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**AVSP VI – Fall/Winter 2011-12**

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**Section VI:  
Summary Profiles**

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This section reviews results of the 2011-12 fall/winter visitor statistics broken into three “Summary Profiles,” representing 17 different sub-groups. Results for each profile are consolidated into tables summarizing survey results. The following table shows how the Summary Profiles and their respective sub-groups are presented.

**TABLE 6.1 - Selected Summary Profiles**

Profile	Sub-Groups
<b>Destination</b>	Anchorage, Fairbanks, Juneau, Ketchikan, Palmer/Wasilla, Sitka, Girdwood, Seward, Kenai/Soldotna, Southwest, Far North
<b>US Regions</b>	Western US, Midwest US, Southern US, Eastern US
<b>Ferry and Package</b>	Ferry, package

# Summary Profile: Destinations

This profile presents visitors to nine communities with sample sizes over 50, as well as visitors to the Southwest region (with a sample size of 48). Definitions for each sub-group, sample sizes, and maximum margin of error are provided in the table below.

**TABLE 6.2 - Market Definition and Sample Size: Destinations**

Market	Definition	Sample Size	Maximum Margin of Error
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	712	±3.7%
Fairbanks	Visited Fairbanks or North Pole, day and/or overnight	379	5.0
Juneau	Visited Juneau or Douglas, day and/or overnight	129	8.6
Ketchikan	Visited Ketchikan, day and/or overnight	144	8.1
Palmer/Wasilla	Visited Palmer or Wasilla, day and/or overnight	121	8.9
Sitka	Visited Sitka, day and/or overnight	75	11.2
Girdwood/Alyeska	Visited Girdwood or Alyeska, day and/or overnight	94	10.1
Seward	Visited Seward, day and/or overnight	58	12.9
Kenai/Soldotna	Visited Kenai or Soldotna, day and/or overnight	68	11.9
Southwest	Visited any community in the Southwest region, day and/or overnight	48	14.1
Far North	Visited any community in the Far North region, day and/or overnight	59	12.7

There were several key differences between visitors to various communities.

- Far North travelers were far more likely to be traveling for business purposes (67 percent), while Palmer/Wasilla, Girdwood, and Kenai/Soldotna visitors were more likely to be VFRs. Fairbanks and the Southwest regions attracted the largest percentages of vacation/pleasure travelers.
- Visitors to Fairbanks and the Southwest region were more likely to have purchased a multi-day package. Northern Lights packages were most popular among Fairbanks visitors (85 percent of package visitors).
- Air travel was most frequently used to exit Alaska by visitors to all communities, though travelers to Juneau and Ketchikan were slightly more likely to have exited the state via ferry (4 percent and 9 percent, respectively).

- Palmer/Wasilla and Girdwood visitors most often used personal vehicles to travel within the state, whereas visitors to Seward were most likely to use rental vehicles. Visitors to the Southwest and Far North regions were most likely to travel within the state via air.
- Southwest and Far North visitors reported the longest average length of stay in Alaska, each with an average of just over 19 nights. Kenai/Soldotna visitors also reported a long average stay at 15.5 nights. Juneau visitors reported the shortest average trip length at 9.0 nights.
- While Anchorage visitors tended to stay only in the Southcentral region, visitors to other regions often visited Southcentral as well: 78 percent of Far North visitors, 62 percent of Southwest visitors, 34 percent of Fairbanks visitors, and 25 percent of Juneau visitors.
- Palmer/Wasilla, Kenai/Soldotna, and Girdwood visitors were more likely to stay in a private home, while Fairbanks, Juneau, and Anchorage visitors were more likely to stay in a hotel/motel.
- Corresponding to trip purpose, Palmer/Wasilla and Girdwood visitors were more likely to participate in visiting with friends and family, while Far North and Southwest visitors were more likely to do business.
- Sitka visitors reported high rates of wildlife viewing and hiking/nature walks while Fairbanks visitors reported high rates of Northern Lights viewing. Visitors to Seward were most likely to participate in a museum visit.
- Activity data is also presented at the community level, for those communities with large enough sample sizes. Kenai/Soldotna visitors were most likely to participate in various outdoor activities including wildlife viewing (50 percent), ATV/4-wheeling (10 percent), camping (8 percent), snowmobiling (7 percent), and fishing (5 percent). Girdwood visitors were more likely to participate in snow skiing/boarding (24 percent).
- When asked how their trip compared to expectations, visitors to Fairbanks and Sitka gave the highest ratings. Sitka, Seward, and Kenai/Soldotna visitors gave the highest ratings of overall value for the money.
- When asked to rate their overall trip, Seward visitors gave the most “very satisfied” ratings, followed by Girdwood and Sitka. Lower numbers of “very satisfied” ratings were given by visitors to Fairbanks and Anchorage.
- Far North visitors are more likely to be repeat visitors to Alaska, followed by visitors to Ketchikan, Sitka, and Kenai/Soldotna. Similarly, Far North, Ketchikan, and Kenai/Soldotna were most likely to have been to Alaska on vacation before.
- Girdwood visitors were most likely to book their travel arrangements early between August and October 2011, while Ketchikan visitors were most likely to book very late between February and April 2012.

- Prior experience and friends/relatives were the most popular information sources among visitors to all communities, though one out of five visitors to Seward relied on brochures for information.
- Visitors to Girdwood and Seward were most likely to have used the internet to research and book portions of their Alaska trip, while Fairbanks visitors were much more likely to have booked a portion of their trip through a travel agent.
- Travelers from Western US dominated visitation to all regions. Fairbanks had the lowest rate of Western US visitors and the highest rate of international visitors (18 percent).
- Average age was highest among Southwest visitors at 52.2 years, while highest annual household income was reported among Far North visitors at \$122,000. Sitka visitors reported the lowest average income at \$86,000.
- Overall in-state spending per person as well as in-community per person spending was highest among Southwest visitors at \$1,621 and \$968, respectively. Girdwood reported the lowest community based per person spending at \$154, likely due to the higher rate of VFRs and the lower average length of stay among Girdwood visitors.

**TABLE 6.3 - Trip Purpose and Packages  
Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
<b>Trip Purpose</b>						
Business only	43	45	44	41	39	27
Visiting friends/rel.	36	35	27	36	37	51
Vacation/pleasure	13	11	24	17	8	10
Business/pleasure	8	9	4	7	16	12
<b>Purchased multi-day package</b>						
Yes	4	3	14	5	-	2
<b>Package type</b>						
Northern lights	53	*	85	*	*	*
Hunting	13	*	-	*	*	*
Fishing lodge	7	*	1	*	*	*
Skiing package	6	*	-	*	*	*
Rental car/RV	5	*	-	*	*	*
Dog sledding	5	*	4	*	*	*
Motorcoach tour	1	*	2	*	*	*
Adventure tour	1	*	-	*	*	*
Other	9	*	8	*	*	*
	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
<b>Trip Purpose</b>						
Business only	29	20	33	29	41	67
Visiting friends/rel.	43	48	33	47	22	14
Vacation/pleasure	17	17	14	9	23	9
Business/pleasure	11	15	21	15	14	11
<b>Purchased multi-day package</b>						
Yes	5	1	2	-	12	3
<b>Package type</b>						
Northern lights	*	*	*	*	*	*
Hunting	*	*	*	*	*	*
Fishing lodge	*	*	*	*	*	*
Skiing package	*	*	*	*	*	*
Rental car/RV	*	*	*	*	*	*
Dog sledding	*	*	*	*	*	*
Motorcoach tour	*	*	*	*	*	*
Adventure tour	*	*	*	*	*	*
Other	*	*	*	*	*	*

\* Sample size too small for analysis.

**TABLE 6.4 - Transportation Modes  
Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
<b>Exit Mode</b>						
Air	99	100	100	96	91	100
Ferry	1	<1	<1	4	9	<1
<b>Used to Travel Between Communities</b>						
Personal vehicle	17	20	13	12	6	58
Air	16	18	22	36	31	10
Rental vehicle	14	16	16	7	4	33
State ferry	1	1	1	19	12	1
Motorcoach/bus	1	1	5	-	-	2
Train	1	1	5	<1	-	1
Personal RV	<1	<1	-	1	-	<1
Rental RV	<1	<1	1	-	-	-
Don't know/refused	1	1	2	-	-	3
	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
<b>Exit Mode</b>						
Air	96	100	99	100	100	98
Ferry	4	<1	<1	<1	<1	2
<b>Used to Travel Between Communities</b>						
Personal vehicle	1	50	40	43	-	2
Air	23	6	13	31	70	84
Rental vehicle	7	38	53	35	7	14
State ferry	13	1	2	1	3	-
Motorcoach/bus	-	1	4	2	-	<1
Train	-	2	4	-	-	2
Personal RV	-	-	-	<1	-	-
Rental RV	1	-	-	-	-	-
Don't know/refused	-	2	-	-	-	-

**TABLE 6.5 - Length of Stay, Destinations and Lodging Type Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Average length of stay in Alaska	10.5	9.8	11.5	9.0	9.6	12.4
<b>Regions Visited</b>						
Southcentral	77	100	35	27	19	100
Interior	20	11	100	14	2	14
Southeast	10	2	4	100	100	4
Far North	6	6	3	2	3	3
Southwest	5	4	1	5	4	3
<b>Destinations Visited, Top 10</b>						
Anchorage	73	100	34	25	19	93
Fairbanks	19	9	100	13	<1	9
Palmer/Wasilla	12	16	6	9	7	100
Girdwood/Alyeska	10	13	2	2	-	17
Kenai/Soldotna	7	7	3	7	1	10
Seward	6	7	5	5	1	14
Juneau	5	2	4	100	20	4
Ketchikan	4	1	<1	14	100	2
Portage	3	5	2	-	-	7
Homer	3	3	1	1	4	4
<b>Lodging Types Used</b>						
Hotel/motel	56	58	66	59	52	39
Private home	41	41	28	43	46	66
Lodge	3	3	9	2	4	2
B&B	2	2	4	6	7	2
Wilderness camping	1	1	1	3	-	1
Campground/RV	1	1	1	<1	1	4
Other	9	8	15	7	7	5

**TABLE 6.5 - Length of Stay, Destinations and Lodging Type (cont'd)  
Destinations**

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Average length of stay in Alaska	11.5	9.6	12.8	15.5	19.5	19.4
<b>Regions Visited</b>						
Southcentral	12	100	100	100	65	78
Interior	6	5	19	15	6	9
Southeast	100	1	4	5	5	2
Far North	-	3	4	8	7	100
Southwest	-	-	-	2	100	6
<b>Destinations Visited, Top 10</b>						
Anchorage	12	96	91	78	62	78
Fairbanks	6	4	15	9	3	7
Palmer/Wasilla	<1	21	30	18	7	4
Girdwood/Alyeska	<1	100	33	13	-	4
Kenai/Soldotna	-	9	27	100	2	8
Seward	6	20	100	23	-	2
Juneau	22	1	4	5	5	2
Ketchikan	5	-	<1	1	3	2
Portage	-	21	15	11	-	-
Homer	-	7	12	30	4	-
<b>Lodging Types Used</b>						
Hotel/motel	48	55	62	48	56	62
Private home	48	55	46	56	43	29
Lodge	1	2	4	2	10	5
B&B	1	3	4	4	2	1
Wilderness camping	-	1	2	3	5	2
Campground/RV	<1	-	2	2	<1	-
Other	16	4	13	11	20	41

**TABLE 6.6 - Statewide Activities – Top 10 Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Shopping	55	53	61	48	62	65
Business	51	54	46	46	50	36
Visiting friends/relatives	47	46	32	53	53	66
Wildlife viewing	23	22	25	24	32	36
Hiking/nature walk	15	14	13	32	32	22
Museums	12	10	26	11	10	15
Northern Lights viewing	8	5	27	3	<1	11
Snowmobiling	4	4	5	3	5	13
Dog sledding	4	4	15	2	3	8
Snow skiing/boarding	4	4	4	9	4	5
	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Shopping	62	69	67	70	57	49
Business	35	33	50	44	55	77
Visiting friends/relatives	55	63	43	58	45	26
Wildlife viewing	45	40	55	45	30	27
Hiking/nature walk	52	25	37	20	11	4
Museums	19	15	29	12	16	7
Northern Lights viewing	2	4	7	1	9	12
Snowmobiling	2	10	6	6	11	8
Dog sledding	-	6	6	-	4	11
Snow skiing/boarding	7	22	7	2	3	2

\* Sample size too small for analysis.

**TABLE 6.7 - Activities in Communities**

	Anchorage	Fairbanks	Kenai/ Soldotna	Palmer/ Wasilla	Girdwood
Visiting friends/relatives	70	46	70	65	38
Cultural activities	22	45	2	5	-
Museums	16	39	2	3	-
Historical/cultural attractions	4	10	-	3	-
Native cultural tours/act.	4	1	2	-	-
Gold panning/mine tour	-	<1	-	-	-
Wildlife viewing	20	23	50	22	24
Hiking/nature walk	16	11	8	10	18
Shows/Alaska entertainment	5	2	2	4	-
Northern Lights viewing	3	42	-	7	-
City/sightseeing tours	2	14	-	3	5
Snow skiing/boarding	2	3	-	3	24
Snowmobiling	2	5	7	8	11
Biking	1	-	-	-	-
Dog sledding	1	21	-	5	2
Flightseeing	1	4	-	3	-
ATV/4-wheeling	<1	1	10	3	2
Camping	<1	-	8	3	-
Hunting	<1	<1	2	-	-
Fishing	-	1	5	3	-
Tramway/gondola	-	-	-	-	13
Day cruises	-	-	<1	-	-
Other	6	39	5	5	5

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

**TABLE 6.8 - Satisfaction Ratings, Destinations**

	All Visitors		Anchorage		Fairbanks		Juneau		Ketchikan		Palmer/ Wasilla	
<b>Compared to expectations</b>												
Much higher	21		19		36		20		12		18	
Higher	28		30		30		27		25		37	
About as expected	49		50		31		51		60		45	
<b>Value for the money, compared to other destinations</b>												
Much better	13		13		16		11		11		17	
Better	21		22		23		19		25		23	
About the same	46		45		44		46		44		35	
<b>Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)</b>												
Overall exper. in Alaska	61	4.6	60	4.6	58	4.6	63	4.6	61	4.6	64	4.6
Friendliness of residents	66	4.6	65	4.6	66	4.6	77	4.7	77	4.8	72	4.7
Sightseeing	60	4.6	62	4.6	58	4.5	64	4.6	50	4.4	61	4.6
Tours and activities	58	4.5	58	4.5	64	4.6	76	4.7	69	4.6	62	4.6
Accommodations	50	4.4	51	4.5	41	4.3	44	4.4	52	4.4	57	4.5
Wildlife viewing	50	4.4	50	4.4	45	4.3	73	4.7	54	4.3	48	4.5
Visitor info. services	48	4.4	49	4.4	51	4.4	40	4.3	74	4.7	56	4.4
Restaurants	42	4.3	45	4.4	34	4.1	33	4.2	45	4.3	47	4.4
Shopping	32	4.2	36	4.2	22	4.0	23	4.0	23	4.0	36	4.3
Value for the money	32	4.0	31	4.0	32	3.9	35	4.0	41	4.2	31	3.9
Transportation within Alaska	31	4.2	31	4.2	31	4.2	36	4.3	41	4.3	34	4.2
Very likely to recommend Alaska	70		68		73		72		80		72	
Very likely to return to Alaska in next five years	76		75		71		77		79		74	
	Sitka		Girdwood		Seward		Kenai/ Soldotna		Southwest		Far North	
<b>Compared to expectations</b>												
Much higher	32		25		27		19		15		12	
Higher	26		31		54		31		17		31	
About as expected	42		45		20		45		64		57	
<b>Value for the money, compared to other destinations</b>												
Much better	23		10		22		21		9		7	
Better	13		26		14		15		17		22	
About the same	52		48		37		40		54		26	
<b>Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)</b>												
Overall exper. in Alaska	69	4.6	69	4.7	76	4.8	68	4.7	62	4.6	65	4.6
Friendliness of residents	86	4.8	73	4.7	77	4.8	71	4.7	65	4.6	65	4.5
Sightseeing	55	4.6	67	4.7	71	4.7	64	4.6	73	4.6	53	4.5
Tours and activities	62	4.6	69	4.7	66	4.6	66	4.7	48	4.4	39	4.3
Accommodations	50	4.4	54	4.4	52	4.3	56	4.5	34	4.2	32	4.3
Wildlife viewing	78	4.7	59	4.5	63	4.5	54	4.4	53	4.5	46	4.4
Visitor info. services	31	4.3	49	4.5	42	4.3	59	4.4	67	4.7	51	4.5
Restaurants	36	4.1	55	4.5	40	4.2	50	4.5	28	4.1	33	4.2
Shopping	24	4.0	49	4.4	31	4.1	35	4.3	18	3.7	17	4.1
Value for the money	45	4.2	38	4.2	36	4.0	38	4.1	26	3.9	31	3.9
Transportation within Alaska	41	4.2	38	4.3	43	4.2	30	4.2	26	4.1	34	4.3
Very likely to recommend Alaska	77		69		83		76		67		81	
Very likely to return to Alaska in next five years	79		65		73		79		73		81	

**TABLE 6.9 - Previous Alaska Travel Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Been to Alaska before for vacation	74	74	61	78	83	75
Average # of vacation trips (base: repeaters)	4.4	4.4	3.6	3.6	5.0	6.3
<b>Previous mode of transportation used to enter/exit Alaska</b>						
Air	96	96	93	93	91	93
Cruise	3	3	4	2	1	4
Highway	2	2	3	1	3	7
Ferry	1	1	2	3	7	2
	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Been to Alaska before for vacation	73	67	52	80	78	85
Average # of vacation trips (base: repeaters)	4.9	2.6	2.1	7.5	4.7	1.8
<b>Previous mode of transportation used to enter/exit Alaska</b>						
Air	94	93	96	92	99	100
Cruise	2	5	4	4	-	2
Highway	2	3	-	4	3	2
Ferry	3	2	-	-	1	-

**TABLE 6.10 - Trip Planning  
Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
<b>Trip Decision – Top Three Periods</b>						
Aug-Oct 2011	32	32	27	28	24	36
Nov 2011-Jan 2012	31	31	35	27	25	28
Feb-April 2012	21	20	18	24	31	15
<b>Trip Booking – Top Three Periods</b>						
Nov 2011-Jan 2012	35	36	37	28	26	30
Aug-Oct 2011	33	33	28	27	29	41
Feb-Apr 2012	24	23	23	30	34	20
<b>Internet and Travel Agent Usage</b>						
Used Internet	80	80	80	76	71	80
Booked over Internet	74	76	68	71	63	77
Booked through travel agent	17	16	28	8	17	13
<b>Other Sources – Top 10</b>						
Prior experience	62	63	42	66	83	65
Friends/relatives	57	56	41	66	80	49
Brochures	10	10	11	12	16	11
Cell phone apps	6	6	4	7	3	8
Hotel/lodge	6	6	6	4	7	4
Television	5	4	6	1	3	3
Magazine	4	4	3	3	2	5
Travel guide/book	3	3	10	7	4	5
AAA	3	3	1	5	<1	7
Newspaper	3	3	2	2	1	4

**TABLE 6.10 - Trip Planning (Cont'd)  
Destinations**

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
<b>Trip Decision – Top Three Periods</b>						
Aug-Oct 2011	38	39	32	38	38	25
Nov 2011-Jan 2012	25	25	24	27	24	31
Feb-Apr 2012	18	17	17	20	15	29
<b>Trip Booking – Top Three Periods</b>						
Nov 2011-Jan 2012	26	24	29	29	35	35
Aug-Oct 2011	41	47	38	40	29	32
Feb-Apr 2012	20	23	20	22	20	33
<b>Internet and Travel Agent Usage</b>						
Used Internet	83	86	89	83	72	85
Booked over Internet	78	82	79	78	65	73
Booked through travel agent	6	11	17	10	21	16
<b>Other Sources – Top 10</b>						
Prior experience	67	56	38	71	68	81
Friends/relatives	84	60	60	66	62	54
Brochures	17	15	21	16	9	5
Cell phone apps	7	8	9	5	7	2
Hotel/lodge	15	7	11	5	7	2
Television	2	8	13	6	11	1
Magazine	2	4	12	8	9	6
Travel guide/book	8	5	10	1	<1	3
AAA	2	3	7	5	2	2
Newspaper	-	2	2	8	7	2

**TABLE 6.11 - Demographics  
Destinations**

	All Visitors	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
<b>Origin</b>						
Western US	62	62	47	67	77	62
Southern US	16	16	19	11	6	12
Midwestern US	9	9	8	17	11	12
Eastern US	5	5	7	2	1	6
Canada	3	3	2	1	4	3
Other International	5	4	18	2	1	6
<b>Other Demographics</b>						
Average party size	1.4	1.4	1.5	1.5	1.5	1.6
Average group size	2.2	2.3	2.5	2.1	1.8	3.3
Male/female	57/43	57/43	58/42	70/30	61/39	49/51
Average age	47.8	47.5	46.5	45.4	44.6	46.3
Children in household	32	34	29	28	34	21
Retired/semi-retired	22	21	18	22	20	26
College graduate	59	60	57	64	59	55
Average income	\$108,000	\$111,000	\$105,000	\$96,000	\$98,000	\$91,000
	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
<b>Origin</b>						
Western US	66	56	46	55	67	55
Southern US	8	19	19	26	6	17
Midwestern US	12	14	14	11	18	11
Eastern US	11	6	11	3	7	7
Canada	2	2	-	2	-	4
Other International	2	4	10	2	3	6
<b>Other Demographics</b>						
Average party size	1.8	1.7	1.5	1.4	1.6	1.1
Average group size	2.8	2.3	2.4	2.2	1.9	1.5
Male/female	57/43	43/57	47/53	51/49	79/21	64/36
Average age	45.1	43.9	42.5	48.9	52.2	49.3
Children in household	33	23	34	25	39	35
Retired/semi-retired	29	18	16	39	25	17
College graduate	65	65	59	47	60	54
Average income	\$86,000	\$105,000	\$94,000	\$95,000	\$103,000	\$122,000

**TABLE 6.12 - Visitor Expenditures, Per Person  
Destinations**

	Anchorage	Fairbanks	Juneau	Ketchikan	Palmer/ Wasilla
Average per-person total spent in Alaska	\$908	\$1,235	\$1,002	\$817	\$1,012
Average per-person total spent in community	\$629	\$827	\$345	\$421	\$151
Lodging	219	221	117	138	24
Tours/activity/entertainment	13	42	6	12	9
Gifts/souvenirs/clothing	79	136	41	52	40
Food/beverage	190	165	120	142	64
Rental cars/fuel/transportation	107	167	60	63	13
Other	21	96	1	14	1

  

	Sitka	Girdwood	Seward	Kenai/ Soldotna	Southwest	Far North
Average per-person total spent in Alaska	\$661	\$936	\$1,123	\$997	\$1,621	\$1,076
Average per-person total spent in community	\$363	\$154	\$299	\$290	\$968	\$550
Lodging	105	38	13	81	211	102
Tours/activity/entertainment	13	55	31	8	19	5
Gifts/souvenirs/clothing	66	13	11	30	106	62
Food/beverage	136	45	35	103	238	133
Rental cars/fuel/transportation	27	3	17	67	147	3
Other	16	-	192	1	247	245

Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community.

# Summary Profile: US Regions

This chapter profiles the US market by region: West, Midwest, South, and East. Visitors from Canada are not profiled because their sample size was insufficient. Definitions for each region, sample sizes, and margins of error are provided in the table below.

**TABLE 6.13 - Market Definition and Sample Size  
US Regions**

Market	Definition	Sample Size	Maximum Margin of Error
Western US	From Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, or Wyoming	784	±3.5%
Southern US	From Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, or Virginia	187	7.2
Midwest US	From Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, or Wisconsin	120	8.9
Eastern US	From Connecticut, Delaware, Maine, Massachusetts, Maryland, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington, D.C, or West Virginia	63	12.3

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

- Nearly half of Western and Southern US visitors were traveling for business while Midwest and Eastern US visitors were more likely to be VFRs. Western US travelers were least likely to be vacation/pleasure visitors, at 8 percent.
- Midwest visitors were more likely than those from other regions to travel within the state by personal vehicle or air, whereas Eastern visitors were more likely to travel in-state by rental vehicle.
- The average length of stay was longer among Southern visitors at 12.2 nights, compared to 10.5 nights among the overall market.
- While visitation to the Southcentral region of Alaska was similar throughout the US market, Southern and Eastern visitors were more likely visit the Interior region while Midwest visitors were more likely to have traveled to Southeast. Eastern visitors were twice as likely than the overall market to visit Seward.
- Southern visitors were most likely to have stayed in a hotel/motel on their trip while Midwestern visitors were most likely to stay in a private home, reflecting the higher rate of VFRs.

- Activity participation was similar among visitors from different regions with primary differences in business and visiting friends/relatives reflected by the purpose of their trip. Midwestern visitors were somewhat more likely to have participated in hiking/nature walking and Northern Lights viewing.
- When asked how their Alaska trip compared to expectations, Southern and Eastern visitors gave much higher ratings. Also, visitors from these regions gave the highest ratings of value for the money.
- Overall satisfaction with their Alaska experience was similar among visitors from various US regions, though Midwestern visitors were slightly more likely to be “very satisfied” (65 percent vs. 61 percent for the overall market). Eastern visitors were much more likely to be “very satisfied” with sightseeing on their trip, at 71 percent, compared to 60 percent of the overall market and 57 percent of Southern visitors.
- Eight out of ten Western visitors had previously traveled to Alaska for vacation, compared to 67 percent of Midwestern visitors, 66 percent of Southern visitors, and 64 percent of Eastern visitors. Air was the most common form of previous travel among all groups.
- Roughly one-third of US visitors decided on their trip either between August and October 2011 or between November 2011 and January 2012, with the exception of Midwestern travelers who were somewhat more likely to decide between August and October 2011 (43 percent).
- Southern visitors were somewhat more likely to book between November 2011 and January 2012 (40 percent vs. 35 percent of the total market), whereas Midwestern visitors were more likely to book between August and October 2011 (49 percent vs. 33 percent of the total market).
- Eight out of ten visitors from the various US regions used the internet to research their trip, and seven out of ten booked a portion through the internet. Midwestern visitors were more likely than others to have booked a portion of their trip through a travel agent (22 percent vs. 17 percent of total visitors).
- Demographics were similar among US travelers, though Eastern visitors were slightly more likely to be female at 51 percent vs. 43 percent of the total market. Midwestern visitors were somewhat older, averaging 51.5 years, compared to 47.8 years for total visitors. Southern visitors reported the highest average annual household income at \$112,000.

**TABLE 6.14 - Trip Purpose and Packages  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
<b>Trip Purpose</b>					
Business only	43	48	29	45	31
Visiting friends/relatives	36	37	46	29	43
Vacation/pleasure	13	8	15	16	14
Business/pleasure	8	8	10	9	12
<b>Purchased multi-day package</b>					
Yes	4	1	5	4	3
<b>Package type</b>					
Northern lights	53	*	*	*	*
Hunting	13	*	*	*	*
Fishing lodge	7	*	*	*	*
Skiing package	6	*	*	*	*
Rental car/RV	5	*	*	*	*
Dog sledding	5	*	*	*	*
Motorcoach tour	1				
Adventure tour	1				
Other	9	*	*	*	*

\* Sample size too small for analysis.

**TABLE 6.15 - Transportation Modes  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
<b>Exit Mode</b>					
Air	99	99	99	100	100
Ferry	1	1	1	<1	-
<b>Used to Travel Between Communities</b>					
Personal vehicle	17	17	24	15	11
Air	16	15	20	14	13
Rental vehicle	14	11	16	19	24
State ferry	1	1	2	1	2
Motorcoach/bus	1	1	1	3	-
Train	1	<1	1	<1	1
Rental RV	<1	<1	-	-	1
Personal RV	<1	<1	-	-	-
Don't know/refused	1	1	1	1	-

**TABLE 6.16 - Length of Stay, Destinations and Lodging Type  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
Average length of stay in Alaska	10.5	10.2	9.4	12.2	12.0
<b>Regions Visited</b>					
Southcentral	77	77	78	77	78
Interior	20	15	18	27	27
Southeast	10	12	14	6	5
Far North	6	5	6	6	8
Southwest	5	5	9	2	6
<b>Destinations Visited, Top 10</b>					
Anchorage	73	73	71	75	75
Fairbanks	19	14	16	22	25
Palmer/Wasilla	12	13	15	9	15
Girdwood/Alyeska	10	9	15	12	10
Kenai/Soldotna	7	6	8	11	4
Seward	6	4	9	7	13
Juneau	5	6	9	4	2
Ketchikan	4	5	4	1	1
Portage	3	2	5	8	6
Homer	3	3	1	5	-
<b>Lodging Types Used</b>					
Hotel/motel	56	55	52	62	57
Private home	41	43	49	36	46
Lodge	3	2	3	3	5
B&B	2	1	3	4	4
Wilderness camping	1	1	4	2	-
Campground/RV	1	<1	-	1	4
Other	9	8	8	13	4

**TABLE 6.17 - Activities – Top 10  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
Shopping	55	50	53	64	60
Business	51	55	39	53	41
Visiting friends/relatives	47	49	55	43	51
Wildlife viewing	23	21	23	28	25
Hiking/nature walk	15	11	27	16	24
Museums	12	7	14	15	22
Northern Lights	8	4	10	7	7
Snowmobiling	4	4	2	6	5
Dog sledding	4	2	2	3	4
Snow skiing/boarding	4	3	5	4	5

**TABLE 6.18 - Satisfaction Ratings  
US Regions**

	All Visitors		Western US		Midwest US		Southern US		Eastern US	
<b>Compared to expectations</b>										
Much higher	21		19		10		27		27	
Higher	28		24		37		25		39	
About as expected	49		55		51		47		34	
<b>Value for the money, compared to other destinations</b>										
Much better	13		13		5		18		17	
Better	21		20		23		17		18	
About the same	46		49		48		38		43	
<b>Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)</b>										
Overall experience in Alaska	61	4.6	60	4.6	65	4.6	63	4.6	61	4.6
Friendliness of residents	66	4.6	65	4.6	60	4.5	71	4.7	67	4.6
Sightseeing	60	4.6	62	4.6	63	4.6	57	4.5	71	4.7
Tours and activities	58	4.5	60	4.6	49	4.4	69	4.7	56	4.6
Accommodations	50	4.4	50	4.5	54	4.5	50	4.5	49	4.5
Wildlife viewing	50	4.4	52	4.4	52	4.3	51	4.4	48	4.3
Visitor information services	48	4.4	54	4.5	45	4.4	48	4.3	35	4.3
Restaurants	42	4.3	44	4.3	41	4.4	43	4.3	40	4.3
Shopping	32	4.2	32	4.1	26	4.2	34	4.2	44	4.3
Value for the money	32	4.0	33	4.0	20	3.9	33	4.1	24	3.9
Transportation within Alaska	31	4.2	32	4.2	26	4.0	32	4.2	36	4.3
Very likely to recommend Alaska as a vacation destination	70		72		73		71		63	
Very likely to return to Alaska in the next five years	76		81		73		75		70	

**TABLE 6.19 - Previous Alaska Travel  
US Regions**

	All Visitors		Western US		Midwest US		Southern US		Eastern US	
Been to Alaska before for vacation	74		81		67		66		64	
Average # of vacation trips (base: repeaters)	4.4		5.1		5.3		2.1		3.5	
<b>Previous mode of transportation used to enter/exit Alaska</b>										
Air	96		96		95		93		98	
Cruise	3		1		7		7		5	
Highway	2		3		3		1		-	
Ferry	1		1		<1		1		-	

**TABLE 6.20 - Trip Planning  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
<b>Trip Decision – Top Three Periods</b>					
Aug-Oct 2011	32	30	43	29	31
Nov 2011-Jan 2012	31	33	19	32	31
Feb-Apr 2012	21	23	17	18	15
<b>Trip Booking – Top Three Periods</b>					
Nov 2011-Jan 2012	35	37	26	40	30
Aug-Oct 2011	33	30	49	31	33
Feb-Apr 2012	24	27	17	19	20
<b>Internet and Travel Agent Usage</b>					
Used Internet	80	80	81	78	82
Booked over Internet	74	76	70	74	74
Booked through travel agent	17	13	22	18	15
<b>Other Sources – Top 10</b>					
Prior experience	62	68	60	55	59
Friends/relatives	57	57	63	56	64
Brochures	10	7	15	9	13
Cell phone apps	6	6	8	6	4
Hotel/lodge	6	4	6	7	7
Television	5	3	5	9	6
Magazine	4	3	5	6	2
Travel guide/book	3	2	3	2	6
AAA	3	3	7	2	2
Newspaper	3	3	2	1	3

**TABLE 6.21 - Demographics  
US Regions**

	All Visitors	Western US	Midwest US	Southern US	Eastern US
Average party size	1.4	1.4	1.6	1.4	1.5
Average group size	2.2	1.9	2.3	2.8	1.7
Male/female	57/43	58/42	60/40	55/45	49/51
Average age	47.8	47.2	51.5	47.7	47.6
Children in household	32	33	29	30	33
Retired/semi-retired	22	22	28	19	22
College graduate	59	58	59	54	70
Average income	\$108,000	\$109,000	\$102,000	\$112,000	\$96,000

# Summary Profiles: Ferry and Package

This chapter profiles the ferry market and the package market. Definitions of each market, sample sizes, and maximum margin of error are provided in the table below.

**TABLE 6.22 - Market Definition and Sample Size  
Ferry Market and Package Market**

Market	Definition	Sample Size	Maximum Margin of Error
Ferry	Traveled by Alaska Marine Highway at some point on trip	68	±11.8%
Package	Purchased a multi-day travel package	152	7.9

The ferry market differed from the overall Alaska visitor market in the following ways:

- Ferry visitors were much more likely to travel for vacation/pleasure purposes (29 percent vs. 13 percent of the total market). They were also more likely to combine business and pleasure (16 percent vs. 8 percent), but much less likely to travel for business purposes only (4 percent vs. 43 percent).
- Ferry visitors most commonly used the state ferry system and personal vehicles to travel between communities within the state (42 percent and 21 percent, respectively). (The 58 percent of ferry travelers who did *not* ferry between communities within the state used the ferry to enter or exit the state.)
- Average length of stay for ferry visitors was significantly longer than the overall market, at 16.0 nights compared to 10.5 nights. Nearly all visited the Southeast region (99 percent), with 65 percent visiting Ketchikan and 41 percent visiting Juneau. This compares to just 4 and 5 percent of the overall market, respectively.
- Sixty-four percent of ferry travelers stayed in a private home compared to 41 percent of the total market, while one-third stayed in a hotel/motel, versus 56 percent of all travelers.
- Ferry visitors were much more likely to participate in shopping (79 percent), visiting friends/relatives (49 percent), wildlife viewing (38 percent), and hiking/nature walks (38 percent) than the overall market.
- When asked how their Alaska experience compared to expectations, 71 percent said it was as expected compared to half of the overall market.
- Compared to the overall market, ferry visitors gave higher “overall experience ratings” (72 percent very satisfied, compared to 61 percent).
- Ferry travelers are more likely to recommend Alaska as vacation destination but slightly less likely to return in the next five years.

- Four out of five ferry visitors had been to Alaska before for vacation (similar to the overall visitor rate of 71 percent). Repeat ferry visitors were much more likely than the overall market to have traveled by highway or ferry on their last trip.
- Ferry visitors were much more likely to use brochures as a trip planning source when compared to the overall market (40 versus 10 percent).
- Like the overall market, the majority of ferry visitors were from the Western US (69 percent). Ferry visitors were less likely to be from the South, and more likely to be from Canada.
- Ferry travelers were less likely to be college graduates than the total visitor market (42 percent vs. 59 percent) and earned a lower average annual household income of \$70,000 compared to the total average of \$108,000.

Those that purchased a multi-day travel package, just 4 percent of total visitors, differed from the overall market in a number of ways.

- Nine out of ten package purchasers were traveling for the purpose of vacation/pleasure, compared to just 13 percent of the overall fall/winter market.
- Over one-quarter traveled within the state by air, compared to 16 percent of total visitors. Many also traveled via motorcoach/bus and train (16 percent and 15 percent, respectively) versus just 1 percent of total visitors that used each of those modes.
- Package purchasers averaged 6.1 nights in Alaska, significantly lower than the total market. They were much more likely to have visited Fairbanks than the overall market (62 percent vs. 19 percent), but somewhat less likely to have visited Anchorage (49 percent vs. 73 percent).
- Nine out of ten stayed in a hotel/motel and one-third overnighted in a lodge.
- Package travelers were much more likely to participate in a number of activities including shopping (73 percent), museum visits (55 percent), Northern Lights viewing (55 percent), and dog sledding (44 percent).
- This group was twice as likely to rate their Alaska experience as much higher than expectations, though those “very satisfied” with various aspects of their trip were similar (and in some cases slightly lower) than total visitors.
- Package purchasers were significantly less likely to indicate they would return to Alaska in the next five years (42 percent vs. 76 percent of the overall market). Similarly, just one-third had previously been to Alaska on vacation, compared to 74 percent of total visitors. Of those that had, one out of five traveled via cruise.
- Over two out of five package travelers had decided on their trip and booked arrangements between August and October 2011. Although just half had booked a portion of their trip over the internet, compared to 74 percent of the total market, 43 percent booked through a travel agent (versus 17 percent of total travelers).
- Package travelers were much more likely than the overall market to get information about their trip through travel brochures, television, and travel/guide books.

- Half of package purchasers were from international countries, compared to 5 percent of the overall market. One out of five were from the Western US versus 62 percent of total visitors.
- The average age of package travelers was higher than the overall market (55.4 years vs. 47.8 years) and average annual income was also notably higher at \$115,000 versus \$108,000.

**TABLE 6.23 - Trip Purpose and Packages  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
<b>Trip Purpose</b>			
Business only	43	4	4
Visiting friends/relatives	36	50	1
Vacation/pleasure	13	29	87
Business/pleasure	8	16	8
<b>Purchased multi-day package</b>			
Yes	4	6	100
<b>Package type</b>			
Northern lights	53	*	53
Hunting	13	*	13
Fishing lodge	7	*	7
Skiing package	6	*	6
Rental car/RV	5	*	5
Dog sledding	5	*	5
Motorcoach tour	1	*	1
Adventure tour	1	*	1
Other	9	*	9

\* Sample size too small for analysis.

**Transportation Modes  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
<b>Exit Mode</b>			
Air	99	27	99
Ferry	1	73	1
<b>Used to Travel Between Communities</b>			
Personal vehicle	17	21	4
Air	16	12	28
Rental vehicle	14	1	12
State ferry	1	42	1
Motorcoach/bus	1	-	16
Train	1	1	15
Personal RV	<1	-	-
Rental RV	<1	-	-
Don't know/refused	1	-	-

**TABLE 6.24 - Length of Stay, Destinations and Lodging Type  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
Average length of stay in Alaska	10.5	16.0	6.1
<b>Regions Visited</b>			
Southcentral	77	22	54
Interior	20	5	65
Southeast	10	99	7
Southwest	5	-	14
Far North	6	-	4
<b>Destinations Visited, Top 10</b>			
Anchorage	73	22	49
Fairbanks	19	3	62
Palmer/Wasilla	12	4	5
Girdwood/Alyeska	10	1	3
Kenai/Soldotna	7	-	-
Seward	6	1	3
Juneau	5	41	6
Ketchikan	4	65	-
Portage	3	-	3
Homer	3	-	-
<b>Lodging Types Used</b>			
Hotel/motel	56	32	90
Private home	41	64	7
Lodge	3	4	33
B&B	2	7	5
Wilderness camping	1	-	6
Campground/RV	1	4	-
Other	9	8	7

**TABLE 6.25 - Visitor Activities – Top 10  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
Shopping	55	79	73
Business	51	19	9
Visiting friends/relatives	47	69	11
Wildlife viewing	23	38	32
Hiking/nature walk	15	38	16
Museums	12	15	55
Northern Lights	8	1	55
Snowmobiling	4	1	5
Dog sledding	4	1	44
Snow skiing/boarding	4	12	12

**TABLE 6.26 - Satisfaction Ratings  
Ferry Market and Package Market**

	All Visitors		Ferry		Package	
<b>Compared to expectations</b>						
Much higher	21		10		40	
Higher	28		18		33	
About as expected	49		71		25	
<b>Value for the money, compared to other destinations</b>						
Much better	13		8		14	
Better	21		31		22	
About the same	46		35		48	
<b>Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)</b>						
Overall experience in Alaska	61	4.6	72	4.6	62	4.6
Accommodations	50	4.4	58	4.5	33	4.1
Restaurants	42	4.3	27	4.1	24	3.8
Shopping	32	4.2	15	3.9	12	3.7
Visitor information services	48	4.4	29	4.1	43	4.2
Sightseeing	60	4.6	45	4.3	59	4.4
Tours and activities	58	4.5	49	4.3	59	4.5
Wildlife viewing	50	4.4	56	4.4	43	4.2
Transportation within Alaska	31	4.2	47	4.4	31	4.1
Friendliness of residents	66	4.6	69	4.7	66	4.6
Value for the money	32	4.0	29	3.9	26	3.9
Very likely to recommend Alaska as a vacation destination	70		81		65	
Very likely to return to Alaska in the next five years	76		71		42	

**TABLE 6.27 - Previous Alaska Travel  
Ferry Market and Package Market**

	All Visitors		Ferry		Package	
Been to Alaska before for vacation	74		79		36	
Average # of vacation trips (base: repeat travelers)	4.4		5.6		3.7	
<b>Previous mode of transportation used to enter/exit Alaska</b>						
Air	96		62		86	
Cruise	3		4		19	
Highway	2		12		-	
Ferry	1		30		6	

**TABLE 6.28 - Trip Planning  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
<b>Trip Decision – Top Three Periods</b>			
Aug-Oct 2011	32	19	43
Nov 2011-Jan 2012	31	32	19
Feb-Apr 2012	21	19	6
<b>Trip Booking – Top Three Periods</b>			
Nov 2011-Jan 2012	35	34	24
Aug-Oct 2011	33	19	48
Feb-Apr 2012	24	28	9
<b>Internet and Travel Agent Usage</b>			
Used Internet	80	79	72
Booked over Internet	74	60	51
Booked through travel agent	17	4	43
<b>Other Sources – Top 10</b>			
Prior experience	62	73	26
Friends/relatives	57	77	33
Brochures	10	40	24
Cell phone apps	6	4	<1
Hotel/lodge	6	4	4
Television	5	1	16
Magazine	4	1	7
Travel guide/book	3	4	14
AAA	3	3	5
Newspaper	3	1	5

**TABLE 6.29 - Demographics  
Ferry Market and Package Market**

	All Visitors	Ferry	Package
<b>Origin</b>			
Western US	62	69	20
Southern US	16	4	14
Midwestern US	9	8	12
Eastern US	5	-	4
Canada	3	12	-
Other International	5	6	51
<b>Other Demographics</b>			
Average party size	1.4	1.9	2.2
Average group size	2.2	2.0	4.3
Male/female	57/43	62/38	68/32
Average age	47.8	40.1	55.4
Children in household	32	29	31
Retired/semi-retired	22	32	28
College graduate	59	42	64
Average income	\$108,000	\$70,000	\$115,000

