
Section VI: Selected Summary Profiles

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 Communities¹				
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 Activities¹ 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 Sources¹				
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, Overall¹ 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 Category¹ 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 Person¹

	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 Communities¹			
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 10¹ 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 10¹			
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 Communities¹						
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 10¹ 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 10¹						
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 Communities¹						
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

Activities¹ 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 10¹						
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 Communities¹						
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 10¹ 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 10¹						
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 Communities¹						
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 Communities¹						
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 10¹
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/Region¹ 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 10¹						
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 10¹					
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 Person¹
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 Communities¹						
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 Communities¹						
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 10¹ 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/Region¹ 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 10¹						
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 10¹						
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 Person¹
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 on 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 Communities¹						
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 10¹ 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/Region¹
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 10¹						
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 Person¹
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 on 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 Communities¹					
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 10¹ 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/Region¹ 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 10¹					
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 Person¹
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 Communities¹			
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 10¹ 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 10¹			
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 Communities¹						
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 10¹ 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 10¹						
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.