
AVSP VI – Fall/Winter 2011-12

**Section IV:
Visitor Profile**

Introduction

This section presents results of the visitor survey, conducted with out-of-state visitors exiting Alaska between October 2011 and April 2012. Visitors were surveyed at six exit points: five airports and the Ketchikan ferry terminal.

A total of 1,364 randomly-selected visitors were surveyed, for a maximum margin of error of ± 2.7 percent at the 95 percent confidence level.¹ All data was weighted to reflect actual traffic volumes by mode of transportation. The survey methodology is explained in detail in the final section of this report.

This primary analysis is organized into the following categories:

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

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

TABLE 4.1 – Trip Purpose Market Definition and Sample Sizes

Market	Definition	Sample Size	Maximum Margin of Error
All Visitors	All respondents	1,364	$\pm 2.7\%$
Vacation/Pleasure	Main purpose of trip was vacation or pleasure	276	5.9
Visiting Friends/Relatives (VFR)	Main purpose of trip was to visit friends or relatives	457	4.6
Business	Main purpose of trip was business or business and pleasure	631	3.4

This section includes comparisons to 2006-07 survey results. There was a change in methodology between the two survey periods: fall/winter 2011-12 excluded surveying of highway visitors, due to safety concerns and the small size of the market. Because only 3.7 percent of the 2006-07 fall/winter visitor market exited Alaska via highway, survey results are still largely comparable. However, it is important to keep this difference in mind when considering differences between the two periods.

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

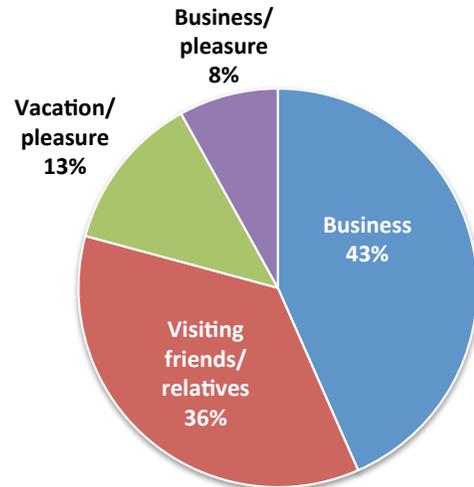
Trip Purpose and Packages

Trip Purpose

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

Fall/winter visitors were most likely to be traveling for business at 43 percent, followed by visiting friends/relatives at 36 percent. Vacation/pleasure accounted for 13 percent, and business/pleasure accounted for 8 percent.

CHART 4.1 - Trip Purpose



Compared to 2006-07, fall/winter visitors in 2011-12 were slightly more likely to be traveling for business only (43 percent, up from 39 percent), and slightly less likely to be visiting friends/relatives (36 percent, down from 42 percent). Rates for vacation/pleasure and business/pleasure changed by only 1 percent.

A visitor’s trip purpose has a major impact on their activities, expenditures, length of stay, trip planning, and other variables. The remainder of tables in this chapter provide results by trip purpose, with business and business/pleasure combined.

TABLE 4.2 - Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors	
	06-07	11-12
Business only	39	43
Visiting friends/relatives	42	36
Vacation/pleasure	12	13
Business/pleasure	7	8

Packages

Four percent of fall/winter visitors participated in a multi-day package at some point in their Alaska trip, including 29 percent of vacation/pleasure visitors and 1 percent or less of VFRs and business travelers. Package purchase rates resembled those of 2006-07.

**TABLE 4.3 - Purchase of Multi-Day Packages
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Purchased package	4	4	27	29	1	<1	1	1
Did not purchase package	94	96	71	71	97	100	97	99
Don't know	2	<1	2	-	1	-	2	<1

By far the most popular type of fall/winter package was Northern Lights packages, representing 53 percent of visitors who purchased packages. Thirteen percent purchased hunting packages. Very few visitors purchased rental car/RV, skiing, dog sledding, fishing lodge, motorcoach, or adventure packages. The "other" category included Elder Hostel tours and a polar bear viewing tour.

The definitions of the various packages changed in 2011-12, preventing effective comparison to the previous survey.

CHART 4.2 – Package Type

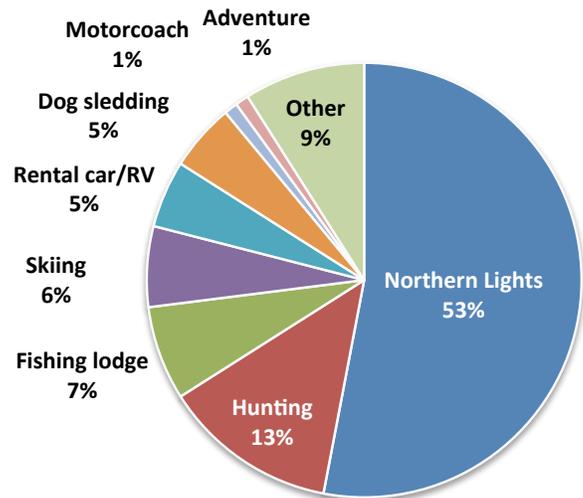


TABLE 4.4 – Package Type, By Trip Purpose, 2011-12 (%)
Base: Purchased Package

	All Visitors (n=152)	Vacation/ Pleasure (n=144)
Northern Lights package	53	60
Hunting package	13	15
Fishing lodge package	7	7
Skiing package	6	7
Rental car/RV package	5	-
Dog sledding package	5	6
Motorcoach tour	1	1
Adventure tour	1	-
Other	9	4

Note: Sample sizes for VFRs and Business respondents who purchased packages were too small for analysis.

When asked what portions of their trip were included in the package, the most common answer was lodging (99 percent), followed by meals at 74 percent, tours at 64 percent, air at 58 percent, and bus/motorcoach at 50 percent. Packages were much less likely to include fishing (11 percent), railroad (11 percent), and vehicle/RV rental (9 percent). “Other” components included hunting and skiing.

TABLE 4.5 – Portions of Trip Included in Package, By Trip Purpose, 2011-12 (%)
Base: Purchased Package

	All Visitors (n=152)	Vacation/ Pleasure (n=144)
Lodging	99	99
Meals	74	79
Tours	64	69
Air	58	57
Bus/motorcoach	50	57
Railroad	11	12
Fishing	11	10
Vehicle/RV rental	9	9
Other	24	23

Note: Sample sizes for VFR and Business respondents who purchased packages were too small for analysis.

Modes of Transportation

The following table shows how visitors entered the state, exited the state, and traveled around the state. Nearly all fall/winter visitors enter and exit the state via air, with only 1 percent using the ferry.

These results reflect the deliberate exclusion of the highway as a sampled mode in 2011-12. For that reason the percentage of visitors exiting via highway dropped from 3 to 0 percent between 2006-07 and 2011-12, *among those surveyed*. The chart on page I-2 (repeated on page III-2) shows visitor exits according to traffic data and more accurately reflects transportation mode usage (with 4 percent of visitors exiting via highway).

Visitors tended to use personal vehicle, air, and rental vehicle to travel between communities within Alaska. However, the majority (55 percent) did not report additional transportation modes, because they only visited one community.

There were slight shifts in responses compared to 2006-07, with usage of the most popular modes (personal vehicle, air, and rental vehicle) each dropping by several percentage points.

TABLE 4.6 - Transportation Modes, By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Mode of Entry into Alaska								
Air	96	98	84	95	97	98	97	99
Highway	4	1	14	3	2	1	2	1
Ferry	1	1	2	1	1	1	<1	<1
Mode of Exit from Alaska								
Air	97	99	85	99	98	99	99	100
Highway ¹	3	-	12	-	2	-	1	-
Ferry	1	1	2	2	1	1	<1	<1
Used to Travel Between Communities								
Personal vehicle	21	17	14	16	38	32	7	6
Air	19	16	11	18	17	8	24	20
Rental vehicle	18	14	26	17	11	5	22	19
State ferry	2	1	6	4	2	1	1	1
Motorcoach/bus	1	1	8	6	<1	-	1	1
Train	1	1	5	7	-	<1	<1	<1
Personal RV	1	<1	1	<1	1	<1	1	-
Rental RV	<1	<1	<1	<1	-	-	1	<1
Don't know/refused	1	1	2	1	<1	1	1	1

¹ Visitors exiting Alaska by highway were not surveyed in 2011-12.

Length of Stay, Destinations, and Lodging

Length of Stay

Visitors reported an average length of stay in Alaska of 10.5 nights. (This compares to 9.2 nights among summer visitors.) VFRs reported the longest average stay at 12.1 nights, followed by business travelers at 9.9 nights, and vacation/pleasure travelers at 8.9 nights. The average of 10.5 nights is slightly above the average length of stay among summer visitors (9.1 nights).

Fall/winter visitors reported longer stays than in 2006-07, with the average increasing from 8.8 to 10.5 nights. The increase was more exaggerated among vacation/pleasure visitors (from 5.6 to 8.9 nights) but was also reported by VFRs (from 10.4 to 12.1 nights) and business travelers (from 8.2 to 9.9 nights).

CHART 4.3 – Average Length of Stay in Alaska, By Trip Purpose, 2006-07 and 2011-12 (# of nights)

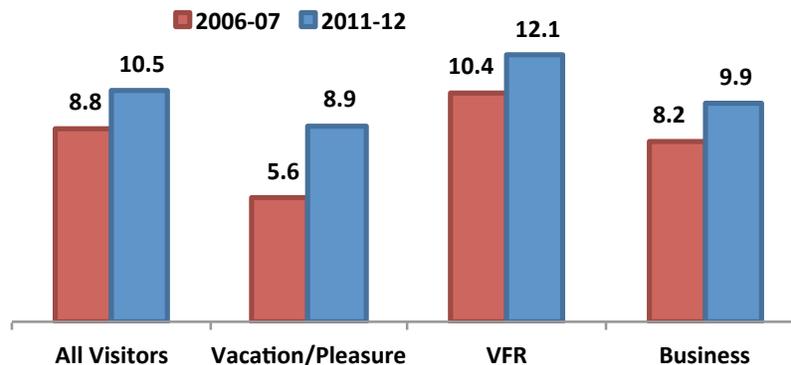


TABLE 4.7 - Length of Stay in Alaska, By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Three nights or less	24	25	29	17	11	11	34	37
Four to seven nights	45	37	51	47	49	41	41	33
Eight to 14 nights	17	21	17	24	23	30	12	14
15 to 21 nights	6	7	1	7	8	8	5	6
22 or more nights	7	10	2	6	9	10	8	11
Average number of nights	8.8	10.5	5.6	8.9	10.4	12.1	8.2	9.9

Lodging

Fall/winter visitors were most likely to stay in hotels/motels (56 percent) followed by private homes (41 percent). Very few stayed in lodges (3 percent), B&B's (2 percent), campgrounds (1 percent), or went camping (1 percent).

Lodging rates were fairly similar between 2006-07 and 2011-12. Those staying in private homes dropped slightly (from 44 to 41 percent), reflecting a similar drop in the VFR rate. Vacation/pleasure visitors reported a decrease in hotel/motel usage, and an increase in private home usage.

TABLE 4.8 - Lodging Types Used, By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Hotel/motel	57	56	77	65	23	20	84	79
Private home	44	41	23	30	84	84	14	14
Lodge	3	3	13	15	2	2	2	2
B&B	2	2	4	5	1	2	3	2
Wilderness camping	1	1	2	7	1	1	1	1
Campground/RV	1	1	<1	3	1	<1	-	<1
Other ¹	9	9	11	6	3	3	14	15

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

Destinations

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

Southcentral was the primary destination in the fall/winter market, drawing 77 percent of all visitors. The second most-visited region was Interior at 21 percent, followed by Southeast at 10 percent, Far North at 6 percent, and Southwest at 5 percent.

Anchorage was by far the most-visited community among fall/winter visitors, drawing 73 percent of the market. Other destinations were visited by fewer than 20 percent of visitors: Fairbanks (19 percent), Kenai Peninsula (13 percent), Palmer/Wasilla (12 percent), and Girdwood/Alyeska (10 percent). All other communities received fewer than 10 percent of fall/winter visitors.

While Anchorage and Southcentral were the primary destinations of all three trip purpose groups, vacation/pleasure visitors were much more likely to also visit the Interior and Fairbanks.

Visitation rates by region and community were generally similar to those of 2006-07. Most changes among the overall market were within the margin of error with the exception of the Interior, where visitation dropped from 28 to 21 percent, due to fewer business travelers and VFRs.

Profiles of visitors to individual communities are provided in the Summary Profiles section.

CHART 4.4 – Regions and Most Popular Communities Visited

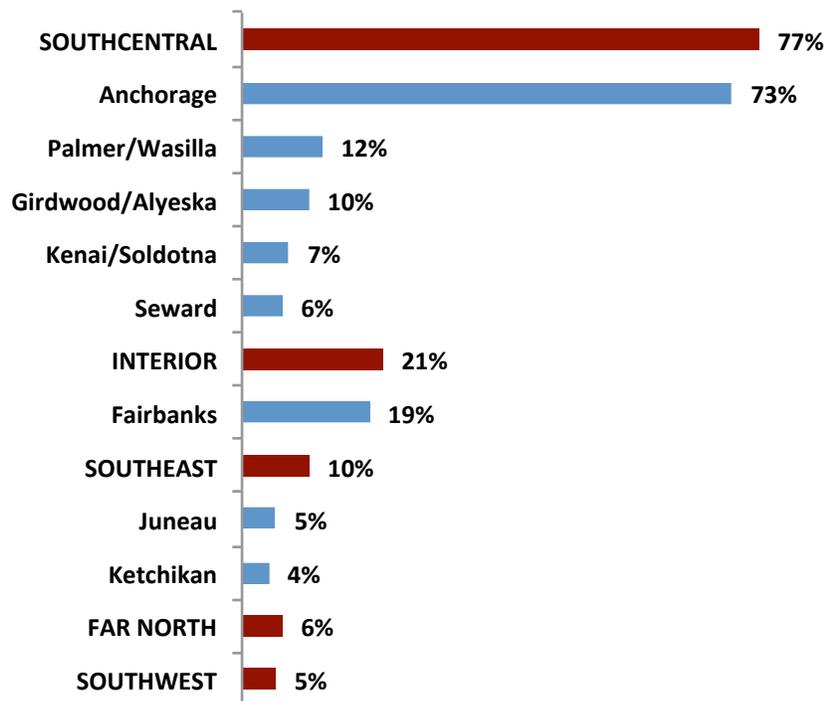


TABLE 4.9 - Destinations Visited (Day or Overnight), By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Southcentral	76	77	62	69	75	77	81	78
Anchorage	72	73	59	63	70	71	78	76
Kenai Peninsula	14	13	22	12	15	14	11	12
Kenai/Soldotna	7	7	8	5	8	9	7	6
Seward	7	6	16	6	8	5	5	6
Homer	3	3	6	2	5	4	1	3
Other Kenai Peninsula	2	1	3	4	2	1	1	<1
Palmer/Wasilla	14	12	18	10	19	18	9	9
Girdwood/Alyeska	11	10	20	13	12	14	8	7
Portage	5	3	13	4	5	4	2	3
Talkeetna	2	3	5	4	2	4	1	2
Whittier	2	2	5	5	3	1	1	1
Valdez	1	1	3	2	1	1	1	1
Prince William Sound	1	<1	2	1	-	<1	1	<1
Other Southcentral	3	3	13	6	1	4	2	1
Interior	28	21	41	41	23	15	29	19
Fairbanks	22	19	29	35	18	14	25	18
Denali	4	1	7	7	4	1	2	1
Glennallen	1	1	4	3	1	<1	1	1
Tok	1	1	3	2	1	<1	<1	1
Other Interior	5	3	9	6	3	1	5	3
Southeast	12	10	19	11	9	11	12	10
Juneau	6	5	5	7	4	5	9	5
Ketchikan	4	4	5	2	4	4	4	4
Sitka	2	2	2	3	2	2	2	1
Haines	1	1	5	3	1	<1	1	<1
Prince of Wales Island	1	1	2	1	1	1	1	1
Skagway	1	<1	6	2	<1	<1	1	<1
Wrangell	1	<1	<1	<1	1	<1	1	<1
Petersburg	<1	<1	<1	<1	<1	<1	1	<1
Glacier Bay/Gustavus	<1	<1	-	-	<1	-	1	1
Hoonah/Icy Strait Point	<1	<1	<1	<1	<1	<1	<1	<1
Other Southeast	1	<1	2	1	1	1	<1	<1
Far North	5	6	2	4	3	2	7	8
Nome	1	2	-	3	2	1	<1	2
Other Far North	4	4	2	1	1	1	7	7
Southwest	7	5	4	9	5	3	9	5
Kodiak	3	3	4	9	3	2	2	2
Other Southwest	4	2	<1	<1	2	1	7	3

TABLE 4.10 - Overnight Destinations, By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Southcentral	74	73	63	65	72	74	78	75
Anchorage	65	63	51	53	59	58	75	69
Kenai Peninsula	7	8	10	8	8	9	6	7
Kenai/Soldotna	3	5	3	2	4	6	2	4
Seward	1	2	2	4	<1	1	2	1
Homer	3	1	5	1	4	1	1	2
Other Kenai Peninsula	1	1	2	2	2	1	1	-
Palmer/Wasilla	6	6	2	4	12	11	2	2
Girdwood/Alyeska	3	2	11	8	2	2	1	1
Talkeetna	1	1	2	3	<1	1	1	<1
Valdez	1	1	3	2	1	<1	1	1
Whittier	-	<1	-	-	-	<1	-	-
Prince William Sound	<1	-	-	-	-	-	<1	-
Other Southcentral	1	2	5	5	1	3	<1	1
Interior	24	20	36	40	21	15	23	18
Fairbanks	21	18	30	35	17	14	22	16
Glennallen	1	1	2	2	1	<1	1	1
Denali	1	1	2	3	2	<1	<1	<1
Tok	1	1	2	1	1	<1	<1	1
Other Interior	3	2	6	3	1	<1	3	3
Southeast	10	10	16	10	9	10	11	9
Juneau	5	4	5	5	4	5	7	4
Ketchikan	3	3	4	2	3	3	3	3
Sitka	2	2	2	2	1	2	2	1
Prince of Wales Island	1	1	2	1	1	1	1	1
Haines	1	1	3	2	1	<1	1	<1
Petersburg	<1	<1	-	<1	<1	<1	1	1
Skagway	1	<1	2	1	-	<1	1	<1
Wrangell	<1	<1	-	<1	<1	<1	1	<1
Hoonah/Icy Strait Point	<1	<1	-	<1	<1	<1	<1	<1
Glacier Bay/Gustavus	<1	<1	-	-	-	-	<1	<1
Other Southeast	1	<1	1	1	1	<1	<1	<1
Far North	4	5	1	3	2	2	6	8
Nome	1	2	-	3	2	1	<1	2
Other Far North	3	3	1	<1	1	1	6	6
Southwest	7	5	5	9	5	3	9	5
Kodiak	2	3	5	9	2	2	2	2
Other Southwest	4	2	-	<1	2	1	7	2

**TABLE 4.11 - Average Number of Nights, By Trip Purpose
2006-07 and 2011-12**

Base: Those who overnighted in each destination

	Overnight Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Southcentral	7.0	8.5	5.3	8.0	9.1	11.3	5.6	6.8
Anchorage	6.2	7.1	3.9	6.5	8.2	9.8	5.1	5.6
Palmer/Wasilla	6.2	8.6	3.9	*	8.2	*	5.1	*
Kenai Peninsula	6.0	10.0	*	*	*	*	*	*
Interior	7.1	9.1	5.5	5.3	8.2	11.6	6.8	9.9
Fairbanks	6.0	8.3	5.5	5.4	7.5	11.7	5.2	7.7
Southeast	10.1	8.1	8.3	8.1	13.1	10.9	8.5	6.0
Juneau	5.9	5.1	*	*	7.6	8.6	5.1	3.1
Ketchikan	5.9	6.2	*	*	7.7	8.8	3.8	4.9
Sitka	11.0	8.5	*	*	*	*	*	*
Far North	*	14.4		*	*	*		*
Southwest	12.7	13.7	*	*	*	*	*	*

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

The most popular activity among fall/winter visitors was shopping at 55 percent followed by business at 51 percent and visiting friends/relatives at 47 percent. Participation rates drop off sharply after these three primary activities, with 23 percent participating in wildlife viewing, 17 percent participating in cultural activities, and 15 percent participating in hiking/nature walks. Rates varied widely by market, with nearly all VFRs reporting visiting friends/relatives, and nearly all business travelers reporting business activities. Business visitors tended to participate in the least amount of activities.

Typical winter-time activities included Northern Lights viewing at 8 percent, dogsledding at 4 percent, snowmobiling at 4 percent, snow skiing/boarding at 4 percent, and Chena Hot Springs at 3 percent. Not surprisingly, vacation/pleasure visitors participated in all of these activities at much higher rates when compared to VFRs and business travelers.

Compared to 2006-07, participation rates in 2011-12 showed a few differences. Rates for shopping and business increased (from 48 to 55 percent, and from 44 to 51 percent, respectively), as did rates for wildlife viewing (19 to 23 percent), cultural activities (14 to 17 percent), and hiking/nature walk (10 to 15 percent).

CHART 4.5 – Most Popular Fall/Winter Activities

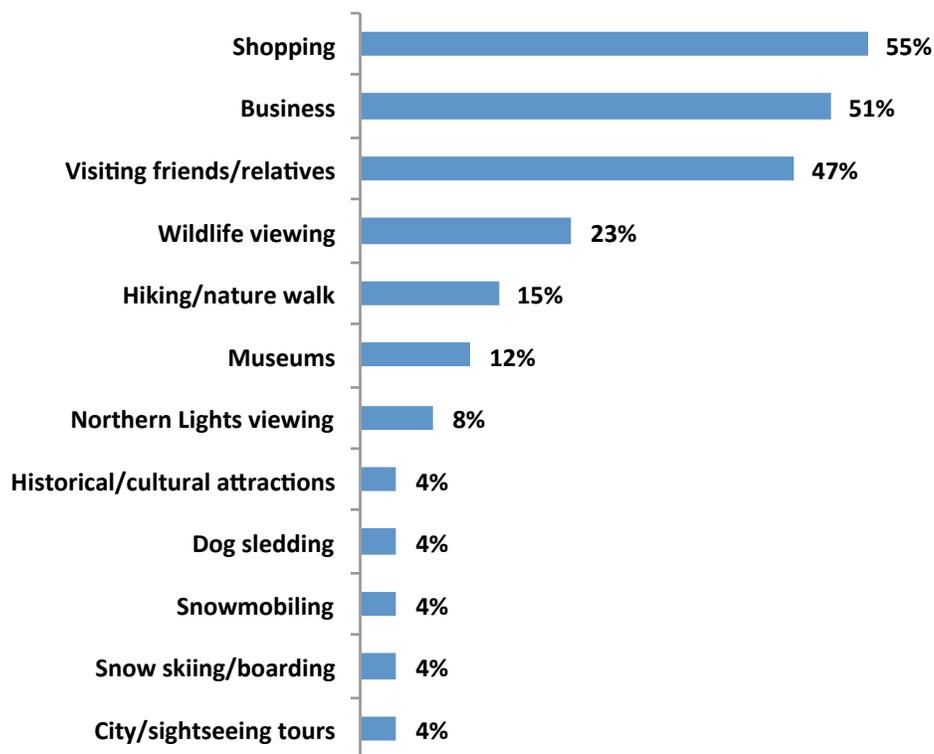


TABLE 4.12 - Activity Participation, By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Shopping	48	55	68	72	54	70	37	40
Business	44	51	1	<1	1	1	95	98
Visiting friend/relatives	49	47	22	32	96	98	13	15
Wildlife viewing	19	23	27	36	22	26	15	18
Birdwatching	4	3	9	4	6	5	2	2
Cultural activities	14	17	34	45	12	18	10	8
Museums	9	12	23	39	8	12	6	6
Historical/cultural attractions	6	4	12	10	5	5	5	2
Native cultural tours/ activities	3	3	4	3	3	5	3	3
Gold panning/mine tour	<1	<1	<1	1	<1	<1	1	<1
Hiking/nature walk	10	15	15	20	13	18	7	11
Northern Lights viewing	7	8	19	33	7	6	4	3
Dog sledding	4	4	13	22	3	2	3	1
Snowmobiling	4	4	7	7	5	6	1	3
Snow skiing/boarding	5	4	9	10	6	5	3	2
City/sightseeing tours	6	4	13	13	6	3	4	2
Fishing	3	3	4	10	4	3	1	2
Unguided fishing	3	2	3	6	4	2	1	1
Guided fishing	<1	1	1	4	<1	1	<1	1
Chena Hot Springs	n/a	3	n/a	17	n/a	2	n/a	1
Shows/Alaska entertainment	1	3	1	4	2	4	1	1
Hunting	1	2	5	10	2	1	<1	1
ATV/4-wheeling	n/a	2	n/a	2	n/a	3	n/a	2
Day cruises	2	2	4	5	2	1	1	1
Flightseeing	2	2	6	4	2	2	2	1
Camping	1	1	4	4	1	2	1	1
Tramway/gondola	2	1	7	1	1	1	1	1
Alaska Railroad	1	1	4	5	-	<1	<1	<1
Biking	<1	1	<1	1	1	1	<1	1
Kayaking/canoeing	n/a	<1	n/a	<1	n/a	<1	n/a	<1
Zip-line	n/a	<1	n/a	-	n/a	-	n/a	<1
Other	2	9	4	29	4	8	<1	5

Satisfaction Ratings

Compared to Expectations

When asked how well their Alaska trip had lived up to their expectations, half of visitors (49 percent) said it was either higher or much higher than expectations. The same percentage said it was about what they expected. Only 2 percent said the trip was below expectations. Vacation/pleasure visitors gave the highest compared-to-expectation ratings, followed by business visitors, then VFRs. Ratings rose slightly from 2006-07, when 44 percent said the trip was higher than their expectations.

Summer visitors tend to give higher trip ratings than fall/winter visitors; 63 percent of summer visitors said their trip had exceeded their expectations.

**TABLE 4.13 - Alaska Trip Compared to Expectations
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
5 - Much higher than expectations	17	21	24	32	14	16	21	26
4 - Higher than expectations	27	28	30	32	25	28	38	24
3 - About what you expected	54	49	41	34	59	55	40	47
2 - Below expectations	2	2	5	3	2	1	2	2
1 - Far below expectations	-	<1	-	-	-	<1	-	-
Average 1-5	3.6	3.7	3.7	3.9	3.5	3.6	3.8	3.7

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

Value for the Money

Fall/winter visitors most often felt that the value for the money on their Alaska vacation was about the same compared to other vacation destinations (46 percent). One-third (34 percent) felt that the value was better or much better, while 20 percent felt that the value was worse or much worse. Value for the money ratings fell slightly from 2006-07: those rating the value worse or much worse increased from 13 to 20 percent, including from 8 to 18 percent among vacation/pleasure visitors, from 14 to 18 percent among VFRs, and from 11 to 26 percent among business travelers.

TABLE 4.14 - Value for the Money
Compared with other vacation destinations visited in the past five years
By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
5 - Much better	15	13	16	11	16	12	13	19
4 - Better	21	21	23	26	19	20	32	19
3 - About the same	51	46	53	44	51	49	44	36
2 - Worse	12	18	8	16	13	16	11	26
1 - Much worse	1	2	-	2	1	2	<1	-
Average 1-5	3.4	3.3	3.5	3.3	3.3	3.2	3.5	3.3

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

Satisfaction with Overall Experience

Six out of ten fall/winter visitors were very satisfied with their overall Alaska experience, while another 38 percent were satisfied. Less than 1 percent were dissatisfied. Vacation/pleasure visitors gave slightly higher ratings at 69 percent very satisfied, compared to 64 percent among VFRs and 56 percent among business travelers. Ratings were generally similar compared to 2006-07: those very satisfied went from 58 to 61 percent, while those satisfied went from 40 to 38 percent. Vacation/pleasure visitors who were very satisfied increased from 60 to 69 percent.

CHART 4.6 – Satisfaction with Overall Alaska Experience

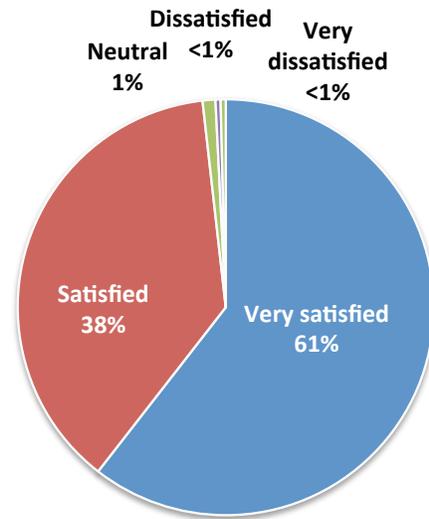


TABLE 4.15 - Satisfaction with Overall Alaska Experience By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
5 - Very satisfied	58	61	60	69	60	64	55	56
4 - Satisfied	40	38	37	28	39	34	41	43
3 - Neither/neutral	2	1	2	2	1	1	2	1
2 - Dissatisfied	1	<1	1	<1	<1	<1	1	<1
1 - Very dissatisfied	-	<1	-	-	-	-	-	<1
Average 1-5	4.5	4.6	4.6	4.7	4.6	4.6	4.5	4.5

Satisfaction by Category

Visitors were asked about their satisfaction with a wide array of categories, shown in the table below (“very satisfied” ratings only).

Categories with the highest number of very satisfied ratings include: friendliness of residents (66 percent), sightseeing (60 percent), and tours/activities (58 percent). Categories receiving fewer “very satisfied” ratings include shopping (32 percent), value for the money (32 percent), and transportation within Alaska (31 percent).

Dissatisfaction was generally very low, accounting for fewer than 4 percent of responses for most categories. Value for the money received 8 percent dissatisfied ratings.

Satisfaction rates increased in two categories: from 45 to 58 percent for tours and activities; from 40 to 48 percent for visitor information services. There were two slight decreases: from 55 to 50 percent for accommodations and from 36 to 31 percent for transportation within Alaska. Other changes fell within the margin of error.

**TABLE 4.16 - Satisfaction Ratings by Category: % “Very Satisfied”
By Trip Purpose, 2006-2007 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Friendliness of residents	67	66	67	74	65	67	70	64
Sightseeing	56	60	55	61	56	61	55	58
Tours and activities	45	58	55	63	43	56	41	58
Accommodations	55	50	52	52	66	59	46	43
Wildlife viewing	47	50	46	54	47	53	48	45
Visitor information services	40	48	52	50	37	43	38	52
Restaurants	44	42	42	41	42	46	45	39
Shopping	33	32	32	34	36	34	29	29
Value for the money	33	32	33	37	39	34	28	28
Transportation within Alaska	36	31	38	38	34	34	36	28

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

**TABLE 4.17 - Satisfaction Ratings by Category
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Accommodations								
5 - Very satisfied	55	50	52	52	66	59	46	43
4 - Satisfied	38	46	39	41	30	38	44	52
3 - Neither/neutral	6	4	7	5	3	3	8	4
2 - Dissatisfied	1	1	2	2	1	-	1	1
1 - Very dissatisfied	<1	<1	-	-	<1	<1	<1	-
Average 1-5	4.5	4.4	4.4	4.4	4.6	4.6	4.3	4.4
Restaurants								
5 - Very satisfied	44	42	42	41	42	46	45	39
4 - Satisfied	46	50	44	44	45	48	46	53
3 - Neither/neutral	7	6	12	12	7	4	7	5
2 - Dissatisfied	3	2	2	2	5	2	2	2
1 - Very dissatisfied	<1	<1	-	<1	1	<1	-	1
Average 1-5	4.3	4.3	4.3	4.2	4.2	4.4	4.3	4.3
Shopping								
5 - Very satisfied	33	32	32	34	36	34	29	29
4 - Satisfied	48	55	40	45	52	55	45	60
3 - Neither/neutral	16	9	25	16	8	8	23	8
2 - Dissatisfied	3	3	4	4	3	3	2	2
1 - Very dissatisfied	<1	<1	-	1	1	-	<1	1
Average 1-5	4.1	4.2	4.0	4.1	4.2	4.2	4.0	4.1
Visitor information services								
5 - Very satisfied	40	48	52	50	37	43	38	52
4 - Satisfied	36	43	33	31	24	52	47	43
3 - Neither/neutral	21	7	14	15	33	6	14	2
2 - Dissatisfied	3	2	1	3	6	-	<1	2
1 - Very dissatisfied	<1	<1	<1	<1	-	-	1	-
Average 1-5	4.1	4.4	4.3	4.3	3.9	4.4	4.2	4.5
Sightseeing								
5 - Very satisfied	56	60	55	61	56	61	55	58
4 - Satisfied	36	36	35	30	37	37	36	39
3 - Neither/neutral	7	3	10	6	4	2	9	3
2 - Dissatisfied	1	1	<1	2	3	-	-	-
1 - Very dissatisfied	-	<1	-	<1	-	-	-	-
Average 1-5	4.5	4.6	4.4	4.5	4.5	4.6	4.5	4.5

**TABLE 4.17 - Satisfaction Ratings by Category (cont'd)
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Tours and activities								
5 - Very satisfied	45	58	55	63	43	56	41	58
4 - Satisfied	35	37	32	32	35	40	39	38
3 - Neither/neutral	16	4	9	4	19	4	17	4
2 - Dissatisfied	3	<1	4	<1	4	<1	3	<1
1 - Very dissatisfied	-	<1	-	<1	-	-	-	-
Average 1-5	4.2	4.5	4.4	4.6	4.2	4.5	4.2	4.5
Wildlife viewing								
5 - Very satisfied	47	50	46	54	47	53	48	45
4 - Satisfied	34	41	36	38	35	37	31	45
3 - Neither/neutral	14	7	14	5	11	8	17	7
2 - Dissatisfied	4	2	3	3	6	2	4	1
1 - Very dissatisfied	<1	<1	<1	<1	<1	-	-	1
Average 1-5	4.2	4.4	4.2	4.4	4.2	4.4	4.2	4.3
Transportation within Alaska								
5 - Very satisfied	36	31	38	38	34	34	36	28
4 - Satisfied	49	59	52	51	51	57	47	62
3 - Neither/neutral	12	6	10	7	11	6	13	6
2 - Dissatisfied	2	3	1	3	2	2	3	4
1 - Very dissatisfied	1	<1	-	<1	1	1	1	<1
Average 1-5	4.2	4.2	4.3	4.2	4.2	4.2	4.1	4.1
Friendliness of residents								
5 - Very satisfied	67	66	67	74	65	67	70	64
4 - Satisfied	28	31	29	22	32	31	23	34
3 - Neither/neutral	4	2	3	3	3	2	5	1
2 - Dissatisfied	1	1	<1	1	1	1	1	1
1 - Very dissatisfied	-	<1	-	-	-	<1	-	<1
Average 1-5	4.6	4.6	4.6	4.7	4.6	4.6	4.6	4.6
Value for the money								
5 - Very satisfied	33	32	33	37	39	34	28	28
4 - Satisfied	44	47	41	46	39	46	49	47
3 - Neither/neutral	17	14	17	10	18	12	17	16
2 - Dissatisfied	5	7	4	8	5	6	5	8
1 - Very dissatisfied	1	1	-	-	<1	1	1	1
Average 1-5	4.0	4.0	4.1	4.1	4.1	4.1	4.0	4.0

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

Recommending Alaska

Seven out of ten fall/winter visitors said they were very likely to recommend Alaska as a vacation destination to their friends and family, while another 25 percent were likely. Two percent said they were unlikely to do so. Likelihood rates were generally similar to those of 2006-07.

**TABLE 4.18 - Likelihood of Recommending Alaska to Friends/Family
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Very likely	73	70	71	74	77	70	69	69
Likely	20	25	27	25	17	26	22	25
Unlikely	1	2	<1	1	2	2	2	3
Very unlikely	<1	<1	<1	-	1	<1	<1	<1
Don't know	5	2	1	<1	4	1	7	2

Returning to Alaska

Three-quarters of fall/winter visitors said they were very likely to return to Alaska in the next five years. Vacation/pleasure visitors were less likely (54 percent very likely) compared to VFRs (77 percent) and business travelers (81 percent). Likelihood of returning was essentially the same as in 2006-07 (79 percent very likely).

**TABLE 4.19 - Likelihood of Returning to Alaska in Next Five Years
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Very likely	79	76	62	54	82	77	80	81
Likely	14	17	21	30	11	16	15	14
Unlikely	2	3	7	6	3	4	1	3
Very unlikely	1	1	3	3	1	1	1	1
Don't know	4	2	7	6	4	2	4	1

Previous Alaska Travel

Three-quarters of fall/winter visitors were repeat visitors to the state. That figure is highest among VFRs at 80 percent, followed by business travelers at 76 percent, then vacation/pleasure visitors at 49 percent. Repeat rates were essentially the same as in 2006-07.

**TABLE 4.20 - Repeat Alaska Travel
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
First trip to Alaska	25	26	48	51	18	20	26	24
Been to Alaska before	75	74	52	49	82	80	74	76

Repeat travelers reported an average number of 4.4 previous Alaska vacation trips, ranging from 2.2 trips among business travelers to 7.7 trips among VFRs. (Those who reported zero previous vacation trips had been to Alaska before, but for business rather than vacation.) The average number of previous trips fell from 6.1 in 2006-07 to 4.4 in 2011-12, mostly attributable to the drop among business travelers from 4.1 to 2.2.

**TABLE 4.21 - Number of Previous Vacation Trips
By Trip Purpose, 2006-07 and 2011-12 (%)
Base: Repeat Visitors**

	Repeat Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
None ¹	7	26	-	2	7	3	16	46
One	26	18	32	31	20	15	32	19
Two	14	9	15	12	13	10	15	7
Three to five	22	15	25	26	25	21	17	9
Six to ten	16	6	13	3	22	11	10	3
Eleven or more	15	9	15	10	19	16	9	4
Average number of trips	6.1	4.4	5.7	5.3	7.7	7.7	4.1	2.2

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

Nearly all repeat visitors had traveled to and from Alaska via air on their last trip, with small percentages having traveled by cruise ship (3 percent), highway (2 percent), and ferry (1 percent). The exclusion of highway travelers from the 2011-12 sample resulted in the large drop in the percentage of vacation/pleasure visitors who had previously traveled by highway. It is unclear whether previous travel by highway actually dropped.

**TABLE 4.22 - Entry/Exit Modes Used on Previous Trip
By Trip Purpose, 2006-07 and 2011-12 (%)**
Base: Repeat Visitors

	Repeat Visitors		Vacation/Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Air	92	96	72	92	93	95	95	97
Cruise ship	4	3	11	10	4	2	3	2
Highway	4	2	20	1	3	3	2	2
State ferry	1	1	2	2	1	2	1	<1

Trip Planning Timeline

Fall/winter visitors decided to come on their trip an average of 2.9 months ahead of time, and booked their major travel arrangements an average of 1.7 months ahead of time. The average lead time for trip decision increased slightly, from 2.6 to 2.9 months, between 2006-07 and 2011-12. The average lead time for booking remained essentially the same (from 1.6 to 1.7 months).

Business travelers showed the shortest average lead times for both trip decision (2.1 months) and booking (1.2 months). Vacation/pleasure travelers showed longer lead times for trip decision (5.6 months) and booking (3.3 months). The increase in lead times was more exaggerated among vacation/pleasure visitors.

**TABLE 4.23 - Trip Planning Timeline
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
How far in advance did you decide to come on this trip to Alaska?								
Less than one month	37	39	19	14	31	33	47	49
One to three months	41	39	39	43	45	41	37	37
Four to six months	14	12	26	19	15	16	9	8
Seven to 11 months	2	3	3	8	2	4	3	2
One year or more	6	7	12	15	7	6	3	5
Don't know	n/a	<1	n/a	1	n/a	<1	n/a	<1
Average # of months	2.6	2.9	4.1	5.6	2.8	3.1	2.1	2.1
How far in advance did you book your major travel arrangements?								
Less than one month	48	47	29	20	41	39	60	60
One to three months	41	40	43	51	47	46	36	34
Four to six months	8	9	18	20	10	11	3	5
Seven to 11 months	1	2	5	5	<1	2	<1	1
One year or more	1	1	3	4	1	1	-	1
Don't know	n/a	1	n/a	1	n/a	1	n/a	1
Average # of months	1.6	1.7	2.8	3.3	1.8	1.9	1.0	1.2

Note: Don't know/refused responses were removed from the base in 2006.

The following table shows trip decision and booking timelines based on the calendar month/year. The timeline was determined by applying the number of months given by respondents to the month in which they participated in the survey. Results from 2006-07 are not shown because the data was not analyzed by calendar month/year.

Fall/winter travelers tended to make their trip decision in one of two time periods: August-October 2011 and November 2011-January 2012. These two periods accounted for 32 and 31 percent, respectively, of visitors. One-fifth made their decision between February and April of 2012. Results for trip booking time periods were similar.

**TABLE 4.24 - Trip Planning Timeline by Calendar Month
By Trip Purpose (%)**

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business Bus./Pleasure
How far in advance did you decide to come on this trip to Alaska?				
Before Jan 2011	6	14	6	3
Feb-Apr 2011	4	7	4	3
May-Jul 2011	7	12	9	5
Aug-Oct 2011	32	32	37	28
Nov 2011-Jan 2012	31	21	29	34
Feb-Apr 2012	21	14	15	27
How far in advance did you book your major travel arrangements?				
Before Jan 2011	1	5	1	-
Feb-Apr 2011	2	6	2	1
May-Jul 2011	5	8	7	3
Aug-Oct 2011	33	36	40	27
Nov 2011-Jan 2012	35	29	32	39
Feb-Apr 2012	24	17	18	29

Internet Usage

Four out of five fall/winter visitors used the internet to plan their trip, including 74 percent who booked at least one portion online. Business travelers were slightly less likely to use the internet to plan their trip. Internet usage has increased substantially since 2006-07: from 67 to 80 percent for overall internet usage, and from 57 to 74 percent for online booking. Summer visitors showed similar increases.

CHART 4.7 – Internet Usage, 2006-07 and 2011-12

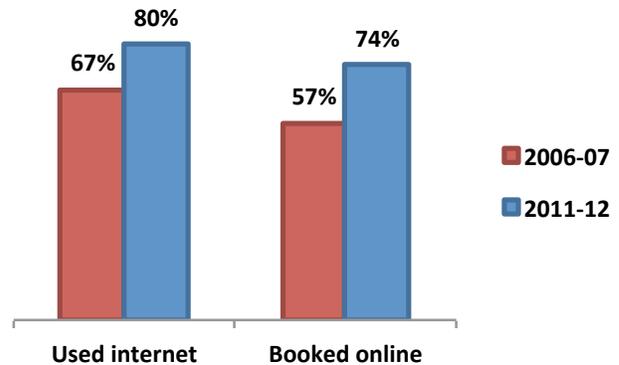


TABLE 4.25 - Internet Usage By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Used Internet	67	80	64	86	77	86	59	74
Research only	10	6	16	14	8	4	11	5
Research and book	57	74	48	72	69	82	48	69
Did not use Internet	31	17	35	14	22	11	39	23
Don't know	2	3	1	<1	1	3	2	3

The most popular trip component booked online was airfare, at 71 percent of all fall/winter visitors. Over one-quarter booked lodging online; and 16 percent booked vehicle rental. Tours and ferry were booked by only a fraction (2 and 1 percent, respectively). VFRs were the most likely to book airfare online, while business travelers were more likely to book lodging and vehicle rental online.

TABLE 4.26 - Trip Components Booked over Internet By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Airfare	54	71	39	67	66	80	46	66
Lodging	17	28	23	29	8	10	25	40
Vehicle rental	10	16	11	15	6	5	14	25
Tours	1	2	7	10	1	1	<1	<1
Ferry	1	1	3	1	1	1	<1	1

Travel Agent Usage

Seventeen percent of fall/winter travelers used a travel agent to book at least a portion of their trip, including 23 percent of business travelers, 20 percent of vacation/pleasure visitors, and 7 percent of VFRs. Travel agent use was down from 2006-07 (from 21 to 17 percent).

Airfare and lodging were the most common trip components booked through a travel agent. Business travelers were more likely to book lodging and vehicle rental, while vacation/pleasure visitors were more likely to book packages.

**TABLE 4.27 - Travel Agent Usage
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Booked through travel agent	21	17	33	20	10	7	28	23
Did not book through travel agent	76	80	65	80	88	90	68	73
Don't know	3	3	2	<1	3	3	4	4

**TABLE 4.28 - Trip Components Booked through a Travel Agent
By Trip Purpose, 2011-12 (%)**

	All Visitors	Vacation/ Pleasure	Business Bus./Pleasure
Airfare	16	16	22
Lodging	10	5	18
Vehicle rental	5	<1	10
Overnight packages	2	13	<1
Tours	1	7	<1
Ferry	<1	-	<1
Other	<1	<1	<1

Note: This question was not asked in the 2006 survey. Sample size among VFRs too small for analysis.

Usage of State of Alaska Information Sources

Nine percent of fall/winter travelers visited the official State of Alaska travel website (travelalaska.com), including 19 percent of vacation/pleasure visitors, 9 percent of VFRs, and 7 percent of business travelers. Just 4 percent received the Official State Vacation Planner, including 10 percent of vacation/pleasure visitors, and 3 percent of both VFRs and business travelers. Usage rates for both travelalaska.com and the Official State Vacation Planner were similar to 2006-07.

**TABLE 4.29 - Usage of State of Alaska Information Sources
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Did you visit the official State of Alaska travel website? (www.travelalaska.com)								
Yes	8	9	15	19	9	9	4	7
No	87	88	77	78	86	88	91	91
Don't know	4	2	7	3	4	3	2	2
Did you receive the Official Alaska State Vacation Planner?								
Yes	3	4	9	10	4	3	1	3
No	94	94	88	88	94	95	97	95
Don't know	2	2	3	2	2	2	2	1

Usage of Additional Information Sources

After visitors were asked about their usage of the internet, travel agents, and State of Alaska sources, they were shown a list of additional sources and asked to identify which they had used in planning their Alaska trip. Fall/winter visitors tended to mention very few sources other than prior experience (62 percent) and friends/family (57 percent). Vacation/pleasure visitors tended to do more research than other visitors, with higher usage of brochures, television, and travel guides/books.

Compared to 2006-07, source usage did not change dramatically, although the percentage mentioning friends/family increased 47 to 57 percent (reflecting an increase from 34 to 50 percent among vacation/pleasure visitors and from 17 to 45 percent among business travelers). The option of “cell phone app” was introduced in 2011-12, and was used by 6 percent of respondents.

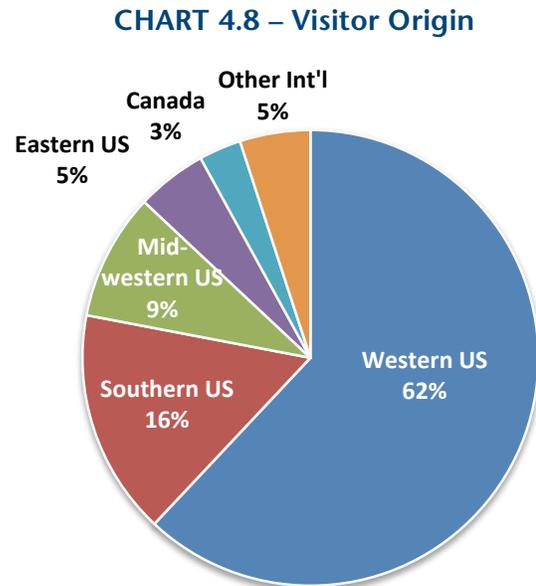
**TABLE 4.30 - Other Information Sources
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Prior experience	64	62	41	41	73	70	62	62
Friends/family	47	57	34	50	83	76	17	45
Brochures (net)	7	10	11	17	5	6	8	10
Community brochures	2	1	2	2	1	1	3	1
Ferry brochure/schedule	2	1	4	1	3	1	<1	<1
Cell phone apps	*	6	*	4	*	5	*	7
Hotel/lodge	3	6	8	9	2	2	3	7
Television	5	5	7	13	4	3	5	4
Magazine	4	4	10	6	4	5	3	4
Travel guide/book	5	3	14	12	3	3	3	1
AAA	3	3	5	3	2	3	4	3
Newspaper	3	3	3	6	2	3	2	2
Milepost	4	1	1	2	5	2	4	<1
Club/organization	3	1	6	-	1	-	4	2
Convention & Visitors Bureau(s)	2	1	7	1	2	1	2	1
Library	1	1	2	3	1	1	1	<1
North to Alaska guide	<1	1	-	<1	1	1	-	<1
Cruise line/tour company	2	<1	3	-	1	-	2	<1
Travel/recreation exhibits	<1	<1	1	1	<1	-	-	<1
Other	1	2	1	4	1	1	1	2
None	14	10	19	12	4	4	22	14
Don't know	1	<1	1	-	<1	-	1	<1

*Was not given as an option in AVSP V.

Origin

Over half of fall/winter visitors (62 percent) came from Western US states, most commonly Washington (25 percent), California (13 percent), and Oregon (7 percent). Sixteen percent came from the South, 9 percent from the Midwest, and 5 percent from the East. Canada accounted for 3 percent of visitors, while other international countries accounted for 5 percent. VFRs and business travelers were much more likely to be from the West compared to vacation/pleasure visitors. Vacation/pleasure visitors were much more likely to be from international countries (other than Canada) compared to VFRs and business travelers.



The percentage of fall/winter visitors from the West increased slightly, from 57 to 62 percent, between 2006-07 and 2011-12, with increases in both the VFR and business travel markets. Other changes in the overall market were negligible. The decrease in Canadian vacation/pleasure visitors from 13 to 1 percent is due to the exclusion of highway visitors from the 2011-12 sample; it is unknown whether the Canadian vacation/pleasure market actually dropped between the two time periods.

The fall/winter international travel market is profiled separately in the following section of the report.

See table next page

TABLE 4.31 - Origin
By Trip Purpose, 2006-07 and 2011-12 (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
United States	92	92	71	74	95	95	95	95
Western US	57	62	35	36	59	64	60	66
Washington	23	25	11	10	24	21	24	31
California	11	13	12	10	11	15	10	11
Oregon	6	7	1	1	5	8	9	8
Arizona	3	3	2	3	4	4	3	3
Colorado	4	3	2	-	3	4	4	4
Idaho	3	3	2	3	4	2	2	4
Southern US	18	16	13	20	14	13	23	17
Texas	5	4	4	3	4	3	7	5
Florida	3	2	2	5	2	2	3	2
Midwestern US	10	9	17	11	11	12	7	7
Illinois	2	2	8	<1	2	3	1	1
Eastern US	6	5	5	6	8	6	5	4
New York	2	1	3	2	4	1	1	1
Pennsylvania	1	1	1	<1	2	1	<1	1
Canada	4	3	13	1	3	2	3	3
Other International	4	5	16	25	3	3	2	2
Asia	2	3	13	17	1	<1	1	<1
Europe	1	2	2	5	<1	1	1	1
Australia/New Zealand	<1	<1	1	1	1	<1	-	<1

Party Size

Visitors were asked two questions regarding the number of people with whom they were traveling. They were first asked for the number of people with whom they were sharing expenses, such as food, lodging, and transportation – the definition of party size used in previous AVSPs. The second question asked for the number of people traveling in the respondent’s group, including any friends or family they were traveling with (regardless of sharing expenses). Group size was asked in response to the growing trend of group travel, where several couples or an extended family (for example) may travel together without sharing expenses.

Fall/winter visitors reported an average party size of 1.4, ranging from 1.3 among business travelers, to 1.4 among VFRs, to 1.9 among vacation/pleasure visitors. The most common party size was one, accounting for 72 percent of all parties. Average party size adjusted slightly from 2006-07, from 1.5 to 1.4 people, due to a slight increase in solo travelers. This difference was more pronounced in the vacation/pleasure market.

The average group size was 2.2, ranging from 1.5 among VFRs, to 2.5 among business travelers, to 2.7 among vacation/pleasure visitors.

**TABLE 4.32 - Party Size
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
One	66	72	30	44	60	68	81	82
Two	25	22	43	40	32	27	15	13
Three	5	3	13	9	6	3	2	2
Four	2	1	9	2	2	1	1	2
Five or more	1	1	5	6	1	1	1	1
Average party size	1.5	1.4	2.2	1.9	1.5	1.4	1.3	1.3

**TABLE 4.33 - Group Size
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors	Vacation/ Pleasure	Visiting Friends/Rel.	Business Bus./Pleasure
One	63	28	64	72
Two	24	45	29	15
Three	4	12	3	4
Four	3	4	2	3
Five	1	4	1	<1
Six to ten	2	5	1	2
Eleven or more	2	2	-	4
Average group size	2.2	2.7	1.5	2.5

Note: This question was not asked in the 2006-07 survey.

Age and Gender

Overall, fall/winter visitors were slightly more likely to be male at 57 percent. Business travelers and vacation/pleasure travelers were more likely to be male at 70 and 61 percent respectively, while VFRs were more likely to be female at 62 percent. The average age reported was 48, ranging from 46 among business travelers to 49 among vacation/pleasure visitors and 50 among VFRs.

Among the overall market, gender was essentially unchanged between 2006-07 and 2011-12, although vacation/pleasure visitors became more likely to be male (from 52 to 61 percent). The average age increased from 45 to 48, with the percentage over 55 increasing from 29 to 41 percent.

**TABLE 4.34 - Age and Gender
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Gender								
Male	56	57	52	61	43	38	72	70
Female	44	43	48	39	57	62	28	30
Age								
Under 18	4	4	8	7	6	5	1	2
18 to 24	7	7	6	5	10	9	4	7
25 to 34	15	14	15	12	16	12	14	17
35 to 44	19	15	17	15	14	9	25	19
45 to 54	26	20	29	16	18	16	32	24
55 to 64	20	26	20	24	21	28	20	25
65 and older	9	15	6	21	15	22	3	7
Average age (years)	44.7	47.8	43.6	48.6	45.0	49.7	45.0	46.0

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

Household Characteristics

One-third of fall/winter visitors (32 percent) reported children living in their household. The number is highest among business visitors (41 percent), followed by vacation/pleasure visitors at 29 percent, and VFRs at 20 percent. Rates were essentially the same as in 2006-07.

**TABLE 4.35 - Children Living In Household
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Children living in household	33	32	28	29	26	20	40	41
No children in household	66	68	69	71	73	80	59	59
Don't know	1	<1	2	-	1	<1	<1	<1

Twenty-two percent of fall/winter visitors were retired or semi-retired, ranging from 10 percent among business travelers to 30 percent among vacation/pleasure visitors and 35 percent among VFRs. The retirement rate, at 22 percent, was similar to that of 2006-07 (20 percent).

**TABLE 4.36 - Retired or Semi-Retired
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Retired or semi-retired	20	22	21	30	30	35	10	10
Not retired	79	78	77	69	69	64	90	90
Don't know	1	1	2	1	1	1	<1	<1

About six in ten fall/winter visitors (58 percent) had graduated from college, including 21 percent who attained a higher degree. Business visitors showed higher levels of educational achievement. The college graduate rate of 58 percent was similar to that of 2006-07 (59 percent).

**TABLE 4.37 - Education
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Some high school	1	1	<1	1	1	2	<1	1
High school diploma/GED	11	12	15	13	15	18	6	8
Associate/technical degree	10	9	8	5	10	10	10	9
Some college	19	19	19	20	26	25	13	14
Graduated from college	35	37	38	31	31	30	38	43
Master's/Doctorate	24	21	19	28	16	16	32	24
Don't know	1	<1	1	1	1	<1	<1	<1

Fall/winter visitors reported an average household income of \$108,000, ranging from \$79,000 among VFRs to \$102,000 among vacation/pleasure visitors, to \$128,000 among business travelers. Average income was up slightly from 2006-07, from \$103,000 to \$108,000, in nominal terms. However, after adjusting for inflation, average income was down by 8 percent. (This decrease also occurred among summer visitors, whose inflation-adjusted average income dropped by 9 percent.)

**TABLE 4.38 - Household Income
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Less than \$25,000	4	6	5	6	6	10	2	2
\$25,000 to \$50,000	13	11	15	12	19	18	6	7
\$50,000 to \$75,000	19	15	20	10	22	21	17	11
\$75,000 to \$100,000	15	15	11	17	15	14	17	15
\$100,000 to \$125,000	14	11	15	11	10	6	16	14
\$125,000 to \$150,000	9	10	4	11	7	5	11	14
\$150,000 to \$200,000	7	8	7	6	4	3	9	12
Over \$200,000	8	10	5	6	3	4	14	14
Refused	12	15	17	20	14	19	8	11
Average income	\$103,000	\$108,000	\$92,000	\$102,000	\$82,000	\$79,000	\$123,000	\$128,000

Expenditures Per Person

Fall/winter visitors reported spending an average of \$920 per person on their Alaska trip, excluding transportation to enter and exit the state. Average spending was highest among vacation/pleasure visitors at \$1,491, followed by business travelers at \$1,046, then VFRs at \$567. On a per-night basis, average spending was \$88 per person, ranging from \$47 among VFRs, to \$106 among business travelers, to \$168 among vacation/pleasure visitors.

Average reported spending differed significantly from 2006-07. Per-person, per-trip spending increased from \$760 to \$920 – however, on a per-night basis, average spending only increased from \$84 to \$88 (because visitors reported longer stays). Taking inflation into account, the overall average increased by 7 percent, while the per-night average decreased by 11 percent. (Summer visitors reported an 11 percent decrease in both per-trip and per-night spending, after adjusting for inflation.)

Average spending among vacation/pleasure visitors showed a more dramatic increase, from \$854 to \$1,491. Again, the increase is less dramatic on a per-night basis (from \$126 to \$168). Once inflation is taken into account, average per-trip spending increased by 54 percent, while average per-night spending increased by 17 percent. Readers are reminded that the sample size among vacation/pleasure visitors is the smallest of the three markets, and was smaller in 2006-07 (227 respondents in 2006-07, 276 in 2011-12). Considering the larger sample size (and smaller margin of error) for 2011-12, the most recent estimate is likely to be more accurate.

VFRs and business travelers reported very small spending differences compared to 2006-07: from \$559 to \$567 among VFRs, and from \$922 to \$1,046 among business travelers.

**TABLE 4.39 - Visitor Expenditures in Alaska, Per Person, Overall
Excluding Transportation to/from Alaska
By Trip Purpose, 2006-07 and 2011-12 (%)**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Less than \$500	61	36	58	17	74	49	49	32
\$501 - \$1,000	19	26	18	25	12	25	25	26
\$1,001 - \$2,500	13	17	14	16	9	13	17	20
\$2,501 - \$5,000	3	7	3	14	1	3	3	8
Over \$5,000	1	3	3	9	1	<1	1	3
Don't know	4	11	5	18	4	9	4	11
Average per person, per trip	\$760	\$920	\$854	\$1,491	\$559	\$567	\$922	\$1,046
Average per person, per night	\$84	\$88	\$126	\$168	\$52	\$47	\$112	\$106

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

The following table provides information on average per person spending by category. The categories with the highest averages were lodging (\$241 per person) and food/beverage (\$240 per person), followed by cars/fuel/transportation (\$135), gifts/souvenirs/clothing (\$114), packages (\$78), tours/activities/entertainment (\$38), and other (\$74). Spending patterns vary significantly by market, with business travelers reporting the highest lodging and transportation figures, and vacation/pleasure visitors reporting higher spending on tours/activities/entertainment and gifts/souvenirs/clothing.

Spending among fall/winter visitors shows some differences between 2006-07 and 2011-12. Average spending on food/beverage, transportation, packages, and tours increased, while average spending on lodging and gifts decreased. Although more pronounced differences appear for each individual market, these changes should be considered in light of their small sample sizes.

**TABLE 4.40 - Visitor Expenditures in Alaska, Per Person, by Category
By Trip Purpose, 2006-07 and 2011-12**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Lodging	\$251	\$241	\$197	\$201	\$70	\$46	\$434	\$395
Food/beverage	191	240	132	291	157	195	235	260
Cars/fuel/transportation	114	135	223	101	45	45	159	207
Gifts/souvenirs/clothing	129	114	141	171	182	150	75	77
Packages	64	78	423	541	*	*	*	*
Tours/activities/entertainment	29	38	43	156	33	28	24	19
Other	n/a	74	n/a	30	n/a	103	n/a	88

* Sample size too small for analysis.

Notes: Spending on airfare and ferry tickets to enter and exit the state is excluded. The "other" category amounts from 2006 are not comparable to 2011 due to a difference in methodology.

Total Expenditures

Visitors' out-of-pocket expenditures totaled nearly \$250 million, excluding transportation costs to travel to and from Alaska. Business visitors' spending was the largest among the trip purpose markets (\$144 million). Out-of-pocket expenditures among VFRs totaled \$54 million; and vacation/pleasure visitors represented \$51 million in in-state spending. Spending increases since 2006-07 reflect the higher average per-person spending amounts reported by visitors in 2011-12.

**TABLE 4.41 - Total Visitor Expenditures in Alaska
in Millions of Dollars
By Trip Purpose, 2006-07 and 2011-12**

	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Total in-state spending	\$189.6	\$248.5	\$25.4	\$50.7	\$59.0	\$54.1	\$105.4	\$143.6

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

Full-Year Expenditures

Combining results of the Summer 2011 and Fall/Winter 2011-12 study periods, total *annual* expenditures are estimated at nearly \$1.8 billion. Cruise packages are not included in the spending figures. Based on the average per person cruise price of \$2,173 and the total volume of 883,000, the cruise market spent approximately \$1.9 billion on cruises and cruise/tour packages in 2011-12.

**TABLE 4.42 - Total Full-Year Visitor Expenditures in Alaska
in Millions of Dollars, 2006-07 and 2011-12**

	Summer		Fall/Winter		Full-Year	
	2006	2011	06-07	11-12	06-07	11-12
Total in-state spending	\$1,524	\$1,508	\$190	\$249	\$1,714	\$1,757

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

