted in Juneau, the top overall destination. Anchorage is the most popular overnight destination at 41 percent of all visitors. It is followed by Denali at 25 percent and Fairbanks at 23 percent.

Air visitors were most likely to visit the Southcentral region; virtually all cruise passengers visited Southeast, and highway/ferry visitors traveled widely throughout the state.

Activities

The number one activity among Alaska visitors in summer 2006 was shopping, mentioned by 71 percent of respondents. Participation rates were also high for wildlife viewing, city/sightseeing tours, day cruises, and train. Activity participation varied widely by transportation market, with cruise visitors reporting a higher number of activities, and more tour-oriented activities. Air visitors were more likely to participate in fishing, while highway/ferry visitors showed higher-than-average visitation to museums.

Top Ten Activities, Summer 2006

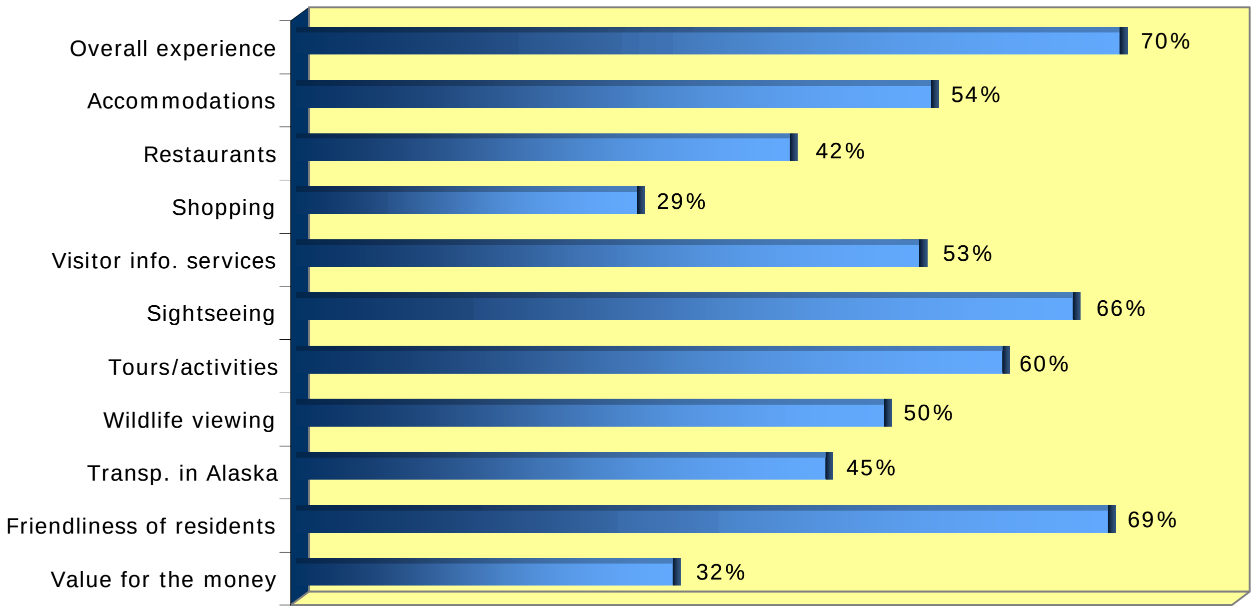


Note: Activity participation rates are based to intercept respondents only.

Satisfaction Ratings

Alaska visitors expressed high levels of satisfaction with most aspects of their Alaska trip. The highest-rated aspect, with 70 percent of visitors very satisfied, was the overall trip experience. Close behind was friendliness of residents, followed by sightseeing and tours/activities. Dissatisfaction was consistently very low, accounting for fewer than 5 percent of responses for most categories. Only three categories earned 5 percent or more dissatisfied ratings: shopping (5 percent), value for the money (7 percent), and wildlife viewing (7 percent). Supporting these high ratings, 79 percent of visitors said they were very likely to recommend Alaska to others, and another 18 percent said they were likely.

Satisfaction Ratings, Summer 2006
Percent of Visitors "Very Satisfied"

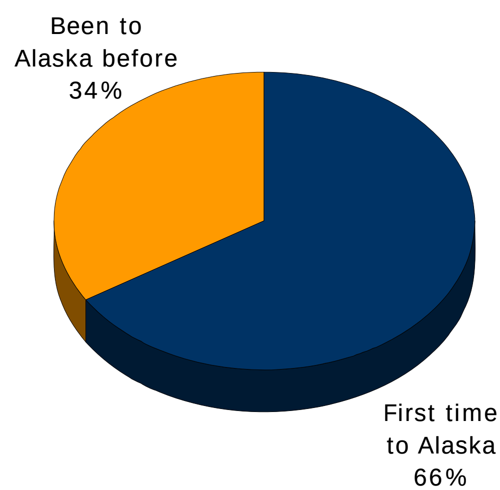


Previous Alaska Travel

One-third of Alaska visitors in summer 2006 had visited Alaska previously. This number ranged from 59 percent among air visitors, to 50 percent among highway/ferry visitors, to 19 percent among cruise visitors. The average number of previous Alaska vacation trips among repeat visitors was 3.4.

Repeat visitors were asked how did they entered and exited the state on their last trip. In response, 72 percent of repeat visitors said they traveled by air, 26 percent by cruise ship, 11 percent by highway, and 3 percent by ferry.

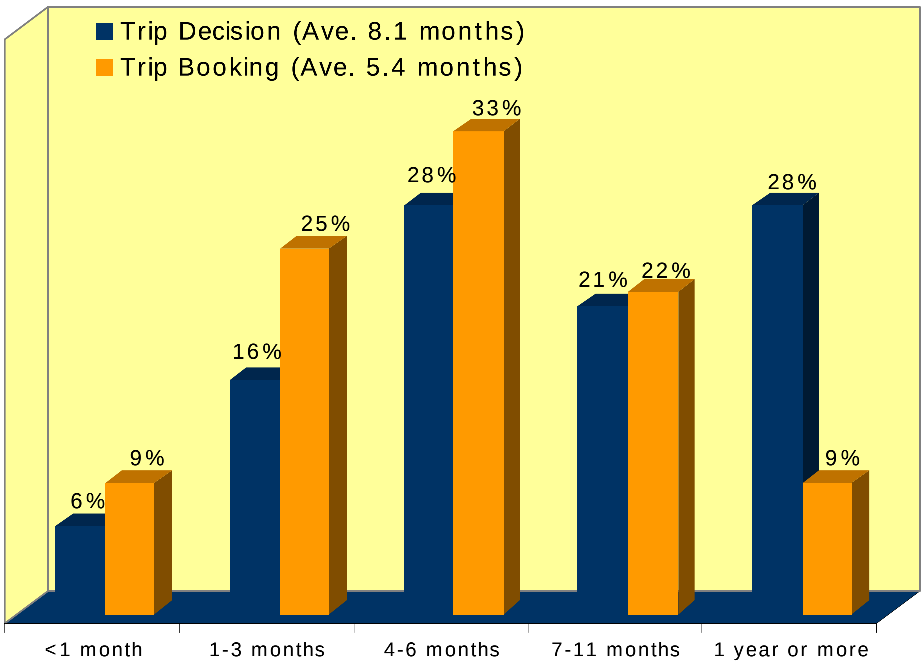
Repeat Travel to Alaska, Summer 2006



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 visitors: 4 to 6 months before the trip.

Advance Time for Trip Planning, Summer 2006



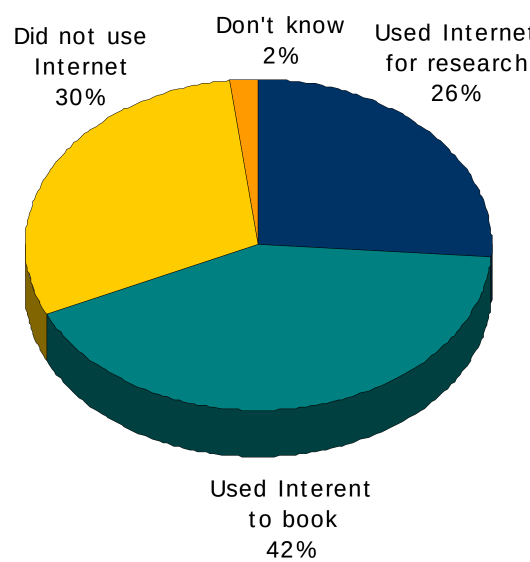
The average lead time for the trip decision was 8.1 months, and for trip booking 5.4 months, among all visitors. Air visitors showed a lower average for the trip decision (6.3) than either cruise (9.0) or highway/ferry visitors (9.5). That relation changes for booking: highway/ferry visitors report the shortest lead time at 2.6 months, air visitors are slightly longer at 3.5 months, and cruise passengers report the longest average lead times for booking at 6.7 months.

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 68 percent of visitors used the Internet to plan their trip. This figure includes 42 percent who booked at least one component online. The most common item booked online was airfare (30 percent) followed by tours (15 percent) and lodging (12 percent).

Just over half of visitors reported booking a portion of their trip through a travel agent, ranging from 24 percent of air visitors, to 71 percent of cruise visitors, to 11 percent of highway/ferry visitors.

Other popular information sources included friends/family (45 percent), cruise line/tour company (38 percent), prior experience (26 percent), and brochures (25 percent). Air visitors tended to use fewer sources, relying heavily on friends/family and prior experience. Cruise visitors often cited cruise line/tour company but also frequently used friends/family, brochures, AAA, television, and travel guides. The highway/ferry market mentioned the widest variety of sources – corresponding to their tendency to plan all components of their trip, rather than book packages.

Internet Usage, Summer 2006

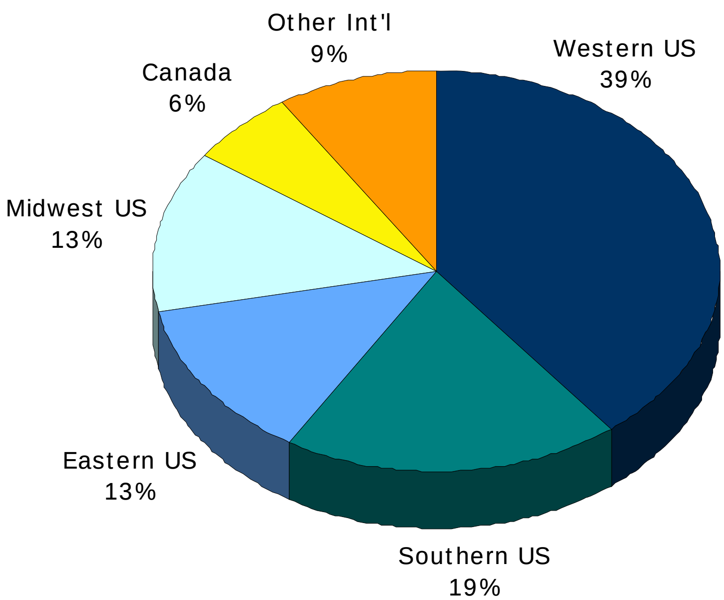


Note: Based to intercept respondents only.

Demographics

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

Visitor Origin, Summer 2006



Origin data shows that the West accounted for the largest share of Alaska's visitors in summer 2006, at 39 percent. It is followed by the South (19 percent), and East and Midwest (both at 13 percent). Canada accounted for 6 percent of all visitors, and other international countries for 9 percent. International visitors were most likely to be from Europe, particularly the United Kingdom.

Air visitors were more likely than other travelers to be from the West; cruise visitors more likely than average to be from the South and the East; and highway/ferry visitors more likely to be from Canada.

The average party size among summer visitors was 2.4 people, ranging from 2.1 among air visitors, to 2.3 among highway/ferry visitors, to 2.5 among cruise visitors. Six out of ten visitors were traveling in couples, while 18 percent were traveling alone, and 22 percent in parties of three or more.

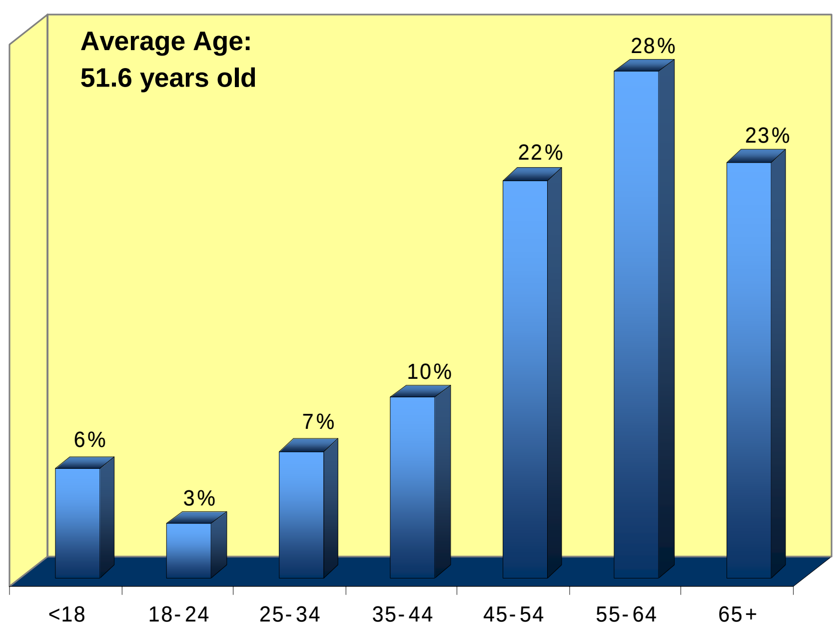
Alaska visitors reported an even gender split in the summer of 2006, with air visitors more likely to be male, and cruise visitors slightly more likely to be female. The average age among visitors was 51.6 years. The chart below illustrates the percentage of visitors in each age range.

One-quarter of Alaska visitors reported children in their household, and 39 percent said they were either retired or semi-retired.

Six out of ten Alaska visitors had graduated from college, including 26 percent who had earned an advanced degree.

The average household income reported by visitors was $103,000. Both education and income levels were slightly lower among highway/ferry visitors.

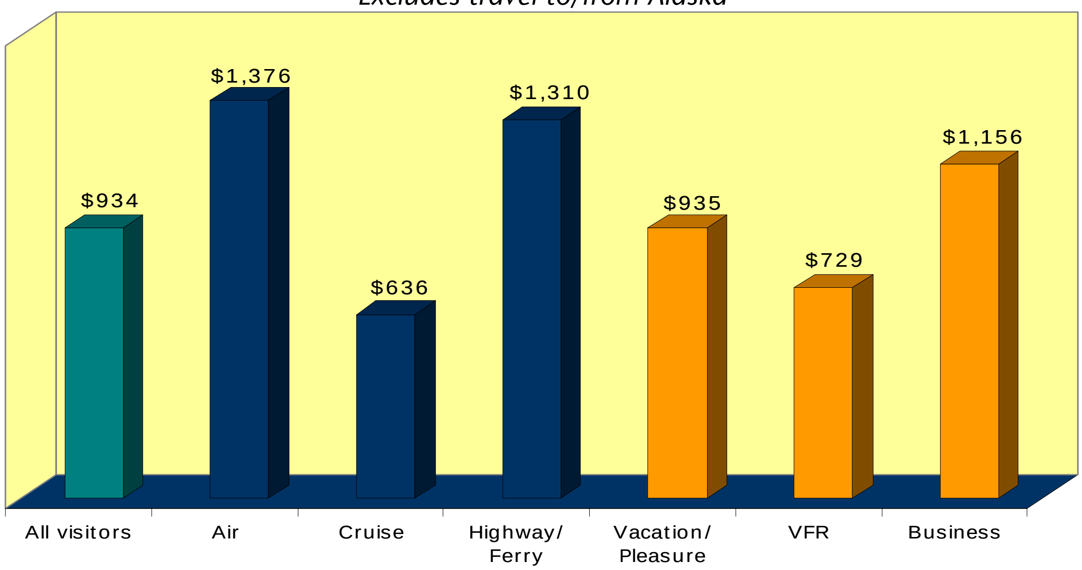
Visitor Age, Summer 2006



Expenditures

On average, visitors spent $934 per person while in Alaska, not including the cost of transportation to enter and exit the state. Considerable differences exist among the transportation markets and trip purposes, as seen in the graph below. Among transportation markets, air visitors had the highest per person average, closely followed by highway/ferry visitors. (While cruise passengers reported the lowest average, it is important to note that the price of their cruise or cruise/tour package is not included in these figures.) Among trip purposes, business-related visitors reported the highest per person average, followed by vacation/pleasure visitors, then VFRs.

Average Per-Person Expenditures, Summer 2006
Excludes travel to/from Alaska



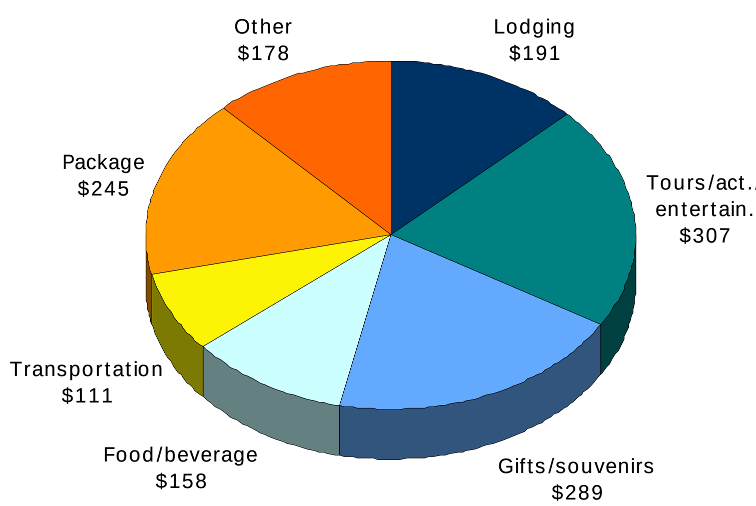
Note: Based to intercept respondents only.

Expenditure results indicate that summer 2006 visitors to Alaska spent a total of $1.5 billion on their Alaska trip, not including travel to and from the state. Air visitors account for $809 million of this figure; cruise visitors for $610 million, and highway/ferry visitors for $111 million.

The pie chart at right shows how the $1.5 billion breaks down in terms of spending category. The largest share of total spending is attributable to tours and activities, at $300 million. The tour sector is closely followed by gifts/souvenirs/ clothing, then non-cruise overnight packages.

Expenses included in cruise passengers' cruise/ tour packages (such as lodging and transportation) are not reflected in these totals. Based on the average reported 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.

Total Visitor Expenditures, Summer 2006
By Category, in Millions of Dollars



Total Visitor Expenditures: $1.5 Billion

Trends

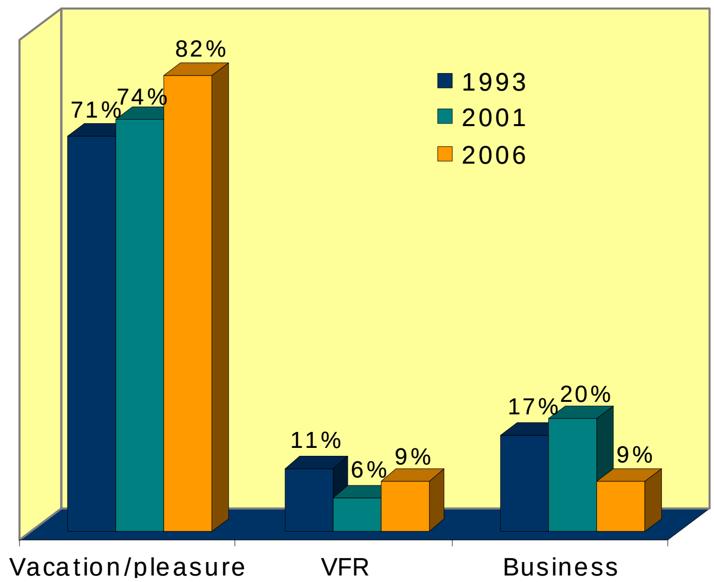
Over the generations of AVSP, visitors to Alaska have changed in several important ways; in others, today's visitors are very similar to their predecessors. The most noticeable shifts are attributable to the growing importance of the cruise industry in the overall market, as described in the visitor volume section. The highway/ferry market has gradually declined, affecting variables like length of stay and trip planning habits.

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 visitor market traveling for vacation or pleasure has increased over the years, from 71 percent in 1993 to 82 percent in 2006. This is a direct reflection of the growth in the cruise ship market in comparison to other visitors (99 percent of cruise ship passengers are vacation/pleasure visitors).

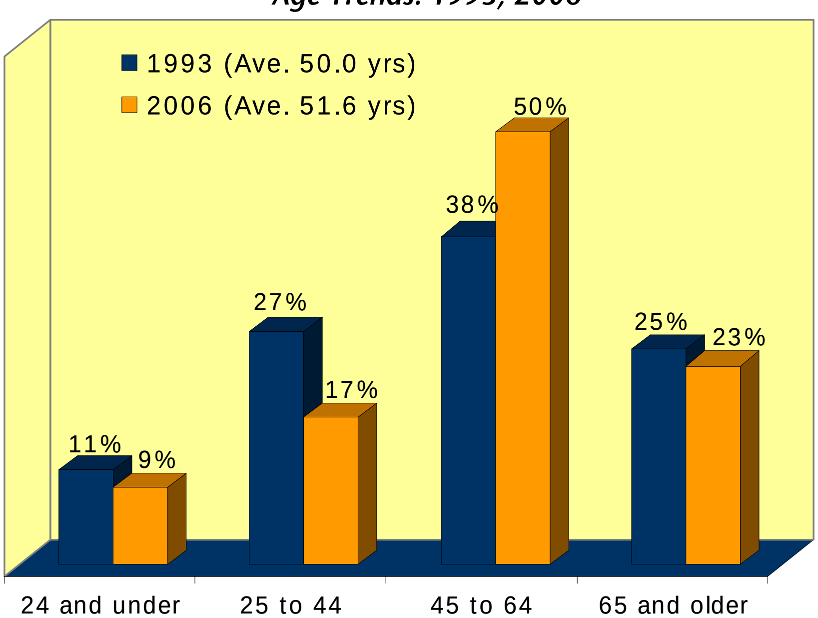
The average length of stay decreased only slightly between 1993 and 2006, from 10.2 to 9.1 nights. A more significant change is detectable in terms of ranges: the proportion staying more than two weeks fell from 22 percent in 1993 to 8 percent in 2006. This reflects the declining share of the market traveling by highway or ferry, who tend to stay much longer in the state.

Trip Purpose Trends: 1993, 2001, 2006



Sources: 1993 data from AVSP III (conducted by McDowell Group); 2001 data from AVSP IV (conducted by Northern Economics). Note: Business category includes business/pleasure visitors.

Age Trends: 1993, 2006



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

The average age of Alaska visitors changed only slightly between 1993 and 2006, from 50.0 to 51.6 years. The oldest (65+) and youngest (<25) segments shifted by only 2 percent each. A larger shift is perceptible in the middle age ranges: The 25-44 segment decreased from 27 percent in 1993 to 17 percent in 2006, and the 45-64 segment increased from 38 percent in 1993 to 50 percent in 2006. (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.)

Section II: Introduction

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 summer 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 Territories, 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: Selected Summary Profiles provides additional analysis based to over 50 subgroups, organized into the following chapters:

Trip Purpose
Highway and Ferry Users
US Regions & Canada
International
Alaska Regions
Southcentral Communities
Southeast Communities
Interior Communities
Southwest and Far North Communities
Sportfishing
Selected Visitor Markets

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, VES response rates dropped from 70 to 55 percent, and 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. 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 methodology allows for visitors to share this information right as they are leaving the state, while their recall is

[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.

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.

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: AVSP V expenditure data is based on information collected from all 2,703 intercept respondents. This compares to 547 expenditure diaries in 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 exists in the 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 May 1 and September 30, 2006. 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 - Summer 2006

Mode	Tally Locations	Passengers Tallied
Domestic Air	Anchorage, Fairbanks, Juneau, Ketchikan, Sitka airports	37,220
International Air	Anchorage and Fairbanks airports	8,010
Highway	Border stations on Klondike, Haines, Alcan, and Top of the World highways	3,499
Ferry	Onboard ferries sailing between Ketchikan and Bellingham, and Ketchikan and Prince Rupert	974
Cruise ship	None; all passengers assumed to be visitors	0
	Total Tallied:	**49,703**

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, Cruise Line Agencies of Alaska, Yukon Department of Tourism and Culture, and the Alaska Marine Highway System.

A full description of these tasks is provided in the Methodology section, starting on page 154.

This section is divided into the following chapters:

Visitor Volume, Summer 2006
Visitor Volume Trends
Visitor Volume, Regions and Communities

Volume by Transportation Market

An estimated 1.63 million out-of-state visitors came to Alaska between May and September, 2006. Of this number, 958,900 were cruise ship passengers, 587,800 were air visitors (entered and exited the state by air), and 84,800 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 transportation *mode* categories, shown in the second table below.

Visitor Volume, by Transportation Market
AVSP V - Summer 2006

Market	Definition	Number of Visitors
Air	Entered *and* exited Alaska by air; cruise passengers excluded	587,800
Cruise ship	All cruise passengers	958,900
Highway/ferry	Entered *or* exited Alaska by highway *or* ferry; cruise passengers excluded	84,800
Total	**All visitors**	**1,631,500**

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 cruise ship visitors exit by air, some ferry visitors exit by highway and vice versa, 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 - Summer 2006

Exit Mode	Number of Visitors
Domestic Air	779,200
Cruise ship[1]	758,100
Highway	65,800
International Air	16,700
Ferry	11,700
Total	**1,631,500**

[1] The total number of cruise ship visitors to Alaska in Summer 2006 was 958,900. Of these visitors, 200,800 exited the state by a different mode, primarily domestic air.

Volume by Trip Purpose

The vacation/pleasure market represented the vast majority of visitors to Alaska in 2006, as seen in the following table. The second-largest trip purpose market was visiting friends/relatives (VFR), followed by business and business/pleasure.

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 - Summer 2006

Trip Purpose	Number of Visitors
Vacation/pleasure	1,338,000
Visiting friends or relatives	145,600
Business	81,600
Business and pleasure	66,300
Total	**1,631,500**

Volume by Region of Origin

Visitors from the Western US represented over one-third of all Alaska visitors in summer 2006, for a total market size of over half a million. The South accounted for about half as many, at 316,500. The East and Midwest each accounted for over 200,000 visitors. The international market represented over 250,000 visitors, including 97,900 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 - Summer 2006

Region of Origin	Number of Visitors
Western US	633,000
Southern US	316,500
Eastern US	217,000
Midwest US	215,400
Canada	97,900
Other international	153,400
Total	**1,631,500**

Note: Column does not add to total due to rounding.

Visitor/Resident Ratios

The following table shows the percentage of traffic for each exit mode that was out-of-state visitors in summer 2006. 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 - Summer 2006

Exit Mode	Percentage Visitors
Domestic Air	71.0%
International Air	81.2%
Highway[1]	33.0%
Ferry	66.9%
Cruise ship	100.0%
Total	**78.0%**

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

Visitor Volume Trends

Summer visitor volume to Alaska increased by 89 percent between 1993 (when AVSP III was conducted) and 2006, for an average annual growth rate of 5.0 percent. Between 2001 (AVSP IV) and 2006 alone, visitation increased by 36 percent. The following table shows visitor volume for the last three AVSP studies.

Total Summer Visitor Volume
AVSP: 1993, 2001, 2006

Year	Total Visitors
1993	861,100
2001	1,202,800
2006	1,631,500
Average annual growth rate	5.0%

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

The table below shows trends in estimated visitor volume by mode of entry (2001-2004) and exit (2005-2006). The change from entry to exit methodology does not affect the data; the same number of visitors entered Alaska as exited Alaska in any given year. However, the data shows a large increase between the two sets of data: visitation appears to have increased 13 percent between 2004 and 2005. This is not a real increase in visitation, but rather a reflection of updated data sources and methodology.

The data between 2001 and 2004 was based on visitor/resident ratios collected in 2001, while 2005 and 2006 data was based on 2006 ratios. The biggest difference in the two sets of ratios can be found in Domestic Air, which accounts for about half of visitors. The 2001 overall Domestic Air ratio was reported as 59 percent. This compares to 71 percent in 2006. This difference results in an apparent 24 percent increase in Domestic Air visitation between 2004 and 2005. The drop in highway visitation between the two years is likely also overstated due to ratio differences, although that market has been declining recently (as the 2005-2006 data shows).

The data between 2005 and 2006 is comparable because it was generated with the same visitor/resident ratios. It shows that visitation was essentially flat between the two summer periods. Visitors exiting by air increased slightly; those exiting by highway decreased slightly; and those exiting by cruise ship and ferry stayed even. Trends in overall cruise visitation can be found on the following page.

Trends in Visitor Volume, By Entry/Exit Mode, 2001-2006
AVSP V - Summer 2006

Entry/Exit Mode	2001	2002	2003	2004	2005	2006
Air	588,900	594,300	592,900	635,600	786,700	795,900
Highway	86,700	82,900	80,400	83,200	72,100	65,800
Cruise ship	510,000	581,000	620,900	712,400	761,100	758,100
Ferry	17,200	16,800	15,900	16,200	12,100	11,700
Total	**1,202,800**	**1,275,000**	**1,310,100**	**1,447,400**	**1,632,000**	**1,631,500**

Note: 2001-2004 data based on entry mode; 2005 and 2006 data based on exit mode.
Sources: 2001-2004 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.); 2005 data based on 2006 visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).

The following table, showing total traffic data (as opposed to visitor volume), provides a better method for comparison between the two sets of data for individual travel modes. Because resident travel is not likely to have fluctuated dramatically over the study period, the trends in traffic data are probably indicative of the overall visitor market.

Trends in Traffic, By Entry/Exit Mode, 2001-2006
AVSP V - Summer 2006

Entry/Exit Mode	2001	2002	2003	2004	2005	2006
Air	992,700	1,006,000	1,003,000	1,075,000	1,103,900	1,117,900
Highway	222,400	213,900	207,300	210,900	214,500	199,300
Cruise ship	510,000	581,000	620,900	712,400	761,100	758,100
Ferry	24,100	23,700	22,400	22,800	17,800	17,500
Total	**1,749,200**	**1,824,600**	**1,853,600**	**2,021,100**	**2,097,300**	**2,092,800**
% change		+4.3%	+1.6%	+9.0%	+3.8%	-0.2%

Sources: 2001-2004 data from *Alaska Visitor Arrivals* studies (conducted by Northern Economics, Inc.); 2005 data based on 2005 traffic data and 2006 visitor/resident ratios obtained for AVSP V (conducted by McDowell Group, Inc.).
Note: Highway traffic for 2001-2004 was adjusted to be comparable to 2005-2006 data. Traffic data for 2001-2004 formerly excluded vehicles that entered the state twice ("double-counted" traffic).

While 2001-2004 data is valuable, the updated methodology of the 2006 study suggests that the recent data is more accurate. In 2001, ratios were based on 21,907 contacts with travelers; this compares to 49,703 contacts in 2006. The overall number of days, sample periods, flights, ferry voyages, etc. increased dramatically between 2001 and 2006. The approach to counting highway visitors was updated with a statistical method of eliminating double-counting (visitors who enter or exit the state twice); in 2001, this was based on anecdotal sources. The method for counting ferry visitors was also improved in 2006, relying on actual AMHS passenger data (rather than visitor/resident tallies) to obtain total visitor volume.

Cruise Volume Trends

The table below shows total cruise passenger volume between 2001 and 2006. Readers are reminded that the cruise traffic cited previously in this chapter refers only to cruise passengers either exiting or entering the state via cruise ship, whereas the table below shows total volume. The cruise traffic data shows the growth of this market over the period of time measured in this trends chapter. Cruise passengers have come to represent an increasingly larger portion of the overall visitor market.

Alaska Cruise Passenger Volume, 2001-2006
AVSP V - Summer 2006

	2001	2002	2003	2004	2005	2006
Cruise volume	690,600	739,800	777,000	884,400	953,400	958,900
Annual % increase	+7.8%	+7.1%	+5.0%	+13.8%	+7.8%	+0.6%

Source: Cruise Line Agencies of Alaska.

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. Survey data has a maximum margin of error of 1.4 percent at the 95 percent confidence level. Percentage visitation to each community for both overall and overnight-only visitation can be found starting on page 29.

Visitor Volume, Regions and Communities
AVSP V - Summer 2006

Region/Community	Number of Visitors
Southeast	**1,160,000**
Juneau	1,034,000
Ketchikan	871,000
Skagway	865,000
Glacier Bay/Gustavus	437,000
Sitka	286,000
Hoonah/Icy Strait Point	176,000
Haines	124,000
Wrangell	34,000
Petersburg	29,000
Prince of Wales Island	15,000
Other Southeast	93,000
Southcentral	**907,000**
Anchorage	814,000
Kenai Peninsula	439,000
Seward	341,000
Kenai/Soldotna	173,000
Homer	153,000
Other Kenai Peninsula	77,000
Whittier	232,000
Talkeetna	207,000
Palmer/Wasilla	139,000
Girdwood/Alyeska	135,000
Prince William Sound	106,000
Portage	98,000
Valdez	67,000
Other Southcentral	73,000
Interior	**534,000**
Denali	450,000
Fairbanks	385,000
Tok	80,000
Glennallen	69,000
Other Interior	62,000
Southwest	**54,000**
Kodiak	20,000
Other Southwest	38,000
Far North	**49,000**
Nome	11,000
Other Far North	41,000

Section IV:
Visitor Profile

Introduction

This section presents results of the visitor survey, conducted with out-of-state visitors exiting Alaska between May and September, 2006. Visitors were surveyed at all major exit points: airports, highways, cruise ship docks, and ferries. A total of 5,659 randomly-selected visitors were surveyed, for a maximum margin of error of ±1.4 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 "Transportation Market." The following table shows how each market is defined, their respective sample sizes, and their maximum margin of error. The three transportation markets are mutually exclusive; together, they account for the total Alaska visitor market.

Transportation Market Definition and Sample Sizes

Market	Definition	Sample Size	Maximum Margin of Error[1]
All Visitors	All respondents	5,659	±1.4%
Air	Entered *and* exited Alaska by airplane; did not spend any nights aboard a cruise ship	2,697	1.9
Cruise	Entered *or* exited Alaska by cruise ship, *or* overnighted aboard a cruise ship	2,238	2.1
Highway/Ferry	Entered *or* exited Alaska by highway *or* ferry; did not spend any nights aboard a cruise ship	724	3.7

This method of analysis is new for AVSP. In previous studies, much of the survey data was presented by "entry mode." If a visitor entered by air but exited by cruise ship, they would be included in the Air category. This created confusion, because the Cruise category did not include the entire cruise market; only those who entered by cruise ship. The Air market, on the other hand, included a large number of cruise passengers. In a similar manner, visitors who entered by highway but exited by ferry would only be included in the highway category, when in reality these two markets have considerable overlap. The change is meant to diminish confusion, and accurately reflect how the travel industry segments the visitor market. The new definitions were created in consultation with the State of Alaska and the Alaska Travel Industry Association.

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

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 Transportation Market

Market	Sample Size	Maximum Margin of Error
All Visitors	2,703	±1.9%
Air	1,283	2.8
Cruise	975	3.2
Highway/Ferry	435	4.9

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.

About four out of five visitors to Alaska in summer 2006 were traveling for vacation or pleasure. This rate is highest among cruise passengers at 99 percent, followed by highway/ferry travelers at 82 percent. One-half of air visitors were traveling for vacation/pleasure.

The VFR market (those visiting friends or relatives) represented one out of ten Alaska visitors in summer 2006. Air visitors were more likely than other travelers to be VFRs, at 25 percent. Air visitors were also more likely to be business and business/pleasure travelers.

A visitor's trip purpose has a major impact on their activities, expenditures, length of stay, trip planning, and other variables. An analysis of responses segmented by trip purpose is provided in the Summary Profiles section. A comparison of trip purpose rates over the years of AVSP can be found in the Trends section.

Trip Purpose
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Vacation/pleasure	82%	51%	99%	82%
Visiting friends or relatives	9	25	<1	12
Business only	5	15	<1	2
Business and pleasure	4	10	1	5

Packages

About seven out of ten Alaska visitors were "package" visitors – that is, they purchased a multi-day (two-day minimum) package that included most trip components. This market includes all cruise visitors, as well as many sportfish visitors, motorcoach tour participants, wilderness lodge guests, and others. It also includes visitors who may have traveled independently for most of their Alaska trip, but purchased a package of two or more days to Denali or Glacier Bay, for example.

Purchase of Multi-Day Packages
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Purchased package	69%	21%	100%	6%
Did not purchase package	30	78	-	87
Don't know	1	1	-	7

Note: Cruise visitors were automatically considered package visitors.

Visitors who had not taken a cruise as part of their trip, but who had purchased a multi-day package, were asked what type of package they had purchased. The most popular kind of multi-day package among non-cruise visitors was fishing lodge, mentioned by 46 percent. This was followed by adventure tour at 14 percent. (The adventure tour category includes activity-focused packages like rafting, biking, kayaking, and hiking tours.) Other package types included wilderness lodge, rail package, and motorcoach tour.

Package Type
Base: Non-cruise visitors who purchased package
By Transportation Market

	Non-Cruise Visitors Package	Air Package	Cruise Not applicable	Hwy/Ferry Package
Fishing lodge package	46%	48%	n/a	10%
Adventure tour	14	15	n/a	11
Wilderness lodge package	13	14	n/a	8
Rail package	9	9	n/a	14
Motorcoach tour	5	4	n/a	15
Other	12	11	n/a	42

Cruise passengers were asked several follow-up questions about their trip. Nearly all (97 percent) had cruised aboard a large ship (over 250 passengers). Just over half said they were on a round-trip voyage, one-quarter were on a cross-gulf trip (cruise one-way, fly one-way), 22 percent were on a cruise with land tour package, and 2 percent sailed in-state only.

Finally, cruise passengers were asked whether they had spent time in Alaska *on their own* before or after their cruise or cruisetour package. One out of eight cruise passengers said they had traveled independently. These "independent cruisers" are profiled separately in the Summary Profiles section.

Cruise Package Type
Base: Cruise Visitors

	Cruise
Large Ship vs. Small Ship	
Large	97%
Small	3
Cruise Package	
Round Trip	52%
Cross-Gulf	24
Cruise + Land Tour	22
In-State Cruise	2
Spent time on own before/after cruise package	
Yes	12%
No	88

Modes of Transportation

The following table shows how visitors entered the state, exited the state, and traveled around the state. Air and cruise are the most popular forms of entering and exiting the state, accounting for over nine out of ten visitors. About one-quarter of cruise passengers entered the state via air, and a similar percentage exited via air.

Visitors were also asked whether they used specific forms of transportation to travel between communities within Alaska. Not surprisingly, responses varied widely by transportation market. Cruise passengers primarily traveled by motorcoach and train; air visitors tended to use personal and rental vehicles; and highway/ferry travelers tended to travel by personal vehicle, personal RV, and ferry. Visitors who traveled only by cruise ship, or who stayed in one community, fell into the "none of the above" category.

Two additional analyses are provided by transportation mode in Section VI: visitors who entered or exited the state via highway, and visitors who used the ferry at any point on their trip.

Transportation Modes
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Mode of Entry into Alaska				
Air	49%	100%	26%	7%
Cruise	45	-	73	-
Highway	4	-	<1	78
Ferry	1	-	<1	15
Mode of Exit from Alaska				
Air	49%	100%	24%	14%
Cruise	47	-	76	-
Highway	4	-	<1	72
Ferry	1	-	-	14
Used to Travel Between Communities[1]				
Motorcoach/bus	26%	9%	38%	2%
Train	19	9	25	5
Rental vehicle	14	34	4	9
Air	12	25	5	8
Personal vehicle	9	22	<1	30
State ferry	3	4	1	25
Rental RV	2	4	<1	5
Personal RV	2	1	<1	26
None of the above	40	19	55	8
Don't know/refused	1	<1	1	7

[1] Based to intercept respondents only.

Visitors who reported entering or exiting the state via highway were asked what type of vehicle they were using. Just under half used an RV or camper, and nearly as many used a car, truck or van. Motorcoach/bus and motorcycle/bicycle were each mentioned by a small minority of highway travelers.[2]

The percentage of visitors entering or exiting the state via motorcoach does not reflect the total motorcoach market. Many motorcoach visitors exit the state via other modes (air, cruise and ferry) and thus are not captured in the data below. Only visitors exiting the state for the last time qualified for the survey.

Type of Vehicle

Base: Entered and/or Exited by Highway

	Entered by Highway	Exited by Highway
RV/Camper	47%	48%
Car/truck/van	46	46
Motorcoach/bus	3	2
Motorcycle/bicycle	3	4

[2] Although drivers and passengers of commercial trucks were counted in the Visitor Volume analysis, they were not sampled in the Visitor Survey.

Length of Stay

Visitors reported an average length of stay in Alaska of 9.1 nights. This figure ranged from 8.1 nights among cruise passengers, to 9.4 nights among air travelers, to 18.8 nights among highway/ferry travelers. The most common trip length fell between four and seven nights, accounting for half of visitors, followed by eight to 14 nights, accounting for one-third of visitors.

Length of Stay in Alaska
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Three nights or less	7%	11%	4%	19%
Four to seven nights	52	38	61	18
Eight to 14 nights	34	38	32	23
15 to 21 nights	5	8	2	14
22 or more nights	3	4	<1	26
Average number of nights	**9.1**	**9.4**	**8.1**	**18.8**

Lodging

After cruise ship, the most common lodging used by summer visitors was hotel/motel, mentioned by 42 percent of visitors, followed by lodge, private home, B&B, campgrounds, and camping. Air visitors were the most likely to stay in hotels/motels and in private homes. In addition to staying onboard their cruise ship, about one-third of cruise passengers stayed in hotels/motels, and 19 percent stayed in lodges. Highway/ferry visitors stayed in the widest range of lodging types, corresponding to their longer trip length.

Lodging Types Used
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Cruise ship	60%	-%	100%	-%
Hotel/motel	42	62	32	37
Lodge	19	21	19	8
Private home	12	31	1	22
B&B	6	14	1	10
Commercial campground	4	5	<1	45
State/national campground	3	5	<1	26
Wilderness camping	2	4	<1	11
Other[1]	7	12	3	13

[1] Other lodging types include youth hostel, boat/yacht, non-campground vehicle camping, and others.

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).

When overnight and day visits are combined, Southeast was the most visited region, at 71 percent. Southcentral attracted 56 percent of all visitors; Interior was visited by 33 percent; and Southwest and Far North were each visited by 3 percent of all visitors. Juneau was the number one most-visited community, followed by Ketchikan, Skagway, Anchorage, and Denali. (On the ATIA map below, Southeast is shown as Inside Passage.)

The analysis based only to *nights spent in communities* shows a very different picture. Without the day visits to Southeast ports by cruise passengers, Southcentral becomes the most-visited region, at 49 percent, followed by the Interior at 32 percent, and Southeast at 11 percent. The most common overnight destinations were Anchorage, Denali, Fairbanks, and the Kenai Peninsula.

Destinations varied considerably by transportation market. Air visitors were most likely to visit the Southcentral region, particularly Anchorage. This reflects the larger proportion of air visitors who were traveling for VFR and business. Over one-third of air visitors also traveled to the Interior region, while 21 percent visited Southeast. Cruise visitors traveled widely in Southeast, but their overnight visits were concentrated heavily in Anchorage, Denali, and Fairbanks. Highway/ferry visitors showed the widest range of travel. Each of the three major regions (Southeast, Southcentral, and Interior) attracted over 60 percent of this market.

The average number of nights by region shows that the Southwest and Far North regions attracted the longest-staying visitors, at 7.3 and 6.1 average nights, respectively. Southcentral and Southeast were close in average stays, at 5.8 and 5.7 nights. Interior visitors stayed an average of 4.3 nights. Communities showing particularly long average stays include: Kodiak (6.9 nights), Prince of Wales Island (6.3 nights), and Kenai Peninsula (5.3 nights). Visitors tended to spend shorter amounts of time in Whittier (1.4), Talkeetna (1.5), Tok (1.6), and Glennallen (1.8).

Profiles of visitors to individual regions and 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 Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Southeast	**71%**	**21%**	**99%**	**62%**
Juneau	63	9	96	21
Ketchikan	53	7	81	19
Skagway	53	2	81	40
Glacier Bay/Gustavus	27	4	40	9
Sitka	18	6	25	9
Hoonah/Icy Strait Point	11	1	17	2
Haines	8	1	9	27
Wrangell	2	2	1	10
Petersburg	2	2	1	10
Prince of Wales Island	1	2	<1	2
Other Southeast	6	3	8	3
Southcentral	**56%**	**79%**	**42%**	**69%**
Anchorage	50	73	37	59
Kenai Peninsula	27	45	15	48
Seward	21	32	14	37
Kenai/Soldotna	11	22	3	29
Homer	9	20	2	33
Other Kenai Peninsula	5	11	1	12
Whittier	14	14	14	18
Talkeetna	13	15	11	17
Palmer/Wasilla	9	18	1	35
Girdwood/Alyeska	8	18	3	13
Prince William Sound	6	7	6	12
Portage	6	13	2	11
Valdez	4	7	1	29
Other Southcentral	4	7	3	8
Interior	**33%**	**37%**	**27%**	**71%**
Denali	28	26	27	46
Fairbanks	24	22	22	50
Tok	5	2	2	56
Glennallen	4	7	<1	31
Other Interior	4	6	1	21
Southwest	**3%**	**8%**	**1%**	**2%**
Kodiak	1	3	<1	<1
Other Southwest	2	6	<1	2
Far North	**3%**	**5%**	**1%**	**7%**
Nome	1	1	<1	1
Other Far North	2	4	1	6

Overnight Destinations
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Southcentral	**49%**	**76%**	**32%**	**73%**
Anchorage	41	62	28	57
Kenai Peninsula	18	36	5	46
Seward	10	19	4	28
Homer	6	13	1	26
Kenai/Soldotna	6	13	1	23
Other Kenai Peninsula	3	7	<1	9
Talkeetna	7	7	7	9
Palmer/Wasilla	4	7	<1	21
Valdez	4	6	<1	28
Girdwood/Alyeska	2	4	2	3
Whittier	1	1	1	5
Prince William Sound	1	1	1	3
Portage	1	1	<1	4
Other Southcentral	2	5	<1	7
Interior	**32%**	**32%**	**28%**	**71%**
Denali	25	20	27	41
Fairbanks	23	20	23	49
Tok	4	1	2	44
Glennallen	2	3	<1	18
Other Interior	2	3	<1	15
Southeast	**11%**	**19%**	**3%**	**50%**
Juneau	4	7	2	15
Skagway	3	1	2	26
Ketchikan	3	6	1	7
Sitka	2	5	<1	4
Haines	1	1	-	20
Prince of Wales Island	1	2	<1	2
Petersburg	1	1	<1	3
Glacier Bay/Gustavus	1	2	-	2
Wrangell	1	1	-	3
Hoonah/Icy Strait Point	<1	<1	-	1
Other Southeast	1	2	<1	2
Southwest	**3%**	**7%**	**<1%**	**2%**
Kodiak	1	3	<1	<1
Other Southwest	2	5	<1	2
Far North	**2%**	**4%**	**<1%**	**4%**
Nome	<1	1	<1	<1
Other Far North	1	3	<1	4

Average Number of Nights

Base: Those who overnighted in each destination

By Transportation Market

	Overnight Visitors	Overnight Air	Overnight Cruise	Overnight Hwy/Ferry
Southcentral	**5.8**	**7.4**	**2.2**	**14.6**
Anchorage	3.3	4.3	1.6	5.6
Kenai Peninsula	5.3	5.1	2.3	10.5
Seward	2.3	2.2	1.6	4.0
Homer	3.3	3.2	*	4.2
Kenai/Soldotna	5.2	5.0	*	7.5
Other Kenai Peninsula	6.6	6.0	*	11.7
Talkeetna	1.5	2.1	1.1	*
Palmer/Wasilla	5.1	5.5	*	4.9
Valdez	3.0	2.7	*	3.8
Girdwood/Alyeska	1.9	2.2	*	*
Whittier	1.4	*	1.0	1.7
Prince William Sound	2.6	*	*	*
Portage	*	*	*	*
Other Southcentral	4.8	5.4	*	*
Interior	**4.3**	**5.2**	**3.2**	**7.1**
Denali	2.1	2.5	1.9	2.4
Fairbanks	2.8	4.2	1.7	5.5
Tok	1.6	1.9	*	1.7
Glennallen	1.8	1.8	*	1.7
Other Interior	6.2	9.1	*	2.4
Southeast	**5.7**	**6.2**	**4.1**	**5.3**
Juneau	3.4	4.0	2.1	3.1
Skagway	2.0	2.3	*	2.3
Ketchikan	4.0	4.2	*	5.2
Sitka	4.4	4.6	*	3.0
Haines	2.9	3.6	*	2.6
Prince of Wales Island	6.3	5.6	*	*
Petersburg	3.7	*	*	*
Glacier Bay/Gustavus	3.7	3.8	*	*
Wrangell	3.8	*	*	*
Hoonah/Icy Strait Point	*	*	*	*
Other Southeast	5.8	6.1	*	*
Southwest	**7.3**	**7.5**	*	*
Kodiak	6.9	7.1	*	*
Other Southwest	6.9	7.0	*	*
Far North	**6.1**	**7.1**	*	*
Nome	*	*	*	*
Other Far North	6.0	7.1	*	*

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

Visitors were shown a list of activities and asked which of them they had participated in while in Alaska. The most common activity was shopping, mentioned by seven out of ten visitors. Wildlife viewing was also popular at 56 percent, including 19 percent who specifically mentioned birdwatching. Cultural activities were mentioned by half of visitors, including 28 percent who visited museums, 18 percent who visited historical or cultural attractions, and 15 percent who participated in gold panning or mine tours. Other popular activities included city/sightseeing tours, day cruises, train, hiking, and fishing.

Activity participation varied significantly by transportation market. Cruise visitors showed the widest array of activities, with higher-than-average rates of participation in cultural activities, city/sightseeing tours, day cruises, train, flightseeing, salmon bake, and tramway/gondola, among others. Air visitors were more likely than the average visitor to participate in hiking/nature walk, fishing, business, and visiting friends and relatives. Highway/ferry visitors showed higher-than-average participation in museums, visiting friends and relatives, and unguided fishing.

The data on visitor activities allowed the study team to make two 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.[3] As a percentage of total summer visitors, that represents 20 percent of the overall market. This matches 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.[4]

Profiles of visitors who participated in guided fishing, unguided fishing, and Native cultural tours/activities are provided in the Summary Profiles section.

[3] *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.
[4] www.whitepassrailroad.com/news/september272006.html

Activity Participation[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Shopping	71%	61%	77%	60%
Wildlife viewing	56	54	57	47
Birdwatching	19	20	18	14
Cultural activities	49	38	55	51
Museums	28	28	27	44
Native cultural tours/ activities	20	11	26	8
Historical/cultural attractions	18	14	21	15
Gold panning/mine tour	15	7	20	11
City/sightseeing tours	44	18	60	25
Day cruises	40	28	47	33
Train	38	10	56	11
White Pass/Yukon Route	27	1	43	7
Alaska Railroad	16	9	21	5
Hiking/nature walk	30	38	25	35
Fishing	20	38	8	36
Guided fishing	13	22	8	17
Unguided fishing	8	20	<1	26
Visiting friend/relatives	17	41	2	29
Flightseeing	15	9	18	8
Salmon bake	12	5	17	7
Tramway/gondola	12	5	16	4
Shows/Alaska entertainment	10	8	12	8
Business	8	23	<1	5
Dog sledding	7	5	9	2
Camping	7	13	1	46
Rafting	5	5	5	2
Kayaking/canoeing	5	4	5	3
Biking	3	3	2	3
Northern Lights viewing	1	2	1	1
Hunting	1	1	-	1
Other	7	7	8	1

[1] Based to intercept respondents only.

Compared to Expectations

When asked how well their Alaska trip had lived up to their expectations, over half of visitors (61 percent) said it was either higher or much higher than expectations. Another 35 percent said it was about what they expected. Only 5 percent said the trip was below expectations. The overall compared-to-expectations rating was 3.8 on a 1-5 scale. Cruise and highway/ferry visitors tended to rate their trip slightly higher than air visitors. This reflects their higher proportion of vacation/pleasure visitors, who tended to give higher ratings than VFR or business visitors.

Alaska Trip Compared to Expectations
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
5 - Much higher than expectations	25%	21%	27%	28%
4 - Higher than expectations	36	35	36	32
3 - About what you expected	35	40	32	36
2 - Below expectations	4	4	4	4
1 - Far below expectations	1	<1	1	<1
Average 1-5	**3.8**	**3.7**	**3.8**	**3.8**

Note: Business visitors were screened out of this question.

Value for the Money

Visitors were asked how Alaska rated in terms of value for the money, in comparison to other vacation destinations visited in the last five years. The most common response was that the value was about the same, accounting for half of all visitors. Thirty-eight percent said the value was better or much better, compared to 13 percent who said the value was worse or much worse. There was little difference in response by transportation market.

Value for the Money
Compared with other vacation destinations visited in the past five years
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
5 - Much better	13%	13%	13%	13%
4 - Better	25	22	27	22
3 - About the same	48	49	48	47
2 - Worse	12	15	11	16
1 - Much worse	1	1	1	2
Average 1-5	**3.4**	**3.3**	**3.4**	**3.3**

Note: Business 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.

Visitors expressed high levels of satisfaction with their overall experience, with 70 percent very satisfied, and another 27 percent satisfied. Less than 2 percent were dissatisfied with their overall trip. Average trip ratings were 4.7 on a 1-5 scale, with the average slightly higher among cruise passengers (4.7, compared to 4.6 among air and highway/ferry visitors).

Besides overall experience, categories with the highest number of very satisfied ratings include: friendliness of residents (69 percent), sightseeing (66 percent), and tours and activities (60 percent). As expected, the more mundane categories of shopping and value for the money received lower percentages of very satisfied ratings (29 and 32 percent, respectively). Categories in the middle range of satisfaction include accommodations (54 percent), visitor information services (53 percent), wildlife viewing (50 percent), transportation within Alaska (45 percent) and restaurants (42 percent).

Dissatisfaction was generally very low, accounting for fewer than 5 percent of responses for most categories. Only three categories earned 5 percent or more dissatisfied ratings: shopping (5 percent), value for the money (7 percent), and wildlife viewing (7 percent).

Cruise passengers tended to give slightly higher average satisfaction ratings, with a few exceptions. Air visitors gave a higher average rating to wildlife viewing, and highway/ferry visitors gave a higher average rating to visitor information services.

Satisfaction Ratings: Summary
% "Very Satisfied"
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Overall experience in Alaska	70%	68%	72%	64%
Accommodations	54	43	62	39
Restaurants	42	36	47	33
Shopping	29	26	30	29
Visitor information services	53	51	53	59
Sightseeing	66	67	65	63
Tours and activities	60	59	61	57
Wildlife viewing	50	56	47	55
Transportation within Alaska	45	39	51	26
Friendliness of residents	69	65	71	68
Value for the money	32	28	35	25

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

Satisfaction Ratings
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Overall experience in Alaska				
5 - Very satisfied	70%	68%	72%	64%
4 - Satisfied	27	30	25	31
3 - Neither/neutral	2	2	1	4
2 - Dissatisfied	1	1	2	<1
1 - Very dissatisfied	<1	<1	<1	-
Average 1-5	**4.7**	**4.6**	**4.7**	**4.6**
Accommodations				
5 - Very satisfied	54%	43%	62%	39%
4 - Satisfied	37	43	33	47
3 - Neither/neutral	6	10	4	12
2 - Dissatisfied	2	3	1	2
1 - Very dissatisfied	<1	1	<1	1
Average 1-5	**4.4**	**4.3**	**4.5**	**4.2**
Restaurants				
5 - Very satisfied	42%	36%	47%	33%
4 - Satisfied	43	46	41	45
3 - Neither/neutral	11	15	9	16
2 - Dissatisfied	3	3	2	5
1 - Very dissatisfied	1	<1	1	<1
Average 1-5	**4.2**	**4.1**	**4.3**	**4.1**
Shopping				
5 - Very satisfied	29%	26%	30%	29%
4 - Satisfied	48	49	47	48
3 - Neither/neutral	19	22	17	20
2 - Dissatisfied	4	3	4	3
1 - Very dissatisfied	1	<1	1	<1
Average 1-5	**4.0**	**4.0**	**4.0**	**4.0**
Visitor information services				
5 - Very satisfied	53%	51%	53%	59%
4 - Satisfied	39	37	40	32
3 - Neither/neutral	8	11	6	8
2 - Dissatisfied	1	1	1	1
1 - Very dissatisfied	<1	<1	<1	<1
Average 1-5	**4.4**	**4.4**	**4.4**	**4.5**
Sightseeing				
5 - Very satisfied	66%	67%	65%	63%
4 - Satisfied	30	27	31	33
3 - Neither/neutral	4	5	3	3
2 - Dissatisfied	1	1	1	1
1 - Very dissatisfied	<1	1	<1	<1
Average 1-5	**4.6**	**4.6**	**4.6**	**4.6**

Satisfaction Ratings (con'td)
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Tours and activities				
5 - Very satisfied	60%	59%	61%	57%
4 - Satisfied	33	32	33	32
3 - Neither/neutral	6	7	5	10
2 - Dissatisfied	1	1	1	1
1 - Very dissatisfied	<1	<1	<1	1
Average 1-5	**4.5**	**4.5**	**4.5**	**4.4**
Wildlife viewing				
5 - Very satisfied	50%	56%	47%	55%
4 - Satisfied	32	33	31	31
3 - Neither/neutral	11	8	13	9
2 - Dissatisfied	6	3	7	3
1 - Very dissatisfied	1	1	2	2
Average 1-5	**4.2**	**4.4**	**4.2**	**4.3**
Transportation within Alaska				
5 - Very satisfied	45%	39%	51%	26%
4 - Satisfied	43	47	41	44
3 - Neither/neutral	8	9	7	25
2 - Dissatisfied	3	4	2	4
1 - Very dissatisfied	1	1	<1	1
Average 1-5	**4.3**	**4.2**	**4.4**	**3.9**
Friendliness of residents				
5 - Very satisfied	69%	65%	71%	68%
4 - Satisfied	26	29	25	24
3 - Neither/neutral	4	5	3	6
2 - Dissatisfied	1	1	<1	2
1 - Very dissatisfied	<1	<1	<1	<1
Average 1-5	**4.6**	**4.6**	**4.7**	**4.6**
Value for the money				
5 - Very satisfied	32%	28%	35%	25%
4 - Satisfied	47	47	48	47
3 - Neither/neutral	14	17	12	21
2 - Dissatisfied	6	7	5	6
1 - Very dissatisfied	1	1	<1	2
Average 1-5	**4.1**	**3.9**	**4.1**	**3.9**

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

Recommending Alaska

Four out of five visitors surveyed said they were very likely to recommend Alaska as a vacation destination to their friends and family, while another 18 percent were likely. Less than 2 percent said they were unlikely to do so. Responses were similar among the different transportation markets.

Likelihood of Recommending Alaska to Friends/Family
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Very likely	79%	77%	80%	77%
Likely	18	20	17	20
Unlikely	1	1	1	1
Very unlikely	<1	<1	1	<1
Don't know	1	2	1	3

Returning to Alaska

Four out of ten visitors said they were very likely to return to Alaska in the next five years. Another 22 percent said they were likely. The likelihood was much higher among air visitors at 66 percent very likely. This compares to 46 percent of highway/ferry visitors and 26 percent of cruise visitors.

The rate of those very likely to return to Alaska (40 percent) closely corresponds to the actual 2006 repeat rate of 34 percent (see following page).

Likelihood of Returning to Alaska in Next Five Years
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Very likely	40%	66%	26%	46%
Likely	22	18	25	23
Unlikely	19	8	25	13
Very unlikely	7	2	10	9
Don't know	11	6	14	9

Previous Alaska Travel

One-third of Alaska visitors in summer 2006 were repeat visitors to the state. That figure is lowest among cruise passengers, at 19 percent. This compares to 50 percent of highway/ferry visitors and 59 percent of air visitors. The high number of repeat travelers in the air market reflects the higher proportion of VFR and business travelers, both more likely to be repeat travelers. A profile of repeat Alaska travelers is provided in the Summary Profiles section.

Repeat Alaska Travel
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
First trip to Alaska	66%	41%	81%	50%
Been to Alaska before	34	59	19	50

Repeat travelers reported an average number of 3.4 previous Alaska vacation trips, ranging from 2.0 trips among cruise passengers, to 4.0 trips among air travelers, to 5.3 trips among highway/ferry travelers. (Those who reported zero previous vacation trips had been to Alaska before, but for business rather than vacation.)

Number of Previous Vacation Trips
Base: Repeat Visitors
By Transportation Market

	Repeat Visitors	Repeat Air	Repeat Cruise	Repeat Hwy/Ferry
None[1]	9%	12%	7%	<1%
One	35	25	52	30
Two	20	19	21	22
Three to five	20	23	14	20
Six to ten	9	12	4	14
Eleven or more	7	9	2	13
Average number of trips	**3.4**	**4.0**	**2.0**	**5.3**

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

Repeat visitors were asked how they entered and exited the state on their last Alaska trip. Air was the most common mode used at 72 percent, followed by cruise ship at 26 percent, highway at 11 percent, and state ferry at 3 percent.

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

	Repeat Visitors	Repeat Air	Repeat Cruise	Repeat Hwy/Ferry
Air	72%	91%	51%	28%
Cruise ship	26	9	58	15
Highway	11	4	11	59
State ferry	3	2	3	6
Other	1	<1	2	<1

Trip Planning Timeline

Alaska visitors decided to come on their trip an average of 8.1 months ahead of time, and booked their major travel arrangements an average of 5.4 months ahead of time. Short-term planners (three months or less) accounted for one out of five visitors for the trip decision, and one out of three visitors for trip booking. Long-term planners (one year or more) accounted for 28 percent for the trip decision, and just 9 percent for trip booking. The most common booking time frame was four to six months before the trip.

Highway/ferry and cruise travelers reported longer lead times in their trip decision (9.5 and 9.0 months, respectively) when compared to air passengers at 6.3 months. That relation changes for booking: highway/ferry travelers report the shortest lead time at 2.6 months, air visitors are slightly longer at 3.5 months, and cruise passengers report the longest average lead times for booking at 6.7 months.

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

Trip Planning Timeline
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
How far in advance did you decide to come on this trip to Alaska?				
Less than one month	6%	13%	2%	13%
One to three months	16	25	12	12
Four to six months	28	28	28	24
Seven to 11 months	21	14	26	9
One year or more	28	20	31	39
Don't know	1	1	1	2
Average # of months	**8.1**	**6.3**	**9.0**	**9.5**
How far in advance did you book your major travel arrangements?				
Less than one month	9%	18%	2%	37%
One to three months	25	38	18	24
Four to six months	33	31	36	19
Seven to 11 months	22	9	30	4
One year or more	9	2	13	2
Don't know	2	1	2	9
Average # of months	**5.4**	**3.5**	**6.7**	**2.6**

Internet Usage

Two-thirds of Alaska visitors in the summer of 2006 used the Internet to plan their trip, including 42 percent who booked at least one component of their trip online. Both usage and booking numbers were highest among air visitors, at 75 percent (usage) and 60 percent (booking). This compares to 66 and 33 percent among cruise passengers, and 58 and 29 percent among highway/ferry visitors.

Internet Usage[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Used Internet	68%	75%	66%	58%
Research only	26	14	32	28
Research and book	42	60	33	29
Did not use Internet	30	25	33	40
Don't know	2	1	2	2

[1] Based to intercept respondents only.

Among all Alaska visitors, 30 percent booked their airfare over the Internet. Tours were booked online by 15 percent; lodging by 12 percent, and cruises by 11 percent. Components booked over the Internet differed significantly by transportation market. Air visitors were more likely to book airfare, lodging, and vehicle rental online. Cruise passengers were more likely to book tours and their cruise.

Trip Components Booked over Internet[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Airfare	30%	56%	18%	17%
Tours	15	9	19	7
Lodging	12	24	5	9
Cruise	11	1	18	-
Vehicle rental	7	17	1	5
Ferry	1	1	<1	9
Overnight packages	1	2	<1	<1
Other	<1	<1	-	<1

[1] Based to intercept respondents only.

Travel Agent Usage

About half of summer 2006 visitors reported booking at least some portion of their trip through a travel agent. The figure was significantly higher among cruise passengers at 71 percent. This compares to 24 percent of air visitors and 11 percent of highway/ferry visitors. Travel agent usage compared to previous AVSP studies can be found in the Trends section.

Travel Agent Usage[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Booked through travel agent	52%	24%	71%	11%
Did not book through travel agent	45	75	25	86
Don't know	3	1	4	3

[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. Nearly one-quarter said they had, with this figure slightly higher among highway/ferry visitors (30 percent). One out of seven visitors (15 percent) said they had received the Official Alaska State Vacation Planner, with highway/ferry visitors again showing higher usage (27 percent).

Usage of State of Alaska Information Sources[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Did you visit the official State of Alaska travel website? (www.travelalaska.com)				
Yes	23%	21%	23%	30%
No	68	74	65	61
Don't know	8	4	10	7
Did you receive the Official Alaska State Vacation Planner?				
Yes	15%	12%	15%	27%
No	78	84	76	66
Don't know	7	4	9	8

[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. The number one source was friends and family, mentioned by nearly half of respondents. Other sources used by more than 10 percent of visitors were cruise line/tour company, prior experience, brochures, AAA, and travel guide/book, and television.

Sources differed significantly by transportation market. Air visitors tended to use fewer sources, relying heavily on friends/family and prior experience. Cruise visitors tended to mention cruise line/tour company but also frequently used friends/family, brochures, AAA, television, and travel guides. The highway/ferry market mentioned the widest variety of sources – corresponding to their tendency to plan all components of their trip, rather than book packages. Their number one source was the Milepost, followed by friends/family, brochures, AAA, and travel guides. They were much more likely than other visitors to mention Convention and Visitors Bureaus.

Other Information Sources[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Friends/family	45%	52%	43%	33%
Cruise line/tour company	38	5	59	2
Prior experience	26	45	16	17
Brochures (net)	25	22	26	32
Community brochures	3	3	1	9
Ferry brochure/schedule	2	2	<1	10
AAA	16	12	18	20
Travel guide/book	13	11	13	20
Television	11	4	16	5
Magazine	8	7	8	8
Milepost	6	9	1	40
Convention & Visitors Bureau(s)	5	7	4	16
Club/organization	4	4	4	2
Hotel/lodge	4	8	2	2
Library	3	2	4	2
Newspaper	3	4	2	3
North to Alaska guide	2	1	3	4
Travel/recreation exhibits	1	1	1	2
Other	2	3	1	3
None	8	10	7	10
Don't know	1	1	1	4

[1] Based to intercept respondents only.

Origin

Alaska visitors in summer 2006 were most likely to be from the Western US, accounting for 39 percent of all visitors. California was the most common state of origin, generating one out of every seven visitors. The Western market was twice as big as the second-largest market, the South (19 percent). The East and Midwest each accounted for 13 percent of visitors. Canadians made up 6 percent of the overall market, and other international countries accounted for 9 percent, for a total international figure of 15 percent. (Additional detail on the international market is provided on the following page.)

Some variances existed among the transportation markets, with air visitors more likely than other travelers to be from the West; cruise visitors more likely than average to be from the South and the East; and highway/ferry visitors more likely than average to be from Canada. An analysis of each US market and Canada is provided in the Summary Profiles section. Trends in origin data are provided in the Trends section.

Origin
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
United States	**85%**	**93%**	**82%**	**65%**
Western US	**39%**	**54%**	**31%**	**32%**
California	14	15	14	6
Washington	8	15	5	8
Oregon	4	6	2	6
Arizona	4	3	4	3
Colorado	2	5	1	1
Idaho	2	3	1	1
Southern US	**19%**	**16%**	**22%**	**15%**
Texas	5	4	6	5
Florida	4	3	5	3
Virginia	2	1	2	1
Eastern US	**13%**	**10%**	**16%**	**4%**
Pennsylvania	3	2	4	1
New York	2	1	3	1
New Jersey	2	1	2	<1
Maryland	2	1	2	1
Midwestern US	**13%**	**12%**	**14%**	**14%**
Minnesota	3	4	2	3
Ohio	2	1	3	1
Michigan	2	1	2	3
Illinois	2	1	2	1
Canada	**6%**	**1%**	**7%**	**24%**
Other International	**9%**	**6%**	**11%**	**11%**
Europe	6	4	7	8
Australia/New Zealand	2	1	2	2
Asia	1	1	<1	<1

International

The table below shows the breakout of the international market (without Canada), based only to those respondents in order to better show the individual regions and countries. Europe accounted for the largest portion of international visitors at 63 percent, including 37 percent from the United Kingdom, and 10 percent from German-Speaking Europe (GSE). One out of five international visitors were from Australia/New Zealand, while 6 percent were from Asia and 5 percent from Mexico. An analysis of international visitors, including profiles of visitors from Europe, German-Speaking Europe, Australia/New Zealand, and Asia, is provided in the Summary Profiles section.

There may be a small degree of bias in the origin data due to language barriers. However, this bias is probably low, considering the high response rates for all modes. In addition, the summer 2006 staff included surveyors who spoke German, Japanese, Cantonese, Spanish, and Portuguese.

Countries of Origin
Base: International Visitors, without Canada
By Transportation Market

	International Visitors	International Air	International Cruise	International Hwy/Ferry
Europe	**63%**	**70%**	**60%**	**74%**
United Kingdom	37	15	47	7
German-Speaking Europe	10	27	2	41
Germany	6	16	1	28
Switzerland	2	6	<1	11
Austria	2	5	1	1
Netherlands	3	7	1	6
France	2	1	1	9
Italy	1	5	<1	<1
Spain	1	1	<1	1
Belgium	<1	1	-	2
Sweden	<1	1	-	<1
Russia	<1	1	-	-
Other Europe	9	11	8	7
Australia/New Zealand	**20%**	**9%**	**23%**	**21%**
Australia	17	5	21	11
New Zealand	3	4	2	10
Asia	**6%**	**13%**	**4%**	**<1%**
Japan	2	8	<1	<1
India	1	-	1	-
Korea	1	2	-	-
Taiwan	<1	2	<1	-
China	<1	<1	<1	-
Other Asia	2	1	3	-
Mexico	**5%**	**1%**	**6%**	**4%**
Other International	**7%**	**7%**	**7%**	**1%**

Party Size

Alaska visitors in the summer of 2006 reported an average party size of 2.4. (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 two, accounting for 60 percent of all parties. About one in five visitors (18 percent) traveled by themselves, and slightly more (22 percent) were in parties of three or more. Air visitors were more likely to travel by themselves, and less likely to travel in couples. Highway/ferry visitors were the most likely to be traveling in parties of three or more. Party size data over the years is provided in the Trends section.

Party Size[1]
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
One	18%	39%	7%	12%
Two	60	38	72	66
Three	7	8	5	10
Four	8	9	8	8
Five or more	7	6	8	3
Average party size	**2.4**	**2.1**	**2.5**	**2.3**

[1] Based to intercept respondents only.

Age and Gender

Alaska visitors reported an even gender split in the summer of 2006, with air visitors more likely to be male, and cruise visitors slightly more likely to be female. The average age reported was 51.6 years, ranging from 48.0 among air visitors, to 53.3 years among cruise visitors, to 52.5 years among highway/ferry visitors. Trends in age and gender data can be found in the Trends section.

Age and Gender
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Gender				
Male	50%	60%	44%	53%
Female	50	40	56	47
Age				
Under 18	6%	7%	6%	7%
18 to 24	3	5	2	4
25 to 34	7	10	6	7
35 to 44	10	15	8	9
45 to 54	22	22	23	15
55 to 64	28	23	31	24
65 and older	23	18	25	33
Average age	**51.6**	**48.0**	**53.3**	**52.5**

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

Household Characteristics

One-quarter of Alaska visitors in summer 2006 reported children living in their household. The number is slightly higher among air visitors (29 percent) and lower among highway/ferry visitors (14 percent). These variances reflect the slight differences in age among the travel markets.

Children Living In Household
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Children living in household	25%	29%	24%	14%
No children in household	74	71	75	85
Don't know	1	1	1	1

Four out of ten Alaska visitors reported that they were either retired or semi-retired, with highway/ferry visitors much more likely to fall into this category (59 percent). Air visitors were the least likely to be retired (29 percent).

Retired or Semi-Retired
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Retired or semi-retired	39%	29%	43%	59%
Not retired	60	70	56	41
Don't know	1	<1	1	1

About six in ten Alaska visitors in the summer of 2006 had graduated from college, including one-quarter who attained a higher degree. Air and cruise visitors showed similar levels of education, while highway/ferry visitors were less likely to be college graduates (50 percent).

Education
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Some high school	1%	1%	1%	2%
High school diploma/GED	13	11	14	18
Associate/technical degree	9	9	8	9
Some college	18	18	17	21
Graduated from college	33	33	33	29
Master's/Doctorate	26	27	26	21
Don't know	<1	<1	<1	<1

Summer 2006 visitors reported an average income of $103,000. Air and cruise visitors reported the same average income ($105,000), while highway/ferry visitors reported a lower average ($76,000). Trends in income levels can be found in the Trends section.

Household Income
By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Less than $25,000	3%	4%	2%	3%
$25,000 to $50,000	13	11	12	26
$50,000 to $75,000	17	17	16	19
$75,000 to $100,000	16	17	15	16
$100,000 to $125,000	12	12	13	8
$125,000 to $150,000	8	11	8	3
$150,000 to $200,000	7	8	7	3
Over $200,000	8	8	8	3
Refused	17	13	19	19
Average income	**$103,000**	**$105,000**	**$105,000**	**$76,000**

Expenditures Per Person

On average, visitors spent $934 per person while in Alaska. Considerable differences exist among the transportation markets. Air visitors had the highest per person average ($1,376), closely followed by highway/ferry visitors ($1,310). Cruise passengers spent an average of $636 per person (not including the price of their cruise or cruise/tour package).

It is important to note that this survey question captured in-state expenditures only, excluding the cost of transportation to and from the state. (Visitors traveling on Alaska Marine Highway were asked specifically about their ferry expenditures, and cruise visitors were asked for their cruise package price. Findings are reported on the following page.)

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

	All Visitors	Air	Cruise	Hwy/Ferry
Less than $500	48%	35%	57%	37%
$501 - $1,000	21	22	20	23
$1,001 - $2,500	15	24	9	23
$2,501 - $5,000	4	8	2	8
Over $5,000	1	3	<1	2
Don't know	10	7	12	6
Average per person, per trip	**$934**	**$1,376**	**$636**	**$1,310**
Average per person, per night	**$103**	**$146**	**$79**	**$70**

[1] Based to intercept respondents only.
Notes: Spending by cruise visitors excludes the price of their cruise or cruise/tour package. Spending on 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 tours and entertainment, averaging $188 per person. Retail purchases (including gifts and souvenirs) were the second largest category, at $177 per person. On average, visitors spent $150 per person on multi-day tour packages (not including cruises or cruise/tours).

Spending patterns were different for each market. Air visitors spent the most on multi-day tour packages ($453 per person). Cruise passenger spending was highest on tours and activities ($237 per person). Highway/ferry visitors spent an average of $209 per person in the food/beverage category as well cars/fuel/other instate transportation.

It is important to note that any lodging, transportation, and other expenses included in visitors' cruise/tour packages are not reflected in these totals. The survey captured passengers' *out-of-pocket* expenditures only (including pre-paid spending on shore excursions and other day tours). This distinction is important in considering the statewide impact of the cruise market. Twenty-two percent of the cruise market participated in cruise/tours (in-state land tours occurring before or after the cruise).

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 Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Lodging	$117	$289	$16	$174
Tours/activities/entertainment	188	115	237	103
Gifts/souvenirs/clothing	177	114	217	95
Food/beverage	97	188	40	209
Cars/fuel/transportation	68	157	8	209
Package not including cruise	150	453	*	*
Other	109	333	2	31

[1] Based to intercept respondents only.
* Sample size too small for analysis.
Notes: Spending by cruise visitors excludes the price of their cruise or cruise/tour package. Spending on ferry tickets to enter and exit the state is excluded.

Cruise and ferry passengers were asked additional questions about their respective transportation costs. On average, cruise passengers spent approximately $1,900 per person for their cruise or cruise/tour package (not including airfare).

Visitors that traveled onboard the Alaska Marine Highway spent an average of $551 per person for their ferry tickets. This includes expenditures on travel to and from Alaska, as well as between communities within the state.

Visitor Expenditures on Cruise Package and Ferry Tickets, Per Person[1]

	Cruise Visitors	Ferry Visitors
Average per person	$1,897	$551

[1] Based to intercept respondents only.
Note: Average cruise package price does not include airfare.

Total Expenditures

Visitors' out-of-pocket expenditures totaled $1.5 billion, excluding transportation costs to travel to and from Alaska. Air visitors' spending was the largest among the transportation markets ($809 million). Cruise passengers' out-of-pocket expenditures totaled slightly over $600 million (not including their cruise package); highway/ferry visitors represented $111 million in in-state spending (not including ferry tickets).

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

	All Visitors	Air	Cruise	Hwy/Ferry
Total in-state spending	$1,524	$809	$610	$111

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

Total spending on tours and activities totaled more than $300 million, closely followed by spending on gifts, souvenirs, and clothing. Total expenditures by the highway/ferry market naturally appear lower than other markets; despite their high per-person spending, they represent only 5 percent of the overall market.

Cruise packages were not included in the totals, below. 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.

Total Visitor Expenditures in Alaska, by Category in Millions of Dollars By Transportation Market

	All Visitors	Air	Cruise	Hwy/Ferry
Lodging	$191	$170	$15	$15
Tours/activities/entertainment	307	68	227	9
Gifts/souvenirs/clothing	289	67	208	8
Food/beverage	158	111	38	18
Cars/fuel/transportation	111	92	8	18
Package not including cruise	245	266	*	*
Other	178	196	2	3

* Sample size too small for analysis.
Note: Spending by cruise visitors excludes the price of their cruise or cruise/tour package. Spending on ferry tickets to enter and exit the state is excluded.

Detailed spending data by trip purpose (vacation/pleasure, visiting friends/relatives, and business) can be found in the Summary Profiles section.

Section V: Visitor Trends

Introduction

This section shows visitor survey data from Summer 2006 compared to survey data from the two previous AVSP generations: 2001 and 1993. 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 2001 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 2001 to 1-5 in 2006. Certain average statistics were not reported in 2001, 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, Summer 2001, prepared by Northern Economics

Alaska Visitor Expenditures and Opinions, Summer 2001, prepared by Northern Economics

Alaska Visitor Arrivals, Summer 1993, prepared by McDowell Group

Alaska Visitor Patterns, Opinions, and Planning, Summer 1993, prepared by McDowell Group

Alaska Visitor Expenditures, Summer 1993, prepared by McDowell Group

Trip Purpose and Transportation

The proportion of the visitor market traveling for vacation or pleasure has increased over the years, from 71 percent in 1993 to 82 percent in 2006. This is a direct reflection of the growth in the cruise ship market in comparison to other visitors – 99 percent of cruise ship passengers are vacation/pleasure visitors. The VFR (visiting friends/relatives) market has changed little over the years. The two business markets, business only and business and pleasure, decreased somewhat in relation to the other markets. However, their volume was essentially the same in 1993 and 2006.

Trip Purpose
Visitor Trends

	1993	2001	2006
Vacation/pleasure	71%	74%	82%
Visiting friends or relatives	11	6	9
Business only	10	15	5
Business and pleasure	7	5	4

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: The 1993 sample included an additional 2 percent who were seasonal workers.

The percentage of visitors entering the state by air has decreased over the years, while the percentage entering by cruise ship has increased dramatically. (The growth of the cruise ship market over the last decade is discussed on in the Visitor Volume section.) The portion of the market entering by highway has declined considerably, reflecting both a decrease in traffic and the growth of other markets. The ferry market, which shares some overlap with the highway market, has also declined in its share of visitors.

Mode of Exit for the entire market was not provided in 2001.

Mode of Entry
Visitor Trends

	1993	2001	2006
Air	53%	49%	45%
Cruise ship	29	43	49
Highway	15	7	4
Ferry	3	1	1

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

Length of Stay and Regions Visited

The average length of stay decreased only slightly between 1993 and 2006, from 10.2 to 9.1 nights. A more significant change is detectable in terms of ranges: the proportion staying more than two weeks fell from 22 percent in 1993 to 8 percent in 2006. This reflects the declining share of the market traveling by highway or ferry, who tend to stay much longer in the state.

Length of Stay in Alaska
Visitor Trends

	1993	2001	2006
Seven nights or less	47%	59%	59%
Eight to 14 nights	31	29	34
15 or more nights	22	12	8
Average number of nights	**10.2**	**n/a**	**9.1**

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 regional visitation data reflects changes in visitors' instate travel patterns. Changes can be attributed to numerous factors, including new product development, marketing efforts, and infrastructure development. To understand changes in actual visitation, the data must be viewed in light of total visitor volume for each period.

For example, Southeast attracted 71 percent of the 2006 summer market, resulting in an estimated 1,160,000 visitors. Data from AVSP III shows that Southeast attracted 60 percent of the 1993 summer market (520,000 out of 861,117). While the proportion of the market visiting Southeast increased moderately, from 60 to 71 percent, actual volume of visitation more than doubled.

Visitation to Southcentral dropped from 68 percent of the market in 1993 to 56 percent in 2006. However, when comparing actual volume, the region grew 56 percent – from 586,000 visitors in 1993 to 914,000 visitors in 2006.

Regions Visited
Visitor Trends

	1993	2001	2006
Southeast	60%	84%	71%
Southcentral	68	62	56
Denali	36	43	28
Interior/Northern	35	39	27
Southwest	6	17	3

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 data from AVSP IV (conducted by Northern Economics, 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 2001, many more visitors chose the higher ratings (40 percent at "7", and 33 percent at "6"). Only 6 percent chose the midpoint ("4"), which would logically correspond to the 2001 response "about what you expected" (chosen by 35 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 Scale: 1-7	2001 Scale: 1-7	2006 Scale: 1-5
Overall Alaska trip	6.1	6.3	4.7
Compared to expectations	5.7	6.0	3.8
Value for the money	5.3	5.4	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
Much higher than expectations	25%
Higher than expectations	36
About what you expected	35
Below expectations	4
Far below expectations	1
Average 1-5	**3.8**
	2001
7-Exceeded	40%
6	33
5	17
4	6
3	2
2	1
1-Below	<1
Average 1-7	**6.0**

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
Much better	13%
Better	25
About the same	48
Worse	12
Much worse	1
Average 1-5	**3.4**
	2001
7-Better	40%
6	33
5	17
4	6
3	2
2	1
1-Worse	<1
Average 1-7	**5.4**

Sources: 2001 data from AVSP IV (conducted by Northern Economics, Inc.).

The likelihood of recommending Alaska to others changed little between 2001 and 2006. The percentage "very likely" to recommend was 72 percent in 2001, and 79 percent in 2006. Likelihood of returning appears to have changed little, from 31 percent "very likely" in 2001 to 40 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
Very likely	79%
Likely	18
Unlikely	1
Very unlikely	<1
Don't know	1
	2001
7-Very likely	72%
6	16
5	6
4	3
3	1
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
Very likely	40%
Likely	22
Unlikely	19
Very unlikely	7
Don't know	11
	2001
7-Very likely	31%
6	13
5	12
4	10
3	5
2	6
1-Very unlikely	10
Don't know	13

Sources: 2001 data from AVSP IV (conducted by Northern Economics, Inc.).
Note: In 2001, the question regarding likelihood of returning specified "for vacation."

Previous Alaska Travel

The rate of repeat travel to Alaska remained virtually the same between 2001 and 2006. (In 1993, visitors were asked only about their Alaska travel in the previous five years.)

Previous Alaska Travel
Visitor Trends

	2001	2006
First trip to Alaska	65%	66%
Been to Alaska before	35	34

Sources: 2001 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. Although ranges were reported differently each year, a few statistics are comparable: the percentage making their Alaska travel decision within one month of their trip decreased from 12 percent in 1993 to 6 percent in 2001, remaining at 6 percent in 2006. Those booking in that same time frame fell from 21 percent in 1993 to 9 percent in 2006. The one year or more range for the trip decision accounted for 26 percent in 1993, 22 percent in 2001, and 28 percent in 2006. Although averages were not reported in 2001, a slight increase in the average trip planning time is apparent between 1993 and 2006.

Trip Planning Timeline
Visitor Trends

	2006 Trip Decision	2006 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	6%	9%
One to three months	16	25
Four to six months	28	33
Seven to 11 months	21	22
One year or more	28	9
Don't know	1	2
Average # of months	**8.1**	**5.4**
	2001	**2001**
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	6%	8%
1-2 months	8	15
3-4 months	12	20
5-6 months	21	24
7-11 months	28	24
1-2 years	18	4
More than 2 years	4	<1
Don't know	4	5
Average # of months	**n/a**	**n/a**
	1993	**1993**
Less than one month	12%	21%
2-3 months	19	31
4-5 months	9	12
6-7 months	21	21
8-9 months	9	8
10-11 months	4	2
1 year or more	26	4
Don't know	n/a	n/a
Average # of months	**7.2**	**4.4**

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 20 percent of visitors in 1993 and 19 percent in 2001; it was *received* by 15 percent in 2006. This slight drop is at least in part due to the decline in the highway/ferry market, which was twice as likely as other visitors to receive the Planner in 2006. It is also likely due to an increase in Internet usage, including the State travel website www.travelalaska.com. Travel agents were used by 53 percent of visitors in 1993 and 68 percent in 2001; 52 percent of visitors *booked* through travel agents in 2006. While travel agent usage by the cruise market has dropped recently due to other booking alternatives, overall usage has remained fairly consistent. The usage of friends/relatives and the Milepost for trip information stayed consistent between 2001 and 2006.

Trip Information Sources
Visitor Trends

	1993	2001	2006
State of Alaska Official Vacation Planner	20% Used	19% Used	15% Received
Travel agent	53% Used	68% Used	52% Booked
Travel guide/book	n/a	38%	13%
Friends/relatives	23%	44%	45%
Milepost	n/a	10%	8%

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

The share of Alaska visitors from the US has changed little over the AVSP generations, accounting for 83 percent in 1993 and 85 percent in 2006. The Canada market appears to have decreased slightly (perhaps relating to fewer highway visitors) while visitation from other international markets appears to have increased. Regional distribution of the US markets changed by only a few percentage points between 1993 and 2006 (this data was not reported in 2001).

Origin
Visitor Trends

	1993	2001	2006
United States	83%	86%	85%
Western US	37	n/a	39
Southern US	20	n/a	19
Eastern US	11	n/a	13
Midwestern US	16	n/a	13
Canada	10	10	6
Other International	6	4	9

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

Average party size grew slightly from 2.1 people in 1993 to 2.4 people in 2006. (The average party size was not reported in 2001.) Those traveling in couples, the largest share of the market, increased from 54 percent in 1993 to 60 percent in 2006. Individual travelers' share of the market fluctuated, from 29 percent to 36 percent to 18 percent. Gender distribution has stayed fairly evenly split throughout the generations of AVSP.

Party Size
Visitor Trends

	1993	2001	2006
One	29%	36%	18%
Two	54	51	60
Three	7	5	7
Four	7	5	8
Five or more	4	3	7
Average party size	**2.1**	**n/a**	**2.4**

Sources: 1993 data from AVSP III (conducted by McDowell Group, Inc.); 2001 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	2001	2006
Male	53%	52%	50%
Female	47	48	50

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

The average age of the Alaska visitor changed only slightly between 1993 and 2006, from 50.0 to 51.6 years. Those 65 and older accounted for one-quarter of visitors in both years. The youngest demographic (under 35) decreased slightly from 22 to 16 percent. The middle-aged market (45 to 64) increased from 38 percent in 1993 to 50 percent in 2006. (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	6%	6%
18 to 24	5	3
25 to 34	11	7
35 to 44	16	10
45 to 54	19	22
55 to 64	19	28
65 and older	25	23
Average age	**50.0**	**51.6**

Age, 2001
Visitor Trends

	2001
Under 21	6%
21-30	10
31-40	19
41-50	21
51-60	19
61 and older	25
Average age	**n/a**

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

The education levels of Alaska visitors appear to have increased somewhat between 1993 and 2006. College graduates accounted for 52 percent of visitors in 1993, and 59 percent of visitors in 2006. Those earning a high school diploma or less accounted for 24 percent in 1993, and 14 percent in 2006. (Education data was not reported in 2001.)

Education
Visitor Trends

	1993	2006
Some high school	4%	1%
High school diploma/GED	20	13
Associate/technical degree	n/a	9
Some college	24	18
Graduated from college	25	33
Master’s/Doctorate	27	26

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

Visitors' income levels increased by 70 percent between 1993 and 2006, likely reflecting the increased percentage of travelers between 45 and 64 as well as inflation. The difference in refusal rate on income between 2001 (44 percent) and 2006 (17 percent) makes it difficult to compare the two years.

Household Income
Visitor Trends

	1993	2001	2006
Less than $25,000	9%	3%	3%
$25,000 to $50,000	36	10	13
$50,000 to $75,000	25	16	17
$75,000 to $100,000	17	11	16
$100,000 and over	12	17	35
Refused	n/a	44	17
Average income	**$61,000**	**n/a**	**$104,000**

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

Average visitor expenditures grew 31 percent between 1993, when visitors spent an average of $714 per person, and 2006, when visitors spent an average of $934 per person. The largest expenditure category in both years was tours/recreation ($209 in 1993 and $188 in 2006). Per person spending on lodging decreased, from $139 per person in 1993 to $117 per person in 2006.

When visitor spending data is extrapolated to the entire market, overall spending exceeded $1.5 billion in 2006, similar to total visitor spending estimates for 2001. Instate spending nearly tripled between 1993 and 2006.

Visitor Expenditures in Alaska, Per Person, Overall
Visitor Trends

	1993	2001[1]	2006
Per person, per trip	$714	$1,258	$934

[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	$139	Lodging	$421	Lodging	$117
Food/beverage	94	Food/beverage	123	Food/beverage	97
Transportation	130	Transportation	166	Transportation	68
Tours/recreation	209	Recreation	182	Tours/recreation	188
Gifts/souvenirs	93	Gifts/souvenirs	119	Gifts/souvenirs/ clothing	177
Clothing	10	Clothing	58		
Personal	16	Personal	27	Package (not inc. cruise)	150
Other	24	Other	69	Other	109
		Alaska Native Arts & Crafts	92		

[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	$598	$1,513	$1,524

[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, 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 and 2001, visitors were asked to record their expenditures in a diary throughout their trip. In 1993, expenditures were recorded only for the individual completing the diary. In 2001, 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, the data was captured in a separate survey question. In prior years, this information was captured in the diary. This difference alone does not account for significant changes in spending, however. In total, Alaska Marine Highway passengers account for less than 2 percent of the total summer market.

Finally, response rates for 2001 were significantly lower than in 1993 or 2006. In 1993, the Visitor Expenditures Survey response rate was 55 percent; it dropped to 15 percent in 2001 (for a total sample size of 547). In 2006, of the 2,703 intercept respondents, 90 percent answered the statewide expenditure questions (for a total sample size of 2,431). The high response rate and large sample for 2006 lends confidence to the accuracy of the spending data in comparison to prior years.

Section VI: Selected Summary Profiles

Introduction

This section presents results of the visitor survey broken into 11 "Summary Profiles," representing over 50 different sub-groups. Results for each profile have been consolidated into nine tables, each table reflecting a chapter in the *Visitor Profile* section. Extra detail has been provided in several instances. Because analysis by Trip Purpose is particularly useful, this chapter contains more detail. The Alaska Regions and Communities chapters provide extra details on activities and expenditures based on what was done and spent in each particular region and community.

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
Trip Purpose	Vacation/Pleasure, Visiting Friends/Relatives, Business Only or Business/Pleasure
Highway and Ferry Users	Highway, Ferry
US Regions & Canada	Western US, Midwest US, Southern US, Eastern US, Canada
International	All international, Europe, GSE (German-Speaking Europe), Australia/New Zealand, Asia
Alaska Regions	Southcentral, Southeast, Interior, Southwest, Far North
Southcentral Communities	Southcentral, Anchorage, Seward, Whittier, Talkeetna, Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, Valdez
Southeast Communities	Southeast, Juneau, Ketchikan, Skagway, Sitka, Glacier Bay, Gustavus, Haines, Hoonah, Petersburg, Wrangell
Interior Communities	Interior, Denali, Fairbanks, Tok, Glennallen
Southwest and Far North Communities	Southwest, Kodiak, Far North, Nome
Sportfishing	Guided Sportfishing, Unguided Sportfishing
Selected Visitor Markets	Adventure, B&B, Independent Cruisers, Native Culture, Repeat Visitors

Summary Profile: Trip Purpose

In this chapter, the overall market is segmented by trip purpose. Four out of five visitors in 2006 were traveling primarily for vacation/pleasure. Those visiting friends and relatives (VFRs) accounted for 9 percent, while business-related travel accounted for an additional 9 percent. Definitions for each of these markets and sample sizes are provided in the table below.

Market Definition and Sample Size
Trip Purpose

Market	Definition	Sample Size	Maximum Margin of Error
Vacation/pleasure	Main purpose of trip is vacation or pleasure	4,289	±1.6%
Visiting friends/ relatives	Main purpose of trip is to visit friends or relatives	730	3.7
Business only/ business and pleasure	Main purpose of trip is business only or business and pleasure	640	4.0

Vacation/pleasure visitors, VFRs and business travelers differ from each other in many important ways.

- Eighty-two percent of vacation/pleasure visitors purchased a multi-day tour package, compared to 69 percent of the overall market. Relatively few VFRs and business travelers purchased tour packages (6 percent and 10 percent, respectively).
- VFRs predominantly used personal vehicles (52 percent) to travel between Alaskan communities. Business travelers were the most likely to use rental vehicles (40 percent vs. 14 percent for the overall market). Vacation/pleasure visitors reported the highest usage of motorcoach and train travel.
- VFRs had the longest stay in Alaska (12.0 nights). Not surprisingly, three-quarters stayed in a private home during their trip. Business travelers spent an average of 8.7 nights in Alaska and stayed predominately in hotels. Vacation/pleasure visitors' average length of stay was 8.8 nights; their leading accommodation choices were cruise ships, hotels and lodges.
- Seven out of ten vacation/pleasure visitors overnighted on a cruise ship, compared to 2 percent of VFR's and 6 percent of business-related visitors.
- Destinations within Alaska varied considerably by trip purpose. Eighty-two percent of vacation/pleasure visitors experienced Southeast, half visited Southcentral, and a third visited the Interior. In contrast, VFRs and business travelers were significantly more likely to visit Southcentral Alaska, and only one in five visited Southeast. Visitation to Southwest and Far North was similarly low among all markets.
- When focusing on overnight visitation among travel markets, Southcentral becomes the leading region. Three-quarters of VFRs and business travelers spent at least one night in Southcentral. Among vacation/pleasure visitors, 44 percent overnighted in Southcentral. Overnight visitation to the Interior

was highest among vacation/pleasure visitors (33 percent) and lowest among business travelers (22 percent). Overnight visitation in Southeast communities was similar among all markets, ranging from 10 to 15 percent.

- The most popular activities among vacation/pleasure visitors included shopping, wildlife viewing, cultural activities, and sightseeing tours. Similarly, VFRs participated in shopping, wildlife viewing, and cultural activities. VFRs were much more likely to participate in hiking/nature walks than other markets.
- VFRs were most likely to be repeat travelers, the most likely to return to Alaska in the next five years, and reported the highest number of previous trips. Business travelers also reported high rates of repeat and anticipated future Alaska travel. Both markets traveled predominately by air on their last trip.
- One in three vacation/pleasure visitors said they were very likely to return to Alaska in the next five years. Seventy-nine percent said they were very likely to recommend Alaska to others. Vacation/pleasure visitors that had been to Alaska previously averaged 3.0 prior vacation trips.
- Vacation/pleasure visitors reported the longest advance travel decision and booking times (8.9 months and 6.1 months respectively). Business travelers reported the shortest lead times: 3.7 months for trip decision and 1.9 months for booking major travel arrangements.
- Internet usage, including booking, was highest among VFRs. Travel components most frequently booked over the Internet among all visitors were airfare, tours, and lodging. Business travelers frequently booked rental cars online as well. Usage of the official State travel website was highest among vacation/pleasure visitors.
- Vacation/pleasure visitors reported the highest usage of travel agents and the State Vacation Planner. Other leading information sources for vacation/pleasure visitors included cruise line/tour company, friends and family, and brochures.
- VFRs predominately relied on friends and family and their prior travel experience to plan their trip. Business travelers were the most likely to report that they did not use any information sources (23 percent); prior experience was the most frequently-cited information source, followed by friends and family.
- Six of ten business travelers and VFRs were from Western US states. While Western US was the leading origin for vacation/pleasure visitors (34 percent), this market drew more heavily than the VFRs or business markets from other US regions and international countries.
- Vacation/pleasure visitors reported the largest party size (2.5), the highest average age (52.4) and a relatively even gender split.
- The average party size for VFRs was 2.0. They were more likely to be female, and reported the lowest average household incomes ($80,000).
- Business travelers traveled alone more frequently than other markets (average party size of 1.7), they were much more likely to be male, young (average age was 44.8 years old), and the most likely to

have children at home (44 percent). Business travelers also reported the highest average household incomes ($116,000) and the highest percentage of college graduates (69 percent).

- Average instate expenditures were highest among business travelers ($1,156 per person) and lowest among VFRs ($729 per person). Vacation pleasure visitors spent an average of $935 per person in Alaska. All expenditure averages exclude transportation to and from Alaska, such as plane tickets, cruise packages and ferry tickets.

Packages
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Purchased multi-day package				
Yes	69%	82%	6%	10%
Type of Package (Base: non-cruise; purchased package)				
Fishing lodge package	46%	48%	*	*
Adventure tour	14	14	*	*
Wilderness lodge package	13	14	*	*
Rail package	9	7	*	*
Motorcoach tour	5	4	*	*
Other	12	13	*	*

* Sample size too small for analysis.

Transportation Modes
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Mode of Entry into Alaska				
Air	49%	40%	92%	90%
Cruise	45	54	1	6
Highway	4	4	5	2
Ferry	1	1	1	1
Mode of Exit from Alaska				
Air	49%	39%	95%	92%
Cruise	47	57	<1	6
Highway	4	4	4	2
Ferry	1	1	1	<1
Used to Travel Between Communities[1]				
Motorcoach/bus	26%	31%	5%	7%
Train	19	22	7	3
Rental vehicle	14	11	16	40
Air	12	10	19	19
Personal vehicle	9	4	52	5
State ferry	3	3	5	2
Rental RV	2	2	1	-
Personal RV	2	2	3	1
None of the above	40	44	17	36
Don't know/refused	1	1	1	1

[1] Based to intercept respondents only.

Length of Stay & Lodging Type
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Average length of stay in Alaska	9.1 nights	8.8 nights	12.0 nights	8.7 nights
Lodging Types Used				
Cruise ship	60%	72%	2%	6%
Hotel/motel	42	39	32	79
Lodge	19	22	7	6
Private home	12	5	77	10
B&B	6	6	8	5
Commercial campground	4	4	4	3
State/national campground	3	3	5	1
Wilderness camping	2	2	4	2
Other	7	6	10	12

Destinations Visited
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Southeast	**71%**	**82%**	**18%**	**21%**
Juneau	63	75	9	14
Ketchikan	53	63	7	11
Skagway	53	64	3	7
Glacier Bay/Gustavus	27	31	3	4
Sitka	18	20	4	4
Hoonah/Icy Strait Point	11	13	1	3
Haines	8	9	2	1
Wrangell	2	2	1	2
Petersburg	2	2	1	1
Prince of Wales Island	1	1	1	1
Other Southeast	6	7	2	1
Southcentral	**56%**	**51%**	**78%**	**76%**
Anchorage	50	45	67	74
Kenai Peninsula	27	25	43	26
Seward	21	21	27	17
Kenai/Soldotna	11	9	22	13
Homer	9	8	20	8
Other Kenai Peninsula	5	4	9	4
Whittier	14	15	12	11
Talkeetna	13	14	10	6
Palmer/Wasilla	9	6	24	11
Girdwood/Alyeska	8	7	18	14
Prince William Sound	6	7	4	4
Portage	6	5	12	9
Valdez	4	4	6	2
Other Southcentral	4	4	9	5
Interior	**33%**	**34%**	**30%**	**27%**
Denali	28	31	17	10
Fairbanks	24	24	20	20
Tok	5	5	4	2
Glennallen	4	4	4	3
Other Interior	4	3	5	5
Southwest	**3%**	**3%**	**6%**	**5%**
Kodiak	1	1	3	2
Other Southwest	2	2	4	4
Far North	**3%**	**3%**	**3%**	**5%**
Nome	1	1	1	1
Other Far North	2	2	2	5

Overnight Destinations
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Southcentral	**49%**	**44%**	**74%**	**74%**
Anchorage	41	37	52	67
Kenai Peninsula	18	16	33	13
Seward	10	10	12	5
Homer	6	6	11	3
Kenai/Soldotna	6	5	12	6
Other Kenai Peninsula	3	3	5	2
Talkeetna	7	8	3	3
Palmer/Wasilla	4	3	12	4
Valdez	4	3	5	2
Girdwood/Alyeska	2	2	2	3
Whittier	1	2	1	<1
Prince William Sound	1	1	<1	<1
Portage	1	1	<1	<1
Other Southcentral	2	2	5	3
Interior	**32%**	**33%**	**27%**	**22%**
Denali	25	30	10	6
Fairbanks	23	24	18	17
Tok	4	4	2	1
Glennallen	2	2	2	1
Other Interior	2	2	3	3
Southeast	**11%**	**10%**	**15%**	**12%**
Juneau	4	4	6	6
Skagway	3	3	1	<1
Ketchikan	3	2	4	5
Sitka	2	2	2	2
Haines	1	1	1	1
Prince of Wales Island	1	1	1	1
Petersburg	1	1	1	1
Glacier Bay/Gustavus	1	1	1	<1
Wrangell	1	<1	<1	1
Hoonah/Icy Strait Point	<1	<1	<1	<1
Other Southeast	1	1	1	1
Southwest	**3%**	**2%**	**6%**	**5%**
Kodiak	1	1	3	2
Other Southwest	2	1	3	4
Far North	**2%**	**1%**	**1%**	**4%**
Nome	<1	<1	<1	1
Other Far North	1	1	1	3

Visitor Activities[1]
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Shopping	71%	74%	66%	44%
Wildlife viewing	56	59	53	28
Birdwatching	19	20	20	8
Cultural activities	49	53	41	21
Museums	28	30	30	14
Native cultural tours/activities	20	23	11	5
Historical/cultural attractions	18	20	16	6
Gold panning	15	18	3	4
City/sightseeing tours	44	51	15	18
Train	38	45	9	6
White Pass/Yukon Route	27	33	3	2
Alaska Railroad	16	19	7	3
Hiking/nature walk	30	29	42	22
Fishing	20	18	36	15
Fishing guided	13	14	11	7
Fishing unguided	8	6	28	8
Visiting friends/relatives	17	7	93	10
Flightseeing	15	17	5	4
Salmon bake	12	14	4	2
Tramway/gondola	12	13	6	2
Shows/Alaska entertainment	10	11	8	2
Business	8	<1	<1	86
Dog sledding	7	9	3	2
Camping	7	7	13	5
Rafting	5	6	2	1
Kaking/canoeing	5	5	3	2
Biking	3	2	4	2
Northern Lights viewing	1	1	2	2
Hunting	1	1	<1	<1
Other	7	8	8	4

[1] Based to intercept respondents only.

Satisfaction Ratings
By Trip Purpose

	All Visitors		Vacation/ Pleasure		Visiting Friends/ Relatives		Business Only/ Business & Pleasure	
Compared to expectations								
Much higher	25%		26%		19%		26%	
Higher	36		36		32		37	
About as expected	35		34		45		35	
Value for the money, compared to other destinations								
Much better	13%		13%		14%		11%	
Better	25		25		22		33	
About the same	48		48		51		44	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)								
Overall experience in Alaska	70%	4.7	71%	4.7	71%	4.7	60%	4.6
Accommodations	54	4.4	55	4.5	59	4.5	38	4.1
Restaurants	42	4.2	42	4.2	43	4.2	39	4.2
Shopping	29	4.0	29	4.0	34	4.1	24	3.9
Visitor information services	53	4.4	53	4.4	56	4.4	49	4.3
Sightseeing	66	4.6	66	4.6	70	4.6	63	4.6
Tours and activities	60	4.5	60	4.5	60	4.5	56	4.4
Wildlife viewing	50	4.2	50	4.2	55	4.4	50	4.3
Transportation within Alaska	45	4.3	47	4.3	42	4.2	32	4.1
Friendliness of residents	69	4.6	70	4.6	69	4.6	57	4.5
Value for the money	32	4.1	33	4.1	35	4.1	25	3.9
Very likely to recommend Alaska as a vacation destination	79%		79%		83%		71%	
Very likely to return to Alaska in the next five years	40%		33%		76%		73%	

Previous Alaska Travel
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Been to Alaska before for vacation	34%	27%	68%	65%
Average # of vacation trips (base: repeat travelers)	3.4	3.0	5.5	2.8
Previous mode of transportation used to enter/exit Alaska				
Air	72%	63%	92%	87%
Cruise	26	37	4	11
Highway	11	13	8	4
Ferry	3	3	2	2

Trip Planning
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Ave. # of months, trip decision	8.1	8.9	6.2	3.7
Ave. # of months, trip booking	5.4	6.1	2.9	1.9
Used Internet[1]	68%	68%	73%	65%
Booked over Internet[1]	42	39	63	47
Airfare	30	25	61	42
Lodging	12	10	12	27
Tours	15	17	5	3
Vehicle rental	7	5	7	20
Cruise	11	14	2	-
Ferry	1	1	2	<1
Overnight packages	1	1	<1	<1
Used www.travelalaska.com[1]	23	25	16	10
Booked through travel agent[1]	52	59	13	39
Received State Vacation Planner[1]	15	16	9	6
Other Sources[1]				
Friends/family	45%	43%	84%	23%
Cruise line/tour company	38	46	3	6
Prior experience	26	20	50	45
Brochures (net)	25	27	16	15
Community brochures	3	2	4	2
Ferry brochure/schedule	2	2	2	1
AAA	16	18	9	5
Travel guide/book	13	15	5	5
Television	11	13	5	6
Magazine	8	9	8	3
Milepost	6	5	11	3
Convention & Visitors Bureau(s)	5	5	7	7
Club/organization	4	4	2	8
Hotel/lodge	4	4	3	6
Library	3	4	<1	2
Newspaper	3	2	7	1
North to Alaska guide	2	2	1	2
Travel/recreation exhibits	1	1	2	1
Other	2	1	1	4
None	8	7	3	23
Don't know	1	1	1	<1

[1] Based to intercept respondents only.

Demographics
By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Origin				
Western US	39%	34%	58%	62%
Southern US	19	20	15	16
Eastern US	13	14	9	7
Midwestern US	13	14	13	7
Canada	6	7	2	3
Other International	9	11	4	4
Other Demographics				
Average party size[1]	2.4	2.5	2.0	1.7
Male/female	50/50	49/51	44/56	68/32
Average age	51.6	52.4	49.4	44.8
Children in household	25%	23%	20%	44%
Retired/semi-retired	39	42	42	11
College graduate	59	59	51	69
Average income	$103,000	$105,000	$80,000	$116,000

[1] Based to intercept respondents only.

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

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Less than $500	48%	48%	55%	40%
$501 - $1,000	21	20	22	26
$1,001 - $2,500	15	14	13	19
$2,501 - $5,000	4	5	2	4
Over $5,000	1	1	1	3
Don't know	10	11	6	7
Average per person, per trip	**$934**	**$935**	**$729**	**$1,156**
Average per person, per night	**$103**	**$106**	**$61**	**$133**

[1] Based to intercept respondents only.
Notes: Spending by cruise visitors excludes the price of their cruise or cruise/tour package. Spending on ferry tickets to enter and exit the state is excluded.

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

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Lodging	$117	$66	$104	$494
Tours/activities/entertainment	188	227	80	50
Gifts/souvenirs/clothing	177	194	138	78
Food/beverage	97	71	171	216
Cars/fuel/transportation	68	50	84	182
Package not including cruise	150	176	25	28
Other	109	107	56	193

[1] Based to intercept respondents only.
Note: Spending by cruise visitors excludes the price of their cruise or cruisetour package. Spending on ferry tickets to enter and exit the state is also excluded.

Visitor Expenditures on Cruise Package and Ferry Tickets, Per Person[1]

	Cruise Visitors	Ferry Visitors
Average per person	$1,897	$551

[1] Based to intercept respondents only.
Note: Average cruise package price does not include airfare.

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

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Total in-state spending	$1,523.8	$1,251.0	$106.1	$171.0

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

Total Visitor Expenditures in Alaska, by Category
in Millions of Dollars
By Transportation Market

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Lodging	$190.9	$88.3	$15.1	$73.1
Tours/activities/entertainment	306.7	303.7	11.6	7.4
Gifts/souvenirs/clothing	288.8	259.6	20.1	11.5
Food/beverage	158.3	95.0	24.9	31.9
Cars/fuel/transportation	110.9	66.9	12.2	26.9
Package not including cruise	244.7	235.5	3.6	4.1
Other	177.8	143.2	8.2	28.5

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

Summary Profile: Highway and Ferry

The highway and ferry markets are profiled separately in this chapter. Definitions and sample sizes are provided in the table below.

Market Definition and Sample Size
Highway and Ferry

Market	Definition	Sample Size	Maximum Margin of Error
Highway	Entered or exited Alaska via highway	508	±4.5%
Ferry	Entered or exited Alaska via ferry, or used the ferry to travel between Alaska communities	660	3.9

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

- The vast majority arrived and exited Alaska by highway, a sharp contrast with the high rate of cruise and air travel among all visitors. While in Alaska, they tended to travel by vehicle, RV, and ferry.
- The highway market spent an average of 19 nights in Alaska, more than twice the average length of stay for all visitors. Highway visitors experienced Interior and Southcentral communities at much higher rates than the overall market; in contrast, they reported much lower visitation for Southeast communities.
- Highway visitors were more likely to fish and visit museums than the overall market; they were less likely to shop or purchase tours. They reported higher satisfaction ratings for visitor information services and lower ratings for accommodations, restaurants, and instate transportation.
- Over half of highway visitors had been to Alaska previously (repeaters averaged 5.3 Alaska vacations). They made their decision to travel to Alaska farther in advance (average of 9.8 months), but tended to book major travel arrangements half as far in advance as the overall market. While they were less likely to book travel through the Internet or a travel agent, 57 percent reported using the Internet when planning their trip.
- Highway visitors were predominately from Western US states (28 percent) and Canada (26 percent). Sixty-one percent were retired or semi-retired, which was reflected in the average household income of $77,000.

For this analysis, ferry visitors included any visitor that used the State ferry to enter Alaska, exit Alaska, and/or used it to travel between communities. This comprehensive definition of the ferry market includes many visitors that entered and/or exited Alaska by air (48 percent for each).

- The ferry market reported an average length of stay in Alaska of 15.7 nights, nearly twice the average length among the overall market.

- They reported very high visitation to Southeast compared to the overall market. Ferry visitors also traveled to Anchorage, Denali and Seward more frequently than the overall market.
- Three-quarters of ferry visitors participated in shopping and wildlife viewing. They were more likely than the overall market to experience many activities including day cruises, hiking/nature walk, and museums.
- While they were more likely to give high ratings to wildlife viewing, they rated accommodations and restaurants lower than the overall market.
- Forty-one percent of ferry visitors had been to Alaska before; repeat travelers averaged 4.3 Alaska vacations.
- Internet usage and booking was higher than the overall market, while travel agent bookings were lower. Ferry visitors reported much higher usage of brochures, travel guides/books, and the Milepost than the overall market.
- Forty percent of ferry visitors were from the Western US. Twenty-five percent were from Canada and other international countries.

Trip Purpose and Packages
Highway and Ferry Users

	All Visitors	Highway	Ferry
Trip Purpose			
Vacation/pleasure	82%	83%	84%
Visiting friends or relatives	9	10	10
Business	5	2	1
Business and pleasure	4	5	5
Purchased multi-day package			
Yes	69%	10%	36%
Package type (Base: non-cruise, purchased package)			
Fishing lodge package	46%	*	17%
Adventure tour	14	*	21
Wilderness lodge package	13	*	18
Rail package	9	*	10
Motorcoach tour	5	*	6
Other	12	*	28

* Sample size too small for analysis.

Transportation Modes
Highway and Ferry Users

	All Visitors	Highway	Ferry
Mode of Entry into Alaska			
Air	49%	5%	48%
Cruise	45	5	19
Highway	4	89	22
Ferry	1	<1	11
Mode of Exit from Alaska			
Air	49%	12%	48%
Cruise	47	2	15
Highway	4	81	21
Ferry	1	5	16
Used to Travel Between Communities[1]			
Motorcoach/bus	26%	4%	16%
Train	19	5	20
Rental vehicle	14	9	23
Air	12	5	24
Personal vehicle	9	33	18
State ferry	3	21	92
Rental RV	2	5	5
Personal RV	2	29	5
None of the above	40	5	4
Don't know/refused	1	7	<1

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

Length of Stay, Destinations & Lodging Type
Highway and Ferry Users

	All Visitors	Highway	Ferry
Average length of stay in Alaska	9.1 nights	19.0 nights	15.7 nights
Regions Visited			
Southeast	71%	59%	86%
Southcentral	56	75	63
Interior	33	77	57
Southwest	3	2	6
Far North	3	7	9
Destinations Visited, Top 10			
Juneau	63%	19%	55%
Ketchikan	53	14	46
Skagway	53	43	52
Anchorage	50	64	58
Denali	28	50	44
Glacier Bay/Gustavus	27	12	15
Fairbanks	24	55	39
Seward	21	40	36
Sitka	18	7	21
Whittier	14	19	29
Lodging Types Used			
Cruise ship	60%	6%	12%
Hotel/motel	42	36	62
Lodge	19	7	22
Private home	12	20	18
B&B	6	7	21
Commercial campground	4	48	20
State/national campground	3	28	14
Wilderness camping	2	11	6
Other	7	13	16

Visitor Activities – Top 10[1]
Highway and Ferry Users

	All Visitors	Highway	Ferry
Shopping	71%	57%	75%
Wildlife viewing	53	44	74
City/sightseeing tours	44	23	34
Day cruises	40	33	56
Train	38	12	27
Hiking/nature walk	30	30	47
Museums	28	45	55
Native cultural tours/activities	20	7	23
Fishing	20	35	29
Historical/cultural attractions	18	13	27

[1] Based to intercept respondents only.

Satisfaction Ratings
Highway and Ferry Users

	All Visitors		Highway		Ferry	
Compared to expectations						
Much higher	25%		29%		28%	
Higher	36		32		34	
About as expected	35		34		37	
Value for the money, compared to other destinations						
Much better	13%		14%		19%	
Better	25		21		18	
About the same	48		48		49	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
Overall experience in Alaska	70%	4.7	64%	4.6	74%	4.7
Accommodations	54	4.4	39	4.2	36	4.2
Restaurants	42	4.2	36	4.1	23	3.9
Shopping	29	4.0	31	4.1	20	3.9
Visitor information services	53	4.4	61	4.5	54	4.4
Sightseeing	66	4.6	64	4.6	65	4.6
Tours and activities	60	4.5	58	4.5	60	4.5
Wildlife viewing	50	4.2	55	4.3	61	4.4
Transportation within Alaska	45	4.3	22	3.8	42	4.2
Friendliness of residents	69	4.6	69	4.6	69	4.6
Value for the money	32	4.1	27	3.9	23	3.9
Very likely to recommend Alaska as a vacation destination	79%		76%		76%	
Very likely to return to Alaska in the next five years	40%		45%		45%	

Previous Alaska Travel
Highway and Ferry Users

	All Visitors	Highway	Ferry
Been to Alaska before for vacation	34%	51%	41%
Average # of vacation trips (base: repeat travelers)	3.4	5.3	4.3
Previous mode of transportation used to enter/exit Alaska			
Air	72%	26%	59%
Cruise	26	15	12
Highway	11	64	27
Ferry	3	3	13

Trip Planning
Highway and Ferry Users

	All Visitors	Highway	Ferry
Ave. # of months, trip decision	8.1	9.8	9.2
Ave. # of months, trip booking	5.4	2.7	4.6
Used Internet[1]	68%	57%	78%
Booked over Internet[1]	42	27	52
Booked through travel agent[1]	52	9	25
Other Sources – Top 10[1]			
Friends/family	45%	30%	41%
Cruise line/tour company	38	3	14
Prior experience	26	13	29
Brochures	25	30	47
AAA	16	19	19
Travel guide/book	13	19	25
Television	11	4	8
Magazine	8	7	6
Milepost	6	41	29
Convention & Visitors Bureaus	5	16	16

[1] Based to intercept respondents only.

Demographics
Highway and Ferry Users

	All Visitors	Highway	Ferry
Origin			
Western US	39%	28%	40%
Southern US	19	16	12
Eastern US	13	5	13
Midwestern US	13	15	11
Canada	6	26	7
Other International	9	10	18
Other Demographics			
Average party size[1]	2.4	2.3	2.4
Male/female	50/50	54/46	50/50
Average age	51.6	53.0	50.9
Children in household	25%	14%	19%
Retired/semi-retired	39	61	45
College graduate	59	48	63
Average income	$103,000	$77,000	$109,000

[1] Based to intercept respondents only.

Summary Profile: US Regions & Canada

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

Market Definition and Sample Size
US Regions & Canada

Market	Definition	Sample Size	Maximum Margin of Error
Western US	From Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, or Wyoming	2,092	±2.2%
Midwest US	From Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, or Wisconsin	848	3.4
Southern US	From Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, or Virginia	1,110	3.0
Eastern US	From Connecticut, Delaware, Maine, Massachusetts, Maryland, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington, D.C, or West Virginia	601	4.1
Canada	From Canada	304	5.8

Visitors from Western US states have several distinguishing features when compared to other Northern American regions and the market as a whole.

- The region produced the highest percentage of VFRs (13 percent) when compared to other regions.
- Western US visitors reported the highest rate of repeat Alaska travel, with 49 percent having visited previously. They were also the most likely to return to Alaska for vacation within the next five years (53 percent very likely).
- While they were less likely to purchase a multi-day vacation package than the overall market (58 vs. 69 percent, respectively), they purchased sportfishing packages at much higher rates than other visitors.
- Western US visitors reported shorter trip decision and booking lead times than visitors from other US regions.

Visitors from Midwest US states differed from the overall market and other US regions in several ways.

- They reported the longest average length stay in Alaska (9.7 nights).
- While visitation to Southeast was typical in comparison to the overall market (70 percent), Midwest visitors were more likely to visit Southcentral and the Interior.

- Midwest visitors reported higher-than-average participation in various tour packages (with the exception of sportfishing). They traveled between communities by motorcoach and train at higher rates as well.

- They reported the longest advance time for deciding to travel to Alaska (9.2 months).

Southern US visitors differed from other US regions and the overall market in several ways.

- They were more likely to purchase multi-day tour packages. This was also reflected by their higher-than-average use of motorcoach and rail travel throughout Alaska.

- With an average of 9.7 nights in Alaska, Southern US visitors were slightly more likely than the overall market to visit Southeast, Southcentral, and Interior Alaska.

- Southern US visitors were the most likely to have cruised to Alaska on their previous trip, the most likely to have used the Internet to plan their current trip, and the most likely to be retired or semi-retired.

Eastern US visitors were the most likely to purchase multi-day tour packages when compared to other North American visitors. Other distinguishing aspects include:

- The average trip length was 9.7 nights, compared to 9.1 for the overall market.

- They were the most likely to visit the Interior (48 percent), reflective of their higher-than-average visitation to Denali (44 percent) and Fairbanks (37 percent).

- Eastern US visitors reported longer-than-average trip decision and booking times (9.0 months and 6.5 months, respectively).

- They reported the highest average household incomes ($111,000) and the highest percentage of college graduates (65 percent).

Canadian visitors were most likely to be traveling for vacation/pleasure (93 percent). Other unique aspects about this market include:

- Three-quarters of Canadian visitors overnighted on a cruise ship. They were more likely than US visitors to enter and exit Alaska by highway (approximately 20 percent).

- They reported the shortest average trip length at 6.9 nights. They visited Southeast more frequently than visitors from US regions, and were less likely to visit Southcentral or the Interior.

- Canadian visitors had the shortest lead time for deciding to travel to Alaska and for booking major travel arrangements (7.0 months and 4.4 months, respectively).

- They reported the lowest average household income and the highest percentage of female travelers.

Trip Purpose & Packages
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Trip Purpose						
Vacation/pleasure	82%	72%	86%	86%	89%	93%
Visiting friends/rel.	9	13	9	7	6	3
Business only	5	9	1	4	2	3
Business/pleasure	4	5	4	4	3	2
Purchased multi-day package						
Yes	69%	58%	71%	76%	78%	75%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	65%	28%	37%	27%	43%
Adventure tour	14	9	20	18	18	33
Wilderness lodge	13	7	19	17	20	16
Rail package	9	6	13	13	12	1
Motorcoach tour	5	3	9	3	3	6
Other	12	9	11	12	20	-

Transportation Modes
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Mode of Entry into Alaska						
Air	49%	55%	53%	47%	60%	15%
Cruise	45	40	41	49	38	63
Highway	4	3	5	4	1	20
Ferry	1	1	<1	<1	<1	1
Mode of Exit from Alaska						
Air	49%	58%	49%	48%	43%	17%
Cruise	47	38	46	48	55	63
Highway	4	3	4	3	1	19
Ferry	1	1	1	<1	<1	1
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	17%	41%	35%	33%	22%
Train	19	11	32	25	30	13
Rental vehicle	14	16	13	16	13	7
Air	12	13	11	11	13	6
Personal vehicle	9	12	9	7	6	6
State ferry	3	4	2	1	3	6
Rental RV	2	1	3	2	<1	-
Personal RV	2	2	2	2	1	4
None of the above	40	43	28	33	39	54
Don't know/refused	1	1	<1	<1	<1	3

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

Length of Stay, Destinations & Lodging Type
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average length of stay in Alaska	9.1 nights	8.8 nights	9.7 nights	9.7 nights	9.7 nights	6.9 nights
Regions Visited						
Southeast	71%	63%	70%	75%	78%	87%
Southcentral	56	54	65	61	63	32
Interior	33	23	45	39	48	22
Southwest	3	5	1	2	4	1
Far North	3	2	4	3	4	<1
Destinations Visited, Top 10						
Juneau	63%	53%	63%	69%	72%	75%
Ketchikan	53	43	55	59	63	62
Skagway	53	39	55	56	61	79
Anchorage	50	49	56	56	57	27
Denali	28	18	40	34	44	14
Glacier Bay/Gustavus	27	23	26	30	36	24
Fairbanks	24	16	33	29	37	13
Seward	21	18	25	26	26	13
Sitka	18	18	18	22	17	11
Whittier	14	12	21	16	16	8
Lodging Types Used						
Cruise ship	60%	48%	61%	67%	70%	75%
Hotel/motel	42	41	46	44	54	18
Lodge	19	14	26	23	29	9
Private home	12	17	13	9	7	4
B&B	6	6	7	5	6	6
Comm. campground	4	4	6	3	2	7
State/nat'l campground	3	3	4	3	2	6
Wilderness camping	2	2	2	1	2	3
Other	7	7	7	7	6	5

Activities – Top 10[1]
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Shopping	71%	64%	76%	77%	74%	74%
Wildlife viewing	53	49	66	60	63	43
City/sightseeing tours	44	37	51	46	52	54
Day cruises	40	28	50	49	50	32
Train	38	27	44	41	51	45
Hiking/nature walk	30	28	33	29	34	27
Museums	28	24	28	28	38	26
Native cultural tours/act.	20	16	28	22	27	12
Fishing	20	26	22	16	16	11
Hist./cult. attractions	18	17	23	19	20	11

[1] Based to intercept respondents only.

Satisfaction Ratings
US Regions & Canada

	All Visitors		Western US		Midwest US		Southern US		Eastern US		Canada	
Compared to expectations												
Much higher	25%		22%		24%		29%		28%		19%	
Higher	36		34		40		35		37		35	
About as expected	35		40		33		32		29		41	
Value for the money, compared to other destinations												
Much better	13%		14%		10%		15%		14%		8%	
Better	25		27		26		24		23		29	
About the same	48		47		49		47		49		55	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	70%	4.7	68%	4.6	74%	4.7	72%	4.7	76%	4.7	62%	4.6
Accommodations	54	4.4	52	4.4	55	4.5	56	4.4	55	4.5	54	4.5
Restaurants	42	4.2	41	4.2	42	4.3	42	4.2	42	4.3	48	4.3
Shopping	29	4.0	30	4.0	26	4.0	33	4.1	30	4.0	27	3.9
Visitor information services	53	4.4	51	4.4	55	4.5	54	4.4	56	4.5	47	4.4
Sightseeing	66	4.6	63	4.6	72	4.7	68	4.6	70	4.6	55	4.5
Tours and activities	60	4.5	57	4.4	64	4.6	62	4.6	65	4.6	52	4.4
Wildlife viewing	50	4.2	49	4.2	54	4.3	52	4.2	56	4.3	37	4.1
Transportation within Alaska	45	4.3	41	4.2	47	4.3	48	4.3	54	4.4	40	4.2
Friendliness of residents	69	4.6	66	4.6	72	4.7	71	4.7	75	4.7	59	4.5
Value for the money	32	4.1	33	4.0	32	4.1	35	4.1	33	4.1	32	4.1
Very likely to recommend Alaska as a vacation destination	79%		78%		81%		83%		82%		71%	
Very likely to return to Alaska in the next five years	40%		53%		33%		38%		28%		28%	

Previous Alaska Travel
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Been to Alaska before for vacation	34%	49%	27%	28%	21%	30%
Average # of vacation trips (base: repeaters)	3.4	3.9	2.9	2.4	2.4	4.3
Previous mode of transportation used to enter/exit Alaska						
Air	72%	77%	73%	67%	79%	16%
Cruise	26	22	31	37	29	32
Highway	11	8	9	9	7	56
Ferry	3	3	4	1	4	4

Trip Planning
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Ave. # of months, trip decision	8.1	7.4	9.2	8.6	9.0	7.0
Ave. # of months, trip booking	5.4	4.8	5.9	5.7	6.5	4.4
Used Internet[1]	68%	67%	67%	75%	67%	64%
Booked over Internet[1]	42	47	41	45	40	28
Booked through travel agent[1]	52	40	57	53	61	66
Other Sources – Top 10[1]						
Friends/family	45%	45%	45%	48%	51%	40%
Cruise line/ tour company	38	29	45	43	45	45
Prior experience	26	39	22	21	18	17
Brochures	25	17	31	29	25	30
AAA	16	16	18	15	26	13
Travel guide/book	13	7	16	13	20	10
Television	11	7	14	12	18	11
Magazine	8	7	6	8	11	10
Milepost	6	5	8	6	6	4
Convention & Visitors Bureaus	5	4	7	6	6	3

[1] Intercept data only.

Demographics
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average party size[1]	2.4	2.3	2.4	2.4	2.4	2.3
Male/female	50/50	52/48	48/52	48/52	48/52	44/56
Average age	51.6	50.9	52.6	52.0	51.6	53.2
Children in household	25%	28%	21%	22%	25%	23%
Retired/semi-retired	39	38	38	44	39	40
College graduate	59	58	56	59	65	61
Average income	$103,000	$105,000	$99,000	$104,000	$111,000	$89,000

[1] Intercept data only.

Summary Profile: International

In this chapter, the International market (excluding Canada) is profiled. Data for the International market as a whole is presented alongside data for all European visitors, German-speaking European visitors, Australian and New Zealand visitors, and Asian visitors. Detailed definitions about countries included in the sub-groups and sample sizes are provided in the table below.

Market Definition and Sample Size
International

Market	Definition	Sample Size	Maximum Margin of Error
International	From an international country; Canadians excluded	704	±3.8%
Europe	From Austria, Belgium, France, Germany, Italy, Netherlands, Russia, Spain, Sweden, Switzerland, United Kingdom, other Europe	449	4.8
GSE (German-Speaking Europe)	From Germany, Switzerland, or Austria	243	6.3
Australia/New Zealand	From Australia or New Zealand	96	10.0
Asia	From China, India, Japan, Korea, Taiwan, other Asia	127	9.1

When compared to the overall Alaska market, international visitors were more likely to be traveling for vacation/pleasure and more likely to purchase multi-day travel packages. Other unique characteristics include:

- Sixty percent of all international visitors exited by cruise ship, compared to 47 percent of all visitors. Correspondingly, international visitors were more likely to visit Southeast.
- International visitors were less likely than the overall market to recommend Alaska as a visitor destination and less likely to return to Alaska in the next five years. Just one in ten visitors had been to Alaska previously for vacation, compared to one-third of all visitors.
- While international visitors used the Internet for travel planning at about the same rate as all visitors, they were less likely to book online and more likely to use a travel agent.

Examination of the subgroups included in the international markets reveals the following:

- Visitors from Europe represented the largest percentage of the international market; therefore their survey responses were quite similar to data from the International market.
- In contrast, visitors from German-speaking Europe countries are quite different from other international visitors. They spent nearly 14 nights in Alaska on average, were much less likely to purchase a cruise package, and had the longest trip decision time. At 45 percent, GSE visitors were the most likely to return to Alaska within the next five years for vacation.

- Visitors from Australia and New Zealand were the most likely to cruise, with 78 percent reporting cruise ship as one of their lodging types. Not surprisingly, they were more likely to visit Southeast, and less likely to visit Southcentral and Interior, compared to the overall market. This market also included the largest percentage of retired and semi-retired visitors compared to other international visitors.

- Asian visitors reported the shortest average trip length (7.5 nights compared to 8.9 for all international visitors). They visited Anchorage more frequently than other international visitors, except for GSE visitors. They are also among the most likely international visitors to return within the next five years (40 percent).

Trip Purpose & Packages
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Trip Purpose						
Vacation/pleasure	82%	92%	93%	83%	90%	88%
Visiting friends/rel.	9	3	4	13	2	5
Business only	5	1	1	<1	2	2
Business/pleasure	4	3	3	4	5	6
Purchased multi-day package						
Yes	69%	79%	75%	37%	87%	70%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	10%	10%	16%	*	4%
Adventure tour	14	21	23	20	*	4
Wilderness lodge	13	22	29	25	*	15
Rail package	9	10	5	1	*	13
Motorcoach tour	5	9	3	5	*	44
Other	12	27	29	34	*	22

* Sample size too small for analysis.

Transportation Modes
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Mode of Entry into Alaska						
Air	49%	33%	32%	67%	29%	50%
Cruise	45	62	62	13	66	50
Highway	4	3	5	18	1	<1
Ferry	1	1	<1	<1	4	-
Mode of Exit from Alaska						
Air	49%	35%	34%	68%	32%	70%
Cruise	47	60	59	10	64	30
Highway	4	4	6	21	2	-
Ferry	1	1	1	2	2	-
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	16%	13%	9%	15%	47%
Train	19	8	4	8	11	47
Rental vehicle	14	14	18	35	7	13
Air	12	10	8	18	10	13
Personal vehicle	9	6	5	5	2	10
State ferry	3	5	6	11	5	1
Rental RV	2	4	6	18	-	3
Personal RV	2	1	1	1	-	-
None of the above	40	56	54	21	76	19
Don't know/refused	1	1	<1	2	1	-

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

Length of Stay, Destinations & Lodging Type
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Average length of stay in Alaska	9.1 nights	8.9 nights	8.8 nights	13.6 nights	9.2 nights	7.5 nights
Regions Visited						
Southeast	71%	80%	79%	54%	89%	51%
Southcentral	56	43	40	78	47	64
Interior	33	27	29	64	24	45
Southwest	3	3	4	7	<1	<1
Far North	3	4	4	17	6	2
Destinations Visited, Top 10						
Juneau	63%	75%	72%	28%	88%	51%
Ketchikan	53	63	60	16	87	16
Skagway	53	72	73	42	74	50
Anchorage	50	37	35	67	39	63
Denali	28	23	25	50	22	40
Glacier Bay/Gustavus	27	25	29	9	44	1
Fairbanks	24	20	22	52	18	34
Seward	21	15	16	44	17	23
Sitka	18	9	3	2	18	6
Whittier	14	14	13	27	19	22
Lodging Types Used						
Cruise ship	60%	71%	68%	14%	78%	50%
Hotel/motel	42	31	30	44	40	52
Lodge	19	11	10	21	14	19
Private home	12	6	6	18	3	10
B&B	6	6	9	22	5	<1
Comm. campground	4	4	6	2	3	2
State/nat'l campground	3	4	5	21	2	1
Wilderness camping	2	3	5	9	-	1
Other	7	4	5	11	1	4

Activities[1]
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Shopping	71%	71%	72%	58%	70%	60%
Wildlife viewing	53	56	53	61	63	69
City/sightseeing tours	44	43	44	43	42	29
Day cruises	40	45	47	51	38	60
Train	38	39	40	19	36	58
Hiking/nature walk	30	31	32	44	33	25
Museums	28	32	29	31	34	33
Native cultural tours/act.	20	14	17	22	10	5
Fishing	20	8	8	29	5	7
Historical/cultural attractions	18	15	11	11	28	7

[1] Based to intercept respondents only.

Satisfaction Ratings
International

	All Visitors		Inter-national		Europe		GSE		Australia/ New Zealand		Asia	
Compared to expectations												
Much higher	25%		28%		29%		38%		26%		19%	
Higher	36		33		30		19		43		37	
About as expected	35		29		29		39		22		28	
Value for the money, compared to other destinations												
Much better	13%		14%		12%		14%		5%		10%	
Better	25		19		19		9		28		18	
About the same	48		48		48		45		53		20	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	70%	4.7	65%	4.6	63%	4.5	68%	4.6	72%	4.7	57%	4.4
Accommodations	54	4.4	55	4.4	55	4.4	37	4.2	57	4.5	44	4.0
Restaurants	42	4.2	43	4.2	42	4.2	26	4.0	44	4.3	46	4.1
Shopping	29	4.0	21	3.8	21	3.8	15	3.7	24	3.8	9	3.4
Visitor info. services	53	4.4	51	4.4	53	4.4	54	4.4	48	4.4	52	4.5
Sightseeing	66	4.6	64	4.6	65	4.6	54	4.4	65	4.6	46	4.2
Tours and activities	60	4.5	55	4.4	54	4.5	62	4.5	59	4.4	27	4.0
Wildlife viewing	50	4.2	44	4.2	50	4.3	64	4.5	30	4.0	49	4.0
Transportation within Alaska	45	4.3	42	4.2	46	4.2	26	3.9	43	4.4	25	3.8
Friendliness of residents	69	4.6	70	4.6	75	4.7	72	4.6	57	4.5	42	4.4
Value for the money	32	4.1	27	3.9	28	3.9	21	3.6	24	4.0	17	3.4
Very likely to recommend Alaska as a vacation destination	79%		69%		67%		75%		76%		59%	
Very likely to return to Alaska in the next five years	40%		26%		23%		45%		14%		40%	

Previous Alaska Travel
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Been to Alaska before for vacation	34%	12%	14%	34%	3%	12%
Average # of vacation trips (base: repeaters)	3.4	3.1	3.5	4.6	*	*
Previous mode of transportation used to enter/exit Alaska						
Air	72%	87%	86%	88%	*	*
Cruise	26	17	16	1	*	*
Highway	11	8	9	15	*	*
Ferry	3	<1	<1	1	*	*

* Sample size too small for analysis.

Trip Planning
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Ave. # of months, trip decision	8.1	8.4	8.8	10.3	8.6	4.5
Ave. # of months, trip booking	5.4	5.7	5.9	5.5	6.2	3.4
Used Internet[1]	68%	64%	65%	53%	65%	54%
Booked over Internet[1]	42	29	34	28	13	30
Booked through travel agent[1]	52	72	70	66	84	83
Other Sources – Top 10[1]						
Friends/family	45%	36%	37%	37%	33%	38%
Cruise line/ tour company	38	38	37	6	34	43
Prior experience	26	7	5	15	4	15
Brochures	25	39	38	29	48	15
AAA	16	2	3	4	<1	2
Travel guide/book	13	22	27	40	12	18
Television	11	15	11	16	31	9
Magazine	8	9	10	16	6	7
Milepost	6	4	5	15	2	1
Convention & Visitors Bureaus	5	7	7	9	6	1

[1] Based to intercept respondents only.

Demographics
International

	All Visitors	Inter-national	Europe	GSE	Australia/ New Zealand	Asia
Average party size[1]	2.4	2.3	2.3	2.2	2.2	2.6
Male/female	50/50	51/49	51/49	63/37	51/49	56/44
Average age	51.6	51.7	50.4	46.8	57.4	43.0
Children in household	25%	24%	21%	23%	20%	15%
Retired/semi-retired	39	36	36	20	55	21
College graduate	59	59	56	49	52	77
Average income	$103,000	$100,000	$106,000	$103,000	$81,000	$82,000

[1] Based to intercept respondents only.

Summary Profile: Alaska Regions

This chapter includes a profile of visitors to each Alaska region. Regions were defined to be consistent with marketing materials produced by the State of Alaska and Alaska Travel Industry Association (regions are illustrated on the map below provided by ATIA). Visitors to Alaska regions, as well as the most-frequently visited communities in each region, are profiled in the following chapters. Regional sample sizes are provided in the table below.

Market Definition and Sample Size
Alaska Regions

Market	Definition	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	3,675	±1.7%
Southeast	Visited at least one destination in the Southeast region, day and/or overnight	3,496	1.7
Interior	Visited at least one destination in the Interior region, day and/or overnight	2,512	2.0
Southwest	Visited at least one destination in the Southwest region, day and/or overnight	242	6.3
Far North	Visited at least one destination in the Far North region, day and/or overnight	240	6.3

Alaska Regions

Trip Purpose & Packages
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Trip Purpose						
Vacation/pleasure	82%	75%	95%	84%	68%	76%
Visiting friends/rel.	9	12	2	8	17	8
Business only	5	7	1	4	10	9
Business/pleasure	4	5	2	3	4	7
Purchased multi-day package						
Yes	69%	56%	89%	61%	47%	52%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	33%	63%	11%	50%	1%
Adventure tour	14	17	7	16	23	35
Wilderness lodge	13	18	13	24	20	20
Rail package	9	13	3	19	2	9
Motorcoach tour	5	6	3	10	-	10
Other	12	15	12	21	4	26

Transportation Modes
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Mode of Entry into Alaska						
Air	49%	71%	32%	68%	91%	80%
Cruise	45	23	63	21	6	8
Highway	4	6	3	10	3	11
Ferry	1	1	1	1	<1	1
Mode of Exit from Alaska						
Air	49%	71%	30%	62%	95%	70%
Cruise	47	23	66	28	1	19
Highway	4	5	3	9	3	9
Ferry	1	1	1	1	1	1
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	40%	33%	51%	9%	39%
Train	19	32	22	50	11	36
Rental vehicle	14	26	5	23	22	30
Air	12	17	8	17	73	63
Personal vehicle	9	15	1	12	16	8
State ferry	3	4	3	6	8	4
Rental RV	2	3	1	5	1	<1
Personal RV	2	3	1	4	3	6
None of the above	40	7	53	2	3	6
Don't know/refused	1	1	1	1	<1	1

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Average length of stay in Alaska	9.1 nights	10.9 nights	8.5 nights	12.6 nights	12.7 nights	15.4 nights
Regions Visited						
Southeast	71%	53%	100%	62%	14%	46%
Southcentral	56	100	41	91	82	88
Interior	33	53	29	100	32	80
Southwest	3	5	1	3	100	12
Far North	3	5	2	7	11	100
Destinations Visited, Top 10						
Juneau	63%	47%	89%	53%	10%	35%
Ketchikan	53	42	75	47	6	30
Skagway	53	43	75	50	8	33
Anchorage	50	90	37	82	75	81
Denali	28	47	27	84	24	61
Glacier Bay/Gustavus	27	29	37	34	10	25
Fairbanks	24	38	23	72	20	74
Seward	21	38	15	39	18	39
Sitka	18	14	25	11	4	8
Whittier	14	25	14	25	9	26
Lodging Types Used						
Cruise ship	60%	45%	84%	49%	10%	28%
Hotel/motel	42	66	34	75	64	81
Lodge	19	29	19	44	30	30
Private home	12	17	4	12	22	17
B&B	6	9	3	9	17	19
Comm. campground	4	7	3	10	6	10
State/nat'l campground	3	5	2	8	5	6
Wilderness camping	2	3	1	4	10	8
Other	7	9	4	9	16	17

Activities – Top 10[1]
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Shopping	71%	71%	76%	78%	61%	68%
Wildlife viewing	53	65	57	77	71	71
City/sightseeing tours	44	39	56	49	25	51
Day cruises	40	46	44	59	24	54
Train	38	38	50	52	12	32
Hiking/nature walk	30	37	27	40	35	47
Museums	28	34	28	42	31	50
Native cultural tours/act.	20	22	24	31	15	38
Fishing	20	25	13	18	53	21
Historical/cultural attractions	18	18	21	25	12	29

[1] Based to intercept respondents only.

Note: These figures refer to activities participated in *statewide*. Complete lists of activities by region and community are provided in the following chapters.

Satisfaction Ratings
By Region

	All Visitors		South-central		Southeast		Interior		Southwest		Far North	
Compared to expectations												
Much higher	25%		27%		26%		30%		22%		27%	
Higher	36		37		36		37		34		39	
About as expected	35		32		34		28		40		28	
Value for the money, compared to other destinations												
Much better	13%		13%		13%		13%		12%		16%	
Better	25		23		26		22		28		18	
About the same	48		46		48		46		52		49	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	70%	4.7	71%	4.7	72%	4.7	72%	4.7	73%	4.7	75%	4.7
Accommodations	54	4.4	50	4.4	59	4.5	47	4.3	45	4.3	33	4.2
Restaurants	42	4.2	38	4.2	44	4.3	35	4.1	36	4.2	30	4.1
Shopping	29	4.0	29	4.0	29	4.0	28	4.0	36	4.0	26	3.9
Visitor info. services	53	4.4	56	4.5	52	4.4	57	4.5	56	4.5	62	4.5
Sightseeing	66	4.6	69	4.6	65	4.6	69	4.6	71	4.7	71	4.7
Tours and activities	60	4.5	61	4.5	60	4.5	60	4.5	65	4.5	63	4.5
Wildlife viewing	50	4.2	53	4.3	49	4.2	52	4.2	68	4.5	57	4.4
Transportation within Alaska	45	4.3	46	4.3	48	4.4	47	4.3	45	4.3	41	4.2
Friendliness of residents	69	4.6	70	4.6	70	4.7	71	4.7	71	4.7	69	4.6
Value for the money	32	4.1	31	4.0	34	4.1	28	4.0	33	4.1	28	3.9
Very likely to recommend Alaska as a vacation destination	79%		79%		80%		79%		79%		85%	
Very likely to return to Alaska in the next five years	40%		44%		31%		33%		65%		48%	

Previous Alaska Travel
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Been to Alaska before for vacation	34%	37%	25%	29%	66%	49%
Average # of vacation trips (base: repeaters)	3.4	3.3	3.1	2.6	4.2	2.9
Previous mode of transportation used to enter/exit Alaska						
Air	72%	81%	58%	72%	94%	80%
Cruise	26	21	41	25	7	12
Highway	11	10	13	15	4	13
Ferry	3	2	4	2	2	4

Trip Planning
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Ave. # of months, trip decision	8.1	8.2	8.8	9.3	8.1	8.7
Ave. # of months, trip booking	5.4	5.1	6.3	5.6	4.6	4.8
Used Internet[1]	68%	70%	66%	69%	70%	74%
Booked over Internet[1]	42	47	35	41	52	48
Booked through travel agent[1]	52	47	65	57	27	46
Other Sources – Top 10[1]						
Friends/family	45%	47%	43%	46%	44%	44%
Cruise line/tour co.	38	32	52	38	10	25
Prior experience	26	28	20	17	51	39
Brochures	25	26	26	30	28	30
AAA	16	16	17	22	13	23
Travel guide/book	13	15	13	21	6	21
Television	11	11	15	15	5	12
Magazine	8	9	8	10	10	5
Milepost	6	9	3	12	9	18
CVB's	5	7	4	8	5	9

[1] Based to intercept respondents only.

Demographics
By Region

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Origin						
Western US	39%	38%	34%	28%	56%	33%
Southern US	19	21	20	23	14	19
Eastern US	13	15	14	19	15	19
Midwestern US	13	15	13	18	5	17
Canada	6	3	7	4	1	1
Other International	9	7	11	8	8	12
Other Demographics						
Average party size[1]	2.4	2.3	2.5	2.2	2.1	2.1
Male/female	50/50	52/48	47/53	49/51	63/37	57/43
Average age	51.6	51.3	53.0	53.4	50.4	54.5
Children in household	25%	23%	24%	19%	24%	20%
Retired/semi-retired	39	40	43	46	37	39
College graduate	59	62	59	62	63	67
Average income	$103,000	$104,000	$105,000	$99,000	$113,000	$113,000

[1] Based to intercept respondents only.

Summary Profile: Southcentral Communities

Visitors to Southcentral and the nine most-frequently visited communities are profiled in this chapter. Definitions for each community and sample sizes are provided in the table below.

Market Definition and Sample Size
Southcentral Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	3,675	±1.7%
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	3,265	1.7
Seward	Visited Seward, day and/or overnight	1,448	2.6
Whittier	Visited Whittier, day and/or overnight	1,032	3.2
Talkeetna	Visited Talkeetna, day and/or overnight	884	3.4
Kenai/Soldotna	Visited Kenai or Soldotna, day and/or overnight	777	3.5
Homer	Visited Homer or Seldovia, day and/or overnight	745	3.7
Palmer/Wasilla	Visited Palmer or Wasilla, day and/or overnight	666	3.9
Girdwood	Visited Girdwood or Alyeska, day and/or overnight	571	4.2
Valdez	Visited Valdez, day and/or overnight	400	5.0

Differences between Southcentral Alaska visitors and the overall Alaska market include:

- Southcentral visitors were somewhat more likely to be VFRs or be traveling for business.
- They were much more likely to enter and exit Alaska by air, and less likely to travel by cruise ship. Southcentral Alaska visitors were also more likely to visit Interior Alaska communities than the overall market.
- Their average trip length was slightly higher than the overall market (10.9 nights and 9.1 nights respectively).
- Southcentral visitors were more likely than the overall market to participate in tours and activities.

Unique characteristics when comparing visitors to individual Southcentral communities include:

- Anchorage, Palmer/Wasilla, and Girdwood attracted the highest percentage of business travelers. Palmer/Wasilla drew the largest percentage of VFRs.
- Valdez visitors were the most likely to enter or exit the state by highway or ferry. The communities of Palmer/Wasilla, Homer, and Kenai/Soldotna also attracted relatively high percentages of highway and

ferry travelers. Correspondingly, visitors to these communities also reported the longest length of stay in Alaska (ranging from 14.6 nights to 18.8 nights).

- Visitors to Anchorage, Seward, Whittier, and Talkeetna were the most likely to be cruise passengers, while visitors to Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were more likely to stay in private homes and in various campgrounds.
- Visitors to Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were the most likely to have visited Alaska previously and the most likely to return to Alaska in the next 5 years.

Trip Purpose & Packages
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Trip Purpose						
Vacation/pleasure	82%	75%	75%	81%	86%	88%
Visiting friends/rel.	9	12	12	12	7	7
Business only	5	7	8	2	2	1
Business/pleasure	4	5	6	5	5	3
Purchased multi-day package						
Yes	69%	56%	55%	52%	67%	66%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	33%	30%	24%	14%	18%
Adventure tour	14	17	17	17	11	15
Wilderness lodge	13	18	18	19	27	23
Rail package	9	13	13	15	22	17
Motorcoach tour	5	6	7	6	7	10
Other	12	15	14	19	19	17

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Purpose					
Vacation/pleasure	71%	73%	62%	66%	81%
Visiting friends/rel.	18	19	26	19	14
Business only	3	2	6	4	2
Business/pleasure	7	5	6	11	3
Purchased multi-day package					
Yes	30%	22%	20%	33%	24%
Package type (Base: non-cruise, purchased package)					
Fishing lodge	47%	47%	26%	16%	14%
Adventure tour	14	16	25	15	18
Wilderness lodge	19	17	19	24	15
Rail package	7	3	6	22	3
Motorcoach tour	1	3	8	6	18
Other	12	14	16	18	31

Transportation Modes
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Mode of Entry into Alaska						
Air	49%	71%	72%	72%	56%	70%
Cruise	45	23	22	18	38	23
Highway	4	6	5	9	6	6
Ferry	1	1	1	1	1	1
Mode of Exit from Alaska						
Air	49%	71%	72%	70%	73%	64%
Cruise	47	23	23	22	21	30
Highway	4	5	5	7	5	5
Ferry	1	1	1	1	1	1
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	40%	39%	29%	49%	52%
Train	19	32	32	26	40	49
Rental vehicle	14	26	27	42	27	27
Air	12	17	17	13	15	14
Personal vehicle	9	15	14	16	12	9
State ferry	3	4	4	7	6	4
Rental RV	2	3	3	8	4	8
Personal RV	2	3	3	6	3	1
None of the above	40	7	8	2	2	1
Don't know/refused	1	1	1	1	<1	<1

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Mode of Entry into Alaska					
Air	80%	76%	74%	83%	61%
Cruise	6	6	6	9	4
Highway	13	17	19	8	31
Ferry	1	1	2	1	3
Mode of Exit from Alaska					
Air	78%	81%	76%	82%	61%
Cruise	9	3	5	12	4
Highway	11	15	18	5	31
Ferry	1	2	1	1	3
Used to Travel Between Communities[1]					
Motorcoach/bus	13%	7%	9%	34%	15%
Train	12	7	9	28	12
Rental vehicle	39	45	41	44	33
Air	18	20	10	16	10
Personal vehicle	29	25	33	21	22
State ferry	6	9	5	7	20
Rental RV	10	12	8	6	12
Personal RV	7	9	9	2	19
None of the above	3	1	4	2	1
Don't know/refused	1	1	1	<1	3

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

Length of Stay, Destinations & Lodging Type
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Average length of stay in Alaska	9.1 nights	10.9 nights	10.7 nights	12.4 nights	11.2 nights	12.8 nights
Regions Visited						
Southeast	71%	53%	52%	51%	68%	65%
Southcentral	56	100	100	100	100	100
Interior	33	53	54	61	57	89
Southwest	3	5	5	3	2	4
Far North	3	5	5	6	5	4
Destinations Visited, Top 10						
Juneau	63%	47%	46%	43%	61%	57%
Ketchikan	53	42	41	34	60	50
Skagway	53	43	42	36	62	56
Anchorage	50	90	100	93	90	89
Denali	28	47	48	56	52	86
Glacier Bay/Gustavus	27	29	29	28	43	36
Fairbanks	24	38	37	39	40	60
Seward	21	38	39	100	29	49
Sitka	18	14	14	17	17	14
Whittier	14	25	25	20	100	33
Lodging Types Used						
Cruise ship	60%	45%	43%	38%	58%	53%
Hotel/motel	42	66	70	70	61	74
Lodge	19	29	27	27	28	50
Private home	12	17	16	17	11	11
B&B	6	9	10	14	10	14
Commercial campground	4	7	7	11	8	9
State/national campground	3	5	5	8	5	7
Wilderness camping	2	3	3	3	2	3
Other	7	9	9	11	11	9

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

	All Visitors	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Average length of stay in Alaska	9.1 nights	14.6 nights	15.0 nights	14.6 nights	11.9 nights	18.8 nights
Regions Visited						
Southeast	71%	31%	29%	30%	34%	46%
Southcentral	56	100	100	100	100	100
Interior	33	52	52	63	58	92
Southwest	3	5	8	4	4	6
Far North	3	5	5	6	5	12
Destinations Visited, Top 10						
Juneau	63%	20%	14%	16%	23%	23%
Ketchikan	53	18	11	13	19	15
Skagway	53	21	17	20	24	32
Anchorage	50	89	88	94	98	87
Denali	28	45	45	52	50	67
Glacier Bay/Gustavus	27	20	14	10	15	15
Fairbanks	24	34	31	40	34	66
Seward	21	61	63	52	63	57
Sitka	18	5	6	8	10	9
Whittier	14	28	25	27	39	36
Lodging Types Used						
Cruise ship	60%	15%	9%	10%	21%	9%
Hotel/motel	42	59	56	57	71	57
Lodge	19	25	22	18	24	18
Private home	12	30	31	32	25	24
B&B	6	17	23	18	19	18
Commercial campground	4	17	21	19	11	34
State/national campground	3	13	16	14	9	23
Wilderness camping	2	5	5	6	5	9
Other	7	12	17	12	9	13

Statewide Activities – Top 10[1]
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Shopping	71%	71%	71%	75%	78%	86%
Wildlife viewing	53	65	65	75	73	83
City/sightseeing tours	44	39	39	33	47	52
Day cruises	40	46	47	63	65	67
Train	38	38	37	31	50	55
Hiking/nature walk	30	37	37	45	44	43
Museums	28	34	36	47	41	45
Native cultural tours/act.	20	22	21	21	24	38
Fishing	20	25	22	31	21	28
Historical/cultural attractions	18	18	19	22	24	25

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Shopping	64%	69%	70%	77%	80%
Wildlife viewing	63	66	61	80	78
City/sightseeing tours	22	25	23	38	33
Day cruises	42	48	38	65	64
Train	15	12	15	30	20
Hiking/nature walk	41	46	45	54	46
Museums	35	44	41	51	62
Native cultural tours/act.	14	12	15	23	18
Fishing	57	53	33	20	36
Historical/cultural attractions	14	17	17	22	25

[1] Based to intercept respondents only.

Activities in Community/Region[1]
Southcentral Communities

	South-central	Anchorage	Seward	Whittier	Talkeetna
Wildlife viewing	28%	11%	29%	15%	9%
Birdwatching	9	4	11	4	2
Cultural activities	27	22	12	1	7
Museums	21	16	11	1	5
Native cultural tours/act.	7	8	1	-	-
Historical/cultural attractions	6	4	2	-	2
Gold panning/mine tour	1	-	-	-	-
Visiting friends/relatives	21	14	2	1	2
Day cruises	21	1	32	28	6
Hiking/nature walk	18	8	18	2	6
Fishing	17	1	9	2	9
Guided	10	<1	6	<1	5
Unguided	10	1	3	1	4
City/sightseeing tours	14	13	8	4	6
Camping	8	3	10	2	3
Flightseeing	5	1	<1	-	15
Shows/Alaska entertainment	4	4	<1	-	-
Tramway/gondola	3	<1	-	-	-
Dog sledding	2	<1	5	-	1
Rafting	2	-	-	-	3
Kayaking/canoeing	2	-	3	-	-
Salmon bake	2	1	2	<1	1
Biking	2	2	-	-	-
Hunting	<1	-	-	-	<1
Northern Lights viewing	<1	<1	-	-	-
Other	3	1	2	<1	1

[1] Based to intercept respondents only.

Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Activities in Community/Region (Cont'd)[1]
Southcentral Communities

	South-central	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Wildlife viewing	28%	22%	32%	12%	14%	25%
Birdwatching	9	6	13	1	3	9
Cultural activities	27	5	19	12	7	21
Museums	21	4	18	6	-	21
Native cultural tours/act.	7	-	<1	-	-	-
Historical/cultural attractions	6	2	2	5	1	3
Gold panning/mine tour	1	-	-	2	6	-
Visiting friends/relatives	21	19	9	25	3	5
Day cruises	21	3	8	1	4	24
Hiking/nature walk	18	14	11	13	13	13
Fishing	17	38	33	5	-	16
Guided	10	19	23	1	-	6
Unguided	10	23	13	4	-	11
City/sightseeing tours	14	4	4	2	3	8
Camping	8	14	13	13	2	27
Flightseeing	5	3	2	-	1	-
Shows/Alaska entertainment	4	-	<1	-	-	-
Tramway/gondola	3	-	-	-	31	-
Dog sledding	2	-	-	4	-	-
Rafting	2	4	-	1	2	1
Kayaking/canoeing	2	3	3	1	-	2
Salmon bake	2	2	<1	-	-	1
Biking	2	-	1	1	1	1
Hunting	<1	-	-	-	-	-
Northern Lights viewing	<1	-	-	-	-	-
Other	3	2	<1	5	-	-

[1] Based to intercept respondents only.
Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings
Southcentral Communities

	All Visitors		South-central		Anchorage		Seward		Whittier		Talkeetna	
Compared to expectations												
Much higher	25%		27%		27%		29%		31%		33%	
Higher	36		37		37		39		38		39	
About as expected	35		32		32		29		27		25	
Value for the money, compared to other destinations												
Much better	13%		13%		13%		13%		16%		12%	
Better	25		23		24		23		22		23	
About the same	48		46		46		45		48		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	70%	4.7	71%	4.7	70%	4.7	73%	4.7	75%	4.7	76%	4.7
Accommodations	54	4.4	50	4.4	49	4.3	44	4.3	51	4.4	52	4.4
Restaurants	42	4.2	38	4.2	38	4.2	34	4.1	39	4.2	36	4.2
Shopping	29	4.0	29	4.0	29	4.0	28	4.0	30	4.0	29	4.0
Visitor info. services	53	4.4	56	4.5	56	4.5	56	4.5	56	4.5	59	4.5
Sightseeing	66	4.6	69	4.6	69	4.6	71	4.7	72	4.7	72	4.7
Tours and activities	60	4.5	61	4.5	61	4.5	64	4.6	63	4.6	62	4.5
Wildlife viewing	50	4.2	53	4.3	53	4.3	57	4.4	51	4.3	53	4.3
Transportation within Alaska	45	4.3	46	4.3	46	4.3	47	4.3	50	4.4	52	4.4
Friendliness of residents	69	4.6	70	4.6	70	4.6	72	4.7	73	4.7	73	4.7
Value for the money	32	4.1	31	4.0	31	4.0	30	4.0	33	4.0	29	4.0
Very likely to recommend Alaska	79%		79%		80%		79%		82%		82%	
Very likely to return to Alaska in next five years	40%		44%		44%		40%		37%		31%	

	Kenai/ Soldotna		Homer		Palmer/ Wasilla		Girdwood		Valdez	
Compared to expectations										
Much higher	26%		20%		26%		28%		29%	
Higher	37		37		35		40		35	
About as expected	33		38		36		29		33	
Value for the money, compared to other destinations										
Much better	14%		12%		15%		13%		15%	
Better	24		20		22		22		18	
About the same	45		47		46		47		44	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall exper. in Alaska	71%	4.7	68%	4.6	71%	4.7	75%	4.7	74%	4.7
Accommodations	42	4.2	36	4.2	43	4.3	48	4.3	32	4.1
Restaurants	34	4.1	31	4.1	35	4.1	41	4.2	28	4.0
Shopping	24	4.0	23	4.0	29	4.1	28	4.0	27	4.0
Visitor info. services	55	4.4	54	4.4	61	4.5	55	4.5	61	4.5
Sightseeing	72	4.7	69	4.6	71	4.7	75	4.7	70	4.7
Tours and activities	62	4.5	57	4.5	60	4.5	62	4.6	63	4.5
Wildlife viewing	56	4.4	56	4.4	54	4.4	60	4.4	60	4.4
Transportation within Alaska	41	4.2	36	4.1	38	4.2	49	4.4	37	4.1
Friendliness of residents	70	4.6	68	4.6	68	4.6	72	4.6	72	4.6
Value for the money	29	3.9	25	3.9	29	4.0	26	3.9	27	3.9
Very likely to recommend Alaska	80%		76%		81%		79%		81%	
Very likely to return to Alaska in next five years	55%		55%		55%		51%		41%	

Previous Alaska Travel
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Been to Alaska before for vacation	34%	37%	37%	31%	25%	24%
Average # of vacation trips (base: repeaters)	3.4	3.3	3.2	2.8	2.8	2.8
Previous mode of transportation used to enter/exit Alaska						
Air	72%	81%	80%	76%	76%	76%
Cruise	26	21	22	27	29	29
Highway	11	10	9	12	10	11
Ferry	3	2	2	1	2	1

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Been to Alaska before for vacation	52%	51%	53%	43%	43%
Average # of vacation trips (base: repeaters)	3.5	3.8	4.1	3.3	3.0
Previous mode of transportation used to enter/exit Alaska					
Air	82%	78%	77%	85%	62%
Cruise	14	16	10	14	16
Highway	13	15	16	8	28
Ferry	2	3	3	1	5

Trip Planning
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Ave. # of months, trip decision	8.1	8.2	8.2	8.7	9.5	10.0
Ave. # of months, trip booking	5.4	5.1	5.0	4.9	5.9	5.9
Used Internet[1]	68%	70%	71%	76%	73%	73%
Booked over Internet[1]	42	47	48	53	48	44
Booked through travel agent[1]	52	47	47	38	49	55
Other Sources – Top 10[1]						
Friends/family	45%	47%	46%	51%	42%	51%
Cruise line/ tour company	38	32	32	24	42	42
Prior experience	26	28	28	23	17	18
Brochures	25	26	27	33	24	32
AAA	16	16	17	22	20	24
Travel guide/book	13	15	15	24	17	22
Television	11	11	10	10	8	18
Magazine	8	9	9	14	7	15
Milepost	6	9	10	18	12	11
Convention & Visitors Bureaus	5	7	7	12	10	9

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Ave. # of months, trip decision	8.9	8.9	8.1	8.5	10.0
Ave. # of months, trip booking	4.3	4.2	3.5	4.4	3.8
Used Internet[1]	73%	78%	74%	75%	72%
Booked over Internet[1]	56	57	55	59	44
Booked through travel agent[1]	18	20	26	32	33
Other Sources – Top 10[1]					
Friends/family	54%	50%	54%	55%	40%
Cruise line/ tour company	9	8	10	17	11
Prior experience	41	34	33	28	22
Brochures	27	34	31	28	35
AAA	15	21	22	22	24
Travel guide/book	15	20	18	17	26
Television	9	8	8	10	10
Magazine	9	10	16	14	10
Milepost	22	28	25	16	37
Convention & Visitors Bureaus	9	14	12	8	15

[1] Based to intercept respondents only.

Demographics
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Origin						
Western US	39%	38%	38%	33%	32%	29%
Southern US	19	21	22	24	21	25
Eastern US	13	15	15	17	15	19
Midwestern US	13	15	15	16	19	18
Canada	6	3	3	4	3	2
Other International	9	7	7	7	9	8
Other Demographics						
Average party size[1]	2.4	2.3	2.2	2.5	2.5	2.4
Male/female	50/50	52/48	52/48	50/50	48/52	47/53
Average age	51.6	51.3	51.3	50.5	50.6	51.6
Children in household	25%	23%	22%	21%	22%	19%
Retired/semi-retired	39	40	40	42	40	45
College graduate	59	62	62	65	62	65
Average income	$103,000	$104,000	$104,000	$100,000	$107,000	$101,000

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Origin					
Western US	42%	44%	44%	38%	31%
Southern US	19	19	19	19	21
Eastern US	10	11	11	14	13
Midwestern US	17	18	15	19	17
Canada	3	2	4	2	8
Other International	10	5	7	7	10
Other Demographics					
Average party size[1]	2.4	2.5	2.2	2.2	2.6
Male/female	57/43	55/45	52/48	51/49	50/50
Average age	50.4	50.6	51.0	49.2	50.9
Children in household	19%	18%	18%	23%	15%
Retired/semi-retired	40	44	42	36	51
College graduate	58	58	55	66	53
Average income	$97,000	$97,000	$88,000	$103,000	$84,000

[1] Based to intercept respondents only.

Visitor Expenditures, Per Person[1]
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Ave. in-state expend.	$934	$1,138	$1,181	$1,365	$1,182	$1,328
Expend. in location		552	501	194	60	158
Lodging		145	164	56	5	48
Tours/activity/ entertainment		71	18	63	39	56
Gifts/souvenirs/ clothing		66	60	22	2	18
Food/beverage		104	76	36	5	25
Rental cars/fuel/ transportation		94	124	14	8	11
Other		72	59	3	1	-

		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Ave. in-state expend.		$1,407	$1,440	$1,290	$1,378	$1,618
Expend. in location		341	313	144	109	210
Lodging		42	60	44	21	49
Tours/activity/ entertainment		50	85	9	23	54
Gifts/souvenirs/ clothing		24	39	14	9	15
Food/beverage		73	51	51	33	38
Rental cars/fuel/ transportation		43	30	23	23	20
Other		109	48	3	-	34

[1] Based to intercept respondents only.
Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: Southeast Communities

Visitors to Southeast and the nine most-frequently visited communities are profiled in this chapter. Definitions for each community and sample sizes are provided in the table below.

Market Definition and Sample Size
Southeast Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southeast	Visited at least one destination in the Southeast region, day and/or overnight	3,496	±1.7%
Juneau	Visited Juneau or Douglas, day and/or overnight	2,696	1.9
Ketchikan	Visited Ketchikan or Saxman, day and/or overnight	2,268	2.1
Skagway	Visited Skagway, day and/or overnight	2,231	2.1
Sitka	Visited Sitka, day and/or overnight	1,055	3.2
Glacier Bay/ Gustavus	Visited Glacier Bay or Gustavus, day and/or overnight	907	6.3
Haines	Visited Haines, day and/or overnight	493	4.5
Hoonah/Icy Strait Point	Visited Hoonah or Icy Strait Point, day and/or overnight	430	4.8
Petersburg	Visited Petersburg, day and/or overnight	259	6.3
Wrangell	Visited Wrangell, day and/or overnight	242	6.3

Southeast visitors were significantly more likely than the overall market to be traveling for vacation/pleasure, to purchase multi-day tour packages (includes cruises), and to be traveling by cruise ship. Other differences between Southeast and the overall market include:

- The average length of stay was 8.5 nights, compared to 9.1 nights for the overall market. In addition to a higher percentage of cruise passengers, Southeast also attracted more visitors that purchased fishing lodge packages. Correspondingly, Southeast visitors were less likely to visit Southcentral than the overall market.

- Southeast visitors were less likely than the overall market to have been to Alaska previously (25 percent versus 34 percent, respectively).

Unique characteristics when comparing visitors to individual Southeast communities include:

- Data for Juneau, Ketchikan, Skagway, Sitka, Gustavus and Hoonah reflects the high percentage of cruise passengers that visit these communities. A large percentage of visitors to these communities entered or exited Alaska by cruise, they participated in a wide array of tours and activities, and were less likely to have visited Alaska previously.

- In contrast, visitors to Haines, Petersburg and Wrangell were most likely to travel to and from Alaska by air, followed by highway and ferry. Their average trip length was longer than other Southeast communities, ranging from 11.7 nights among Haines visitors to 16.6 nights among Wrangell visitors.

- Petersburg and Wrangell visitors were the most likely to have been to Alaska previously for vacation; they are the most likely to return within the next five years as well.

- Petersburg and Wrangell attracted the highest percentage of male visitors and the highest percentage of retired or semi-retired visitors compared to other Southeast communities.

Trip Purpose & Packages
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Trip Purpose						
Vacation/pleasure	82%	95%	97%	97%	98%	96%
Visiting friends/rel.	9	2	1	1	1	2
Business only	5	1	1	1	<1	1
Business/pleasure	4	2	1	1	1	1
Purchased multi-day package						
Yes	69%	89%	95%	96%	96%	92%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	63%	34%	63%	4%	77%
Adventure tour	14	7	13	5	9	4
Wilderness lodge	13	13	24	12	19	9
Rail package	9	3	7	5	9	1
Motorcoach tour	5	3	<1	1	14	2
Other	12	12	22	13	44	7

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Trip Purpose					
Vacation/pleasure	98%	96%	97%	86%	87%
Visiting friends/rel.	1	3	1	7	5
Business only	<1	<1	-	1	1
Business/pleasure	1	1	2	6	6
Purchased multi-day package					
Yes	95%	77%	98%	50%	51%
Package type (Base: non-cruise, purchased package)					
Fishing lodge	*	*	*	*	*
Adventure tour	*	*	*	*	*
Wilderness lodge	*	*	*	*	*
Rail package	*	*	*	*	*
Motorcoach tour	*	*	*	*	*
Other	*	*	*	*	*

* Sample size too small for analysis.

Transportation Modes
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Mode of Entry into Alaska						
Air	49%	32%	28%	32%	27%	28%
Cruise	45	63	70	66	69	69
Highway	4	3	1	1	4	1
Ferry	1	1	1	1	1	1
Mode of Exit from Alaska						
Air	49%	30%	27%	25%	26%	42%
Cruise	47	66	72	73	70	55
Highway	4	3	1	1	3	1
Ferry	1	1	1	1	1	2
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	33%	35%	36%	40%	29%
Train	19	22	24	24	27	17
Rental vehicle	14	5	5	5	5	5
Air	12	8	6	6	5	8
Personal vehicle	9	1	1	<1	1	1
State ferry	3	3	3	2	3	4
Rental RV	2	1	<1	<1	<1	1
Personal RV	2	1	<1	<1	1	<1
None of the above	40	53	54	54	48	58
Don't know/refused	1	1	1	1	1	1

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Mode of Entry into Alaska					
Air	39%	54%	36%	70%	67%
Cruise	59	28	63	1	3
Highway	1	15	1	9	14
Ferry	<1	3	<1	18	15
Mode of Exit from Alaska					
Air	33%	24%	26%	72%	62%
Cruise	66	58	73	5	16
Highway	1	15	1	10	13
Ferry	<1	3	<1	13	9
Used to Travel Between Communities[1]					
Motorcoach/bus	40%	44%	54%	9%	14%
Train	31	35	33	6	9
Rental vehicle	2	7	9	9	11
Air	8	12	8	30	29
Personal vehicle	<1	5	1	7	6
State ferry	2	19	2	33	30
Rental RV	1	2	-	3	<1
Personal RV	<1	3	<1	1	3
None of the above	50	28	31	38	40
Don't know/refused	2	<1	-	-	-

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Average length of stay in Alaska	9.1 nights	8.5 nights	8.3 nights	8.6 nights	8.5 nights	8.3 nights
Regions Visited						
Southeast	71%	100%	100%	100%	100%	100%
Southcentral	56	41	41	43	45	45
Interior	33	29	27	29	31	21
Southwest	3	1	<1	<1	1	1
Far North	3	2	2	2	2	1
Destinations Visited, Top 10						
Juneau	63%	89%	100%	94%	95%	91%
Ketchikan	53	75	80	100	78	74
Skagway	53	75	79	77	100	43
Anchorage	50	37	36	38	39	41
Denali	28	27	26	28	29	20
Glacier Bay/Gustavus	27	37	39	47	37	35
Fairbanks	24	23	22	23	25	16
Seward	21	15	14	13	14	20
Sitka	18	25	25	24	14	100
Whittier	14	14	14	16	17	14
Lodging Types Used						
Cruise ship	60%	84%	92%	92%	93%	86%
Hotel/motel	42	34	33	34	33	34
Lodge	19	19	19	21	20	15
Private home	12	4	2	2	1	3
B&B	6	3	2	2	2	4
Commercial campground	4	3	1	1	2	1
State/national campground	3	2	1	1	2	1
Wilderness camping	2	1	1	1	1	<1
Other	7	4	3	4	3	5

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

	All Visitors	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Average length of stay in Alaska	9.1 nights	9.1 nights	11.7 nights	8.6 nights	13.8 nights	16.6 nights
Regions Visited						
Southeast	71%	100%	100%	100%	100%	100%
Southcentral	56	58	67	53	41	62
Interior	33	40	55	36	39	60
Southwest	3	1	1	1	3	5
Far North	3	3	5	2	6	11
Destinations Visited, Top 10						
Juneau	63%	94%	82%	99%	81%	61%
Ketchikan	53	90	61	43	79	67
Skagway	53	72	58	91	54	52
Anchorage	50	51	62	48	37	53
Denali	28	40	50	36	32	49
Glacier Bay/Gustavus	27	100	52	14	36	29
Fairbanks	24	33	44	29	32	47
Seward	21	21	39	37	20	34
Sitka	18	26	20	26	56	41
Whittier	14	24	13	2	10	25
Lodging Types Used						
Cruise ship	60%	90%	72%	95%	36%	30%
Hotel/motel	42	47	57	44	67	57
Lodge	19	27	24	24	15	20
Private home	12	2	6	1	11	9
B&B	6	3	4	2	17	18
Commercial campground	4	1	11	<1	11	19
State/national campground	3	1	7	<1	9	15
Wilderness camping	2	1	3	<1	4	5
Other	7	5	7	3	18	19

Statewide Activities – Top 10[1]
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Shopping	71%	76%	77%	78%	77%	78%
Wildlife viewing	53	57	57	58	56	66
City/sightseeing tours	44	56	59	59	60	55
Day cruises	40	44	46	45	47	48
Train	38	50	53	53	64	28
Hiking/nature walk	30	27	26	25	25	33
Museums	28	28	27	26	28	31
Native cultural tours/act.	20	24	25	26	24	30
Fishing	20	13	10	10	10	13
Historical/cultural attractions	18	21	21	20	17	41

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Shopping	85%	71%	79%	75%	77%
Wildlife viewing	79	76	62	79	82
City/sightseeing tours	63	55	62	55	56
Day cruises	52	65	57	47	51
Train	48	49	65	37	44
Hiking/nature walk	31	32	30	48	42
Museums	34	45	31	56	71
Native cultural tours/act.	35	29	36	38	41
Fishing	10	14	15	37	33
Historical/cultural attractions	29	19	21	32	33

[1] Based to intercept respondents only.

Activities in Community/Region[1]
Southeast Communities

	Southeast	Juneau	Ketchikan	Skagway	Sitka
City/sightseeing tours	49%	35%	29%	27%	24%
White Pass/Yukon Route	39	-	-	51	-
Cultural activities	43	16	22	22	40
Museums	22	10	8	12	15
Native cultural tours/act.	18	2	13	1	15
Historical/cultural attractions	17	5	6	5	30
Gold panning/mine tour	8	2	<1	8	1
Wildlife viewing	36	23	13	12	34
Birdwatching	15	8	6	4	16
Day cruises	34	26	6	6	14
Hiking/nature walk	22	11	7	8	18
Flightseeing	15	9	6	2	<1
Tramway/gondola	14	15	1	<1	<1
Salmon bake	13	10	<1	5	1
Fishing	12	2	6	1	8
Guided	9	2	5	1	7
Unguided	3	<1	1	<1	1
Shows/Alaska entertainment	8	1	5	3	5
Dog sledding	6	3	<1	3	-
Kayak/canoeing	5	1	2	2	2
Visiting friends/relatives	4	1	1	<1	2
Rafting	2	1	-	<1	-
Biking	2	1	<1	1	2
Camping	1	<1	<1	1	<1
Northern lights viewing	<1	<1	-	-	-
Hunting	<1	-	-	-	-
Other	8	2	5	3	2

[1] Based to intercept respondents only.
Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Activities in Community/Region (Cont'd)[1]
Southeast Communities

	Southeast	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
City/sightseeing tours	49%	1%	16%	8%	17%	18%
White Pass/Yukon Route	39	-	-	-	-	-
Cultural activities	43	1	17	23	21	36
Museums	22	-	15	6	15	27
Native cultural tours/act.	18	-	4	16	7	16
Historical/cultural attractions	17	1	1	5	4	9
Gold panning/mine tour	8	-	1	-	-	-
Wildlife viewing	36	8	34	15	25	25
Birdwatching	15	5	15	4	7	10
Day cruises	34	5	21	15	6	-
Hiking/nature walk	22	2	11	15	18	9
Flightseeing	15	1	2	-	3	-
Tramway/gondola	14	-	-	-	-	-
Salmon bake	13	-	-	-	-	-
Fishing	12	1	4	6	15	-
Guided	9	<1	1	5	5	-
Unguided	3	1	3	<1	11	-
Shows/Alaska entertainment	8	<1	1	-	3	-
Dog sledding	6	-	-	-	-	-
Kayak/canoeing	5	-	3	-	-	-
Visiting friends/relatives	4	1	2	-	7	5
Rafting	2	-	4	-	-	-
Biking	2	-	1	<1	-	-
Camping	1	<1	8	-	-	5
Northern lights viewing	<1	-	-	-	-	-
Hunting	<1	-	-	-	-	-
Other	8	-	2	4	-	-

[1] Based to intercept respondents only.
Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings
Southeast Communities

	All Visitors		Southeast		Juneau		Ketchikan		Skagway		Sitka	
Compared to expectations												
Much higher	25%		26%		26%		27%		27%		25%	
Higher	36		36		36		36		36		37	
About as expected	35		34		33		32		31		36	
Value for the money, compared to other destinations												
Much better	13%		13%		13%		13%		13%		15%	
Better	25		26		27		27		27		27	
About the same	48		48		48		48		48		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	70%	4.7	72%	4.7	72%	4.7	73%	4.7	71%	4.7	75%	4.7
Accommodations	54	4.4	59	4.5	60	4.5	60	4.5	59	4.5	62	4.6
Restaurants	42	4.2	44	4.3	45	4.3	46	4.3	45	4.3	44	4.3
Shopping	29	4.0	29	4.0	30	4.0	29	4.0	30	4.0	32	4.0
Visitor info. services	53	4.4	52	4.4	52	4.4	52	4.4	53	4.5	53	4.4
Sightseeing	66	4.6	65	4.6	65	4.6	66	4.6	66	4.6	66	4.6
Tours and activities	60	4.5	60	4.5	61	4.5	61	4.5	61	4.5	62	4.5
Wildlife viewing	50	4.2	49	4.2	48	4.2	48	4.2	46	4.1	56	4.4
Transportation within Alaska	45	4.3	48	4.4	50	4.4	49	4.4	48	4.4	54	4.4
Friendliness of residents	69	4.6	70	4.7	71	4.7	71	4.7	70	4.7	75	4.7
Value for the money	32	4.1	34	4.1	35	4.1	36	4.1	34	4.1	39	4.2
Very likely to recommend Alaska	79%		80%		80%		81%		80%		81%	
Very likely to return to Alaska in next five years	40%		31%		28%		29%		25%		36%	

	Glacier Bay/ Gustavus		Haines		Hoonah		Petersburg		Wrangell	
Compared to expectations										
Much higher	27%		33%		28%		27%		30%	
Higher	41		36		38		43		36	
About as expected	28		29		30		29		29	
Value for the money, compared to other destinations										
Much better	14%		15%		14%		12%		18%	
Better	28		30		26		23		19	
About the same	45		41		48		54		49	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall exper. in Alaska	74%	4.7	74%	4.7	75%	4.7	82%	4.8	79%	4.8
Accommodations	60	4.5	49	4.4	65	4.6	50	4.3	40	4.2
Restaurants	44	4.3	37	4.2	47	4.3	29	4.1	26	4.0
Shopping	30	4.0	22	3.9	35	4.1	25	3.8	20	3.7
Visitor info. services	52	4.4	57	4.5	57	4.5	54	4.4	51	4.4
Sightseeing	68	4.6	70	4.7	70	4.6	69	4.7	66	4.6
Tours and activities	59	4.5	66	4.6	61	4.5	55	4.5	54	4.4
Wildlife viewing	57	4.3	68	4.5	49	4.2	69	4.6	68	4.5
Transportation within Alaska	50	4.4	52	4.4	53	4.4	41	4.2	39	4.3
Friendliness of residents	71	4.7	76	4.7	73	4.7	71	4.7	78	4.7
Value for the money	34	4.1	35	4.1	36	4.2	21	3.9	21	3.8
Very likely to recommend Alaska	80%		85%		85%		84%		77%	
Very likely to return to Alaska in next five years	29%		33%		25%		50%		45%	

Previous Alaska Travel
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Been to Alaska before for vacation	34%	25%	21%	22%	19%	30%
Average # of vacation trips (base: repeaters)	3.4	3.1	2.4	2.6	2.2	2.7
Previous mode of transportation used to enter/exit Alaska						
Air	72%	58%	56%	55%	52%	60%
Cruise	26	41	49	49	51	49
Highway	11	13	11	11	16	9
Ferry	3	4	3	5	3	3

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Been to Alaska before for vacation	21%	24%	14%	37%	40%
Average # of vacation trips (base: repeaters)	2.4	3.7	2.2	2.9	2.6
Previous mode of transportation used to enter/exit Alaska					
Air	52%	53%	59%	82%	65%
Cruise	59	36	56	8	20
Highway	8	25	12	12	12
Ferry	1	2	<1	7	16

Trip Planning
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Ave. # of months, trip decision	8.1	8.8	8.9	8.7	9.2	8.5
Ave. # of months, trip booking	5.4	6.3	6.5	6.5	6.6	6.2
Used Internet[1]	68%	66%	66%	66%	65%	68%
Booked over Internet[1]	42	35	35	35	33	32
Booked through travel agent[1]	52	65	69	68	70	63
Other Sources – Top 10[1]						
Friends/family	45%	43%	43%	44%	42%	42%
Cruise line/tour co.	38	52	56	56	57	55
Prior experience	26	20	17	18	14	23
Brochures	25	26	26	27	27	25
AAA	16	17	18	16	16	23
Travel guide/book	13	13	13	13	15	10
Television	11	15	15	16	17	10
Magazine	8	8	8	8	9	7
Milepost	6	3	2	1	2	2
Convention & Visitors Bureaus	5	4	4	4	4	4

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Ave. # of months, trip decision	8.8	9.0	10.5	8.3	8.8
Ave. # of months, trip booking	6.5	5.6	7.0	5.1	4.7
Used Internet[1]	75%	69%	69%	76%	71%
Booked over Internet[1]	41	31	31	45	37
Booked through travel agent[1]	67	65	76	33	33
Other Sources – Top 10[1]					
Friends/family	55%	38%	47%	49%	46%
Cruise line/tour co.	63	36	68	34	34
Prior experience	25	18	15	35	39
Brochures	32	29	31	43	46
AAA	16	28	16	18	21
Travel guide/book	16	25	13	15	21
Television	18	16	23	6	3
Magazine	8	7	15	7	5
Milepost	1	10	2	19	20
Convention & Visitors Bureaus	6	6	4	11	14

[1] Based to intercept respondents only.

Demographics
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Origin						
Western US	39%	34%	32%	32%	29%	41%
Southern US	19	20	21	21	21	24
Eastern US	13	14	15	16	15	13
Midwestern US	13	13	13	14	14	13
Canada	6	7	7	7	9	4
Other International	9	11	11	11	13	5
Other Demographics						
Average party size[1]	2.4	2.5	2.5	2.5	2.5	2.5
Male/female	50/50	47/53	45/55	45/55	45/55	48/52
Average age	51.6	53.0	53.1	52.8	52.8	54.3
Children in household	25%	24%	24%	22%	24%	24%
Retired/semi-retired	39	43	43	44	42	46
College graduate	59	59	59	58	59	59
Average income	$103,000	$105,000	$105,000	$104,000	$105,000	$110,000

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Origin					
Western US	33%	34%	33%	41%	37%
Southern US	22	20	24	15	19
Eastern US	18	20	19	20	20
Midwestern US	15	13	15	11	11
Canada	5	6	3	2	3
Other International	8	8	6	12	9
Other Demographics					
Average party size[1]	2.5	2.6	2.5	2.4	2.4
Male/female	46/54	45/55	46/54	56/44	54/46
Average age	52.8	53.7	53.6	55.0	54.2
Children in household	18%	16%	31%	18%	12%
Retired/semi-retired	44	49	39	49	52
College graduate	62	67	58	63	61
Average income	$105,000	$105,000	$107,000	$98,000	$92,000

[1] Based to intercept respondents only.

Visitor Expenditures, Per Person[1]
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Ave. in-state expend.	$934	$754	$690	$684	$703	$752
Expend. in location		480	177	150	159	198
Lodging		17	9	4	1	12
Tours/activity/ entertainment		208	86	51	87	46
Gifts/souvenirs/ clothing		184	66	77	63	46
Food/beverage		28	10	10	6	15
Rental cars/fuel/ transportation		8	3	5	1	2
Other		35	3	3	1	77

	Glacier Bay/ Gustavus	Haines	Hoonah	Petersburg	Wrangell
Ave. in-state expend.	$752	$878	$761	$1,418	$1,184
Expend. in location	12	76	53	302	115
Lodging	1	10	-	32	32
Tours/activity/ entertainment	4	34	31	22	15
Gifts/souvenirs/ clothing	1	10	16	27	35
Food/beverage	1	12	5	43	17
Rental cars/fuel/ transportation	-	9	-	13	6
Other	5	1	1	165	10

[1] Based to intercept respondents only.
Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: Interior Communities

In this chapter, visitors to Interior Alaska and the three most-visited communities are profiled. Definitions for each community and sample sizes are provided in the table below.

Market Definition and Sample Size
Interior Communities

Market	Definition	Sample Size	Maximum Margin of Error
Interior	Visited at least one destination in the Interior region, day and/or overnight	2,512	±2.0%
Denali	Visited Denali National Park, Denali State Park, Healy or Cantwell, day and/or overnight	1,973	2.2
Fairbanks	Visited Fairbanks, day and/or overnight	1,867	2.3
Tok	Visited Tok, day and/or overnight	489	4.5
Glennallen	Visited Glennallen, day and/or overnight	382	5.2

Compared to the overall market, Interior visitors were more likely to enter and exit the state by air and highway, and less likely to enter by cruise ship. Other unique aspects about this market include:

- Their average trip length was 12.6 nights, compared to 9.1 nights for the overall market.
- Eight of ten Interior visitors experienced Anchorage and Denali, significantly higher than the overall market visitation for these two communities.
- They were less likely to have been to Alaska previously; they are also less likely to return in the next five years.
- Compared to the overall market, Interior visitors had smaller average party sizes, higher average ages, more retirees, and the lowest average household income.

Unique characteristics about visitors to individual communities include:

- Denali visitors were more likely than other Interior visitors to be cruise passengers. They were less likely to be repeat visitors to Alaska, and they were much more likely to participate in wildlife viewing.
- About half of Fairbanks visitors overnighted on a cruise ship. They were significantly more likely to participate in cultural activities and day cruises than visitors to other communities.
- Tok and Glennallen visitors were most likely to have entered or exited the state by highway. They spent twice as long in Alaska as other visitors, and were significantly more likely to have used campgrounds.

Trip Purpose & Packages
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Trip Purpose						
Vacation/pleasure	82%	84%	91%	85%	89%	84%
Visiting friends/rel.	9	8	5	8	7	10
Business only	5	4	1	5	1	3
Business/pleasure	4	3	2	3	3	4
Purchased multi-day package						
Yes	69%	61%	71%	65%	34%	16%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	11%	11%	7%	7%	16%
Adventure tour	14	16	13	14	8	20
Wilderness lodge	13	24	24	20	21	28
Rail package	9	19	21	17	1	3
Motorcoach tour	5	10	10	14	17	8
Other	12	21	21	29	46	25

Transportation Modes
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Mode of Entry into Alaska						
Air	49%	68%	67%	66%	32%	60%
Cruise	45	21	24	23	11	3
Highway	4	10	7	10	52	34
Ferry	1	1	1	1	5	3
Mode of Exit from Alaska						
Air	49%	62%	59%	58%	31%	62%
Cruise	47	28	33	32	13	2
Highway	4	9	7	9	51	34
Ferry	1	1	1	1	5	3
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	51%	62%	57%	35%	4%
Train	19	50	61	54	27	3
Rental vehicle	14	23	21	18	13	48
Air	12	17	16	20	7	18
Personal vehicle	9	12	16	10	16	15
State ferry	3	6	5	5	15	14
Rental RV	2	5	5	4	5	10
Personal RV	2	4	3	4	19	20
None of the above	40	2	1	2	2	1
Don't know/refused	1	1	1	1	3	2

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Average length of stay in Alaska	9.1 nights	12.6 nights	12.5 nights	12.9 nights	17.7 nights	19.0 nights
Regions Visited						
Southeast	71%	62%	70%	69%	71%	47%
Southcentral	56	91	95	88	91	99
Interior	33	100	100	100	100	100
Southwest	3	3	3	3	5	6
Far North	3	7	7	9	11	11
Destinations Visited, Top 10						
Juneau	63%	53%	60%	59%	32%	18%
Ketchikan	53	47	55	53	24	11
Skagway	53	50	57	57	59	28
Anchorage	50	82	86	78	83	91
Denali	28	84	100	85	76	74
Fairbanks	24	72	73	100	80	66
Seward	21	39	43	35	39	61
Glacier Bay/Gustavus	27	34	38	39	18	9
Sitka	18	11	13	12	6	9
Whittier	14	25	27	24	24	34
Lodging Types Used						
Cruise ship	60%	49%	58%	55%	25%	6%
Hotel/motel	42	75	78	76	56	58
Lodge	19	44	51	45	19	17
Private home	12	12	9	11	11	17
B&B	6	9	9	8	10	23
Commercial campground	4	10	9	10	39	39
State/nat'l campground	3	8	7	7	22	24
Wilderness camping	2	4	3	3	9	11
Other	7	9	8	8	13	15

Statewide Activities – Top 10[1]
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Shopping	71%	78%	83%	81%	75%	72%
Wildlife viewing	53	77	85	77	69	70
City/sightseeing tours	44	49	57	52	39	37
Day cruises	40	59	68	63	49	59
Train	38	52	63	57	41	12
Hiking/nature walk	30	40	42	38	37	54
Museums	28	42	44	44	57	57
Native cultural tours/act.	20	31	36	36	15	12
Fishing	20	18	17	15	22	38
Historical/cultural attractions	18	25	26	28	18	25

[1] Based to intercept respondents only.

Activities in Community/Region[1]
Interior Communities

	Interior	Denali	Fairbanks	Tok	Glennallen
Wildlife viewing	65%	74%	14%	9%	5%
Birdwatching	13	14	4	3	3
Cultural activities	49	14	58	6	6
Gold panning/mine tour	28	-	34	-	-
Museums	17	6	18	6	4
Native cultural tours/act.	13	1	16	-	-
Historical/cultural attractions	13	4	13	-	1
City/sightseeing tours	31	25	24	3	
Day cruises	27	4	32	1	-
Hiking/nature walk	22	22	6	2	11
Camping	11	8	7	21	22
Shows/Alaska entertainment	9	8	3	-	-
Visiting friends/relatives	9	1	9	-	5
Salmon bake	8	1	9	3	-
Rafting	8	10	1	-	-
Dog sledding	7	6	2	-	-
Flightseeing	6	6	2	-	-
Northern Lights viewing	3	1	3	-	2
Fishing	2	<1	1	-	5
Guided	1	<1	<1	-	-
Unguided	1	-	1	-	4
Biking	1	<1	1	-	2
Hunting	1	<1	-	-	-
Kayaking/canoeing	1	<1	<1	-	-
Other	4	3	3	1	-

[1] Based to intercept respondents only.
Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings
Interior Communities

	All Visitors		Interior		Denali		Fairbanks		Tok		Glennallen	
Compared to expectations												
Much higher	25%		30%		30%		32%		30%		29%	
Higher	36		37		38		36		30		36	
About as expected	35		28		27		26		33		33	
Value for the money, compared to other destinations												
Much better	13%		13%		13%		13%		16%		17%	
Better	25		22		22		21		20		18	
About the same	48		46		46		47		46		45	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	70%	4.7	72%	4.7	73%	4.7	72%	4.7	68%	4.6	72%	4.7
Accommodations	54	4.4	47	4.3	48	4.4	48	4.4	36	4.2	32	4.1
Restaurants	42	4.2	35	4.1	36	4.1	35	4.1	30	4.1	25	4.0
Shopping	29	4.0	28	4.0	28	4.0	30	4.0	28	4.0	21	3.9
Visitor information services	53	4.4	57	4.5	58	4.5	58	4.5	64	4.6	61	4.6
Sightseeing	66	4.6	69	4.6	70	4.6	70	4.6	67	4.6	72	4.7
Tours and activities	60	4.5	60	4.5	61	4.5	61	4.5	60	4.5	56	4.4
Wildlife viewing	50	4.2	52	4.2	53	4.2	53	4.2	54	4.2	59	4.4
Transportation within Alaska	45	4.3	47	4.3	50	4.3	48	4.3	36	4.1	35	4.1
Friendliness of residents	69	4.6	71	4.7	72	4.7	74	4.7	73	4.7	69	4.6
Value for the money	32	4.1	28	4.0	29	4.0	30	4.0	30	3.9	26	3.9
Very likely to recommend Alaska as a vacation destination	79%		79%		80%		80%		77%		80%	
Very likely to return to Alaska in the next five years	40%		33%		27%		31%		34%		46%	

Previous Alaska Travel
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Been to Alaska before for vacation	34%	29%	22%	28%	41%	48%
Average # of vacation trips (base: repeaters)	3.4	2.6	2.1	2.5	2.9	3.2
Previous mode of transportation used to enter/exit Alaska						
Air	72%	72%	69%	74%	43%	59%
Cruise	26	25	35	28	24	13
Highway	11	15	14	13	42	29
Ferry	3	2	2	2	2	3

Trip Planning
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Ave. # of months, trip decision	8.1	9.3	9.8	9.5	10.7	10.6
Ave. # of months, trip booking	5.4	5.6	6.1	5.9	4.0	3.8
Used Internet[1]	68%	69%	68%	68%	61%	78%
Booked over Internet[1]	42	41	38	37	33	45
Booked through travel agent[1]	52	57	65	63	39	27
Other Sources – Top 10[1]						
Friends/family	45%	46%	47%	44%	31%	31%
Cruise line/ tour company	38	38	46	40	23	8
Prior experience	26	17	13	18	12	23
Brochures	25	30	33	28	29	40
AAA	16	22	25	22	21	30
Travel guide/book	13	21	23	20	30	34
Television	11	15	18	17	11	10
Magazine	8	10	11	8	8	15
Milepost	6	12	11	11	33	42
CVBs	5	8	8	7	12	15

[1] Based to intercept respondents only.

Demographics
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Origin						
Western US	39%	28%	25%	26%	29%	36%
Southern US	19	23	24	24	21	19
Eastern US	13	19	21	21	9	11
Midwestern US	13	18	19	18	17	13
Canada	6	4	3	3	13	5
Other International	9	8	8	8	12	15
Other Demographics						
Average party size[1]	2.4	2.2	2.3	2.2	2.1	2.4
Male/female	50/50	49/51	47/53	48/52	51/49	54/46
Average age	51.6	53.4	54.2	54.1	56.6	51.5
Children in household	25%	19%	17%	17%	9%	17%
Retired/semi-retired	39	46	48	48	62	47
College graduate	59	62	63	59	55	56
Average income	$103,000	$99,000	$99,000	$97,000	$83,000	$93,000

[1] Based to intercept respondents only.

Visitor Expenditures, Per Person[1]
Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Ave. in-state expend.	$934	$1,214	$1,193	$1,114	$1,171	$1,768
Expend. in location		395	231	335	100	115
Lodging		117	57	130	24	45
Tours/activity/ entertainment		54	72	34	4	8
Gifts/souvenirs/ clothing		49	25	41	11	8
Food/beverage		73	37	56	23	24
Rental cars/fuel/ transportation		50	9	52	37	29
Other		52	31	22	1	1

[1] Based to intercept respondents only. Note: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profiles: Southwest & Far North Communities

This chapter profiles visitors to Southwest, Kodiak, Far North, and Nome. Sample sizes are presented below.

Market Definition and Sample Size
Southwest & Far North Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southwest	Visited at least one destination in the Southwest region, day and/or overnight	242	±6.3%
Kodiak	Visited Kodiak, day and/or overnight	91	10.4
Far North	Visited at least one destination in the Far North region, day and/or overnight	240	6.3
Nome	Visited Nome, day and/or overnight	41	15.7

A small portion of the Alaska visitor market, 3 percent, visit either Southwest or Far North Alaska. However, each region hosts unique visitor markets. Extremely small sample sizes suggest caution when viewing the results in this chapter. The data can be considered a general indication of regional visitor characteristics.

Unique characteristics of Southwest visitors include:

- Southwest visitors stay longer than average (13 nights) and focus primarily on the Southwest and Southcentral regions during their visit.
- Southwest visitors are heavy users of hotels/motels, lodges, B&Bs and private homes compared to the average visitor.
- Fishing and wildlife viewing are dominant activities for Southwest visitors, and especially those going to Kodiak.
- Southwest visitors are a bit more satisfied and are much more likely to return to Alaska than the average visitor. They are twice as likely (66 versus 34 percent) to be repeat Alaska visitors.
- Southwest visitors have higher incomes, and the majority (56 percent) come from the Western U.S.

Far North visitors are different from other visitors in the following ways:

- Far North visitors stay almost a week longer than the average visitor (15 nights), and they travel widely to other regions of Alaska as well.
- Native cultural experiences, museums, and historical attractions are much more important to these visitors. In contrast, they are much less likely to sportfish or visit friends and relatives.
- Far North visitors tend to be repeat visitors to Alaska, plan well in advance, and originate from all regions of the U.S. and international places.

Trip Purpose & Packages
Southwest and Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Trip Purpose					
Vacation/pleasure	82%	68%	63%	76%	84%
Visiting friends/rel.	9	17	22	8	7
Business only	5	10	7	9	6
Business/pleasure	4	4	7	7	3
Purchased multi-day package					
Yes	69%	47%	36%	52%	61%
Package type (Base: non-cruise, purchased package)					
Fishing lodge	46%	50%	*	1%	*
Adventure tour	14	23	*	35	*
Wilderness lodge	13	20	*	20	*
Rail package	9	2	*	9	*
Motorcoach tour	5	-	*	10	*
Other	12	4	*	26	*

Transportation Modes
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Mode of Entry into Alaska					
Air	49%	91%	92%	80%	93%
Cruise	45	6	6	8	3
Highway	4	3	1	11	4
Ferry	1	<1	<1	1	-
Mode of Exit from Alaska					
Air	49%	95%	98%	70%	81%
Cruise	47	1	-	19	17
Highway	4	3	1	9	2
Ferry	1	1	1	1	<1
Used to Travel Between Communities[1]					
Motorcoach/bus	26%	9%	6%	39%	*
Train	19	11	14	36	*
Rental vehicle	14	22	23	30	*
Air	12	73	73	63	*
Personal vehicle	9	16	23	8	*
State ferry	3	8	14	4	*
Rental RV	2	1	-	<1	*
Personal RV	2	3	<1	6	*
None of the above	40	3	3	6	*
Don't know/refused	1	<1	-	1	*

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

Length of Stay, Destinations & Lodging Type
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Average length of stay in Alaska	9.1 nights	12.7 nights	12.2 nights	15.4 nights	13.7 nights
Regions Visited					
Southeast	71%	14%	17%	46%	39%
Southcentral	56	82	73	88	93
Interior	33	32	32	80	60
Southwest	3	100	100	12	41
Far North	3	11	11	100	100
Destinations Visited, Top 10					
Juneau	63%	10%	15%	35%	28%
Ketchikan	53	6	9	30	24
Skagway	53	8	8	33	23
Anchorage	50	75	65	81	91
Denali	28	24	25	61	51
Glacier Bay/Gustavus	27	10	15	25	30
Fairbanks	24	20	22	74	39
Seward	21	18	18	39	43
Sitka	18	4	9	8	11
Whittier	14	9	10	26	22
Lodging Types Used					
Cruise ship	60%	10%	11%	28%	25%
Hotel/motel	42	64	65	81	79
Lodge	19	30	22	30	11
Private home	12	22	29	17	14
B&B	6	17	21	19	15
Comm. campground	4	6	2	10	9
State/nat'l campground	3	5	4	6	5
Wilderness camping	2	10	5	8	11
Other	7	16	12	17	15

Statewide Activities – Top 10[1]
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Shopping	71%	61%	67%	68%	*
Wildlife viewing	53	71	83	71	*
City/sightseeing tours	44	25	26	51	*
Day cruises	40	24	24	54	*
Train	38	12	13	32	*
Hiking/nature walk	30	35	39	47	*
Museums	28	31	42	50	*
Native cultural tours/act.	20	15	13	38	*
Fishing	20	53	58	21	*
Historical/cultural attractions	18	12	29	29	*

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

Activities in Community/Region[1]
Southwest & Far North

	Southwest	Far North
Wildlife viewing	57%	31%
Birdwatching	25	13
Fishing	45	8
Guided	26	3
Unguided	21	6
Hiking/nature walk	26	15
Cultural activities	25	25
Gold panning/mine tour	-	5
Museums	12	7
Native cultural tours/act.	10	16
Historical/cultural attractions	10	8
Visiting friends/relatives	22	6
City/sightseeing tours	12	33
Camping	12	14
Flightseeing	10	8
Rafting	6	-
Day cruises	5	-
Hunting	4	2
Kayaking/canoeing	3	-
Shows/Alaska entertainment	3	3
Biking	1	-
Salmon bake	1	2
Northern Lights viewing	1	2
Other	5	7

[1] Based to intercept respondents only. Kodiak and Nome samples too small for analysis.
Note: Participation in shopping, Alaska Railroad and business were not recorded at the community/regional level.

Satisfaction Ratings
Southwest and Far North Communities

	All Visitors		Southwest		Kodiak		Far North		Nome	
Compared to expectations										
Much higher	25%		22%		28%		27%		18%	
Higher	36		34		31		39		41	
About as expected	35		40		38		28		35	
Value for the money, compared to other destinations										
Much better	13%		12%		11%		16%		22%	
Better	25		28		25		18		19	
About the same	48		52		58		49		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall experience in Alaska	70%	4.7	73%	4.7	72%	4.7	75%	4.7	89%	4.9
Accommodations	54	4.4	45	4.3	51	4.4	33	4.2	37	4.3
Restaurants	42	4.2	36	4.2	34	4.2	30	4.1	35	4.2
Shopping	29	4.0	36	4.0	39	3.9	26	3.9	49	4.1
Visitor information services	53	4.4	56	4.5	49	4.4	62	4.5	57	4.3
Sightseeing	66	4.6	71	4.7	67	4.6	71	4.7	79	4.7
Tours and activities	60	4.5	65	4.5	60	4.5	63	4.5	68	4.6
Wildlife viewing	50	4.2	68	4.5	65	4.5	57	4.4	66	4.5
Transportation within Alaska	45	4.3	45	4.3	45	4.3	41	4.2	53	4.2
Friendliness of residents	69	4.6	71	4.7	72	4.7	69	4.6	78	4.7
Value for the money	32	4.1	33	4.1	32	4.1	28	3.9	32	3.9
Very likely to recommend Alaska as a vacation destination	79%		79%		78%		85%		86%	
Very likely to return to Alaska in the next five years	40%		65%		63%		48%		66%	

Previous Alaska Travel
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Been to Alaska before for vacation	34%	66%	61%	49%	57%
Average # of vacation trips (base: repeaters)	3.4	4.2	4.3	2.9	3.1
Previous mode of transportation used to enter/exit Alaska					
Air	72%	94%	92%	80%	86%
Cruise	26	7	8	12	19
Highway	11	4	3	13	14
Ferry	3	2	5	4	5

Trip Planning
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Ave. # of months, trip decision	8.1	8.1	8.0	8.7	8.2
Ave. # of months, trip booking	5.4	4.6	4.6	4.8	5.1
Used Internet[1]	68%	70%	81%	74%	*
Booked over Internet[1]	42	52	74	48	*
Booked through travel agent[1]	52	27	20	46	*
Other Sources – Top 10[1]					
Friends/family	45%	44%	56%	44%	*
Cruise line/tour co.	38	10	15	25	*
Prior experience	26	51	63	39	*
Brochures	25	28	30	30	*
AAA	16	13	13	23	*
Travel guide/book	13	6	7	21	*
Television	11	5	3	12	*
Magazine	8	10	6	5	*
Milepost	6	9	4	18	*
CVBs	5	5	3	9	*

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

Demographics
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Origin					
Western US	39%	56%	58%	33%	45%
Southern US	19	14	11	19	13
Eastern US	13	15	14	19	25
Midwestern US	13	5	5	17	13
Canada	6	1	-	1	-
Other International	9	8	11	12	4
Other Demographics					
Average party size[1]	2.4	2.1	2.1	2.1	*
Male/female	50/50	63/37	58/42	57/43	54/46
Average age	51.6	50.4	53.2	54.5	56.6
Children in household	25%	24%	21%	20%	32%
Retired/semi-retired	39	37	35	39	53
College graduate	59	63	63	67	60
Average income	$104,000	$113,000	$112,000	$113,000	$126,000

[1] Based to intercept respondents only.

Visitor Expenditures, Per Person[1]
Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North	Nome
Ave. in-state expend.	$934	$2,357	$2,062	$1,695	$1,280
Expend. in location		1,334	*	290	*
Lodging		156	*	32	*
Tours/activity/ entertainment		63	*	51	*
Gifts/souvenirs/ clothing		30	*	17	*
Food/beverage		129	*	28	*
Rental cars/fuel/ transportation		46	*	28	*
Other		910	*	134	*

[1] Based to intercept respondents only. Note: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.
*Sample size too small for analysis.

Summary Profile: Sportfishing

About one in five (20 percent) Alaska visitors participated in sportfishing at some time during their Alaska trip. About four in ten fishing participants fished unguided while six in ten used guide services ranging from a half-day charter while on an Alaska cruise to a week-long fishing lodge package. This chapter profiles visitors who participated in sportfishing, segmented into guided and unguided. Sample sizes are presented in the table below.

Market Definition and Sample Size
Sportfishing

Market	Definition	Sample Size	Maximum Margin of Error
Guided fishing	Participated in guided fishing	396	±5.0%
Unguided fishing	Participated in unguided fishing	374	5.2

The sportfishing markets differed from the overall visitor market, as well as from each other, in the following ways.

- Guided fishing participants tended to be mostly vacation/pleasure visitors. Almost one in three unguided participants were in Alaska visiting friends and relatives.
- The unguided market accessed Alaska primarily by air, with 12 percent of them arriving by highway as well. One-quarter of the guided market were cruise passengers, although air was the preferred access mode for the majority of guided clients.
- Southcentral, Southeast and Interior regions were the primary destinations of the sportfishing market. When compared to the overall market, fishing participants were much more likely to visit the Southwest region: 7 percent of guided participants visited Southwest, and 9 percent of unguided participants visited Southwest, compared to 3 percent of the overall market.
- Fishing participants were typical of visitors overall in their levels of satisfaction, with unguided and guided participants expressing nearly identical levels of satisfaction.
- They were much more likely to be repeat visitors, and unguided participants are predominantly from the Western U.S. Guided fishing participants tended to be a bit more affluent, and unguided participants slightly less affluent, than the average Alaska visitor.
- Both guided and unguided fishing participants mentioned other activities while in Alaska, especially shopping and wildlife viewing. They were less likely than the overall market to participate in city/sightseeing tours, day cruises, train, and historical/cultural attractions.

Trip Purpose and Packages
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Trip Purpose			
Vacation/pleasure	82%	85%	63%
Visiting friends or relatives	9	8	29
Business	5	1	2
Business and pleasure	4	6	6
Purchased multi-day package			
Yes	69%	61%	18%
Package type (Base: non-cruise, purchased package)			
Fishing lodge package	46%	83%	67%
Adventure tour	14	5	13
Wilderness lodge package	13	7	3
Rail package	9	2	3
Motorcoach tour	5	1	1
Other	12	2	13

Transportation Modes
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Mode of Entry into Alaska			
Air	49%	72%	83%
Cruise	45	21	2
Highway	4	6	12
Ferry	1	1	3
Mode of Exit from Alaska			
Air	49%	67%	86%
Cruise	47	27	2
Highway	4	5	10
Ferry	1	1	2
Used to Travel Between Communities[1]			
Motorcoach/bus	26%	21%	3%
Train	19	18	4
Rental vehicle	14	25	22
Air	12	23	29
Personal vehicle	9	11	32
State ferry	3	3	6
Rental RV	2	3	5
Personal RV	2	4	7
None of the above	40	23	15
Don’t know/refused	1	1	2

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Average length of stay in Alaska	9.1 nights	10.2 nights	14.5 nights
Regions Visited			
Southeast	71%	57%	33%
Southcentral	56	68	76
Interior	33	32	29
Southwest	3	7	9
Far North	3	3	3
Destinations Visited, Top 10			
Juneau	63%	40%	12%
Ketchikan	53	36	14
Skagway	53	35	9
Anchorage	50	58	64
Denali	28	27	19
Fairbanks	24	20	16
Seward	21	31	31
Glacier Bay	27	15	5
Sitka	18	14	5
Whittier	14	16	15
Lodging Types Used			
Cruise ship	60%	34%	4%
Hotel/motel	42	50	35
Lodge	19	34	16
Private home	12	15	46
B&B	6	12	12
Commercial campground	4	8	15
State/national campground	3	4	10
Wilderness camping	2	3	9
Other	7	11	15

Visitor Activities – Top 10[1]
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Shopping	71%	63%	64%
Wildlife viewing	53	61	59
City/sightseeing tours	44	30	15
Day cruises	40	35	21
Train	38	26	7
Hiking/nature walk	30	30	36
Museums	28	24	25
Native cultural tours/activities	20	17	7
Fishing	20	100	100
Historical/cultural attractions	18	16	11

[1] Based to intercept respondents only.

Satisfaction Ratings
Sportfishing

	All Visitors		Guided Sportfishing		Unguided Sportfishing	
Compared to expectations						
Much higher	25%		26%		20%	
Higher	36		36		32	
About as expected	35		34		42	
Value for the money, compared to other destinations						
Much better	13%		14%		13%	
Better	25		24		26	
About the same	48		46		48	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
Overall experience in Alaska	70%	4.7	70%	4.7	69%	4.7
Accommodations	54	4.4	49	4.4	46	4.3
Restaurants	42	4.2	37	4.2	31	4.1
Shopping	29	4.0	24	4.0	25	4.0
Visitor information services	53	4.4	50	4.4	52	4.4
Sightseeing	66	4.6	66	4.6	65	4.6
Tours and activities	60	4.5	57	4.4	56	4.4
Wildlife viewing	50	4.2	54	4.4	56	4.4
Transportation within Alaska	45	4.3	43	4.3	36	4.1
Friendliness of residents	69	4.6	66	4.6	66	4.6
Value for the money	32	4.1	31	4.0	31	4.0
Very likely to recommend Alaska as a vacation destination	79%		78%		79%	
Very likely to return to Alaska in the next five years	40%		53%		71%	

Previous Alaska Travel
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Been to Alaska before for vacation	34%	48%	67%
Average # of vacation trips (base: repeat travelers)	3.4	4.1	4.8
Previous mode of transportation used to enter/exit Alaska			
Air	72%	81%	82%
Cruise	26	19	7
Highway	11	8	12
Ferry	3	2	4

Trip Planning
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Ave. # of months, trip decision	8.1	9.6	8.3
Ave. # of months, trip booking	5.4	5.7	3.9
Used Internet[1]	68%	73%	72%
Booked over Internet[1]	42	51	58
Booked through travel agent[1]	52	39	16
Other Sources – Top 10[1]			
Friends/family	45%	46%	65%
Cruise line/tour company	38	29	2
Prior experience	26	38	51
Brochures	25	24	21
AAA	16	15	9
Travel guide/book	13	13	9
Television	11	11	3
Magazine	8	8	9
Milepost	6	10	14
Convention & Visitors Bureaus	5	6	7

[1] Based to intercept respondents only.

Demographics
Sportfishing

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Origin			
Western US	39%	45%	60%
Southern US	19	18	11
Eastern US	13	10	8
Midwestern US	13	19	13
Canada	6	4	2
Other International	9	3	5
Other Demographics			
Average party size[1]	2.4	2.8	2.5
Male/female	50/50	63/37	65/35
Average age	51.6	49.7	48.1
Children in household	25%	28%	27%
Retired/semi-retired	39	63	63
College graduate	59	36	37
Average income	$103,000	$115,000	$94,000

[1] Based to intercept respondents only.

Summary Profiles:

Adventure, B&B, Independent Cruisers, Native Culture, Repeat Visitors

This chapter profiles the visitor markets for each of five unique markets: Adventure, B&B, Independent Cruisers, Native Culture, and Repeat Visitors. A description of each of these markets and sample sizes are presented in the table below.

Market Definition and Sample Size
Selected Visitor Markets

Market	Definition	Sample Size	Maximum Margin of Error
Adventure Package	Purchased a multi-day adventure travel package i.e. hiking, biking, kayaking, rafting	108	±10.0%
B&B	Spent at least one night in a B&B	472	4.6
Independent Cruisers	Spent nights in Alaska on their own before or after cruise or cruisetour package	363	5.3
Native Culture[1]	Participated in one or more Native cultural tours/activities	482	4.6
Repeat Visitors	Traveled to Alaska previously	2,291	2.1

[1] Intercept respondents only.

The "adventure package" market is defined as having purchased a multi-day travel package that focused on adventure-oriented activities such as hiking, biking, kayaking, and rafting. Results should be viewed with some caution as the sample size is significantly smaller than other subgroups profiled in this report.

- Adventure package visitors accessed Alaska almost exclusively by air, focused largely on the Southcentral and Interior regions, and tended to stay in Alaska longer than the average visitor.
- Nearly one-half of adventure package visitors had been to the state before. They were more likely to return to Alaska compared to the average visitor.
- Among all visitor groups, they rated their overall experience very highly (76 percent are very satisfied). For most, the trip exceeded their expectations. They were less likely to give high ratings to value for the money.

The B&B market (6 percent of all Alaska visitors) has a few unique characteristics, but otherwise tends to reflect the total visitor market.

- B&B visitors stayed longer (12 versus 9 nights), were much more likely to be repeat Alaska travelers, and traveled primarily in the Southcentral and Interior regions.
- They were more highly educated (68 percent college graduates), and more frequent users of the Internet for planning their Alaska trip.

- B&B users accessed Alaska almost entirely by air.

The "Independent Cruise" market (12 percent of the total cruise market) is defined as cruise passengers who spent time traveling on their own in Alaska, before or after their cruise or cruise/tour package.

- Independent cruisers spent an average of 10.8 nights in Alaska. They stayed in hotels/motels and lodges significantly more than the overall market.
- Almost all of them visited Southeast and Southcentral Alaska, with about one-half venturing into the Interior as well.
- They were more likely than the overall market to be first-time Alaska visitors; one in three said they were very likely to return in the next five years.
- Independent cruisers reported an average household income of $124,000, significantly higher than the overall market.

The "Native Culture" market is defined as having participated in a Native cultural tour or activity at any point during their Alaska trip. They represented 20 percent of all visitors.

- Those who participated in Native cultural experiences rated their overall trip the highest among these special categories of visitors, and are also more likely to recommend Alaska to others.
- This market tended to decide on their Alaska trip well in advance, and used many sources of information to plan their trip.
- They were also much more likely to be first-time Alaska visitors (80 vs. 66 percent).

Repeat visitors had visited Alaska previously, whether for vacation or business. They represented 34 percent of the total visitor market.

- Repeat visitors were less likely to be traveling for vacation/pleasure (65 percent, versus 82 percent of the overall market). They were twice as likely to be VFRs or business-related visitors.
- Corresponding to their higher proportion of VFRs, repeat visitors were frequent users of private homes as accommodations (23 percent).
- This market took less advance time to plan and relied heavily on past experience and friends/relatives for their Alaska information.
- Repeat travelers were much more likely than the overall market to intend to return to Alaska.
- Over half of repeat visitors (57 percent) were from the Western US, compared to 39 percent of the overall market.

Trip Purpose & Packages
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Trip Purpose						
Vacation/pleasure	82%	90%	80%	98%	92%	65%
Visiting friends/rel.	9	6	12	1	6	18
Business only	5	2	2	-	1	11
Business/pleasure	4	2	7	1	1	6
Purchased multi-day package						
Yes	69%	100%	34%	100%	84%	46%
Package type (Base: non-cruise, purchased package)						
Fishing lodge	46%	-%	33%	n/a	*	61%
Adventure tour	14	100	28	n/a	*	13
Wilderness lodge	13	-	21	n/a	*	11
Rail package	9	-	4	n/a	*	5
Motorcoach tour	5	-	3	n/a	*	2
Other	12	-	11	n/a	*	9

* Sample size too small for analysis.

Transportation Modes
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Mode of Entry into Alaska						
Air	49%	98%	86%	62%	53%	66%
Cruise	45	-	6	36	45	26
Highway	4	1	5	1	2	7
Ferry	1	1	3	1	1	1
Mode of Exit from Alaska						
Air	49%	97%	86%	42%	38%	67%
Cruise	47	-	8	57	60	26
Highway	4	1	4	<1	1	6
Ferry	1	3	2	<1	1	1
Used to Travel Between Communities[1]						
Motorcoach/bus	26%	*	14%	54%	46%	13%
Train	19	*	16	44	41	9
Rental vehicle	14	*	58	32	11	20
Air	12	*	26	11	11	18
Personal vehicle	9	*	14	2	4	16
State ferry	3	*	14	2	4	4
Rental RV	2	*	3	3	2	1
Personal RV	2	*	<1	<1	1	3
None of the above	40	*	3	9	33	35
Don't know/refused	1	*	<1	-	<1	1

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

Length of Stay, Destinations & Lodging Type
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Average length of stay in Alaska	9.1 nights	13.1 nights	11.7 nights	10.8 nights	9.9 nights	9.9 nights
Regions Visited						
Southeast	71%	18%	36%	95%	84%	51%
Southcentral	56	83	86	93	58	61
Interior	33	48	52	46	48	28
Southwest	3	27	9	2	3	6
Far North	3	21	9	7	5	4
Destinations Visited, Top 10						
Juneau	63%	11%	25%	92%	79%	39%
Ketchikan	53	5	19	86	74	35
Skagway	53	4	19	82	64	29
Anchorage	50	78	79	90	49	55
Denali	28	36	43	44	45	18
Fairbanks	24	22	30	29	30	19
Seward	21	38	50	41	17	19
Glacier Bay	27	4	11	52	40	16
Sitka	18	4	12	33	25	16
Whittier	14	11	24	29	12	11
Lodging Types Used						
Cruise ship	60%	-%	14%	100%	76%	33%
Hotel/motel	42	71	58	88	49	46
Lodge	19	35	27	26	36	16
Private home	12	15	21	7	6	23
B&B	6	31	100	10	5	9
Commercial campground	4	12	5	1	2	6
State/nat'l campground	3	9	4	1	2	4
Wilderness camping	2	25	5	1	1	4
Other	7	24	14	10	4	9

Activities – Top 10[1]
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Shopping	71%	75%	73%	77%	85%	59%
Wildlife viewing	53	88	72	78	82	48
City/sightseeing tours	44	21	22	60	68	26
Day cruises	40	27	47	55	54	27
Train	38	8	22	57	54	22
Hiking/nature walk	30	63	54	39	42	27
Museums	28	32	53	46	47	23
Native cultural tours/act.	20	12	19	35	100	11
Fishing	20	30	39	11	13	30
Historical/cultural attractions	18	19	22	27	41	14

[1] Based to intercept respondents only.

Satisfaction Ratings
Selected Visitor Markets

	All Visitors		Adventure Package		B&B		Independent Cruisers		Native Culture		Repeat	
Compared to expectations (Base: excludes business-only travelers)												
Much higher	25%		27%		20%		24%		29%		17%	
Higher	36		47		36		41		32		31	
About as expected	35		23		40		30		37		48	
Value for the money, compared to other destinations (Base: excludes business-only travelers)												
Much better	13%		9%		11%		14%		12%		14%	
Better	25		23		18		25		26		26	
About the same	48		55		50		44		47		48	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	70%	4.7	76%	4.8	70%	4.7	70%	4.7	75%	4.7	68%	4.6
Accommodations	54	4.4	31	4.1	41	4.2	47	4.3	60	4.5	52	4.4
Restaurants	42	4.2	25	4.0	29	4.0	35	4.2	51	4.4	42	4.2
Shopping	29	4.0	26	3.7	19	3.9	21	3.8	31	4.1	30	4.0
Visitor information services	53	4.4	59	4.4	55	4.4	54	4.5	60	4.5	52	4.4
Sightseeing	66	4.6	83	4.8	66	4.6	68	4.6	73	4.7	63	4.6
Tours and activities	60	4.5	69	4.7	57	4.5	58	4.5	65	4.6	57	4.5
Wildlife viewing	50	4.2	66	4.5	56	4.4	49	4.3	49	4.1	53	4.3
Transportation within Alaska	45	4.3	46	4.3	40	4.2	52	4.4	51	4.4	43	4.3
Friendliness of residents	69	4.6	59	4.5	68	4.6	74	4.7	78	4.7	67	4.6
Value for the money	32	4.1	22	3.9	23	3.9	31	4.0	41	4.2	33	4.1
Very likely to recommend Alaska as a vacation destination	79%		76%		77%		81%		84%		80%	
Very likely to return to Alaska in the next five years	40%		51%		48%		31%		26%		64%	

Previous Alaska Travel
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Been to Alaska before for vacation	34%	45%	50%	24%	20%	100%
Average # of vacation trips (base: repeaters)	3.4	3.7	3.7	2.7	2.5	3.4
Previous mode of transportation used to enter/exit Alaska						
Air	72%	*	89%	67%	65%	72%
Cruise	26	*	10	49	33	26
Highway	11	*	8	11	8	11
Ferry	3	*	2	4	5	3

Trip Planning
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Ave. # of months, trip decision	8.1	8.5	7.8	8.6	9.1	7.0
Ave. # of months, trip booking	5.4	5.2	4.7	6.0	6.4	4.4
Used Internet[1]	68%	81%	85%	78%	71%	67%
Booked over Internet[1]	42	42	71	49	38	50
Booked through travel agent[1]	52	33	28	70	66	35
Other Sources – Top 10[1]						
Friends/family	45%	27%	48%	57%	49%	39%
Cruise line/tour co.	38	11	16	65	54	22
Prior experience	26	30	40	24	15	68
Brochures	25	32	37	30	31	18
AAA	16	11	23	19	22	11
Travel guide/book	13	27	23	15	19	6
Television	11	<1	5	15	22	4
Magazine	8	11	11	14	12	6
Milepost	6	8	21	4	4	8
CVBs	5	<1	11	2	7	5

[1] Based to intercept respondents only.

Demographics
Selected Visitor Markets

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat
Origin						
Western US	39%	30%	39%	30%	32%	57%
Southern US	19	23	17	25	21	16
Eastern US	13	11	13	18	18	8
Midwestern US	13	20	15	15	19	11
Canada	6	4	5	3	4	5
Other International	9	13	10	9	7	3
Other Demographics						
Average party size[1]	2.4	2.5	2.4	2.5	2.3	2.2
Male/female	50/50	61/39	56/44	50/50	46/54	56/44
Average age	51.6	47.0	51.3	53.9	54.2	52.8
Children in household	25%	23%	21%	23%	19%	23%
Retired/semi-retired	39	34	36	45	46	41
College graduate	59	71	68	68	59	60
Average income	$103,000	$100,000	$99,000	$124,000	$106,000	$108,000

[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 summer period consists of May 1 through September 30.

Exit Points and Data Sources
AVSP V - Summer 2006

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
Little Gold Border Station (Top of the World Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Cruise Ship		
All southbound ships	Cruise ship passengers sailing southbound from Alaska ports to Canada/US ports	Cruise Line Agencies of Alaska
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 50,000 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 - Summer 2006

Exit Mode	Passengers Tallied
Domestic Air	37,220
International Air	8,010
Highway	3,499
Ferry	974
Cruise ship[1]	0
Total	**49,703**

[1] As in previous AVSP studies, 100 percent of cruise passengers were assumed to be out-of-state visitors.

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 station on three highways: Alcan, Haines Highway, and Klondike

[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.

Highway. Because of the time required to access the border station at the Top of the World Highway, the survey station was set up on the road before drivers boarded the ferry at Dawson City. There was no risk of compromising the sample, because all highway travelers crossing the border necessarily drive on to Dawson City.

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, cruise passenger tour data, and interviews with border officials. Because visitor traffic among these two highway modes is so small, representing 0.2 percent of all visitors, they are combined with other highway traffic for the purposes of the visitor volume estimate.

Cruise Ship

No tallies were conducted for cruise passengers. As in previous AVSP studies, all cruise passengers were assumed to be out-of-state visitors.

Ferry

As in the other exit modes, surveyors would ask passengers aboard sampled ferry voyages exiting Alaska whether they were a resident or visitor. Nearly 1,000 tallies were conducted of ferry passengers during the summer 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. (It was not known until after the summer sample period whether this data would be accessible.)

Survey Population

The AVSP Summer 2006 survey was conducted with out-of-state visitors who were exiting Alaska between May 1 and September 30, 2006. Seasonal residents, such as cannery and 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 - Summer 2006

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
Cruise ship	Boarding cruise ship at its final Alaska port-of-call
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 Summer 2006 survey staff included 30 surveyors based in the following locations: Anchorage, Fairbanks, Juneau, Ketchikan, Sitka, Whitehorse, Dawson City, 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 Summer 2006 staff included surveyors who spoke German, Japanese, Cantonese, Spanish, Portuguese, and American Sign Language. 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 every survey location, online invitation cards were also distributed.

Survey Locations
AVSP V - Summer 2006

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)
	Dawson City (Top of the World Highway)
Cruise Ship	
	Ketchikan cruise ship docks
	Juneau cruise ship docks
	Skagway cruise ship docks
	Sitka cruise ship lightering docks
	Hoonah cruise ship lightering docks
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 Summer 2006 survey program included 2,703 intercept surveys (in-person interviews) and 2,956 surveys completed online, for a total of 5,659 surveys. The total sample exceeded the target sample of 5,000 by a significant margin, largely due to the higher-than-expected online response rate. The following table shows the number of completed surveys, by exit mode.

Sample Sizes, by Mode
AVSP V – Summer 2006

Exit Mode	Intercept	Online	Total
Domestic Air	1,528	1,917	3,445
International Air	274	299	573
Highway	246	85	331
Cruise ship	503	475	978
Ferry	152	180	332
Total	**2,703**	**2,956**	**5,659**

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 (for which the study team had extensive records from the 2005 *Alaska Travelers Survey*). The sample targets were adjusted to ensure appropriate sample sizes. For example, visitors exiting by ferry represent only 0.7 percent of all visitors. If they were represented proportionally in the sample, the target would be too small for analysis (18 out of 2,500 surveys). The ferry target became 150 surveys. Similarly, the international air sample was adjusted upwards because there was particular interest in this market on the part of the State and the visitor industry. These visitors represent 1.0 percent of total exiting visitors, but had a target of 200 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 (92 percent) and international air passengers (82 percent).

Highway

The highway sample was based on monthly traffic levels at each of the four border stations. Survey stations were set up adjacent to the border station on three highways (Alcan, Haines Highway, and Klondike Highway), and near the Dawson City ferry dock on the Top of the World Highway. Surveyors would work in four to five-hour shifts on each sample day. When motorists had completed their Customs interview (or before boarding the ferry at Dawson City), 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 (83.6 percent).

Cruise Ship

The cruise ship sample was selected based on the expected volume of passengers at each "last port of call" in Alaska – that is, every port that represented the final stop before the ship exited Alaska, and continued on to non-Alaska ports. Cruise Line Agencies of Alaska provided the 2006 cruise ship schedule, including each ship's route and capacity. Although Ketchikan represented the bulk of exiting passengers, the 2006 cruise ship schedule included several other last-call ports: Juneau, Skagway, Sitka, and Hoonah (Icy Strait Point). The appropriate number of surveys was conducted in each location to reflect actual exiting volume. Survey targets also reflected passenger volume by cruise line – for example, if 30 percent of all exiting cruise passengers were expected to be sailing with Princess Cruises, 30 percent of the targeted ships were Princess ships.

Surveyors would station themselves outside the targeted ship several hours prior to boarding. They approached randomly selected passengers to complete surveys before they boarded their ship. Where necessary, surveyors were given special permission by private dock owners to interview passengers in the embarkation areas.

Ferry

Ferry passengers were surveyed onboard Alaska Marine Highway vessels bound for Bellingham and Prince Rupert. Sampled vessels were selected randomly by month among all southbound voyages. Surveyors would approach randomly selected passengers during sample periods in public areas of the ferry. Because surveyors sailed along with passengers, there was ample time to survey passengers who purchased staterooms as well as those who did not.

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 Governor 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, ferry voyages, cruise sailings, etc. as intercept respondents.

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 1,630 qualified respondents – that is, out-of-state residents who were exiting Alaska. Of this number, 130 declined to be interviewed. The response rate for Domestic Air is 1,500 divided by 1,630, or 92.0 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.) For example, there were 11,011 cards distributed to visitors exiting the state via Domestic Air. Of these visitors, 2,111 completed the online survey. The response rate for Domestic Air online respondents is 2,111 divided by 11,011, or 19.2 percent.

Response Rates, by Mode
AVSP V - Summer 2006

Exit Mode	Intercept	Online
Domestic Air	92.0%	19.2%
International Air	81.5%	20.3%
Highway	83.6%	13.5%
Cruise ship	72.3%	13.7%
Ferry	89.0%	13.1%
Total	**85.6%**	**17.5%**

The overall response rate for the intercept sample was 85.6 percent. Rates differed somewhat by mode, as expected. Domestic air respondents generally show the highest intercept response rates because they often have plenty of time (and little to do) while they are waiting for their flight. Ferry passengers are also almost always willing to be interviewed, as they are onboard for significant periods of time. Cruise passengers show slightly lower response rates – they are approached as they return to their ship, occasionally in inclement weather, and can be anxious to embark.

Online response rates also correspond to expectations for each exit mode. Ferry, highway, and cruise ship passengers are often several days from returning home when they receive the invitation card. This makes them more likely to lose the card or forget about it when compared to air passengers, who are usually returning home that same day.

Although response rates differ by mode and by survey method, the data is not adversely affected. As explained in **Data Weighting**, above, 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, sometimes in rainy, windy, or buggy weather, 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 far exceeded expectations for the online sample. Based on a test conducted in the summer of 2005, the study team projected a response rate of 12 percent for the Domestic Air mode. The actual response rate for Domestic Air was 19.2 percent, and 17.5 percent for all modes combined. The higher response rate likely resulted from the high quality of the invitation cards and the generous incentives offered.

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 monthly drawing to win a Denali Park Resorts package. All summer respondents were also entered into a drawing for a Princess cruise to Alaska, Mexico, 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 ±1.4 percent for the overall sample and ±1.9 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 – Summer 2006

Survey Method	Sample Size	Maximum Margin of Error
Intercept	2,703	±1.9%
Online	2,956	n/a
Total	**5,659**	**1.4**

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 ±1.4 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 5,659, the maximum error decreases to ±1.1 percent. This margin would apply, for example, to the survey result for trip purpose – 82 percent of all visitors said they were traveling for vacation/pleasure. 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 ±0.77 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 235 surveys of visitors who exited the state by ferry, or 4.0 percent of all surveys. However, this market represents only 0.7 percent of all visitors. In order for these visitors to be properly represented in the overall visitor market, their surveys are "weighted down." Similarly, visitors exiting by cruise ship represented 17.4 percent of all surveys, but 46.5 percent of all exiting visitors. Their data is "weighted up." All AVSP data was weighted by exit mode to reflect actual traffic volumes.

Online data was weighted by one additional factor: the geographic distribution of visitor origin. Online respondents from international countries and from certain geographical regions of the US were slightly less likely to respond to the survey. Because the intercept method ensured accurate distribution by origin, online data was weighted to reflect origin 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 targeted the same visitor population as the intercept survey – invitation cards were distributed to visitors on the same flights, ferry vessels, cruise ships, and during the same highway periods as intercept respondents. However, 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 far exceeded expectations at 18 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 a wide range of demographic variables between the two samples, including gender, origin, age, income, and education. Only origin presented a potential bias; this was addressed with weighting, as described above.

The results to other survey questions were carefully compared to detect any sign of additional bias among online respondents. 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."

Despite the fact that some online results were not used in this report, it is important to recognize the value of introducing the online survey to the AVSP process. It increased the overall sample size for most questions, from 2,703 to 5,659. The large sample size was critical to providing useful data at the subgroup level, including communities, region of origin, and other subgroups. In addition, the intercept-only samples remain large enough in most cases to ensure significant confidence in the data.