
AVSP VI - Summer 2011

**Section V:
Summary Profiles**

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.

**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		South- central		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 visitors. 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 2011, 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

