Presentation Contents

- Methodology Overview
- Visitor Volume
- Survey Results
McDowell Group

- 2,000+ research and consulting projects since 1972
- Offices in Juneau and Anchorage
- Conducted five out of six AVSPs since 1985

Visitor industry services:
- Visitor and customer surveys
- Community tourism planning
- CVB member surveys
- Economic impact analysis
- Feasibility and business planning
What is AVSP?

- Periodic year-long study of out-of-state visitors to Alaska
  - Six studies since 1985
  - Traffic updates in interim years
  - Summer: May-September, Fall/Winter: October-April
- Commissioned by DCCED, Office of Economic Development
- Two main components
  - Visitor traffic estimates
  - Visitor survey
Visitor Traffic

- Passengers tallied: resident versus visitor
  - Air and highway modes; not cruise or ferry
  - Tally locations:
    - Anc, Fai, Jun, Sit, Ktn airports
    - Four highway locations near borders
    - No tallies, just surveys at Ktn docks and ferry terminal
- Visitor/resident ratios determined by mode, location, month
- Ratios applied to traffic data
  - Air enplanements
  - Highway border crossings
Visitor Survey

- Visitors exiting the state
- Intercept and online methods used

Survey subjects:
- Trip purpose
- Package type
- Transportation modes
- Previous & future Alaska travel
- Length of stay
- Destinations
- Lodging
- Spending
- Activities
- Satisfaction
- Trip planning
- Demographics
New for 2011

- Larger overall sample
  - Surveyed: 5,659 to 6,747
  - Tallied: 49,703 to 54,605
- Expanded and improved questions
  - Group AND party size
  - Package purchase behavior
- Online survey in German, Japanese, Spanish
- Larger international air sample (from 573 to 891)
  - Total international visitors: from 703 to 1,220
- Nearly all online data integrated
New for 2011:
Report

- New section on visitor industry indicators
  - US Domestic and International traffic data
  - US economic conditions
  - Cruise industry indicators
  - Alaska indicators: highway traffic, ferry traffic, bed tax data, rental vehicle tax data, fishing license sales

- Visitor Profile includes 2006 and 2011 data
- Analysis of trip planning by month/year
- Separate international report
- Added profiles of campground users, group travelers
Transportation market: Cruise, Air, Highway/Ferry
Trip purpose: Vacation/pleasure, VFR, Business
Highway and Ferry Users
Origin: US Regions, Canada
International: UK, Australia/NZ, Japan, Korea, GSE (Germany, Switzerland), Other Europe
Alaska regions and communities
Sportfishing, Adventure travelers, B&B, Independent cruisers, Native Culture
NEW: Campground users, Group travelers
Visitor Volume
Alaska Visitor Volume
Summer 2011

- Total visitors: 1,556,800
- Up 1.6% from 2010
  - +24,000 visitors
- Compared to 2006:
  - Cruise 59% to 57%
  - Air 36% to 39%
  - Hwy/ferry 5% to 4%
Summers 2002-2011

- Summer 2011: First increase (1.6%) since 2007 peak
- +22% from 2002 volume
- -9% from 2007 peak; -5% from 2006 (AVSP V)
Alaska Visitor Volume, Summers 2006-2011, By Market
Survey Results
Trip Purpose

- **Vacation pleasure:**
  - 98% of cruise
  - 80% of highway/ferry
  - 43% of air

- **Shifts from 2006:**
  - Vacation/pleasure: -5%
  - VFR: +5%
  - Shifts more pronounced among air visitors
Who purchased multi-day package?

- 100% of cruise
- 18% of air
- 7% of highway/ferry
- 2011 rate of 66% down from 69% in 2006
Package Type
Base: Non-Cruise Package Visitors

- Fishing lodge package: 44%
- Wilderness lodge package: 16%
- Adventure tour: 13%
- Motorcoach tour: 10%
- Rail package: 9%
- Rental car/RV package: 6%
- Other: 2%

Compared to 2006...
- Fishing lodge: -2%
- Wilderness lodge: +3%
- Motorcoach: +5%
- Rental car/RV package: New in 2011
Compared to 2006...

- Round trip +7%
  - Cross-gulf -7%
    - Land tour +2%
    - Cruise one-way -9%
  - In-state -1%
- % who traveled independently: from 12% to 27%
Transportation Used to Travel Between Communities (excludes cruise ship)

- **Differences by market:**
  - Cruise: motorcoach, train
  - Air: rental vehicle, personal vehicle, air
  - Hwy/ferry: personal vehicle, RV, ferry

- **Since 2006...**
  - Train +3%
  - Personal vehicle +2%
  - Air -2%
Southeast overall visitation down 71% in 2006 to 68% in 2011

All other visitation rates by region stayed the same or were up/down 1%
### Top 15 Alaska Destinations

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juneau</td>
<td>61%</td>
</tr>
<tr>
<td>Ketchikan</td>
<td>58%</td>
</tr>
<tr>
<td>Anchorage</td>
<td>49%</td>
</tr>
<tr>
<td>Skagway</td>
<td>49%</td>
</tr>
<tr>
<td>Denali</td>
<td>28%</td>
</tr>
<tr>
<td>Glacier Bay</td>
<td>24%</td>
</tr>
<tr>
<td>Seward</td>
<td>22%</td>
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<tr>
<td>Fairbanks</td>
<td>21%</td>
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<tr>
<td>Whittier</td>
<td>14%</td>
</tr>
<tr>
<td>Talkeetna</td>
<td>13%</td>
</tr>
<tr>
<td>Palmer/Wasilla</td>
<td>11%</td>
</tr>
<tr>
<td>Sitka</td>
<td>10%</td>
</tr>
<tr>
<td>Kenai/Soldotna</td>
<td>10%</td>
</tr>
<tr>
<td>Homer</td>
<td>9%</td>
</tr>
<tr>
<td>Girdwood/Alyeska</td>
<td>9%</td>
</tr>
</tbody>
</table>
Satisfaction with Overall Alaska Experience

- Since 2006...
  - Very satisfied +1%
  - Dissatisfied -1%
- Compared to expectations
  - 63% higher
  - 2% lower
- Value for money vs. elsewhere
  - 37% better
  - 50% same
  - 14% worse
Percent Very Satisfied, By Category, 2006 and 2011

- Friendliness of residents: 69% (2006), 69% (2011)
- Sightseeing: 66% (2006), 67% (2011)
- Tours and activities: 60% (2006), 63% (2011)
- Wildlife viewing: 50% (2006), 55% (2011)
- Accommodations: 54% (2006), 53% (2011)
- Visitor information services: 53% (2006), 52% (2011)
- Transportation within Alaska: 45% (2006), 47% (2011)
- Restaurants: 37% (2006), 42% (2011)
- Value for the money: 32% (2006), 32% (2011)
- Shopping: 29% (2006), 29% (2011)
Timing of Alaska Trip Decision and Trip Booking

- Average advance time for Alaska trip decision: from 8.1 months in 2006 to 8.6 months in 2011
- Average advance time for Alaska trip booking: 5.4 months in both years
Used Internet to Plan Alaska Trip
By Transportation Market
2006 and 2011

- All Visitors
  - 2006: 68%
  - 2011: 81%

- Air
  - 2006: 75%
  - 2011: 83%

- Cruise
  - 2006: 66%
  - 2011: 81%

- Highway/Ferry
  - 2006: 58%
  - 2011: 68%
Used Internet to Book Alaska Trip
By Transportation Market
2006 and 2011

- 47% booked through travel agent (down from 52% in 2006)
Top Additional Information Sources Besides Internet/Travel Agent

- 26% visited travelalaska.com
  - 23% in 2006
- 17% received Official Vacation Planner
  - 15% in 2006
- Other changes...
  - +5% friends/family
  - -5% television

- Friends/family: 50%
- Cruise line: 37%
- Prior experience: 24%
- Brochures: 23%
- AAA: 16%
- Travel guide/book: 12%
- Tour company: 7%
- Television: 6%
- Magazine: 5%
- Hotel/lodge: 5%
- Milepost: 5%
- CVBs: 5%
<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>69%</td>
</tr>
<tr>
<td>Wildlife viewing</td>
<td>52%</td>
</tr>
<tr>
<td>Cultural activities</td>
<td>49%</td>
</tr>
<tr>
<td>City/sightseeing tours</td>
<td>39%</td>
</tr>
<tr>
<td>Train</td>
<td>38%</td>
</tr>
<tr>
<td>Hiking/nature walk</td>
<td>38%</td>
</tr>
<tr>
<td>Day cruises</td>
<td>36%</td>
</tr>
<tr>
<td>Fishing</td>
<td>20%</td>
</tr>
<tr>
<td>Visiting friends/relatives</td>
<td>19%</td>
</tr>
<tr>
<td>Flightseeing</td>
<td>16%</td>
</tr>
<tr>
<td>Shows/Alaska entertainment</td>
<td>13%</td>
</tr>
<tr>
<td>Tramway/gondola</td>
<td>12%</td>
</tr>
<tr>
<td>Salmon bake</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Cultural activities include**
- Museums: 27%
- Historical/cultural attractions: 25%
- Native cultural tours/activities: 17%
- Gold panning/mine tour: 15%

**Changes since 2006**
- Hist/cult. attractions +7%
- Wildlife viewing -4%
- Hiking/nature walk +8%
- City/sightseeing tours -5%
Alaska Visitor Origin

- **Top states**
  - California: 12%
  - Washington: 9%
  - Texas: 6%
  - Florida: 4%

- **Changes since 2006**:
  - US: -2%
  - Canada: +1%
  - Other Int’l: +1%
  - Western US -3%
  - Southern US +3%
- International visitor volume up <1%
  - From 153,400 to 154,100
- Changes in market share
  - UK -16%
  - Aust/NZ +7%
  - GSE +3%
  - Other +7%
Demographics

- Average age: 50.7 years
  - 51.6 years in 2006
  - <18 yrs up by 2%
- 50/50 gender ratio
  - Same as 2006
- Average party size: 2.5 people
  - 2.4 in 2006
- Average group size: 5.1 people
- Average income $107K
  - -9% in real $ from 2006
Average Per-Person, Per-Trip Spending on Alaska Trip By Transportation Market 2006 and 2011

- Excludes spending on transportation to enter/exit Alaska and cruise packages
- Inflation-adjusted: spending down 11%
Total Visitor Expenditures in Alaska in Millions of Dollars
By Transportation Market, 2006 and 2011

- Inflation-adjusted: total spending down 13%
Questions