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

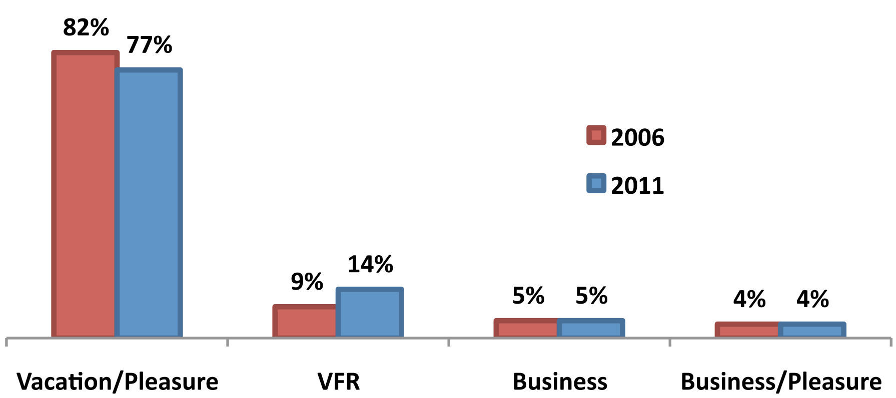


TABLE 4.2 - Trip Purpose, By Transportation Market, 2006 and 2011 (%)

	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

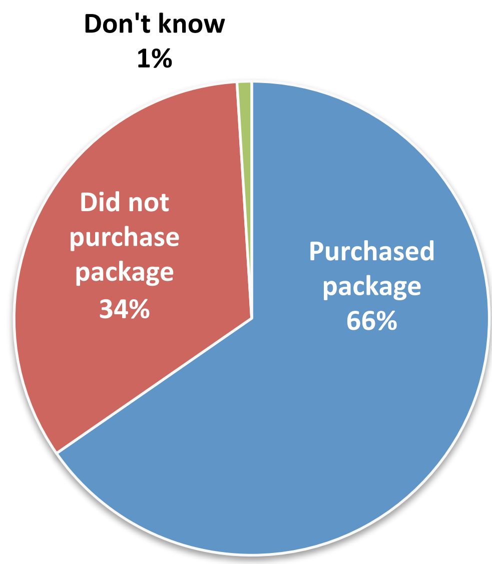


TABLE 4.3 - Purchase of Multi-Day Packages By Transportation Market, 2006 and 2011 (%)

	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.

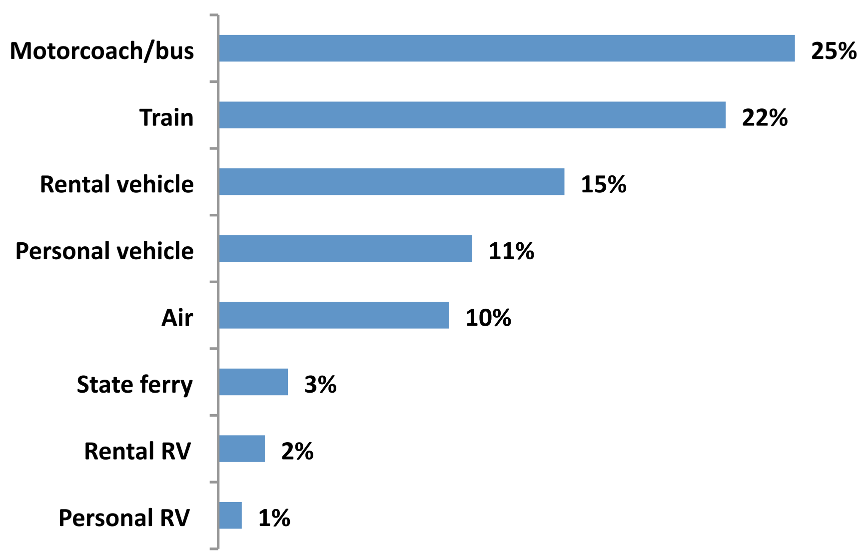
Entry/exit mode results tend to resemble those for 2006. The decline in the percentage of cruise passengers exiting by air, and corresponding increase in those exiting via cruise, reflects the increase in round trip itineraries since 2006.

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

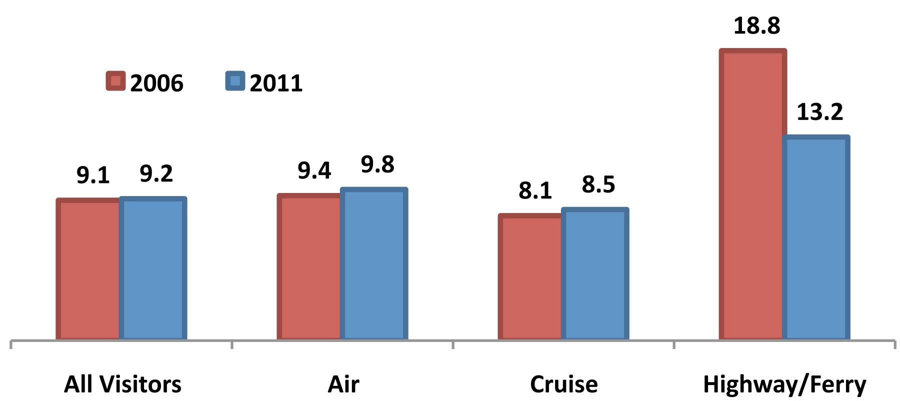


TABLE 4.12 - Length of Stay in Alaska
By Transportation Market, 2006 and 2011 (%)

	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

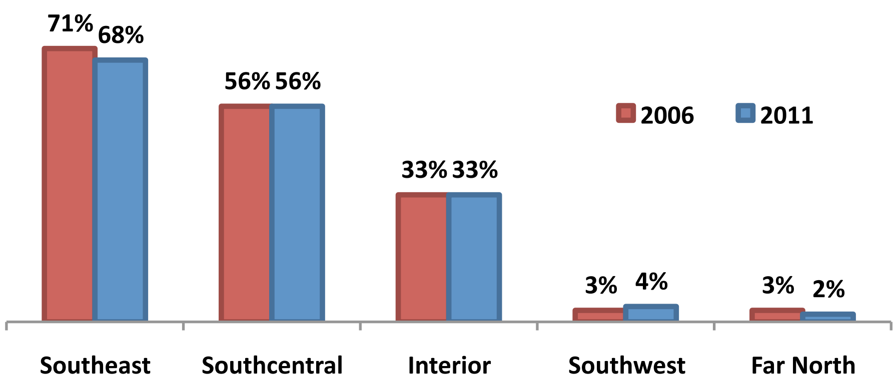
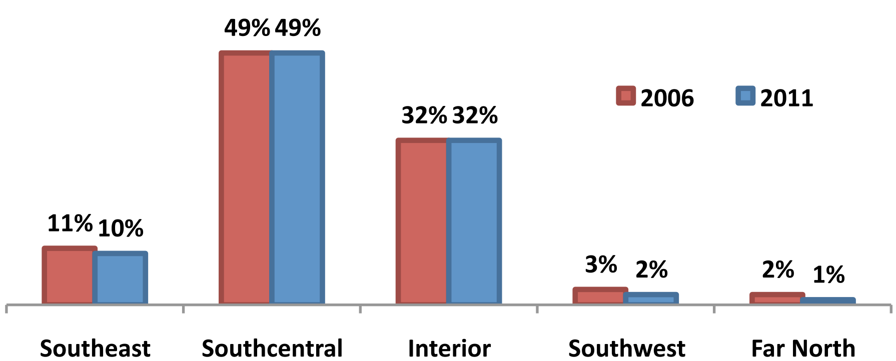


CHART 4.6 - Regions Visited Overnight, 2006 and 2011



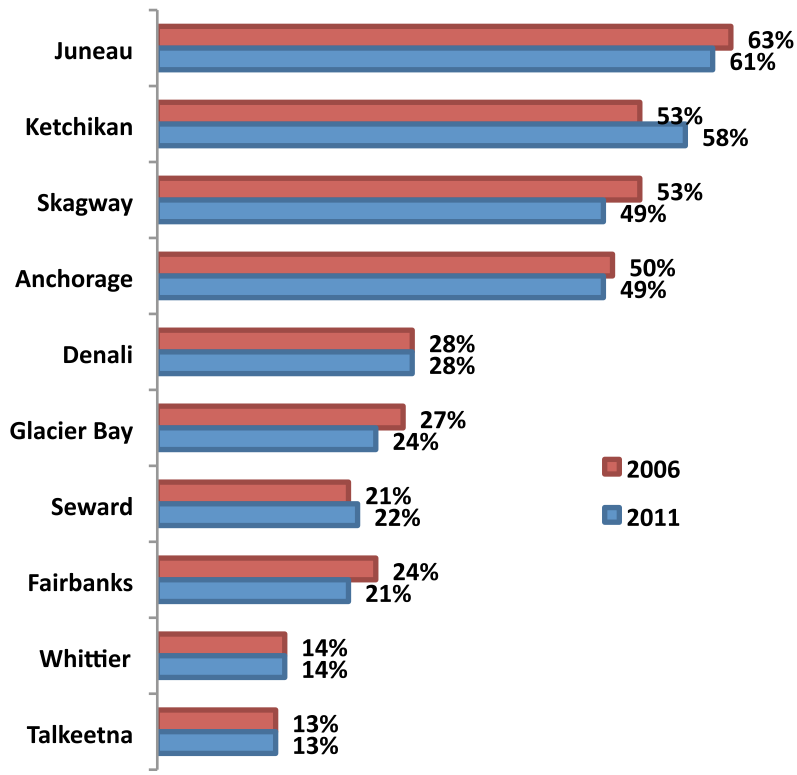
Regional visitation differed significantly by visitor market in 2011 (see tables on following pages). Visitation to Southeast ranged from 99 percent of the cruise market, to 63 percent of the highway/ferry market, to 20 percent of the air market. The air market was much more likely to visit Southcentral 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

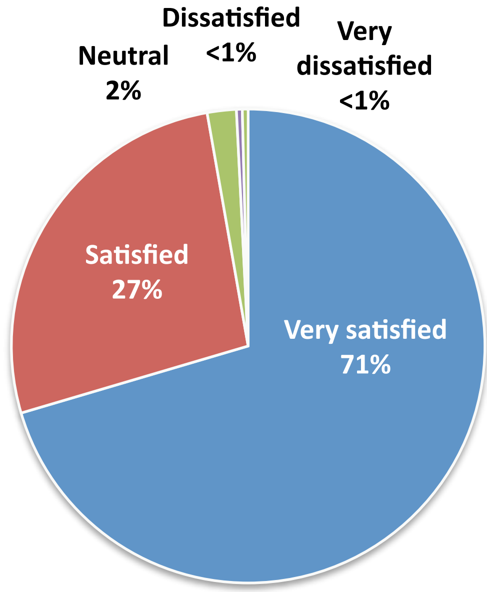


TABLE 4.20 - Satisfaction with Overall Alaska Experience By Transportation Market, 2006 and 2011 (%)

	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**

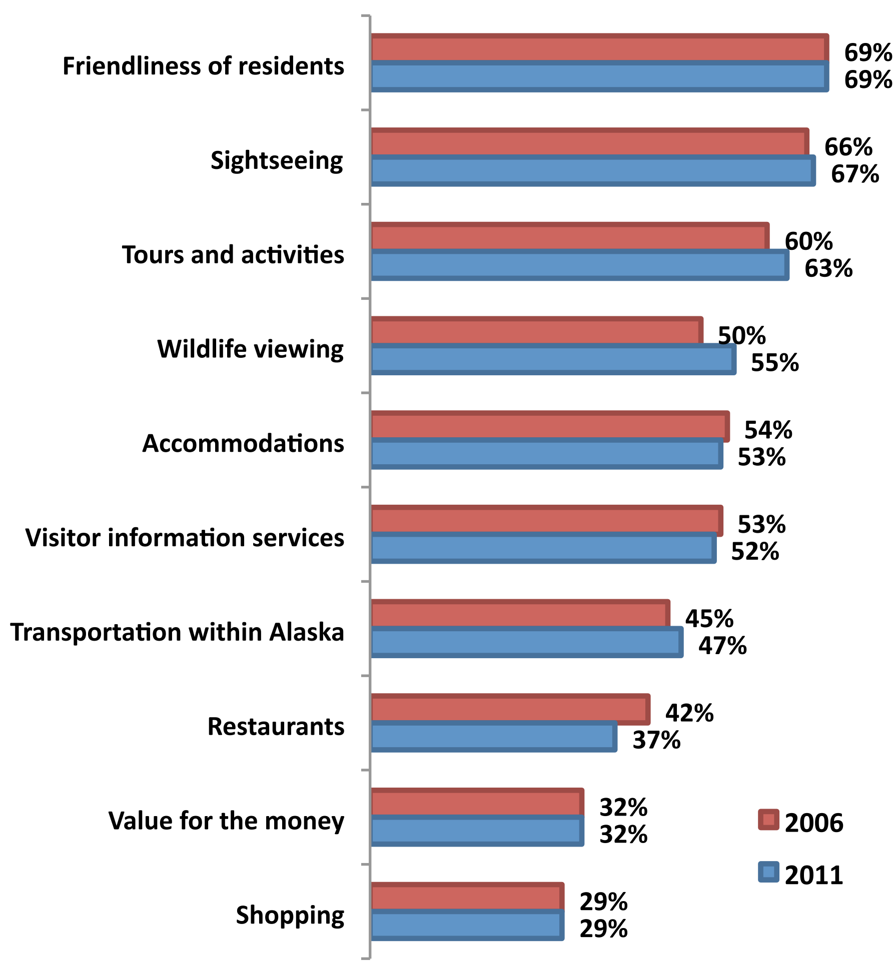
Satisfaction by Category

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

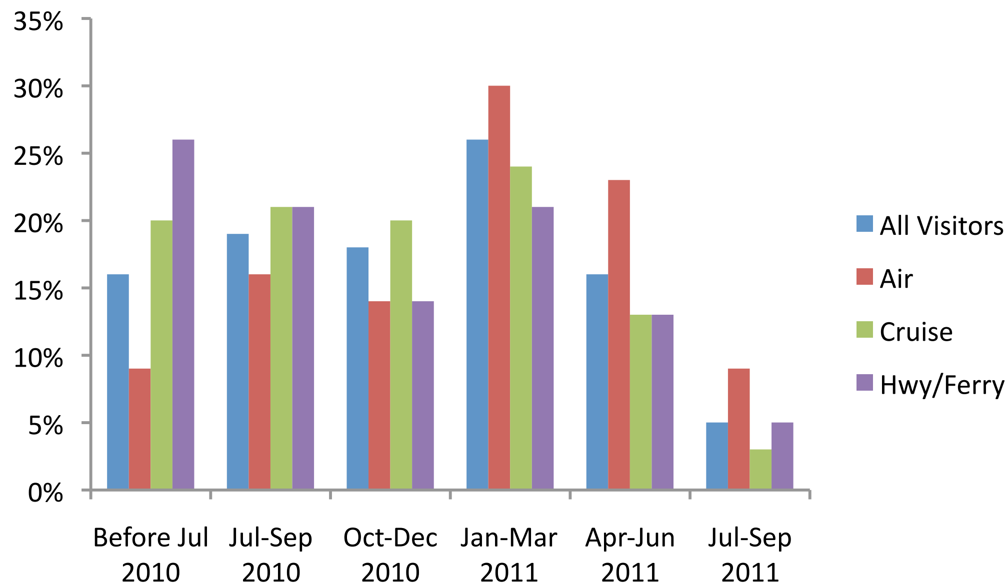
	Repeat Visitors		Repeat Air		Repeat Cruise		Repeat Hwy/Ferry	
	2006	2011	2006	2011	2006	2011	2006	2011
Air	72	71	91	91	51	48	28	33
Cruise ship	26	29	9	8	58	66	15	7
Highway	11	9	4	4	11	7	59	57
State ferry	3	3	2	3	3	3	6	10
Other	1	1	<1	1	2	1	<1	<1

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.

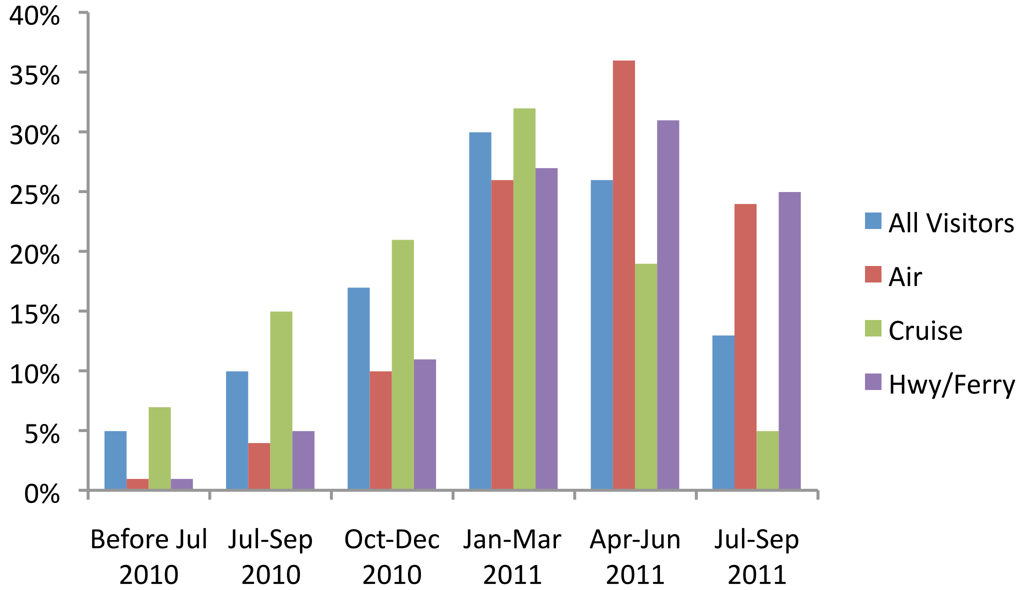
CHART 4.11 - Timeline of Alaska Trip Decision by Quarter
By Transportation Market, 2011



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

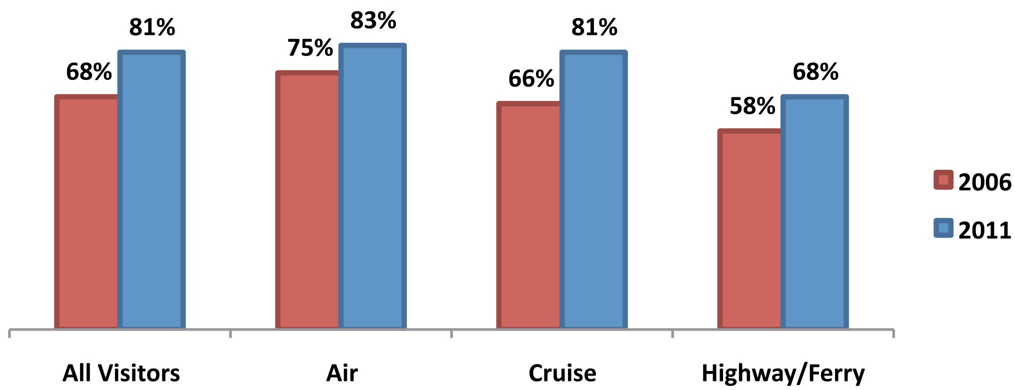


CHART 4.14 - Used Internet to Book Alaska Trip
By Transportation Market, 2006 and 2011

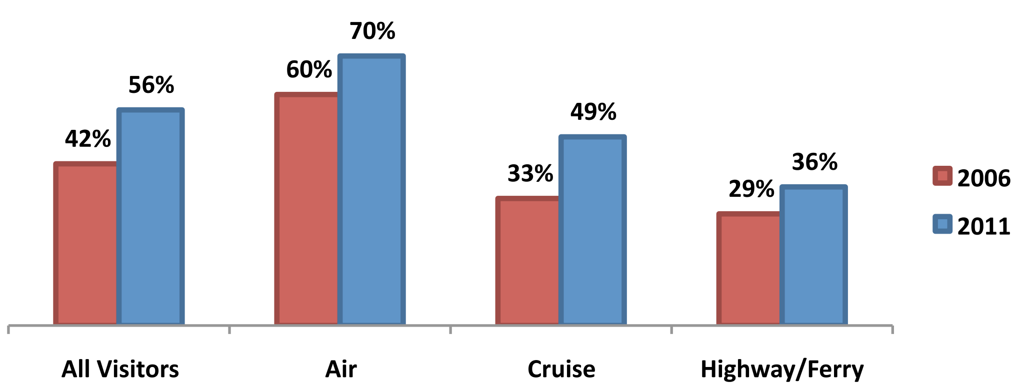


TABLE 4.29 - Internet Usage By Transportation Market, 2006 and 2011 (%)

	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.

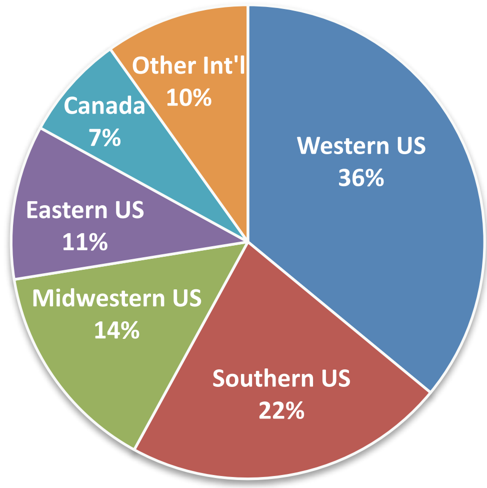
TABLE 4.34 - Other Information Sources
By Transportation Market, 2006 and 2011 (%)

	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

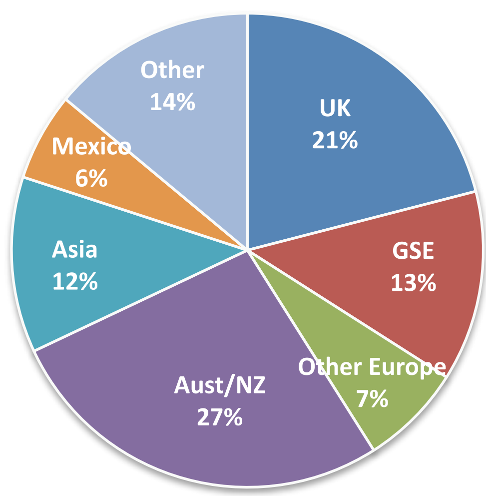


The US accounted for 83 percent of visitors in 2011, while Canada accounted for 7 percent and other international countries accounted for 10 percent. Within the US, the West was by far the most prominent region, representing 36 percent of all visitors – significantly more than the next largest market, 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

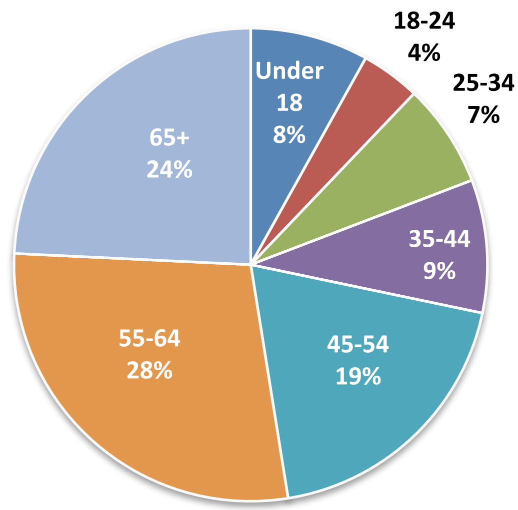


TABLE 4.38 - Age and Gender By Transportation Market, 2006 and 2011 (%)

	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

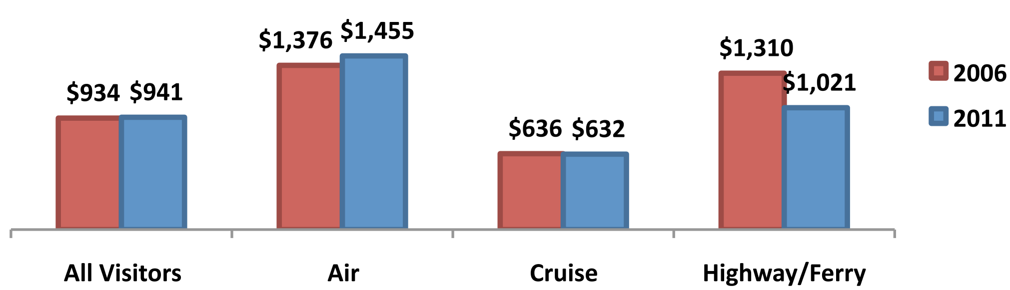


TABLE 4.43 - Visitor Expenditures in Alaska, Per Person, Overall Excluding Transportation to/from Alaska By Transportation Market, 2006 and 2011 (%)

	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.

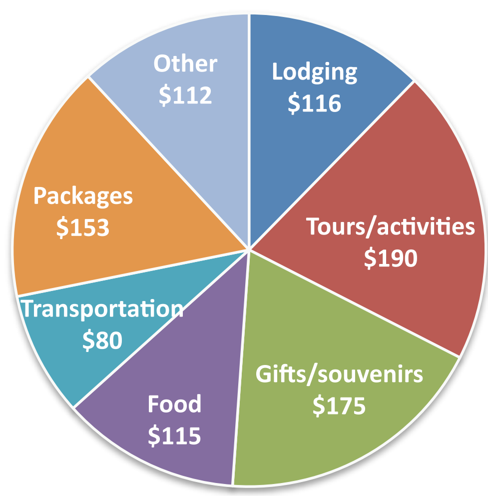
Expenditures By Category

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

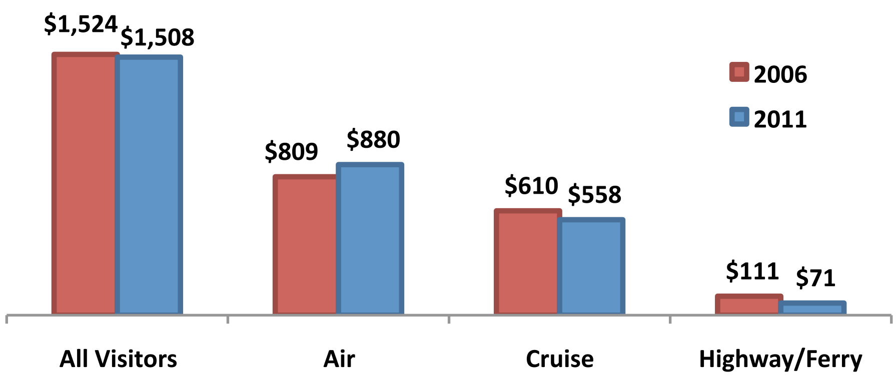
Notes: This data is based to intercept respondents only. Average cruise package price does not include airfare.

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

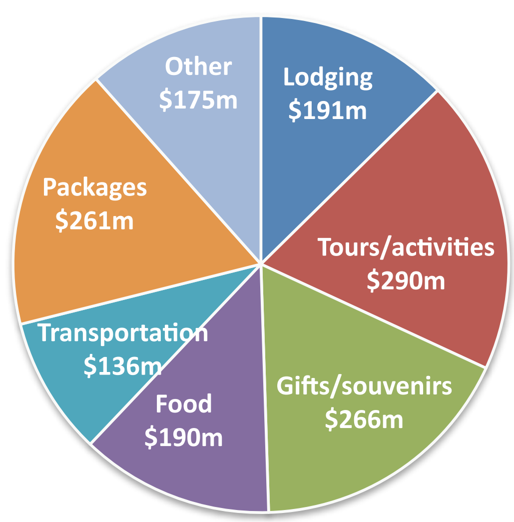


TABLE 4.46 - Total Visitor Expenditures in Alaska, by Category in Millions of Dollars By Transportation Market, 2006 and 2011

	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.