Alaska Visitor Statistics Program VI

Fall/Winter 2011-12

Conducted by McDowell Group

Alaska Department of Commerce, Community, and Economic Development
Division of Economic Development

Alaska Visitor Statistics Program VI

Fall/Winter 2011-12

Prepared for:

STATE OF ALASKA

Alaska Department of Commerce,
Community, and Economic Development

Division of Economic Development

Conducted by:

McDowell Group

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AVSP Overview

The Alaska Visitor Statistics Program (AVSP) is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community, and Economic Development. The study provides state government and the tourism industry essential information on one of Alaska's major economic engines: out-of-state visitors. AVSP VI (the sixth generation of the program) consists of two main components:

Visitor Volume: The visitor volume estimate is a count of the number of out-of-state visitors exiting Alaska, by transportation mode, during the study period.

Visitor Survey: The visitor survey is administered to a sample of out-of-state visitors departing Alaska at all major exit points. The survey includes questions on trip purpose, transportation modes used, length of stay, destinations, lodging, activities, expenditures, satisfaction, trip planning, and demographics.

The study is undertaken in two stages: Summer 2011 (May 1-September 30) and Fall/Winter 2011-12 (October 1-April 30). This report addresses the fall/winter period.

Project Team

The AVSP VI project team was led by McDowell Group, Inc., a research and consulting firm with offices in Juneau and Anchorage. McDowell Group was assisted by Fusion MR of Portland, Oregon, and MR Data of Seaview, Washington.

Methodology

The fall/winter visitor volume estimate was based on visitor/resident tallies of 38,015 travelers exiting Alaska via domestic and international air. The resulting ratios were applied, by month and by location, to airport enplanements to arrive at visitor volume estimates. Tallies of highway travelers were not conducted in 2011-12; instead, visitor/resident ratios from 2006-07 were applied to 2011-12 highway traffic to arrive at volume estimates. Tallies of ferry passengers were not conducted because the Alaska Marine Highway System (AMHS) provides passenger residency information to the AVSP.

The visitor survey included 1,364 intercept surveys. (Online surveying was conducted during the summer fielding period only.) Visitors were surveyed at major exit points: airports in Anchorage, Fairbanks, Juneau, Ketchikan, and Sitka; and the Ketchikan ferry terminal. The highway mode was not sampled in fall/winter because of safety concerns, and the statistical inefficiency of surveying such a small population. The response rate for the fall/winter survey was 82 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

Please see *Section VII: Methodology* for further details on fall/winter methodology; additional details on AVSP VI methodology can be found in the summer report at the following link:

http://www.commerce.state.ak.us/ded/dev/toubus/research.htm

Fall/Winter Visitor Volume

An estimated 266,800 out-of-state visitors came to Alaska between October 2011 and April of 2012. The vast majority (94 percent; 250,500) exited Alaska via domestic air. Other exit modes included highway (4 percent; 10,000), international air (2 percent; 4,800), and ferry (<1 percent; 1,500).

The 2011-12 fall/winter period shows a 9 percent increase over the previous fall/winter of 2010-11, from 244,100 visitors to 266,800. The increase was likely more modest in actuality: exiting visitor traffic (residents and visitors combined) was up by 4 percent. The 2011-12 estimate reflects updated visitor/resident ratios, which show that since the last time ratios were collected (in 2006-07) the percentage of travelers that are out-of-state visitors has increased. The large increase in volume in 2011-12 was likely incremental over the last several years as the visitor ratio increased gradually.

CHART 1.1 - Alaska Visitor Volume, Fall/Winter 2011-12, by Exit Mode

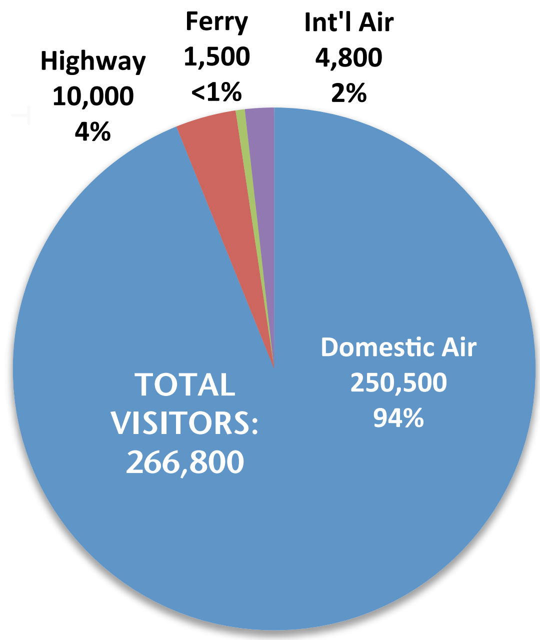
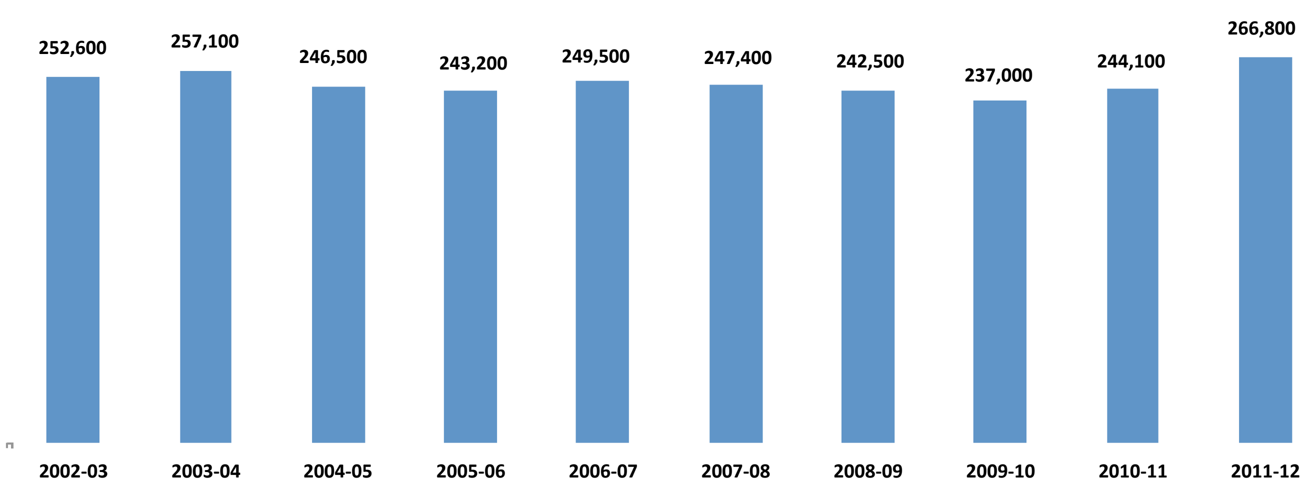


CHART 1.2 - Alaska Visitor Volume, Fall/Winter 2002-03 to 2011-12



Sources: 2005-2011 data from AVSP V and VI (conducted by McDowell Group); 2002-2004 data from AVSP IV (conducted by Northern Economics, Inc.).

Full Year Visitor Volume

Adding fall/winter visitor volume to summer visitor volume yields a full-year (May 2011-April 2012) volume estimate of 1,823,600. The fall/winter period represents 15 percent of full-year volume.

Of full-year visitors, 48 percent were cruise ship passengers, 47 percent were air visitors (entered and exited the state by air), and 4 percent were highway/ferry visitors (entered or exited the state by highway or ferry).

Full-year visitor volume for 2011-12 shows a 3 percent increase over the previous full-year period (2010-11), the first increase in annual visitation in four years. The most recent full-year period was 7 percent below the peak volume set in 2007-08, but still 19 percent above visitor volume of a decade ago (2002-03).

CHART 1.3 - Alaska Visitor Volume, Full Year 2011-12

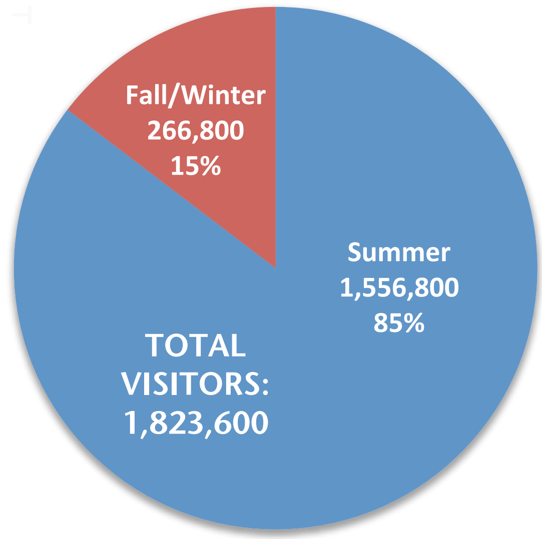
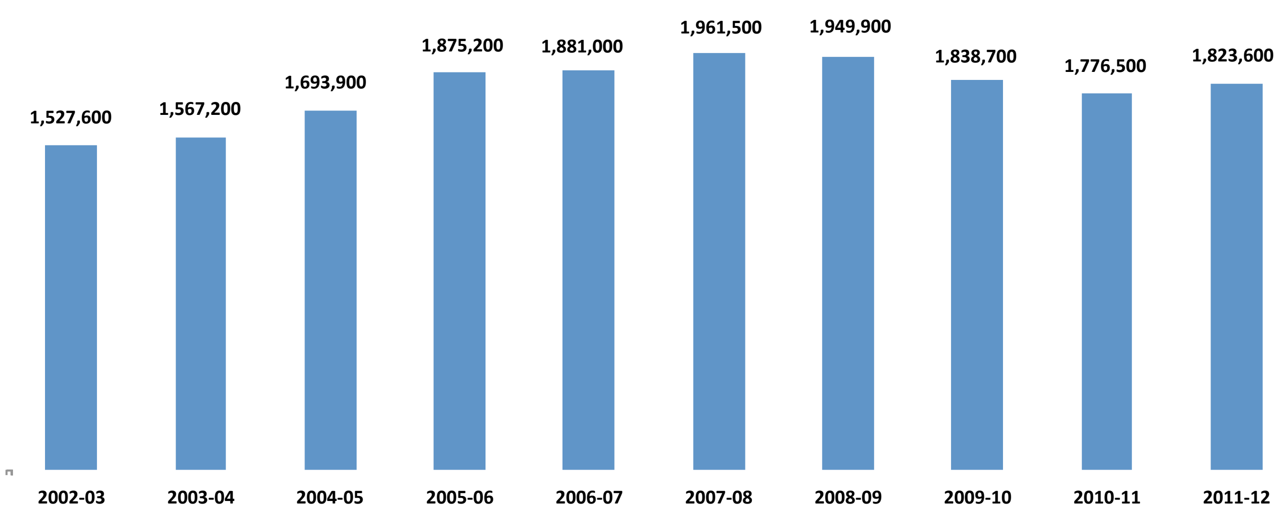


CHART 1.4 - Full Year Alaska Visitor Volume, 2002-03 to 2011-12



Sources: 2005-2012 data from AVSP V and VI (conducted by McDowell Group); 2002-2004 data from AVSP IV (conducted by Northern Economics, Inc.).

Trip Purpose and Packages

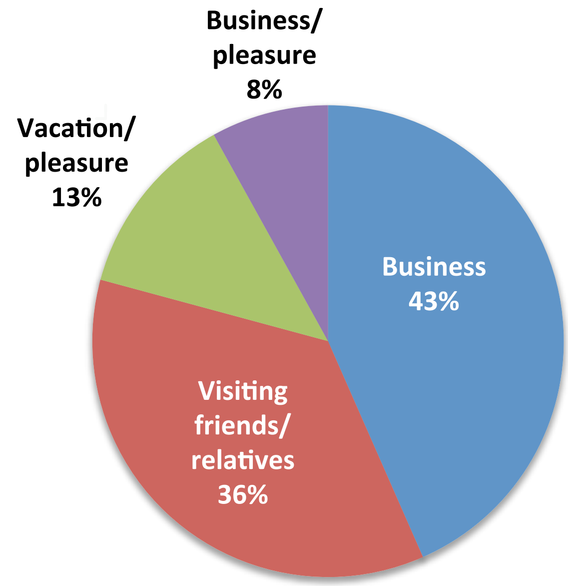
Trip Purpose

Just over half of fall/winter visitors in 2011-12 were traveling for business, including 43 percent whose purpose was business only, and 8 percent combining business with pleasure. Those visiting friends or relatives (VFRs) made up 36 percent of fall/winter visitors, and those traveling for vacation/pleasure accounted for 13 percent.

Trip purpose percentages among fall/winter visitors differ dramatically from summer visitors, among whom 77 percent were traveling for vacation/pleasure; 14 percent were VFRs; and 9 percent were business-related travelers.

Compared to fall/winter 2006-07, visitors in 2011-12 were slightly more likely to be traveling for business (43 compared to 39 percent) and slightly less likely to be VFRs (36 compared to 42 percent). Other shifts were negligible: from 12 to 13 percent vacation/pleasure, and from 7 to 8 percent business/pleasure.

CHART 1.5 - Trip Purpose



Throughout this report, data for "business" travelers represents results for both business and business/ pleasure travelers unless otherwise indicated.

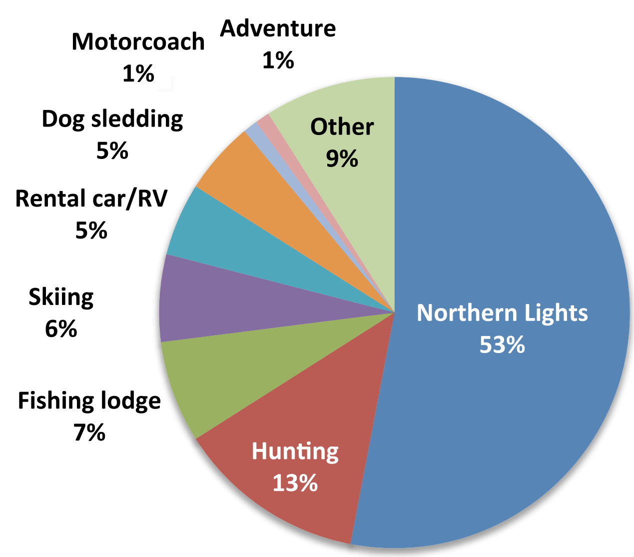
Packages

Only 4 percent of fall/winter visitors purchased multi-day packages (matching the rate of 2006-07). The package purchase rate is much higher among vacation/pleasure visitors (29 percent) than among VFRs (less than 1 percent) or business travelers (1 percent).

The international market was particularly likely to purchase packages at 41 percent, including 84 percent of the Japanese market.

Among those who purchased a package, over half were on Northern Lights viewing packages. Additional package types included hunting (13 percent), fishing lodge (7 percent), skiing (6 percent), rental car/RV (5 percent), and dog sledding (5 percent).

CHART 1.6 – Package Type



Destinations and Length of Stay

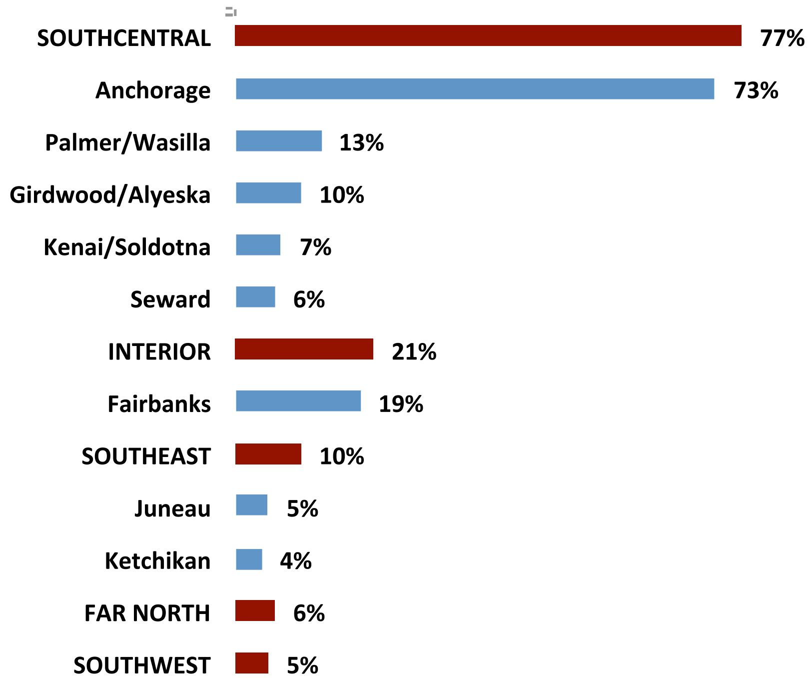
Destinations

Southcentral is by far the most visited region among fall/winter travelers, attracting 77 percent of the market. This compares to 21 percent for the Interior, 10 percent for Southeast, 6 percent for Far North, and 5 percent for Southwest.

Anchorage was the most visited community at 73 percent, followed by Fairbanks (19 percent) and Palmer/Wasilla (13 percent). Vacation/ pleasure visitors were much more likely to visit the Interior and Fairbanks when compared to business travelers and VFRs.

Fall/winter travel patterns differ dramatically from summer, when Southeast is the most visited region, and visitors tend to travel much more widely throughout the state.

CHART 1.7 – Destinations Visited



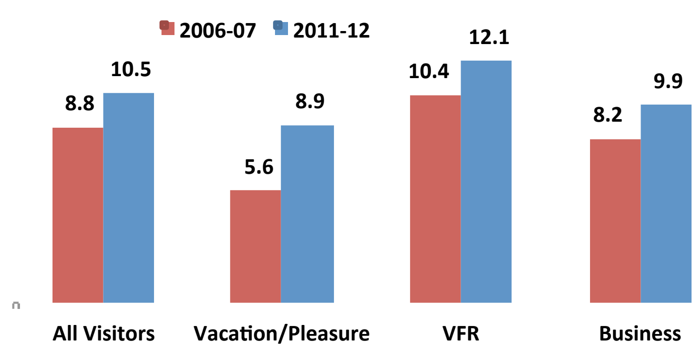
Regional visitation was very similar between 2006-07 and 2011-12, with one exception: visitation to the Interior dropped from 28 to 21 percent (attributable to fewer business travelers and VFRs).

Length of Stay

Fall/winter visitors reported an average length of stay in Alaska of 10.5 nights. 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.

Fall/winter travelers in 2011-12 reported staying in Alaska longer than in 2006-07. The overall average length of stay increased from 8.8 to 10.5 nights. The average increased among all three trip purpose markets: from 5.6 to 8.9 nights among vacation/pleasure visitors, from 10.4 to 12.1 nights among VFRs, and from 8.2 to 9.9 nights among business travelers.

CHART 1.8 – Average Length of Stay by Trip Purpose, 2006-07 and 2011-12 (Number of Nights)

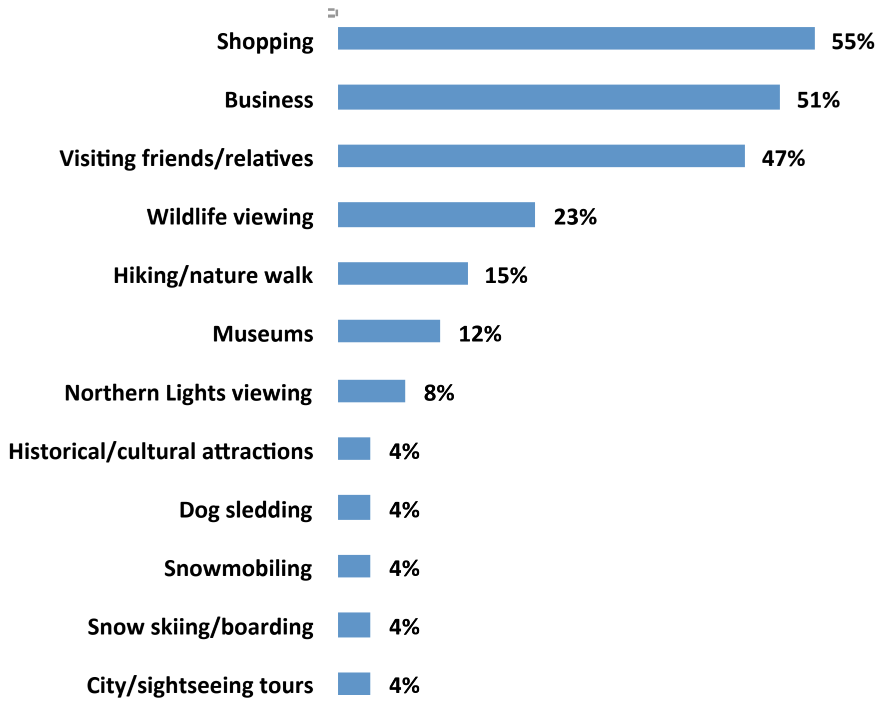


Activities and Satisfaction

Activities

Fall/winter visitors to Alaska tended to participate in three primary activities: shopping (55 percent), business (51 percent), and visiting friends and relatives (47 percent). Nearly one-quarter reported viewing wildlife, 15 percent went on a hike or nature walk, and 12 percent visited a museum. While wintertime activities such as Northern Lights viewing and dog-sledding had lower participation rates among the overall market, vacation/pleasure visitors were much more likely to report these activities. For example, 33 percent of vacation/pleasure visitors participated in Northern Lights viewing, and 22 percent participated in dogsledding.

CHART 1.9 – Most Popular Activities

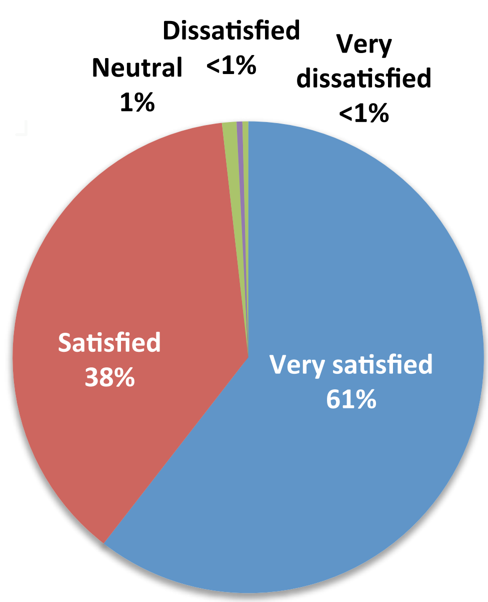


Satisfaction

Virtually all fall/winter visitors (99 percent) expressed satisfaction with their overall Alaska trip, including 61 percent who were very satisfied. Vacation/pleasure visitors reported higher rates at 69 percent very satisfied, compared with 64 percent among VFRs and 56 percent among business travelers. Fall/winter visitors report lower satisfaction rates than summer visitors, among whom 71 percent were very satisfied with their Alaska trip.

Satisfaction increased slightly between 2006-07 and 2011-12, with those very satisfied increasing from 58 to 61 percent. The increase was more pronounced among vacation/pleasure visitors, whose very satisfied rate increased from 60 to 69 percent.

CHART 1.10 – Satisfaction with Overall Alaska Experience



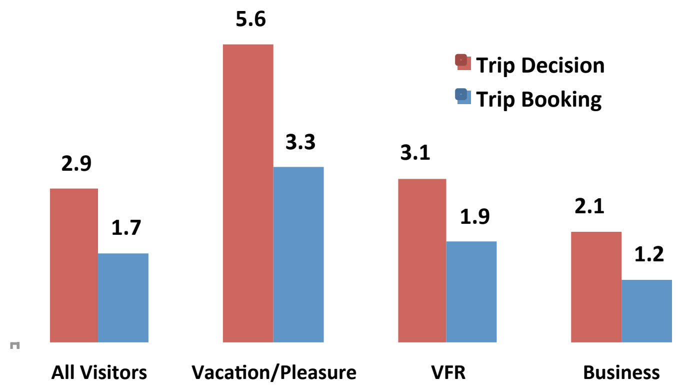
By category, fall/winter visitors were most satisfied with friendliness of residents (66 percent very satisfied), followed by sightseeing (60 percent), tours and activities (58 percent), accommodations and wildlife viewing (both at 50 percent), visitor information services (48 percent), restaurants (42 percent), shopping and value for the money (both at 32 percent), and transportation within Alaska (31 percent).

Trip Planning and Demographics

Trip Planning

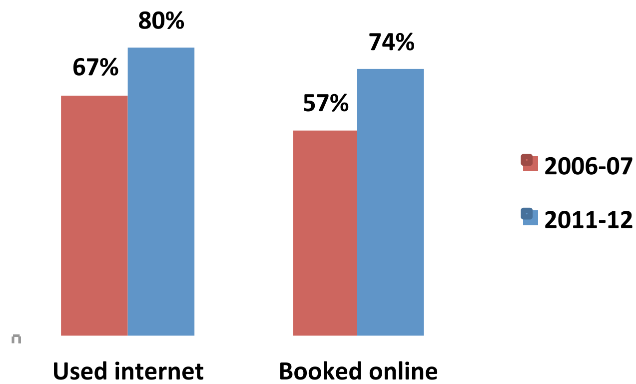
Fall/winter travelers made their decision to take their trip an average of 2.9 months ahead of time, and booked their major travel arrangements an average of 1.7 months ahead of time. Vacation/pleasure visitors reported the highest averages at 5.6 months for their trip decision and 3.3 months for their trip booking. Business travelers reported the lowest at 2.1 months and 1.2 months, respectively.

CHART 1.11 – Average Advance Time for Trip Planning (Number of Months)



Four out of five fall/winter visitors used the internet to plan their Alaska trip, and 74 percent booked at least some portion of their trip online. These rates increased significantly from 2006-07: from 67 to 80 percent for internet usage, and from 57 to 74 percent for online booking. (Summer visitors reported similar increases.) Seventeen percent of fall/winter visitors booked at least some portion of their trip through a travel agent, down from 21 percent in 2006-07.

CHART 1.12 – Internet Usage, 2006-07 and 2011-12



Besides the internet and travel agents, fall/winter visitors primarily relied on prior experience (62 percent) and friends/family (57 percent) as trip planning sources. All other sources were used by 10 percent or fewer.

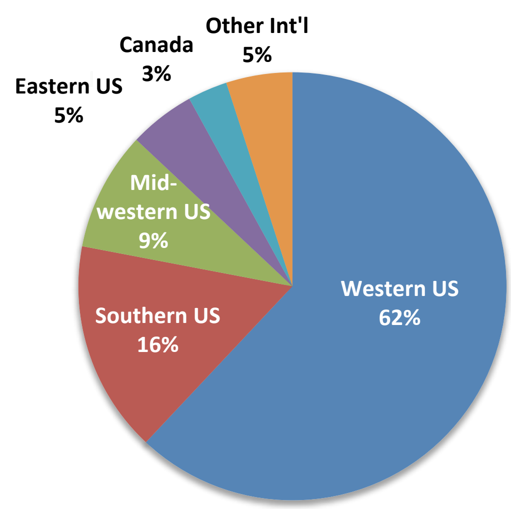
Demographics

Over half of fall/winter visitors (62 percent) came from Western US states (a much higher percentage than in the summer, 36 percent). Other US regions added up to 30 percent. Canadians accounted for 3 percent of visitors, while international visitors accounted for 5 percent.

Fall/winter visitors reported an average party size of 1.4 people. The average age among fall/winter visitors was 48 years, and 57 percent were male.

Visitors reported an average income of $108,000. After adjusting for inflation, this amount represents a 9 percent decrease from 2006-07.

CHART 1.13 – Visitor Origin



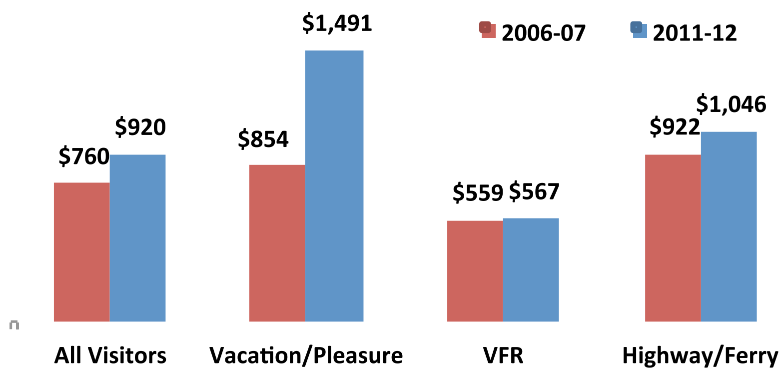
Fall/Winter Expenditures

Fall/winter visitors reported spending an average of $920 on their Alaska trip, not including transportation to enter and exit the state. Vacation/pleasure visitors reported the highest average at $1,491, followed by business travelers at $1,046, and 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.

Per-person, per-trip spending increased from $760 in 2006-07 to $920 in 2011-12. 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. Average spending among vacation/pleasure visitors increased more dramatically (from $854 to $1,491), in part due to longer average length of stay.

CHART 1.14 – Average Per-Person, Per-Trip Spending on Alaska Trip, By Trip Purpose



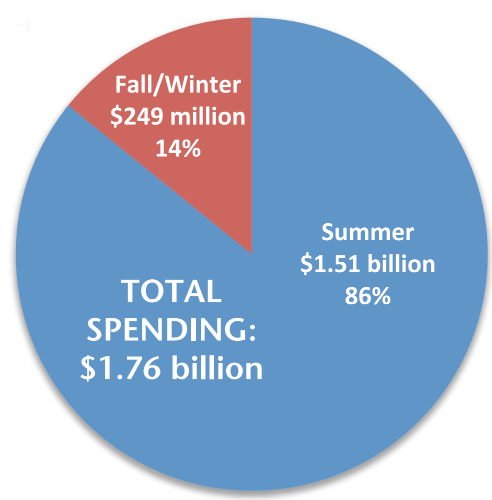
Note: Excludes spending on transportation to enter/exit Alaska.

Full Year Expenditures

Combining results of the Summer 2011 and Fall/Winter 2011-12 study periods, total *annual* expenditures are estimated at $1.76 billion. Cruise packages are not included in these 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.

Total spending increased from $1.71 billion in 2006-07 to $1.76 billion in 2011-12. After adjusting for inflation, total spending actually decreased by 9 percent between the two periods.

CHART 1.15 – Total Visitor Expenditures, Full Year 2011-12



Section II: Introduction

AVSP Overview

The Alaska Visitor Statistics Program is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community, and Economic Development. The study provides the state government and the tourism industry essential information on one of Alaska's major economic engines: out-of-state visitors. Previous AVSP studies were undertaken in 1985/86, 1989/90, 1993/94, 2000/01, and 2006/07. All but the 2000/01 study were completed by McDowell Group. The project consists of two main components: an estimate of visitor volume and a survey of visitors.

Visitor Volume

The Visitor Volume estimate is a count of the number of out-of-state visitors exiting Alaska, by transportation mode, during the study period. The estimate is based on traffic data (for example, highway border crossings, ferry disembarkations, and airport enplanements) and visitor/resident ratios obtained at each exit point. Ratios are applied to the traffic data to arrive at the total visitor volume.

Visitor Survey

The Visitor Survey is administered to a sample of out-of-state visitors departing Alaska at all major exit points. The survey includes questions on trip purpose, transportation modes used, length of stay, destinations, lodging, activities, expenditures, satisfaction, trip planning, and demographics.

The study was undertaken in two stages: Summer 2011 (May 1-September 30) and Fall/Winter 2011-2012 (October 1-April 30). This report addresses the fall/winter period.

Project Team

The AVSP VI project team was led by the McDowell Group, Inc., a research and consulting firm with offices in Juneau and Anchorage. McDowell Group was responsible for a majority of the study tasks: survey design, sample design, surveyor training, survey implementation, traffic data collection, data analysis, and reporting, among others.

McDowell Group contracted web development and data processing functions with two long-term partners:

- Fusion MR is a market research firm based in Portland, Oregon. Fusion MR was responsible for set-up and maintenance of all online versions of the survey, as well as maintenance of the database for completed online and intercept surveys.
- MR Data specializes in data processing of market research and public opinion survey information. MR Data processed all survey data collected for this project and created all cross tabulations using Computer for Marketing Corporation's Mentor package.

Comparison with AVSP V

The AVSP VI methodology followed AVSP V methodology very closely, allowing for a high degree of comparability between the two studies. Trend data can be found in *Section II: Visitor Volume* and *Section IV: Visitor Profile*. Because of the large volume of data presented in *Section V: Summary Profiles*, it was not practical to include 2006-2007 results alongside 2011-2012. To compare data for specific markets, readers are referred to the previous report, available at:

www.commerce.alaska.gov/ded/dev/toubus/research.htm

One important difference for the AVSP VI fall/winter period is the exclusion of surveying of visitors exiting Alaska via highway. Although highway surveys were conducted in 2006-2007, it was determined to be unsafe and statistically inefficient due to the very small number of out-of-state visitors using this mode to exit Alaska during the October to April period. For this reason a limited number of survey results for 2011-2012 are not comparable to those for 2006-2007.

Report Organization

The following section in this report (*Section III: Visitor Volume*) presents the visitor volume estimates. *Section IV: Visitor Profile* presents the results of the visitor survey. Survey results are organized into the following categories:

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

Section V: International Visitors provides survey results based to all international visitors as well as Japanese visitors specifically.

Section VI: Summary Profiles provides additional analysis for 17 subgroups, organized into the following chapters:

Destinations
US Regions
Ferry and Package

Section VII: Methodology presents the methodology used in both the visitor volume estimate and visitor survey.

How to Read the Tables in this Report

Unless otherwise noted, all numerals in the tables displaying survey results are percentages of the sample population noted in the table heading (top row). For example, in the Visitor Profile chapter, the second table shows package purchase rates. Under the heading "Vacation/Pleasure 11-12," in the row "purchased package," the number 29 means that 29 percent of fall/winter 2011-12 vacation/pleasure visitors purchased a package.

Readers are advised that survey responses do not always add up to 100 percent. In some cases this is due to rounding (with responses adding up to either 99 or 101 percent). In other cases respondents were allowed multiple answers, resulting in responses well over 100 percent.

Acknowledgements

The AVSP VI study team would like to acknowledge the following agencies and organizations for their assistance with the project.

Alaska Department of Commerce, Community, and Economic Development
Alaska Travel Industry Association
Ted Stevens Anchorage International Airport
Fairbanks International Airport
Juneau International Airport
Ketchikan International Airport
Sitka Airport
Alaska Airlines
Alaska Marine Highway System
Alaska Marine Highway Ketchikan Terminal
Yukon Department of Tourism and Culture

Section III: Visitor Volume

Introduction

This section presents estimates of the number of out-of-state visitors that came to Alaska between October 1, 2011 and April 30, 2012. The visitor volume phase of the AVSP project involves three major tasks: conducting visitor/resident tallies at exit points, compiling exiting traffic data, and applying the visitor/resident ratios to the traffic data to arrive at visitor volume estimates.

As the table below shows, the 2011-12 phase involved tallying at airports only. Ferry tallies were unnecessary because AMHS provides passenger residency data, and highway tallying was determined to be too unsafe in the fall/winter period, as well as statistically inefficient. Visitor/resident ratios from fall/winter 2006-07 were used to determine highway visitor volume.

TABLE 3.1 - Tally Locations and Volume, AVSP VI – Fall/Winter 2011-12

Mode	Tally Locations	Passengers Tallied
Domestic Air	Anchorage, Fairbanks, Juneau, Ketchikan, Sitka airports	34,381
International Air	Anchorage and Fairbanks airports	3,634
Ferry	None; passenger residency data obtained from AMHS	0
Highway	None; visitor ratios from 2006-07 used	0
	Total Tallied:	**38,015**

The tallies determined visitor/resident ratios for each location, by month. These ratios were applied to monthly traffic data collected from the following sources: Anchorage International Airport, Fairbanks International Airport, Alaska Airlines, and Yukon Department of Tourism and Culture. The Alaska Marine Highway System provided exact passenger counts.

A full description of these tasks is provided in the Methodology section.

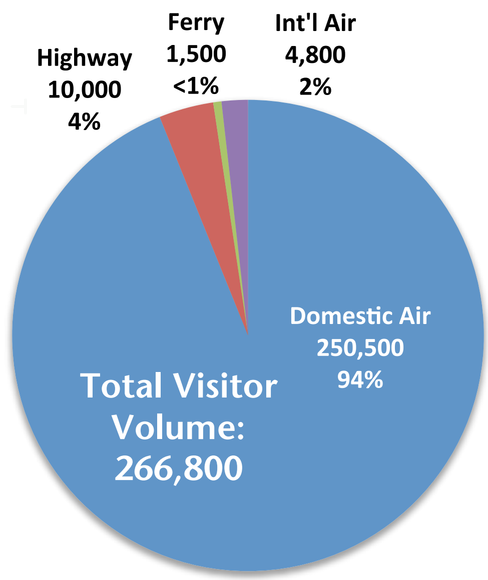
This section is divided into the following chapters:

Alaska Visitor Volume
Visitor Volume, Regions and Communities
Visitor Volume by Origin and Trip Purpose
Alaska Tourism Indicators

Volume by Exit Mode

An estimated 266,800 out-of-state visitors came to Alaska between October 2011 and April 2012. Domestic air is by far the dominant method of transportation used in the fall/winter period: 250,500 (94 percent) exited Alaska using domestic air, 4,800 (2 percent) exited via international air, 10,000 (4 percent) exited via highway, and 1,500 (less than 1 percent) exited via ferry. These figures contrast dramatically with summer visitors, 48 percent of whom exit the state via cruise ship and 46 percent of whom exit via domestic air (according to summer 2011 AVSP estimates).

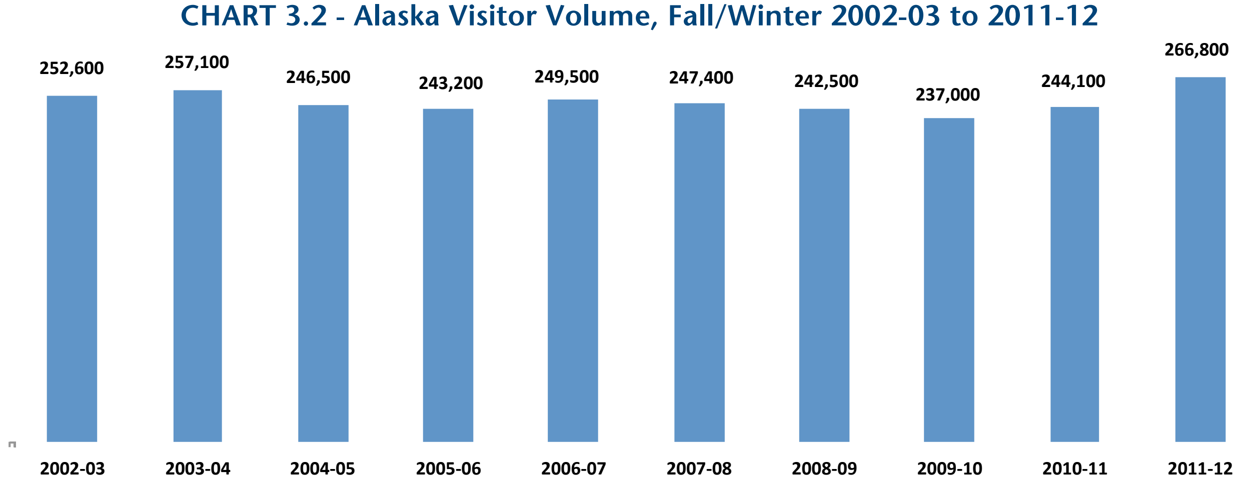
CHART 3.1 – Fall/Winter 2011-12 Alaska Visitor Volume by Exit Mode



Trends

The 2011-12 fall/winter period shows a 9 percent increase over the previous fall/winter of 2010-11, from 244,100 visitors to 266,800. In reality, the increase was likely more modest: exiting traffic (residents and visitors combined) was up by 4 percent. The 2011-12 estimate reflects updated visitor/resident ratios, which show that since the last time ratios were collected (in 2006-07) the percentage of travelers that are out-of-state visitors has increased. Traffic estimates between 2007-08 and 2010-11 were based on 2006-07 ratios. The large increase in 2011-12 likely reflects incremental increases over the last several years as the visitor ratio increased gradually.

CHART 3.2 - Alaska Visitor Volume, Fall/Winter 2002-03 to 2011-12



Sources: 2005-2011 data from AVSP V and VI (conducted by McDowell Group); 2002-2004 data from AVSP IV (conducted by Northern Economics, Inc.).

Visitor/Resident Ratios

The following table shows the percentage of non-residents out of total traffic by each mode in fall/winter 2011-12. Because ratios were applied to traffic data on a monthly and by-location basis, they cannot be applied to overall traffic numbers. Details on how these ratios were collected and applied to traffic data can be found in the Methodology section.

It is important to note that the highway ratio refers to highway travelers who are exiting the state for the final time on their trip. This eliminates the possibility of double-counting visitors who exit the state twice – for example, ferry passengers who exit the state at Beaver Creek, then re-enter at Haines to board a ferry. In addition, the highway ratio below is based on ratios collected in 2006-07; tallies were not conducted in the 2011-12 period.

TABLE 3.2 - Visitor/Resident Ratios, by Mode, Fall/Winter 2011-12

Exit Mode	Percentage Visitors
Domestic Air	32.8%
International Air	99.3%
Highway[1]	24.9%
Ferry	24.9%
Total	**32.8%**

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

Full Year Visitor Volume

The following table shows visitor volume for the 12-month period of May 2011 through April 2012, combining results from the summer and fall/winter study periods. Over 1.8 million out-of-state visitors came to Alaska during the 12-month period, with 85 percent visiting during the five-month summer season. Out of the full-year visitor volume, 53 percent exited by domestic air; 41 percent by cruise ship; 3 percent by highway; 1 percent by international air; and 1 percent by ferry.

TABLE 3.3 - Full Year Visitor Volume, by Exit Mode, 2011-12

	Summer 2011	Fall/Winter 2011-12	Full Year
Domestic Air	723,600	250,500	974,100
Cruise Ship[1]	752,800	0	752,800
Highway	53,500	10,000	63,500
International Air	17,000	4,800	21,800
Ferry	9,900	1,500	11,400
Total	**1,556,800**	**266,800**	**1,823,600**

[1] The total number of cruise ship visitors to Alaska in Summer 2011 was 883,000. See the AVSP Summer 2011 report for further details on summer visitor volume.

The table below shows full-year visitor volume by "transportation market." These figures show the actual volume of cruise ship traffic in relation to other modes, whereas the previous table reflects only those passengers exiting the state via cruise ship. Out of the full-year visitor volume, 48 percent were cruise ship passengers, 47 percent were air visitors (entered and exited the state by air), and 4 percent were highway/ferry visitors (entered or exited the state by highway or ferry).

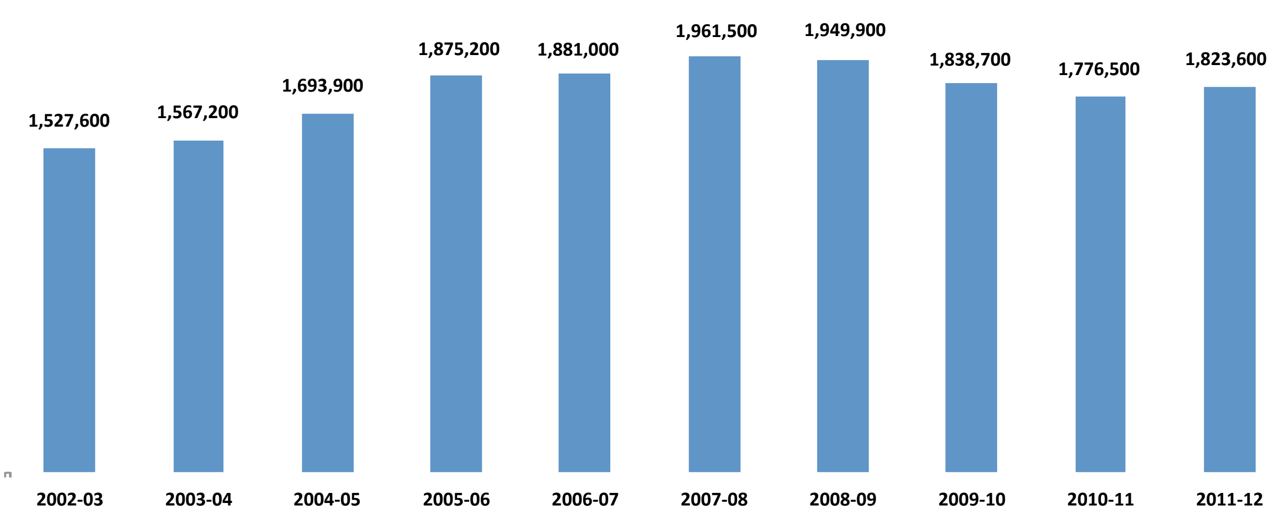
TABLE 3.4 - Full Year Visitor Volume, by Transportation Market, 2011-12

	Summer 2011	Fall/Winter 2011-12	Full Year
Cruise Ship[1]	883,000	0	883,000
Air	604,500	254,700	859,200
Highway/Ferry	69,300	12,100	81,400
Total	**1,556,800**	**266,800**	**1,823,600**

Trends in Full Year Visitor Volume

Alaska visitor volume for 2011-12 (1,823,600) is 7 percent below the peak volume of 1,961,500, in 2007-08; however, it is still 19 percent above the amount of a decade ago (1,527,600). After steadily increasing between 2002 and 2007, the Alaska visitor market plateaued, then declined in response to the nationwide economic crisis and declining cruise traffic. The latest twelve-month period measured (May 2011-April 2012) showed a 3 percent increase in visitor volume compared to 2010-11, the first increase in annual visitation in four years.

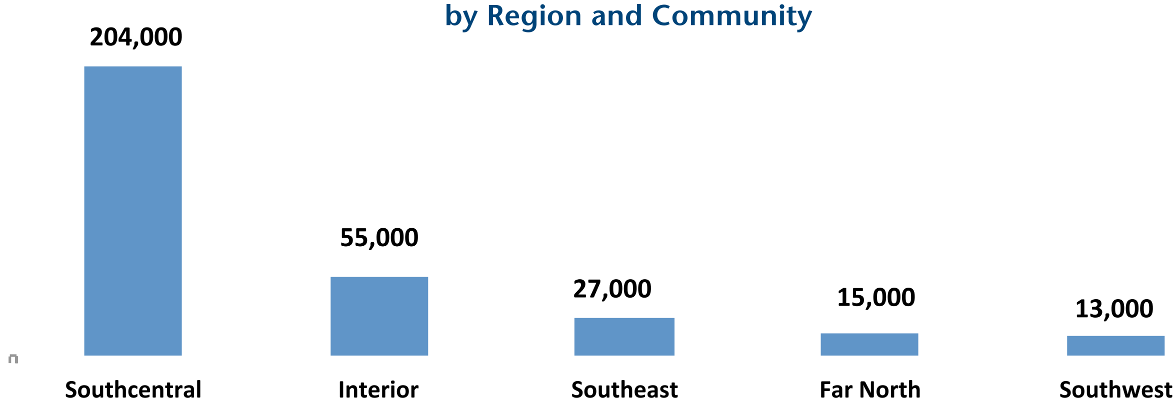
CHART 3.3 - Full Year Alaska Visitor Volume, 2002-03 to 2011-12

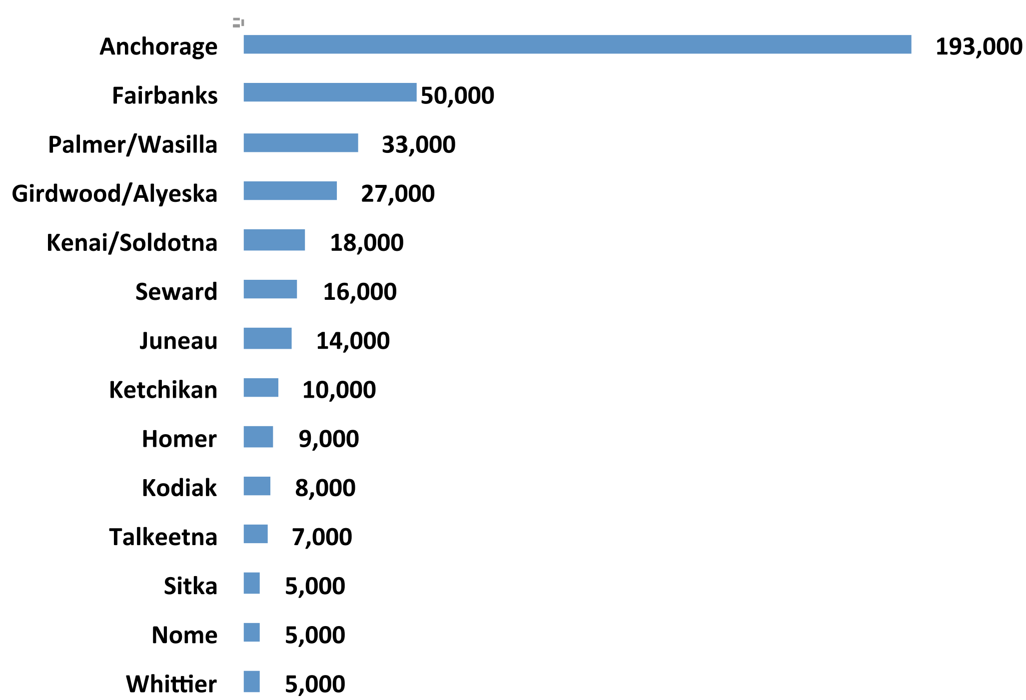


Visitor Volume, Regions and Communities

The chart below shows estimated visitor volume by region and community for fall/winter 2011-12. These figures were derived from applying survey results (percentage of respondents who visited each location, day or overnight) to the total estimated fall/winter visitor volume. Communities with an estimated visitation of less than 5,000 are not included in the volume estimates because their visitation percentage falls outside an acceptable margin of error. Additional details on visitation by region and community can be found in the following Visitor Profile chapter.

CHART 3.4 – Fall/Winter 2011-12 Alaska Visitor Volume (Day or Overnight Visit), by Region and Community





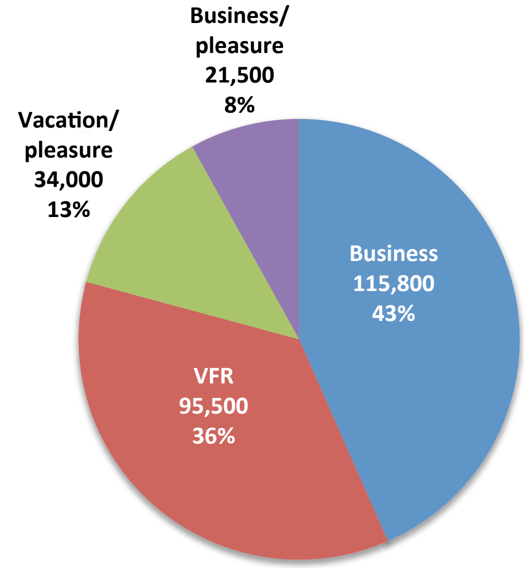
Visitor Volume by Origin and Trip Purpose

Volume by Trip Purpose

Just over half (51 percent; 137,300) of fall/winter visitors were traveling for either business only (43 percent; 115,800) or business/pleasure (8 percent; 21,500). Over one-third (36 percent; 95,500) were traveling to visit friends or relatives. Thirteen percent (34,000) were traveling for vacation/pleasure. These rates differ dramatically from the summer season, when vacation/pleasure visitors make up the majority of travelers (77 percent).

These volumes are based on results of the Visitor Survey. Each visitor was asked for their trip purpose. Additional details on visitors' trip purpose can be found in the Visitor Profile section.

CHART 3.5 – Fall/Winter 2011-12 Visitor Volume, By Trip Purpose

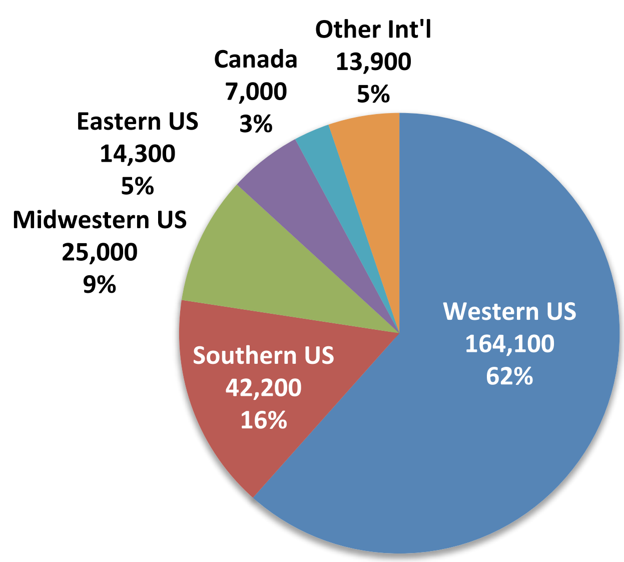


Volume by Region of Origin

Visitors from the Western US represented six out of ten Alaska visitors in fall/winter 2011-12, for a total market size of 164,100. The West was followed by the South, Midwest, and East in terms of market size. Canadians accounted for 7,000 visitors, and other international countries represented 13,900 visitors. Compared to summer visitors, fall/winter visitors are much more likely to be from the West (62 versus 36 percent).

These volumes are based on results of the Visitor Survey. Each visitor was asked what state or country they were visiting from. Additional details on visitors' state and country of origin can be found in the Visitor Profile section.

CHART 3.6 – Fall/Winter 2011-12 Visitor Volume, By Origin



The following section provides additional indicators that help illustrate Alaska's fall/winter visitor market. These indicators refer specifically to the fall/winter season; for a broader view of the Alaska and nationwide visitor industries, please refer to the summer report at the following link:

http://www.commerce.state.ak.us/ded/dev/toubus/research.htm

Select Community Bed Tax Collections

Bed tax collections provide a measure of trends in visitor travel within Alaska. The data is not directly reflective of non-resident visitor volume because it includes Alaska residents; it also reflects room rates, which can fluctuate. However, bed taxes can be a useful indicator of visitor industry traffic, with these limitations in mind.

Anchorage, by far the most common destination of fall/winter travelers, showed an increase of 9.4 percent in bed tax revenues between 2010-11 and 2011-12. Although many in-state residents use Anchorage lodging in the fall/winter season, this increase is likely attributable, at least in part, to the overall increase in visitors to Alaska over the time period. All other municipalities/boroughs queried reported increases including Mat-Su, Juneau, and Sitka. While the City of Fairbanks posted a decrease, the Fairbanks North Star Borough posted a larger increase, for a net increase overall.

TABLE 3.5 – 1st and 4th Quarter Bed Tax Revenue Trends, 2006-2012

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Anchorage	$46,965,950	$48,057,720	$51,975,125	$49,904,001	$52,828,597	$57,812,635
% change		**+2.3%**	**+8.2%**	**-4.0%**	**+5.9%**	**+9.4%**
Fairbanks (City)	$527,064	$490,756	$548,325	$537,339	$589,144	$556,524
% change		**-6.9%**	**+11.7%**	**-2.0%**	**+9.6%**	**-5.5%**
Fairbanks (Bor.)	$423,481	$816,533	$476,173	$465,609	$480,521	$552,218
% change		**+92.8%**	**-41.7%**	**-2.2%**	**+3.2%**	**+14.9%**
Mat-Su	n/a	$645,312	$667,804	$621,819	$578,571	$648,614
% change		**n/a**	**+3.5%**	**-6.9%**	**-7.0%**	**+12.1%**
Sitka	$67,812	$48,170	$43,215	$48,396	$48,017	$49,248
% change		**-29.0%**	**-10.3%**	**+12.0%**	**-0.8%**	**+2.6%**
Juneau	$6,606,093	$7,071,248	$7,265,570	$7,561,341	$7,928,901	$8,207,579
% change		**+7.0%**	**+2.7%**	**+4.1%**	**+4.9%**	**+3.5%**

Sources: Municipality of Anchorage, Fairbanks Convention and Visitors Bureau, Matanuska-Susitna Borough, City and Borough of Sitka, City and Borough of Juneau.

Anchorage RV and Vehicle Tax Collection

Anchorage vehicle rental tax revenues increased significantly in 2011-12, by 12.3 percent over the 2010-11 period. RV rental tax revenues also increased dramatically, although RV rentals are minimal in the fall/winter season. Like bed tax revenues, vehicle and RV rental revenues reflect both resident and visitor usage, as well as variable rental rates.

TABLE 3.6 - Anchorage RV and Car Rental Tax Revenues, 1st and 4th Quarters, 2006-2012

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Vehicle rental revenue	$976,873	$1,041,954	$1,021,791	$982,993	$1,002,462	$1,125,770
% change		**+6.7%**	**-1.9%**	**-3.8%**	**+2.0%**	**+12.3%**
RV rental revenue	$8,922	$6,766	$5,682	$6,480	$10,811	$16,524
% change		**-24.2%**	**-16.0%**	**+14.1%**	**+66.8%**	**+52.8%**

Source: Municipality of Anchorage. Note: Each column reflects the fourth quarter of the first year combined with the first quarter of the second year; for example, the final column refers to October 2011 through March 2012.

Highway Traffic

The table below shows the number of personal vehicle occupants (visitors and residents combined) crossing the border from Alaska into Canada between October and April from 2006-07 to 2011-12, by the three highways. (Top of the World highway is closed October to April.) Personal vehicle traffic has fluctuated widely over the last six years, including a 13 percent decrease in 2008-09 followed by a 27 percent increase in 2009-10. The latest period of 2011-12 saw a 6 percent decrease, with all three highway locations reporting fewer crossings.

TABLE 3.7 – Highway Border Crossings by Personal Vehicle (Visitors and Residents Combined), 2006-2012

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
All highways	36,148	33,641	29,412	37,233	34,440	32,394
% change		**-7%**	**-13%**	**+27%**	**-8%**	**-6%**
Alcan	17,911	14,853	12,911	17,528	14,866	13,708
% change		**-17%**	**-13%**	**+36%**	**-15%**	**-8%**
Klondike	9,538	9,609	8,989	12,117	12,349	11,640
% change		**1%**	**-6%**	**+35%**	**+2%**	**-6%**
Haines	8,699	9,179	7,512	7,588	7,225	7,046
% change		**6%**	**-18%**	**+1%**	**-5%**	**-2%**

Note: Top of the World highway is closed between October and April.
Source: Yukon Department of Tourism and Culture.

Alaska Marine Highway System Ridership

The table below shows the total number of out-of-state visitors who rode the Alaska Marine Highway System during the fall-winter period, for each of the last six years. Ridership includes visitors departing the state as well as those using the AMHS to travel within the state while on their Alaska trip.

Over 13,000 non-Alaska residents rode the AMHS between October 2011 and April 2012. Non-resident ridership on the AMHS increased by 10 percent in 2011-12 after several years of relatively flat traffic. (Interestingly, non-residents exiting the state via ferry increased by only 2 percent over the same time period.)

TABLE 3.8 - Alaska Marine Highway System, Non-Resident Ridership October-April 2006-2012

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Non-resident passengers	12,285	12,083	12,642	12,223	12,234	13,393
% change		**-1.6%**	**+4.6%**	**-3.3%**	**+0.1%**	**+9.5%**

Source: AVSP V and VI, Alaska Marine Highway System.

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

The data in this section is presented for the entire visitor market ("All Visitors") as well as by "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	±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.

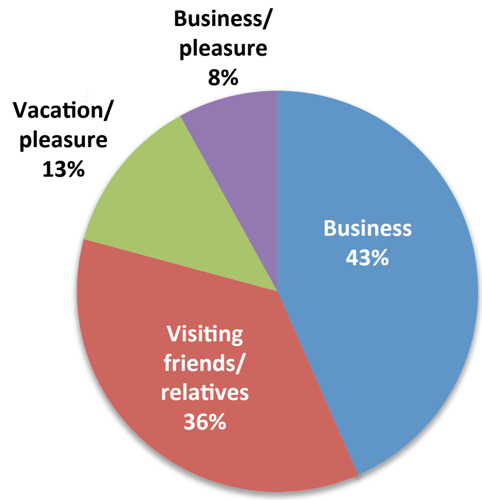
[1] Most survey responses are more accurate than maximum error factors suggest, due to the nature of response distribution in sampling statistics.

Trip Purpose

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

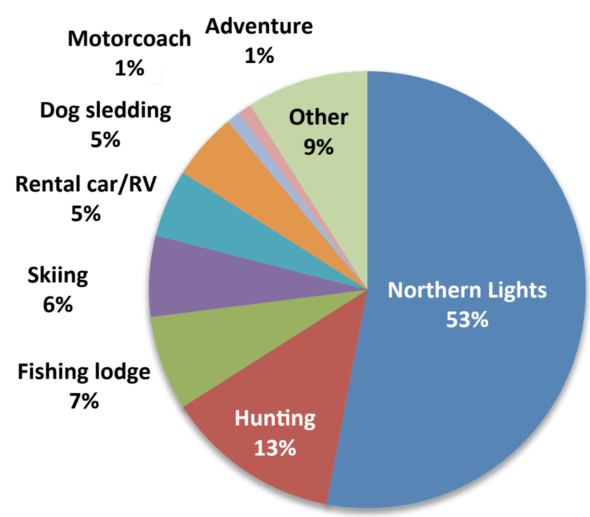


TABLE 4.4 – Package Type, By Trip Purpose, 2011-12 (%)
Base: Purchased Package

	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	91
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

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)

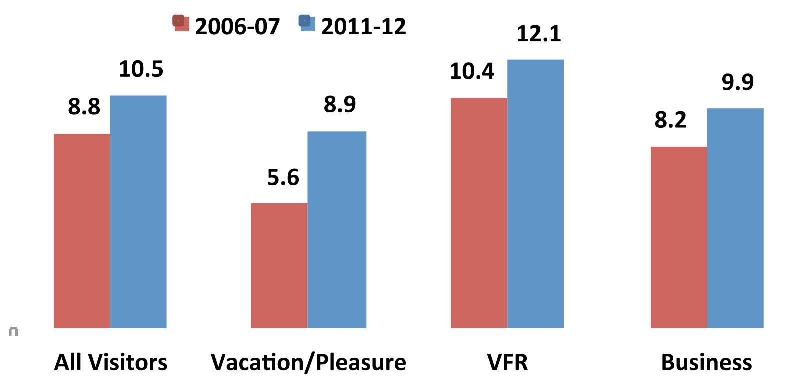


TABLE 4.7 - Length of Stay in Alaska, By Trip Purpose, 2006-07 and 2011-12 (%)

	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

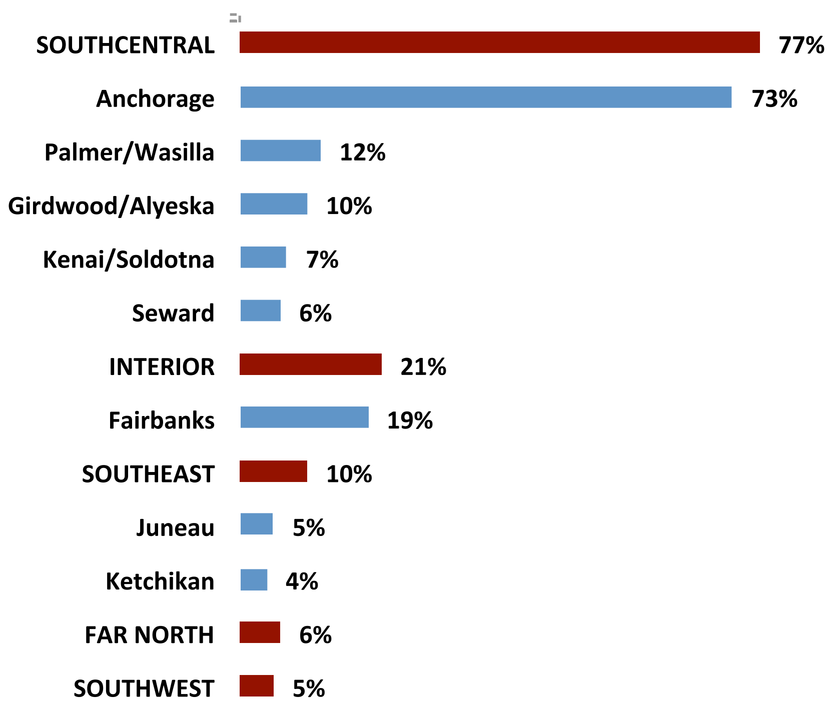


TABLE 4.9 - Destinations Visited (Day or Overnight), By Trip Purpose, 2006-07 and 2011-12 (%)

	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.

Activities

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

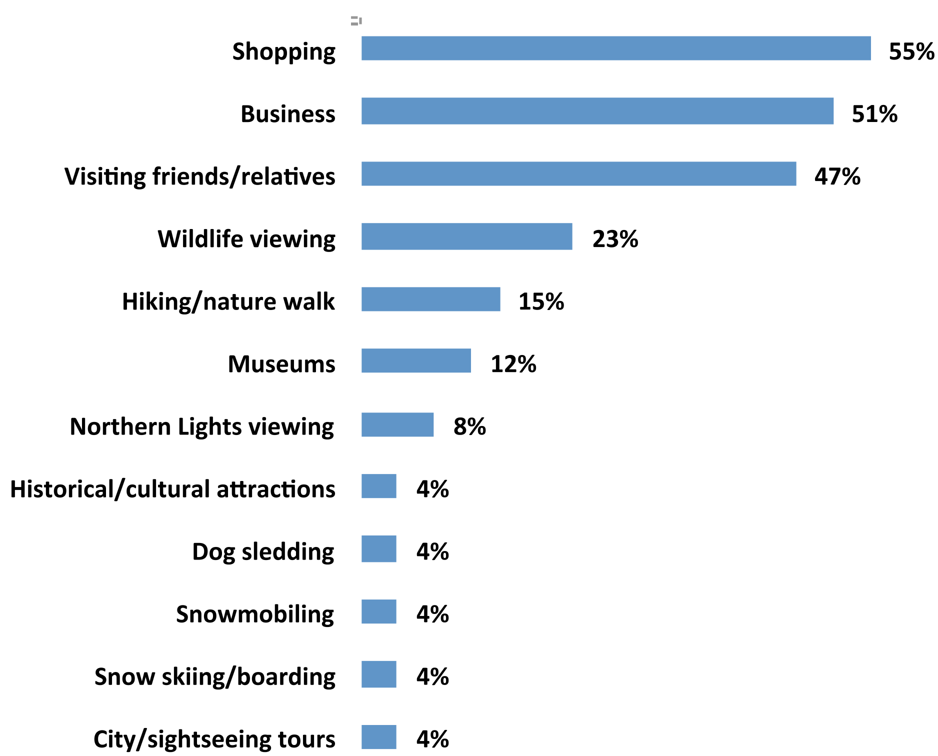


TABLE 4.12 - Activity Participation, By Trip Purpose, 2006-07 and 2011-12 (%)

	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

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

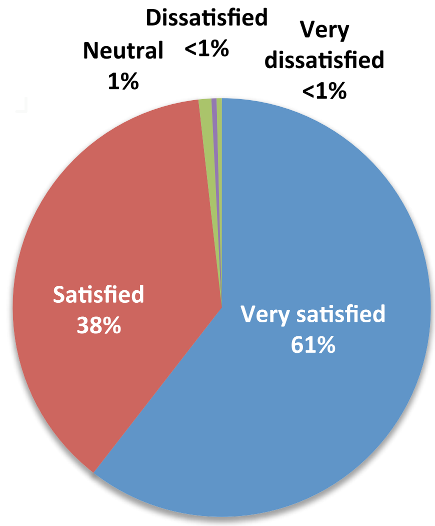


TABLE 4.15 - Satisfaction with Overall Alaska Experience By Trip Purpose, 2006-07 and 2011-12 (%)

	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, 2006-20007 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

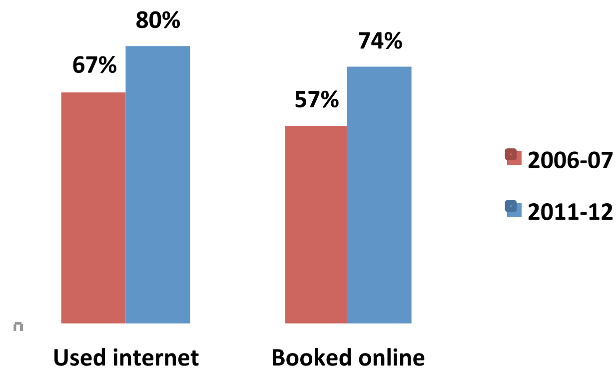


TABLE 4.25 - Internet Usage By Trip Purpose, 2006-07 and 2011-12 (%)

	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 (%)

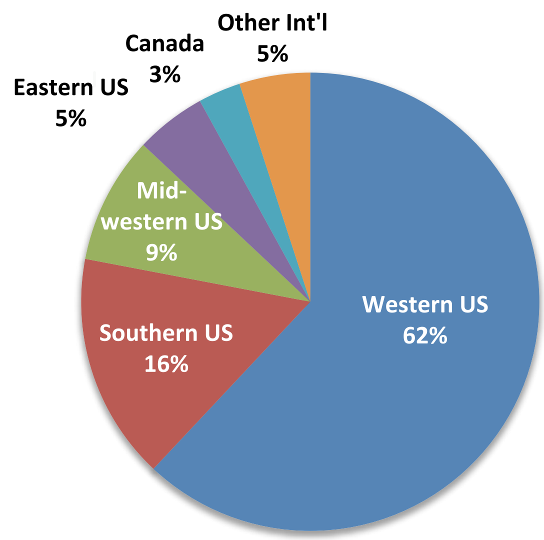
	All Visitors		Vacation/ Pleasure		Visiting Friends/Rel.		Business Bus./Pleasure	
	06-07	11-12	06-07	11-12	06-07	11-12	06-07	11-12
Prior experience	64	62	41	41	73	70	62	62
Friends/family	47	57	34	50	83	76	17	45
Brochures (net)	7	10	11	17	5	6	8	10
Community brochures	2	1	2	2	1	1	3	1
Ferry brochure/schedule	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.

CHART 4.8 – Visitor Origin



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.

Section V: International Visitors

Introduction

This section presents survey results for international visitors as well as Japanese visitors (the only international market with a sufficient sample size for analysis). The following table shows each market's sample size and maximum margin of error.

As the table below shows, Japanese respondents represent the majority of international respondents in terms of sample size (129 out of 169). However, once the survey data is weighted by visitor volume, Japanese visitors only represent 40 percent of the international market. The over-sampling of Japanese visitors occurred because nearly all international air flights were Japan Air flights, and a minimum of 125 surveys was required to provide a sufficient sample size for the international air mode.

Because surveys of visitors who exited by international air are weighted down during data processing, Japanese visitors are not over-represented in either the international market or the overall visitors market data.

TABLE 5.1 – International Market Sample Sizes

Market	Sample Size	Maximum Margin of Error
Total international visitors (other than Canada)	169	±7.5%
Japanese visitors	129	8.5

International visitors represented 5.2 percent of all fall/winter visitors, for an overall estimated volume of 13,900 (out of 266,800 total fall/winter visitors).

Japanese visitors represented an estimated 5,600 visitors, based on survey results showing that 40 percent of international visitors are Japanese. This figure is corroborated by Anchorage and Fairbanks airport data, which shows that 4,632 passengers exited Alaska via Japan Air during the fall/winter period. With survey data showing that 13 percent of Japanese visitors exited Alaska via domestic air, the figure of 5,600 is a reasonable estimate.

TABLE 5.2 – International Market Volume

Market	Estimated Volume
Total international visitors (other than Canada)	13,900
Japanese visitors	5,600

The table below shows all international countries mentioned by survey respondents. Small sample sizes prevent estimating market sizes in terms of overall volume.

TABLE 5.3 - Additional International Countries with Number of Survey Responses

EUROPE (24)	**ASIA (135)**
United Kingdom (5)	Japan (129)
Germany (5)	Taiwan (4)
Italy (3)	China (1)
Norway (2)	Korea (1)
France (2)	
Switzerland (1)	Australia (6)
Austria (1)	
Belgium (1)	**LATIN AMERICA (4)**
Denmark (1)	Brazil (2)
Russia (1)	Mexico (1)
Poland (1)	Peru (1)
Czech Republic (1)	

Trip Purpose and Packages

Trip Purpose

The most frequently cited trip purpose for international visitors was vacation/pleasure, at 62 percent of total international visitors and 91 percent of the Japanese market. Among total fall/winter visitors, those traveling for vacation/pleasure were just 13 percent.

Among international visitors, those traveling to visit friends and relatives (VFRs) and those traveling for business (17 percent and 16 percent, respectively) were much higher than the Japanese international market alone (2 percent and 6 percent, respectively).

TABLE 5.4 - Trip Purpose, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Business only	43	16	6
Visiting friends/relatives	36	17	2
Vacation/pleasure	13	62	91
Business and pleasure	8	4	1

Packages

Two out of five international visitors, including four out of five Japanese visitors, purchased a multi-day travel package, compared to only 4 percent of the total fall/winter visitor market. This is attributable to the much higher rate of vacation/pleasure travelers in the international market.

TABLE 5.5- Purchase of Multi-Day Packages, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Purchased package	4	41	84
Did not purchase package	96	58	13
Don't know	<1	1	2

Northern Lights packages accounted for virtually all packages purchased by international visitors. Among the total fall/winter package market, about half purchased Northern Lights packages. (The "other" category includes skiing and boating packages.)

TABLE 5.6 – Package Type, International Visitors, 2011-12 (%)
Base: Package Visitors

	All Visitors	Int'l Visitors	Japanese
Northern lights package	53	94	100
Hunting package	13	-	-
Fishing lodge package	7	-	-
Skiing package	6	2	-
Dog sledding package	5	2	-
Rental car/RV package	5	-	-
Motorcoach tour	1	-	-
Adventure tour	1	-	-
Other	9	2	-

Virtually all packages purchased included lodging. Meals were included in eight out of ten packages among international visitors and nine out of ten Japanese visitors. Both the total international market and the Japanese market were equally as likely to have tours included in their package (91 percent each).

TABLE 5.7 – Portions of Trip Included in Package, International Visitors, 2011-12 (%)
Base: Package Visitors

	All Visitors	Int'l Visitors	Japanese
Lodging	99	99	98
Meals	74	80	93
Tours	64	91	91
Air	58	60	71
Bus/motorcoach	50	82	85
Railroad	11	19	23
Fishing	11	-	-
Vehicle/RV rental	9	1	1
Other	23	2	1

Modes of Transportation

The following table shows how visitors entered and exited the state and the mode of transportation used to travel within the state. Virtually all fall/winter international visitors entered and exited Alaska by air.

Highway was not a sampled exit mode in 2011-12; therefore it is not included below under "Used to exit Alaska." According to traffic estimates, 4 percent of all visitors exited Alaska via highway in fall/winter 2011-12. The percentage of international visitors who exited via highway is not known.

International visitors that traveled to more than one community used a variety of transportation modes including rental vehicles (19 percent), airplanes (18 percent), personal vehicles (13 percent), and train (12 percent). The Japanese market was more likely to travel via motorcoach/bus and train, where 20 percent and 19 percent, respectively, reported using these modes of transportation.

TABLE 5.8 - Transportation Modes, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Used to enter Alaska			
Air	98	97	100
Highway	1	-	-
Ferry	1	1	-
Other	<1	2	-
Used to exit Alaska			
Domestic air	97	63	13
International air	2	36	87
Ferry	1	<1	-
Used to Travel Between Communities			
Personal vehicle	17	13	-
Air	16	18	8
Rental vehicle	14	19	-
State ferry	1	2	-
Motorcoach/bus	1	8	20
Train	1	12	19
Rental RV	<1	-	-
Personal RV	<1	<1	-
Don't know/refused	1	-	-

Notes: "Other" methods of entering Alaska included private boats. The survey did not ask visitors to differentiate between domestic and international air for entry mode. Highway was not a sampled exit mode; therefore it is not listed under "Used to exit Alaska."

Length of Stay, Destinations, and Lodging

Length of Stay

International visitors reported an average length of stay in Alaska of 11.2 nights, slightly longer than that of the total fall/winter visitor market which reported 10.5 nights. The Japanese international market, however, reported a significantly shorter average length of stay in Alaska of 4.9 nights. The most common trip length for both total international visitors and Japanese visitors was four to seven nights, accounting for 55 percent and 89 percent of those markets, respectively.

TABLE 5.9 - Length of Stay in Alaska, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Three nights or less	25	7	6
Four to seven nights	37	55	89
Eight to 14 nights	21	20	2
15 to 21 nights	7	5	2
22 or more nights	10	13	-
Average number of nights	**10.5**	**11.2**	**4.9**

Lodging

International fall/winter visitors were most likely to have stayed in hotels/motels (64 percent), lodges (21 percent), and private homes (19 percent) while visiting Alaska. Nine out of ten Japanese visitors reported staying in hotel/motels and 40 percent stayed in lodges. Compared to the overall fall/winter market, international visitors were more likely to stay in lodges, and less likely to stay in private homes.

TABLE 5.10 - Lodging Types Used, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Hotel/motel	56	64	89
Private home	41	19	-
Lodge	3	21	40
B&B	2	6	-
Wilderness camping	1	2	-
Campground/RV	1	3	-
Other[1]	9	14	2

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

Destinations

Tables in the following pages show where international visitors went in Alaska, overall (day visits and overnights combined) and overnight.

While Southcentral is the primary destination for the total fall/winter visitor market (drawing 77 percent of visitors), the Interior was more likely to attract international visitors, drawing two-thirds of the total international market and 100 percent of the Japanese international market. Southcentral was visited by 57 percent of all international visitors and 22 percent of Japanese visitors. The next most visited region was the Far North at 6 percent of the total international market and 5 percent of the Japanese market. The Southeast and Southwest regions were less likely to draw international visitors at 3 percent and 2 percent, respectively, while no Japanese visitors reported traveling to these regions.

Fairbanks was the most-visited community among fall/winter international visitors, attracting 64 percent of the total international market and 100 percent of the Japanese market. (Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.) Anchorage was the next most-visited community at 55 percent of total international visitors and 22 percent of Japanese visitors. While the Japanese market seldom reported visiting other communities, the international market as a whole reported visiting Palmer/Wasilla (13 percent), Seward (12 percent), and Denali (10 percent). Overnight visits to regions and communities were similar to overall visitation.

TABLE 5.11 - Destinations Visited (Day or Overnight) International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Southcentral	**77**	**57**	**22**
Anchorage	73	55	22
Kenai Peninsula	13	12	-
Kenai/Soldotna	7	3	-
Seward	6	12	-
Homer	3	3	-
Other Kenai Peninsula	1	1	-
Palmer/Wasilla	13	13	-
Girdwood/Alyeska	10	7	-
Portage	3	2	-
Talkeetna	3	9	-
Whittier	2	3	-
Valdez	1	3	-
Prince William Sound	<1	-	-
Other Southcentral	3	4	-
Interior	**21**	**65**	**100**
Fairbanks	19	64	100
Denali	2	10	1
Glennallen	1	1	-
Tok	1	-	-
Other Interior	3	4	1
Southeast	**10**	**3**	**-**
Juneau	5	2	-
Ketchikan	4	1	-
Sitka	2	1	-
Haines	1	1	-
Prince of Wales Island	1	-	-
Skagway	<1	<1	-
Wrangell	<1	1	-
Petersburg	<1	-	-
Glacier Bay/Gustavus	<1	-	-
Hoonah/Icy Strait Point	<1	-	-
Other Southeast	<1	-	-
Far North	**6**	**6**	**5**
Nome	2	2	-
Other Far North	4	4	5
Southwest	**5**	**2**	**-**
Kodiak	3	-	-
Other Southwest	2	2	-

Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.

TABLE 5.12 - Overnight Destinations, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Southcentral	**73**	**53**	**22**
Anchorage	63	44	22
Kenai Peninsula	8	7	-
Kenai/Soldotna	5	2	-
Seward	2	5	-
Homer	1	<1	-
Other Kenai Peninsula	1	1	-
Palmer/Wasilla	6	8	-
Girdwood/Alyeska	2	4	-
Valdez	1	3	-
Talkeetna	1	2	-
Whittier	<1	-	-
Other Southcentral	2	4	-
Interior	**20**	**65**	**100**
Fairbanks	18	63	100
Denali	1	4	-
Glennallen	1	1	-
Tok	1	-	-
Other Interior	2	2	-
Southeast	**10**	**3**	**-**
Juneau	4	2	-
Ketchikan	3	1	-
Sitka	2	-	-
Haines	1	1	-
Prince of Wales Island	1	-	-
Skagway	<1	<1	-
Wrangell	<1	1	-
Petersburg	<1	-	-
Hoonah/Icy Strait Point	<1	-	-
Glacier Bay/Gustavus	<1	-	-
Other Southeast	<1	-	-
Far North	**5**	**4**	**-**
Nome	2	2	-
Other Far North	3	2	-
Southwest	**5**	**2**	**-**
Kodiak	3	-	-
Other Southwest	2	2	-

Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.

Activities

Shopping was the most frequently cited activity by the total international market and by the Japanese market at 80 percent for each, compared to 55 percent of the total fall/winter visitor market. Cultural activities, specifically museum visits, were also popular with over half of international visitors (59 percent) participating in this activity, including 76 percent of Japanese visitors. The third most-popular activity was Northern Lights viewing, accounting for 54 percent of total international visitors and 84 percent of the Japanese market.

Participation rates in a number of activities were high among international visitors, particularly those of Japanese origin, likely due to the high rate of those traveling for the primary purpose of vacation/pleasure. Other popular activities among international visitors were wildlife viewing (39 percent), dog sledding (37 percent), visiting Chena Hot Springs (35 percent), city/sightseeing tours (24 percent), visiting friends and relatives (21 percent), business (20 percent), and hiking/nature walking (17 percent).

The Japanese market was more likely than the overall international visitor market to participate in many touristic activities but less likely to participate in business (6 percent) and visiting friends and relatives (2 percent). Popular activities reported by Japanese visitors were visiting Chena Hot Springs (69 percent), dog sledding (62 percent), city/sightseeing tours (46 percent), flightseeing (22 percent), wildlife viewing (19 percent), and the Alaska Railroad (16 percent).

Participation in other winter activities such as snow skiing/boarding and snowmobiling among international visitors was somewhat low compared to other activities at 8 percent for each activity.

TABLE 5.13 - Activity Participation, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Shopping	55	80	80
Business	51	20	6
Visiting friend/relatives	47	21	2
Wildlife viewing	23	39	19
Birdwatching	3	3	1
Cultural activities	17	59	76
Museums	12	53	76
Historical/cultural attractions	4	9	1
Native cultural tours/ activities	3	5	1
Gold panning/mine tour	<1	2	-
Hiking/nature walk	15	17	3
Northern Lights viewing	8	54	84
City/sightseeing tours	4	24	46
Dog sledding	4	37	62
Snow skiing/boarding	4	8	2
Snowmobiling	4	8	4
Fishing	3	5	3
Unguided fishing	2	3	-
Guided fishing	1	2	3
Chena Hot Springs	3	35	69
Shows/Alaska entertainment	3	4	-
Flightseeing	2	9	22
Day cruises	2	2	1
Hunting	2	3	-
ATV/4-wheeling	2	2	-
Tramway/gondola	1	<1	-
Camping	1	5	-
Alaska Railroad	1	11	16
Biking	1	<1	-
Kayaking/canoeing	<1	1	-
Zip-line	<1	-	-
Other	9	40	71

Compared to Expectations

When asked how well their Alaska trip had lived up to their expectations, three-quarters of both total international visitors (76 percent) and Japanese visitors (73 percent) said it was either higher or much higher than expectations. One out of five said it was about what they expected. Those citing their trip was below expectations accounted for 4 percent of total international visitors and 10 percent of Japanese visitors, while none said it was far below expectations. International visitors were more likely than the overall visitor market to rate their trip "much higher" than expectations.

TABLE 5.14 - Alaska Trip Compared to Expectations, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Much higher than expectations	21	31	40
4 - Higher than expectations	28	45	33
3 - About what you expected	49	20	18
2 - Below expectations	2	4	10
1 - Far below expectations	<1	-	-
Average 1-5	**3.7**	**4.0**	**4.0**

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

Value for the Money

When asked how Alaska compared to other destinations in terms of value for the money, the most common answer (chosen by 42 percent of total international visitors and 49 percent of Japanese visitors) was "about the same." The overall international market was more likely than the Japanese market to rate value for the money as much worse (8 percent vs. 1 percent).

TABLE 5.15 - Value for the Money
Compared with other vacation destinations visited in the past five years
International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Much better	13	11	8
4 - Better	21	29	34
3 - About the same	46	42	49
2 - Worse	18	9	9
1 - Much worse	2	8	1
Average 1-5	**3.3**	**3.3**	**3.4**

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

Satisfaction with Overall Experience

Fall/winter international visitors were generally satisfied with their overall Alaska experience, with 58 percent of total international visitors and 57 of Japanese visitors very satisfied. Additionally, another one-third of each group was satisfied (37 percent and 36 percent, respectively). Three percent of international visitors were dissatisfied or very dissatisfied. Just 1 percent of Japanese visitors were dissatisfied and none reported feeling very dissatisfied. International visitors gave similar ratings of their overall experience as the total fall/winter visitor market.

TABLE 5.16 - Satisfaction with Overall Alaska Experience
International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Very satisfied	61	58	57
4 - Satisfied	38	37	36
3 - Neither/neutral	1	3	6
2 - Dissatisfied	<1	1	1
1 - Very dissatisfied	<1	2	-
Average 1-5	**4.6**	**4.5**	**4.5**

Satisfaction by Category

Categories with the highest number of very satisfied ratings among total international visitors include: friendliness of residents (73 percent very satisfied), sightseeing (57 percent), and tours and activities (50 percent). Japanese visitors were somewhat less likely to be very satisfied with various aspects of their trip. Restaurants received the lowest very satisfied ratings among total international visitors (18 percent), while shopping received the lowest very satisfied ratings among Japanese visitors (9 percent).

Dissatisfaction ranged from 0 to 16 percent for international visitors. Value for the money received the lowest ratings (16 percent dissatisfied).

Compared to the overall fall/winter market, international visitors gave fewer very satisfied ratings in several categories, including tours/activities (50 versus 58 percent), accommodations (38 versus 50 percent), wildlife viewing (43 versus 50 percent), and restaurants (18 versus 42 percent).

TABLE 5.17 - Satisfaction Ratings by Category: % "Very Satisfied" International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Friendliness of residents	66	73	54
Sightseeing	60	57	43
Tours and activities	58	50	52
Accommodations	50	38	22
Wildlife viewing	50	43	30
Visitor information services	48	42	17
Restaurants	42	18	12
Shopping	32	29	9
Value for the money	32	34	22
Transportation within Alaska	31	29	25

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

TABLE 5.18 - Satisfaction Ratings by Category International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Overall experience in Alaska			
5 - Very satisfied	61	58	57
4 - Satisfied	38	37	36
3 - Neither/neutral	1	3	6
2 - Dissatisfied	<1	1	1
1 - Very dissatisfied	<1	2	-
Average 1-5	**4.6**	**4.5**	**4.5**
Accommodations			
5 - Very satisfied	50	38	22
4 - Satisfied	46	41	53
3 - Neither/neutral	4	17	20
2 - Dissatisfied	1	4	5
1 - Very dissatisfied	<1	-	-
Average 1-5	**4.4**	**4.1**	**3.9**
Restaurants			
5 - Very satisfied	42	18	12
4 - Satisfied	50	52	38
3 - Neither/neutral	6	21	38
2 - Dissatisfied	2	7	10
1 - Very dissatisfied	<1	3	1
Average 1-5	**4.3**	**3.8**	**3.5**
Shopping			
5 - Very satisfied	32	29	9
4 - Satisfied	55	40	36
3 - Neither/neutral	9	28	44
2 - Dissatisfied	3	3	7
1 - Very dissatisfied	<1	1	3
Average 1-5	**4.2**	**3.9**	**3.4**
Visitor information services			
5 - Very satisfied	48	42	17
4 - Satisfied	43	37	47
3 - Neither/neutral	7	20	32
2 - Dissatisfied	2	1	2
1 - Very dissatisfied	<1	1	2
Average 1-5	**4.4**	**4.2**	**3.7**
Sightseeing			
5 - Very satisfied	60	57	43
4 - Satisfied	36	32	41
3 - Neither/neutral	3	5	11
2 - Dissatisfied	1	5	4
1 - Very dissatisfied	<1	1	2
Average 1-5	**4.6**	**4.4**	**4.2**

TABLE 5.18 - Satisfaction Ratings by Category (cont'd) International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Tours and activities			
5 - Very satisfied	58	50	52
4 - Satisfied	37	39	34
3 - Neither/neutral	4	10	12
2 - Dissatisfied	<1	<1	1
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.5**	**4.4**	**4.4**
Wildlife viewing			
5 - Very satisfied	50	43	30
4 - Satisfied	41	37	39
3 - Neither/neutral	7	15	23
2 - Dissatisfied	2	4	8
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.4**	**4.2**	**3.9**
Transportation within Alaska			
5 - Very satisfied	31	29	25
4 - Satisfied	59	49	56
3 - Neither/neutral	6	16	16
2 - Dissatisfied	3	6	2
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.2**	**4.0**	**4.0**
Friendliness of residents			
5 - Very satisfied	66	73	54
4 - Satisfied	31	24	39
3 - Neither/neutral	2	3	7
2 - Dissatisfied	1	-	-
1 - Very dissatisfied	<1	-	-
Average 1-5	**4.6**	**4.7**	**4.5**
Value for the money			
5 - Very satisfied	32	34	22
4 - Satisfied	47	29	36
3 - Neither/neutral	14	21	33
2 - Dissatisfied	7	11	9
1 - Very dissatisfied	1	5	-
Average 1-5	**4.0**	**3.8**	**3.7**

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

Recommending Alaska

Nearly two-thirds of both total international visitors (63 percent) and Japanese visitors (62 percent) said they were very likely to recommend Alaska as a vacation destination to their friends and family, while one-third of each group was likely (32 percent and 35 percent, respectively). Five percent of international visitors and 1 percent of Japanese visitors said they were unlikely or very unlikely to recommend Alaska. Likelihood of recommending Alaska was slightly lower among international visitors compared to the overall fall/winter market (63 versus 70 percent).

TABLE 5.19 - Likelihood of Recommending Alaska to Friends/Family International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Very likely	70	63	62
Likely	25	32	35
Unlikely	2	3	1
Very unlikely	<1	2	-
Don't know	2	1	2

Returning to Alaska

Two out of five international visitors and one-quarter of Japanese visitors said they were very likely to return to Alaska in the next five years. Another one-quarter of international visitors and one-third of Japanese visitors said they were likely. International visitors were much less likely than the overall market to say they would return to Alaska (38 versus 76 percent very likely).

TABLE 5.20 - Likelihood of Returning to Alaska in Next Five Years, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Very likely	76	38	25
Likely	17	24	31
Unlikely	3	12	17
Very unlikely	1	17	9
Don't know	2	10	18

Previous Alaska Travel

Three-quarters of fall/winter international visitors were on their first trip to Alaska, in sharp contrast to just one-quarter of total fall/winter visitors. Eight out of ten Japanese visitors were on their first Alaska trip.

TABLE 5.21 - Repeat Alaska Travel, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
First trip to Alaska	26	73	81
Been to Alaska before	74	27	19

Trip Planning Timeline

Fall/winter international visitors decided to come on their trip an average of 6.3 months ahead of time, while Japanese visitors made their travel decision 7.1 months in advance. Booking arrangements were made an average of 2.9 months prior to travel for total international visitors and 3.5 months prior for Japanese visitors. Not surprisingly, advance planning times among international visitors are much longer when compared to the overall fall/winter market.

TABLE 5.22 - Trip Planning Timeline, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
How far in advance did you decide to come on this trip to Alaska?			
Less than one month	39	14	6
One to three months	39	34	33
Four to six months	12	31	40
Seven to 11 months	3	7	6
One year or more	7	13	14
Don't know	<1	1	1
Average # of months	**2.9**	**6.3**	**7.1**
How far in advance did you book your major travel arrangements?			
Less than one month	47	23	8
One to three months	40	44	42
Four to six months	9	25	45
Seven to 11 months	2	6	3
One year or more	1	2	1
Don't know	1	<1	1
Average # of months	**1.7**	**2.9**	**3.5**

The most common time period for both making the decision to travel to Alaska and booking the trip was between August and October 2011. The following period (November 2011 to January 2012) was also frequently cited. International visitors were much less likely than the overall fall/winter market to either make their trip decision or book in the last three months of February to April 2012.

TABLE 5.23 - Trip Planning Timeline by Calendar Month, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Trip Decision – Top Three Periods			
Before Jan 2011	6	12	11
Feb-Apr 2011	4	7	4
May-Jul 2011	7	8	4
Aug-Oct 2011	32	42	51
Nov 2011-Jan 2012	31	22	24
Feb-Apr 2012	21	9	8
Trip Booking – Top Three Periods			
Before Jan 2011	1	4	1
Feb-Apr 2011	2	1	1
May-Jul 2011	5	5	-
Aug-Oct 2011	33	47	56
Nov 2011-Jan 2012	35	29	29
Feb-Apr 2012	24	14	14

Internet Usage

Eight out of ten fall/winter international visitors used the internet to plan their trip, including two-thirds of Japanese visitors. More than half of total international visitors and one-fourth of Japanese visitors booked at least one component of their trip online. International visitors were much less likely to book online compared to the overall market (55 versus 74 percent).

TABLE 5.24 - Internet Usage, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Used Internet	80	80	65
Research only	6	25	41
Research and book	74	55	24
Did not use Internet	17	19	33
Don't know	3	1	2

The most common component booked online among international visitors was airfare, followed by lodging, vehicle rental, overnight packages, and tours. While international visitors were less likely than the overall market to book airfare online, they were more likely to book tours and packages. The sample size of Japanese visitors that booked online was too small for analysis.

TABLE 5.25 - Trip Components Booked over Internet, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors
Airfare	71	43
Lodging	28	23
Vehicle rental	16	13
Tours	2	10
Overnight packages	1	13
Ferry	1	1
Other	<1	3

Note: The sample size of Japanese visitors who booked online was too small for analysis.

Travel Agent Usage

Half of fall/winter international visitors, including three-fourths of Japanese visitors, booked at least one component of their trip through a travel agent, compared to just 17 percent of total fall/winter visitors.

TABLE 5.26 - Travel Agent Usage, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Booked through travel agent	17	49	74
Did not book through travel agent	80	49	23
Don't know	3	1	3

Nearly half of international visitors (44 percent) booked airfare through a travel agent, including 63 percent of Japanese visitors. Over one-quarter booked overnight packages via a travel agent, while 17 percent booked tours, 16 percent booked lodging, and 6 percent booked vehicle rental. Japanese visitors were more likely to book airfare, overnight packages, and tours via a travel agent.

TABLE 5.27 - Trip Components Booked through a Travel Agent International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Airfare	16	44	63
Lodging	10	16	22
Vehicle rental	5	6	1
Overnight packages	2	27	64
Tours	1	17	38
Ferry	<1	-	-
Other	<1	<1	1

Usage of State of Alaska Information Sources

One out of four international visitors (23 percent), including 12 percent of Japanese visitors, had visited the travelalaska.com website. Nine percent of total international visitors had received the Official Alaska State Vacation Planner. Japanese visitors were more likely to have received it (16 percent). Usage of the State website and the Vacation Planner were higher among international visitors then among all fall/winter visitors.

TABLE 5.28 - Usage of State of Alaska Information Sources, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Did you visit the official State of Alaska travel website? (www.travelalaska.com)			
Yes	9	23	12
No	88	74	84
Don't know	2	4	4
Did you receive the Official Alaska State Vacation Planner?			
Yes	4	9	16
No	94	87	80
Don't know	2	4	4

Usage of Additional Information Sources

International visitors were more likely to use a variety of information sources than total fall/winter visitors. The most commonly cited source of information for their trip was friends and family accounting for 39 percent of international respondents. Other popular sources were travel guide/books (24 percent), brochures (23 percent), prior experience (20 percent), hotel/lodge (14 percent), and television (13 percent).

Among Japanese visitors, television was the most commonly cited information source (27 percent), followed by brochures (24 percent), travel guide/book (22 percent), prior experience (14 percent), and friends and family (13 percent).

TABLE 5.29 - Other Information Sources, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Prior experience	62	20	14
Friends/family	57	39	13
Brochures (net)	10	23	24
Community brochures	1	<1	1
Ferry brochure/schedule	1	2	-
Cell phone apps	6	<1	1
Hotel/lodge	6	14	8
Television	5	13	27
Magazine	4	9	9
Travel guide/book	3	24	22
AAA	3	-	-
Newspaper	3	3	8
Milepost	1	<1	-
Club/organization	1	-	-
Convention & Visitors Bureau(s)	1	3	1
Library	1	8	8
North to Alaska guide	1	<1	1
Travel/recreation exhibits	<1	3	6
Cruise line/tour company	<1	-	-
Other	2	3	3
None	10	10	9
Don't know	<1	-	-

Origin

Asian visitors made up half of the fall/winter international market, with four out of ten from Japan. One-third of non-Canadian international visitors were from Europe, including the United Kingdom (9 percent), Germany (6 percent), France (4 percent), and Norway (4 percent).

TABLE 5.30 – Origin, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
International	**5**	**100**	**100**
Asia	**3**	**51**	**100**
Japan	2	40	100
Taiwan	<1	7	-
China	<1	2	-
Korea	<1	2	-
Europe	**2**	**31**	**-**
United Kingdom	<1	9	-
German-speaking Europe (GSE)	<1	7	-
Germany	<1	6	-
France	<1	4	-
Norway	<1	4	-
Belgium	<1	2	-
Denmark	<1	2	-
Italy	<1	2	-
Australia	**<1**	**8**	**-**
Brazil	**<1**	**4**	**-**
Mexico	**<1**	**2**	**-**
Other International	**<1**	**4**	**-**

Party Size

Fall/winter international visitors, as well as the sub-group of Japanese visitors, reported an average party size of 1.6. Party size was defined as those traveling in their immediate party, sharing expenses such as food, lodging, and transportation. International visitors traveling in parties of two were nearly double that of total fall/winter visitors, attributable to the higher rate of business travelers and VFRs among total visitors.

TABLE 5.31 - Party Size, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
One	72	51	47
Two	22	42	49
Three	3	6	4
Four	1	-	-
Five or more	1	2	-
Average party size	**1.4**	**1.6**	**1.6**

A new question in AVSP VI, fall/winter visitors were asked their group size – the number of people they are traveling with but not sharing expenses. Average group size among international visitors was 3.4, while Japanese visitors reported an average group size of 4.6. The most commonly cited group size among both total international visitors and Japanese visitors was two people (38 percent and 46 percent, respectively).

International fall/winter visitors were much more likely to be traveling in groups of three or more than total fall/winter visitors (30 percent vs. 12 percent).

TABLE 5.32 - Group Size, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
One	63	31	25
Two	24	38	46
Three	4	9	11
Four	3	8	8
Five	1	3	1
Six to ten	2	7	-
Eleven or more	2	3	8
Average group size	**2.2**	**3.4**	**4.6**

Age and Gender

Fall/winter international visitors were slightly more likely to be male (55 percent male), while the sub-group of Japanese visitors was slightly more likely to be female (56 percent female). The average age among total international visitors was 46.5 years, while Japanese visitors were somewhat older with an average age of 51.9 years.

TABLE 5.33 - Age and Gender, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Gender			
Male	57	55	44
Female	43	45	56
Age			
Under 18	4	2	2
18 to 24	7	9	5
25 to 34	14	21	16
35 to 44	15	15	13
45 to 54	20	15	7
55 to 64	26	18	30
65 and older	15	19	28
Average age (years)	**47.8**	**46.5**	**51.9**

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

Household Characteristics

Over one-third of total international visitors reported children living in their household (37 percent), though the proportion of Japanese visitors with children in their household was just 20 percent.

TABLE 5.34 - Children Living In Household, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Children living in household	32	37	20
No children in household	68	63	80
Don't know	<1	-	-

One-quarter of total fall/winter international visitors were retired or semi-retired, similar to figures for total fall/winter visitors. Japanese travelers were somewhat more likely to be retired or semi-retired, at 39 percent.

TABLE 5.35 - Retired or Semi-Retired, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Retired or semi-retired	22	25	39
Not retired	78	75	61
Don't know	1	-	-

Nearly two-thirds of fall/winter international visitors (64 percent) had graduated from college, including over half of Japanese visitors (53 percent). International visitors were more likely to hold a Master's/Doctorate degree than the total fall/winter visitor market (35 versus 21 percent).

TABLE 5.36 – Education, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Some high school	1	5	-
High school diploma/GED	12	8	21
Associate/technical degree	9	4	7
Some college	19	17	14
Graduated from college	37	29	49
Master's/Doctorate	21	35	4
Don't know	<1	2	4

Average income of fall/winter international visitors was reported at $88,000, lower than the figure for total fall/winter visitors ($108,000). Japanese visitors reported an annual average income of $75,000. International visitors were more likely to decline this question, perhaps because they were unable to report their income in terms of US dollars.

TABLE 5.37 - Household Income, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Less than $25,000	6	5	7
$25,000 to $50,000	11	21	22
$50,000 to $75,000	15	13	14
$75,000 to $100,000	15	12	9
$100,000 to $125,000	11	6	10
$125,000 to $150,000	10	3	5
$150,000 to $200,000	8	10	3
Over $200,000	10	4	2
Refused	15	27	28
Average income	**$108,000**	**$88,000**	**$75,000**

Expenditures Per Person

International fall/winter visitors reported spending an average of $1,612 per person on their Alaska trip, including $2,075 among Japanese visitors. This compares with $920 among all fall/winter visitors. On a per-night basis, international visitors spent $144 per person, while Japanese visitors spent $423 per person.

**TABLE 5.38 - Visitor Expenditures in Alaska, Per Person, Overall
Excluding Transportation to/from Alaska
International Visitors, 2011-12**

	All Visitors	Int'l Visitors	Japanese
Less than $500	36	9	5
$501 - $1,000	26	22	13
$1,001 - $2,500	17	19	15
$2,501 - $5,000	7	21	22
Over $5,000	3	11	14
Don't know	11	18	32
Average per person, per trip	**$920**	**$1,612**	**$2,075**
Average per person, per night	**$88**	**$144**	**$423**

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

Total Expenditures

International visitors spent an estimated $22 million on Alaska travel in fall/winter 2011-12, $12 million of which is attributable to Japanese visitors. International visitor spending represented 9 percent of total fall/winter spending.

**TABLE 5.39 - Total Visitor Expenditures in Alaska
in Millions of Dollars
International Visitors, 2011-12**

	All Visitors	Int'l Visitors	Japanese
Total in-state spending	$249m	$22m	$12m

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

Section VI: Summary Profiles

Introduction

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
Destination	Anchorage, Fairbanks, Juneau, Ketchikan, Palmer/Wasilla, Sitka, Girdwood, Seward, Kenai/Soldotna, Southwest, Far North
US Regions	Western US, Midwest US, Southern US, Eastern US
Ferry and Package	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
Trip Purpose						
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
Purchased multi-day package						
Yes	4	3	14	5	-	2
Package type						
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
Trip Purpose						
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
Purchased multi-day package						
Yes	5	1	2	-	12	3
Package type						
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
Exit Mode						
Air	99	100	100	96	91	100
Ferry	1	<1	<1	4	9	<1
Used to Travel Between Communities						
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
Exit Mode						
Air	96	100	99	100	100	98
Ferry	4	<1	<1	<1	<1	2
Used to Travel Between Communities						
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
Regions Visited						
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
Destinations Visited, Top 10						
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
Lodging Types Used						
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
Regions Visited						
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
Destinations Visited, Top 10						
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	-
Lodging Types Used						
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	
Compared to expectations												
Much higher	21		19		36		20		12		18	
Higher	28		30		30		27		25		37	
About as expected	49		50		31		51		60		45	
Value for the money, compared to other destinations												
Much better	13		13		16		11		11		17	
Better	21		22		23		19		25		23	
About the same	46		45		44		46		44		35	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
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	
Compared to expectations												
Much higher	32		25		27		19		15		12	
Higher	26		31		54		31		17		31	
About as expected	42		45		20		45		64		57	
Value for the money, compared to other destinations												
Much better	23		10		22		21		9		7	
Better	13		26		14		15		17		22	
About the same	52		48		37		40		54		26	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
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
Previous mode of transportation used to enter/exit Alaska						
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
Previous mode of transportation used to enter/exit Alaska						
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
Trip Decision – Top Three Periods						
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
Trip Booking – Top Three Periods						
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
Internet and Travel Agent Usage						
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
Other Sources – Top 10						
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
Trip Decision – Top Three Periods						
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
Trip Booking – Top Three Periods						
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
Internet and Travel Agent Usage						
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
Other Sources – Top 10						
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
Origin						
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
Other Demographics						
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
Origin						
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
Other Demographics						
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
Trip Purpose					
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
Purchased multi-day package					
Yes	4	1	5	4	3
Package type					
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
Exit Mode					
Air	99	99	99	100	100
Ferry	1	1	1	<1	-
Used to Travel Between Communities					
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
Regions Visited					
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
Destinations Visited, Top 10					
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	-
Lodging Types Used					
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	
Compared to expectations										
Much higher	21		19		10		27		27	
Higher	28		24		37		25		39	
About as expected	49		55		51		47		34	
Value for the money, compared to other destinations										
Much better	13		13		5		18		17	
Better	21		20		23		17		18	
About the same	46		49		48		38		43	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
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
Previous mode of transportation used to enter/exit Alaska					
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
Trip Decision – Top Three Periods					
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
Trip Booking – Top Three Periods					
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
Internet and Travel Agent Usage					
Used Internet	80	80	81	78	82
Booked over Internet	74	76	70	74	74
Booked through travel agent	17	13	22	18	15
Other Sources – Top 10					
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
Trip Purpose			
Business only	43	4	4
Visiting friends/relatives	36	50	1
Vacation/pleasure	13	29	87
Business/pleasure	8	16	8
Purchased multi-day package			
Yes	4	6	100
Package type			
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
Exit Mode			
Air	99	27	99
Ferry	1	73	1
Used to Travel Between Communities			
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
Regions Visited			
Southcentral	77	22	54
Interior	20	5	65
Southeast	10	99	7
Southwest	5	-	14
Far North	6	-	4
Destinations Visited, Top 10			
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	-	-
Lodging Types Used			
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	
Compared to expectations						
Much higher	21		10		40	
Higher	28		18		33	
About as expected	49		71		25	
Value for the money, compared to other destinations						
Much better	13		8		14	
Better	21		31		22	
About the same	46		35		48	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
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
Previous mode of transportation used to enter/exit Alaska			
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
Trip Decision – Top Three Periods			
Aug-Oct 2011	32	19	43
Nov 2011-Jan 2012	31	32	19
Feb-Apr 2012	21	19	6
Trip Booking – Top Three Periods			
Nov 2011-Jan 2012	35	34	24
Aug-Oct 2011	33	19	48
Feb-Apr 2012	24	28	9
Internet and Travel Agent Usage			
Used Internet	80	79	72
Booked over Internet	74	60	51
Booked through travel agent	17	4	43
Other Sources – Top 10			
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
Origin			
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
Other Demographics			
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

AVSP VI – Fall/Winter 2011-12

Section VII: Methodology

Introduction

This chapter contains methodological information that is specific to the fall/winter period. A full description of AVSP methodology (survey locations, surveyor training, traffic data sources, sampling procedure, etc.) can be found in the summer report at the following link:

http://www.commerce.state.ak.us/ded/dev/toubus/research.htm

Visitor Volume

Fall/winter visitor volume was determined in exactly the same manner as summer visitor volume: by applying visitor/resident ratios determined by tally contacts to traffic data.

Time Period

Visitor volume in this report refers to the fall/winter period: October 1, 2011 through April 30, 2012.

Tally Contacts

Tally contacts are made when travelers are asked prior to exiting Alaska whether they are a resident or visitor. McDowell Group surveyors tallied a total of over 38,000 people as they were exiting Alaska during the fall/winter period. Tallies were only conducted for Domestic and International Air. Tallies were not necessary for the ferry exit mode because the Alaska Marine Highway System provides exact counts of non-residents disembarking at Bellingham and Prince Rupert. Tallies were not conducted on the highway because it was not a sampled mode in fall/winter 2011-12. Highway visitor/resident ratios from 2006-07 were used to determine visitor volumes.

Visitor/Resident Tally Contacts, Fall/Winter 2011-12

Exit Mode	Passengers Tallied
Domestic Air	34,381
International Air	3,634
Total	**38,015**

Survey Population

The AVSP Fall/Winter 2011-12 survey was conducted with out-of-state visitors who were exiting Alaska between October 1, 2011 and April 30, 2012. Sampled exit modes were the same as in the summer, with two exceptions. The cruise ship mode was not sampled in fall/winter because over 99 percent of cruise ship passengers exit Alaska during the summer period. The highway mode was not sampled in fall/winter because of surveyor safety concerns, and the statistical and logistical inefficiency of surveying such a small population. (Visitors exiting by highway represent an estimated 3.7 percent of all fall/winter visitors. Roughly half of these visitors exit via commercial vehicle and therefore would not have been eligible to be surveyed.)

Survey Design

The fall/winter survey was based on the summer survey, with several small variations. The wintertime activities of snow skiing/snowboarding, snowmobiling, and Chena Hot Springs were added to the list of activities, and Northern Lights packages and hunting packages were added to the list of packages.

Unlike the summer survey, an online survey methodology was not used for fall/winter. The comparatively low response rate in online surveying coupled with the small number of visitors traveling in the fall/winter, make the online methodology an ineffective survey research tool for the fall/winter season.

Sample Sizes

A total of 1,364 surveys were conducted during the fall/winter period, including 1,170 with visitors exiting via domestic air, 131 with visitors exiting via international air, and 63 with visitors exiting via Alaska Marine Highway.

Sample Sizes, Fall/Winter 2011-12

Exit Mode	Sample Size
Domestic Air	1,170
International Air	131
Ferry	63
Total	**1,364**

Data Weighting

Fall/winter data was weighted using the same methodology as the summer data: by exit mode. Unlike summer data, no weighting of online data was necessary.

Response Rates

Response rates show the percentage of people who completed a survey out of the total number of people targeted. The lower response rate for international air is likely attributable to the fact that nearly all sampled international flights for fall/winter 2011-12 occurred on Japan Air, where there is a higher likelihood of refusals due to cultural and language barriers. Although McDowell Group employed an interpreter to conduct a majority of the Japan Air surveys, non-Japanese speaking surveyors did conduct some of the surveys.

Response Rates, Fall/Winter 2011-12

Exit Mode	Response Rate
Domestic Air	88.2%
International Air	51.6%
Ferry	81.8%
Total	**82.4%**