Alaska Visitor Statistics Program VI

Summer 2011

Conducted by McDowell Group

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

Alaska Visitor Statistics Program VI

Summer 2011

Prepared for:

STATE OF ALASKA

Alaska Department of Commerce, Community, & 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 2011-2012 (October 1-April 30). This report addresses the summer 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 visitor volume estimate was based on visitor/resident tallies of 54,605 travelers exiting Alaska at major exit points. The resulting ratios were applied, by month and by location, to traffic data (highway border crossings and airport enplanements) to arrive at visitor volume estimates. (Tallies of cruise passengers were not conducted because they are assumed to be 100 percent visitors. Tallies of ferry passengers were not conducted because the Alaska Marine Highway provides passenger residency information to the AVSP.)

The visitor survey included 3,563 intercept surveys (in-person interviews) and 3,184 surveys completed online, for a total of 6,747 surveys. Visitors were surveyed at all major exit points: airports, highways, cruise ship docks, and ferries. To obtain the online sample, "invitation cards" were distributed to visitors during intercept sample periods, inviting them to participate in the web-based survey. The response rate for the intercept survey was 85 percent; for the online survey, 10 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

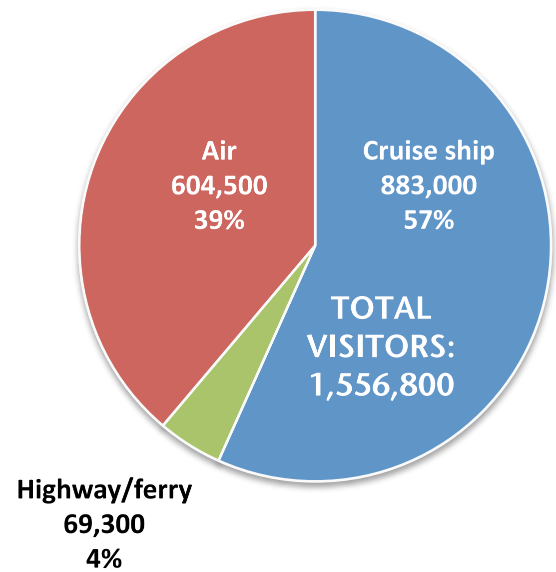
Please see *Section VI: Methodology* for further details.

An estimated 1.56 million out-of-state visitors came to Alaska between May and September, 2011. Of this number, 883,000 were cruise ship passengers, 604,500 were air visitors (entered and exited the state by air), and 69,300 were highway/ferry visitors (entered or exited the state by highway or ferry).

The total visitation figure of 1,556,800 represents an increase of 2 percent over summer 2010; however, it is still 5 percent below 2006 volume of 1.63 million, and 9 percent below the 2007 historical peak of 1.71 million.

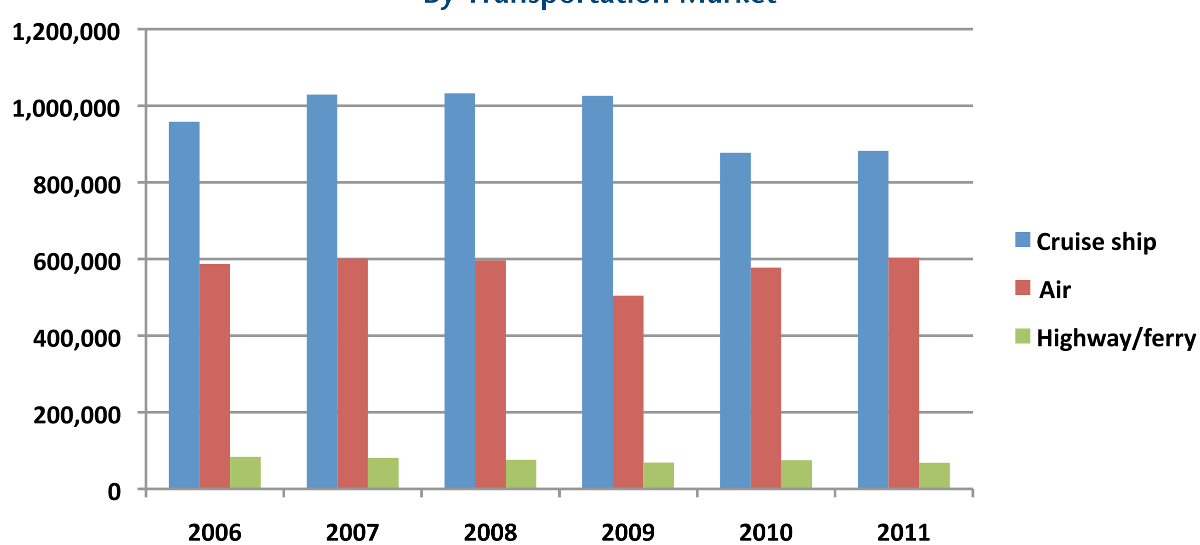
Since the last AVSP in 2006, the proportion of the market represented by cruise passengers declined from 59 percent to 57 percent. Over that same period, the proportion of air visitors increased from 36 to 39 percent, and the highway/ferry portion decreased from 5 to 4 percent.

CHART 1.1 - Alaska Visitor Volume, Summer 2011, By Transportation Market



The chart below shows how visitor volume has fluctuated by market over the last six years. The summers of 2009 and 2010 saw large decreases in reaction to the nationwide economic recession: air visitation declined significantly (by 15 percent) in 2009, while the large decline in cruise volume occurred in 2010 (by 14 percent). Although the air market has largely recovered, the cruise market is still significantly below peak levels. The overall increase of 2 percent in summer 2011 may represent the start of a rebound towards previous Alaska visitation levels. Cruise volume is projected to grow by 6 percent in 2012, and continued nationwide economic recovery should result in a boost for both the air and highway/ferry markets.

CHART 1.2 - Alaska Visitor Volume, Summers 2006-2011, By Transportation Market



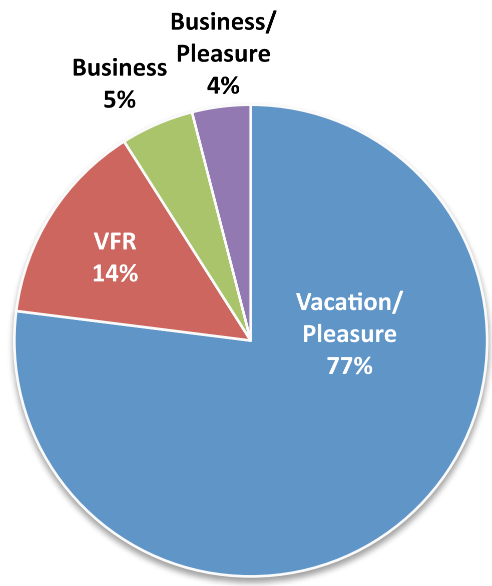
Trip Purpose

Just over three-quarters of summer 2011 visitors were traveling for purposes of vacation/pleasure, with 14 percent traveling to visit friends or relatives (VFR), and 9 percent traveling for business-related purposes.

Trip purpose rates vary widely by market: the vacation/pleasure rate is highest among cruise visitors at 98 percent, compared to 80 percent of the highway/ferry market and 43 percent of the air market. Business-related travelers are much more likely to travel by air, representing 21 percent of that market.

Trip purpose rates saw a small but significant shift between 2006 and 2011: those traveling for vacation/pleasure declined by 5 percent, while those traveling to visit friends or relatives increased by 5 percent. These shifts were more pronounced in the air market.

CHART 1.3 - Trip Purpose

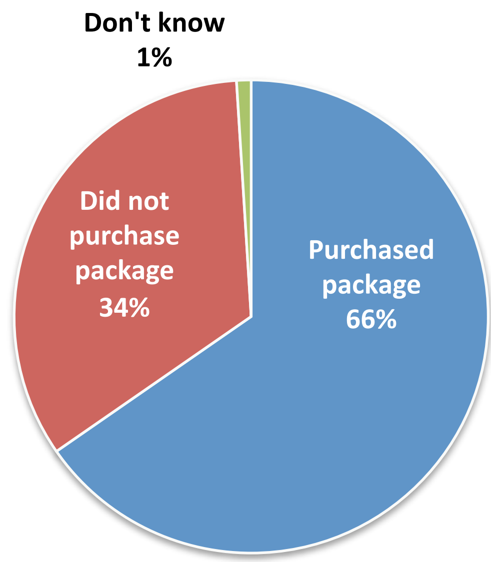


Package vs. Independent

Two-thirds of summer visitors purchased a multi-day package as part of their Alaska visit. This figure includes 100 percent of cruise visitors, 18 percent of air visitors, and 7 percent of highway/ferry visitors.

Among non-cruise visitors who purchased a package, the most popular package types were fishing lodge (44 percent), wilderness lodge (16 percent), adventure tour (13 percent), and motorcoach tour (10 percent). In terms of cruise package type, cruise visitors were more likely to be on a round-trip cruise (59 percent) than on a cross-gulf cruise (39 percent). Nearly one-quarter participated in a land tour, and 27 percent traveled independently before or after their package.

CHART 1.4 – Package Purchase

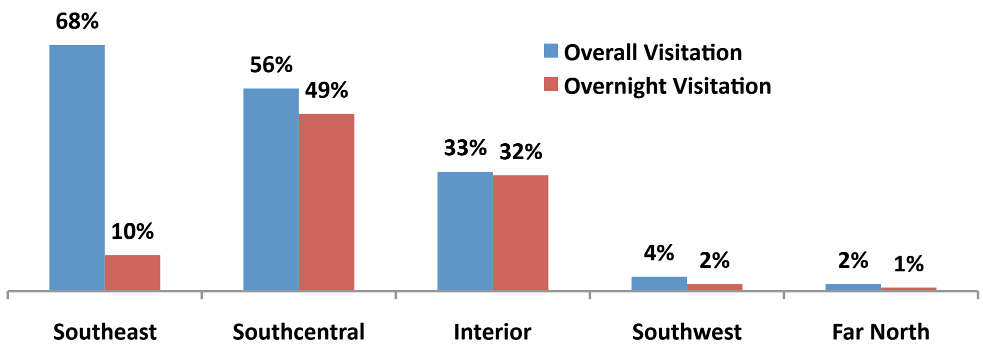


Package purchase rates declined slightly between 2006 and 2011, from 69 to 66 percent, corresponding with the slight decrease in the proportion of cruise visitors. The proportion of round-trip cruise passengers increased, while the proportion of cross-gulf passengers decreased, reflecting itinerary shifts in the Alaska cruise market. There was little difference between 2006 and 2011 in terms of non-cruise package type.

Destinations in Alaska

Southeast Alaska was the most visited region of the state, attracting 68 percent of all visitors. Southcentral attracted 56 percent, while the Interior received 33 percent. Southwest and Far North were much less frequently visited, at 4 and 2 percent, respectively. Because most Southeast Alaska visitors travel via cruise ship and do not overnight in communities, the region's share of overnight visitation falls to 10 percent. Regional visitation varied widely by transportation market: cruise visitors were much more likely to visit Southeast (99 percent), air visitors showed higher rates for Southcentral (80 percent), and highway/ferry visitors were the most likely to visit the Interior (58 percent).

CHART 1.5 - Regions Visited in Alaska, Overall and Overnight

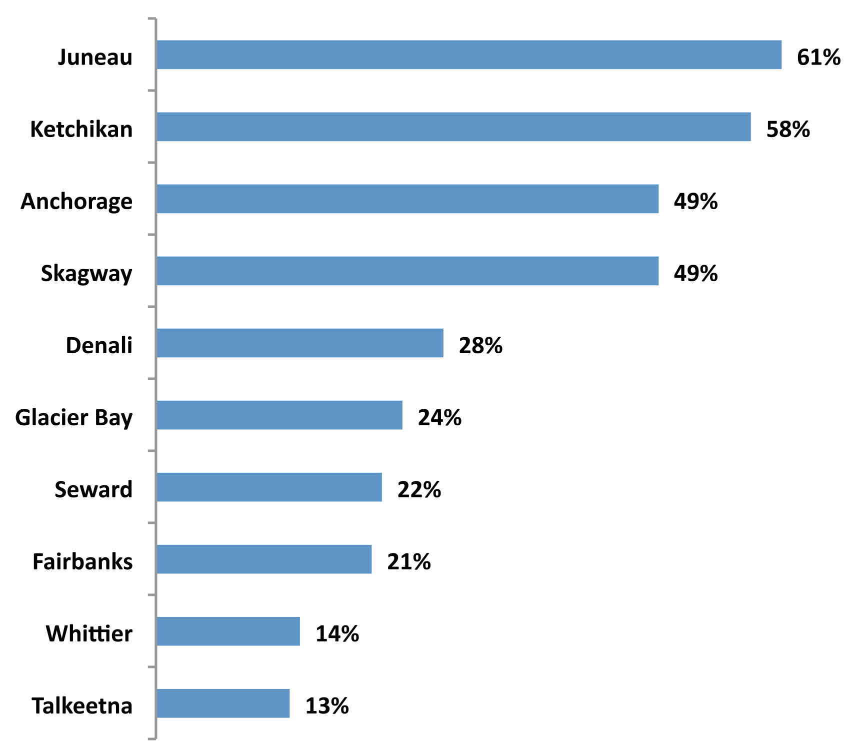


Regional visitation shifted minimally since 2006. The percentage visiting Southeast fell from 71 percent to 68 percent (reflecting the decrease in cruise traffic). Visitation rates for Southcentral and Interior held steady, while Southwest visitation increased by 1 percent, and Far North visitation declined by 1 percent.

Juneau was the most visited destination in the state at 61 percent, followed by Ketchikan at 58 percent, then Anchorage and Skagway, both at 49 percent. Two national parks, Denali and Glacier Bay, each attracted around one-quarter of visitors. Seven of the top ten destinations are cruise ship ports.

Community visitation rates showed slight shifts between 2006 and 2011. Declines of 1 to 8 percent in visitation to cruise ports reflect the cruise downturn. Lower visitation rates to some Southcentral and Interior communities correspond with a downturn in the highway/ferry market since 2006. Many community visitation rates held steady or increased between 2006 and 2011.

CHART 1.6 – Top 15 Alaska Destinations



Alaska visitors rated their overall experience in Alaska highly, with 71 percent very satisfied and 27 percent satisfied. Less than 1 percent were dissatisfied. These ratings are very similar to those in 2006, with the rate of those very satisfied up by 1 percent, and dissatisfaction down by 1 percent.

Measured another way, visitors tended to rate their trip either much higher than their expectations (26 percent), or higher than their expectations (37 percent). Only 2 percent rated their trip below their expectations. The rate of those whose trip exceeded their expectations increased by 2 percent between 2006 and 2011; the rate of those whose trip fell below expectations fell by 3 percent.

When asked to rate their satisfaction by category, the highest rated aspects were friendliness of residents (69 percent very satisfied), sightseeing (67 percent), and tours and activities (63 percent). Lower rated aspects included shopping (29 percent very satisfied), value for the money (32 percent), and restaurants (37 percent). However, even in these categories, dissatisfaction ranged from only 4 to 6 percent.

Satisfaction differed in several categories by market, with cruise visitors more satisfied with accommodations, and highway/ferry visitors more satisfied with wildlife viewing and visitor information services.

Compared to 2006, satisfaction ratings increased in several categories, including wildlife viewing (those very satisfied increased by 5 percent), tours and activities (3 percent increase), and transportation within Alaska (2 percent increase). Ratings fell for restaurants (5 percent decrease). The number of dissatisfied ratings declined for most categories between 2006 and 2011.

CHART 1.7 – Satisfaction with Overall Alaska Experience

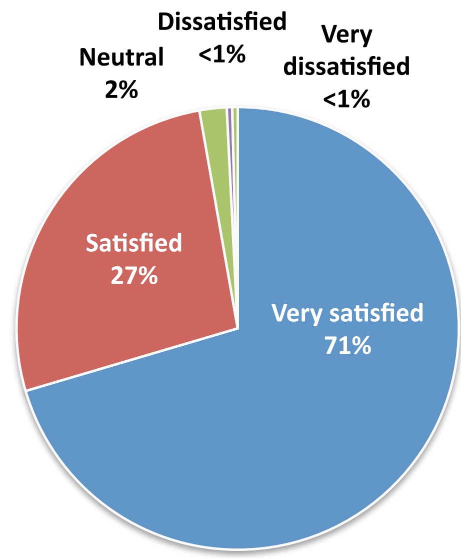
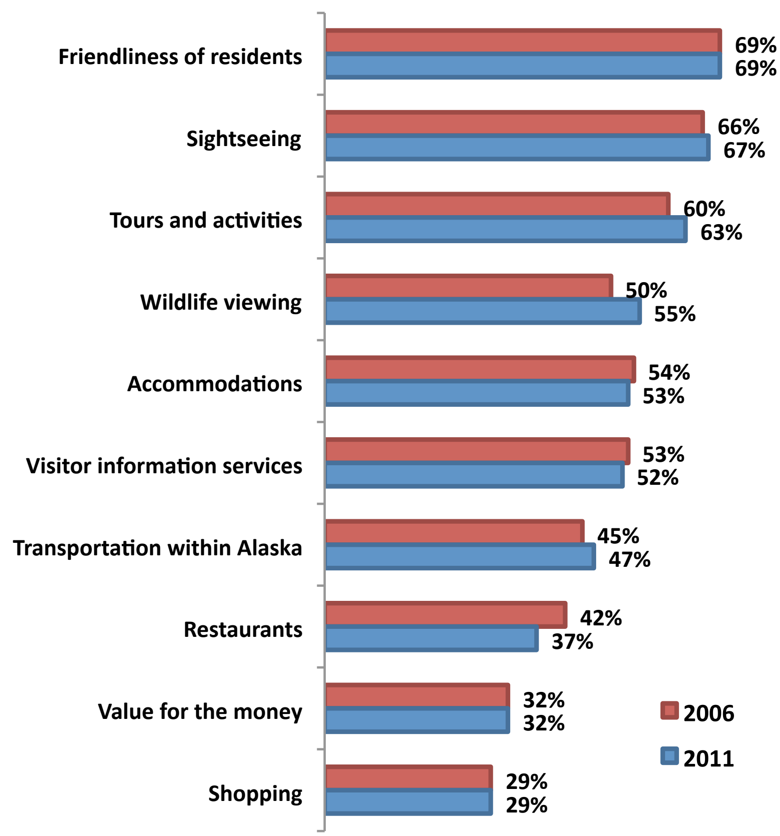


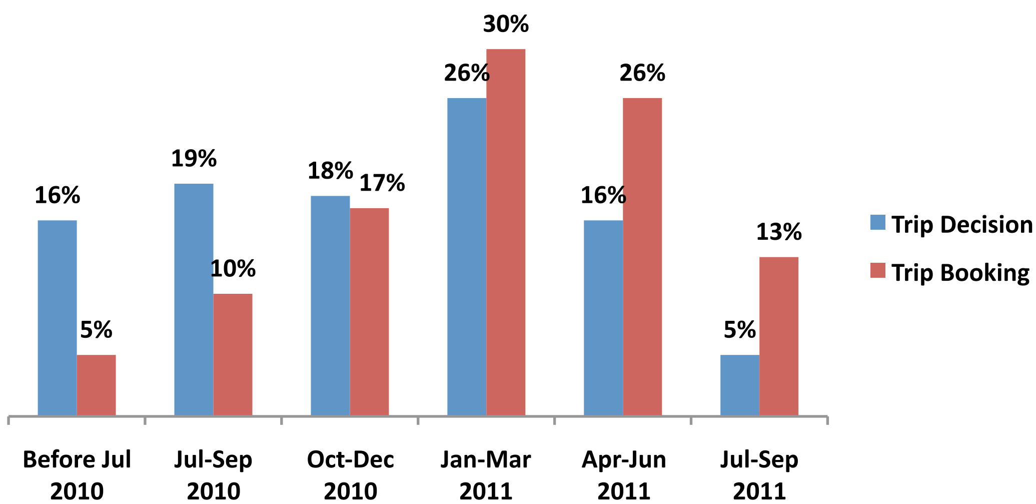
CHART 1.8 – Percent Very Satisfied, by Category, 2006 and 2011



Trip Planning

Visitors were asked two questions about the timing of their Alaska trip planning: when had they decided to come to Alaska, and when did they book their major travel arrangements. The most common time period for making the decision was January to March 2011 at 26 percent, followed by July to September 2010 at 19 percent. The most common time period for trip booking was January to March 2011 at 30 percent, followed by April to June 2011 at 26 percent. The average amount of time between the trip decision and the trip itself increased between 2006 and 2011 from 8.1 months to 8.6 months. The average advance time for booking the trip stayed exactly the same between 2006 and 2011 at 5.4 months.

CHART 1.9 - Time Periods for Alaska Trip Decision and Trip Booking

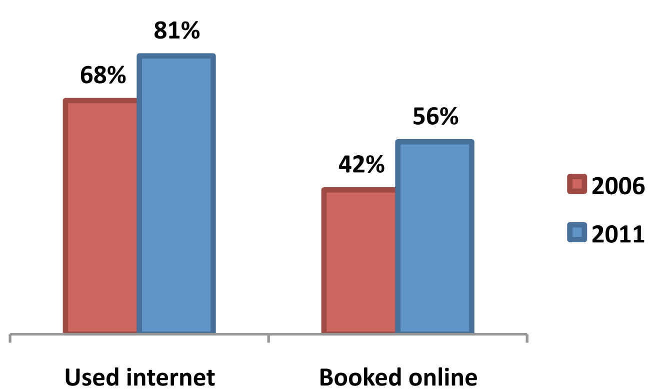


Four out of five Alaska visitors (81 percent) used the internet when planning their Alaska trip, including 83 percent of air visitors, 81 percent of cruise visitors, and 68 percent of highway/ferry visitors. Over half of visitors (56 percent) used the internet to book at least one portion of their trip. Online booking rates were highest among the air market at 70 percent, compared to 49 percent of cruise visitors and 36 percent of highway/ferry visitors.

Internet usage rates for trip planning increased significantly between 2006 and 2011, from 68 to 81 percent. Online booking rates likewise rose, from 42 to 56 percent. The most common trip components booked online were airfare (44 percent), tours (22 percent), lodging (19 percent), cruise (19 percent), and vehicle rental (11 percent).

Nearly half of visitors (47 percent) booked at least some component of their trip through a travel agent, down 5 percent from 2006.

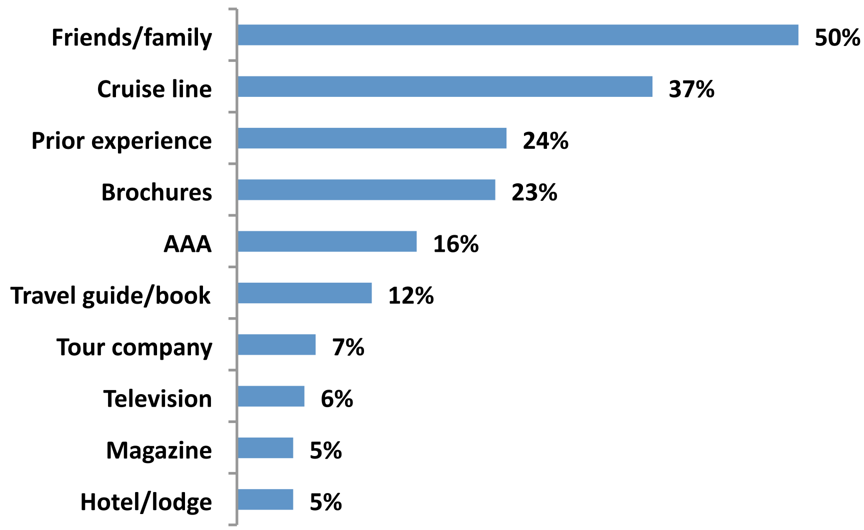
CHART 1.10 – Internet Usage and Online Booking, 2006 and 2011



After sharing information regarding internet and travel agent usage, visitors were shown a list of additional sources and asked which ones they used in planning their Alaska trip. Friends and family was the most common response at 50 percent, followed by cruise line at 37 percent, prior experience at 24 percent, and brochures at 23 percent.

One additional source was measured in a separate question: 17 percent of visitors said they had received the State of Alaska Official Vacation Planner, up 2 percent from 2006.

CHART 1.11 – Top Ten Additional Information Sources
Besides Internet/Travel Agent



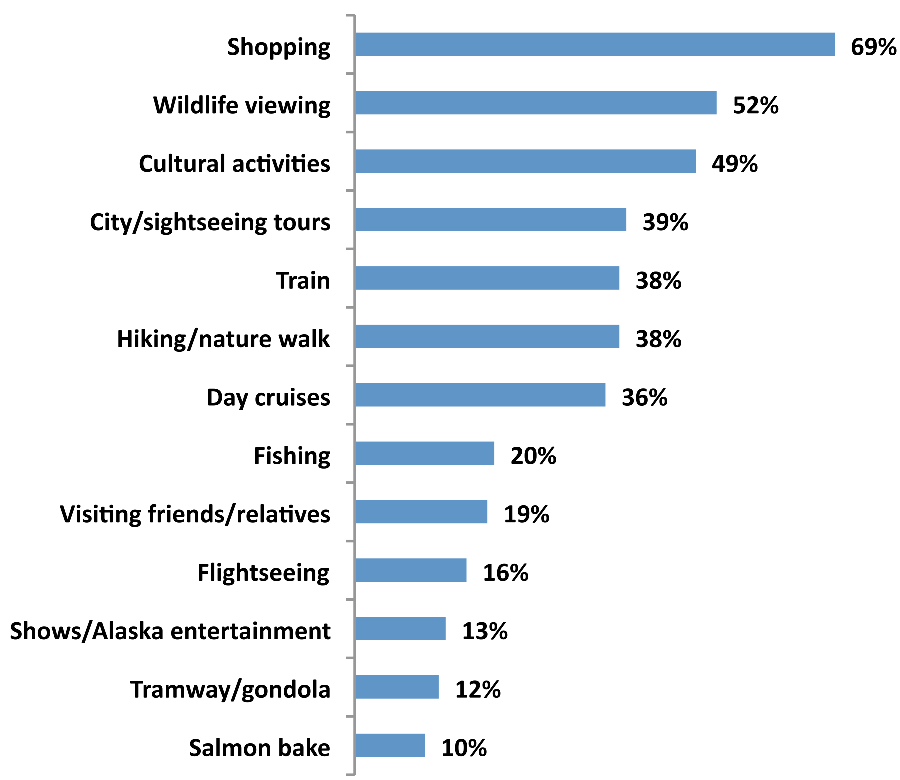
Activities

The number one activity in Alaska among summer 2011 visitors was shopping at 69 percent, followed by wildlife viewing at 52 percent and cultural activities at 49 percent. The category "cultural activities" includes museums (27 percent), historical/cultural attractions (25 percent), Native cultural tours/activities (17 percent), and gold panning/mine tours (15 percent).

Additional popular activities included city/sightseeing tours at 39 percent, train at 38 percent (including 26 percent for White Pass Yukon Route and 20 percent for Alaska Railroad), hiking/nature walk at 38 percent, and day cruises at 36 percent.

Cruise visitors were the most likely to participate in shopping, cultural activities, city/sightseeing tours, train, flightseeing, and shows/Alaska entertainment, among others. Air visitors were more likely to participate in fishing, hiking/nature walk, visiting friends/ relatives, and business. Highway/ferry visitors participated in camping and museum visits at a higher rate.

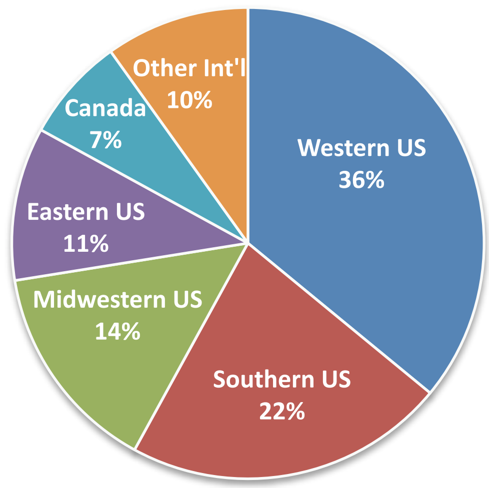
CHART 1.12 - Top Ten Alaska Activities



Among US markets, Alaska visitors were most likely to be from the West at 36 percent, followed by the South (22 percent), the Midwest (14 percent), and the East (11 percent). Canada accounted for 7 percent of visitors, while other international countries accounted for a total of 10 percent. California was the most commonly mentioned state of origin, followed by Washington, Texas, and Florida. Canadian visitors were most likely to be from British Columbia, followed by Ontario. International (non-Canadian) visitors were most likely to be from Europe, followed by Australia/New Zealand, then Asia.

Between 2006 and 2011, the percentage of visitors from the US fell by 2 percent, while Canada and the Other International category each increased by 1 percent. Within the US, the proportion of visitors from the West fell by 3 percent, while Southern visitors increased by 3 percent.

CHART 1.13 – Alaska Visitor Origin



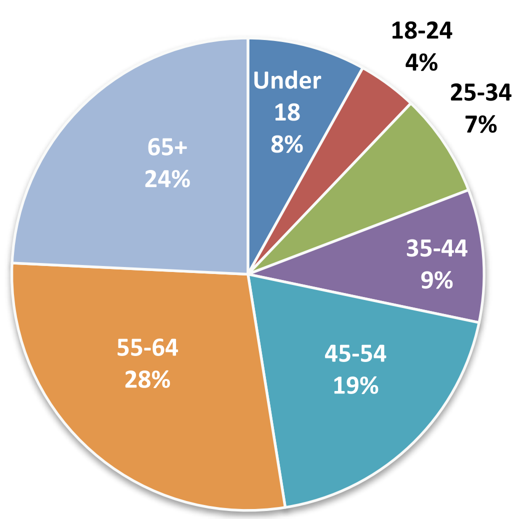
Average party size increased between 2006 and 2011, from 2.4 to 2.5 people, with party being defined as those sharing expenses. A new question in 2011 asked for "group" size, meaning any travel companions, regardless of expense-sharing. The average group size among visitors was 5.1 people.

Alaska visitors reported an average age of 50.7 years, ranging from 47.7 among air visitors, to 51.8 among highway/ferry visitors, and 52.3 among cruise visitors. The most common age groups were 55 to 64 (28 percent), 65 and older (24 percent), and 45 to 54 (19 percent). Average age decreased slightly between 2006 and 2011, from 51.6 to 50.7. The decline occurred in all three transportation markets.

One-quarter of Alaska visitors (24 percent) had children living in their household, down by 1 percent from 2006. Forty-one percent were retired or semi-retired, up by 2 percent from 2006. Six out of ten (60 percent) had earned at least a Bachelor's degree, up 1 percent from 2006.

Alaska visitors reported an average annual household income of $107,000 – a decline of 9 percent from the 2006 average (after adjusting for inflation).

CHART 1.14 – Alaska Visitor Age Ranges

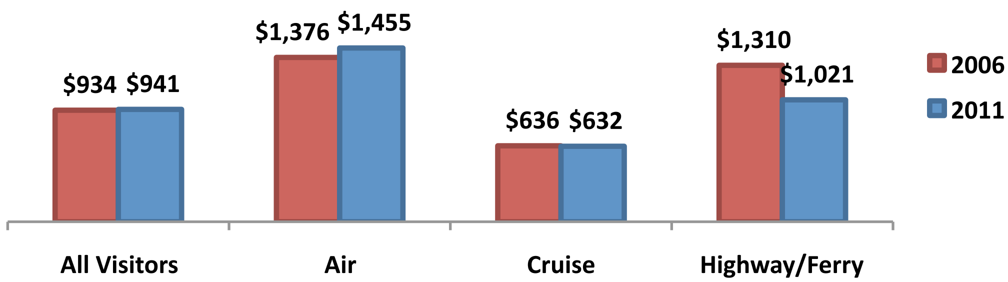


Alaska visitors spent an average of $941 per person on their trip, excluding transportation to enter/exit the state and any cruise or cruise/tour package. This figure ranged from $632 among cruise visitors, and $1,021 among highway/ferry visitors, to $1,455 among air visitors. The per-person, per-night figure among all visitors was $102, ranging from $74 among cruise visitors, to $77 among highway/ferry visitors, to $149 among air visitors.

Between 2006 and 2011, both per-trip and per-night spending were essentially flat, changing by less than 1 percent – from $934 to $941 per trip, and from $103 to $102 per night. Air visitors showed an increase in average spending, cruise visitor spending was flat, and highway/ferry visitor spending was down.

In terms of real (inflation-adjusted) dollars, per-person spending fell by 11 percent between 2006 and 2011. The decrease is likely due to a variety of factors, with the economic recession playing the largest role. In addition, the slight shift in visitor composition by trip purpose (with slightly fewer vacation/pleasure visitors and slightly more VFRs) is a factor. VFRs spent 19 percent less than vacation/pleasure visitors on a per-trip, per-person basis.

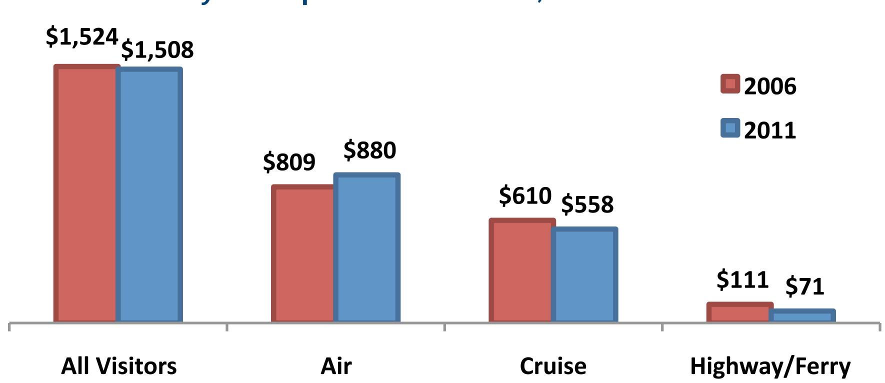
CHART 1.15 – Average Per-Person, Per-Trip Spending on Alaska Trip
By Transportation Market, 2006 and 2011



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

Alaska trip expenditures totaled $1.51 billion in summer 2011, excluding transportation costs to enter/exit the state, and cruise packages. This figure is down by less than 1 percent from 2006; however, it represents a 13 percent decline in terms of real dollars.

CHART 1.16 – Total Visitor Expenditures in Alaska in Millions of Dollars
By Transportation Market, 2006 and 2011



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

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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 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 2001 study were conducted 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 estimated visitor volume.

Visitor Survey

The visitor survey is administered to a random 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 2011-2012 (October 1-April 30). This report addresses the summer 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 results alongside 2011. To compare data for specific markets, readers are referred to the previous report, available at:

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

There were a few improvements and changes in AVSP VI from the previous generation:

- Larger overall sample, allowing for decreased margins of error (improved data accuracy)
- Expanded and improved questions
- Larger international air sample
- Online survey option available in German, Japanese, and Spanish
- Separate report on the international market, available at the website above.

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: Summary Profiles provides additional analysis for 48 subgroups, organized into the following chapters:

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

Section VI: 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 first table shows Trip Purpose rates. Under the heading "Air 2011," in the row "Vacation/pleasure," the number 77 means that 77 percent of summer 2011 air visitors were traveling for the purposes of vacation/pleasure.

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
Cruise Line Agencies of Alaska

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Section III: Visitor Volume

Introduction

This section presents estimates of the number of out-of-state visitors that came to Alaska between May 1 and September 30, 2011. 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. The following table shows where visitor/resident tallies were conducted, and how many passengers were tallied at each location.

TABLE 3.1 - Tally Locations and Volume, AVSP VI – Summer 2011

Mode	Tally Locations	Passengers Tallied
Domestic Air	Anchorage, Fairbanks, Juneau, Ketchikan, Sitka airports	43,333
International Air	Anchorage and Fairbanks airports	6,034
Highway	Survey stations on Klondike, Haines, Alcan, and Taylor highways[1]	5,238
Ferry	None; passenger residency data obtained from AMHS	0
Cruise Ship	None; all passengers assumed to be visitors	0
	Total Tallied:	**54,605**

The tallies determined visitor/resident ratios for each location, by month. These ratios were applied to monthly traffic data collected from the following sources: Anchorage International Airport, Fairbanks International Airport, Alaska Airlines, Cruise Line Agencies of Alaska, and Yukon Department of Tourism and Culture.

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

This section contains the following chapters:

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

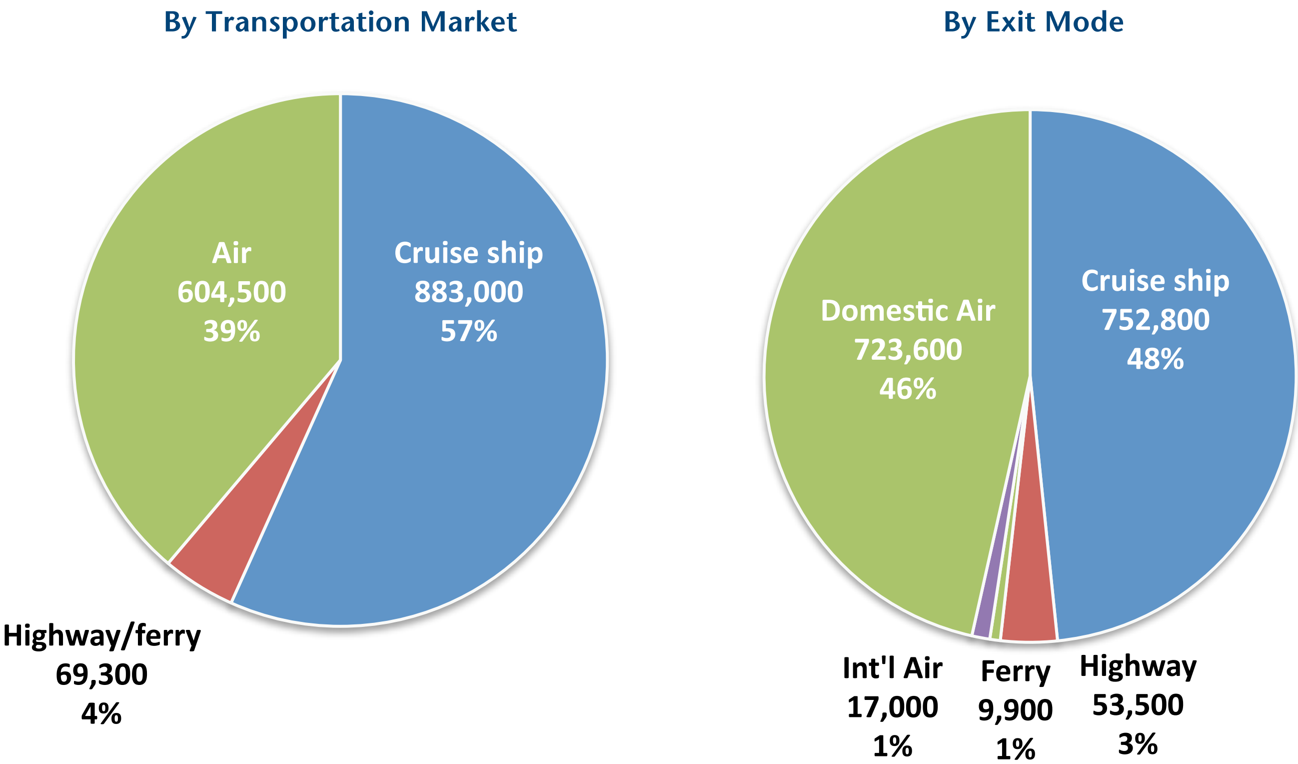
[1] While tallies and surveys were conducted on the Taylor Highway, the Top of the World Highway is indicated elsewhere in the report in reference to border crossings.

Volume by Transportation Market and Exit Mode

An estimated 1,556,800 out-of-state visitors came to Alaska between May and September 2011. In terms of transportation market (see pie chart, below left), 883,000 were cruise ship passengers, 604,500 were air visitors (entered *and* exited the state by air), and 69,300 were highway/ferry visitors (entered *or* exited the state by highway *or* ferry). Measuring traffic by transportation market is useful because many cruise ship passengers exit the state via air; in addition, the highway and ferry markets overlap, making it practical to group them together. Survey results are reported for the total visitor market as well as these three transportation markets in the following chapter.

The chart at below right shows visitor volume measured by mode of exit – that is, the transportation method used to exit Alaska. Because of the approximately 130,000 cruise ship passengers who exit the state by air, the proportion of cruise ship visitors decreases and the proportion of air visitors increases compared to transportation market figures.

CHART 3.1 - Summer 2011 Alaska Visitor Volume

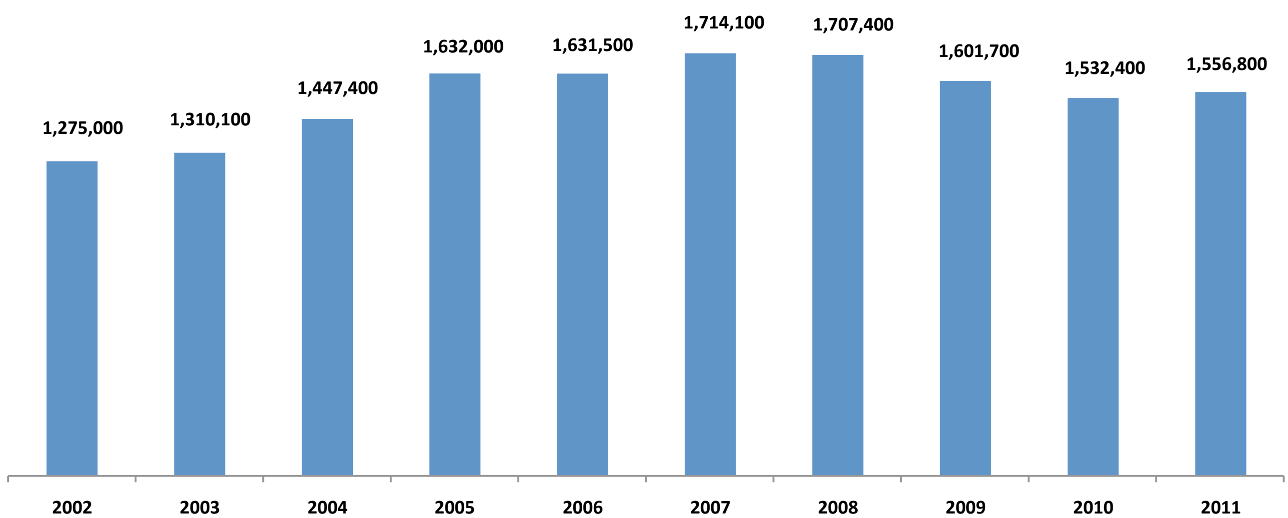


Total Visitor Volume: 1,556,800

Trends in Total Visitor Volume

The summer 2011 visitor volume of 1,556,800 represents a 1.6 percent increase over summer 2010 – a slight rebound after significant declines in both 2009 and 2010 (-6.2 percent and -4.3 percent, respectively). The changes in visitor volume over the last several years are explored in greater detail in the following sections. From a long-term perspective, the 2011 volume is 22 percent higher than the volume of a decade earlier, in 2002. The peak years for Alaska tourism in the last decade were 2007 and 2008, when volume surpassed the 1.7 million mark.

CHART 3.2 - Alaska Visitor Volume, Summers 2002-2011



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

Trends by Transportation Market

The following chart and table show how visitor volume to Alaska has fluctuated over the last six years (since the last AVSP was conducted in 2006) in terms of transportation market: air, cruise, and highway/ferry.

The most significant change in the air market occurred in 2009, when it declined by 15 percent, largely attributable to the nationwide economic recession. This market has shown a strong recovery, however, with a 14 percent increase in 2010, followed by a 5 percent increase in 2011. The 2011 air volume of 604,500 surpassed the previous peak of 602,200, set in 2007.

The cruise market has also fluctuated since 2006, with a 7 percent increase in 2007, and a 14 percent decrease in 2010. Cruise traffic has not shown the strong recovery of the air market; the 2011 total of 883,000, while 1 percent more than in 2010, is still 15 percent below the 2008 peak of 1,033,100. (A 6 percent growth in berth capacity is projected for 2012.) The cruise market is discussed in more detail in the following Visitor Industry Indicators chapter.

The highway/ferry market has generally trended downwards over the last six years, showing an overall decline of 18 percent between 2006 and 2011. As discussed throughout this report, the composition of the highway/ferry market has likewise changed since 2006. Survey results show a shorter average length of stay, a higher proportion of Canadians (including a significant percentage from the Yukon), and lower likelihood of visiting Southcentral and Interior destinations.[2] These changes correspond with highway traffic indicators. While border crossings (by private vehicle occupants) over the Alcan, Top of the World, and Haines Highways combined declined by 26 percent between 2006 and 2011, private vehicle traffic via the Klondike Highway increased by 17 percent.[3] Although residency by province was not collected in 2006, it appears that Yukon residents making short trips across the border have come to represent a larger share of the highway market.

With increases in both the air and cruise markets, and an overall increase in visitor volume of 1.6 percent, the summer 2011 season potentially represents the start of a rebound towards previous Alaska visitor levels.

CHART 3.3 - Trends in Summer Visitor Volume, By Transportation Market, 2006-2011

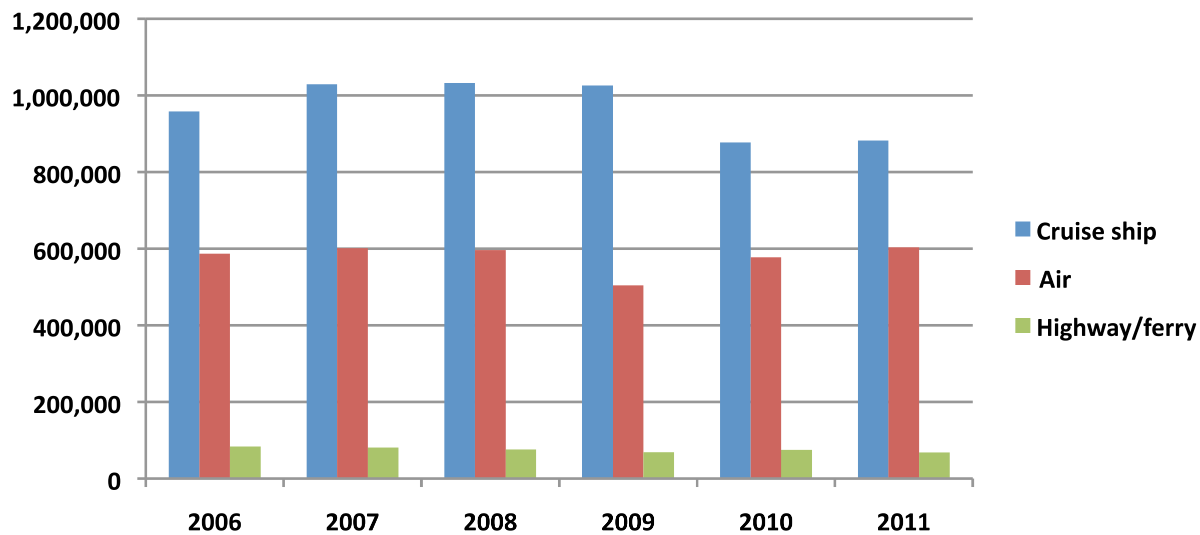


TABLE 3.2 - Trends in Summer Visitor Volume, By Transportation Market, 2006-2011

	2006	2007	2008	2009	2010	2011
Air	587,800	602,200	597,200	505,200	578,400	604,500
Cruise ship	958,900	1,029,800	1,033,100	1,026,600	878,000	883,000
Highway/ferry	84,800	82,100	77,100	69,900	76,000	69,300
Total	**1,631,500**	**1,714,100**	**1,707,400**	**1,601,700**	**1,532,400**	**1,556,800**
% change	**0.0%**	**+5.1%**	**-0.4%**	**-6.2%**	**-4.3%**	**+1.6%**

Sources: AVSP V and AVSP VI.

[2] For details on these changes, please see pages IV-10, IV-15, and IV-38.
[3] The Top of the World Highway is referenced here because it is the location of the border; elsewhere in the report, the Taylor Highway is indicated in reference to the location of tallies and surveys of visitors exiting via the Top of the World Highway.

Visitor/Resident Ratios

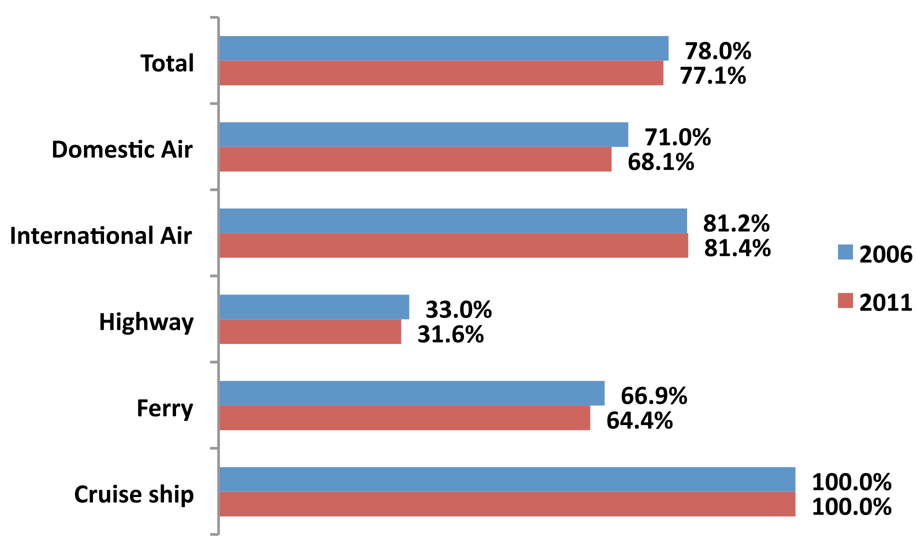
The following chart shows the percentage of non-residents out of total traffic by each mode in summer 2011. For domestic air, international air, and highway modes, the ratios below represent a composite of ratios collected by location, compiled on a monthly basis. For summer 2011, nearly 55,000 tallies were conducted of travelers to determine the ratios. No tallies were conducted of cruise ship passengers, as 100 percent are assumed to be non-residents. No tallies were conducted of ferry passengers because the Alaska Marine Highway supplies exact counts of residents and non-residents exiting Alaska aboard their vessels.

For three of the transportation modes, the proportion of travelers who were from out-of-state declined between 2006 and 2011 – corresponding with the overall decline in visitor volume. In 2006, 71.0 percent of all travelers exiting Alaska via domestic air were non-residents; that figure decreased to 68.1 percent in 2011. The highway ratio dropped from 33.0 to 31.6 percent, and ferry decreased from 66.9 to 64.4 percent. The only mode showing an increase was international air, which increased from 81.2 to 81.4 percent.

Because ratios are 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.

CHART 3.4 - Visitor/Resident Ratios, by Mode, Summer 2006 and 2011



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

Visitor Industry Indicators

To provide context for the 2011 visitor season, this section highlights major travel and economic trends in the US, as well as internationally. Trends in cruise travel are also discussed as this market represents the largest volume of visitors to the state each year. A variety of data concerning trends in Alaska's tourism market (such as bed tax, ferry ridership, and non-resident fishing license sales) are also included in order to provide additional indicators of visitor traffic, activities, and spending.

US Economic Indicators

With four out of five Alaska visitors originating from within the US, nationwide economic conditions played a role in Alaska visitor volume over the past few years. The country slid into recession in 2008, with unemployment reaching its highest level in many years in 2009. The economy remained relatively weak and unemployment high through 2011. In reaction to the recession, US residents started saving more and cutting back on discretionary spending, especially on big-ticket items like Alaska vacations. Given the state of the nation's economy, it is somewhat surprising that visitor volume did not decline more than it did in 2008, 2009, and 2010. Inflation over the period was low by historical standards and likely not a critical deciding factor as US residents considered travel to Alaska. Further discussion of these indicators follows.

- Real Gross Domestic Product (GDP) is an inflation-adjusted measure of the overall value of goods and services produced within the US in a given year. Broadly interpreted, changes in the GDP are an indicator of the health of the US economy, reflecting economic growth or contraction, and at what rate. GDP contracted in 2008 and 2009 (the height of the recession), was relatively normal with 3 percent growth in 2010, then slowed to a growth rate of 1.7 percent in 2011.
- In 2007, US unemployment neared historic lows at 4.6 percent. Significant increases in unemployment marked the onset of an economic recession as the rate increased to 5.8 percent in 2008, jumped to 9.3 percent in 2009, then peaked at an annual average of 9.6 percent in 2010 (with quarterly unemployment rates topping 10 percent). Unemployment remained stubbornly high in 2011 at 9.1 percent even as the economy grew slightly. In addition to those officially unemployed (reflected in the unemployment rate), many Americans discontinued their search for work in 2010 and 2011 (not reflected in the rate), and many more remained underemployed.
- The rate of inflation as measured by changes in the national Consumer Price Index (CPI) remained relatively low for the 2007 to 2011 period. Peak inflation for the period occurred in 2008 at 3.8 percent. The inflation rate contracted in 2009 (-0.3 percent), before edging back up to a moderate 3.1 percent in 2011.

See table, next page

TABLE 3.3 - US Economic Indicators, 2007-2011

	2007	2008	2009	2010	2011
Real GDP ($ Billions)*	$13,206.4	$13,161.9	$12,703.1	$13,088.0	$13,306.1
% change	**+1.9%**	**-0.3%**	**-3.5%**	**+3.0%**	**+1.7%**
Unemployment Rate	4.6%	5.8%	9.3%	9.6%	9.1%
US Consumer Price Index	207.3	215.3	214.5	218.1	224.8
% change	**+2.9%**	**+3.8%**	**-0.3%**	**+1.6%**	**+3.1%**

Notes: *Based on chained 2005 dollars.
Source: US Travel Association.

Domestic Travel

Several measures of overall domestic travel in the US are presented in the table below. A key measure is the price of fuel as it impacts the cost of vehicle travel as well as airline ticket prices. Fuel prices within Alaska range from somewhat higher to significantly higher than the national average depending on location.

High fuel prices, combined with the onset of the recession in 2008, resulted in a decline in domestic highway travel, including business and leisure travel. Although fuel prices declined significantly in 2009, recessionary pressure continued to depress Lower 48 travel as well as travel to Alaska. As the economy slowly began to recover in 2010 and 2011, domestic travel increased modestly. Fuel price increases in 2011 constrained growth in domestic highway travel and were likely a factor in the 2011 decline in the Alaska highway/ferry market, particularly the long-haul recreational vehicle (RV) market.

TABLE 3.4 - US Travel Indicators, 2007-2011

	2007	2008	2009	2010	2011
Total Domestic Person-Trips (Millions)*	2,004.5	1,964.9	1,900.6	1,965.7	2,004.9
% change	**+0.2%**	**-2.0%**	**-3.3%**	**+3.4%**	**+2.0%**
Business	494.3	461.1	436.5	451.5	457.9
% change	**-2.8%**	**-6.7%**	**-5.3%**	**+3.4%**	**+1.4%**
Leisure	1,510.2	1,503.8	1,464.2	1,514.2	1,547.0
% change	**+1.2%**	**-0.4%**	**-2.6%**	**+3.4%**	**+2.2%**
Average US fuel price (unleaded, per gallon, August)	$2.80	$3.78	$2.61	$2.73	$3.65
% change	**n/a**	**+35.0%**	**-31.0%**	**+4.6%**	**+33.7%**

Sources: US Travel Association, AAA Fuel Gauge Report.*Trips of 50 miles or more, one way, away from home or including one or more nights away from home.

International Visitors

While international visitors represent a relatively small share of the Alaska visitor market (10 percent in summer 2011, not including Canadians), they are an important component of the state's visitor market. International visitors are more likely to be traveling for vacation/pleasure, and they spend more money on a per-person basis while in Alaska.

International visitation to the US has rebounded since a decline of 5.1 percent in 2009, increasing from 55 million to 62 million visitors in 2011. Compared to domestic travel, the international travel market has recovered more rapidly, with increases of 8.8 percent in 2010 and 4.1 percent in 2011 (versus 3.4 percent and 2.0 percent for domestic travel).

Exchange rates for the US dollar have been favorable for many international travelers over the last few years. The value of the Japanese Yen based to the US dollar increased 44 percent from 2006 to 2011, the Australian dollar by 44 percent, the Canadian dollar by 17 percent, and the Euro by 13 percent.

TABLE 3.5 - International Visitors to US, 2007-2011

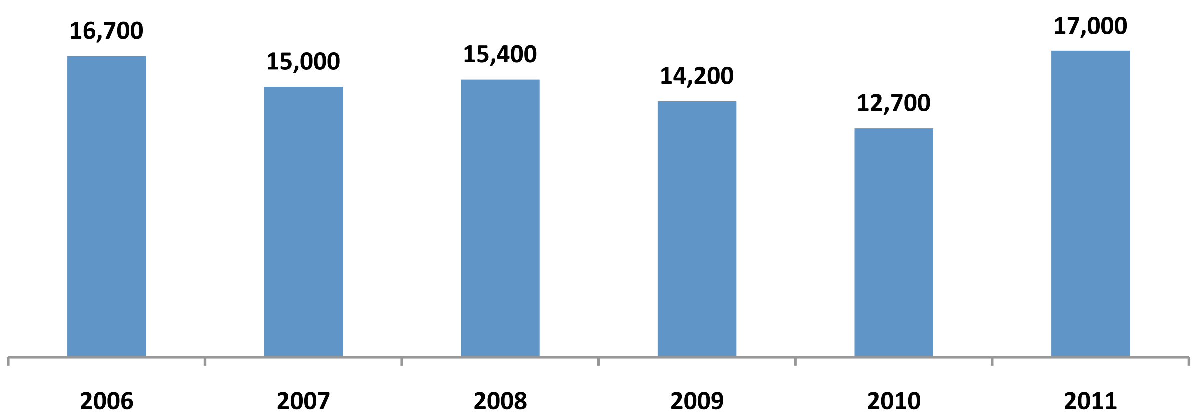
	2007	2008	2009	2010	2011
Total International Visitors to US (Millions)	56.0	57.9	55.0	59.8	62.3
% change	**+9.8%**	**+3.5%**	**-5.1%**	**+8.8%**	**+4.1%**

Source: US Travel Association.

The volume of visitors departing Alaska via international air increased significantly in summer 2011, from 12,700 to 17,000. However, the total was still only slightly above 2006 levels, after declines in both 2009 and 2010. International carriers in 2011 included Condor Air (with service to Frankfurt), Japan Airlines, Korean Airlines, and Edelweiss Air (with service to Zurich). The additions of Edelweiss and Korean Air in 2011 helped offset the loss of China Airlines, which ceased Anchorage flights in April 2011.

It is important to note that most international visitors to Alaska exit the state via other modes; however, international air traffic is a valuable indicator as the vast majority of passengers are international residents.

CHART 3.5 – Visitor Volume Departing Alaska via International Air, 2006-2011



Sources: AVSP V and AVSP VI.

Cruise Industry Trends

The global cruise market grew by an estimated 22 percent between 2006 and 2010, from 15.3 million to 18.7 million passengers. The number of passengers originating from North America showed more modest growth, increasing by 4 percent over the same period, from 10.0 million to 10.5 million.

TABLE 3.6 - Estimated Global and North American Cruise Passenger Volume, 2006-2010

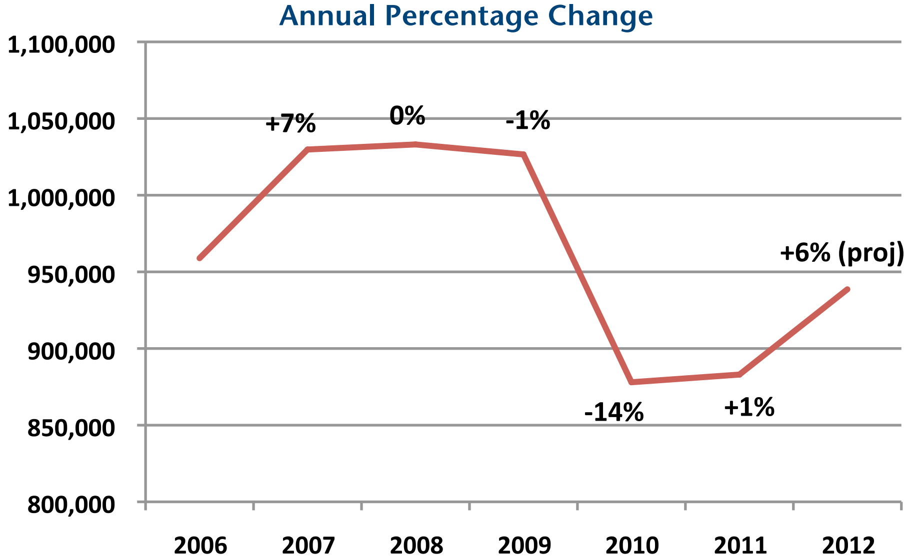
Year	Global Cruise Passengers	% Change	North American Passengers	% Change
2006	15,309,000		10,078,000	
2007	16,586,000	+8%	10,247,000	+2%
2008	17,184,000	+4	10,093,000	-2
2009	17,340,000	+1	10,198,000	+1
2010	18,740,000	+8	10,450,000	+2
% change 2006-2010		**+22%**		**+4%**

Source: Royal Caribbean International annual SEC 10-K filing, 2011.

Alaska Cruise Industry

While global and North American cruise passenger volumes show growth over the last five years, Alaska's cruise passenger volume has fluctuated considerably. Volume increased by 7 percent in 2007, was essentially flat in 2008 and 2009, then declined substantially in 2010, before rising very slightly in 2011. When the economic recession hit the US in 2008, cruise ship schedules for 2009 were already set and sailings could not be reduced or canceled. Although cruise lines were able to fill berths in 2009, they were forced to offer steep discounts. The significant reduction in prices attracted passengers that spent less than their predecessors on land tours, other activities, and in stores while in Alaska. The following year's decline of 14 percent was an after-effect of the global recession along with cruise line response to new cruise ship head taxes and regulations that affected their Alaska operations. The Alaska Legislature, responding to efforts by the Governor of Alaska and the visitor industry, reduced the passenger head tax in 2010.

CHART 3.6 - Alaska Cruise Passenger Volume 2006-2011, 2012 proj.
Annual Percentage Change



Source: Cruise Line Agencies of Alaska.

In 2011, cruise passenger volume rebounded slightly (up 1 percent). Total passenger capacity is projected to grow by 6 percent in 2012 to about 940,000 (with Princess and Norwegian adding one ship each), and there are indications of additional growth in 2013.

Alaska's Small Ships

Although small ships make up a tiny portion of Alaska's overall cruise volume, these ships can significantly impact the communities they visit. Small ships are more likely to visit ports not frequented by larger ships (such as Petersburg). In addition, passengers have a greater per-person economic impact because they often overnight in their embarkation and/or disembarkation port. The small ship industry suffered a major blow when Cruise West ceased operations at the end of its 2010 summer season. Cruise West accounted for the vast majority of small ship passenger volume in Alaska. Cruise West was also one of the largest users of hotel room nights in the Southeast region. Two companies, InnerSea Discoveries (based in Seattle) and Alaskan Dream Cruises (owned by Allen Marine in Sitka), purchased Cruise West vessels and began running similar cruises in 2011, with the potential to build passenger volume in coming years.

Additional Alaska Tourism Indicators

Highway Traffic

The chart and table below show the number of personal vehicle occupants crossing the border from Alaska into Canada between 2006 and 2011, by the four highways. All highways combined, personal vehicle crossings declined by 10 percent between 2006 and 2011, including a 3 percent decrease between 2010 and 2011. The difference between 2006 and 2011 traffic varied by highway: Alcan and Haines traffic declined the most, by 27 and 28 percent, respectively, while Top of the World Highway traffic decreased by 11 percent. Over the same time period, Klondike Highway traffic increased by 17 percent. Survey data suggests that Yukon residents account for at least part of the increase in Klondike Highway traffic.

CHART 3.7 – Highway Border Crossings by Personal Vehicle, 2006-2011

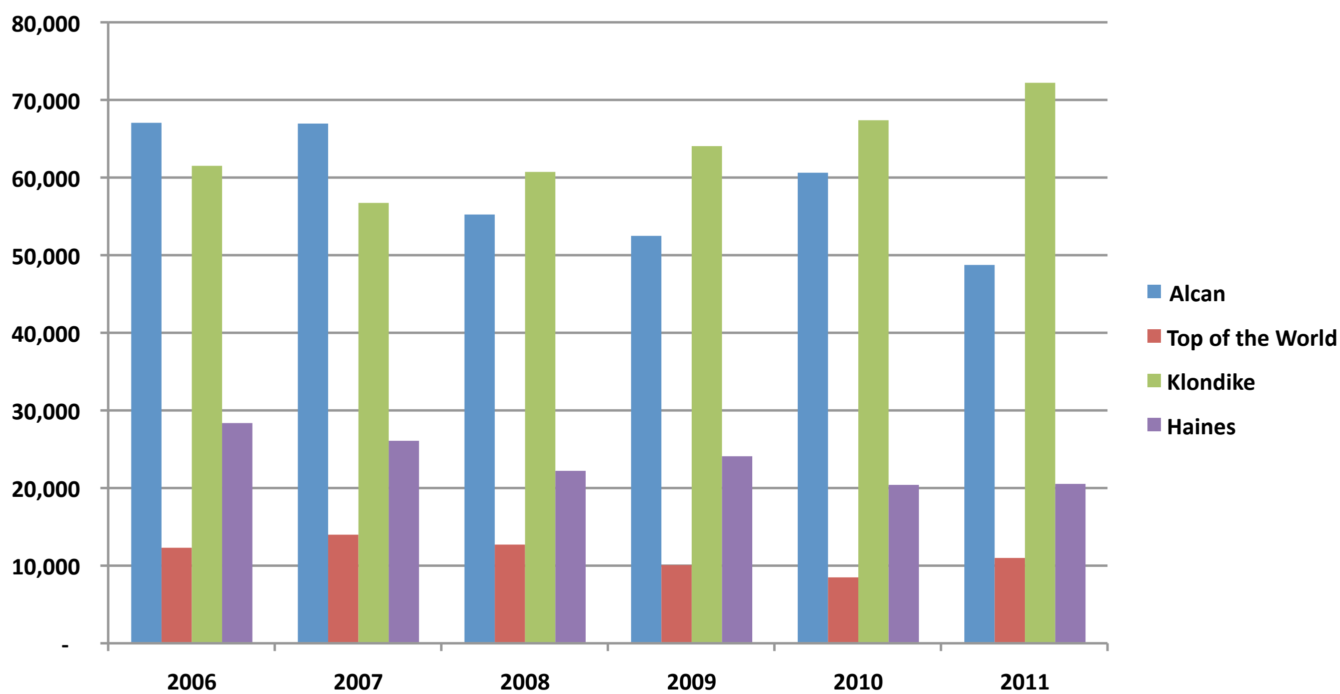


TABLE 3.7 – Highway Border Crossings by Personal Vehicle, 2006-2011

	2006	2007	2008	2009	2010	2011
All highways	168,875	163,395	150,517	150,326	156,533	152,101
% change		**-3.2%**	**-7.9%**	**-0.1%**	**+4.1%**	**-2.8%**
Alcan	66,978	66,879	55,155	52,403	60,543	48,654
% change		**-0.1%**	**-17.5%**	**-5.0%**	**+15.5%**	**-19.6%**
Top of the World	12,195	13,880	12,603	9,960	8,378	10,881
% change		**+13.8%**	**-9.2%**	**-21.0%**	**-15.9%**	**+29.9%**
Klondike	61,432	56,652	60,647	63,972	67,310	72,137
% change		**-7.8%**	**+7.1%**	**+5.5%**	**+5.2%**	**+7.2%**
Haines	28,270	25,984	22,112	23,991	20,302	20,429
% change		**-8.1%**	**-14.9%**	**+8.5%**	**-15.4%**	**+0.6%**

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 an Alaska Marine Highway System ferry during the summer, 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. The table also shows the number of out-of-state visitors who exited Alaska (that is, disembarked at Bellingham or Prince Rupert) via the Alaska Marine Highway System.

Between 2006 and 2011, AMHS non-resident ridership increased by 3.4 percent. This overall increase includes a significant decline of 16.5 percent in 2009, followed by increases of 10 percent in 2010 and 3.6 percent in 2011. Interestingly, overall non-resident ferry ridership increased while non-residents using the ferry to exit the state decreased (along with highway exits). Visitor exits via the ferry dropped by 15 percent between 2006 and 2011.

TABLE 3.8 - Alaska Marine Highway System, Non-Resident Ridership, May-September 2006-2011

	2006	2007	2008	2009	2010	2011
Non-resident passengers	85,438	88,490	92,874	77,530	85,306	88,375
% change		**+3.6%**	**+5.0%**	**-16.5%**	**+10.0%**	**+3.6%**
Non-resident passengers exiting Alaska	11,676	10,694	10,424	9,144	10,043	9,898
		-8.4%	**-2.5%**	**-12.3%**	**9.8%**	**-1.4%**

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

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.

Bed tax revenues collected in Anchorage decreased sharply in 2009, falling 22 percent from the 2008 level. Anchorage bed tax collections regained some of the losses over the next two years, with 9 percent growth in 2010 and 8 percent growth in 2011. Many other communities also suffered significant declines in bed tax collections in 2009.

TABLE 3.9 - 2nd and 3rd Quarter Bed Tax Revenue Trends, 2006-2011

	2006	2007	2008	2009	2010	2011
Anchorage	$115,108,885	$123,432,676	$132,873,921	$103,482,576	$112,909,476	$121,956,765
% change		**+7%**	**+8%**	**-22%**	**+9%**	**+8%**
Fairbanks (City)	$2,117,215	$2,164,649	$2,250,939	$1,838,652	$1,983,472	$1,906,361
% change		**+2%**	**+4%**	**-18%**	**+8%**	**-4%**
Fairbanks (Bor.)	$1,196,991	$1,336,276	$1,346,969	$1,085,851	$1,298,242	$1,224,402
% change		**+12%**	**+1%**	**-19%**	**+20%**	**-6%**
Denali	$2,518,755	$2,641,409	$1,372,902	$1,185,078	$1,329,372	$1,876,244
% change		**+5%**	**-48%**	**-14%**	**+12%**	**+41%**
Mat-Su	$293,101	$335,522	$356,123	$330,644	$280,722	$345,345
% change		**+14%**	**+6%**	**-7%**	**-15%**	**+23%**
Sitka	$361,925	$405,308	$331,230	$237,042	$260,660	$262,797
% change		**+12%**	**-18%**	**-28%**	**+10%**	**+1%**
Juneau	$775,472	$889,313	$897,324	$616,223	$738,118	$718,868
% change		**+15%**	**+1%**	**-31%**	**+20%**	**-3%**

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

Non-Resident Fishing License Sales

The sale of non-resident fishing licenses in Alaska declined from 315,469 in 2006 to 258,840 in 2011, an 18 percent decline. King salmon stamp sales declined by 30 percent for the same period. Many lodges and resorts in the state suffered a significant decline in non-resident guests in 2008 and 2009 as a result of the weak US economy. Additionally, reductions in the halibut bag limit for non-residents fishing with a guide likely affected the market in 2009 through 2011. A somewhat improved national economy likely contributed to a modest 4.4 percent increase in non-resident license sales in 2011.

TABLE 3.10 - Non-Resident Fishing License Sales, 2006-2011

	2006	2007	2008	2009	2010	2011
Total annual non-resident fishing license sales	315,469	324,142	303,838	255,777	259,055	258,840
% change		**+2.7%**	**-6.3%**	**-15.8%**	**+1.3%**	**-0.1%**
Total annual non-resident king salmon stamp sales*	134,129	133,917	110,444	90,906	89,975	93,940
% change		**+0.2%**	**-17.5%**	**-17.7%**	**-1.0%**	**+4.4%**

Source: Alaska Department of Fish & Game.
*Combined annual and day stamps.

Anchorage RV and Vehicle Tax Collection

Anchorage vehicle rental revenues increased by 6.8 percent between 2006 and 2011. Over the same period, RV rental revenue decreased by 1 percent. RV rental revenue declined significantly (by 26 percent) in 2009, before rebounding in 2010 and 2011. The increase in 2011 is somewhat surprising as fuel prices increased again and the US economy remained weak. Note: These figures include revenues generated by Alaska residents as well as visitors.

TABLE 3.11 - Anchorage RV and Car Rental Revenues, 2nd and 3rd Quarter, 2006-2011

	2006	2007	2008	2009	2010	2011
Vehicle rental revenue	$37,088,393	$40,294,675	$43,844,396	$34,203,944	$37,230,799	$39,602,111
% change		**+8.6%**	**+8.8%**	**-22.0%**	**+8.8%**	**+6.4%**
RV rental revenue	$11,518,384	$12,234,338	$12,891,514	$9,582,858	$10,491,516	$11,414,788
% change		**+6.2%**	**+5.4%**	**-25.7%**	**+9.5%**	**+8.8%**

Source: Municipality of Anchorage.

Alaska Population Trends

Alaska's resident population increased at a rate of 1.4 percent between 2006 and 2011. The increase in population of 47,000 residents since 2006 may have been a factor in the increased rate of visitors traveling for the purpose of visiting friends or relatives (see next chapter).

TABLE 3.12 - Alaska Population Estimates, May-September 2006-2011

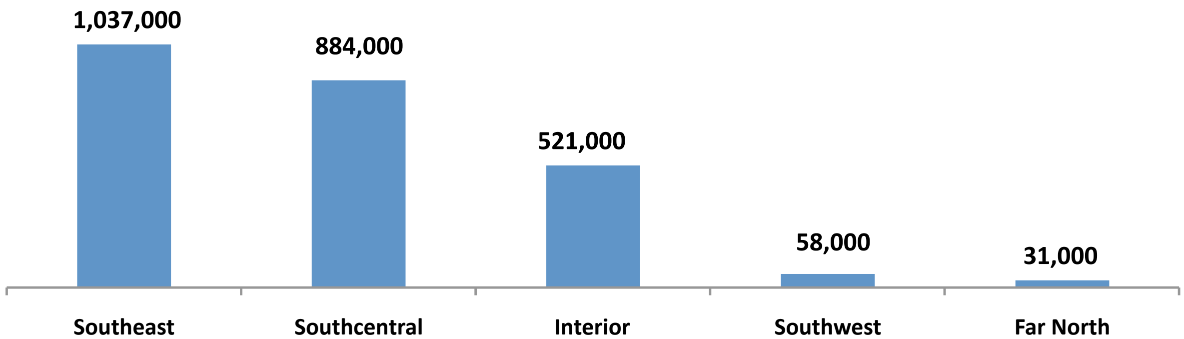
	2006	2007	2008	2009	2010	2011
Alaska population	674,583	680,169	686,818	697,828	710,231	722,190
% change		**+0.8%**	**+1.0%**	**+1.6%**	**+1.8%**	**+1.7%**

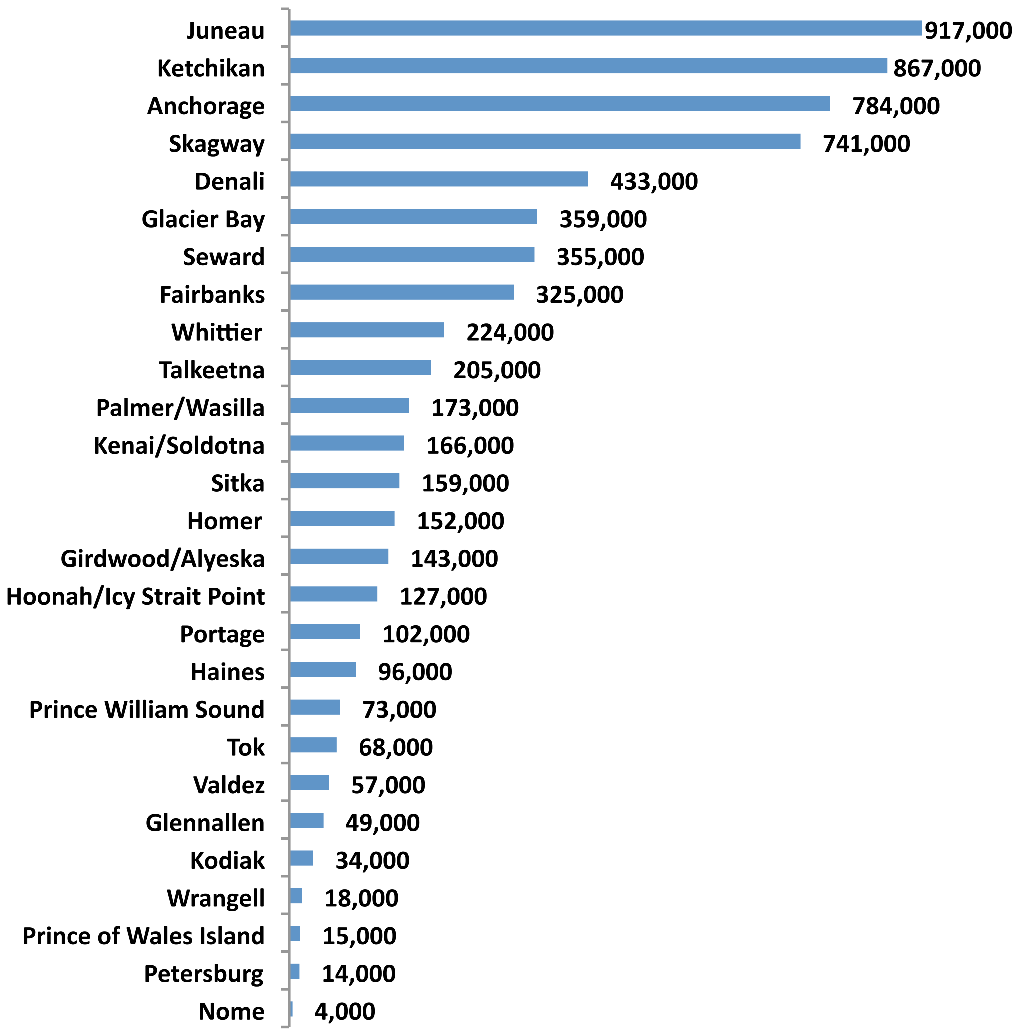
Source: Alaska Department of Labor and Workforce Development; 2010 figure from US Census.

Visitor Volume, Regions and Communities

The chart below shows estimated visitor volume by region and community for summer 2011. These figures were derived from applying survey results by market (air, cruise, highway/ferry) to total volume estimates by market. Additional details on visitation by region and community can be found in the following Visitor Profile chapter.

CHART 3.8 - Summer 2011 Alaska Visitor Volume, by Region and Community





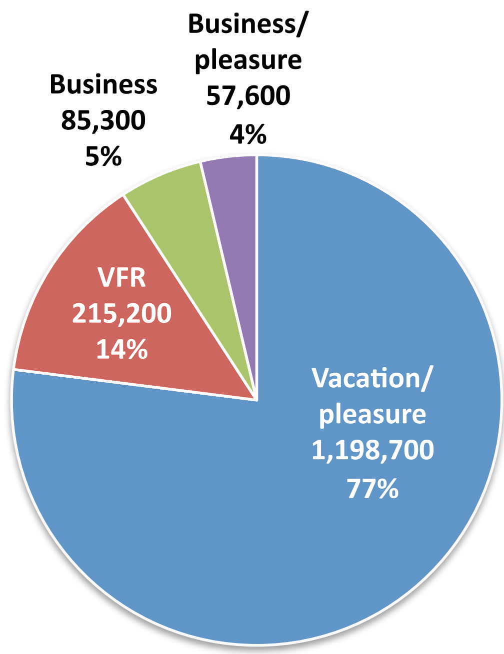
Visitor Volume by Origin and Trip Purpose

Volume by Trip Purpose

Nearly 1.2 million summer 2011 visitors traveled for vacation/pleasure. Those visiting friends/relatives (VFRs) represent the second-largest trip purpose market at 215,200, followed by business (85,300), and business/pleasure (57,600). Volumes were derived by applying survey percentages to total visitor volume.

As discussed in the following Visitor Profile section, the proportion of visitors traveling for vacation/pleasure fell between 2006 and 2011, while the proportion of those visiting friends or relatives increased. The percentages of visitors traveling for business and business/pleasure stayed the same.

CHART 3.9 - Summer 2011 Alaska Visitor Volume, By Trip Purpose

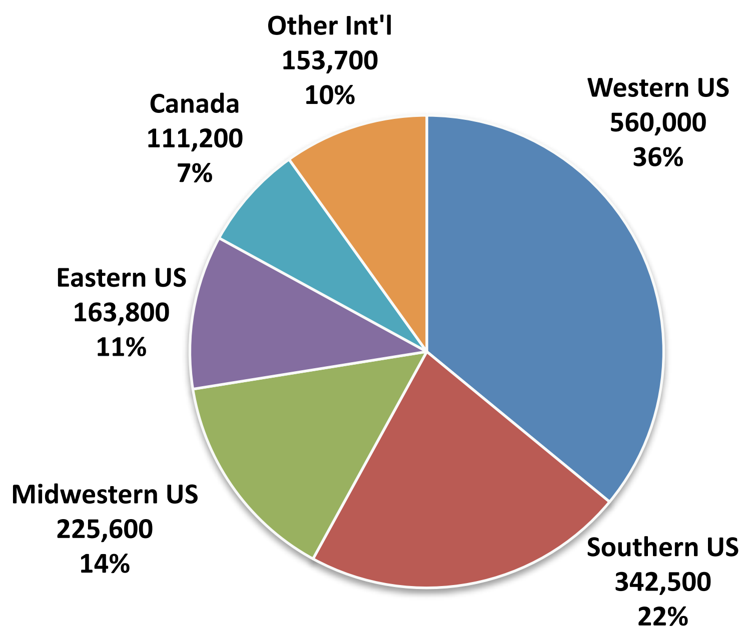


Volume by Region of Origin

Alaska visitors are most likely to be from the Western US, representing 560,000 visitors, followed by the South (342,500), the Midwest (225,600), and the East (163,800). Canada accounted for 111,200 visitors, while other international countries accounted for a total of 153,700 visitors.

These volumes are based on results of the visitor survey. Visitors were 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 3.10 - Summer 2011 Alaska Visitor Volume, By Origin



AVSP VI - Summer 2011

Section IV: Visitor Profile

Introduction

This section presents results of the visitor survey, conducted with out-of-state visitors exiting Alaska between May and September, 2011. Visitors were intercepted at all major exit points: airports, highways, cruise ship docks, and ferries. A total of 6,747 visitors were surveyed, for a maximum margin of error of ±1.2 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 "Transportation Market." The following table shows how each market is defined, their respective sample sizes, and their maximum margin of error. The three transportation markets are mutually exclusive; together, they account for the total Alaska visitor market.

The 2011 survey data in this section is presented alongside results from the 2006 AVSP survey for comparative purposes. In a few cases, data is not comparable due to modified question design or new questions introduced in 2011. The sample size for AVSP V (summer 2006) was 5,659.

TABLE 4.1 - Transportation Market Definition and Sample Sizes

Market	Definition	Sample Size	Maximum Margin of Error
All Visitors	All respondents	6,747	±1.2%
Air	Entered *and* exited Alaska by airplane; did not spend any nights aboard a cruise ship	3,894	1.6
Cruise ship	Entered *or* exited Alaska by cruise ship, *or* overnighted aboard a cruise ship	2,130	2.1
Highway/ferry	Entered *or* exited Alaska by highway *or* ferry; did not spend any nights aboard a cruise ship	723	3.6

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

Trip Purpose

Visitors' trip purposes fall into four categories: vacation/pleasure, visiting friends/relatives (VFR), business, or business/pleasure. Just over three-quarters of summer 2011 visitors were traveling for vacation/pleasure purposes; 14 percent were VFR; 5 percent were business travelers; and 4 percent were combining business with pleasure.

Trip purpose varied significantly according to transportation market, with cruise passengers the most likely to be traveling for vacation/pleasure (98 percent), followed by highway/ferry at 80 percent, then air at 43 percent. Air visitors were much more likely to be VFRs at 35 percent, compared to 13 percent of highway/ferry visitors and less than 1 percent of cruise visitors. Air visitors were also much more likely to be traveling for business (14 percent) or for business/pleasure (7 percent) when compared to other visitors.

Trip purpose rates showed a small but significant shift since the last AVSP in 2006: those traveling for vacation/pleasure decreased by 5 percent, while VFRs increased by 5 percent. The shift was more marked among air visitors, where the vacation/pleasure rate decreased by 8 percent, and the VFR rate increased by 10 percent.

CHART 4.1 - Trip Purpose, by Transportation Market, 2006 and 2011

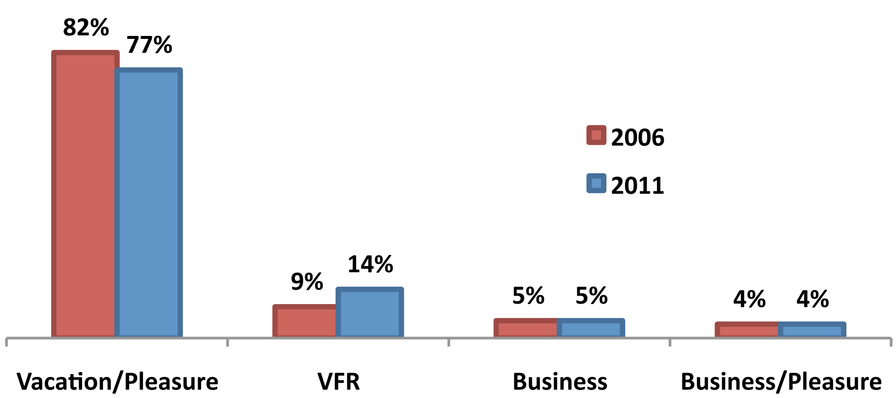


TABLE 4.2 - Trip Purpose, By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Vacation/pleasure	82	77	51	43	99	98	82	80
Visiting friends or relatives	9	14	25	35	<1	<1	12	13
Business only	5	5	15	14	<1	<1	2	3
Business and pleasure	4	4	10	7	1	2	5	4

A visitor's trip purpose has a major impact on their activities, expenditures, length of stay, trip planning, and other variables. For example, vacation/pleasure visitors tend to spend more money on their trip, while VFRs report longer average stays. An analysis of responses segmented by trip purpose is provided in the Summary Profiles section.

Packages

Two-thirds of summer 2011 visitors purchased a multi-day package as part of their Alaska trip. (Non-cruise visitors were asked about their package purchase behavior, while all cruise visitors were automatically considered package visitors.) Package purchasers included 18 percent of the air market and 7 percent of the highway/ferry market.

Purchase of multi-day packages in the air market declined slightly between 2006 and 2011, from 21 to 18 percent. This corresponds with the higher VFR rate; VFRs are less likely than vacation/pleasure visitors to purchase multi-day packages. The multi-day package rate among the highway/ferry market was similar between the two years.

CHART 4.2 - Purchase of Multi-Day Packages, 2011

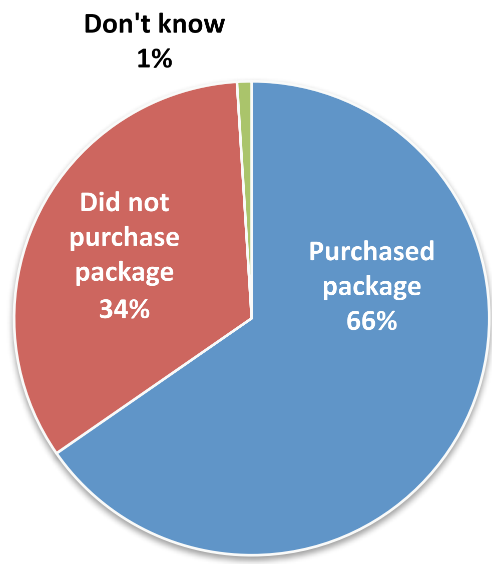


TABLE 4.3 - Purchase of Multi-Day Packages By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Purchased package	69	66	21	18	100	100	6	7
Did not purchase package	30	34	78	80	-	-	87	92
Don't know	1	1	1	2	-	-	7	1

Note: Cruise visitors were automatically considered package visitors.

Among non-cruise visitors who purchased a multi-day package, fishing lodge was the most popular type at 44 percent, followed by wilderness lodge at 16 percent; adventure tour at 13 percent; motorcoach tour at 10 percent; rail package at 9 percent; and rental car/RV package at 6 percent. (The adventure tour category includes activity-focused packages such as rafting, biking, kayaking, and hiking tours.)

Multi-day package purchasing behavior changed only slightly compared to 2006. Fishing packages were down by 2 percent, while wilderness lodge packages were up by 3 percent, and motorcoach packages were up by 5 percent. Rental car/RV packages (which made up 6 percent of packages) were formerly categorized as "other," explaining some of the decrease in the "other" category. Changes in the highway/ferry market should be viewed in light of small sample sizes; only 6 to 7 percent of this market purchased packages in 2006 and 2011.

TABLE 4.4 - Package Type, By Transportation Market, 2006 and 2011 (%)
Base: Non-Cruise Package Visitors

	Non-Cruise Visitors Package		Air Package		Hwy/Ferry Package	
	2006	2011	2006	2011	2006	2011
Fishing lodge package	46	44	48	46	10	20
Wilderness lodge package	13	16	14	15	8	37
Adventure tour	14	13	15	13	11	11
Motorcoach tour	5	10	4	10	15	3
Rail package	9	9	9	8	14	13
Rental car/RV package	n/a	6	n/a	6	n/a	14
Other	12	2	11	2	42	1

Note: Rental car/RV packages were not measured in 2006.

A new question in 2011 asked non-cruise package purchasers which portions of their trip were included in their package. The most common component was lodging at 88 percent, followed by meals at 60 percent and fishing at 44 percent.

TABLE 4.5 - Portions of Trip Included in Package (%)
Base: Non-Cruise Package Visitors

	Non-Cruise Visitors Package	Air Package	Hwy/Ferry Package
Lodging	88	88	83
Meals	60	61	43
Fishing	44	45	21
Tours	39	39	42
Air	29	29	26
Bus/motorcoach	22	22	18
Railroad	22	21	29
Vehicle/RV rental	11	11	10
Ferry	5	4	10
Other	7	7	14

Note: This question was asked for the first time in 2011.

Cruise passengers were asked several follow-up questions about their trip. Nearly all (99 percent) had cruised aboard a large ship (defined as more than 250 passengers). Fifty-nine percent were on round trip cruises, which generally depart and return to Seattle or Vancouver. Fifteen percent were on one-way cruises (where they sailed across the Gulf of Alaska and flew one-way to or from Anchorage); 24 percent took a land tour (usually rail/motorcoach packages that include Anchorage, Denali, and Fairbanks); and 1 percent cruised within the state only (mostly flying in and out of Southeast). Over one-quarter of passengers said they had spent time on their own before or after their cruise or land tour package.

Between 2006 and 2011, the rate of round-trip cruise participation increased from 52 to 59 percent, while the rate of cross-gulf cruises (which includes both cruise one-way and land tour types) declined from 46 to 39 percent. These changes reflect itinerary shifts in the marketplace: cruise lines replaced some cross-gulf itineraries with round-trip itineraries between 2006 and 2011.

However, the apparent increase in land tour participation (from 22 to 24 percent) does not correspond with what actually occurred in the marketplace between 2006 and 2011, which is a decline in land tour participation. It appears that the 2011 figure of 24 percent overstates the actual rate because of a change in behavior on the part of cross-gulf passengers, combined with misinterpretation on the part of respondents of cruise type categories.

The rate of cruisers who spent time on their own before or after their package increased from 12 percent in 2006 to 27 percent in 2011. (A profile of this market is provided in the *Summary Profiles* section.) This includes 20 percent of passengers who said they participated in a land tour. It appears likely that some of these "independent" cruisers identified themselves as land tour participants, rather than the more accurate description of having cruised one-way. The actual wording of the question is as follows:

Which of the following best describes your Alaska trip?

-Round trip cruise from Vancouver, Seattle, or San Francisco
-Cruise one-way, fly one-way
-Cruise with an overnight Alaska land tour
-In-state cruise

It is reasonable to think that some cruise visitors who traveled on their own (or bought a package separate from their cruise) mistakenly identified themselves as land tour participants.

The survey sample of cruise visitors is representative of the market based on two other indicators: rates of visitation by port as well as cruise line representation match closely to Cruise Line Agencies of Alaska traffic data (comparison of survey data to port visitation is provided in the *Destinations* section).

With regards to the change in small ship passengers (from 3 to 1 percent) and in-state cruise type (from 2 to 1 percent), these declines are explained by the loss of Alaska's major small ship line Cruise West in fall 2010.

See table, next page.

TABLE 4.6 - Cruise Package Type, 2006 and 2011 (%)
Base: Cruise Visitors

	Cruise	
	2006	2011
Large Ship vs. Small Ship		
Large	97	99
Small	3	1
Cruise Package		
Round trip	52	59
Cruise one-way, fly one-way	24	15
Cruise with land tour	22	24
In-state cruise	2	1
Spent time on own before/after cruise package		
Yes	12	27
No	88	72

A new question in 2011 asked cruise passengers who participated in a land tour which components of their trip were included in their land tour package. Around nine in ten passengers said that lodging, railroad, and motorcoach were included in their package, while 73 percent said that tours were included. Meals and air were mentioned by 30 and 28 percent, respectively.

TABLE 4.7 - Portions of Trip Included in Package, 2011 (%)
Base: Cruise Passengers who Purchased Land Tour

	Cruise
Lodging	93
Railroad	89
Bus/motorcoach	88
Tours	73
Meals	30
Air	28
Vehicle/RV rental	1
Other	2
Don't know/refused	1

Note: This question was asked for the first time in 2011.

Cruise passengers were asked another new question in 2011: whether they had purchased their land tour from their cruise line, or through a different company. Sixty-one percent said cruise line, 28 percent said a different company, while 11 percent did not know.

TABLE 4.8 - Purchased Land Tour from Cruise Line, 2011 (%)
Base: Cruise Passengers who Purchased Land Tour

	Cruise
Cruise line	61
Different company	28
Don't know	11

Note: This question was asked for the first time in 2011.

Modes of Transportation

The following table shows the modes of transportation used by visitors to enter and exit the state. Air and cruise are by far the most common modes for entry and exit, each accounting for 45 to 50 percent of visitors. Highway accounts for 3 to 4 percent, while ferry accounts for 1 percent.

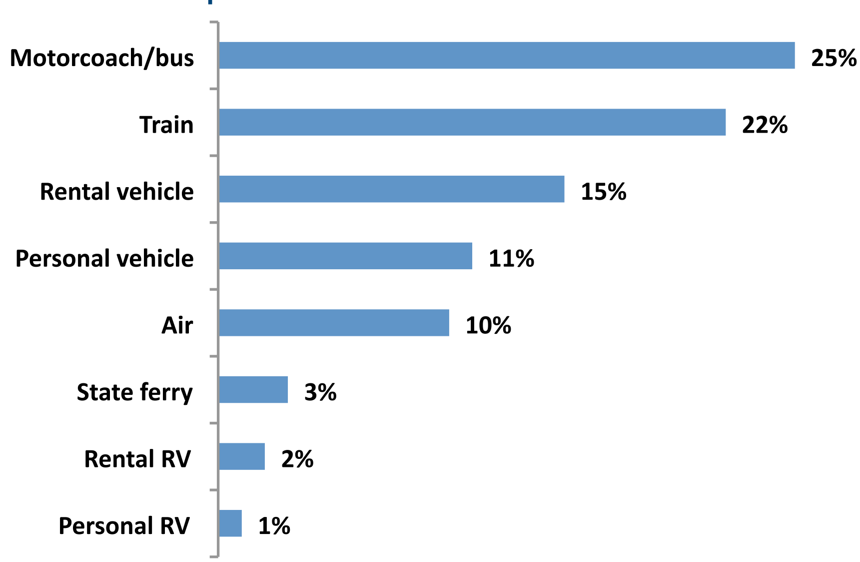
Entry/exit mode results tend to resemble those for 2006. The decline in the percentage of cruise passengers exiting by air, and corresponding increase in those exiting via cruise, reflects the increase in round trip itineraries since 2006.

TABLE 4.9 - Transportation Modes, By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Mode of Entry into Alaska								
Air	49	50	100	100	26	23	7	5
Cruise	45	45	-	-	73	77	-	-
Highway	4	4	-	-	<1	<1	78	79
Ferry	1	1	-	-	<1	-	15	16
Mode of Exit from Alaska								
Air	49	48	100	100	24	17	14	19
Cruise	47	48	-	-	76	83	-	-
Highway	4	3	-	-	<1	-	72	69
Ferry	1	1	-	-	-	-	14	13

Visitors reported using a wide variety of transportation methods to travel around the state, most commonly motorcoach, followed by train, then rental vehicle. (Cruise ship was not included in this question as it is an assumed mode of transportation among cruise visitors.)

CHART 4.3 - Transportation Used to Travel Between Communities, 2011



Transportation usage rates differ widely by market, with air visitors much more likely to use vehicles and airplanes to travel around the state, and much less likely to use motorcoaches or the train; cruise visitors reported the opposite. Highway/ferry visitors were much more likely to use the ferry and personal RVs.

There were some shifts in transportation usage since 2006. Cruise passengers were more likely to report using the train, increasing from 25 to 31 percent. Air visitors' usage of airplanes (to travel between communities) decreased from 25 to 20 percent, while their usage of personal vehicles increased from 22 to 25 percent. Highway/ferry visitors were slightly more likely to report using a personal vehicle (from 30 to 34 percent) and slightly less likely to report using a personal RV (from 26 to 20 percent).

Two related profiles are provided in the Summary Profile section: visitors who entered or exited the state via highway, and visitors who used the ferry at any point on their trip (whether to travel between communities, or to enter/exit the state).

TABLE 4.10 - Transportation Used Between Communities, By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Motorcoach/bus	26	25	9	7	38	38	2	4
Train	19	22	9	9	25	31	5	5
Rental vehicle	14	15	34	33	4	4	9	8
Personal vehicle	9	11	22	25	<1	1	30	34
Air	12	10	25	20	5	4	8	5
State ferry	3	3	4	4	1	1	25	26
Rental RV	2	2	4	4	<1	<1	5	4
Personal RV	2	1	1	1	<1	<1	26	20
Don't know/refused	1	<1	<1	<1	1	1	7	<1

Note: Cruise ship was not included in this question because it is an assumed mode of travel for all cruise visitors.

Visitors who reported entering or exiting the state via highway were asked what type of vehicle they were using. About half used a car, truck, or van, while slightly fewer used an RV or camper. Four percent used a motorcycle. Other types of vehicles include bicycles and motorcoaches.

Usage of cars/trucks/vans increased since 2006 (by 6 percent for entry, by 5 percent for exit), while RV/camper usage decreased (by 6 percent for entry, by 4 percent for exit). This likely reflects a reaction to higher gas prices, as well as an increase in Canadian residents traveling to Alaska in personal vehicles (see Destinations and Demographics chapters).

See table, next page

TABLE 4.11 - Type of Vehicle, 2006 and 2011 (%)
Base: Entered and/or Exited by Highway

	Entered by Highway		Exited by Highway[2]	
	2006	2011	2006	2011
Car/truck/van	46	52	46	51
RV/camper	47	41	48	44
Motorcycle	3	4	4	4
Other	3	4	2	1

Note: Other types of vehicles include motorcoach and bicycle.

[2] Although visitors exiting Alaska via commercial trucks and motorcoaches were counted in the Visitor Volume analysis, they were not sampled in the Visitor Survey.

Length of Stay, Destinations, and Lodging

Length of Stay

Visitors spent an average of 9.2 nights in Alaska. Average stays ranged from 8.5 nights among cruise visitors, to 9.8 nights among air visitors, to 13.2 nights among highway/ferry visitors. Nearly half of visitors spent between four and seven nights, while the majority of the rest spent between eight and 14 nights.

Compared to 2006, the average number of nights barely increased, from 9.1 to 9.2 nights. The increase was more pronounced among air visitors (from 9.4 to 9.8 nights) as well as cruise visitors (from 8.1 to 8.5 nights). The increase in cruise visitor trip length corresponds with the higher percentage who said they spent time on their own before or after their cruise package. Meanwhile, the average trip length decreased among highway/ferry visitors, from 18.8 to 13.2 nights. This is likely a reflection of a higher number of Canadian residents making short trips across the border. It also corresponds with the higher number of reported cars/trucks/vans, and lower number of RVs.

CHART 4.4 - Average Number of Nights in Alaska
By Transportation Market, 2006 and 2011

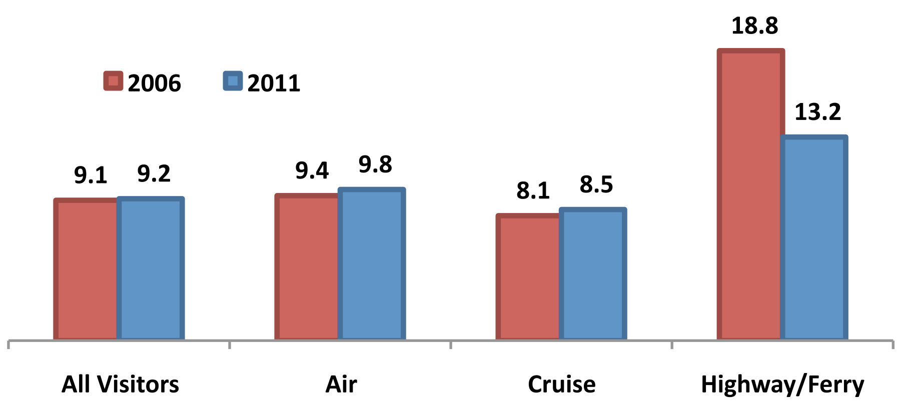


TABLE 4.12 - Length of Stay in Alaska
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
3 nights or less	7	6	11	10	4	2	19	29
4 to 7 nights	52	49	38	41	61	57	18	18
8 to 14 nights	34	36	38	35	32	38	23	26
15 to 21 nights	5	5	8	8	2	2	14	11
22 or more nights	3	3	4	6	<1	<1	26	16
Average number of nights	9.1	**9.2**	9.4	**9.8**	8.1	**8.5**	18.8	**13.2**

Lodging

Cruise ship was the most common type of lodging used by visitors at 56 percent, followed by hotel/motel at 38 percent and lodge at 19 percent. Lodging types differed significantly by market. Air visitors were the most likely to use hotel/motel and private homes, while highway/ferry visitors were much more likely than other visitors to use campground/RV and wilderness camping.

There were several small but significant shifts in lodging types used between 2006 and 2011. The slight decline in cruise ship usage, from 60 to 56 percent, reflects the overall decline in cruise's share of the overall visitor market (see *Visitor Volume* section). The increase in private home usage (from 12 to 16 percent) reflects the growing VFR market, while the decreases in hotel/motel (from 42 to 38 percent) and B&B (from 6 to 5 percent) reflect the corresponding decline in the vacation/pleasure market. All of these shifts are more pronounced among air visitors.

Any change in campground usage is difficult to detect because the 2006 categories of state/national campground and wilderness campground were merged for the 2011 survey, and the definition was expanded to include RV.

TABLE 4.13 Lodging Types Used By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Cruise ship	60	56	-	-	100	100	-	-
Hotel/motel	42	38	62	55	32	28	37	38
Lodge	19	19	21	21	19	19	8	9
Private home	12	16	31	39	1	1	22	19
B&B	6	5	14	9	1	2	10	8
Campground/RV	n/a	6	n/a	9	n/a	<1	n/a	48
Commercial campground	4	n/a	5	n/a	<1	n/a	45	n/a
State/national campground	3	n/a	5	n/a	<1	n/a	26	n/a
Wilderness camping	2	3	4	6	<1	<1	11	14
Other[1]	7	5	12	11	3	2	13	10

[1] Other lodging types include youth hostel, boat/yacht, and others.
Note: The designations "commercial campground" and "state/national campground" were combined and changed to "Campground/RV" for the 2011 survey.

Destinations

The following pages show the regions and communities visited by Alaska visitors, including overall visitation (day or overnight), overnight visitation, and the average number of nights spent in each location (based to those who overnighted in each location). The following map shows how the regions are defined. The Inside Passage region is referred to as Southeast for this report.

Survey results for visitors to specific regions and communities are provided in the Summary Profiles section.

Alaska Regional Map

Regions Visited

The Southeast region attracted the largest percentage of visitors, at 68 percent, followed by Southcentral at 56 percent, Interior at 33 percent, Southwest region at 4 percent, and Far North at 2 percent. When measuring overnight destinations only, the breakout changes: Southeast falls to 10 percent, while Southcentral becomes the most visited region at 49 percent. As the charts below show, there was very little difference in visitation between 2006 and 2011. The largest difference was a decline from 71 percent to 68 percent in Southeast visitation, corresponding with the slight decline in the representation of cruise visitors in the overall market.

CHART 4.5 - Regions Visited (Day or Overnight), 2006 and 2011

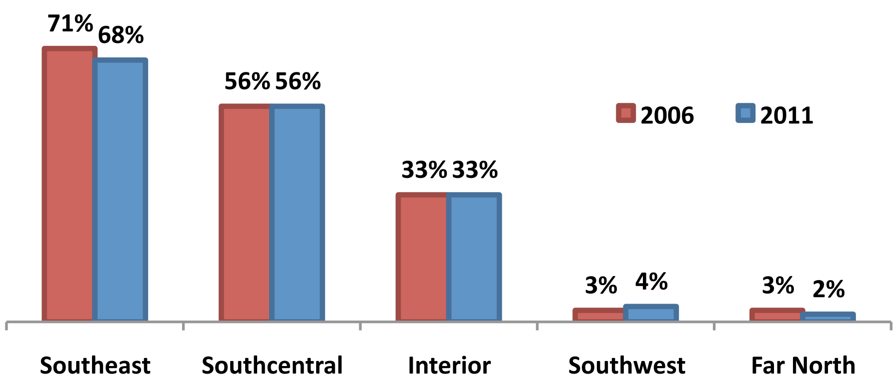
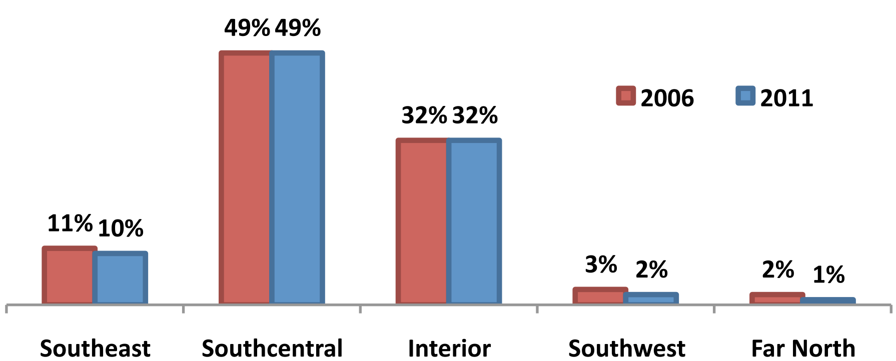


CHART 4.6 - Regions Visited Overnight, 2006 and 2011



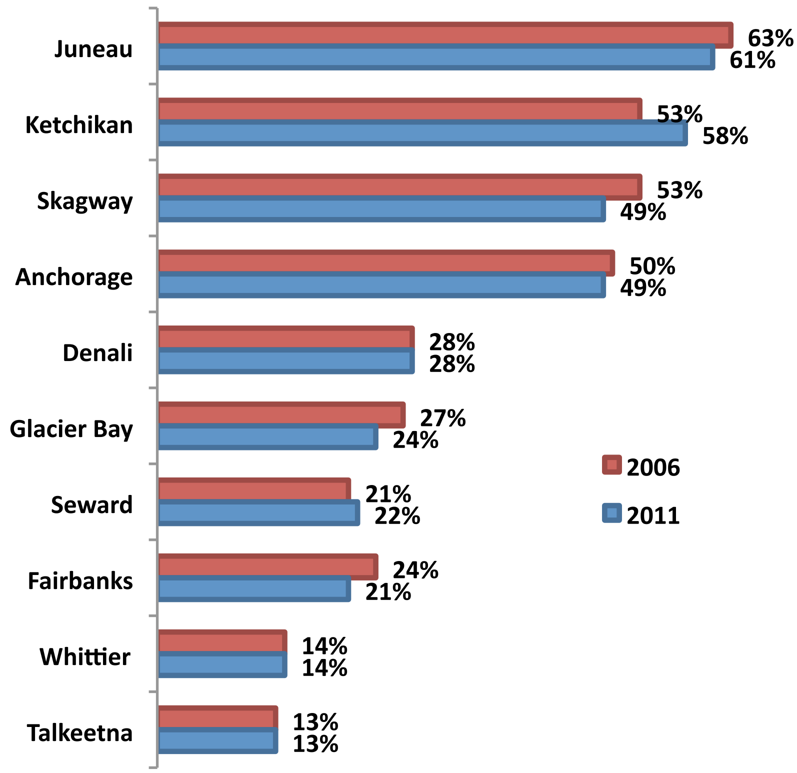
Regional visitation differed significantly by visitor market in 2011 (see tables on following pages). Visitation to Southeast ranged from 99 percent of the cruise market, to 63 percent of the highway/ferry market, to 20 percent of the air market. The air market was much more likely to visit Southcentral at 80 percent, compared to 53 percent of highway/ferry visitors and 41 percent of cruise visitors. The highway/ferry market was the most likely to visit the Interior at 58 percent, compared to 36 percent of the air market and 30 percent of the cruise market.

Regional visitation fluctuated slightly by market between 2006 and 2011, with the highway/ferry market showing larger changes. Highway/ferry visitors were less likely to visit Southcentral and Interior in 2011, reflecting the lower average length of stay and higher proportion of Canadian residents on short trips across the border.

Communities Visited

As in 2006, the number one community visited in Alaska was Juneau, with 61 percent of visitors, followed by Ketchikan at 58 percent, Skagway and Anchorage each with 49 percent, and Denali at 28 percent. Variance by visitor market resembled those discussed in the regional breakout, with cruise passengers much more likely to visit Southeast communities and air passengers much more likely to visit Southcentral communities. (See tables on following pages.) Changes since 2006 also reflect the changes in regional visitation. Air and cruise visitors show few changes in destinations between 2006 and 2011, while highway/ferry visitors show a tendency to visit fewer communities in the Southcentral and Interior regions.

CHART 4.7 - Top Ten Alaska Destinations (Day or Overnight), 2006 and 2011



Community visitation rates among cruise passengers who participated in the survey closely reflect passenger counts provided by Cruise Line Agencies of Alaska: Juneau 99 vs. 97 percent; Ketchikan 96 vs. 93 percent; Skagway 80 versus 79 percent; Sitka 15 vs. 15 percent; Seward 15 vs. 17 percent; Whittier 15 versus 16 percent; Hoonah/Icy Strait Point 14 vs. 14 percent. (Haines figures are not comparable because survey results include some Skagway passengers who visit Haines during their stay in Skagway.)

See table, next page

TABLE 4.14 - Destinations Visited (Day or Overnight) By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Southeast	71	**68**	21	**20**	99	**99**	62	**63**
Juneau	63	61	9	8	96	97	21	19
Ketchikan	53	58	7	5	81	93	19	17
Skagway	53	49	2	2	81	79	40	41
Glacier Bay National Park[1]	27	24	4	5	40	37	9	3
Sitka	18	10	6	4	25	15	9	5
Hoonah/Icy Strait Point	11	8	1	<1	17	14	2	1
Haines	8	6	1	1	9	8	27	24
Wrangell	2	1	2	1	1	1	10	5
Prince of Wales Island	1	1	2	2	<1	<1	2	2
Petersburg	2	1	2	1	1	<1	10	4
Other Southeast	6	3	3	2	8	3	3	2
Southcentral	56	**56**	79	**80**	42	**41**	69	**53**
Anchorage	50	49	73	74	37	35	59	41
Kenai Peninsula	27	30	45	45	15	19	48	36
Seward	21	22	32	31	14	17	37	27
Kenai/Soldotna	11	10	22	22	3	2	29	20
Homer	9	9	20	18	2	3	33	23
Other Kenai Peninsula	5	4	11	9	1	<1	12	12
Whittier	14	14	14	13	14	16	18	13
Talkeetna	13	13	15	15	11	12	17	10
Palmer/Wasilla	9	11	18	21	1	3	35	23
Girdwood/Alyeska	8	9	18	19	3	3	13	8
Portage	6	6	13	12	2	2	11	8
Prince William Sound	6	5	7	6	6	4	12	3
Valdez	4	4	7	6	1	1	29	18
Other Southcentral	4	9	7	19	3	2	8	17
Interior	33	**33**	37	**36**	27	**30**	71	**58**
Denali National Park[2]	28	28	26	25	27	29	46	31
Fairbanks	24	21	22	20	22	21	50	34
Tok	5	4	2	2	2	3	56	44
Glennallen	4	3	7	6	<1	<1	31	19
Other Interior	4	4	6	7	1	1	21	18
Southwest	3	**4**	8	**7**	1	**2**	2	**3**
Kodiak	1	2	3	3	<1	1	<1	1
Other Southwest	2	2	6	4	<1	<1	2	2
Far North	3	**2**	5	**3**	1	**1**	7	**5**
Nome	1	<1	1	1	<1	<1	1	-
Other Far North	2	2	4	3	1	1	6	5

[1] The 2006 designation Glacier Bay/Gustavus was changed to Glacier Bay National Park for the 2011 survey.
[2] The 2006 designation Denali/Healy/Cantwell was changed to Denali National park for the 2011 survey.

TABLE 4.15 - Overnight Destinations
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Southcentral	49	**49**	76	**77**	32	**30**	73	**55**
Anchorage	41	39	62	61	28	26	57	39
Kenai Peninsula	18	18	36	35	5	5	46	36
Seward	10	10	19	18	4	4	28	22
Kenai/Soldotna	6	6	13	13	1	1	26	16
Homer	6	5	13	11	1	1	23	17
Other Kenai Peninsula	3	3	7	5	<1	<1	9	11
Talkeetna	7	7	7	6	7	7	9	7
Palmer/Wasilla	4	4	7	8	<1	1	21	18
Valdez	4	3	6	6	<1	<1	28	17
Girdwood/Alyeska	2	3	4	5	2	1	3	3
Whittier	1	1	1	2	1	1	5	4
Portage	1	1	1	1	<1	<1	4	4
Prince William Sound	1	<1	1	1	1	<1	3	1
Other Southcentral	2	6	5	13	<1	1	7	16
Interior	32	**32**	32	**32**	28	**30**	71	**58**
Denali National Park	25	26	20	19	27	30	41	28
Fairbanks	23	20	20	18	23	21	49	32
Tok	4	4	1	2	2	2	44	39
Glennallen	2	2	3	2	<1	<1	18	14
Other Interior	2	2	3	5	<1	<1	15	12
Southeast	11	**10**	19	**17**	3	**2**	50	**56**
Juneau	4	3	7	7	2	<1	15	14
Skagway	3	3	1	1	2	1	26	34
Ketchikan	3	2	6	4	1	<1	7	8
Sitka	2	2	5	4	<1	<1	4	4
Haines	1	1	1	1	<1	-	20	20
Prince of Wales Island	1	1	2	2	<1	-	2	2
Petersburg	1	<1	1	1	<1	<1	3	2
Glacier Bay National Park	1	<1	2	1	-	<1	2	1
Wrangell	1	<1	1	1	-	<1	3	1
Hoonah/Icy Strait Point	<1	<1	<1	<1	-	<1	1	<1
Other Southeast	1	1	2	2	<1	<1	2	1
Southwest	3	**2**	7	**6**	<1	**<1**	2	**2**
Kodiak	1	1	3	3	<1	<1	<1	1
Other Southwest	2	1	5	3	<1	<1	2	1
Far North	2	**1**	4	**3**	<1	**1**	4	**3**
Nome	<1	<1	1	<1	<1	<1	<1	-
Other Far North	1	1	3	2	<1	1	4	3

[1] The 2006 designation Glacier Bay/Gustavus was changed to Glacier Bay National Park for the 2011 survey.
[2] The 2006 designation Denali/Healy/Cantwell was changed to Denali National park for the 2011 survey.

Length of Stay by Location

The table below shows the average number of nights stayed in each region and location, based to those who overnighted in each location. For example, visitors who spent at least one night in Southcentral reported spending an average of 5.9 nights in the region. Average visitation was longest in the Southwest region, at 7.5 nights, and shortest in the Southeast region, at 5.5 nights. Averages for 2011 resembled those for 2006, although highway/ferry visitors tended to report lower averages (corresponding to their lower average length of stay in Alaska when compared to 2006).

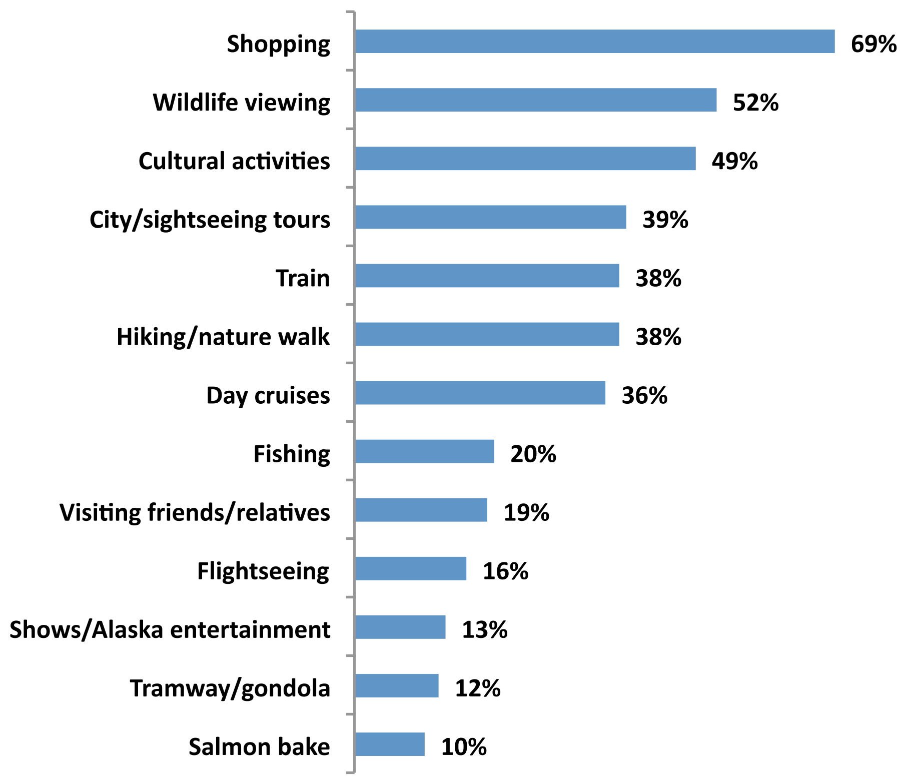
TABLE 4.16 - Average Number of Nights By Transportation Market, 2006 and 2011
(Base: Those who overnighted in each destination)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Southcentral	5.8	**5.9**	7.4	**7.6**	2.2	**2.2**	14.6	**12.1**
Anchorage	3.3	3.4	4.3	4.5	1.6	1.6	5.6	4.3
Kenai Peninsula	5.3	5.6	5.1	6.0	2.3	2.3	10.5	6.7
Seward	2.3	2.2	2.2	2.3	1.6	1.5	4.0	3.2
Homer	3.3	3.1	3.2	3.2	*	*	4.2	2.9
Kenai/Soldotna	5.2	5.6	5.0	6.0	*	*	7.5	6.7
Talkeetna	1.5	1.6	2.1	2.2	1.1	1.3	*	*
Palmer/Wasilla	5.1	5.4	5.5	6.3	*	*	4.9	3.1
Valdez	3.0	2.9	2.7	2.6	*	*	3.8	4.3
Girdwood/Alyeska	1.9	2.2	2.2	2.5	*	1.4	*	*
Whittier	1.4	1.4	*	*	1.0	*	1.7	*
Prince William Sound	2.6	4.9	*	*	*	*	*	*
Portage	*	1.6	*	*	*	*	*	*
Interior	4.3	**4.2**	5.2	**5.5**	3.2	**3.3**	7.1	**5.1**
Denali National Park	2.1	2.2	2.5	2.5	1.9	2.1	2.4	2.6
Fairbanks	2.8	3.1	4.2	5.4	1.7	1.7	5.5	3.6
Tok	1.6	1.6	1.9	2.8	*	1.0	1.7	1.5
Glennallen	1.8	1.6	1.8	1.8	*	*	1.7	1.3
Southeast	5.7	**5.5**	6.2	**6.2**	4.1	**1.7**	5.3	**5.3**
Juneau	3.4	4.0	4.0	4.4	2.1	1.7	3.1	3.3
Skagway	2.0	2.0	2.3	2.9	*	*	2.3	2.1
Ketchikan	4.0	3.8	4.2	4.0	*	*	5.2	4.5
Sitka	4.4	4.6	4.6	4.8	*	*	3.0	*
Haines	2.9	3.0	3.6	3.1	*	*	2.6	3.0
Prince of Wales Island	6.3	8.5	5.6	7.0	*	*	*	*
Petersburg	3.7	5.2	*	5.6	*	*	*	*
Glacier Bay National Park	3.7	3.1	3.8	3.8	*	*	*	*
Wrangell	3.8	3.4	*	3.3	*	*	*	*
Hoonah/Icy Strait Point	*	6.6	*	*	*	*	*	*
Southwest	7.3	**7.5**	7.5	**7.8**	*	*	*	*
Kodiak	6.9	8.3	7.1	8.3	*	*	*	*
Far North	6.1	**5.7**	7.1	**6.7**	*	*	*	*
Nome	*	*	*	*	*	*	*	*

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

Visitors were shown a list of activities and asked which of them they participated in while in Alaska. The most popular activity by far was shopping at 69 percent, followed by wildlife viewing at 52 percent. Cultural activities were mentioned by 49 percent; included in this category were museums, historical/cultural attractions, Native cultural tours/activities, and gold panning/mine tours. The next most popular activities were city/sightseeing tours at 39 percent, and train and hiking/nature walk, both at 38 percent. Two new activities were added to the list in 2011: zipline and ATV/4-wheeling, with each garnering 5 percent of the market.

CHART 4.8 - Most Popular Activities in Alaska, 2011
(Activities with 10% or more participation)



Visitors reported significantly different activity participation rates according to transportation market. Cruise visitors were the most likely to participate in shopping, cultural activities, city/sightseeing tours, train, flightseeing, shows/Alaska entertainment, and salmon bake, among others. Air visitors were more likely than other visitors to participate in fishing, hiking/nature walk, visiting friends/relatives, and business. Highway/ferry visitors showed higher rates of museum visitation and camping when compared to the other markets.

Activity participation shifted some between 2006 and 2011. Participation in city/sightseeing tours declined by 5 percent, historical/cultural attractions increased by 7 percent, and hiking/nature walks increased by 8 percent. The highway/ferry market showed more differences in activity participation between 2006 and

2011, including a decrease of 12 percent in museum visits, a decrease of 12 percent in city/sightseeing tours, and a decrease of 11 percent in fishing. Lower activity participation rates correspond to this market's lower average length of stay in Alaska compared to 2006.

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

TABLE 4.17 Activity Participation
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Shopping	71	69	61	58	77	77	60	63
Wildlife viewing	56	52	54	53	57	53	47	41
Birdwatching	19	12	20	15	18	10	14	11
Cultural activities	49	49	38	39	55	55	51	46
Museums	28	27	28	26	27	28	44	32
Historical/cultural attractions	18	25	14	20	21	29	15	21
Native cultural tours/ activities	20	17	11	10	26	22	8	10
Gold panning/mine tour	15	15	7	7	20	20	11	12
City/sightseeing tours	44	39	18	17	60	54	25	13
Train	38	38	10	11	56	57	11	14
White Pass/Yukon Route	27	26	1	1	43	43	7	10
Alaska Railroad	16	20	9	10	21	28	5	5
Hiking/nature walk	30	38	38	48	25	32	35	34
Day cruises	40	36	28	25	47	44	33	29
Fishing	20	20	38	39	8	7	36	25
Guided fishing	13	11	22	20	8	6	17	11
Unguided fishing	8	10	20	24	<1	1	26	17
Visiting friend/relatives	17	19	41	45	2	3	29	25
Flightseeing	15	16	9	12	18	20	8	9
Shows/Alaska entertainment	10	13	8	7	12	17	8	6
Tramway/gondola	12	12	5	6	16	16	4	5
Salmon bake	12	10	5	5	17	13	7	5
Dog sledding	7	9	5	5	9	12	2	3
Camping	7	7	13	14	1	<1	46	51
Kayaking/canoeing	5	7	4	8	5	7	3	5
Business	8	7	23	16	<1	1	5	4
Rafting	5	6	5	5	5	7	2	3
Zipline	n/a	5	n/a	<1	n/a	8	n/a	1
ATV/4-wheeling	n/a	5	n/a	5	n/a	5	n/a	1
Biking	3	5	3	5	2	4	3	5
Northern Lights viewing	1	2	2	3	1	2	1	1
Hunting	1	1	1	1	-	<1	1	1
Other	7	4	7	5	8	3	1	6

Note: Zipline and ATV/4-wheeling were not measured in 2006.

Compared to Expectations

Nearly two-thirds of Alaska visitors (63 percent) said their Alaska trip exceeded their expectations, including 26 percent who said it was *much* higher than their expectations. Only 2 percent said their trip fell below expectations. Cruise visitors gave slightly higher-than-average ratings, while highway/ferry visitors gave slightly lower-than-average ratings.

The above-expectations rate of 63 percent represents a slight increase from 61 percent in 2006, while the below-expectations rate of just over 2 percent declined from 5 percent in 2006. The average rating increased slightly, from 3.8 out of 5 in 2006 to 3.9 in 2011. The increase was consistent among air and cruise visitors, while highway/ferry visitors gave slightly lower ratings compared to 2006.

TABLE 4.18 - Alaska Trip Compared to Expectations
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
5 - Much higher than expectations	25	26	21	24	27	28	28	20
4 - Higher than expectations	36	37	35	36	36	38	32	35
3 - About what you expected	35	34	40	38	32	31	36	42
2 - Below expectations	4	2	4	2	4	2	4	3
1 - Far below expectations	1	<1	<1	<1	1	<1	<1	<1
Average 1-5	3.8	**3.9**	3.7	**3.8**	3.8	**3.9**	3.8	**3.7**

Note: Business visitors were screened out of this question.

Value for the Money

Visitors tended to rate Alaska either the same or better compared with other vacation destinations in terms of value for the money. Half said the value was about the same, while 37 percent said it was better or much better, and 13 percent said it was worse. Air, cruise, and highway/ferry visitors all answered similarly. Ratings varied very little from 2006 ratings.

TABLE 4.19 - Value for the Money
Compared with other vacation destinations visited in the past five years
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
5 - Much better	13	13	13	12	13	13	13	10
4 - Better	25	24	22	24	27	24	22	23
3 - About the same	48	50	49	47	48	51	47	48
2 - Worse	12	12	15	16	11	10	16	16
1 - Much worse	1	2	1	2	1	1	2	3
Average 1-5	3.4	**3.3**	3.3	**3.3**	3.4	**3.4**	3.3	**3.2**

Note: Business visitors were screened out of this question.

Satisfaction with Overall Experience

Seven out of ten (71 percent) Alaska visitors were very satisfied with their overall experience, while another 27 percent were satisfied, for an overall satisfaction rate of 98 percent. Less than 1 percent were dissatisfied with their overall experience. Cruise passengers were the most likely to be very satisfied at 72 percent, followed by air visitors at 70 percent, and highway/ferry visitors at 64 percent.

Overall satisfaction rates were very similar to 2006, with the rate of those very satisfied up by 1 percent (2 percent in the air market), and dissatisfaction declining by 1 percent.

CHART 4.9 – Satisfaction with Overall Experience, 2011

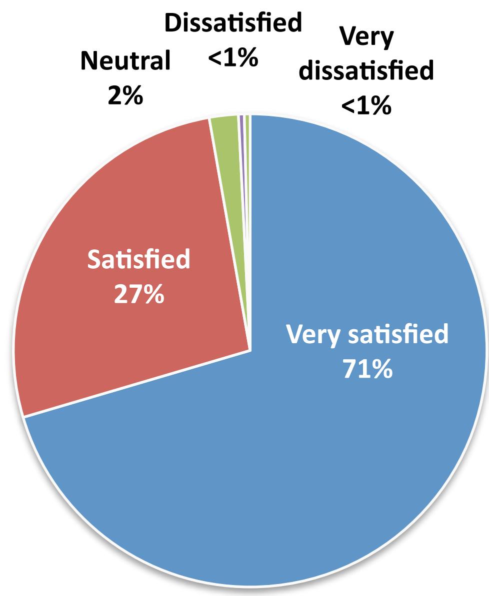


TABLE 4.20 - Satisfaction with Overall Alaska Experience By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
5 - Very satisfied	70	71	68	70	72	72	64	64
4 - Satisfied	27	27	30	28	25	25	31	34
3 - Neither/neutral	2	2	2	2	1	2	4	1
2 - Dissatisfied	1	<1	1	<1	2	1	<1	1
1 - Very dissatisfied	<1	<1	<1	<1	<1	-	-	-
Average 1-5	4.7	**4.7**	4.6	**4.7**	4.7	**4.7**	4.6	**4.6**

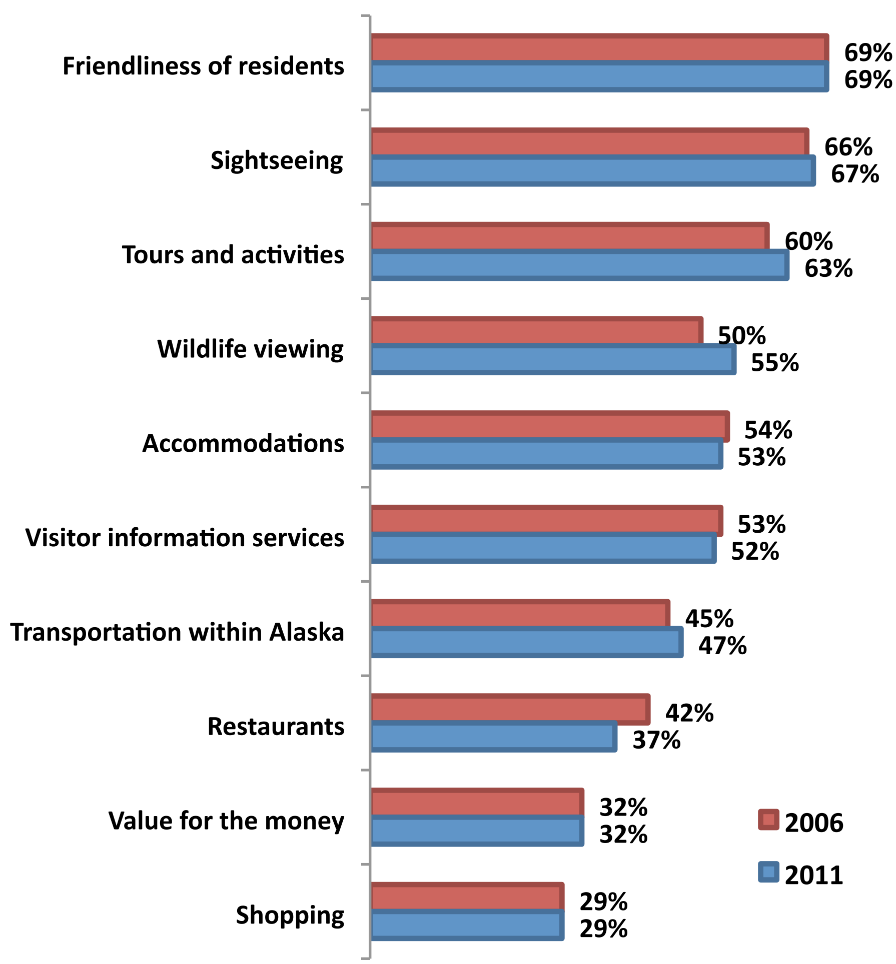
Satisfaction by Category

Visitors were asked to rate their satisfaction with a wide array of categories. The following chart and table shows the "very satisfied" ratings only; all responses are shown in tables on the following pages.

Alaska visitors expressed high levels of satisfaction with most aspects of their trip. Top-rated categories include friendliness of residents (69 percent very satisfied), sightseeing (67 percent), and tours/activities (63 percent). Categories receiving fewer very satisfied responses include shopping (29 percent very satisfied), value for the money (32 percent), and restaurants (37 percent). However, even in these categories, dissatisfaction ranged from only 4 to 6 percent.

Satisfaction ratings in 2011 generally resemble those in 2006, with a few small shifts. Satisfaction with tours/activities increased (from 60 to 63 percent very satisfied), as did satisfaction with wildlife viewing (from 50 to 55 percent). Satisfaction with restaurants declined (from 42 to 37 percent very satisfied). The number of dissatisfied ratings decreased slightly in most categories.

CHART 4.10 - Satisfaction by Category, 2006 and 2011
Percent "Very Satisfied"



Satisfaction rates differed in several categories by market. For example, cruise visitors were more likely to be very satisfied with accommodations (60 percent) compared with air visitors (46 percent) and highway/ferry visitors (42 percent). Highway/ferry visitors expressed higher satisfaction with visitor information services (63 percent) compared with cruise visitors (52 percent) and air visitors (48 percent).

By market, differences between 2006 and 2011 were mostly small except for in the highway/ferry market, where several categories saw bigger jumps: tours/activities (from 57 to 65 percent very satisfied); wildlife viewing (from 55 to 63 percent); transportation within Alaska (from 26 to 49 percent); and value for the money (from 25 to 39 percent).

TABLE 4.21 - Satisfaction Ratings by Category: % "Very Satisfied" By Transportation Market, 2006 and 2011

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Friendliness of residents	69	69	65	63	71	72	68	73
Sightseeing	66	67	67	68	65	67	63	67
Tours and activities	60	63	59	63	61	64	57	65
Wildlife viewing	50	55	56	58	47	53	55	63
Accommodations	54	53	43	46	62	60	39	42
Visitor information services	53	52	51	48	53	53	59	63
Transportation within Alaska	45	47	39	41	51	52	26	49
Restaurants	42	37	36	35	47	38	33	32
Value for the money	32	32	28	27	35	34	25	39
Shopping	29	29	26	25	30	31	29	28

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

TABLE 4.22 - Satisfaction Ratings
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Accommodations								
5 - Very satisfied	54	53	43	46	62	60	39	42
4 - Satisfied	37	39	43	42	33	35	47	50
3 - Neither/neutral	6	6	10	8	4	4	12	5
2 - Dissatisfied	2	2	3	3	1	1	2	2
1 - Very dissatisfied	<1	<1	1	<1	<1	<1	1	<1
Average 1-5	**4.4**	**4.4**	**4.3**	**4.3**	**4.5**	**4.5**	**4.2**	**4.3**
Restaurants								
5 - Very satisfied	42	37	36	35	47	38	33	32
4 - Satisfied	43	49	46	47	41	49	45	57
3 - Neither/neutral	11	12	15	13	9	11	16	8
2 - Dissatisfied	3	2	3	4	2	2	5	2
1 - Very dissatisfied	1	1	<1	1	1	1	<1	1
Average 1-5	**4.2**	**4.2**	**4.1**	**4.1**	**4.3**	**4.2**	**4.1**	**4.2**
Shopping								
5 - Very satisfied	29	29	26	25	30	31	29	28
4 - Satisfied	48	48	49	49	47	46	48	55
3 - Neither/neutral	19	19	22	22	17	18	20	13
2 - Dissatisfied	4	3	3	3	4	4	3	3
1 - Very dissatisfied	1	1	<1	<1	1	1	<1	1
Average 1-5	**4.0**	**4.0**	**4.0**	**4.0**	**4.0**	**4.0**	**4.0**	**4.1**
Visitor information services								
5 - Very satisfied	53	52	51	48	53	53	59	63
4 - Satisfied	39	40	37	39	40	41	32	32
3 - Neither/neutral	8	7	11	12	6	5	8	3
2 - Dissatisfied	1	1	1	1	1	1	1	1
1 - Very dissatisfied	<1	<1	<1	<1	<1	<1	<1	1
Average 1-5	**4.4**	**4.4**	**4.4**	**4.3**	**4.4**	**4.5**	**4.5**	**4.6**
Sightseeing								
5 - Very satisfied	66	67	67	68	65	67	63	67
4 - Satisfied	30	30	27	28	31	30	33	31
3 - Neither/neutral	4	3	5	3	3	2	3	2
2 - Dissatisfied	1	<1	1	<1	1	<1	1	<1
1 - Very dissatisfied	<1	<1	1	<1	<1	<1	<1	-
Average 1-5	**4.6**	**4.6**	**4.6**	**4.6**	**4.6**	**4.6**	**4.6**	**4.7**

Satisfaction Ratings (cont'd)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Tours and activities								
5 - Very satisfied	60	63	59	63	61	64	57	65
4 – Satisfied	33	31	32	30	33	32	32	32
3 - Neither/neutral	6	5	7	6	5	4	10	2
2 - Dissatisfied	1	1	1	1	1	1	1	1
1 - Very dissatisfied	<1	<1	<1	<1	<1	<1	1	-
Average 1-5	4.5	**4.6**	4.5	**4.5**	4.5	**4.6**	4.4	**4.6**
Wildlife viewing								
5 - Very satisfied	50	55	56	58	47	53	55	63
4 - Satisfied	32	32	33	32	31	32	31	29
3 - Neither/neutral	11	9	8	7	13	10	9	6
2 - Dissatisfied	6	3	3	2	7	4	3	2
1 - Very dissatisfied	1	1	1	<1	2	1	2	<1
Average 1-5	4.2	**4.4**	4.4	**4.5**	4.2	**4.3**	4.3	**4.5**
Transportation within Alaska								
5 - Very satisfied	45	47	39	41	51	52	26	49
4 - Satisfied	43	43	47	47	41	40	44	46
3 - Neither/neutral	8	8	9	9	7	7	25	4
2 - Dissatisfied	3	2	4	3	2	1	4	2
1 - Very dissatisfied	1	<1	1	<1	<1	<1	1	<1
Average 1-5	4.3	**4.4**	4.2	**4.3**	4.4	**4.4**	3.9	**4.4**
Friendliness of residents								
5 - Very satisfied	69	69	65	63	71	72	68	73
4 - Satisfied	26	26	29	31	25	23	24	25
3 - Neither/neutral	4	4	5	5	3	4	6	2
2 - Dissatisfied	1	1	1	1	<1	1	2	1
1 - Very dissatisfied	<1	<1	<1	<1	<1	<1	<1	-
Average 1-5	4.6	**4.6**	4.6	**4.6**	4.7	**4.7**	4.6	**4.7**
Value for the money								
5 - Very satisfied	32	32	28	27	35	34	25	39
4 - Satisfied	47	46	47	45	48	47	47	48
3 - Neither/neutral	14	16	17	18	12	14	21	9
2 - Dissatisfied	6	5	7	9	5	3	6	3
1 - Very dissatisfied	1	1	1	1	<1	1	2	1
Average 1-5	4.1	**4.0**	3.9	**3.9**	4.1	**4.1**	3.9	**4.2**

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

Recommending Alaska

Seventy-eight percent of Alaska visitors said they were very likely to recommend Alaska to friends and family, while 20 percent said they were likely, for an overall likely rate of 98 percent. Cruise and highway/ferry visitors were slightly more likely to say they would recommend at 80 percent very likely, compared to 74 percent of air visitors. Rates were very similar between 2006 and 2011.

TABLE 4.23 - Likelihood of Recommending Alaska to Friends/Family By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Very likely	79	78	77	74	80	80	77	80
Likely	18	20	20	23	17	19	20	18
Unlikely	1	1	1	1	1	1	1	1
Very unlikely	<1	<1	<1	<1	1	<1	<1	1
Don't know	1	1	2	1	1	1	3	1

Returning to Alaska

Thirty-eight percent of Alaska visitors said they were very likely to return to Alaska in the next five years, while 23 percent said they were likely, for an overall likely rate of 61 percent. The very likely rate was highest among air visitors at 62 percent, followed by highway/ferry visitors at 50 percent, then cruise visitors at 21 percent.

The intended return rate decreased only slightly between 2006 and 2011 (from 40 to 38 percent very likely). The decline was more pronounced in the air market (from 66 to 62 percent) and the cruise market (from 26 to 21 percent). The very likely rate among highway/ferry visitors increased, from 46 to 50 percent.

TABLE 4.24 - Likelihood of Returning to Alaska in Next Five Years By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Very likely	40	38	66	62	26	21	46	50
Likely	22	23	18	21	25	25	23	22
Unlikely	19	19	8	8	25	26	13	12
Very unlikely	7	7	2	2	10	11	9	8
Don't know	11	13	6	6	14	17	9	7

Previous Alaska Travel

Over one-third (38 percent) of 2011 Alaska visitors had been to Alaska previously, including 59 percent of air visitors, 62 percent of highway/ferry visitors, and 24 percent of cruise visitors. While the repeat rate among air visitors stayed exactly the same between 2006 and 2011, the rate among cruise passengers increased from 19 to 24 percent and the rate among highway/ferry visitors increased from 50 to 62 percent. The larger increase among highway/ferry visitors is likely linked to the greater proportion of Canadian residents in the highway market in 2011.

TABLE 4.25 - Repeat Alaska Travel
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
First trip to Alaska	66	62	41	41	81	76	50	38
Been to Alaska before	34	38	59	59	19	24	50	62

Repeat travelers reported an average number of 5.0 previous Alaska vacation trips, with cruise visitors reporting an average of 2.3 trips and air visitors reporting an average of 4.9 trips. The highway/ferry market had a much higher average at 19.8 trips. Again, this market has a higher proportion of Canadian residents who travel over the border more frequently. The increase in average number of trips (from 3.4 in 2006 to 5.0 in 2011) is largely attributable to the significant increase in the highway market (from 5.3 to 19.8).

When Yukon residents are removed from the survey sample, the average number of previous vacation trips changes dramatically: from 5.0 to 3.9 among all visitors, and from 19.8 to 5.2 among highway/ferry visitors.

TABLE 4.26 - Number of Previous Vacation Trips
By Transportation Market, 2006 and 2011 (%)
Base: Repeat Visitors

	Repeat Visitors		Repeat Air		Repeat Cruise		Repeat Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
None[1]	9	6	12	9	7	3	<1	3
One	35	32	25	21	52	50	30	25
Two	20	17	19	15	21	20	22	14
Three to five	20	19	23	21	14	16	20	19
Six to ten	9	9	12	10	4	5	14	11
Eleven or more	7	8	9	10	2	1	13	27
Average number of trips	**3.4**	**5.0**	**4.0**	**4.9**	**2.0**	**2.3**	**5.3**	**19.8**

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

The following table shows combined results for how repeat visitors entered and exited the state on their previous trip. Seven out of ten used air to enter/exit; 29 percent used cruise ship; 9 percent used highway; and 3 percent used the ferry. (Columns do not add to 100 because visitors sometimes use a different mode to exit the state than they did to enter.)

Modes differed significantly by market. Air visitors tended to travel almost exclusively by air on their previous trip, although 8 percent had traveled by cruise ship. Two-thirds of repeat cruise visitors had traveled by cruise ship on their previous trip. Highway/ferry visitors showed the most variance in their previous modes, with 57 percent having used highway to enter/exit and 33 percent having used air.

Previous modes used shifted slightly between 2006 and 2011, with those who cruised previously increasing from 26 to 29 percent.

TABLE 4.27 - Entry/Exit Modes Used on Previous Trip By Transportation Market, 2006 and 2011 (%)
Base: Repeat Visitors

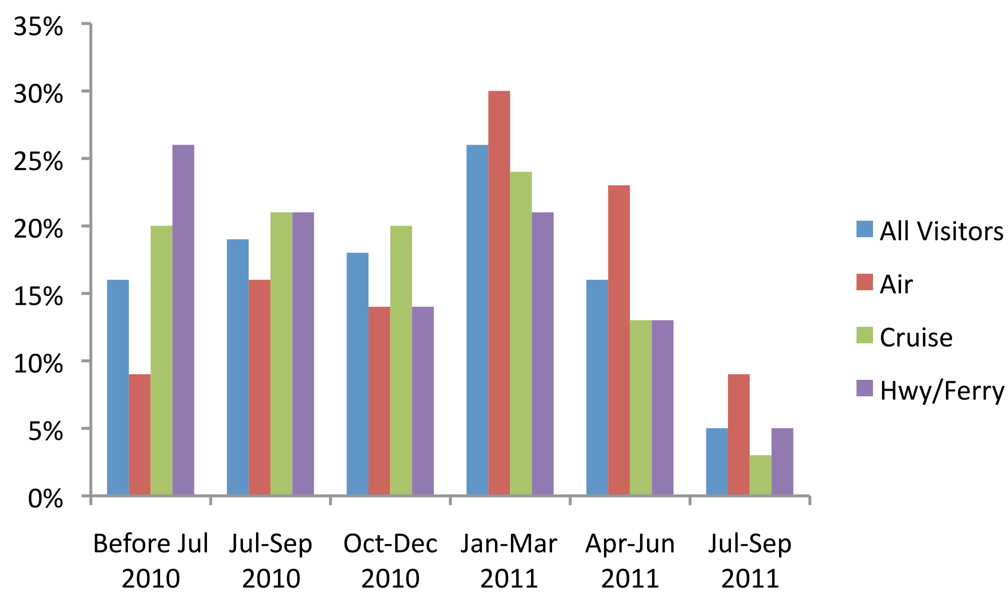
	Repeat Visitors		Repeat Air		Repeat Cruise		Repeat Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Air	72	71	91	91	51	48	28	33
Cruise ship	26	29	9	8	58	66	15	7
Highway	11	9	4	4	11	7	59	57
State ferry	3	3	2	3	3	3	6	10
Other	1	1	<1	1	2	1	<1	<1

Trip Planning Timeline

Surveyed visitors were asked two questions about their trip planning timeline: how many months ahead of time they decided to come to Alaska, and how many months ahead of time they booked their major travel arrangements. The following charts show trip decision and booking timelines based on the calendar year. The timeline was determined by applying the number of months given by respondents to the month in which they participated in the survey.

The most common period of time for trip decision was January-March 2011 (26 percent), followed by July-September 2010 (19 percent), then October-December 2010 (18 percent). Air visitors were particularly likely to decide in January-March 2011, while highway/ferry visitors were most likely to decide before July of 2010.

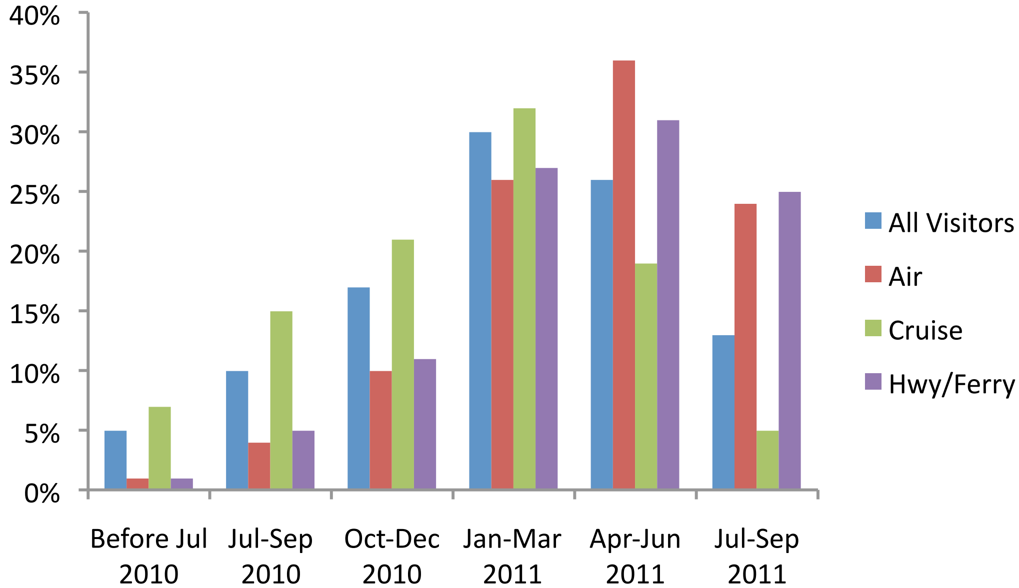
CHART 4.11 - Timeline of Alaska Trip Decision by Quarter
By Transportation Market, 2011



The most common booking period was the same as the most common decision period: January-March 2011 (30 percent), followed by April-June 2011 (26 percent). Air and highway/ferry visitors were most likely to book in April-June 2011, while cruise visitors were more likely to book in January-March 2011. In terms of individual months, the most common booking month was March 2011 (11 percent), followed by February 2011 (10 percent).

See chart, next page

CHART 4.12 - Timeline of Alaska Trip Booking by Quarter By Transportation Market, 2011



The average lead time for the trip decision was 8.6 months. Averages ranged from 6.7 months among air visitors, to 9.4 months among cruise visitors, to 12.7 months among highway/ferry visitors. The average lead time for booking was 5.4 months, ranging from 3.5 months among air visitors, to 3.6 months among highway/ferry visitors, to 6.6 months among cruise visitors.

The average lead time for deciding on the trip increased from 8.1 months in 2006 to 8.6 months in 2011. All markets showed an increase, although it was more pronounced among highway/ferry visitors. The average lead time for booking major arrangements held steady at 5.4 months. The average stayed the same for air visitors at 3.5 months, decreased slightly for cruise visitors (from 6.7 to 6.6 months), and increased for highway/ferry visitors (from 2.6 to 3.6 months).

See table, next page

TABLE 4.28 - Trip Planning Timeline
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
How far in advance did you decide to come on this trip to Alaska?								
Less than 1 month	6	4	13	6	2	3	13	5
1 to 3 months	16	15	25	20	12	12	12	10
4 to 6 months	28	26	28	27	28	27	24	19
7 to 11 months	21	17	14	10	26	22	9	7
One year or more	28	28	20	19	31	33	39	35
Don't know/Refused	n/a	10	n/a	18	n/a	3	n/a	24
Average # of months	**8.1**	**8.6**	**6.3**	**6.7**	**9.0**	**9.4**	**9.5**	**12.7**
How far in advance did you book your major travel arrangements?								
Less than 1 month	9	11	18	22	2	3	37	17
1 to 3 months	25	26	38	37	18	20	24	17
4 to 6 months	33	32	31	26	36	36	19	18
7 to 11 months	22	17	9	9	30	23	4	7
One year or more	9	11	2	3	13	16	2	2
Don't know	n/a	4	n/a	3	n/a	2	n/a	40
Average # of months	**5.4**	**5.4**	**3.5**	**3.5**	**6.7**	**6.6**	**2.6**	**3.6**

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

Internet Usage

Four out of five Alaska visitors (81 percent) used the internet to plan some portion of their trip in 2011, including 56 percent who booked at least some component online. Air visitors (83 percent) and cruise visitors (81 percent) used the internet at a higher rate than highway/ferry visitors (68 percent). Air visitors were particularly likely to book online: 70 percent, compared to 49 percent of cruise visitors and 36 percent of highway/ferry visitors.

Internet usage rates for trip planning increased significantly between 2006 and 2011, from 68 percent to 81 percent among all visitors. The increase was consistent across all three markets. Online booking rates increased as well, from 42 to 56 percent. The increase was most pronounced in the cruise market, where online booking rose from 33 to 49 percent.

CHART 4.13 - Used Internet to Plan Alaska Trip
By Transportation Market, 2006 and 2011

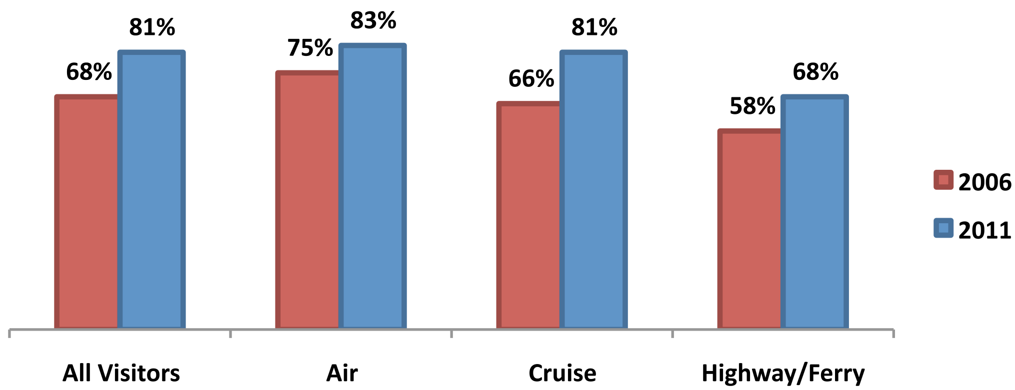


CHART 4.14 - Used Internet to Book Alaska Trip
By Transportation Market, 2006 and 2011

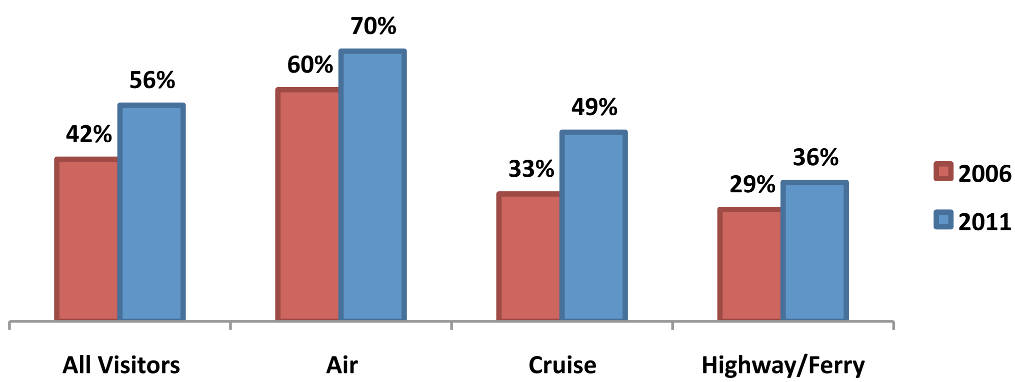


TABLE 4.29 - Internet Usage
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Used internet	68	81	75	83	66	81	58	68
Research only	26	25	14	13	32	32	28	32
Research and book	42	56	60	70	33	49	29	36
Did not use internet	30	18	25	15	33	19	40	31
Don't know	2	1	1	2	2	1	2	1

The most common trip component booked online was airfare, at 44 percent, followed by tours at 22 percent, lodging at 19 percent, cruise at 19 percent, and vehicle rental at 11 percent. (These figures are based to all visitors, not only those who booked over the internet.) Online booking varied widely by market. Air visitors were more likely than other markets to book airfare at 66 percent, lodging at 31 percent, and vehicle rental at 24 percent. Cruise visitors were much more likely to book their cruise and tours online.

Compared to 2006, 2011 online booking rates were up in every category, most dramatically for airfare (from 30 to 44 percent). The increases occurred within each transportation market and for each trip component.

TABLE 4.30 - Trip Components Booked over Internet
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Airfare	30	44	56	66	18	32	17	19
Tours	15	22	9	15	19	28	7	10
Lodging	12	19	24	31	5	11	9	20
Cruise	11	19	1	2	18	30	-	1
Vehicle rental	7	11	17	24	1	4	5	8
Overnight packages	1	3	2	4	<1	3	<1	2
Ferry	1	2	1	3	<1	<1	9	19
Other	<1	<1	<1	<1	-	<1	<1	1

Note: Some highway/ferry visitors enter or exit the state via air, and others travel by air within the state.

Travel Agent Usage

Nearly half of summer 2011 visitors booked at least some component of their trip through a travel agent, ranging from 9 percent of highway/ferry visitors, to 17 percent of air visitors, to 68 percent of cruise visitors. Travel agent usage was down overall from 52 to 47 percent. The decrease was more pronounced among air visitors (down 7 percent); among cruise visitors and highway/ferry visitors, the decrease was 3 and 2 percent, respectively.

TABLE 4.31 - Travel Agent Usage
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Booked through travel agent	52	47	24	17	71	68	11	9
Did not book through travel agent	45	52	75	81	25	30	86	90
Don't know	3	2	1	2	4	2	3	1

A new question in 2011 asked travel agent users which trip components they booked through a travel agent. The most common trip component booked through a travel agent was cruise at 38 percent of all visitors, followed by airfare at 25 percent, tours at 15 percent, and lodging at 12 percent. (These figures refer to the entire market, not only those who used a travel agent.) Cruise visitors showed the highest rate of travel agent usage for most components, while highway/ferry visitors showed lower rates for everything except vehicle rental and ferry.

TABLE 4.32 - Trip Components Booked through a Travel Agent
By Transportation Market, 2011 (%)

	All Visitors	Air	Cruise	Hwy/Ferry
Cruise	38	1	64	<1
Airfare	25	14	34	6
Tours	15	4	23	3
Lodging	12	9	15	4
Overnight packages	7	3	10	1
Vehicle rental	3	5	1	3
Ferry	1	<1	<1	3
Other	<1	<1	<1	-

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

Usage of State of Alaska Information Sources

One-quarter of Alaska visitors (26 percent) said they had visited travelalaska.com, ranging from 25 percent of air visitors, to 27 percent of cruise visitors, to 32 percent of highway/ferry visitors. The overall usage rate increased by 3 percent, from 23 to 26 percent, with each market showing a slight increase since 2006.

Seventeen percent of visitors reported receiving the State Vacation Planner. The rate was highest among highway/ferry visitors at 25 percent, compared to cruise visitors at 17 percent and air visitors at 16 percent. Overall, the rate of receiving the planner increased by 2 percent since 2006. The increase was more pronounced in the air market, which increased by 4 percent. The cruise market reported a 2 percent increase, while the highway/ferry market reported a 2 percent decrease.

TABLE 4.33 - Usage of State of Alaska Information Sources By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Did you visit the official State of Alaska travel website? (www.travelalaska.com)								
Yes	23	26	21	25	23	27	30	32
No	68	68	74	70	65	66	61	65
Don't know	8	6	4	5	10	7	7	3
Did you receive the Official Alaska State Vacation Planner?								
Yes	15	17	12	16	15	17	27	25
No	78	79	84	81	76	78	66	72
Don't know	7	4	4	4	9	5	8	3

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 other Alaska information sources and asked to identify which they had used in planning their Alaska trip. The most common additional information source was friends/family/co-workers, used by 50 percent of visitors. Other popular sources include cruise line, prior experience, brochures, AAA, and travel guides/books. Cell phone apps were added to the list in 2011, but were only mentioned by 2 percent of respondents.

Usage rates varied widely by market. Air visitors tended to rely heavily on friends/family/co-workers and prior experience. Cruise visitors were significant users of cruise lines and AAA compared to the other two markets. Highway/ferry visitors often mentioned prior experience, brochures, and the Milepost.

Compared to 2006, rates were fairly similar. Mentions of friends/family/co-workers increased by 5 percent, mostly due to a larger increase (from 52 to 60 percent) in the air market. The percentage of visitors citing television fell from 11 to 6 percent, attributable to a decrease from 16 to 7 percent among cruise visitors.

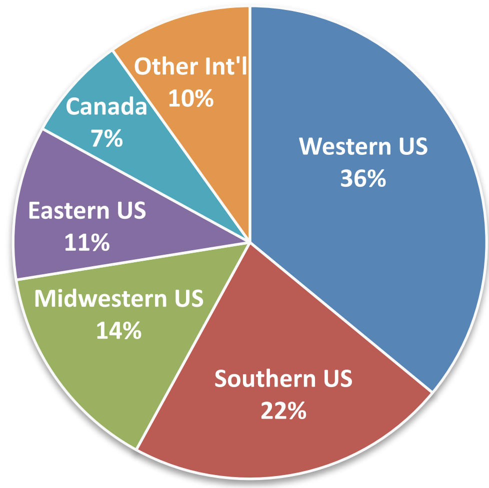
TABLE 4.34 - Other Information Sources
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Friends/family/co-workers	45	50	52	60	43	45	33	34
Cruise line	38	37	5	2	59	62	2	1
Prior experience	26	24	45	35	16	15	17	43
Brochures (net)	25	23	22	22	26	23	32	34
Community brochures	3	3	3	4	1	2	9	6
Ferry brochure/schedule	2	3	2	3	<1	1	10	17
AAA	16	16	12	9	18	20	20	11
Other travel guide/book	13	12	11	11	13	13	20	14
Tour company	n/a	7	n/a	4	n/a	9	n/a	2
Television	11	6	4	5	16	7	5	5
Magazine	8	6	7	7	8	5	8	7
Hotel/lodge	4	5	8	10	2	2	2	4
Milepost	6	5	9	8	1	1	40	33
Convention & Visitors Bureau(s)	5	5	7	5	4	5	16	7
Library	3	4	2	3	4	4	2	6
Newspaper	3	3	4	2	2	3	3	4
North to Alaska guide	2	2	1	2	3	2	4	5
Cell phone apps	n/a	2	n/a	3	n/a	1	n/a	2
Club/organization/church	4	1	4	1	4	1	2	1
Travel/recreation exhibitions	1	1	1	1	1	1	2	1
Other	2	2	3	2	1	2	3	3
None	8	9	10	11	7	9	10	8
Don't know/Refused	1	1	1	1	1	1	4	1

Note: The 2006 source "cruise line/tour company" was separated into two responses in 2011. "Cell phone apps" was added in 2011.

Origin

CHART 4.15 - Visitor Origin, 2011

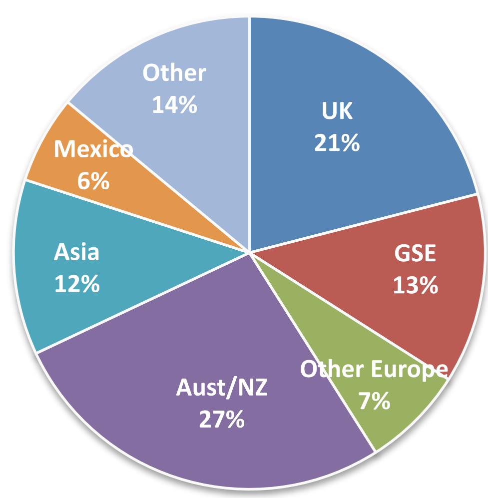


The US accounted for 83 percent of visitors in 2011, while Canada accounted for 7 percent and other international countries accounted for 10 percent. Within the US, the West was by far the most prominent region, representing 36 percent of all visitors – significantly more than the next largest market, the South, at 22 percent. The Midwest accounted for 14 percent, while the East accounted for 11 percent. California was the most commonly mentioned state of origin, followed by Washington, Texas, and Florida. (See table, next page.)

Air visitors were much more likely to be from Western states at 52 percent, compared to 27 percent of both cruise and highway/ferry visitors. While cruise visitors were also most likely to be from the West, they were nearly as likely to be from the South (25 percent). The highway/ferry market was much more likely to be from Canada – 36 percent, including 18 percent from the Yukon.

The proportion of US visitors declined by 2 percent between 2006 and 2011, from 85 to 83 percent, while Canada and Other International each gained 1 percent. Within the US, visitors from the West decreased by 3 percent while visitors from the South increased by 3 percent. The largest shift in origin occurred in the highway/ferry market, where US visitation fell by 13 percent, and Canada visitation increased by 12 percent.

CHART 4.16 – International Visitor Origin, 2011



The chart at right shows how the international (without Canada) market breaks out when based only to international visitors. European visitors represented nearly half (42 percent) of international visitors, including 21 percent from the United Kingdom, 13 percent from German-Speaking Europe, and 7 percent from other European countries. Australia/New Zealand represented 27 percent of visitors.

While the percentage of international visitors increased by only 1 percent compared to 2006, there were shifts for certain markets: Europe's share of the market fell from 63 to 42 percent, while Australia/New Zealand's share increased from 20 to 27 percent and Asia increased from 11 to 12 percent.

Additional details on the international market can be found in the supplemental report, *International Visitors to Alaska, Summer 2011,* available at http://www.dced.stae.ak.us/ded/dev/toubus/home.cfm.

TABLE 4.35 - Origin
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
United States	85	**83**	93	**92**	82	**80**	65	**52**
Western US	39	**36**	54	**52**	31	**27**	32	**27**
California	14	12	15	13	14	12	6	6
Washington	8	9	15	17	5	4	8	7
Oregon	4	3	6	5	2	2	6	3
Colorado	2	3	5	4	1	2	1	2
Arizona	4	2	3	3	4	2	3	2
Idaho	2	2	3	3	1	1	1	2
Southern US	19	**22**	16	**19**	22	**25**	15	**10**
Texas	5	6	4	5	6	7	5	2
Florida	4	4	3	3	5	5	3	2
Midwestern US	13	**14**	12	**13**	14	**16**	14	**11**
Illinois	2	3	1	3	2	4	1	2
Ohio	2	2	1	1	3	3	1	2
Michigan	2	2	1	2	2	2	3	1
Wisconsin	1	2	2	2	1	2	2	2
Minnesota	3	2	4	2	2	2	3	2
Eastern US	13	**11**	10	**9**	16	**12**	4	**5**
Pennsylvania	3	3	2	2	4	3	1	1
New York	2	3	1	2	3	3	1	1
New Jersey	2	2	1	1	2	2	<1	<1
Canada	6	**7**	1	**1**	7	**8**	24	**36**
British Columbia	n/a	3	n/a	<1	n/a	4	n/a	7
Ontario	n/a	2	n/a	<1	n/a	3	n/a	4
Alberta	n/a	1	n/a	<1	n/a	1	n/a	4
Yukon	n/a	1	n/a	0	n/a	0	n/a	18
Other International	9	**10**	6	**6**	11	**12**	11	**12**
Europe	6	4	4	4	7	4	8	10
Australia/New Zealand	2	3	1	1	2	4	2	1
Asia	1	1	1	1	<1	1	<1	<1

Note: US states representing 2 percent or more of all visitors are shown. Canadian provinces with 1 percent or more of all visitors are shown. Canadian provinces were not gathered in 2006.

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.

Party size among summer visitors averaged 2.5 people. Averages ranged from 2.2 among highway/ferry visitors, to 2.3 among air visitors, to 2.6 among cruise visitors. Over half of visitors (57 percent) traveled in parties of two; 16 percent were solo; and 27 percent were in parties of three or more. Air visitors were much more likely than either cruise or highway/ferry visitors to travel solo, and less likely to be traveling in couples.

Party size shifted just slightly between 2006 and 2011, with the average increasing from 2.4 to 2.5. The number of people traveling in parties of three or more increased from 22 to 27 percent. The average size increased for both the air market (from 2.1 to 2.3) and the cruise market (from 2.5 to 2.6) while it fell slightly in the highway/ferry market (from 2.3 to 2.2).

TABLE 4.36 - Party Size
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
One	18	16	39	33	7	6	12	17
Two	60	57	38	39	72	68	66	62
Three	7	9	8	11	5	7	10	11
Four	8	10	9	9	8	11	8	6
Five or more	7	8	6	8	8	8	3	4
Average party size	2.4	**2.5**	2.1	**2.3**	2.5	**2.6**	2.3	**2.2**

The question regarding group size reveals a much higher average group size, at 5.1 people, when compared to party size. The average was much higher among cruise visitors (6.3) when compared with air (3.6) and highway/ferry visitors (2.4). A profile of Group Travelers (visitors traveling in groups of six or more) is provided in the Summary Profiles section.

See table, next page

TABLE 4.37 - Group Size
By Transportation Market, 2006 and 2011 (%)

	All Visitors	Air	Cruise	Hwy/Ferry
One	11	24	2	15
Two	40	32	43	59
Three	8	12	5	11
Four	16	13	19	9
Five	4	5	3	2
Six to ten	13	9	16	4
Eleven or more	8	4	12	<1
Average group size	**5.1**	**3.6**	**6.3**	**2.4**

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

Age and Gender

The gender split among all Alaska visitors was 50/50, with air and highway/ferry visitors more likely to be male (57 and 55 percent, respectively), and cruise visitors more likely to be female (55 percent). The gender breakout for all visitors matched 2006 figures, with very minor shifts by market.

Alaska visitors were most likely to fall into the 55 to 64 year-old age group (28 percent), followed by the over-65 group (24 percent). The average age of Alaska visitors was 50.7 years old, ranging from 47.7 among air visitors, to 51.8 among highway/ferry visitors, to 52.3 among cruise visitors. Average age decreased slightly between 2006 and 2011, by just one year (from 51.6 to 50.7). All three visitor markets saw slight shifts down in average age.

CHART 4.17 - Visitor Age Ranges, 2011

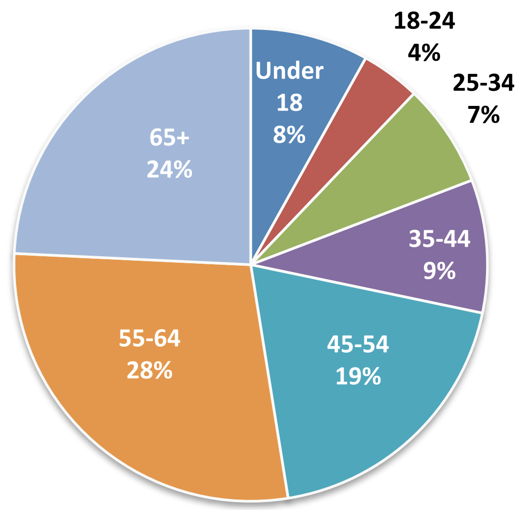


TABLE 4.38 - Age and Gender By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Gender								
Male	50	50	60	57	44	45	53	55
Female	50	50	40	43	56	55	47	45
Age								
Under 18	6	8	7	7	6	9	7	6
18 to 24	3	4	5	5	2	3	4	4
25 to 34	7	7	10	12	6	4	7	10
35 to 44	10	9	15	12	8	8	9	9
45 to 54	22	19	22	21	23	19	15	13
55 to 64	28	28	23	26	31	29	24	28
65 and older	23	24	18	16	25	28	33	29
Average age	**51.6**	**50.7**	**48.0**	**47.7**	**53.3**	**52.3**	**52.5**	**51.8**

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

Household Characteristics

Nearly one-quarter of Alaska visitors (24 percent) reported children in their household. Air visitors were more likely to have children at 28 percent, followed by cruise at 23 percent, then highway/ferry at 15 percent. The proportion of visitors reporting children in the household changed by only 1 percent between 2006 and 2011, for all visitors as well as for each market.

TABLE 4.39 - Children Living In Household
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Children living in household	25	24	29	28	24	23	14	15
No children in household	74	75	71	72	75	77	85	84
Don't know	1	<1	1	<1	1	1	1	<1

Forty-one percent of Alaska visitors reported being retired or semi-retired. Air visitors were much less likely to be retired (28 percent) than either cruise (48 percent) or highway/ferry visitors (53 percent). The retired rate barely increased among the total market, from 39 to 41 percent. Cruise visitors also showed an increase, from 43 to 48 percent, while highway/ferry visitors showed a decline, from 59 to 53 percent.

TABLE 4.40 - Retired or Semi-Retired
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Retired or semi-retired	39	41	29	28	43	48	59	53
Not retired	60	59	70	71	56	52	41	47
Don't know	1	1	<1	<1	1	1	1	<1

Sixty percent of Alaska visitors had earned a Bachelor's degree or higher, with similar rates among the different markets. Educational attainment rates generally matched those of 2006.

TABLE 4.41 - Education
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Grade 11 or less	1	2	1	1	1	2	2	4
High school diploma/GED	13	12	11	10	14	12	18	18
Associate/technical degree	9	8	9	9	8	8	9	10
Some college	18	17	18	17	17	18	21	12
Graduated from college	33	33	33	34	33	32	29	31
Master's/Doctorate	26	27	27	28	26	27	21	24
Don't know	<1	1	<1	1	<1	1	<1	2
Other	n/a	<1	n/a	<1	n/a	<1	n/a	-

Income among summer visitors averaged $107,000, with both air and cruise markets averaging $108,000 and highway/ferry visitors averaging $96,000.

Compared to 2006, average income increased by $4,000 for the overall market (from $103,00 to $107,000). However, after adjusting 2006 income figures for inflation, the average income actually decreased by 9 percent. Among air and cruise visitors, average inflation-adjusted income declined by 10 percent, while it increased by 11 percent among highway/ferry visitors.

TABLE 4.42 - Household Income
By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Less than $25,000	3	3	4	4	2	2	3	3
$25,000 to $50,000	13	10	11	10	12	10	26	11
$50,000 to $75,000	17	15	17	16	16	14	19	14
$75,000 to $100,000	16	16	17	15	15	16	16	19
$100,000 to $125,000	12	11	12	11	13	11	8	10
$125,000 to $150,000	8	9	11	9	8	9	3	8
$150,000 to $200,000	7	8	8	9	7	7	3	6
Over $200,000	8	8	8	9	8	7	3	4
Don’t know/Refused	17	22	13	17	19	24	19	26
Average income	$103,000	**$107,000**	$105,000	**$108,000**	$105,000	**$108,000**	$76,000	**$96,000**

Expenditures Per Person

The following chart shows how much visitors spent on their entire Alaska trip, not including spending on transportation used to enter or exit the state (such as air and ferry tickets) or cruise package spending. Visitors reported spending an average of $941 per person, per trip. Average spending was highest among air visitors at $1,455, followed by highway/ferry visitors at $1,021, then cruise visitors at $632 (not including the cruise or cruise/tour package price).

Average per-person spending was basically flat between 2006 and 2011, increasing by only 0.7 percent, from $934 to $941. Per person, per night spending was also essentially flat (a 0.3 percent decline from $103 to $102).

The air market showed a more pronounced increase (of 6.0 percent) while the cruise spending average was basically flat (down by 0.6 percent). The higher proportion of round trip cruises in 2011 (in comparison to cross-gulf cruises) may in part explain the lack of a natural increase in cruise spending. The highway/ferry market showed a 22 percent decrease in overall spending. However, this is largely due to the shorter average trip length, which fell from 18.8 to 13.2 nights. On a per-night basis, spending among highway/ferry visitors actually increased by 11.0 percent (from $70 to $77).

The slight shifts in average per-trip spending represent decreases in terms of real dollars. Adjusting 2006 spending to 2011 dollars, average per-trip spending decreases by 11 percent. Per-trip spending among air visitors decreased by 7 percent, among cruise visitors by 13 percent, and among highway/ferry visitors by 31 percent.

While some of the decline is likely attributable to economic changes between 2006 and 2011, the slight shift in visitor composition by trip purpose (with slightly fewer vacation/pleasure visitors and slightly more VFRs) is also a factor. VFRs spent 19 percent less than vacation/pleasure visitors on a per-trip, per-person basis. Additional details on spending by trip purpose can be found in the Summary Profiles chapter.

See table next page for more details, including per-person, per-night averages.

CHART 4.18 - Average Per-Person Spending By Transportation Market, 2006 and 2011

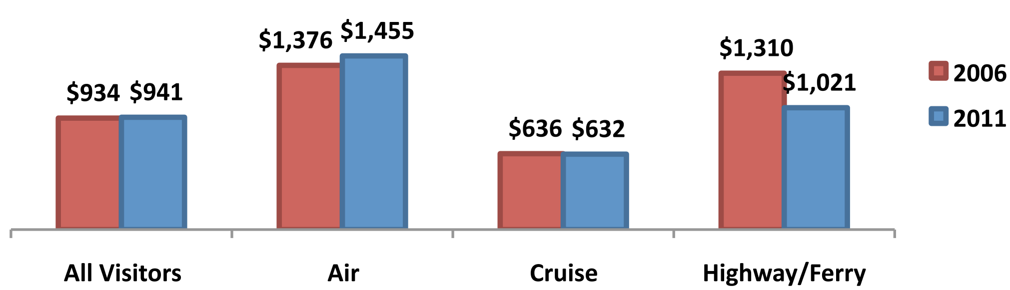


TABLE 4.43 - Visitor Expenditures in Alaska, Per Person, Overall Excluding Transportation to/from Alaska By Transportation Market, 2006 and 2011 (%)

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Less than $500	48	47	35	30	57	58	37	37
$501 - $1,000	21	21	22	20	20	21	23	22
$1,001 - $2,500	15	15	24	25	9	9	23	18
$2,501 - $5,000	4	5	8	11	2	2	8	5
Over $5,000	1	2	3	3	<1	1	2	1
Don't know	10	10	7	11	12	10	6	16
Average per person, per trip	$934	**$941**	$1,376	**$1,455**	$636	**$632**	$1,310	**$1,021**
Average per person, per night	$103	**$102**	$146	**$149**	$79	**$74**	$70	**$77**

Notes: This data is based to intercept respondents only. Online respondents were excluded in both 2006 and 2011. Spending on cruise packages and ferry tickets to enter/exit state is excluded.

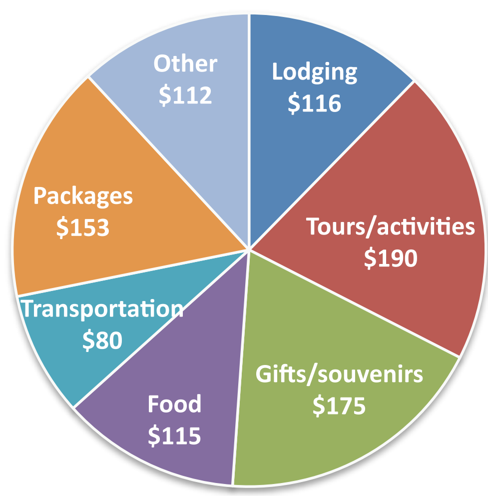
Expenditures By Category

The chart at right and following table provide information on average spending by category.

The category showing the highest average spending was tours/activities/entertainment at $190 per person, followed by gifts/souvenirs/clothing at $175 per person. Visitors spent an average of $153 on overnight packages, not including any cruise or cruise/tours. (Spending by cruise passengers on overnight packages is excluded from these figures.)

Spending varied widely by market, with air visitors reporting much higher spending on lodging ($265, versus $18 among cruise visitors and $211 among highway/ferry visitors).

CHART 4.19 - Average Per-Person Expenditures in Alaska, by Category, 2011



Cruise visitors spent the most on tours ($219, compared to $144 among both air and highway/ferry visitors) and gifts/souvenirs ($220, compared to $108 among air and $92 among highway/ferry).

Average spending by category closely resembles 2006 figures: lodging went from $117 to $116; tours/activities went from $188 to $190; gifts/souvenirs went from $177 to $175; and packages went from $150 to $153. Two categories showed larger increases: food/beverage (from $97 to $115) and cars/fuel/transportation (from $68 to $80).

TABLE 4.44 - Visitor Expenditures in Alaska, Per Person, by Category By Transportation Market, 2006 and 2011

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Lodging	$117	$116	$289	$265	$16	$18	$174	$211
Tours/activities/entertainment	188	190	115	144	237	219	103	144
Gifts/souvenirs/clothing	177	175	114	108	217	220	95	92
Food/beverage	97	115	188	215	40	55	209	162
Cars/fuel/transportation	68	80	157	187	8	11	209	189
Package not including cruise	150	153	453	424	*	0	*	61
Other	n/a	112	n/a	112	n/a	109	n/a	162

Notes: This data is based to intercept respondents only. Online respondents were excluded in both 2006 and 2011. Spending on cruise packages and ferry tickets to enter/exit state is excluded. The "other" category amounts from 2006 are not comparable to 2011 due to a difference in methodology.
* Sample size too small for analysis.

Cruise and ferry passengers were asked additional questions about their respective transportation costs. On average, cruise passengers spent $2,173 per person for their cruise or cruise/tour package (not including airfare). This represents an increase of 15 percent compared to 2006.

Visitors who traveled onboard the Alaska Marine Highway spent an average of $412 per person for their ferry tickets. This includes expenditures on travel to and from Alaska, as well as between communities within the state. The decrease in average spending from $551 in 2006 to $412 in 2011 may be related to the decline in the number of visitors exiting the state by ferry, which fell by 15 percent over that time period. Meanwhile, the percentage of those using the ferry to travel between communities held steady at 3 percent. Visitors using the ferry to travel in and out of the state naturally spend more on ferry passage than those ferrying only between communities.

TABLE 4.45 - Visitor Expenditures on Cruise Package and Ferry Tickets, Per Person, 2006 and 2011

	Cruise Visitors		Ferry Visitors	
	2006	2011	2006	2011
Average per person	$1,897	$2,173	$551	$412

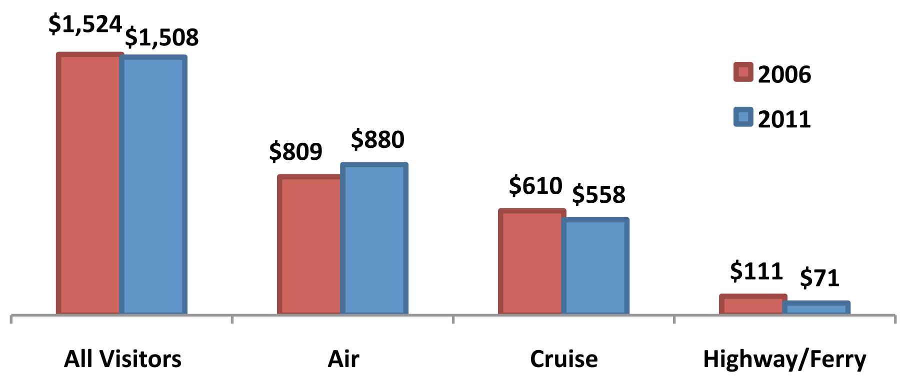
Notes: This data is based to intercept respondents only. Average cruise package price does not include airfare.

Total Expenditures

Visitors' out-of-pocket expenditures totaled $1.51 billion, excluding transportation costs to travel to and from Alaska. That figure includes $880 million in spending by air visitors, $558 million in spending by cruise passengers, and $71 million in spending by highway/ferry visitors. Spending on cruise packages and ferry tickets to enter/exit Alaska are excluded.

Total spending fell by 1 percent between 2006 and 2011. Spending by air visitors increased by 9 percent, while spending by cruise visitors fell by 9 percent, and spending by highway/ferry visitors fell by 36 percent. Adjusting 2006 dollars to 2011 value, total spending fell by 13 percent, including by 4 percent among air visitors, by 19 percent among cruise visitors, and by 44 percent among highway/ferry visitors.

CHART 4.20 - Total Visitor Expenditures in Alaska in Millions of Dollars By Transportation Market, 2006 and 2011



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

The chart at right and the following table shows total spending, by category. Total spending is determined by multiplying average per-person spending to visitor volume, by market, then adding the market totals together.

The tours/activities category represents the largest portion of total spending, at $290 million, followed by gifts/souvenirs at $266 million, packages at $261 million, and lodging at $191 million.

As elsewhere in this chapter, spending on cruise and cruise/tour packages are not included in spending figures. Based on the average per person cruise price of $2,173 and the total cruise passenger volume of 883,000, the cruise market spent approximately $1.9 billion on cruises and cruise/tour packages in 2011 (up from $1.8 billion in 2006).

Chart 4.21 - Total Visitor Expenditures, by Spending Category, 2011

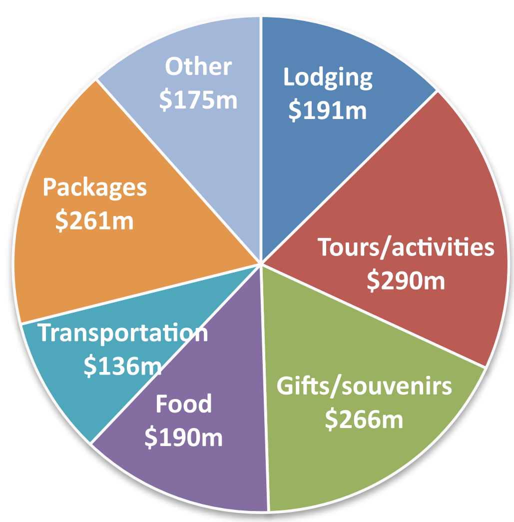


TABLE 4.46 - Total Visitor Expenditures in Alaska, by Category in Millions of Dollars By Transportation Market, 2006 and 2011

	All Visitors		Air		Cruise		Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Lodging	$191	$191	$170	$160	$15	$16	$15	$15
Tours/activities/entertainment	307	290	68	87	227	193	9	10
Gifts/souvenirs/clothing	289	266	67	65	208	194	8	6
Food/beverage	158	190	111	130	38	49	18	11
Cars/fuel/transportation	111	136	92	113	8	10	18	13
Package not including cruise	245	261	266	256	*	-	*	4
Other	n/a	175	n/a	68	n/a	96	n/a	11

Notes: This data is based to intercept respondents only. Online respondents were excluded in both 2006 and 2011 because of difficulty in collecting spending data in the web-based format. Spending on cruise packages and ferry tickets to enter/exit state is excluded. The "other" category amounts from 2006 are not comparable to 2011 due to a difference in methodology.
* Sample size too small for analysis.

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

AVSP VI - Summer 2011

Section V: Summary Profiles

Introduction

This section presents results of the visitor survey broken into 10 "Summary Profiles," representing 48 different sub-groups. Results for each profile are consolidated into tables summarizing survey results. Extra detail is provided in several instances. Because analysis by Trip Purpose is particularly useful, this chapter contains more detail. The Alaska Regions and Communities chapters provide extra details on visitor activities and expenditures in each region and community.

Results for international markets are presented in a separate report, available at

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

The following table shows how the Summary Profiles and their respective sub-groups are presented. Sub-groups and their definitions were determined in consultation with the State of Alaska and the Alaska Travel Industry Association.

TABLE 5.1 - Selected Summary Profiles

Profile	Sub-Groups
Trip Purpose	Vacation/Pleasure, Visiting Friends/Relatives, Business Only or Business/Pleasure
Highway, Ferry, and Campground Users	Highway, Ferry, and Campground Users
US Regions and Canada	Western US, Midwest US, Southern US, Eastern US, Canada
Alaska Regions	Southcentral, Southeast, Interior, Southwest, Far North
Southcentral Communities	Southcentral, Anchorage, Seward, Whittier, Talkeetna, Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, Valdez
Southeast Communities	Southeast, Juneau, Ketchikan, Skagway, Sitka, Prince of Wales Island, Glacier Bay, Haines, Hoonah, Petersburg, Wrangell,
Interior Communities	Interior, Denali, Fairbanks, Tok, Glennallen
Southwest and Far North	Southwest, Kodiak, Far North
Sportfishing	Guided Sportfishing, Unguided Sportfishing
Selected Visitor Markets	Adventure, B&B, Independent Cruisers, Native Culture, Repeat Visitors, Group Travelers

Summary Profile: Trip Purpose

In this chapter, the overall visitor market is examined by trip purpose. Over three-quarters of visitors (77 percent) indicated the primary purpose of their trip was for vacation/pleasure, while 14 percent were visiting friends or relatives (VFRs). The remaining 9 percent travelled for business-related purposes. Definitions for each of these markets and sample sizes are provided in the table below.

TABLE 5.2 - Market Definition and Sample Size
Trip Purpose

Market	Definition	Sample Size	Maximum Margin of Error
Vacation/pleasure	Main purpose of trip is vacation or pleasure	4,827	±1.4%
Visiting friends/ relatives	Main purpose of trip is to visit friends or relatives	1,126	2.9
Business only/ business and pleasure	Main purpose of trip is business only or business and pleasure	794	3.5

Markets defined by trip purpose differ significantly from each other.

- While 83 percent of vacation/pleasure visitors purchased a multi-day package, few VFRs or business travelers purchased tour packages (6 percent and 15 percent, respectively).
- Three-quarters of vacation/pleasure visitors were cruise visitors, 21 percent were air visitors (entered and exited Alaska by air), and 5 percent were highway/ferry visitors (entered or exited the state by highway or ferry). In contrast, the VFR and business markets traveled almost exclusively by air.
- Those traveling for business-related purposes were much more likely to travel between communities by rental vehicle or air, while over half of vacation/pleasure travelers commuted by motorcoach/bus and/or train.
- VFRs reported staying in Alaska longer than those traveling for other purposes, averaging 11.2 nights. Both vacation/pleasure and business travelers stayed an average of 8.9 nights.
- Three-fourths of business travelers stayed in a hotel/motel, compared to just over one-third of vacation/pleasure travelers and just over one-quarter of VFRs. VFRs were much more likely to stay in private homes at 78 percent (compared to 5 percent of vacation/pleasure and 11 percent of business visitors).
- Those traveling for vacation/pleasure were significantly more likely to visit Southeast Alaska (83 percent), compared to 25 percent of business travelers and 17 percent of VFRs. VFRs and business travelers were more likely to visit Southcentral Alaska (81 percent and 72 percent, respectively), versus 49 percent of vacation/pleasure travelers.

- Southcentral was most popular as an overnight destination among all three markets: VFRs (78 percent), business travelers (68 percent), and vacation/pleasure travelers (41 percent). Over one-third of vacation/pleasure travelers overnighted in the Interior, compared to just under one-quarter of VFRs and business travelers.

- Shopping maintains the highest participation rates for activities in the state (excluding obvious visiting friends and family and business activities among those groups), though just 44 percent of business travelers reported shopping, compared to 73 percent of vacation/pleasure travelers and 64 percent of VFRs.

- Vacation/pleasure travelers and VFRs showed similar participation rates in various activities, while participation rates overall were lower among business travelers. However, more than half of VFRs reported hiking/nature walking compared to just over a third of vacation/pleasure travelers.

- Seven out of ten VFRs and business travelers said they are very likely to return to Alaska in the next five years, in contrast to 28 percent of vacation/pleasure travelers. Similarly, two-thirds of VFRs and business travelers have been to Alaska previously, while just 30 percent of vacation/pleasure travelers have prior experience in the state. Among repeat travelers, VFRs have the highest average of previous experience, at 6.6 trips.

- VFRs and business travelers made their decision to come to Alaska, and booked their travel arrangements, much later than vacation/pleasure visitors. For example, 40 percent of VFRs and 39 percent of business travelers booked their trip between April and June of 2011, compared to only 22 percent of vacation/pleasure visitors.

- VFRs were most likely to use the internet to research their trip (84 percent) and to book a portion of their trip online (73 percent). Seventy-one percent of VFRs booked their airfare online, compared to just 51 percent and 38 percent of business and vacation/pleasure travelers, respectively.

- Over half of vacation/pleasure travelers booked a portion of their trip through a travel agent, significantly higher than business travelers and VFRs (29 percent and 7 percent, respectively).

- The western US is the region of origin most largely represented among all groups of travelers, though nearly two-thirds of business travelers and half of VFRs are from the region, in comparison to 30 percent of vacation/pleasure travelers.

- VFRs averaged the lowest group size of 3.2 people, compared to 5.5 people among business and 5.4 people among vacation/pleasure travelers.

- Business travelers reported the highest average annual income of $126,000, versus vacation/pleasure travelers reporting $109,000 and VFRs reporting $86,000.

- Of the three markets, business travelers spent the most on a per-person, per-trip basis, averaging $1,251. This compares to $932 among vacation/pleasure visitors and $783 among VFRs.

- By category, vacation/pleasure visitors spent much more on tours/activities/entertainment, averaging $221 per person (versus $96 among VFRs and $74 among business travelers). Business travelers showed much higher spending on lodging and food/beverage.
- Expanding results to apply to all visitors, vacation/pleasure visitors spent $1.12 billion on their Alaska trips, excluding transportation to enter/exit the state and cruise packages. This compares to $169 million in spending by VFRs and $179 million in spending by business-related travelers.

TABLE 5.3 - Packages
By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Purchased multi-day package				
Yes	66	83	6	15
Type of Package (Base: non-cruise; purchased package)				
Fishing lodge package	44	47	19	26
Wilderness lodge package	16	16	20	14
Adventure tour	13	13	20	6
Motorcoach tour	10	11	5	1
Rail package	9	8	23	7
Rental car/RV package	6	4	10	46
Other	2	1	3	-

TABLE 5.4 - Transportation Modes
By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Transportation Market				
Cruise	57	74	1	12
Air	39	21	94	84
Highway/ferry	4	5	4	3
Used to Travel Between Communities				
Motorcoach/bus	25	31	2	5
Train	22	27	6	4
Rental vehicle	15	12	18	31
Personal vehicle	11	4	52	8
Air	10	8	12	24
State ferry	3	4	4	2
Rental RV	2	2	1	<1
Personal RV	1	1	2	<1

TABLE 5.5 - Length of Stay and Lodging Type By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Average length of stay in Alaska	9.2 nights	8.9 nights	11.2 nights	8.9 nights
Lodging Types Used				
Cruise ship	56	71	1	12
Hotel/motel	38	36	28	74
Lodge	19	23	9	5
Private home	16	5	78	11
Campground/RV	6	6	8	2
B&B	5	5	5	5
Wilderness camping	3	3	5	2
Other	5	4	8	12

TABLE 5.6 - Destinations Visited By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Southeast	**68**	**83**	**17**	**25**
Juneau	61	75	8	19
Ketchikan	58	72	6	16
Skagway	49	63	2	7
Glacier Bay	24	21	2	3
Sitka	10	12	3	9
Hoonah/Icy Strait Point	8	11	1	1
Haines	6	8	2	1
Wrangell	1	1	1	1
Prince of Wales Island	1	1	1	1
Petersburg	1	1	1	1
Other Southeast	3	3	1	1
Southcentral	**56**	**49**	**81**	**72**
Anchorage	49	43	73	69
Kenai Peninsula	30	28	43	23
Seward	22	23	27	14
Kenai/Soldotna	10	8	21	9
Homer	9	9	16	6
Other Kenai Peninsula	4	3	10	3
Whittier	14	16	12	7
Talkeetna	13	15	10	5
Palmer/Wasilla	11	8	25	13
Girdwood/Alyeska	9	6	20	12
Portage	6	5	12	6
Prince William Sound	5	5	4	4
Valdez	4	4	4	2
Other Southcentral	9	7	21	9
Interior	**33**	**35**	**29**	**27**
Denali	28	32	16	10
Fairbanks	21	22	15	23
Tok	4	5	3	2
Glennallen	3	3	4	2
Other Interior	4	4	6	5
Southwest	**4**	**3**	**4**	**7**
Kodiak	2	2	3	4
Other Southwest	2	2	2	3
Far North	**2**	**2**	**1**	**7**
Nome	<1	<1	<1	1
Other Far North	2	1	1	5

TABLE 5.7 - Overnight Destinations By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Southcentral	**49**	**41**	**78**	**68**
Anchorage	39	34	54	61
Kenai Peninsula	18	16	32	13
Seward	10	10	12	5
Kenai/Soldotna	6	5	13	5
Homer	5	5	7	4
Other Kenai Peninsula	3	2	6	1
Talkeetna	7	8	3	1
Palmer/Wasilla	4	3	10	3
Valdez	3	3	3	2
Girdwood/Alyeska	3	3	2	2
Whittier	1	2	1	<1
Portage	1	1	<1	<1
Prince William Sound	<1	<1	<1	1
Other Southcentral	6	5	14	5
Interior	**32**	**35**	**24**	**24**
Denali	26	31	10	5
Fairbanks	20	22	13	21
Tok	4	4	3	1
Glennallen	2	2	2	<1
Other Interior	2	2	3	3
Southeast	**10**	**9**	**14**	**11**
Juneau	3	3	6	7
Skagway	3	3	1	1
Ketchikan	2	2	4	3
Sitka	2	1	2	1
Haines	1	1	1	1
Prince of Wales Island	1	1	1	1
Petersburg	<1	<1	<1	1
Glacier Bay	<1	<1	<1	<1
Wrangell	<1	<1	<1	1
Hoonah/Icy Strait Point	<1	<1	<1	<1
Other Southeast	1	1	1	<1
Southwest	**2**	**2**	**4**	**6**
Kodiak	1	1	3	4
Other Southwest	1	1	1	3
Far North	**1**	**1**	**1**	**6**
Nome	<1	<1	<1	1
Other Far North	1	1	1	6

TABLE 5.8 - Visitor Activities By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Shopping	69	73	64	44
Wildlife viewing	52	54	53	34
Birdwatching	12	12	15	10
Cultural activities	49	53	40	26
Museums	27	29	26	15
Historical/cultural attractions	25	28	22	11
Native cultural tours/activities	17	20	8	9
Gold panning	15	18	6	3
City/sightseeing tours	39	46	14	15
Train	38	47	7	6
White Pass/Yukon Route	26	33	1	2
Alaska Railroad	20	25	6	5
Hiking/nature walk	38	36	52	31
Day cruises	36	37	20	8
Fishing	20	17	37	14
Fishing guided	11	12	11	6
Fishing unguided	10	7	29	9
Visiting friends/relatives	19	7	88	16
Flightseeing	16	19	8	7
Shows/Alaska entertainment	13	15	8	4
Tramway/gondola	12	14	6	4
Salmon bake	10	11	5	5
Dog sledding	9	11	3	1
Camping	7	6	15	5
Kayaking/canoeing	7	8	7	4
Business	7	<1	2	71
Rafting	6	7	4	3
Zipline	5	6	1	1
ATV/4-wheeling	5	5	7	2
Biking	5	4	7	4
Northern Lights viewing	2	2	2	2
Hunting	1	<1	2	<1
Other	4	4	6	3

TABLE 5.9 - Satisfaction Ratings By Trip Purpose (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/ Relatives		Business Only/ Business & Pleasure	
Compared to expectations								
Much higher	26		28		20		23	
Higher	37		37		33		44	
About as expected	34		32		45		32	
Value for the money, compared to other destinations								
Much better	13		13		11		11	
Better	24		24		24		28	
About the same	50		49		51		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)								
Overall experience in Alaska	71	4.7	72	4.7	72	4.7	62	4.6
Friendliness of residents	69	4.6	70	4.7	65	4.6	61	4.5
Sightseeing	67	4.6	67	4.6	70	4.7	65	4.6
Tours and activities	63	4.6	64	4.6	63	4.6	60	4.4
Wildlife viewing	55	4.4	55	4.4	59	4.5	53	4.4
Accommodations	53	4.4	54	4.4	60	4.5	41	4.2
Visitor information services	52	4.4	52	4.4	49	4.4	51	4.4
Transportation within Alaska	47	4.4	50	4.4	42	4.2	35	4.2
Restaurants	37	4.2	36	4.2	40	4.2	38	4.2
Value for the money	32	4.0	33	4.1	32	4.0	25	3.8
Shopping	29	4.0	29	4.0	29	4.1	29	4.0
Very likely to recommend Alaska as a vacation destination	78		79		77		69	
Very likely to return to Alaska in the next five years	38		28		71		70	

TABLE 5.10 - Previous Alaska Travel By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Been to Alaska before for vacation	38	30	67	66
Average # of vacation trips (base: repeat travelers)	5.0	4.8	6.6	3.8
Previous mode of transportation used to enter/exit Alaska				
Air	71	59	91	89
Cruise	29	43	5	10
Highway	9	12	6	4
Ferry	3	4	3	3
Other	1	1	<1	1
Don't know/Refused	1	1	1	2

TABLE 5.11 - Trip Planning
By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Trip Decision – Top Three Periods				
Jan-March 2011	26	25	31	25
Jul-Sept 2010	19	21	14	13
Oct-Dec 2010	18	19	13	10
Trip Booking – Top Three Periods				
Jan-March 2011	30	32	26	12
Apr-June 2011	26	22	40	39
Oct-Dec 2010	17	20	6	5
Internet and Travel Agent Usage				
Used internet	81	81	84	72
Booked over internet	56	53	73	58
Airfare	44	38	71	51
Tours	22	26	8	9
Lodging	19	18	16	34
Cruise	19	23	2	5
Vehicle rental	11	10	13	22
Overnight packages	3	4	1	1
Ferry	2	2	2	1
Used www.travelalaska.com	26	29	18	13
Booked through travel agent	47	56	7	29
Received State Vacation Planner	17	19	11	8

TABLE 5.12 - Additional Trip Planning Sources By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Friends/family	50	45	83	40
Cruise line	37	47	2	8
Prior experience	24	20	41	34
Brochures (net)	23	25	18	17
Community brochures	3	3	4	3
Ferry brochure/schedule	3	3	3	1
AAA	16	18	7	7
Other travel guide/book	12	14	6	4
Tour company	7	9	1	2
Magazine	6	6	7	6
Television	6	7	4	4
Hotel/lodge	5	5	5	12
Milepost	5	5	7	3
Convention & Visitors Bureau(s)	5	5	3	5
Library	4	4	2	1
Newspaper	3	3	2	2
North to Alaska Guide	2	2	2	<1
Cell phone apps	2	2	2	3
Club/organization	1	1	1	4
Travel/recreation exhibits	1	2	1	1
Other	2	2	1	3
None	9	9	6	22
Don't know/Refused	1	1	<1	1

TABLE 5.13 - Demographics
By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Origin				
Western US	36	30	54	62
Southern US	22	23	17	17
Midwestern US	14	15	17	6
Eastern US	11	12	8	6
Canada	7	9	1	4
Other International	10	12	2	5
Other Demographics				
Average party size	2.5	2.6	2.2	1.8
Average group size	5.1	5.4	3.2	5.5
Male/female	50/50	49/51	45/55	64/36
Average age	50.7	51.5	47.5	46.5
Children in household	24	23	23	37
Retired/semi-retired	41	45	36	13
College graduate	60	61	53	68
Average income	$107,000	$109,000	$86,000	$126,000

TABLE 5.14 - Visitor Expenditures in Alaska, Per Person, Overall
Excluding Transportation to/from Alaska
By Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Less than $500	47	48	55	40
$501 - $1,000	21	20	22	26
$1,001 - $2,500	15	14	13	19
$2,501 - $5,000	5	5	2	4
Over $5,000	2	1	1	3
Don't know	10	11	6	7
Average per person, per trip	**$941**	**$932**	**$783**	**$1,251**
Average per person, per night	**$102**	**$105**	**$70**	**$141**

Notes: Spending data is based to intercept respondents only. Excludes spending on cruise or cruise/tour packages and ferry tickets to enter and exit the state.

TABLE 5.15 - Visitor Expenditures in Alaska, Per Person, by Category By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Lodging	$116	$75	$99	$471
Tours/activities/entertainment	190	221	96	74
Gifts/souvenirs/clothing	175	184	111	196
Food/beverage	115	84	189	253
Cars/fuel/transportation	80	64	114	163
Package not including cruise	153	194	16	18
Other	112	110	158	76

Notes: Spending data is based to intercept respondents only. Excludes spending on cruise or cruise/tour packages and ferry tickets to enter and exit the state.

TABLE 5.16 - Total Visitor Expenditures in Alaska in Millions of Dollars By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Total in-state spending	$1,510	$1,117	$169	$179

Notes: Spending data is based to intercept respondents only. Excludes spending on cruise or cruise/tour packages and ferry tickets to enter and exit the state.

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TABLE 5.17 - Total Visitor Expenditures in Alaska, by Category in Millions of Dollars By Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Lodging	$190.9	$89.9	$21.3	$67.3
Tours/activities/entertainment	306.7	264.9	20.7	10.6
Gifts/souvenirs/clothing	288.8	220.6	23.9	28.0
Food/beverage	158.3	100.7	40.7	36.2
Cars/fuel/transportation	110.9	76.7	24.5	23.3
Package not including cruise	244.7	232.5	3.4	2.6
Other	177.8	131.9	34.0	10.9

Notes: Spending data is based to intercept respondents only. Excludes spending on cruise or cruise/tour packages and ferry tickets to enter and exit the state.

Summary Profile: Highway, Ferry, and Campground Users

This chapter profiles the highway, ferry, and campground user markets. Definitions and sample sizes are provided in the table below.

TABLE 5.18 - Market Definition and Sample Size
Highway, Ferry, and Campground Users

Market	Definition	Sample Size	Maximum Margin of Error
Highway	Entered or exited Alaska via highway	502	±4.4
Ferry	Entered or exited Alaska via ferry, or used the ferry to travel between Alaska communities	722	3.5
Campground Users	Spent at least one night in a campground	720	3.5

Characteristics of the highway market differed markedly in several ways from the Alaska visitor market as a whole.

- Highway visitors were significantly less likely to purchase a multi-day package than the average visitor. Just 7 percent reported purchasing a package, versus 66 percent of total Alaska visitors.
- Those travelling via highway stayed in the state somewhat longer than average, with an average length of stay of 12.4 nights, over three nights longer than total visitors (9.2 nights).
- Nearly two-thirds of the highway market visited the Interior during their Alaska stay. Very few highway visitors traveled to Juneau (14 percent) and Ketchikan (8 percent); this compares to 61 percent and 58 percent of the total visitor market, respectively.
- Highway visitors were significantly more likely to stay at a campground or RV park, with over half using these facilities versus 6 percent of total visitors. Additionally, one out of seven (14 percent) highway visitors camped in the Alaska wilderness.
- Just over one-third of highway visitors reported participating in wildlife viewing activities, compared to over half of total visitors. They were also less likely to participate in city/sightseeing tours or ride a train.
- Nearly two-thirds of highway visitors have traveled to Alaska before on vacation, in contrast to just over one-third of total visitors. This group averaged 21.9 previous trips, significantly higher than total repeat visitors which averaged five previous trips. Not surprisingly, half of highway visitors indicated they would likely return to Alaska within the next five years.
- Two out of five highway visitors originated from Canada and nearly one quarter from the Western US.

In this chapter, ferry visitors include not only those that used the Alaska Marine Highway to enter and/or exit Alaska, but also those that used it to travel between communities.

- Similar to highway visitors, those that used the ferry system stayed in Alaska much longer than total visitors, with an average of 13.6 nights in Alaska.
- Four out of five ferry visitors traveled in the Southeast region of Alaska, versus two-thirds of total Alaska visitors.
- Ferry visitors were far more likely to lodge at a hotel or motel (60 percent), in contrast to 38 percent of total visitors.
- Those that used the ferry system were more likely to participate in activities like wildlife viewing and hiking/nature walks compared to total visitors. They were less likely to participate in city/sightseeing tours.
- Nearly half of ferry users reported previous travel to Alaska. That group averaged 4.7 previous trips to the state.
- Almost half of ferry visitors referred to brochures to get information about Alaska, versus less than one-quarter of total visitors.
- The average income among ferry visitors was slightly lower at $99,000, compared to $107,000, among all visitors.

Campground users include anyone that reported spending at least one night in a campground, regardless of mode of travel.

- Campground users stayed in Alaska an average of 15 nights, significantly higher than total visitors. This group was far more likely to visit Southcentral Alaska (87 percent) and the Interior (70 percent). Three-fourths of campground users visited Anchorage, in contrast to just under half of total visitors.
- Campground users were most likely to travel to Alaska by air (59 percent) or highway/ferry (37 percent). Just 4 percent traveled by cruise ship, a sharp contrast to 57 percent of total visitors.
- Campground users were more likely to travel between communities with a personal or rental vehicle or RV.
- Similar to total visitors, two-thirds of campground users participated in shopping. Other popular activities among campground users were wildlife viewing and hiking/nature walks.
- Nearly half of campground users indicated they would be very likely to return to Alaska in the next five years.
- Half of campground users reported previously traveling to Alaska for vacations, with repeat visitors averaging 9 prior trips.
- The average annual income of campground users is $98,000, slightly lower than that of total visitors.

TABLE 5.19 - Trip Purpose and Packages
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Trip Purpose				
Vacation/pleasure	77	82	78	78
Visiting friends or relatives	14	12	18	19
Business	5	3	1	<1
Business and pleasure	4	3	3	3
Purchased multi-day package				
Yes	66	7	30	14
Package type (Base: non-cruise, purchased package)				
Fishing lodge package	44	18	18	17
Wilderness lodge package	16	27	28	20
Adventure tour	13	13	18	30
Motorcoach tour	10	4	15	4
Rail package	9	16	7	10
Rental car/RV package	6	22	13	15
Other	2	1	1	3

TABLE 5.20 - Transportation Modes
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Transportation Market				
Cruise	57	2	18	4
Air	39	-	40	59
Highway/ferry	4	98	42	37
Used to Travel Between Communities				
Motorcoach/bus	25	4	20	7
Train	22	5	16	8
Rental vehicle	15	7	22	18
Personal vehicle	11	36	23	28
Air	10	3	21	9
State ferry	3	21	88	12
Rental RV	2	5	5	27
Personal RV	1	23	7	22

TABLE 5.21 - Length of Stay, Destinations and Lodging Type
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Average length of stay in Alaska	9.2 nights	12.4 nights	13.6 nights	15.0 nights
Regions Visited				
Southeast	68	58	82	33
Southcentral	56	56	55	87
Interior	33	62	49	70
Southwest	4	2	4	3
Far North	2	5	3	6
Destinations Visited, Top 10				
Juneau	61	14	52	12
Ketchikan	58	8	40	7
Anchorage	49	42	52	75
Skagway	49	45	46	18
Denali	28	31	37	51
Glacier Bay	24	1	12	4
Seward	22	28	29	54
Fairbanks	21	37	30	38
Whittier	14	12	21	20
Talkeetna	13	10	9	27
Lodging Types Used				
Cruise ship	56	2	13	4
Hotel/motel	38	36	60	30
Lodge	19	7	22	7
Private home	16	17	25	28
Campground/RV	6	53	21	100
B&B	5	6	16	7
Wilderness camping	3	14	9	14
Other	5	8	11	8

TABLE 5.22 - Visitor Activities – Top 10
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Shopping	69	64	66	67
Wildlife viewing	52	37	67	62
City/sightseeing tours	39	13	29	19
Train	38	14	24	15
Hiking/nature walk	38	30	54	56
Day cruises	36	31	35	39
Museums	27	31	44	36
Historical/cultural attractions	25	18	32	27
Fishing	20	24	25	41
Visiting friends/relatives	19	22	31	33

TABLE 5.23 - Satisfaction Ratings
Highway, Ferry, and Campground Users (%)

	All Visitors		Highway		Ferry		Campground Users	
Compared to expectations								
Much higher	26		19		28		22	
Higher	37		32		38		41	
About as expected	34		46		31		33	
Value for the money, compared to other destinations								
Much better	13		9		12		9	
Better	24		21		28		25	
About the same	50		50		42		44	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)								
Overall experience in Alaska	71	4.7	61	4.6	74	4.7	71	4.7
Friendliness of residents	69	4.6	72	4.7	74	4.7	70	4.7
Sightseeing	67	4.6	68	4.7	75	4.7	68	4.7
Tours and activities	63	4.6	65	4.6	66	4.6	65	4.6
Wildlife viewing	55	4.4	62	4.5	71	4.7	63	4.5
Accommodations	53	4.4	44	4.3	41	4.2	42	4.3
Visitor information services	52	4.4	67	4.6	51	4.4	60	4.5
Transportation within Alaska	47	4.4	49	4.4	52	4.4	43	4.3
Restaurants	37	4.2	34	4.2	26	4.0	32	4.1
Value for the money	32	4.0	39	4.2	32	3.9	29	4.0
Shopping	29	4.0	30	4.1	22	3.9	25	4.0
Very likely to recommend Alaska as a vacation destination	78		79		82		79	
Very likely to return to Alaska in the next five years	38		50		40		49	

TABLE 5.24 - Previous Alaska Travel
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Been to Alaska before for vacation	38	63	48	50
Average # of vacation trips (base: repeat travelers)	5.0	21.9	4.7	9.0
Previous mode of transportation used to enter/exit Alaska				
Air	71	29	65	59
Cruise	29	7	13	10
Highway	9	64	18	33
Ferry	3	6	16	5

TABLE 5.25 - Trip Planning
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Trip Decision – Top Three Periods				
Jan-March 2011	26	19	23	23
Jul-Sept 2010	19	22	18	20
Oct-Dec 2010	18	12	17	14
Trip Booking – Top Three Periods				
Jan-March 2011	30	25	31	29
Apr-June 2011	26	31	28	32
Oct-Dec 2010	17	11	13	17
Internet and Travel Agent Usage				
Used internet	81	65	88	84
Booked over internet	56	32	66	59
Booked through travel agent	47	8	24	14
Other Sources – Top 10				
Friends/family	50	32	47	52
Cruise line	37	3	13	3
Prior experience	24	44	31	35
Brochures	23	29	47	38
AAA	16	10	16	12
Travel/guide book	12	13	18	23
Tour company	7	1	5	3
Television	6	5	6	7
Magazine	6	7	8	12
Hotel/lodge	5	3	7	6

TABLE 5.26 - Demographics
Highway, Ferry, and Campground Users (%)

	All Visitors	Highway	Ferry	Campground Users
Origin				
Western US	36	23	31	37
Southern US	22	10	19	14
Midwestern US	14	10	14	16
Eastern US	11	4	9	8
Canada	7	40	9	12
Other International	10	13	17	13
Other Demographics				
Average party size	2.5	2.2	2.4	2.7
Average group size	5.1	2.4	3.2	3.4
Male/female	50/50	55/45	51/49	53/47
Average age	50.7	51.6	51.2	45.4
Children in household	24	15	20	25
Retired/semi-retired	41	54	37	36
College graduate	60	53	62	60
Average income	$107,000	$99,000	$99,000	$98,000

Summary Profile: US Regions & Canada

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

TABLE 5.27 - Market Definition and Sample Size
US Regions & Canada

Market	Definition	Sample Size	Maximum Margin of Error
Western US	From Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, or Wyoming	2,490	±2.0%
Midwest US	From Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, or Wisconsin	800	3.5
Southern US	From Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, or Virginia, or West Virginia	1,199	2.8
Eastern US	From Connecticut, Delaware, Maine, Massachusetts, Maryland, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, or Washington, D.C	595	4.0
Canada	From Canada	442	4.7

Making up the largest group of North American travelers, those from Western US states differed somewhat from other regions of the US and Canada.

- Compared to those from other regions, Western US visitors were less likely to travel to Alaska for vacation or pleasure, and more likely to travel for the purpose of visiting friends/relatives or for business. The higher VFR rate is reflected in a higher likelihood of staying in private homes.
- Over half of Western US visitors traveled to and from the state by air, versus approximately one-third of visitors from other regions of the US. Two-thirds of visitors from other US regions traveled by cruise, in contrast to just 44 percent of Western US visitors.
- While Western US visitors were less likely to purchase a multi-day package than those from other regions (52 percent vs. 66 percent of total visitors), those that did purchased fishing lodge packages at a higher rate.
- They were much more likely to book their trip between April and June 2011 than the overall visitor market (31 percent vs. 26 percent). Further they were more likely to book travel arrangements online (61 percent) than visitors from other North American regions.

- More than half from this region had been to Alaska for vacation previously (55 percent), compared to 38 percent of visitors overall. Similarly, more than half said they were very likely to return to the state in the next five years.

The Midwest market differed in some ways from overall Alaska visitation.

- More than one-third traveled between communities by motorcoach/bus and/or train, compared to one-quarter of total visitors.
- Midwest visitors reported generally higher participation rates in activities than overall visitors and reported the highest participation rates in wildlife viewing compared to other regions.
- Visitors from this region reported the highest visitation to Southcentral Alaska.
- Midwestern US visitors had the longest length of stay with an average of 9.8 nights.
- The region produced the highest travel group size with an average of 6 people per group.

Southern US visitors were the second largest group and showed some differences compared to total visitors and other regions.

- Southern visitors reported the highest participation in shopping and day cruises compared to other regions (77 percent and 40 percent, respectively).
- Visitors from this region reported the highest annual income compared to their North American counterparts, at an average of $112,000.

Eastern US visitors represented the smallest group from the US and had some noticeable differences.

- Nearly three-fourths of visitors from this region purchased a multi-day package. Non-cruise visitors from eastern US were more likely to purchase fishing lodge, wilderness lodge, and adventure tour packages.
- They were the most likely to partake in historical/cultural attractions compared to other regions, with one out of three reporting participation.
- Eastern US visitors are most likely to recommend Alaska as a vacation destination with 84 percent saying they are very likely.
- This region reported the lowest rate of previous vacations in Alaska, with just 29 percent reporting prior trips.
- Eastern US visitors were less likely to decide on their trip in the latter half of 2010, than were visitors from other regions.

Canadian visitors, though smallest in numbers among North American visitors, reported markedly different travel characteristics.

- The vast majority of Canadian visitors traveled to Alaska for the purpose of vacation/pleasure (92 percent).
- Seven out of ten Canadian visitors traveled by cruise ship, the highest among North American travelers. Nearly one-quarter traveled by highway or ferry, also much higher than any US region. They were less likely to travel by air at 7 percent.
- Canadians were more likely to visit the Southeast regions compared to total visitors (87 percent vs. 68 percent), but were less likely to visit the Southcentral or Interior regions.
- Canadian visitors reported the shortest average length of stay in the state, at 7 nights.
- They were the least likely to use the internet compared to other regions. While 70 percent used the internet to research their vacation, just 38 percent used this resource to book a portion of their trip.

TABLE 5.28 - Trip Purpose and Packages
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Trip Purpose						
Vacation/pleasure	77	64	80	81	85	92
Visiting friends/rel.	14	21	16	11	10	3
Business only	5	10	2	4	3	4
Business/pleasure	4	6	2	4	2	2
Purchased multi-day package						
Yes	66	52	71	73	73	71
Package type (Base: non-cruise, purchased package)						
Fishing lodge	44	64	35	32	35	59
Wilderness lodge	16	7	22	24	25	9
Adventure tour	13	12	14	14	16	14
Motorcoach tour	10	3	12	11	3	14
Rail package	9	8	10	12	12	1
Rental car/RV package	6	5	5	5	5	3
Other	2	1	2	2	4	-

TABLE 5.29 - Transportation Modes
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Transportation Market						
Cruise	57	44	64	66	67	70
Air	39	53	32	32	31	7
Highway/ferry	4	4	3	2	2	23
Used to Travel Between Communities						
Motorcoach/bus	25	14	37	28	36	24
Train	22	12	35	25	35	18
Rental vehicle	15	17	15	17	14	3
Personal vehicle	11	15	13	9	9	6
Air	10	12	9	9	11	6
State ferry	3	3	4	3	3	4
Rental RV	2	2	2	1	2	<1
Personal RV	1	2	2	1	<1	3

TABLE 5.30 - Length of Stay, Destinations and Lodging Type US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average length of stay in Alaska	9.2 nights	8.9 nights	9.8 nights	9.4 nights	9.4 nights	7.0 nights
Regions Visited						
Southeast	68	57	70	71	73	87
Southcentral	56	55	66	57	63	34
Interior	33	25	45	36	45	26
Southwest	4	5	3	3	4	1
Far North	2	2	2	2	2	2
Destinations Visited, Top 10						
Juneau	61	48	64	68	66	69
Ketchikan	58	45	60	65	65	67
Skagway	49	33	54	58	59	61
Anchorage	49	50	59	51	55	27
Denali	28	18	40	32	41	20
Glacier Bay	24	11	20	16	24	18
Seward	22	19	29	24	24	18
Fairbanks	21	13	31	23	31	18
Whittier	14	10	20	17	19	10
Talkeetna	13	9	18	16	19	10
Lodging Types Used						
Cruise ship	56	42	60	64	64	65
Hotel/motel	38	36	45	39	44	27
Lodge	19	15	27	21	28	13
Private home	16	24	17	12	12	3
Campground/RV	6	6	6	4	5	10
B&B	5	5	4	5	5	3
Wilderness camping	3	3	3	2	2	2
Other	5	7	5	5	6	4

TABLE 5.31 - Activities – Top 10 US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Shopping	69	62	73	77	73	72
Wildlife viewing	52	46	63	59	58	35
City/sightseeing tours	39	29	43	42	50	43
Train	38	25	48	46	48	36
Hiking/nature walk	38	38	45	39	45	25
Day cruises	36	22	39	40	39	20
Museums	27	23	30	30	26	27
Historical/cultural attractions	25	21	30	25	32	22
Fishing	20	26	22	18	18	7
Visiting friends/relatives	19	28	21	17	14	5

TABLE 5.32 - Satisfaction Ratings US Regions & Canada (%)

	All Visitors		Western US		Midwest US		Southern US		Eastern US		Canada	
Compared to expectations												
Much higher	26		21		31		30		35		23	
Higher	37		37		39		40		35		28	
About as expected	34		39		28		27		29		46	
Value for the money, compared to other destinations												
Much better	13		13		13		12		13		13	
Better	24		24		24		27		22		23	
About the same	50		48		50		47		53		51	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	71	4.7	68	4.6	76	4.7	77	4.7	75	4.7	57	4.5
Friendliness of residents	69	4.6	66	4.6	71	4.7	74	4.7	73	4.7	64	4.5
Sightseeing	67	4.6	66	4.6	72	4.7	70	4.7	72	4.7	60	4.6
Tours and activities	63	4.6	64	4.6	67	4.6	66	4.6	68	4.6	58	4.5
Wildlife viewing	55	4.4	52	4.4	56	4.4	59	4.4	60	4.4	53	4.4
Accommodations	53	4.4	52	4.4	59	4.5	53	4.4	57	4.5	51	4.4
Visitor information services	52	4.4	49	4.4	54	4.4	53	4.4	53	4.4	54	4.5
Transportation within Alaska	47	4.4	42	4.3	54	4.5	52	4.4	51	4.4	52	4.5
Restaurants	37	4.2	36	4.2	41	4.3	37	4.2	36	4.2	36	4.2
Value for the money	32	4.0	31	4.0	33	4.0	35	4.1	30	4.0	33	4.1
Shopping	29	4.0	27	4.0	34	4.1	33	4.1	28	4.0	28	3.9
Very likely to recommend Alaska as a vacation destination	78		76		81		81		84		70	
Very likely to return to Alaska in the next five years	38		52		30		34		30		34	

TABLE 5.33 - Previous Alaska Travel US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Been to Alaska before for vacation	38	55	30	32	29	41
Average # of vacation trips (base: repeaters)	5.0	4.3	3.9	3.3	2.9	17.5
Previous mode of transportation used to enter/exit Alaska						
Air	71	78	76	74	74	13
Cruise	29	22	31	37	41	40
Highway	9	6	6	5	5	45
Ferry	3	4	2	3	1	3

TABLE 5.34 - US Regions and Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Trip Decision – Top Three Periods						
Jan-March 2011	26	25	26	25	25	26
Jul-Sept 2010	19	18	23	19	24	15
Oct-Dec 2010	18	17	20	19	16	17
Trip Booking – Top Three Periods						
Jan-March 2011	30	26	34	33	28	28
Apr-June 2011	26	31	23	21	22	30
Oct-Dec 2010	17	14	18	18	21	16
Internet and Travel Agent Usage						
Used internet	81	80	81	86	86	70
Booked over internet	56	61	58	58	56	38
Booked through travel agent	47	34	51	46	56	52
Other Sources – Top 10						
Friends/family	50	54	55	50	47	37
Cruise line	37	28	42	42	44	44
Prior experience	24	32	20	22	19	27
Brochures	23	20	25	21	19	26
AAA	16	15	21	16	25	10
Travel/guide book	12	9	14	12	14	12
Tour company	7	4	9	8	8	6
Television	6	4	5	7	6	5
Magazine	6	6	5	5	4	6
Hotel/lodge	5	6	4	5	6	4

TABLE 5.35 - Demographics US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average party size	2.5	2.4	2.6	2.5	2.4	2.5
Average group size	5.1	4.8	6.0	5.1	4.3	3.9
Male/female	50/50	52/48	47/53	48/52	48/52	50/50
Average age	50.7	49.7	50.0	52.0	51.1	52.5
Children in household	24	25	25	22	25	24
Retired/semi-retired	41	38	40	44	38	50
College graduate	60	58	60	64	65	54
Average income	$107,000	$105,000	$106,000	$112,000	$110,000	$108,000

Summary Profile: Alaska Regions

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

TABLE 5.36 - Market Definition and Sample Size
Alaska Regions

Market	Definition	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	4,082	±1.5%
Southeast	Visited at least one destination in the Southeast region, day and/or overnight	4,044	1.5
Interior	Visited at least one destination in the Interior region, day and/or overnight	2,896	1.8
Southwest	Visited at least one destination in the Southwest region, day and/or overnight	268	6.0
Far North	Visited at least one destination in the Far North region, day and/or overnight	177	7.4

Alaska Regions

TABLE 5.37 - Trip Purpose and Packages
By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Trip Purpose						
Vacation/pleasure	77	68	93	80	66	60
Visiting friends/rel.	14	20	4	12	16	7
Business only	5	7	1	4	12	20
Business/pleasure	4	4	2	3	6	12
Purchased multi-day package						
Yes	66	52	88	62	51	43
Package type (Base: non-cruise, purchased package)						
Fishing lodge	44	34	65	9	59	19
Wilderness lodge	16	18	15	27	19	27
Adventure tour	13	15	8	19	13	16
Motorcoach tour	10	13	4	20	2	22
Rail package	9	11	4	16	4	-
Rental car/RV package	6	7	4	8	1	3
Other	2	1	1	2	1	13

TABLE 5.38 - Transportation Modes
By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Transportation Market						
Cruise	57	43	85	52	30	27
Air	39	53	11	40	67	62
Highway/ferry	4	4	4	8	3	11
Used to Travel Between Communities						
Motorcoach/bus	25	37	33	54	11	35
Train	22	36	28	54	11	32
Rental vehicle	15	25	6	24	21	24
Personal vehicle	11	18	3	13	10	11
Air	10	14	7	14	48	59
State ferry	3	4	4	5	4	5
Rental RV	2	3	1	4	<1	4
Personal RV	1	2	1	4	2	5

TABLE 5.39 - Length of Stay, Destinations and Lodging Type By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Average length of stay in Alaska	9.2 nights	10.9 nights	8.7 nights	12.0 nights	13.3 nights	13.5 nights
Regions Visited						
Southeast	68	49	100	60	38	36
Southcentral	56	100	40	92	84	87
Interior	33	55	30	100	25	67
Southwest	4	5	2	3	100	8
Far North	2	3	1	4	4	100
Destinations Visited, Top 10						
Juneau	61	43	89	52	33	33
Ketchikan	58	42	84	50	32	30
Skagway	49	39	72	51	9	33
Anchorage	49	89	34	80	83	82
Denali	28	48	28	84	19	51
Glacier Bay	24	16	25	22	8	19
Seward	22	40	17	40	16	33
Fairbanks	21	33	20	63	12	63
Whittier	14	26	14	31	14	24
Talkeetna	13	23	12	34	12	24
Lodging Types Used						
Cruise ship	56	42	81	50	30	27
Hotel/motel	38	61	31	71	49	79
Lodge	19	31	20	46	28	33
Private home	16	23	5	15	22	12
Campground/RV	6	9	3	12	4	17
B&B	5	7	3	8	9	8
Wilderness camping	3	4	1	5	8	10
Other	5	8	3	7	15	19

TABLE 5.40 - Activities – Top 10 By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Shopping	69	70	74	75	57	62
Wildlife viewing	52	63	52	72	64	64
City/sightseeing tours	39	38	48	46	31	43
Train	38	42	51	58	19	36
Hiking/nature walk	38	48	34	51	55	57
Day cruises	36	39	34	49	31	33
Museums	27	34	28	42	30	42
Historical/cultural attractions	25	29	28	37	27	33
Fishing	20	25	12	17	42	16
Visiting friends/relatives	19	28	7	21	25	16

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

TABLE 5.41 - Satisfaction Ratings By Region (%)

	All Visitors		South-central		Southeast		Interior		Southwest		Far North	
Compared to expectations												
Much higher	26		27		28		30		23		37	
Higher	37		38		37		40		40		28	
About as expected	34		31		32		27		34		33	
Value for the money, compared to other destinations												
Much better	13		12		13		11		11		14	
Better	24		24		25		24		28		17	
About the same	50		48		51		47		43		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	71	4.7	72	4.7	72	4.7	74	4.7	69	4.6	66	4.6
Friendliness of residents	69	4.6	69	4.6	72	4.7	71	4.7	69	4.6	69	4.6
Sightseeing	67	4.6	69	4.7	67	4.6	71	4.7	61	4.5	67	4.7
Tours and activities	63	4.6	64	4.6	64	4.6	65	4.6	59	4.5	62	4.5
Wildlife viewing	55	4.4	57	4.4	55	4.3	58	4.4	58	4.5	60	4.5
Accommodations	53	4.4	50	4.4	57	4.5	48	4.4	35	4.2	30	4.1
Visitor info. services	52	4.4	53	4.4	52	4.4	55	4.5	48	4.3	57	4.5
Transportation within Alaska	47	4.4	50	4.4	51	4.4	54	4.5	37	4.2	44	4.4
Restaurants	37	4.2	37	4.2	37	4.2	34	4.2	23	4.0	23	4.0
Value for the money	32	4.0	29	4.0	34	4.1	29	4.0	31	4.0	28	3.9
Shopping	29	4.0	29	4.0	30	4.0	28	4.0	25	3.9	28	4.0
Very likely to recommend Alaska as a vacation destination	78		77		79		78		82		70	
Very likely to return to Alaska in the next five years	38		42		27		30		58		44	

TABLE 5.42 - Previous Alaska Travel By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Been to Alaska before for vacation	38	42	29	32	60	43
Average # of vacation trips (base: repeaters)	5.0	4.3	5.2	2.9	6.0	3.4
Previous mode of transportation used to enter/exit Alaska						
Air	71	82	56	74	81	80
Cruise	29	22	48	26	24	16
Highway	9	7	11	11	6	9
Ferry	3	3	4	4	3	4

TABLE 5.43 - Trip Planning
By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Trip Decision – Top Three Periods						
Jan-March 2011	26	26	24	25	23	25
Jul-Sept 2010	19	19	21	19	14	19
Oct-Dec 2010	18	17	19	19	13	11
Trip Decision – Top Three Periods						
Jan-March 2011	30	30	32	32	29	28
Apr-June 2011	26	28	21	23	38	32
Oct-Dec 2010	17	16	20	20	10	14
Internet and Travel Agent Usage						
Used internet	81	83	80	82	85	87
Booked over internet	56	60	50	55	64	57
Booked through travel agent	47	42	60	52	33	41
Other Sources – Top 10						
Friends/family	50	54	46	52	51	43
Cruise line	37	28	53	34	19	18
Prior experience	24	26	19	21	38	24
Brochures	23	26	24	30	16	28
AAA	16	18	19	23	19	16
Travel/guide book	12	15	13	20	11	17
Tour company	7	9	9	12	5	14
Television	6	6	7	7	5	11
Magazine	6	7	6	8	6	7
Hotel/lodge	5	7	4	7	10	8

TABLE 5.44 - Demographics
By Region (%)

	All Visitors	South-central	Southeast	Interior	Southwest	Far North
Origin						
Western US	36	35	30	27	46	30
Southern US	22	22	23	23	22	26
Midwestern US	14	18	15	21	9	16
Eastern US	11	12	11	14	11	10
Other International	10	9	12	10	11	11
Canada	7	4	9	6	2	7
Other Demographics						
Average party size	2.5	2.4	2.6	2.4	2.3	2.1
Average group size	5.1	4.5	5.9	5.1	3.5	2.8
Male/female	50/50	51/49	47/53	49/51	61/39	57/43
Average age	50.7	50.7	51.8	52.0	52.4	50.4
Children in household	24	24	23	20	19	27
Retired/semi-retired	41	40	45	45	40	34
College graduate	60	61	60	62	61	61
Average income	$107,000	$108,000	$108,000	$104,000	$117,000	$117,000

Summary Profile: Southcentral Communities

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

TABLE 5.45 - Market Definition and Sample Size
Southcentral Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	4,082	±1.5%
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	3,580	1.6
Seward	Visited Seward, day and/or overnight	1,786	2.3
Whittier	Visited Whittier, day and/or overnight	1,075	3.0
Talkeetna	Visited Talkeetna, day and/or overnight	1,096	3.0
Kenai/Soldotna	Visited Kenai or Soldotna, day and/or overnight	904	3.3
Homer	Visited Homer or Seldovia, day and/or overnight	832	3.4
Palmer/Wasilla	Visited Palmer or Wasilla, day and/or overnight	881	3.3
Girdwood	Visited Girdwood or Alyeska, day and/or overnight	743	3.6
Valdez	Visited Valdez, day and/or overnight	499	4.4

Southcentral Alaska visitors differed from the overall Alaska visitor market in a few ways.

- More than half traveled to or from the state by air, in contrast to just over one-third of total visitors.
- The Southcentral visitor market was more likely to travel between communities by motorcoach/bus, train, rental vehicle, or personal vehicle than the overall visitor market.
- They reported a longer average trip of 10.9 nights, compared to an average of 9.2 nights reported by total visitors. Southcentral visitors were less likely to visit the Southeast region than overall visitors (49 percent vs. 68 percent) but were more likely to visit the Interior (55 percent vs. 33 percent).
- Southcentral visitors were much more likely to stay in a hotel/motel or lodge on their visit compared to the total visitor market.
- Activity participation was generally reflective of the total market, though Southcentral visitors were somewhat more likely to participate in hiking/nature walking and to visit friends or relatives. Wildlife viewing was the most popular activity in the Southcentral region (46 percent).

- Similar to the total visitor market, more than one-quarter of Southcentral visitors decided on their 2011 Alaska trip between January and March 2011, and one out of ten between July and September of 2010. Nearly one-third booked arrangements between January and March 2010, while over one out of four booked between April and June 2011.

- Average total expenditures for Southcentral visitors were $545 within the region, with the highest expenditures going to lodging, food/beverages, and rental cars/fuel/transportation.

Visitors to communities within the Southcentral region reported some distinctive characteristics.

- Visitors to Talkeetna, Whittier, Valdez, and Seward were more likely to be traveling with the purpose of vacation/pleasure, than were visitors to other Southcentral communities. One-third of Palmer/Wasilla visitors were VFRs, the highest among Southcentral communities.

- Visitors to Valdez reported the longest trip duration of 15.5 nights, compared to an average of 10.9 nights for the region.

- Those that visited Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were significantly less likely to travel by cruise ship as part of their Alaska trip.

- Southcentral visitors to Whittier and Talkeetna were the most likely to have purchased a multi-day package. More than half of visitors to these towns reported traveling between communities by motorcoach/bus or train.

- Day cruises and wildlife viewing were the most popular activities in Seward and Whittier, with somewhat higher participation rates than other communities. Half of visitors to Kenai/Soldotna participated in fishing activities, in contrast to just 25 percent for total Southcentral visitors.

- Homer, Palmer/Wasilla, and Girdwood reported the highest number of repeat visitors (49 percent, 48 percent, and 47 percent, respectively), compared to other communities in the region.

- While more than eight out of ten visitors to all Southcentral communities reporting using the internet to research their trip, visitors to Kenai/Soldotna, Palmer/Wasilla, and Girdwood were the most likely to book online. Visitors to Kenai/Soldotna, Homer, Palmer/Wasilla, Girdwood, and Valdez were much less likely to book through a travel agent.

- Visitors to Palmer/Wasilla reported an average annual income of $98,000, in contrast to $108,000 average for the region with similar figures across the other communities.

- Visitors to Southcentral spent an average of $1,193 on their entire Alaska trip.

- Anchorage had the highest expenditures among Southcentral communities with an average of $407 per person spent in Anchorage, while lowest expenditures were in Whittier with an average of $28 per person spent in Whittier.

- Highest expenditures on tours/activities/entertainment were in Homer with an average of $87. Anchorage saw the highest expenditures on rental cars/fuel/transportation with an average of $111.

TABLE 5.46 - Trip Purpose and Packages Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Trip Purpose						
Vacation/pleasure	77	68	67	78	84	89
Visiting friends/rel.	14	20	20	16	12	11
Business only	5	7	8	2	1	1
Business/pleasure	4	4	5	4	4	2
Purchased multi-day package						
Yes	66	52	51	55	70	66
Package type (Base: non-cruise, purchased package)						
Fishing lodge	44	34	33	22	9	8
Wilderness lodge	16	18	18	24	25	25
Adventure tour	13	15	15	16	19	23
Motorcoach tour	10	13	13	14	17	13
Rail package	9	11	12	16	17	17
Rental car/RV package	6	7	7	7	12	11
Other	2	1	1	2	2	2

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Purpose					
Vacation/pleasure	63	70	56	56	79
Visiting friends/rel.	28	24	33	31	16
Business only	3	2	6	4	2
Business/pleasure	5	4	5	9	2
Purchased multi-day package					
Yes	31	33	27	30	27
Package type (Base: non-cruise, purchased package)					
Fishing lodge	45	45	13	15	10
Wilderness lodge	17	17	21	19	20
Adventure tour	12	14	22	17	26
Motorcoach tour	6	7	13	16	32
Rail package	8	7	13	20	2
Rental car/RV package	9	7	14	14	7
Other	3	2	4	-	3

TABLE 5.47 - Transportation Modes
Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Transportation Market						
Cruise	57	43	41	43	63	56
Air	39	53	55	51	33	41
Highway/ferry	4	4	4	6	4	4
Used to Travel Between Communities						
Motorcoach/bus	25	37	36	37	52	57
Train	22	36	35	40	50	56
Rental vehicle	15	25	26	34	24	28
Personal vehicle	11	18	18	17	13	11
Air	10	14	15	11	8	9
State ferry	3	4	4	5	5	2
Rental RV	2	3	3	5	4	6
Personal RV	1	2	2	4	2	2

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Transportation Market					
Cruise	14	17	17	17	9
Air	77	71	72	79	67
Highway/ferry	9	11	10	4	24
Used to Travel Between Communities					
Motorcoach/bus	15	9	17	21	22
Train	15	9	17	26	15
Rental vehicle	43	41	42	45	32
Personal vehicle	32	29	32	31	25
Air	15	14	8	11	13
State ferry	6	7	5	4	23
Rental RV	10	10	8	6	17
Personal RV	6	6	5	2	10

TABLE 5.48 - Length of Stay, Destinations and Lodging Type Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Average length of stay in Alaska	9.2 nights	10.9 nights	10.8 nights	11.7 nights	11.6 nights	12.5 nights
Regions Visited						
Southeast	68	49	47	51	68	62
Southcentral	56	100	100	100	100	100
Interior	33	55	54	60	71	87
Southwest	4	5	6	3	4	3
Far North	2	3	3	3	3	4
Destinations Visited, Top 10						
Juneau	61	43	41	44	64	56
Ketchikan	58	42	40	42	63	55
Skagway	49	39	37	39	63	56
Anchorage	49	89	100	93	83	86
Denali	28	48	48	55	67	83
Glacier Bay	24	16	16	16	27	24
Seward	22	40	42	100	28	44
Fairbanks	21	33	31	36	39	45
Whittier	14	26	24	18	100	44
Talkeetna	13	23	23	26	40	100
Lodging Types Used						
Cruise ship	56	42	40	41	62	54
Hotel/motel	38	61	65	67	61	67
Lodge	19	31	29	31	43	50
Private home	16	23	23	20	14	14
Campground/RV	6	9	9	14	8	12
B&B	5	7	7	11	5	9
Wilderness camping	3	4	4	5	3	4
Other	5	8	8	8	7	8

TABLE 5.48 - Length of Stay, Destinations and Lodging Type (cont'd)
Southcentral Communities (%)

	All Visitors	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Average length of stay in Alaska	9.2 nights	13.4 nights	13.2 nights	12.6 nights	11.1 nights	15.5 nights
Regions Visited						
Southeast	68	24	28	26	25	33
Southcentral	56	100	100	100	100	100
Interior	33	48	43	60	53	90
Southwest	4	5	13	5	4	8
Far North	2	3	3	3	2	8
Destinations Visited, Top 10						
Juneau	61	16	19	18	20	15
Ketchikan	58	15	18	17	18	11
Skagway	49	15	12	20	17	20
Anchorage	49	89	90	93	97	86
Denali	28	40	35	47	47	67
Glacier Bay	24	9	7	10	10	10
Seward	22	56	56	50	57	50
Fairbanks	21	26	21	27	22	58
Whittier	14	25	21	26	35	36
Talkeetna	13	23	22	36	33	31
Lodging Types Used						
Cruise ship	56	13	16	17	17	8
Hotel/motel	38	52	51	56	64	64
Lodge	19	29	24	20	25	22
Private home	16	36	33	38	34	22
Campground/RV	6	23	23	20	13	41
B&B	5	12	13	11	14	14
Wilderness camping	3	7	8	7	4	12
Other	5	10	10	10	9	10

TABLE 5.49 - Statewide Activities – Top 10 Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Shopping	69	70	69	77	77	78
Wildlife viewing	52	63	65	73	73	78
City/sightseeing tours	39	38	38	42	46	50
Train	38	42	41	47	59	61
Hiking/nature walk	38	48	49	57	51	63
Day cruises	36	39	39	54	57	54
Museums	27	34	35	41	40	45
Historical/cultural attractions	25	29	29	33	35	41
Fishing	20	25	25	28	20	21
Visiting friends/relatives	19	28	29	25	20	21

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Shopping	70	71	75	74	70
Wildlife viewing	66	68	68	73	68
City/sightseeing tours	24	27	30	31	29
Train	21	15	23	31	24
Hiking/nature walk	51	52	57	66	53
Day cruises	43	42	40	49	53
Museums	35	41	41	42	52
Historical/cultural attractions	26	25	32	32	31
Fishing	56	53	30	29	29
Visiting friends/relatives	42	36	46	46	28

TABLE 5.50 - Activities in Community/Region
Southcentral Communities (%)

	South-central	Anchorage	Seward	Whittier	Talkeetna
Wildlife viewing	46	27	49	41	27
Birdwatching	13	8	13	7	7
Cultural activities	39	43	18	10	18
Museums	27	30	13	5	9
Historical/cultural attractions	18	20	6	6	10
Native cultural tours/act.	10	13	1	1	6
Gold panning/mine tour	3	1	<1	<1	1
Hiking/nature walk	38	26	31	11	31
Visiting friends/relatives	32	30	4	1	3
Day cruises	29	1	47	43	6
City/sightseeing tours	26	33	11	13	15
Fishing	25	3	14	6	6
Unguided	15	2	10	4	3
Guided	13	<1	4	2	3
Camping	11	6	14	6	9
Flightseeing	9	3	1	<1	25
Tramway/gondola	6	1	<1	-	<1
Shows/Alaska entertainment	6	8	1	<1	2
Kayaking/canoeing	5	1	4	2	2
Biking	5	6	1	<1	<1
Dog sledding	4	1	5	-	5
Rafting	4	<1	<1	-	8
Salmon bake	2	1	3	-	<1
ATV/4-wheeling	2	<1	<1	-	2
Northern lights viewing	1	1	<1	-	2
Hunting	<1	<1	<1	-	-
Zipline	<1	-	<1	-	-
Other	9	5	3	4	8

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

TABLE 5.50 - Activities in Community/Region (Cont'd)
Southcentral Communities (%)

	South-central	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Wildlife viewing	46	44	41	29	37	30
Birdwatching	13	10	15	8	10	9
Cultural activities	39	12	19	21	8	26
Museums	27	5	13	7	1	20
Historical/cultural attractions	18	7	7	12	3	11
Native cultural tours/act.	10	2	1	1	1	2
Gold panning/mine tour	3	1	-	5	4	-
Hiking/nature walk	38	21	23	18	39	19
Visiting friends/relatives	32	26	11	39	6	11
Day cruises	29	7	8	1	2	29
City/sightseeing tours	26	7	12	8	9	8
Fishing	25	49	40	9	1	17
Unguided	15	34	13	7	1	13
Guided	13	22	28	2	<1	6
Camping	11	18	19	19	5	36
Flightseeing	9	6	4	2	2	2
Tramway/gondola	6	<1	-	-	43	1
Shows/Alaska entertainment	6	<1	1	1	1	1
Kayaking/canoeing	5	3	5	2	<1	10
Biking	5	1	2	1	3	1
Dog sledding	4	<1	<1	4	2	-
Rafting	4	7	-	1	3	1
Salmon bake	2	2	<1	<1	1	1
ATV/4-wheeling	2	3	<1	4	1	<1
Northern lights viewing	1	<1	<1	1	<1	<1
Hunting	<1	<1	-	1	-	1
Zipline	<1	<1	-	-	<1	-
Other	9	5	3	8	5	5

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

TABLE 5.51 - Satisfaction Ratings
Southcentral Communities (%)

	All Visitors		Southcentral		Anchorage		Seward		Whittier		Talkeetna	
Compared to expectations												
Much higher	26		27		27		29		30		33	
Higher	37		38		38		38		40		40	
About as expected	34		31		32		30		27		24	
Value for the money, compared to other destinations												
Much better	13		12		11		12		10		12	
Better	24		24		24		22		25		21	
About the same	50		48		48		49		49		49	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	71	4.7	72	4.7	72	4.7	75	4.7	71	4.7	74	4.7
Friendliness of residents	69	4.6	69	4.6	69	4.6	72	4.7	68	4.6	71	4.7
Sightseeing	67	4.6	69	4.7	69	4.7	71	4.7	69	4.7	73	4.7
Tours and activities	63	4.6	64	4.6	64	4.6	66	4.6	60	4.5	66	4.6
Wildlife viewing	55	4.4	57	4.4	57	4.4	60	4.5	54	4.3	58	4.4
Accommodations	53	4.4	50	4.4	49	4.4	48	4.4	51	4.4	47	4.4
Visitor info. services	52	4.4	53	4.4	53	4.4	55	4.4	50	4.4	56	4.5
Transportation within Alaska	47	4.4	50	4.4	50	4.4	54	4.4	53	4.5	57	4.5
Restaurants	37	4.2	37	4.2	37	4.2	34	4.1	36	4.2	36	4.2
Value for the money	32	4.0	29	4.0	29	4.0	28	3.9	28	4.0	28	3.9
Shopping	29	4.0	29	4.0	29	4.0	31	4.0	29	4.0	31	4.0
Very likely to recommend Alaska	78		77		77		78		79		78	
Very likely to return to Alaska in next five years	38		42		43		35		31		29	

	Kenai/ Soldotna		Homer		Palmer/ Wasilla		Girdwood		Valdez	
Compared to expectations										
Much higher	24		22		26		27		29	
Higher	42		41		39		41		38	
About as expected	33		33		33		29		31	
Value for the money, compared to other destinations										
Much better	12		11		12		12		10	
Better	23		22		23		22		22	
About the same	47		46		46		48		45	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall exper. in Alaska	72	4.7	72	4.7	74	4.7	73	4.7	73	4.7
Sightseeing	71	4.7	69	4.7	72	4.7	75	4.7	69	4.7
Friendliness of residents	65	4.6	68	4.6	68	4.6	65	4.6	64	4.6
Tours and activities	63	4.5	61	4.5	64	4.6	63	4.6	57	4.5
Wildlife viewing	59	4.5	59	4.5	60	4.5	60	4.5	65	4.6
Visitor info. services	51	4.4	55	4.5	58	4.5	53	4.4	53	4.5
Accommodations	48	4.4	46	4.3	47	4.3	47	4.3	33	4.2
Transportation within Alaska	44	4.3	44	4.3	47	4.3	51	4.3	44	4.3
Restaurants	33	4.1	33	4.1	36	4.2	40	4.2	22	4.0
Value for the money	26	3.9	29	3.9	30	3.9	25	3.8	25	3.8
Shopping	23	3.9	27	4.0	31	4.1	26	4.0	21	3.9
Very likely to recommend Alaska	76		79		78		77		74	
Very likely to return to Alaska in next five years	52		47		52		50		41	

TABLE 5.52 - Previous Alaska Travel Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Been to Alaska before for vacation	38	42	42	34	26	26
Average # of vacation trips (base: repeaters)	5.0	4.3	4.2	3.3	3.5	2.8
Previous mode of transportation used to enter/exit Alaska						
Air	71	82	84	77	77	77
Cruise	29	22	21	28	30	30
Highway	9	7	6	9	8	7
Ferry	3	3	3	4	6	2
		Kenai/ Soldotna	**Homer**	**Palmer/ Wasilla**	**Girdwood**	**Valdez**
Been to Alaska before for vacation		50	49	48	47	44
Average # of vacation trips (base: repeaters)		4.6	4.3	5.1	4.5	4.1
Previous mode of transportation used to enter/exit Alaska						
Air		85	79	83	88	66
Cruise		14	21	14	13	16
Highway		11	10	11	6	20
Ferry		3	3	3	5	8

TABLE 5.53 - Trip Planning
Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Trip Decision – Top Three Periods						
Jan-March 2011	26	26	27	28	26	26
Jul-Sept 2010	19	19	19	20	20	22
Oct-Dec 2010	18	17	16	16	18	21
Trip Booking – Top Three Periods						
Jan-March 2011	30	30	30	33	35	34
Apr-June 2011	26	28	27	25	23	19
Oct-Dec 2010	17	16	16	19	21	24
Internet and Travel Agent Usage						
Used internet	81	83	82	86	84	85
Booked over internet	56	60	61	63	57	61
Booked through travel agent	47	42	42	44	56	52
Other Sources – Top 10						
Friends/family	50	54	55	55	53	55
Cruise line	37	28	26	30	41	37
Prior experience	24	26	27	21	17	18
Brochures	23	26	27	31	34	33
AAA	16	18	17	20	23	25
Travel/guide book	12	15	15	21	18	23
Tour company	7	9	9	11	11	11
Television	6	6	7	7	8	7
Magazine	6	7	8	9	7	9
Hotel/lodge	5	7	8	9	8	7

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Decision – Top Three Periods					
Jan-March 2011	29	26	31	29	25
Jul-Sept 2010	19	17	19	17	18
Oct-Dec 2010	16	14	14	17	17
Trip Booking – Top Three Periods					
Jan-March 2011	29	30	30	31	31
Apr-June 2011	31	33	31	29	32
Oct-Dec 2010	15	16	14	14	20
Internet and Travel Agent Usage					
Used internet	88	88	87	89	86
Booked over internet	72	68	71	73	61
Booked through travel agent	23	23	24	26	27
Other Sources – Top 10					
Friends/family	60	57	62	62	46
Cruise line	10	11	13	14	6
Prior experience	33	29	31	31	31
Brochures	34	32	33	37	40
AAA	15	17	19	20	17
Travel/guide book	19	19	19	19	28
Tour company	6	5	4	6	12
Television	5	6	7	7	10
Magazine	9	10	8	10	13
Hotel/lodge	8	8	8	12	9

TABLE 5.54 - Demographics
Southcentral Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Origin						
Western US	36	35	36	30	25	24
Southern US	22	22	22	23	25	26
Midwestern US	14	18	18	20	21	21
Eastern US	11	12	12	11	14	15
Canada	7	4	4	6	5	5
Other International	10	9	9	11	10	10
Other Demographics						
Average party size	2.5	2.4	2.4	2.6	2.5	2.6
Average group size	5.1	4.5	4.6	4.8	5.1	4.6
Male/female	50/50	51/49	51/49	49/51	49/51	47/53
Average age	50.7	50.7	50.6	50.1	52.1	51.5
Children in household	24	24	24	23	23	22
Retired/semi-retired	41	40	39	41	45	45
College graduate	60	61	61	62	59	65
Average income	$107,000	$108,000	$108,000	$109,000	$109,000	$109,000

		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Origin						
Western US		43	43	40	40	32
Southern US		21	21	22	22	17
Midwestern US		16	16	19	17	15
Eastern US		9	9	10	12	9
Canada		2	3	2	3	6
Other International		8	8	7	6	21
Other Demographics						
Average party size		2.5	2.5	2.4	2.5	2.5
Average group size		3.5	3.5	3.4	4.4	3.4
Male/female		55/45	54/46	49/51	49/51	55/45
Average age		50.0	51.6	50.2	49.3	48.9
Children in household		23	21	22	26	24
Retired/semi-retired		39	43	38	36	43
College graduate		59	56	57	64	57
Average income		$110,000	$108,000	$98,000	$106,000	$101,000

TABLE 5.55 - Visitor Expenditures, Per Person
Southcentral Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Average per-person total spent in Alaska	$941	$1,193	$1,225	$1,425	$1,149	$1,445
Average per-person total spent in region/ community		545	407	167	28	126
Lodging		140	132	33	2	26
Tours/activity/ entertainment		84	22	68	17	48
Gifts/souvenirs/ clothing		64	48	14	1	14
Food/beverage		118	86	29	4	32
Rental cars/fuel/ transportation		112	111	11	3	5
Other		27	8	12	1	1
		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Average per-person total spent in Alaska		$1,680	$1,651	$1,363	$1,393	$2,175
Average per-person total spent in region/ community		341	257	128	79	196
Lodging		58	59	27	24	68
Tours/activity/ entertainment		74	87	21	11	50
Gifts/souvenirs/ clothing		46	25	16	7	9
Food/beverage		67	48	40	27	37
Rental cars/fuel/ transportation		30	18	22	8	30
Other		66	20	2	2	2

Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: Southeast Communities

This chapter profiles the Southeast visitor market and visitors to the nine most-frequented communities in the region. Definitions for each community and sample sizes are provided in the table below.

TABLE 5.56 - Market Definition and Sample Size
Southeast Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southeast	Visited at least one destination in the Southeast region, day and/or overnight	4,044	±1.5%
Juneau	Visited Juneau or Douglas, day and/or overnight	2,851	1.8
Ketchikan	Visited Ketchikan or Saxman, day and/or overnight	2,556	1.9
Skagway	Visited Skagway, day and/or overnight	2,173	2.1
Sitka	Visited Sitka, day and/or overnight	630	3.9
Prince of Wales Island	Visited Prince of Wales Island, day and/or overnight	190	7.1
Glacier Bay	Visited Glacier Bay, day and/or overnight	800	3.5
Haines	Visited Haines, day and/or overnight	474	4.5
Hoonah/Icy Strait Point	Visited Hoonah or Icy Strait Point, day and/or overnight	342	5.3
Petersburg	Visited Petersburg, day and/or overnight	175	7.4
Wrangell	Visited Wrangell, day and/or overnight	189	7.1

The Southeast market has several unique characteristics when compared to the overall visitor market.

- The vast majority of Southeast visitors were traveling for vacation/pleasure (93 percent), compared to 77 percent of total visitors. Nearly nine out of ten purchased a multi-day package, versus two-thirds of the overall market. These figures correspond with the much higher likelihood of taking a cruise: 85 percent of southeast visitors, compared to 57 percent of the total market.

- Of Southeast non-cruise visitors who purchased a package, two-thirds were fishing lodge packages (compared to 44 percent of all non-cruise visitors).

- The average length of stay among Southeast visitors was 8.7 nights, slightly less than the overall market (9.2 nights).

- Approximately half of Southeast travelers participated in a city/sightseeing tour or train activity, more on average than total visitors (39 percent and 38 percent, respectively).

- Southeast visitors are less likely to return to the state in the next five years (27 percent), compared to total visitors (38 percent). Similarly, Southeast visitors were less likely to have traveled to Alaska previously (29 percent vs. 38 percent of total). These differences reflect Southeast's higher proportion of cruise visitors.

- Three out of five booked their travel arrangements through a travel agent, compared to under half of the overall visitor market.
- Total in-state spending among Southeast visitors was less than that of total visitors ($751 vs. $941). Average spending per-person in the region was $485, with the bulk of spending going towards tours/activities/entertainment ($185) and gifts/souvenirs/clothing ($183).

There were also many notable differences in visitation characteristics among the most-frequented communities in Southeast.

- Over 90 percent of visitors to Juneau, Ketchikan, Skagway, Glacier Bay, and Hoonah were cruise vsitiors. Sitka (84 percent) and Haines (74 percent) had a slightly lower rate of cruise visitors, while Petersburg (31 percent) and Wrangell (36 percent) had a much lower rate. Most of the differences in the trip behavior and visitor characteristics among these markets relate to their proportion of cruise visitors.
- Prince of Wales Island, Petersburg, Wrangell, and Sitka were more likely to attract business and VFR travelers compared with the other communities.
- Over three-quarters of Prince of Wales visitors traveled by air, in sharp contrast to 11 percent of total visitors to the region.
- Visitors to Prince of Wales Island visitors were most likely to have booked a fishing lodge package.
- Wrangell, Petersburg, and Haines averaged the longest length of stay in Alaska, at 14.4 nights, 13.1 nights, and 11.1 nights, respectively. Two-thirds of Wrangell visitors overnighted in a hotel/motel, the highest among Southeast visitors.
- Participation in activities was generally consistent among visitors to the various Southeast communities, though Prince of Wales, Petersburg, and Wrangell travelers were less likely to have taken a train in Alaska and the latter two communities were more likely to have participated in hiking/nature walks.
- Nearly two-thirds of Glacier Bay visitors participated in wildlife viewing, compared to 41 percent of total Southeast participation.
- Seven out of ten Prince of Wales Island visitors participated in fishing, the highest among Southeast communities.
- Nearly half of Petersburg visitors said they were very likely to return to Alaska in the next five years, in contrast to just 27 percent of Southeast visitors as a whole. Similarly, more than half said they had been to the state previously for vacation.

- Hoonah visitors were most likely to have booked travel arrangements through a travel agent (74 percent).
- Nearly three-quarters of visitors to Prince of Wales Island were male.
- Wrangell and Sitka visitors reported the highest average annual income ($113,000 and $111,000, respectively), compared to the overall average for Southeast visitors ($108,000).
- Highest in-state spending was reported by Wrangell visitors, at $1,807, in contrast to the Southeast visitor market average of $751 and the lowest by Glacier Bay visitors, at $654. Highest per-person spending in the community was in Sitka with an average of $350, while the lowest was in Glacier Bay with an average of $23.

TABLE 5.57 - Trip Purpose and Packages
Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Trip Purpose						
Vacation/pleasure	77	93	95	96	98	88
Visiting friends/rel.	14	4	2	1	1	4
Business only	5	1	1	1	<1	1
Business/pleasure	4	2	2	2	1	7
Purchased multi-day package						
Yes	66	88	95	96	95	90
Package type (Base: non-cruise, purchased package)						
Fishing lodge	44	65	44	69	10	86
Wilderness lodge	16	15	27	12	34	6
Adventure tour	13	8	18	9	9	5
Motorcoach tour	10	4	2	2	21	-
Rail package	9	4	5	3	8	-
Rental car/RV package	6	4	3	3	18	1
Other	2	1	2	1	-	1
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Trip Purpose						
Vacation/pleasure	76	97	94	98	77	80
Visiting friends/rel.	19	2	4	1	9	9
Business only	4	<1	1	<1	11	4
Business/pleasure	2	2	1	1	3	6
Purchased multi-day package						
Yes	45	95	77	99	43	47
Package type (Base: non-cruise, purchased package)						
Fishing lodge	87	24	3	63	61	31
Wilderness lodge	13	43	32	50	23	17
Adventure tour	-	22	25	-	8	24
Motorcoach tour	-	1	15	-	1	14
Rail package	-	4	7	-	-	1
Rental car/RV package	-	6	18	-	5	6
Other	-	<1	1	-	1	6

TABLE 5.58 - Transportation Modes Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Transportation Market						
Cruise	57	85	94	95	95	84
Air	39	11	5	3	1	13
Highway/ferry	4	4	1	1	4	2
Used to Travel Between Communities						
Motorcoach/bus	25	33	35	36	41	10
Train	22	28	29	30	34	7
Rental vehicle	15	6	5	4	5	2
Personal vehicle	11	3	1	1	2	3
Air	10	7	6	5	5	7
State ferry	3	4	3	2	3	4
Rental RV	2	1	<1	<1	1	<1
Personal RV	1	1	<1	<1	1	<1
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Transportation Market						
Cruise	12	93	74	98	31	36
Air	77	6	8	1	50	45
Highway/ferry	11	1	18	<1	19	18
Used to Travel Between Communities						
Motorcoach/bus	16	46	46	48	17	23
Train	8	41	39	47	14	20
Rental vehicle	11	7	10	7	10	27
Personal vehicle	16	3	6	2	7	7
Air	45	7	9	7	28	16
State ferry	19	3	20	<1	23	17
Rental RV	1	1	3	1	1	8
Personal RV	<1	<1	4	-	3	3

TABLE 5.59 - Length of Stay, Destinations and Lodging Type Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Average length of stay in Alaska	9.2 nights	8.7 nights	8.7 nights	8.7 nights	8.7 nights	8.4 nights
Regions Visited						
Southeast	68	100	100	100	100	100
Southcentral	56	40	40	40	45	19
Interior	33	30	29	29	34	6
Southwest	4	2	2	2	1	9
Far North	2	1	1	1	1	1
Destinations Visited, Top 10						
Juneau	61	89	100	95	94	87
Ketchikan	58	84	90	100	89	85
Skagway	49	72	76	76	100	23
Anchorage	49	34	34	34	38	18
Denali	28	28	28	29	33	5
Glacier Bay	24	25	26	27	27	18
Seward	22	17	16	17	18	8
Fairbanks	21	20	19	20	24	3
Whittier	14	14	15	16	18	3
Talkeetna	13	12	12	13	15	2
Lodging Types Used						
Cruise ship	56	81	89	91	90	80
Hotel/motel	38	31	29	28	32	10
Lodge	19	20	19	20	22	8
Private home	16	5	3	2	1	5
Campground/RV	6	3	1	1	2	1
B&B	5	3	2	2	2	2
Wilderness camping	3	1	<1	<1	<1	1
Other	5	3	2	2	2	3

TABLE 5.59 - Length of Stay, Destinations and Lodging Type (cont'd)
Southeast Communities (%)

	POW	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell
Average length of stay in Alaska	10.9 nights	9.6 nights	11.1 nights	9.9 nights	13.1 nights	14.4 nights
Regions Visited						
Southeast	100	100	100	100	100	100
Southcentral	24	55	60	75	39	73
Interior	18	44	54	41	30	64
Southwest	6	2	3	11	13	9
Far North	8	2	4	2	8	11
Destinations Visited, Top 10						
Juneau	17	93	83	94	66	58
Ketchikan	83	91	74	97	45	57
Skagway	14	78	49	66	23	40
Anchorage	22	47	56	71	31	69
Denali	18	44	47	40	28	59
Glacier Bay	9	100	48	9	21	23
Seward	13	21	44	51	8	48
Fairbanks	14	30	43	30	21	38
Whittier	12	24	10	5	18	31
Talkeetna	8	19	10	22	17	35
Lodging Types Used						
Cruise ship	12	88	69	94	31	30
Hotel/motel	49	38	55	50	59	67
Lodge	44	29	26	26	27	29
Private home	26	3	5	2	12	13
Campground/RV	5	1	13	1	6	18
B&B	10	2	6	6	12	10
Wilderness camping	7	1	2	<1	4	7
Other	16	4	5	4	28	16

TABLE 5.60 - Statewide Activities – Top 10
Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Shopping	69	74	75	76	76	71
Wildlife viewing	52	52	52	53	55	48
City/sightseeing tours	39	48	51	52	52	46
Train	38	51	54	55	66	20
Hiking/nature walk	38	34	33	33	32	33
Day cruises	36	34	36	35	38	32
Museums	27	28	27	28	28	29
Historical/cultural attractions	25	28	29	29	29	37
Fishing	20	12	8	9	8	16
Visiting friends/relatives	19	7	5	5	4	6
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Shopping	60	79	77	82	61	73
Wildlife viewing	45	67	63	60	60	74
City/sightseeing tours	17	58	55	62	36	42
Train	14	65	47	60	24	35
Hiking/nature walk	40	43	50	42	59	70
Day cruises	12	40	40	42	23	46
Museums	19	35	34	35	41	57
Historical/cultural attractions	17	37	33	33	47	39
Fishing	71	8	11	15	33	23
Visiting friends/relatives	28	6	8	7	18	14

TABLE 5.61 - Activities in Community/Region
Southeast Communities (%)

	Southeast	Juneau	Ketchikan	Skagway	Sitka
City/sightseeing tours	46	38	38	39	28
Cultural activities	46	25	37	38	46
Historical/cultural attractions	23	12	18	17	34
Museums	22	12	13	17	19
Native cultural tours/act.	16	4	18	4	16
Gold panning/mine tour	8	4	1	9	<1
Wildlife viewing	42	27	21	23	42
Birdwatching	9	6	6	5	12
Hiking/nature walk	28	16	14	16	24
Day cruises	26	21	7	7	15
Flightseeing	15	8	11	5	<1
Tramway/gondola	14	16	2	1	1
Fishing	11	3	6	1	15
Guided	8	2	5	<1	11
Unguided	4	1	1	1	5
Shows/Alaska entertainment	10	2	10	5	4
Salmon bake	10	10	1	4	<1
Zipline	7	2	5	2	-
Dog sledding	7	4	<1	7	-
Kayak/canoeing	7	2	4	3	4
Visiting friends/relatives	5	2	2	1	4
Biking	4	2	<1	3	3
Rafting	3	2	<1	2	<1
ATV/4-wheeling	2	<1	1	1	2
Camping	2	<1	<1	2	1
Northern lights viewing	1	<1	<1	<1	<1
Hunting	<1	<1	-	-	<1
Other	9	6	4	5	3

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

TABLE 5.61 - Activities in Community/Region (Cont'd) Southeast Communities (%)

	POW	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell
City/sightseeing tours	1	11	20	14	6	9
Cultural activities	10	11	20	23	24	28
Historical/cultural attractions	6	7	6	13	18	15
Museums	<1	2	11	8	10	19
Native cultural tours/act.	6	2	5	9	5	9
Gold panning/mine tour	1	-	2	<1	1	<1
Wildlife viewing	45	73	40	32	52	52
Birdwatching	14	13	15	5	29	7
Hiking/nature walk	26	10	23	24	39	44
Day cruises	1	16	9	20	5	12
Flightseeing	3	2	3	1	12	10
Tramway/gondola	-	<1	<1	3	-	-
Fishing	72	1	6	7	24	9
Guided	35	<1	2	3	5	2
Unguided	45	<1	4	3	19	7
Shows/Alaska entertainment	<1	<1	1	2	-	1
Salmon bake	<1	1	1	1	1	-
Zipline	-	-	-	19	-	-
Dog sledding	-	-	2	-	-	-
Kayak/canoeing	4	3	5	4	6	6
Visiting friends/relatives	26	1	5	1	18	8
Biking	<1	1	2	2	6	2
Rafting	1	<1	3	<1	-	1
ATV/4-wheeling	1	<1	9	4	2	1
Camping	7	2	10	<1	9	12
Northern lights viewing	-	3	-	-	-	-
Hunting	3	-	<1	-	1	2
Other	8	6	5	1	11	5

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

TABLE 5.62 - Satisfaction Ratings Southeast Communities (%)

	All Visitors		Southeast		Juneau		Ketchikan		Skagway		Sitka	
Compared to expectations												
Much higher	26		28		28		28		29		27	
Higher	37		37		38		38		38		34	
About as expected	34		32		32		31		30		35	
Value for the money, compared to other destinations												
Much better	13		13		13		13		12		17	
Better	24		25		25		24		24		27	
About the same	50		51		51		52		52		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	71	4.7	72	4.7	71	4.7	72	4.7	73	4.7	74	4.7
Friendliness of residents	69	4.6	72	4.7	72	4.7	72	4.7	72	4.7	72	4.7
Sightseeing	67	4.6	67	4.6	67	4.6	67	4.6	69	4.7	68	4.6
Tours and activities	63	4.6	64	4.6	63	4.6	63	4.6	64	4.6	68	4.6
Wildlife viewing	55	4.4	55	4.3	54	4.3	53	4.3	54	4.3	59	4.5
Accommodations	53	4.4	57	4.5	58	4.5	60	4.5	59	4.5	60	4.5
Visitor info. services	52	4.4	52	4.4	53	4.4	52	4.4	55	4.5	51	4.4
Transportation within Alaska	47	4.4	51	4.4	51	4.4	52	4.4	53	4.4	46	4.3
Restaurants	37	4.2	37	4.2	37	4.2	38	4.2	39	4.2	36	4.2
Value for the money	32	4.0	34	4.1	34	4.1	34	4.1	34	4.1	39	4.2
Shopping	29	4.0	30	4.0	31	4.0	31	4.0	31	4.0	31	4.1
Very likely to recommend Alaska	78		79		80		80		81		79	
Very likely to return to Alaska in next five years	38		27		24		24		22		32	

	POW		Glacier Bay		Haines		Hoonah		Petersburg		Wrangell	
Compared to expectations												
Much higher	26		32		32		29		46		31	
Higher	25		39		41		36		25		40	
About as expected	47		26		25		32		26		29	
Value for the money, compared to other destinations												
Much better	22		13		17		15		20		15	
Better	27		24		25		26		22		23	
About the same	41		54		48		47		45		46	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	72	4.7	73	4.7	76	4.7	71	4.7	77	4.7	71	4.7
Wildlife viewing	70	4.7	55	4.3	64	4.6	55	4.4	64	4.6	70	4.6
Sightseeing	69	4.7	71	4.7	69	4.7	66	4.6	69	4.7	72	4.7
Friendliness of residents	68	4.6	71	4.6	75	4.7	72	4.7	66	4.6	58	4.5
Accommodations	61	4.5	56	4.5	47	4.3	57	4.5	48	4.4	38	4.3
Transportation within Alaska	57	4.5	53	4.4	54	4.4	59	4.5	51	4.4	46	4.4
Tours and activities	53	4.4	66	4.6	65	4.6	63	4.6	61	4.5	55	4.4
Restaurants	43	4.2	35	4.2	32	4.1	38	4.2	35	4.1	25	4.0
Visitor info. services	36	4.1	51	4.4	52	4.4	60	4.5	46	4.3	49	4.4
Value for the money	36	4.1	34	4.1	36	4.2	34	4.1	30	4.1	23	3.8
Shopping	27	3.8	27	4.0	28	4.0	33	4.1	23	3.7	19	3.8
Very likely to recommend Alaska	75		82		83		78		83		67	
Very likely to return to Alaska in next five years	72		22		34		20		49		43	

TABLE 5.63 - Previous Alaska Travel
Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Been to Alaska before for vacation	38	29	26	26	24	37
Average # of vacation trips (base: repeaters)	5.0	5.2	2.6	2.8	4.8	3.7
Previous mode of transportation used to enter/exit Alaska						
Air	71	56	53	52	49	54
Cruise	29	48	57	59	59	52
Highway	9	11	7	7	12	7
Ferry	3	4	4	5	5	4
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Been to Alaska before for vacation	68	25	41	26	53	32
Average # of vacation trips (base: repeaters)	8.3	2.4	10.4	3.7	4.1	3.4
Previous mode of transportation used to enter/exit Alaska						
Air	86	52	43	48	80	68
Cruise	6	64	49	68	9	21
Highway	2	5	18	8	12	13
Ferry	11	3	4	2	10	17

TABLE 5.64 - Trip Planning
Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Trip Decision – Top Three Periods						
Jan-March 2011	26	24	24	24	24	22
Jul-Sept 2010	19	21	21	21	22	22
Oct-Dec 2010	18	19	20	20	20	17
Trip Booking – Top Three Periods						
Jan-March 2011	30	32	32	33	34	26
Apr-June 2011	26	21	20	20	17	26
Oct-Dec 2010	17	20	21	21	21	19
Internet and Travel Agent Usage						
Used internet	81	80	81	81	81	74
Booked over internet	56	50	50	49	48	50
Booked through travel agent	47	60	65	66	66	58
Other Sources – Top 10						
Friends/family	50	46	45	46	45	41
Cruise line	37	53	59	60	61	54
Prior experience	24	19	16	16	15	21
Brochures	23	24	23	24	25	19
AAA	16	19	20	20	20	18
Travel/guide book	12	13	13	13	14	9
Tour company	7	9	9	9	10	5
Television	6	7	7	7	7	6
Magazine	6	6	5	5	5	4
Hotel/lodge	5	4	3	3	3	3
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Trip Decision – Top Three Periods						
Jan-March 2011	20	30	24	21	32	24
Jul-Sept 2010	28	20	14	27	18	29
Oct-Dec 2010	14	18	19	19	14	22
Trip Booking – Top Three Periods						
Jan-March 2011	39	39	32	33	44	34
Apr-June 2011	29	21	24	21	25	25
Oct-Dec 2010	7	19	23	20	9	25
Internet and Travel Agent Usage						
Used Internet	79	81	82	78	85	85
Booked over Internet	66	48	50	49	52	61
Booked through travel agent	19	70	53	74	41	48
Other Sources – Top 10						
Friends/family	62	50	48	49	38	35
Cruise line	8	63	49	56	20	18
Prior experience	46	16	27	17	25	21
Brochures	27	28	30	20	38	39
AAA	13	23	29	21	24	18
Travel/guide book	18	17	20	16	20	24
Tour company	<1	12	8	13	7	12
Television	13	8	4	9	13	10
Magazine	7	7	11	7	7	14
Hotel/lodge	15	3	5	3	15	7

TABLE 5.65 - Demographics
Southeast Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Origin						
Western US	36	30	29	28	24	44
Southern US	22	23	25	25	26	20
Midwestern US	14	15	15	15	16	12
Eastern US	11	11	11	12	13	9
Canada	7	9	8	8	9	2
Other International	10	12	12	12	12	12
Other Demographics						
Average party size	2.5	2.6	2.6	2.6	2.6	2.5
Average group size	5.1	5.9	6.0	6.3	5.8	7.5
Male/female	50/50	47/53	45/55	46/54	46/54	47/53
Average age	50.7	51.8	52.0	52.1	51.6	54.0
Children in household	24	23	23	23	23	22
Retired/semi-retired	41	45	47	47	45	54
College graduate	60	60	60	60	61	63
Average income	$107,000	$108,000	$108,000	$107,000	$108,000	$111,000
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Origin						
Western US	60	24	26	16	44	32
Southern US	12	21	17	22	9	19
Midwestern US	8	17	17	19	21	18
Eastern US	4	15	12	13	9	6
Other International	8	15	12	10	8	18
Canada	7	8	15	19	9	6
Other Demographics						
Average party size	2.4	2.4	2.4	2.5	2.4	2.6
Average group size	4.7	5.3	4.4	6.4	3.1	4.2
Male/female	72/28	47/53	49/51	46/54	52/48	45/55
Average age	52.7	54.0	52.4	52.5	54.3	49.7
Children in household	24	20	20	26	20	30
Retired/semi-retired	39	50	48	48	48	37
College graduate	47	61	60	59	63	59
Average income	$102,000	$109,000	$103,000	$109,000	$105,000	$113,000

TABLE 5.66 - Visitor Expenditures, Per Person
Southeast Communities

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka
Average per-person total spent in Alaska	$941	$751	$693	$687	$668	$813
Average per-person total spent in region/ community		485	197	152	150	350
Lodging		17	8	4	2	11
Tours/activity/ entertainment		185	86	51	91	45
Gifts/souvenirs/ clothing		183	83	78	45	72
Food/beverage		32	12	9	9	20
Rental cars/fuel/ transportation		8	2	2	2	3
Other		60	6	8	1	199
	POW	**Glacier Bay**	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**
Average per-person total spent in Alaska	*	$654	$973	$804	$1,592	$1,807
Average per-person total spent in region/ community	*	23	152	63	212	223
Lodging	*	2	17	-	55	23
Tours/activity/ entertainment	*	4	68	42	17	32
Gifts/souvenirs/ clothing	*	-	15	11	24	7
Food/beverage	*	1	22	7	60	34
Rental cars/fuel/ transportation	*	1	11	2	6	22
Other	*	15	19	1	50	105

*Sample size is too small for analysis.
Notes: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: Interior Communities

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

TABLE 5.67 - Market Definition and Sample Size
Interior Communities

Market	Definition	Sample Size	Maximum Margin of Error
Interior	Visited at least one destination in the Interior region, day and/or overnight	2,896	±1.8%
Denali	Visited Denali National Park, day and/or overnight	2,287	2.0
Fairbanks	Visited Fairbanks, day and/or overnight	1,993	2.2
Tok	Visited Tok, day and/or overnight	529	4.2
Glennallen	Visited Glennallen, day and/or overnight	405	4.9

Interior visitors differed from the overall visitor market in a few distinct ways.

- Interior visitors who purchased a multi-day package were more likely to have purchased a wilderness lodge package, adventure tour package, or a motorcoach tour package, in contrast to the total visitor market, which was most likely to purchase a fishing lodge package.
- Over half of Interior visitors reported traveling between communities by motorcoach/bus and/or train, nearly double the overall market.
- The average length of stay in Alaska for Interior visitors was 12 nights, versus 9.2 nights for total visitors. Nearly all visited the Southcentral region (92 percent) during their stay, compared to just over half of the total visitor market. Seven out of ten Interior travelers stayed at a hotel/motel, whereas just over one-third of total Alaska visitors used this type of lodging.
- Participation in popular activities, such as shopping, wildlife viewing, train, and hiking/nature walks, was generally higher among Interior visitors than the total visitor market.

Additionally, there were some noteworthy differences in visitation characteristics between Interior communities.

- Visitors to Glennallen were somewhat more likely to be VFRs than those heading to other communities.
- Visitors to Tok and Glennallen were much more likely to be highway/ferry visitors at 46 and 28 percent, compared to 4 percent of the overall visitor market.
- Denali visitors were most likely to purchase a multi-day package (72 percent), compared to one out of five Glennallen visitors.

- Nearly half of Glennallen visitors stayed in a campground or RV park, in comparison to 12 percent of total Interior visitors.
- Most popular activities among Fairbanks visitors were cultural activities, including gold panning/mine tour (44 percent), museums (28 percent), and historical/cultural attractions (28 percent).
- Denali visitors were more likely to participate in wildlife viewing or hiking/nature walks than visitors to other Interior communities.
- Two-thirds of Tok and Glennallen visitors went camping, making that the most popular activity in those communities.
- Half of Glennallen visitors said they are very likely to return to Alaska in the next five years, compared to 30 percent of total Interior visitors.
- Tok visitors were less likely to book part of their trip online than other Interior visitors (41 percent vs. 55 percent of total Interior). Just one out of four Glennallen visitors booked through a travel agent, compared to half of those that visited the Interior.
- Tok and Glennallen visitors reported lower average annual incomes of $95,000 and $93,000, respectively, compared to Interior visitors as a whole ($104,000).
- Average spending per-person in each community was significantly lower in Tok and Glennallen ($88 in each), compared to Denali and Fairbanks ($236 and $354, respectively). Fairbanks reported the highest expenditures on lodging at $146.

TABLE 5.68 - Trip Purpose and Packages Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Trip Purpose						
Vacation/pleasure	77	80	89	80	86	78
Visiting friends/rel.	14	12	8	10	10	17
Business only	5	4	1	6	1	1
Business/pleasure	4	3	2	4	3	4
Purchased multi-day package						
Yes	66	62	72	65	44	20
Package type (Base: non-cruise, purchased package)						
Fishing lodge	44	9	6	8	12	14
Wilderness lodge	16	27	29	22	20	25
Adventure tour	13	19	18	14	12	32
Motorcoach tour	10	20	21	30	24	9
Rail package	9	16	17	14	12	3
Rental car/RV package	6	8	7	8	20	13
Other	2	2	2	4	<1	4

TABLE 5.69 - Transportation Modes Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Transportation Market						
Cruise	57	52	62	58	36	7
Air	39	40	33	35	18	66
Highway/ferry	4	8	5	7	46	28
Used to Travel Between Communities						
Motorcoach/bus	25	54	64	58	38	12
Train	22	54	64	58	37	9
Rental vehicle	15	24	24	19	18	32
Personal vehicle	11	13	9	10	24	27
Air	10	14	12	16	8	10
State ferry	3	5	5	5	17	14
Rental RV	2	4	4	4	5	23
Personal RV	1	4	3	4	18	15

TABLE 5.70 - Length of Stay, Destinations and Lodging Type Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Average length of stay in Alaska	9.2 nights	12.0 nights	11.9 nights	12.5 nights	14.2 nights	15.6 nights
Regions Visited						
Southeast	68	60	69	66	67	33
Southcentral	56	92	96	89	92	100
Interior	33	100	100	100	100	100
Southwest	4	3	2	2	5	9
Far North	2	4	4	6	7	7
Destinations Visited, Top 10						
Juneau	61	52	60	56	31	13
Ketchikan	58	50	59	54	27	11
Skagway	49	51	59	56	57	17
Anchorage	49	80	85	73	83	86
Denali	28	84	100	83	71	62
Glacier Bay	24	22	26	24	14	10
Seward	22	40	44	38	37	58
Fairbanks	21	63	62	100	74	51
Whittier	14	31	35	27	17	34
Talkeetna	13	34	39	28	17	37
Lodging Types Used						
Cruise ship	56	50	59	55	33	6
Hotel/motel	38	71	74	70	65	52
Lodge	19	46	53	44	27	21
Private home	16	15	11	13	14	26
Campground/RV	6	12	11	11	38	49
B&B	5	8	9	7	8	11
Wilderness camping	3	5	4	4	11	18
Other	5	7	6	7	6	10

TABLE 5.71 - Statewide Activities – Top 10 Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Shopping	69	75	78	77	79	70
Wildlife viewing	52	72	79	71	67	71
City/sightseeing tours	39	46	52	49	39	29
Train	38	58	67	62	45	17
Hiking/nature walk	38	51	54	44	44	61
Day cruises	36	49	54	49	45	45
Museums	27	42	45	45	50	49
Historical/cultural attractions	25	37	39	39	31	35
Fishing	20	17	16	14	21	29
Visiting friends/relatives	19	21	16	17	18	34

TABLE 5.72 - Activities in Community/Region
Interior Communities (%)

	Interior	Denali	Fairbanks	Tok	Glennallen
Wildlife viewing	69	77	16	16	35
Birdwatching	12	11	5	3	7
Cultural activities	49	23	71	12	5
Gold panning/mine tour	28	4	44	5	<1
Historical/cultural attractions	23	12	28	1	2
Museums	19	6	28	4	3
Native cultural tours/act.	15	6	18	2	<1
Hiking/nature walk	38	38	14	9	18
City/sightseeing tours	26	21	25	8	4
Day cruises	16	4	24	1	-
Shows/Alaska entertainment	14	13	9	1	<1
Camping	13	9	9	66	68
Salmon bake	10	4	12	<1	<1
Rafting	9	10	<1	-	<1
Dog sledding	9	8	4	2	1
Visiting friends/relatives	9	2	12	3	5
Flightseeing	8	8	2	1	2
ATV/4-wheeling	6	6	1	1	5
Northern Lights viewing	3	1	4	2	<1
Fishing	3	1	2	2	12
Unguided	2	<1	2	2	10
Guided	1	1	<1	1	2
Biking	2	1	1	1	3
Kayaking/canoeing	1	1	1	<1	<1
Hunting	<1	-	<1	<1	2
Zipline	<1	<1	<1	-	-
Tramway/gondola	<1	<1	<1	-	-
Other	7	4	7	3	4

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

TABLE 5.73 - Satisfaction Ratings
Interior Communities (%)

	All Visitors		Interior		Denali		Fairbanks		Tok		Glennallen	
Compared to expectations												
Much higher	26		30		32		31		30		29	
Higher	37		40		40		38		39		40	
About as expected	34		27		26		27		28		28	
Value for the money, compared to other destinations												
Much better	13		11		11		11		12		14	
Better	24		24		24		23		21		18	
About the same	50		47		47		49		45		44	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall experience in Alaska	71	4.7	74	4.7	76	4.7	73	4.7	70	4.7	74	4.7
Friendliness of residents	69	4.6	71	4.7	73	4.7	71	4.7	77	4.7	65	4.6
Sightseeing	67	4.6	71	4.7	72	4.7	69	4.7	72	4.7	69	4.6
Tours and activities	63	4.6	65	4.6	66	4.6	65	4.6	68	4.6	62	4.5
Wildlife viewing	55	4.4	58	4.4	59	4.4	58	4.4	65	4.6	62	4.5
Accommodations	53	4.4	48	4.4	48	4.4	47	4.4	46	4.3	38	4.2
Visitor information services	52	4.4	55	4.5	56	4.5	54	4.4	65	4.6	59	4.5
Transportation within Alaska	47	4.4	54	4.5	58	4.5	55	4.5	53	4.4	38	4.2
Restaurants	37	4.2	34	4.2	35	4.2	33	4.1	30	4.1	25	4.0
Value for the money	32	4.0	29	4.0	29	4.0	30	4.0	36	4.1	30	3.9
Shopping	29	4.0	28	4.0	29	4.0	28	4.0	27	4.0	23	3.9
Very likely to recommend Alaska as a vacation destination	78		78		79		77		77		79	
Very likely to return to Alaska in the next five years	38		30		24		28		30		50	

TABLE 5.74 - Previous Alaska Travel
Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Been to Alaska before for vacation	38	32	25	33	41	47
Average # of vacation trips (base: repeaters)	5.0	2.9	2.2	2.7	3.7	4.2
Previous mode of transportation used to enter/exit Alaska						
Air	71	74	70	75	55	67
Cruise	29	26	39	29	27	11
Highway	9	11	9	8	30	23
Ferry	3	4	4	3	8	6

TABLE 5.75 - Trip Planning
Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Trip Decision – Top Three Periods						
Jan-March 2011	26	25	25	24	20	28
Jul-Sept 2010	19	19	20	19	18	18
Oct-Dec 2010	18	19	20	19	18	15
Trip Booking – Top Three Periods						
Jan-March 2011	30	32	34	31	33	33
Apr-June 2011	26	23	21	22	23	30
Oct-Dec 2010	17	20	23	21	22	17
Internet and Travel Agent Usage						
Used internet	81	82	83	81	75	84
Booked over internet	56	55	55	52	41	61
Booked through travel agent	47	52	58	55	43	25
Other Sources – Top 10						
Friends/family	50	52	52	49	33	47
Cruise line	37	34	40	36	22	3
Prior experience	24	21	17	21	31	30
Brochures	23	30	32	28	37	43
AAA	16	23	25	23	25	16
Travel/guide book	12	20	22	19	23	28
Tour company	7	12	13	13	12	4
Television	6	7	8	7	10	11
Magazine	6	8	8	8	10	13
Hotel/lodge	5	7	8	7	9	8

TABLE 5.76 - Demographics
Interior Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Origin						
Western US	36	27	23	23	23	36
Southern US	22	23	24	23	13	18
Midwestern US	14	21	22	23	18	12
Eastern US	11	14	15	16	14	11
Canada	7	6	5	6	15	6
Other International	10	10	10	9	17	17
Other Demographics						
Average party size	2.5	2.4	2.5	2.3	2.4	2.6
Average group size	5.1	5.1	5.4	5.3	3.9	3.9
Male/female	50/50	49/51	48/52	49/51	51/49	54/46
Average age	50.7	52.0	52.7	53.4	52.9	50.5
Children in household	24	20	19	19	14	23
Retired/semi-retired	41	45	47	48	53	42
College graduate	60	62	62	62	60	59
Average income	$107,000	$104,000	$105,000	$103,000	$95,000	$93,000

TABLE 5.77 - Visitor Expenditures, Per Person Interior Communities

	All Visitors	Interior	Denali	Fairbanks	Tok	Glennallen
Average per-person total spent in Alaska	$941	$1,279	$1,285	$1,275	$1,220	$2,067
Average per-person total spent in region/ community		389	236	354	88	88
Lodging		121	61	146	26	15
Tours/activity/ entertainment		75	81	44	-	9
Gifts/souvenirs/ clothing		50	27	43	7	3
Food/beverage		90	47	76	22	18
Rental cars/fuel/ transportation		39	7	40	32	42
Other		14	13	5	1	1

Note: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profiles: Southwest & Far North

This chapter profiles visitors to the Southwest and Far North regions, as well as visitors to Kodiak.

TABLE 5.78 - Market Definition and Sample Size
Southwest & Far North Communities

Market	Definition	Sample Size	Maximum Margin of Error
Southwest	Visited at least one destination in the Southwest region, day and/or overnight	268	±6.0%
Kodiak	Visited Kodiak, day and/or overnight	127	8.7
Far North	Visited at least one destination in the Far North region, day and/or overnight	177	7.4

The Southwest attracted 4 percent of the visitor market in summer 2011, while the Far North attracted 2 percent. Kodiak also attracted 2 percent. Small sample sizes suggest caution when viewing the results in this chapter.

The Southwest visitor market is distinctive in several ways.

- VFRs and business travelers were more common to the Southwest region than to the total visitor market as a whole. Still, two-thirds traveled for vacation/pleasure. The average length of stay among Southwest visitors was 13.3 nights, versus 9.2 nights among total visitors.
- Two-thirds traveled by air, compared to just over a third of total visitors. Also, 55 percent reported traveling between communities via air, much greater than the overall market (11 percent).
- Southwest visitors were more likely to stay at a hotel/motel (49 percent), lodge (28 percent), or private home (22 percent) when compared to all visitors.
- Southwest visitors were most likely to participate in wildlife viewing, fishing, and cultural activities while in the region.
- Over half said they were very likely to return to the state in the next five years, versus 38 percent of total visitors. Three out of five had previously traveled to Alaska for vacation.
- Thirty-eight percent booked their travel arrangements between April and June 201, whereas just one-quarter of total visitors booked that late in the year. Southwest visitors were less likely to book through a travel agent than total visitors (33 percent vs. 47 percent).
- Nearly two-thirds of Southwest visitors were male.
- Average annual income among Southwest visitors was $117,000, somewhat higher than the $107,000 average among all visitors.

- Southwest visitors reported higher total spending levels than the overall market at $1,514 per person (compared to $941 among all Alaska visitors).

Kodiak visitors shared most of the same characteristics as Southwest visitors, although they were slightly more likely to have purchased a fishing package, and slightly less likely to have purchased a wilderness lodge package.

The Far North visitor market differed in some unique ways.

- One out of five Far North visitors were business travelers and 12 percent were traveling for business/pleasure. Just 60 percent were traveling for vacation/pleasure and 43 percent purchased a multi-day package, versus two-thirds of total visitors.
- The average length of stay among Far North travelers was 13.5 nights. Eight out of ten lodged in a hotel/motel on their stay, in contrast to 38 percent of total visitors. Nearly two-thirds traveled between communities by air, compared to just 11 percent of the overall market.
- The most popular activities while visiting the Far North region were wildlife viewing, cultural activities, and hiking/nature walk. Only 6 percent of visitors went fishing while in the region.
- Also similar to Southwest travelers, Far North visitors reported an average annual income of $117,000, somewhat higher than the total market.
- Far North visitors reported spending an average of $1,820 while in Alaska, much higher than the average visitor ($941).

TABLE 5.79 - Trip Purpose and Packages
Southwest and Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Trip Purpose				
Vacation/pleasure	77	66	62	60
Visiting friends/rel.	14	16	19	7
Business only	5	12	13	20
Business/pleasure	4	6	6	12
Purchased multi-day package				
Yes	66	51	52	43
Package type (Base: non-cruise, purchased package)				
Fishing lodge	44	59	69	19
Wilderness lodge	16	19	12	27
Adventure tour	13	13	18	16
Motorcoach tour	10	2	-	22
Rail package	9	4	-	-
Rental car/RV package	6	-	-	3
Other	2	1	-	13

TABLE 5.80 - Transportation Modes
Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Transportation Market				
Cruise	57	30	41	27
Air	39	67	56	62
Highway/ferry	4	3	3	11
Used to Travel Between Communities				
Motorcoach/bus	25	11	7	35
Train	22	11	9	32
Rental vehicle	15	21	11	24
Personal vehicle	11	10	10	11
Air	10	48	40	59
State ferry	3	4	3	5
Rental RV	2	<1	<1	4
Personal RV	1	2	1	5

TABLE 5.81 - Length of Stay, Destinations and Lodging Type Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Average length of stay in Alaska	9.2 nights	13.3 nights	13.5 nights	13.5 nights
Regions Visited				
Southeast	68	38	49	36
Southcentral	56	84	81	87
Interior	33	25	11	67
Southwest	4	100	100	8
Far North	2	4	3	100
Destinations Visited, Top 10				
Juneau	61	33	44	33
Ketchikan	58	32	44	30
Skagway	49	9	4	33
Anchorage	49	83	81	82
Denali	28	19	6	51
Glacier Bay	24	8	7	19
Seward	22	16	4	33
Fairbanks	21	12	7	63
Whittier	14	14	11	24
Talkeetna	13	12	4	24
Lodging Types Used				
Cruise ship	56	30	41	27
Hotel/motel	38	49	36	79
Lodge	19	28	15	33
Private home	16	22	22	12
Campground/RV	6	4	3	17
B&B	5	9	5	8
Wilderness camping	3	8	3	10
Other	5	15	15	19

TABLE 5.82 - Statewide Activities – Top 10 Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Shopping	69	57	61	62
Wildlife viewing	52	64	64	64
City/sightseeing tours	39	31	37	43
Train	38	19	16	36
Hiking/nature walk	38	55	56	57
Day cruises	36	31	31	33
Museums	27	30	37	42
Historical/cultural attractions	25	27	27	33
Fishing	20	42	40	16
Visiting friends/relatives	19	25	25	16

TABLE 5.83 - Activities in Community/Region Southwest & Far North (%)

	Southwest	Kodiak	Far North
Wildlife viewing	49	44	38
Birdwatching	13	13	14
Fishing	41	43	6
Unguided	25	30	6
Guided	19	18	-
Cultural activities	38	45	37
Museums	21	32	13
Historical/cultural attractions	19	21	15
Native cultural tours/act.	6	6	22
Gold panning/mine tour	1	-	4
Hiking/nature walk	38	41	27
Visiting friends/relatives	23	26	9
City/sightseeing tours	18	23	18
Flightseeing	11	8	18
Camping	5	4	12
ATV/4-wheeling	4	6	9
Day cruises	4	5	-
Kayaking/canoeing	2	2	-
Biking	1	1	3
Hunting	1	1	3
Salmon bake	1	-	4
Shows/Alaska entertainment	<1	-	-
Rafting	<1	-	7
Northern lights viewing	-	-	8
Other	9	8	9

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

TABLE 5.84 - Satisfaction Ratings
Southwest and Far North Communities (%)

	All Visitors		Southwest		Kodiak		Far North	
Compared to expectations								
Much higher	26		23		21		37	
Higher	37		40		39		28	
About as expected	34		34		36		33	
Value for the money, compared to other destinations								
Much better	13		11		13		14	
Better	24		28		30		17	
About the same	50		43		42		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)								
Overall experience in Alaska	71	4.7	69	4.6	73	4.7	66	4.6
Friendliness of residents	69	4.6	69	4.6	69	4.6	69	4.6
Sightseeing	67	4.6	61	4.5	63	4.6	67	4.7
Tours and activities	63	4.6	59	4.5	56	4.5	62	4.5
Wildlife viewing	55	4.4	58	4.5	54	4.4	60	4.5
Accommodations	53	4.4	35	4.2	38	4.3	30	4.1
Visitor information services	52	4.4	48	4.3	46	4.4	57	4.5
Transportation within Alaska	47	4.4	37	4.2	31	4.1	44	4.4
Restaurants	37	4.2	23	4.0	25	4.0	23	4.0
Value for the money	32	4.0	31	4.0	34	4.1	28	3.9
Shopping	29	4.0	25	3.9	25	4.0	28	4.0
Very likely to recommend Alaska as a vacation destination	78		82		83		70	
Very likely to return to Alaska in the next five years	38		58		56		44	

TABLE 5.85 - Previous Alaska Travel
Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Been to Alaska before for vacation	38	60	61	43
Average # of vacation trips (base: repeaters)	5.0	6.0	5.9	3.4
Previous mode of transportation used to enter/exit Alaska				
Air	71	81	76	80
Cruise	29	24	35	16
Highway	9	6	5	9
Ferry	3	3	3	4

TABLE 5.86 - Trip Planning
Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Trip Decision – Top Three Periods				
Jan-March 2011	26	23	17	25
Jul-Sept 2010	19	14	11	19
Oct-Dec 2010	18	13	14	11
Trip Booking – Top Three Periods				
Jan-March 2011	30	29	25	28
Apr-June 2011	26	38	41	32
Oct-Dec 2010	17	10	11	14
Internet and Travel Agent Usage				
Used internet	81	85	85	87
Booked over internet	56	64	67	57
Booked through travel agent	47	33	30	41
Other Sources – Top 10				
Friends/family	50	51	51	43
Cruise line	37	19	24	18
Prior experience	24	38	36	24
Brochures	23	16	14	28
AAA	16	19	24	16
Travel/guide book	12	11	6	17
Tour company	7	5	3	14
Television	6	5	7	11
Magazine	6	6	6	7
Hotel/lodge	5	10	7	8

TABLE 5.87 - Demographics
Southwest & Far North Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Origin				
Western US	36	46	46	30
Southern US	22	22	21	26
Midwestern US	14	9	11	16
Eastern US	11	11	13	10
Canada	7	2	3	7
Other International	10	11	7	11
Other Demographics				
Average party size	2.5	2.3	2.2	2.1
Average group size	5.1	3.5	3.2	2.8
Male/female	50/50	61/39	59/41	57/43
Average age	50.7	52.4	53.7	50.4
Children in household	24	19	19	27
Retired/semi-retired	41	40	46	34
College graduate	60	61	53	61
Average income	$107,000	$117,000	$108,000	$117,000

TABLE 5.88 - Visitor Expenditures, Per Person Southwest & Far North Communities

	All Visitors	Southwest	Kodiak	Far North
Average per-person total spent in Alaska	$941	$1,514	$1,110	$1,820
Average per-person total spent in region/ community		476	386	251
Lodging		65	46	60
Tours/activity/ entertainment		63	70	28
Gifts/souvenirs/ clothing		41	45	19
Food/beverage		87	92	62
Rental cars/fuel/ transportation		50	48	51
Other		170	85	31

Note: Excludes transportation to/from Alaska. "Other" includes multi-day packages attributable to one community, usually sport-fishing lodge packages.

Summary Profile: Sportfishing

Sportfishing has continued to be a popular activity among Alaska visitors, with 20 percent participating in either guided fishing (11 percent) or unguided fishing (10 percent). (One percent participated in both.) This chapter profiles those who participated in sportfishing, sectioned into guided and unguided. Sample sizes are presented in the table below.

TABLE 5.89 - Market Definition and Sample Size
Sportfishing

Market	Definition	Sample Size	Maximum Margin of Error
Guided fishing	Participated in guided fishing	1,014	±3.1%
Unguided fishing	Participated in unguided fishing	1,137	2.9

Features of the sportfishing market differed significantly from the overall visitor market as well as between the two subgroups.

- While 82 percent of those that participated in guided fishing traveled to the state for the purpose of vacation/pleasure, just over half of unguided participants said their primary purpose was vacation/pleasure. Two out of five unguided participants were VFRs.
- Three out of five guided fishing participants purchased a package, compared to just one of five unguided participants. As expected, 86 percent of packages purchased by guided participants were fishing lodge packages.
- Nine out of ten unguided participants entered/exited Alaska by air, in contrast to just over one-third of the overall market and about two-thirds of guided participants.
- The sportfishing market yielded somewhat longer trip durations than the overall visitor market (9.2 nights), with the guided and unguided market averaging 10 and 12.9 nights, respectively.
- Nearly three-fourths of both guided and unguided participants visited the Southcentral region of Alaska.
- The sportfishing market reported similar levels of participation in other activities as found in the overall market.
- Unguided participants were somewhat more likely to wait and book their travel arrangements between April and June 2011 than guided participants (36 percent vs. 26 percent).
- Seventy percent of unguided participants said they were very likely to return to Alaska in the next five years, compared to half of guided participants and just 38 percent of total visitors. Correspondingly, nearly two-thirds of unguided participants and just under half of guided participants said they have been to Alaska previously for vacation.

- The guided market reported a significantly higher average annual income of $120,000, while the unguided market reported $105,000.

TABLE 5.90 - Transportation Market, Trip Purpose and Packages Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Trip Purpose			
Vacation/pleasure	77	82	52
Visiting friends or relatives	14	13	40
Business	5	<1	2
Business and pleasure	4	4	6
Purchased multi-day package			
Yes	66	60	19
Package type (Base: non-cruise, purchased package)			
Fishing lodge package	44	86	66
Wilderness lodge package	16	4	11
Adventure tour	13	4	9
Motorcoach tour	10	1	1
Rail Package	9	3	6
Rental car/RV package	6	1	7
Other	2	1	-

TABLE 5.91 - Transportation Modes Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Transportation Market			
Cruise	57	32	6
Air	39	64	87
Highway/ferry	4	4	7
Used to Travel Between Communities			
Motorcoach/bus	25	18	5
Train	22	17	5
Rental vehicle	15	31	24
Personal vehicle	11	14	36
Air	10	19	19
State ferry	3	3	5
Rental RV	2	3	5
Personal RV	1	4	3

TABLE 5.92 - Length of Stay, Destinations and Lodging Type Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Average length of stay in Alaska	9.2 nights	10.0 nights	12.9 nights
Regions Visited			
Southeast	68	52	32
Southcentral	56	72	74
Interior	33	33	26
Southwest	4	8	7
Far North	2	2	2
Destinations Visited, Top 10			
Juneau	61	36	13
Ketchikan	58	37	15
Anchorage	49	65	65
Skagway	49	29	7
Denali	28	28	16
Glacier Bay	24	9	4
Seward	22	36	31
Fairbanks	21	16	13
Whittier	14	16	12
Talkeetna	13	16	11
Lodging Types Used			
Cruise ship	56	30	6
Hotel/motel	38	49	36
Lodge	19	39	18
Private home	16	20	53
Campground/RV	6	11	15
B&B	5	11	8
Wilderness camping	3	4	10
Other	5	8	12

TABLE 5.93 - Visitor Activities – Top 10 Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Shopping	69	60	58
Wildlife viewing	52	58	56
City/sightseeing tours	39	27	13
Train	38	27	9
Hiking/nature walk	38	40	45
Day cruises	36	28	16
Museums	27	26	22
Historical/cultural attractions	25	21	18
Fishing	20	100	100
Visiting friends/relatives	19	22	56

TABLE 5.94 - Satisfaction Ratings
Sportfishing (%)

	All Visitors		Guided Sportfishing		Unguided Sportfishing	
Compared to expectations						
Much higher	26		26		23	
Higher	37		41		37	
About as expected	34		30		39	
Value for the money, compared to other destinations						
Much better	13		13		13	
Better	24		26		27	
About the same	50		45		45	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)						
Overall experience in Alaska	71	4.7	73	4.7	76	4.7
Friendliness of residents	69	4.6	66	4.6	65	4.6
Sightseeing	67	4.6	66	4.6	72	4.7
Tours and activities	63	4.6	63	4.5	63	4.5
Wildlife viewing	55	4.4	57	4.4	62	4.5
Accommodations	53	4.4	50	4.4	50	4.4
Visitor information services	52	4.4	47	4.3	48	4.3
Transportation within Alaska	47	4.4	44	4.4	43	4.3
Restaurants	37	4.2	38	4.2	36	4.1
Value for the money	32	4.0	29	3.9	31	4.0
Shopping	29	4.0	25	3.9	26	4.0
Very likely to recommend Alaska as a vacation destination	78		77		80	
Very likely to return to Alaska in the next five years	38		49		70	

TABLE 5.95 - Previous Alaska Travel
Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Been to Alaska before for vacation	38	47	64
Average # of vacation trips (base: repeat travelers)	5.0	5.3	8.8
Previous mode of transportation used to enter/exit Alaska			
Air	71	87	86
Cruise	29	18	6
Highway	9	5	11
Ferry	3	1	3

TABLE 5.96 - Trip Planning
Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Trip Decision – Top Three Periods			
Jan-March 2011	26	28	26
Jul-Sept 2010	19	22	21
Oct-Dec 2010	18	17	15
Trip Booking – Top Three Periods			
Jan-March 2011	30	35	27
Apr-June 2011	26	26	36
Oct-Dec 2010	17	16	11
Internet and Travel Agent Usage			
Used internet	81	85	81
Booked over internet	56	64	68
Booked through travel agent	47	32	13
Other Sources – Top 10			
Friends/family	50	55	71
Cruise line	37	25	4
Prior experience	24	29	43
Brochures	23	26	19
AAA	16	15	8
Travel/guide book	12	11	8
Tour company	7	6	1
Television	6	6	5
Magazine	6	8	6
Hotel/lodge	5	10	7

TABLE 5.97 - Demographics
Sportfishing (%)

	All Visitors	Guided Sportfishing	Unguided Sportfishing
Origin			
Western US	36	45	51
Southern US	22	24	21
Midwestern US	14	17	13
Eastern US	11	10	9
Canada	7	2	3
Other International	10	2	3
Other Demographics			
Average party size	2.5	3.0	2.6
Average group size	5.1	5.3	3.7
Male/female	50/50	61/39	64/36
Average age	50.7	48.0	46.9
Children in household	24	30	29
Retired/semi-retired	41	34	30
College graduate	60	61	53
Average income	$107,000	$120,000	$105,000

Summary Profiles:
Adventure, B&B, Independent Cruisers, Native Culture, Repeat Visitors, Group Travelers

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

TABLE 5.98 - Market Definition and Sample Size
Selected Visitor Markets

Market	Definition	Sample Size	Maximum Margin of Error
Adventure Package	Purchased a multi-day adventure travel package i.e. hiking, biking, kayaking, rafting	129	±8.6%
B&B	Spent at least one night in a B&B	517	4.3
Independent Cruisers	Spent nights in Alaska on their own before or after a cruise or cruise/tour package	356	5.2
Native Culture	Participated in one or more Native cultural tours/activities	1,098	3.0
Repeat Visitors	Traveled to Alaska previously	3,084	1.8
Group Travelers	Traveling in a group of six or more people	1,123	2.9

The "adventure package" market includes those that purchased a multi-day travel package that focused on adventure-oriented activities such as hiking, biking, kayaking, and rafting. The sample size of this group is significantly smaller than other subgroups examined in this report. Therefore, results should be viewed with some caution.

- The vast majority of adventure market visitors entered and exited Alaska by air (96 percent), significantly different from just over one-third of the overall market. Also, this group was more likely to travel between communities by air. Nearly one-quarter reported using this mode of travel, compared to 10 percent of total visitors.
- Adventure package visitors averaged longer trips than the total market (11.2 nights vs. 9.2 nights) and were significantly more likely to travel to the Southcentral region (85 percent vs. 56 percent) and the Interior region (65 percent vs. 33 percent). Less than one in five visited Southeast Alaska.
- One out of five adventure package purchasers participated in wilderness camping.
- Overall satisfaction with their Alaska experience was higher than the total visitor market (84 percent vs. 71 percent).
- Six out of seven said they are very likely to recommend Alaska as a vacation destination and over half said they are very likely to return within the next five years.

- Adventure package travelers were somewhat more likely to book their travel arrangements between January to March 2011 and April to June 2011 (36 percent each), versus the overall visitor market (30 percent and 26 percent, respectively).

The B&B market, those that stayed at least one night in a B&B during their trip to Alaska (5 percent of total visitors), showed a few differences than the overall visitor market.

- Just over one-third purchased multi-day packages, compared to two-thirds of the total visitor market.
- Similar to the adventure package market, B&B visitors were much more likely to enter/exit the state by air. One out of five participated in a cruise, much less than the overall market.
- Nearly two-thirds said they traveled between communities by rental vehicle, much higher than the 15 percent reported by total visitors.
- A large majority of the B&B market used the internet to do research for their trip (92 percent) and four out of five booked a portion of their trip via the internet.

The "Independent Cruise" market includes those that traveled around the state on their own before or after their cruise or cruise/tour package, just over one quarter of the total cruise market.

- Their average length of stay in Alaska was 11.7 nights, somewhat longer than the overall market. They were much more likely to travel between communities by motorcoach/bus or train. Additionally, the independent cruise market was much more likely to overnight in a hotel/motel or lodge than was the total visitor market.
- The vast majority visited Southeast and Southcentral Alaska (99 percent and 96 percent, respectively).
- The independent cruise market was more likely to participate in shopping (84 percent) and city/sightseeing tours (63 percent) or to take the train (72 percent), compared to the overall market.
- Less than one-quarter of independent cruisers indicated they would return to Alaska within the next five years.
- The independent cruise market reported an average income of $120,000, higher than the $107,000 average of total visitors.

The "Native Culture" market includes those that participated in a Native cultural tour or activity during their trip to Alaska, making up 17 percent of total visitors.

- Three-quarters of Native Culture visitors were cruise visitors, while 22 percent were air visitors and 3 percent were highway/ferry visitors.
- Four out of five said they purchased a multi-day package and over half traveled between Alaska communities by motorcoach/bus, notably higher than the overall market.

- This group was somewhat more likely to have visited the Southeast and Southcentral regions (82 percent and 70 percent, respectively, compared to total visitors (68 percent and 56 percent, respectively).

The "Repeat Visitors" market includes anyone that has traveled to Alaska previously, either for business or pleasure, 38 percent of the overall market.

- Over half of the repeat market was air visitors, while 36 percent were cruise visitors. Seven percent were highway/ferry visitors.
- Sixty percent of repeat visitors traveled for the purpose of vacation/pleasure, while one out of four were VFRs. Correspondingly, one-quarter overnighted in a private home.
- Less than half purchased a multi-day package, compared to two-thirds of total visitors. Of those that did, 62 percent purchased a fishing lodge package.
- Over half said they are very likely to return to Alaska in the next five years, compared to 38 percent of total visitors.
- Half of repeat visitors are from western US, versus 36 percent of total visitors.

"Group Travelers" are those traveling in a group of six or more people and account for just over one-fifth of the total visitor market.

- Three-quarters of group travelers were cruise visitors, 23 percent were air visitors, and just 1 percent were highway/ferry visitors.
- Eighty-three percent of group travelers purchased a multi-day package, somewhat higher than the average of total visitors.
- Group travelers were more likely to decide on their trips in the latter half of 2010 than total visitors (43 percent and 37 percent, respectively).
- Three out of five booked their trip through a travel agent, compared to 47 percent of total visitors.

TABLE 5.99 - Transportation Market, Trip Purpose and Packages Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Trip Purpose							
Vacation/pleasure	77	87	75	95	89	60	85
Visiting friends/rel.	14	12	15	2	6	24	8
Business only	5	1	3	-	2	11	2
Business/pleasure	4	-	6	3	2	5	4
Purchased multi-day package							
Yes	66	100	36	100	82	45	83
Package type (Base: non-cruise, purchased package)							
Fishing lodge	44	-	35	-	13	62	61
Wilderness lodge	16	-	21	-	23	11	5
Adventure tour	13	100	13	-	17	11	19
Motorcoach tour	10	-	8	-	27	3	7
Rail package	9	-	11	-	13	8	5
Rental car/RV package	6	-	7	-	5	4	3
Other	2	-	4	-	3	1	-

TABLE 5.100 - Transportation Modes Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Transportation Market							
Cruise	57	-	22	100	76	36	76
Air	39	96	70	-	22	56	23
Highway/ferry	4	4	8	-	3	7	1
Used to Travel Between Communities							
Motorcoach/bus	25	33	17	60	52	13	33
Train	22	22	18	58	45	12	28
Rental vehicle	15	31	61	26	14	17	9
Personal vehicle	11	17	15	5	6	18	8
Air	10	23	22	9	12	14	7
State ferry	3	9	14	1	5	4	2
Rental RV	2	6	2	2	2	2	1
Personal RV	1	2	1	1	1	2	1

TABLE 5.101 - Length of Stay, Destinations and Lodging Type Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Average length of stay in Alaska	9.2 nights	11.2 nights	10.8 nights	11.7 nights	10.1 nights	10.0 nights	8.8 nights
Regions Visited							
Southeast	68	18	45	99	82	52	82
Southcentral	56	85	85	96	70	60	51
Interior	33	65	59	63	56	28	32
Southwest	4	10	7	1	4	6	2
Far North	2	5	3	4	3	2	1
Destinations Visited, Top 10							
Juneau	61	16	29	95	76	41	75
Ketchikan	58	6	29	93	74	38	75
Anchorage	49	80	80	90	63	54	46
Skagway	49	3	25	87	64	30	63
Denali	28	57	52	62	53	18	29
Glacier Bay	24	7	8	29	30	11	19
Seward	22	46	54	48	36	20	23
Fairbanks	21	23	34	38	40	18	21
Whittier	14	19	16	39	23	10	15
Talkeetna	13	33	25	32	25	9	13
Lodging Types Used							
Cruise ship	56	-	21	97	71	35	73
Hotel/motel	38	73	59	83	53	40	34
Lodge	19	37	27	37	32	16	22
Private home	16	13	14	6	8	27	10
Campground/RV	6	19	9	3	5	8	3
B&B	5	9	100	13	6	5	3
Wilderness camping	3	21	5	<1	1	4	2
Other	5	19	12	4	5	7	5

TABLE 5.102 - Activities – Top 10 Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Shopping	69	61	71	84	80	62	75
Wildlife viewing	52	78	73	74	74	47	54
City/sightseeing tours	39	27	29	63	67	26	48
Train	38	25	26	72	59	21	47
Hiking/nature walk	38	80	63	54	53	37	35
Day cruises	36	41	41	45	48	22	31
Museums	27	41	43	45	53	21	25
Historical/cultural attractions	25	23	36	42	61	21	29
Fishing	20	25	38	17	11	28	21
Visiting friends/relatives	19	17	29	14	14	32	12

TABLE 5.103 - Satisfaction Ratings
Selected Visitor Markets (%)

	All Visitors		Adventure Package		B&B		Indep. Cruisers		Native Culture		Repeat		Group Travelers	
Compared to expectations (Base: excludes business-only travelers)														
Much higher	26		30		27		32		35		18		24	
Higher	37		40		36		40		43		34		41	
About as expected	34		31		36		25		20		46		32	
Value for the money, compared to other destinations (Base: excludes business-only travelers)														
Much better	13		11		9		12		15		13		12	
Better	24		33		19		24		25		25		24	
About the same	50		43		46		47		47		48		51	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)														
Overall experience in Alaska	71	4.7	84	4.8	72	4.7	74	4.7	78	4.8	69	4.7	71	4.7
Friendliness of residents	69	4.6	68	4.6	70	4.6	74	4.7	76	4.7	67	4.6	68	4.6
Sightseeing	67	4.6	72	4.7	66	4.6	70	4.7	74	4.7	66	4.6	64	4.6
Tours and activities	63	4.6	76	4.7	61	4.6	62	4.5	66	4.6	64	4.6	60	4.5
Wildlife viewing	55	4.4	74	4.7	65	4.6	61	4.4	62	4.5	57	4.4	53	4.3
Accommodations	53	4.4	41	4.3	41	4.3	49	4.4	51	4.4	51	4.4	57	4.5
Visitor information services	52	4.4	35	4.3	52	4.3	53	4.4	57	4.5	51	4.4	48	4.4
Transportation within Alaska	47	4.4	55	4.4	79	4.3	60	4.5	57	4.5	45	4.3	47	4.4
Restaurants	37	4.2	24	4.0	32	4.0	35	4.2	34	4.1	37	4.2	39	4.2
Value for the money	32	4.0	29	3.9	21	3.7	26	3.9	32	4.1	32	4.0	31	4.1
Shopping	29	4.0	17	3.8	25	3.8	31	4.0	31	4.0	29	4.0	28	4.0
Very likely to recommend Alaska as a vacation destination	78		85		73		80		82		79		77	
Very likely to return to Alaska in the next five years	38		52		43		23		27		58		29	

TABLE 5.104 - Previous Alaska Travel
Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Been to Alaska before for vacation	38	43	39	23	26	100	32
Average # of vacation trips (base: repeaters)	5.0	5.4	5.5	2.0	3.2	5.0	4.0
Previous mode of transportation used to enter/exit Alaska							
Air	71	89	81	75	68	71	70
Cruise	29	26	17	53	39	29	40
Highway	9	1	11	6	12	9	8
Ferry	3	1	5	6	5	3	3

TABLE 5.105 - Trip Planning
Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Independent Cruisers	Native Culture	Repeat	Group Travelers
Trip Decision – Top Three Periods							
Jan-March 2011	26	29	28	28	25	26	25
Jul-Sept 2010	19	23	19	16	19	22	25
Oct-Dec 2010	18	12	15	20	20	16	19
Trip Booking – Top Three Periods							
Jan-March 2011	30	36	34	37	35	27	34
Apr-June 2011	26	36	26	19	23	29	17
Oct-Dec 2010	17	15	13	23	22	14	21
Internet and Travel Agent Usage							
Used internet	81	92	92	90	84	79	77
Booked over internet	56	70	79	64	56	60	49
Booked through travel agent	47	23	25	71	61	33	60
Other Sources – Top 10							
Friends/family	50	46	52	54	56	44	50
Cruise line	37	6	19	62	52	22	47
Prior experience	24	21	28	16	17	59	19
Brochures	23	26	36	30	31	18	22
AAA	16	13	16	26	25	12	17
Travel/guide book	12	16	24	23	22	7	11
Tour company	7	16	6	15	13	4	11
Television	6	8	4	7	8	4	6
Magazine	6	8	6	9	7	6	6
Hotel/lodge	5	5	12	7	6	6	4

TABLE 5.106 - Demographics
Selected Visitor Markets (%)

	All Visitors	Adventure Package	B&B	Indep. Cruisers	Native Culture	Repeat	Group Travelers
Origin							
Western US	36	40	36	21	26	51	32
Southern US	22	24	23	28	25	18	22
Midwestern US	14	13	12	20	22	11	19
Eastern US	11	11	11	15	12	8	11
Canada	7	2	5	5	7	8	7
Other International	10	10	13	13	9	4	10
Other Demographics							
Average party size	2.5	2.4	2.6	2.7	2.6	2.4	3.5
Average group size	5.1	5.8	3.4	5.7	5.7	4.3	14.9
Male/female	50/50	59/41	53/47	48/52	45/55	54/46	49/51
Average age	50.7	46.3	49.3	49.9	51.9	51.3	46.7
Children in household	24	18	23	31	22	22	30
Retired/semi-retired	41	28	38	44	51	44	42
College graduate	60	73	66	62	67	62	60
Average income	$107,000	$108,000	$109,000	$120,000	$108,000	$110,000	$109,000

Section VI: Methodology

Total Traffic

The process of counting visitors to Alaska starts with traffic data for people exiting the state. The following table shows each exit point, along with the type and source of the data. The summer period consists of May 1 through September 30.

TABLE VI.1 - AVSP Visitor Exit Points and Data Sources

Exit Point	Type of Data	Sources of Data
Domestic Air		
Anchorage	Enplaning passengers exiting the state	Anchorage International Airport; Alaska Airlines
Fairbanks	Enplaning passengers exiting the state	Fairbanks International Airport; Alaska Airlines
Juneau	Enplaning passengers exiting the state	Alaska Airlines
Ketchikan	Enplaning passengers exiting the state	Alaska Airlines
Sitka	Enplaning passengers exiting the state	Alaska Airlines
Other	Enplaning passengers exiting the state	Alaska Airlines
International Air		
Anchorage	Enplaning passengers exiting the state	Anchorage International Airport
Fairbanks	Enplaning passengers exiting the state	Fairbanks International Airport
Highway		
Fraser Border Station (Klondike Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Pleasant Border Station (Haines Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Beaver Creek Border Station (Alcan Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Little Gold Border Station (Top of the World Highway)	Occupants of private vehicles, motorcoaches, and commercial vehicles crossing the border	Yukon Department of Tourism and Culture
Cruise Ship		
All southbound ships	Cruise ship passengers sailing southbound from Alaska ports to Canada/US ports	Cruise Line Agencies of Alaska
Ferry		
Bellingham	Ferry passengers disembarking at Bellingham	Alaska Marine Highway System
Prince Rupert	Ferry passengers disembarking at Prince Rupert	Alaska Marine Highway System

Because all commercial airlines besides Alaska Airlines only fly directly out-of-state, enplanement data from Anchorage and Fairbanks airports was used to determine exiting passengers aboard non-Alaska Airlines flights. Alaska Airlines, which operates flights within Alaska as well as out-of-state, provided an exact count of outbound passengers for each exit point.

Visitor/Resident Ratios

In order to estimate total visitor traffic, visitor/resident ratios were applied to the total traffic data. A visitor/resident ratio is the proportion of out-of-state visitors to Alaska residents for each exit mode. For most exit points, these ratios were collected in the form of "tallies" at the same time surveys were conducted. McDowell Group surveyors tallied a total of 54,605 people as they were exiting Alaska. The following table shows the number of people tallied for each exit mode.

TABLE VI.2 - Visitor/Resident Tally Contacts, by Mode

Exit Mode	Passengers Tallied
Domestic Air	43,333
International Air	6,034
Highway	5,238
Ferry[1]	0
Cruise ship[2]	0
Total	**54,605**

[1] The Alaska Marine Highway System provided exact counts of exiting non-residents, making tallies unnecessary.
[2] As in previous AVSP studies, 100 percent of cruise passengers were assumed to be out-of-state visitors.

All exiting passengers were assumed to be leaving Alaska for the last time (meaning, not re-entering on the same trip), with the exception of highway travelers. Highway traffic had to be adjusted for "last exit" visitors, because some of the traffic recorded in border crossing data re-enters Alaska and exits a second time – for example, many highway visitors exit Alaska on the Alcan Highway, drive to Skagway, and exit the state a second time via the Alaska Marine Highway. This issue is explained further in the highway section, below.

Domestic and International Air

For each flight selected for surveying (see **Sampling Procedures**, below), a surveyor would stand directly outside the jetway before boarding.[1] As passengers boarded, the surveyor would ask, "Are you an Alaska resident?" and their response was recorded. Every passenger boarding each selected flight was tallied.

For the domestic air mode, ratios were compiled by location, by month, and applied to passenger enplanement data by location, by month.[2] International air ratios were compiled by location, by airline, and applied to passenger enplanement data by location and airline.

[1] The one exception to this collection method occurred in Sitka, where the infrequency of flights and small size of the boarding area allowed both surveys and tallies to be conducted outside of the secure area. Tallies were conducted as passengers waited in line to go through security.
[2] Because passengers flying directly out of state from "other" destinations (Petersburg, Wrangell, Yakutat, and Cordova) were not sampled in the survey, tallies were not conducted for these exit points. The visitor/resident ratio for these passengers was based on a compilation of Juneau, Ketchikan, and Sitka ratios.

Highway

Highway tallies were collected during all survey sample periods. Shifts were typically six to eight hours long. Survey/tally stations were set up on the U.S. side of the border at nearby pullouts on three highways: Alcan, Haines Highway, and Klondike Highway. Because of the remote location and harsh driving conditions on the Top of the World Highway, visitors exiting Alaska via that highway were intercepted on the Taylor Highway, just north of Tetlin Junction.

In addition to the standard visitor/resident question, highway travelers were asked: "Are you re-entering Alaska on this trip?" The final ratio that was applied to traffic data reflected only "last exit" visitors, to avoid double-counting of those travelers who were re-entering Alaska and exiting by another mode or a different highway. Visitor/resident ratios were applied to exiting personal vehicle traffic by location.

There were two highway modes that, as in previous AVSPs, were not sampled: motorcoaches and commercial vehicles. This is due to the difficulty in intercepting these types of vehicles on the highway. Visitor/resident ratios for these modes from 2006 were repeated for 2011. Because visitor traffic among these two highway modes is so small, representing 0.2 percent of all visitors, they are combined with other highway traffic for the purposes of the visitor volume estimate.

Cruise Ship

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

Ferry

The Alaska Marine Highway System provides exact counts of non-residents disembarking at Bellingham and Prince Rupert, making visitor/resident tallies unnecessary.

Survey Population

The AVSP Summer 2011 survey was conducted with out-of-state visitors who were exiting Alaska between May 1 and September 30, 2011. Seasonal residents, such as cannery and oil field workers, were screened out of the survey. The following table shows how respondents were selected, by exit mode.

TABLE VI.3 - AVSP Target Survey Population, by Mode

Exit Mode	Target Survey Population
Domestic Air	Boarding flight bound for non-Alaska, domestic destination
International Air	Boarding flight bound for international destination
Highway	About to cross Alaska/Canada border; not intending to re-enter Alaska
Cruise Ship	Boarding cruise ship at its final Alaska port-of-call
Ferry	Embarking or onboard ferry at Ketchikan; bound for Prince Rupert or Bellingham

Survey Design

AVSP VI utilized an intercept survey instrument. The McDowell Group study team designed the survey with input from the Alaska Department of Commerce, Community, and Economic Development and the Alaska Travel Industry Association. The vast majority of survey questions were based on those used in AVSP V. A few questions were modified for the purposes of clarity, and several new questions were added.

Survey Staff

The AVSP Summer 2011 survey staff included 40 surveyors based in the following locations: Anchorage, Fairbanks, Juneau, Ketchikan, and Sitka. Many of the surveyors had previously worked on AVSP V as well as other visitor surveys for McDowell Group. Surveyors underwent extensive training in proper data collection procedures. Consistent training assured that all surveys were administered in the same way to minimize bias. Japanese and Korean interpreters were employed for Japan Air and Korean Air flights. The Anchorage International Airport survey crew also included fluent speakers of German and Spanish. Surveyors in airports, on cruise ship docks, and at the ferry terminal wore name badges and uniforms. Highway surveyors wore name tags and reflective vests.

Survey Locations

The following table shows where surveys were conducted. These exit locations account for virtually 100 percent of visitors exiting Alaska. The limited number of visitors using other modes and locations does not warrant including them in the sample.[3] In every survey location besides highway stations, online invitation cards were also distributed.

TABLE VI.4 - AVSP Survey Locations

Exit Mode	Survey Location
Domestic Air	
	Anchorage International Airport
	Fairbanks International Airport
	Juneau International Airport
	Ketchikan International Airport
	Sitka Airport
International Air	
	Anchorage International Airport
	Fairbanks International Airport
Highway	
	Klondike highway (near US border station)
	Haines highway (near US border station)
	Alcan highway (near US border station)
	Taylor highway (north of Tetlin Junction)
Cruise Ship	
	Ketchikan cruise ship docks
	Skagway cruise ship docks
	Sitka cruise ship lightering docks
Ferry	
	In the Ketchikan ferry terminal and onboard ferries docked in Ketchikan, bound for Bellingham and Prince Rupert

[3] Un-sampled exit modes include: motorcoaches, commercial vehicles, private planes, private boats, pedestrians, and airplane passengers flying directly out-of-state from Cordova, Yakutat, Petersburg, and Wrangell.

Sample Sizes

The AVSP Summer 2011 survey program included 3,563 intercept surveys (in-person interviews) and 3,184 surveys completed online, for a total of 6,747 surveys. The following table shows the number of completed surveys, by exit mode.

TABLE VI.6 - Sample Sizes, by Mode

Exit Mode	Intercept	Online	Total
Domestic Air	1,932	2,217	4,149
International Air	427	464	891
Highway[1]	356	0	356
Cruise Ship	650	433	1,083
Ferry	198	70	268
Total	**3,563**	**3,184**	**6,747**

[1] Highway travelers were intentionally not targeted for online surveying. Highway travelers' logistically complex trips make the online survey more difficult to complete; in addition, distributing cards to motorists is less time-efficient than in the other modes.

Sampling Procedure

The sampling process starts with creating a target number of intercept surveys, by month, for each mode and exit point. These targets were largely based on estimated traffic volume. The sample targets were adjusted to ensure appropriate sample sizes. For example, visitors exiting by ferry represent only 0.6 percent of all visitors. If they were represented proportionally in the sample, the target would be too small for analysis (21 out of 3,500 surveys). The ferry target became 170 surveys. Similarly, the international air sample was adjusted upwards because there was particular interest in this market on the part of the State and the visitor industry. These visitors represent 1.1 percent of total exiting visitors, but had a target of 350 surveys.

After sample targets were determined for each mode and exit point, monthly targets were determined based on traffic volume, and daily targets based on expected visitor frequency and surveyor capacity. Survey days were selected by month, based on a random start.

Following are more specific sampling procedures for each exit mode.

Domestic and International Air

The air samples were created using flight schedules for all airlines carrying passengers out of the state. For each sample day, flights were selected based on a random start. For each flight that was selected, surveyors had a target number of surveys to complete among boarding passengers. Surveyors would approach randomly selected passengers in the boarding area and complete the required number of surveys. All surveyors were badged, which allowed them into the secure area of the airport.

Highway

The highway sample was based on traffic levels at each of the four border stations. Survey stations were set up in pullouts near the Alaska/Canada borders on three highways (Alcan, Haines Highway, and Klondike Highway), and north of Tetlin Junction on the Taylor Highway (for visitors exiting Alaska via the Top of the World Highway). Surveyors would work in six to eight-hour shifts on each sample day. As motorists approached the border (or after turning onto the Taylor Highway), they were directed by signs to pull over to the side of the road, where surveyors would conduct their tally of all motorists, and would randomly select respondents for the intercept survey. Highway travelers who were re-entering Alaska on the same trip were screened out of the survey.

McDowell Group was issued permits to conduct the surveys by the Alaska Department of Transportation and Public Facilities. Signage was in accordance with DOTPF regulations.

Cruise Ship

The cruise ship sample was selected based on the expected volume of passengers at each "last port of call" in Alaska – that is, every port that represented the final stop before the ship exited Alaska, and continued on to non-Alaska ports. Cruise Line Agencies of Alaska provided the 2011 cruise ship schedule, including each ship's route and capacity. Although Ketchikan represented the bulk of exiting passengers, Skagway was also a last port-of-call for many passengers, with Sitka being the last port for one ship only. The appropriate number of surveys was conducted in each of these three locations to reflect actual exiting volume. Survey targets also reflected passenger volume by cruise line – for example, if 30 percent of all exiting cruise passengers were expected to be sailing with Princess Cruises, 30 percent of the targeted ships were Princess ships.

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

Ferry

Ferry passengers were surveyed in the Alaska Marine Highway terminal, and waiting in vehicles outside the terminal, in Ketchikan prior to boarding vessels bound for Bellingham and Prince Rupert. Surveyors also conducted surveys onboard the same vessels while the ship was docked, to capture visitors who had embarked in other ports. Sampled vessels were selected randomly by month among all southbound voyages.

Online Component

The AVSP VI survey methodology included an online sample in addition to the intercept sample. The online sample was collected by distributing "invitation cards" to visitors during intercept sample periods (see image, below). The color-printed postcard contained a message from the Governor inviting visitors to share information about their trip over the internet (see below). Recipients were directed to a web address, and each postcard had a unique password. Respondents would then go online and self-administer the survey. The back of the card contained translations of the front side in three languages: German, Spanish, and Japanese. The links would take respondents to translated versions of the survey.

For every intercept survey that was completed, surveyors distributed a target number of invitation cards. Cards were distributed to visitors departing on the same flights, ferry voyages, and cruise sailings as intercept respondents.

The online survey was designed to mirror the intercept survey to the greatest extent possible. Questions were asked in the same order, with nearly identical wording to the intercept survey. More explicit directions were necessary for some questions to minimize confusion. If respondents had questions or difficulties filling out the survey, there was a link on the bottom of each screen to contact the Help Desk.

The online method allowed for certain efficiencies not possible in the intercept format such as automated skip patterns. Destinations visited were automatically linked to a personalized menu as respondents progressed to the activities and expenditures sections. In addition, the self-administered format eliminated the need for data entry.

Response Rates

Response rates show the percentage of people who completed a survey out of the total number of people targeted.

In intercept surveys, the response rate is the number of total surveys, divided by the number of qualified, targeted respondents approached by surveyors. For example, for the Domestic Air mode, there were 2,159 qualified respondents – that is, out-of-state residents who were exiting Alaska. Of this number, 1,928 agreed to be interviewed. The response rate for Domestic Air is 1,928 divided by 2,159, or 89 percent.

For the online survey, the response rate is the number of people who completed the online survey, out of the total number of people who received invitation cards. (Only out-of-state visitors exiting Alaska were given cards.) For example, there were 20,787 cards distributed to visitors exiting the state via Domestic Air. Of these visitors, 2,210 completed the online survey. The response rate for Domestic Air online respondents is 2,210 divided by 20,787, or 10.6 percent.

TABLE VI.7 - Response Rates, by Mode

Exit Mode	Intercept	Online
Domestic Air	89.3%	10.6%
International Air	75.4%	12.5%
Highway[1]	82.8%	n/a
Cruise ship	80.4%	7.1%
Ferry	91.4%	10.2%
Total	**85.1%**	**10.2%**

[1] Highway travelers were intentionally not targeted for online surveying. Highway travelers' logistically complex trips make the online survey more difficult to complete; in addition, distributing cards to motorists is less time-efficient than in the other modes.

The overall response rate for the intercept sample was 85.1 percent. As in 2006, rates differ somewhat by mode. Domestic air and ferry respondents generally show the highest intercept response rates because they often have plenty of time (and little to do) while they are waiting for their flight or vessel to depart. Cruise passengers show slightly lower response rates – they are approached as they return to their ship, occasionally in inclement weather, and can be anxious to embark.

Online response rates also correspond to expectations for each exit mode. Ferry and cruise ship passengers are often several days (or longer) from returning home when they receive the invitation card. This makes them more likely to lose the card or forget about it when compared to air passengers, who most often return home within a day or two.

Intercept response rates in 2011 closely resembled those in 2006. Domestic Air and International Air response rates each shifted down slightly (from 92.0 percent to 89.3 percent for Domestic Air and from 81.5 percent to 75.4 percent for International Air) while the Cruise Ship rate went up (from 72.3 percent to 80.4 percent). Overall, the rate was very similar, dropping only slightly from 85.6 percent to 85.1 percent.

Response rates for the online sample dropped significantly compared to 2006: from 17.5 percent to 10.2 percent, all modes combined. The rates dropped in each mode. Reasons for the lower response rate are unclear. Possibilities include decreased appeal of the incentives offered, or fatigue from too many online surveys.

Although response rates differ by mode and by survey method, the data is not adversely affected. As explained in **Data Weighting**, below, all data is weighted according to actual traffic volumes by mode and location.

Incentives

Incentives are commonly used in surveys to maximize response rates. For AVSP VI, incentives were used in both the intercept and online surveys. Intercept respondents were given an Alaska keepsake pin. Online respondents were entered into a monthly drawing to win an Alaska Railroad overnight package. All summer respondents were also entered into a drawing for a Princess Cruises cruise package to Mexico or the Caribbean.

Margins of Error

The following table shows the maximum margin of error for the intercept and combined samples. The maximum margin is ±1.2 percent for the overall sample and ±1.6 percent for the intercept sample. The combined sample is used for most data in this report, with a couple of questions based to intercept respondents only. Sample sizes and margins of error for specific subgroups are presented in the introduction to each section and/or chapter where those subgroups are profiled.

TABLE VI.8 - Visitor Survey Margin of Error

Survey Method	Sample Size	Maximum Margin of Error
Intercept	3,563	±1.6%
Online	3,177	n/a
Total	**6,740**	**±1.2%**

Note: The data presented in this report is based to either intercept data or total data. Data based only to online respondents is not reported.

While the margin factors in the table above (and those offered throughout this report) give general guidelines for the margin of error, most data in this report are more accurate than the maximum margins suggest. The margin is based not only on the number of respondents in the base of each question, but also on the percentage itself. (For example, a total of 2,130 respondents were cruise visitors, and 18 percent were from the Southern US.) The expression "maximum margin of error" applies only if the attribute being sampled is distributed 50-50 among the population, such as gender. For gender, the maximum margin of error for the total sample is ±1.2 percent.

However, the potential for error decreases as soon as the survey result moves toward either end of the bell curve. If a survey response is around 80 percent for the total sample of 6,747, the maximum error decreases to ±1.0 percent. This margin would apply, for example, to the survey result for trip purpose – 77 percent of all visitors said they were traveling for vacation/pleasure. That same margin would apply to responses around 20 percent. At the 90 and 10 percent level, the maximum margin for the total sample decreases even further, to ±0.7 percent.

Data Processing

Data Weighting

Survey data is often "weighted" to properly reflect known characteristics of a population. The primary weighting in AVSP is by exit mode. For example, AVSP VI included 268 surveys of visitors who exited the state by ferry, or 4.0 percent of all surveys. However, this market represents only 0.6 percent of all visitors. In order for these visitors to be properly represented in the overall visitor market, their surveys are "weighted down." Similarly, visitors exiting by cruise ship represented 16.1 percent of all surveys, but 48.4 percent of all exiting visitors. Their data is "weighted up." All AVSP data was weighted by exit mode to reflect actual traffic volumes.

Online data was weighted by one additional factor: trip purpose, among air visitors. Online respondents departing by Domestic Air showed a higher likelihood to participate in the survey if they were traveling for vacation/pleasure, and a lower likelihood if they were traveling to visit friends and relatives. Because the intercept method ensured accurate distribution by trip purpose, online data was weighted to reflect trip purpose distribution in the intercept sample.

Combining Data Sets

As explained earlier in this chapter, the visitor survey included two different methodologies: online and intercept. The online survey targeted the same visitor population as the intercept survey – invitation cards were distributed to visitors on the same flights, ferry vessels, and cruise ships (cards were not distributed on the highway because it was more efficient to conduct the full interview with motorists). However, because the online survey received lower response rates (as expected), and because the survey was in a different format, several issues had to be addressed before combining the two data sets.

This first issue is bias. Self-selection bias occurs when the characteristics of respondents who choose to answer a survey differ from those of the overall target population. It is possible that the population that chose to respond to the survey differed from the population in the intercept survey. To address this issue, the study team compared a wide range of demographic variables between the two samples, including gender, origin, age, income, and education, as well as responses to questions. Responses were similar enough for all questions except for Trip Purpose (addressed above) to allow for combining the data sets.

The second issue is the difference in survey formats. Some questions work better with a trained surveyor who can clarify a question's meaning and correct mistakes. In the 2006 survey, a number of questions were based on the intercept sample only, because online respondents appeared to have misunderstood and not answered correctly. Due to improvements in clarity and more detailed directions in the 2011 online survey, nearly all of these questions allowed for usage of both intercept and online data, with one exception: expenditure data.

Questions on expenditures tend to be difficult for visitors to answer, whether intercept or online. Respondents have to rely on their memory, sometimes on purchases made days or weeks beforehand. The level of detail requested on this survey was particularly challenging: visitors were asked for their purchases in each community, in six different categories, in addition to overall spending in the state, spending on packages, and more. The differences in expenditure results between the intercept and online samples indicated that the online respondents had difficulty with the complexity of this part of the survey. As in 2006, the expenditure data is based to intercept responses only.