May 2017

Alaska Visitor Statistics Program 7

Summer 2016

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

Alaska Travel Industry Association

PREPARED BY
McDowell Group

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www.mcdowellgroup.net

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AVSP 7 – Summer 2016

Section 1: Executive Summary

McDowell GROUP

Introduction

AVSP Overview

The Alaska Visitor Statistics Program (AVSP) is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community, and Economic Development (DCCED). The study provides essential information on one of Alaska's major economic engines: out-of-state visitors. AVSP 7 (the seventh generation of the program) consists of two main components:

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

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

AVSP 7 addresses the 2016 summer period of May through September.

Project Team

The AVSP 7 project team was led by McDowell Group, a research and consulting firm with offices in Juneau and Anchorage. McDowell Group was assisted by Fusion MR of Portland, Oregon, and MR Data of Seaview, Washington.

Methodology

The visitor volume estimate was based on visitor/resident tallies of 57,441 travelers exiting Alaska at major exit points. The resulting ratios were applied, by month and by location, to traffic data (highway border crossings and airport enplanements) to arrive at visitor volume estimates. (Tallies of cruise passengers were not conducted because all passengers were treated as visitors. Visitor/resident ratios for Alaska Marine Highway System were based on 2015 passenger residency data, applied to 2016 passenger traffic, as residency was not captured in 2016.)

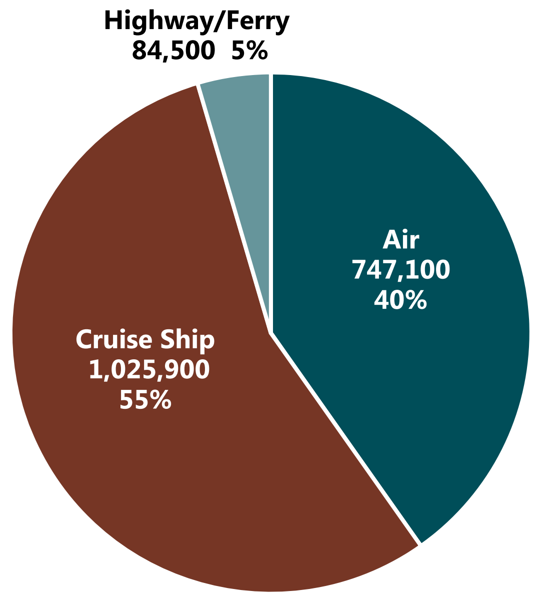
The visitor survey included 5,147 intercept surveys (in-person interviews) and 779 surveys completed online, for a total of 5,926 surveys. Visitors were surveyed at all major exit points: airports, highways, cruise ship docks, and ferries. To obtain the online sample, "invitation cards" were distributed to visitors during intercept sample periods, inviting them to participate in the web-based survey. The response rate for the intercept survey was 80 percent; for the online survey, 8 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

Please see *Section 20: Methodology* for further details.

- An estimated 1,857,500 out-of-state visitors came to Alaska between May and September 2016 – the highest visitor volume on record.
- In terms of transportation market, 55 percent of visitors were cruise ship passengers, 40 percent were air visitors (entered and exited the state by air), and 5 percent were highway/ferry visitors (entered or exited the state by highway or ferry).
- Summer 2016 visitor volume represented an increase of 4 percent (77,500 visitors) from summer 2015. The bulk of the increase is attributable to the air market, which increased by 6 percent (43,700 visitors). The cruise market increased by 3 percent (26,300 visitors), while the highway/ferry market increased by 10 percent (7,500 visitors).
- The 2016 volume is 8 percent higher than the volume of a decade earlier in 2007, and 21 percent higher than the low point of 2010. The 2016 volume is 19 percent higher than when the last AVSP was conducted, in 2011.

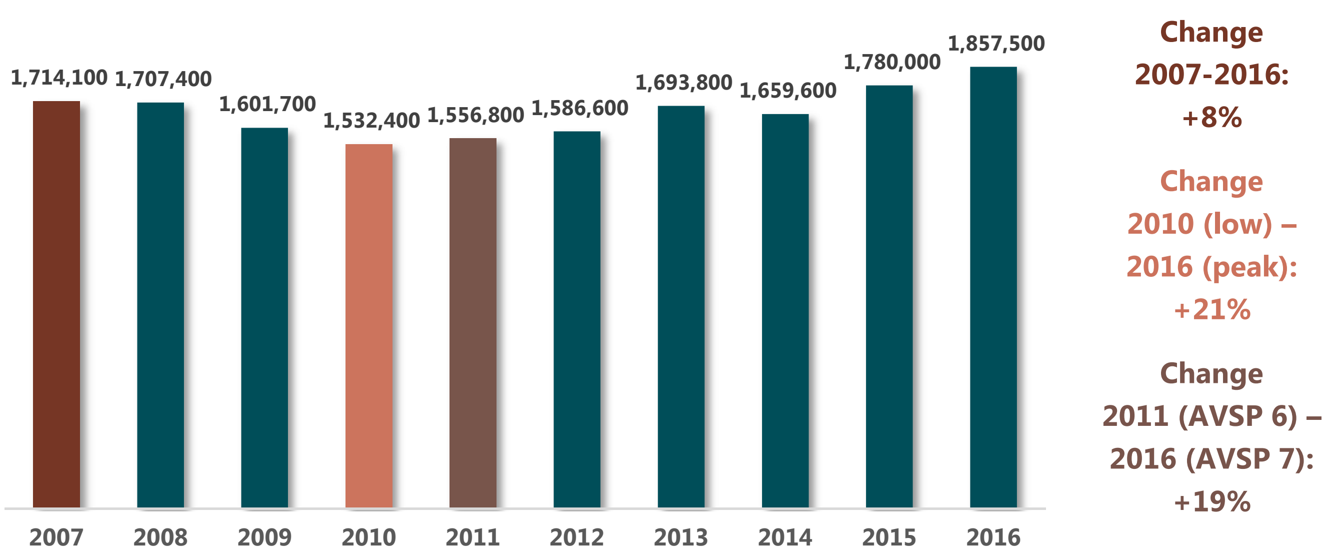
CHART 1.1 - Alaska Visitor Volume by Transportation Market, Summer 2016

Total Visitor Volume: 1,857,500



- Additional information on Alaska's visitor volume, including trends by transportation market, industry indicators, and volume for Alaska regions and communities, can be found in *Section 3*.

CHART 1.2 - Alaska Visitor Volume, Summers 2007-2016

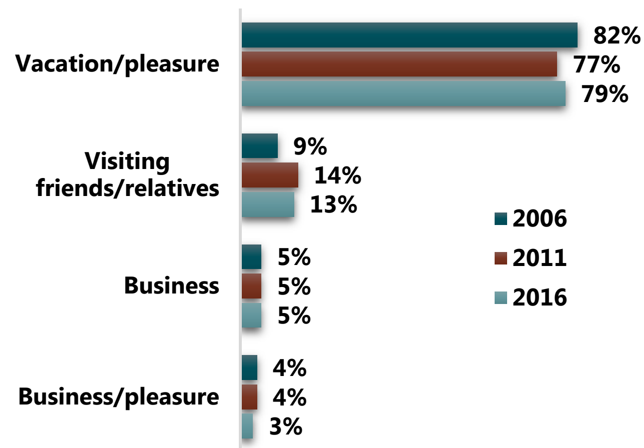


Source: AVSP 6 and 7.

Trip Purpose and Packages

Trip Purpose

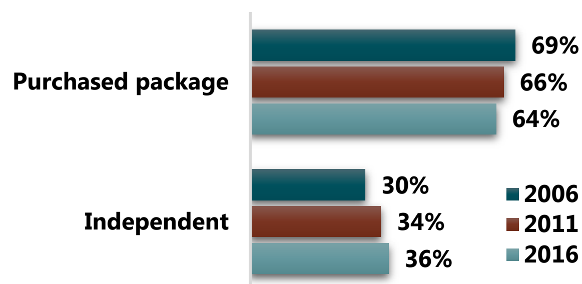
CHART 1.3 - Alaska Visitor Volume by Transportation Market, Summers 2006, 2011, 2016



- In terms of the purpose of their Alaska trip, visitors are most likely to be traveling for vacation/pleasure, at 79 percent, followed by visiting friends/relatives (13 percent), business (5 percent), and business/pleasure (3 percent).
- Trip purpose rates vary widely by transportation market: cruise visitors are the most likely to be traveling for vacation/pleasure at 99 percent. This compares with 77 percent of the highway/ferry market and 49 percent of the air market.
- Air visitors are the most likely to be traveling to visit friends/relatives (31 percent), and to be traveling for business only (13 percent) or business/pleasure (8 percent).
- The vacation/pleasure rate has fluctuated over the last decade: from 82 percent in 2006, to 77 percent in 2011, to 79 percent in 2016. The VFR rate has changed accordingly, while the business and business/pleasure rates have stayed more consistent.

Package versus Independent

CHART 1.4 – Package versus Independent Travelers, Summers 2006, 2011, 2016



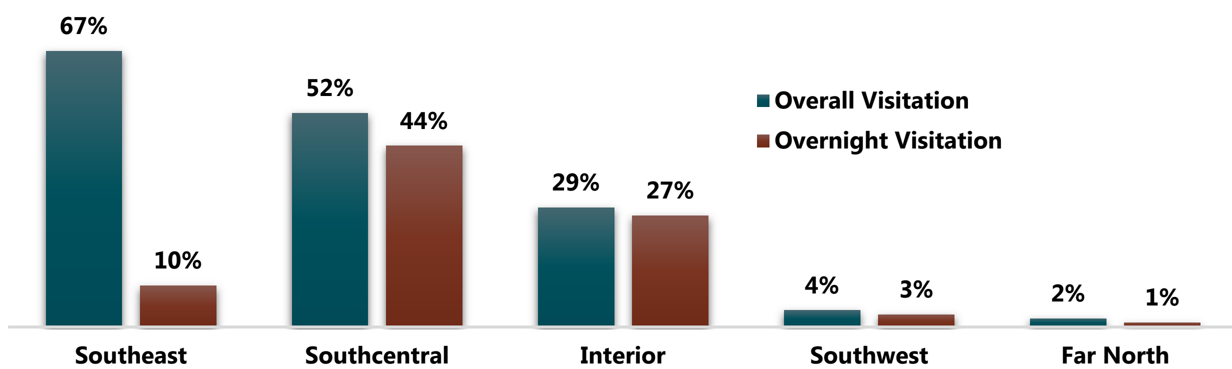
- Nearly two-thirds of Alaska visitors (64 percent) purchased a multi-day package in summer 2016, while 36 percent were independent travelers.
- The package purchase rate has fallen gradually over the last decade, from 69 percent in 2006, to 66 percent in 2011, to 64 percent in 2016. The independent rate has risen accordingly.
- The major factor in the package rate is the cruise market, which declined by 2 percent in each of the last AVSPs: from 59 percent in 2006, to 57 percent in 2011, to 55 percent in 2016.
- Among air package visitors (virtually no highway/ferry visitors reported package purchase), the most common package types were fishing lodge, rail, wilderness lodge, and adventure tour.

TABLE 1.1 – Package Type, Air Package Visitors, Summer 2016

	%
Fishing lodge package	50
Rail package	11
Wilderness lodge package	10
Adventure tour package	9
Motorcoach tour	8
Rental car/RV package	6
Hunting package	2

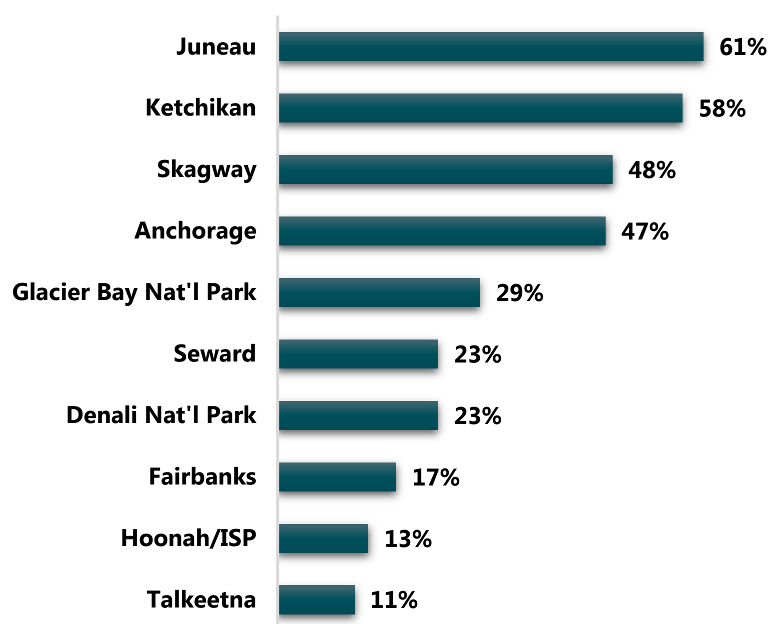
- Southeast is the most visited region in Alaska, capturing 67 percent of the overall market, followed by Southcentral (52 percent), Interior (29 percent), Southwest (4 percent), and Far North (2 percent).
- Overnight visitation rates are very different for Southeast, which captured 10 percent of the market in 2016. (Cruise passengers are not considered overnight visitors unless they overnight in communities.) Southcentral was the most visited region for overnight visits at 44 percent, followed by Interior at 27 percent.
- Regional visitation rates for the overall market have changed very little over the last decade. Between 2011 and 2016, slight declines occurred in Southcentral (from 56 to 52 percent), Interior (from 33 to 29 percent), and Southeast (from 68 to 67 percent). Southwest and Far North stayed the same at 4 percent and 2 percent, respectively.

CHART 1.5 – Regions Visited in Alaska, Overall and Overnight, Summer 2016



- The three cruise ports of Juneau, Ketchikan, and Skagway were the most visited destinations in Alaska in summer 2016.
- Changes in visitation rates by location between 2011 and 2016 were within 3 percent, with a few exceptions: Denali visitation fell from 28 to 23 percent, and Fairbanks visitation fell from 21 to 17 percent. These and other changes are discussed in more detail in *Section 5.*

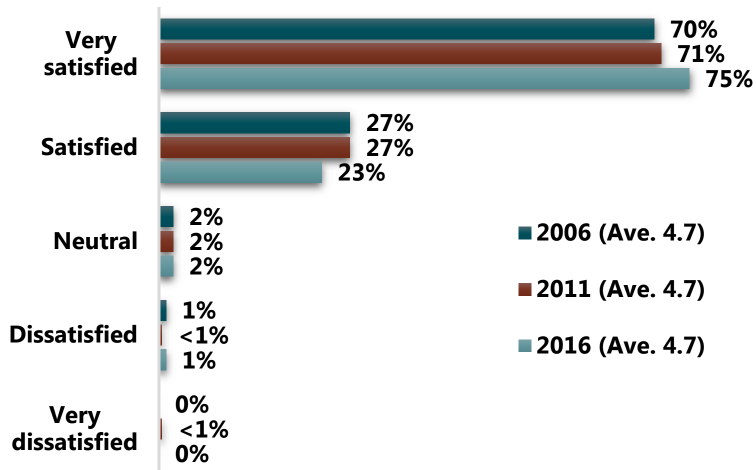
CHART 1.6 – Top 10 Alaska Destinations, Summer 2016



Satisfaction

- Alaska visitors rate their trip very highly, with 75 percent very satisfied and 23 percent satisfied. Just 1 percent were dissatisfied in 2016.
- Cruise passengers give slightly higher satisfaction rates at 76 percent very satisfied, followed by 73 percent among air visitors and 67 percent among highway/ferry visitors.
- Satisfaction rates increased over the last decade, with those very satisfied growing from 70 percent in 2006, to 71 percent in 2011, to 75 percent in 2016.

CHART 1.7 – Satisfaction with Overall Alaska Trip, 2006, 2011, 2016



- Another indicator supported an overall increase in satisfaction over the last decade. Those rating their Alaska trip as "much higher than expectations" increased from 25 percent in 2006, to 26 percent in 2011, to 29 percent in 2016.

Repeat Travel

- The rate of repeat travel to Alaska has been increasing over the last decade, from 30 percent of visitors in 2006, to 34 percent in 2011, to 40 percent in 2016.
- The percent of visitors indicating they were very likely to return to Alaska fluctuated slightly, from 40 percent in 2006, to 38 percent in 2011, to 40 percent in 2016.
- A new question in 2016 asked visitors who were very likely to return to Alaska, "What are you *most* interested in experiencing on your next Alaska trip?" Top responses were fishing, wildlife, visiting friends/family, the Northern Lights, and Denali. A detailed list is available in *Section 6.*

CHART 1.8 – Repeat Alaska Travel, 2006, 2011, 2016

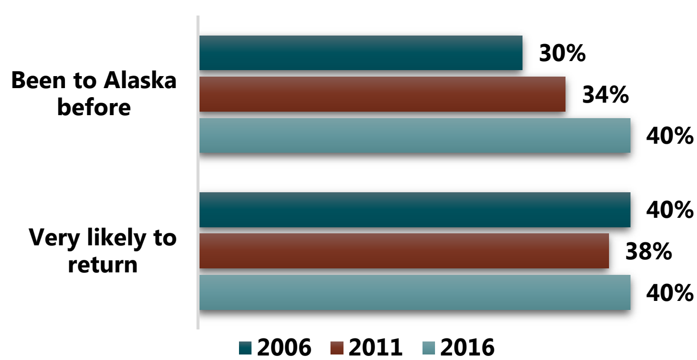


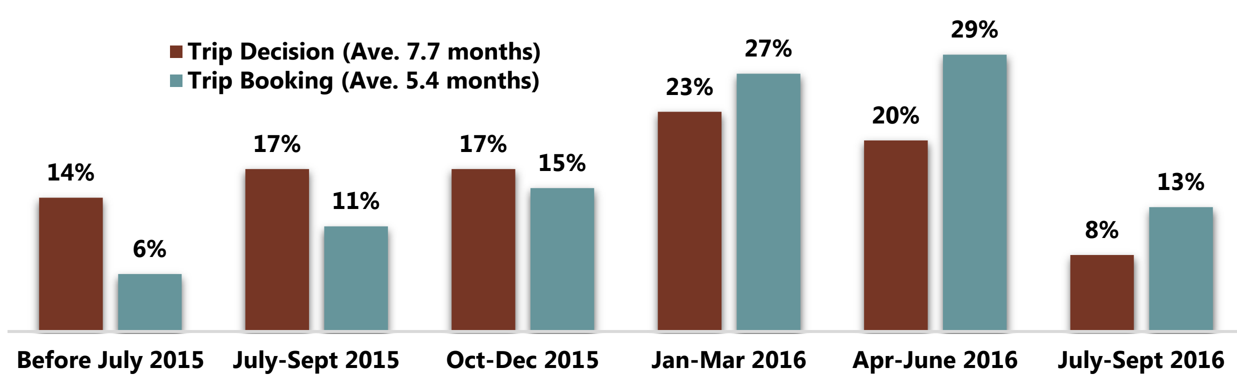
TABLE 1.2 – Top Five Anticipated Experiences on Future Trip Base: Very Likely to Return

	%
Fishing	22
Wildlife	10
Visit friends/family	9
Northern Lights	8
Denali	8

Timing of Trip Decision and Booking

- Visitors were asked two questions about the timing of their Alaska trip planning: when had they decided to come to Alaska, and when did they book their major travel arrangements. The average advance time for the trip decision was 7.7 months – down from 8.6 months in 2011. The average advance time for trip booking was 5.4 months, matching the average in 2011.
- The most common time frame for making the trip decision was January-March 2016, representing 23 percent of visitors. Other time frames had nearly equal representation.
- The most common time frame for trip booking was April-June 2016 (29 percent), followed by January-March (27 percent).

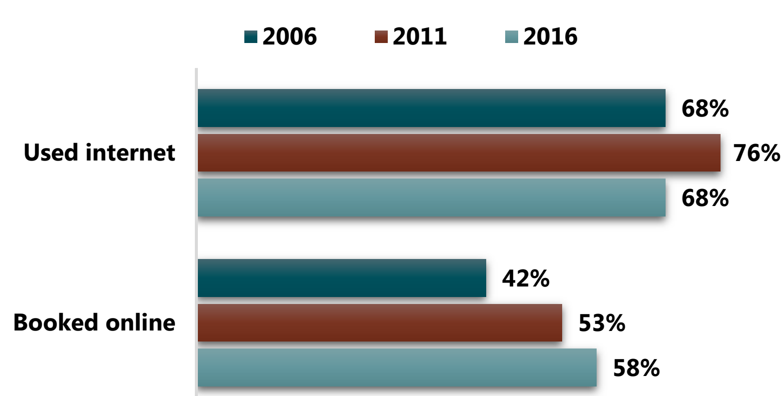
CHART 1.9 – Time Periods for Alaska Trip Decision and Trip Booking, 2016



Online Usage and Booking

- Alaska visitors rely heavily on the internet (including apps) to plan their Alaska trip, with 68 percent saying they planned or booked book at least some portion of their Alaska trip online. This includes 58 percent who said they booked online.
- The rate of online usage appears to have declined since 2011. It is possible that a slight change in question wording impacted results. The phrase "including any apps" was added to the question, and "research" was changed to "plan."
- Online booking rates increased over the last decade, from 42 percent in 2006, to 53 percent in 2011, to 58 percent in 2016.

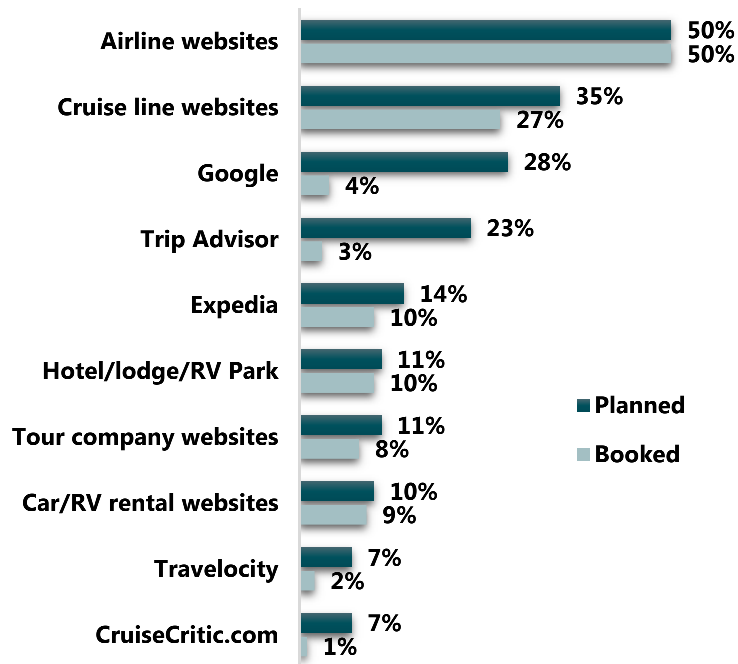
CHART 1.10 – Online/App Usage and Booking, 2006, 2011, 2016



Most Popular Websites/Apps

- A new question in 2016 asked online users which websites/apps they used to plan and book their Alaska trip. Respondents were shown a list of 29 specific websites/apps and website categories (such as "airline websites").
- The most commonly used sites for both planning and booking were airline and cruise line websites. Other popular sites included Google, TripAdvisor, Expedia, lodging websites, tour company websites, and car/RV rental websites.
- In a separate question, over one-third of respondents (35 percent) said they had used a travel agent to book their trip. Travel agent usage rates have declined from 52 percent in 2006, to 47 percent in 2011, to 35 percent in 2016.

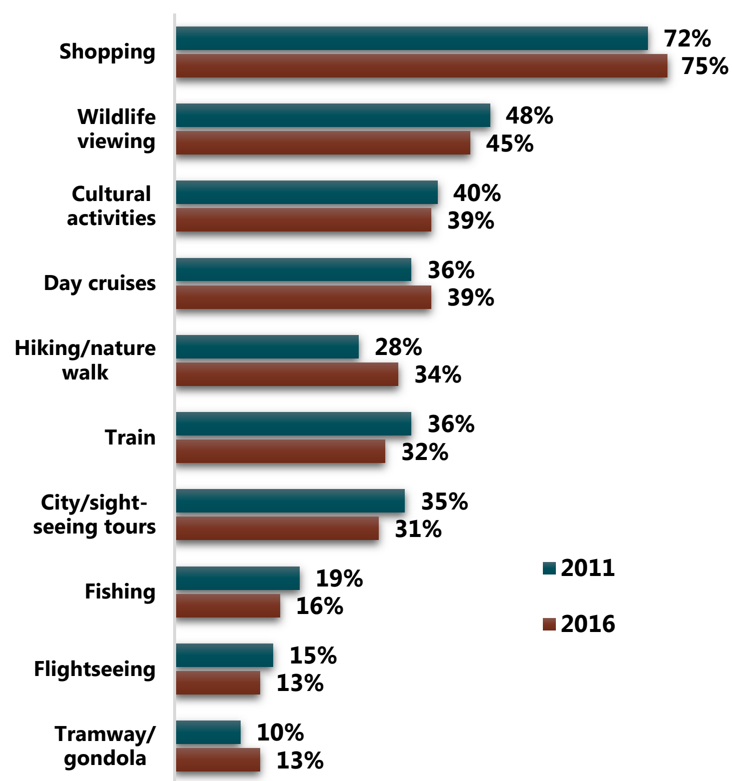
CHART 1.11 – Top Ten Websites/Apps for Planning/Booking
Base: Online Users



Activities

- When asked about their activities, Alaska visitors most commonly cited shopping, wildlife viewing, day cruises, and hiking/nature walk.
- Activity rates in 2016 were similar to 2011, with a few shifts of 3 or more percentage points. Participation rates increased for shopping, day cruises, hiking/nature walk, and tramway/gondola. Participation rates decreased for wildlife viewing, train, city/sightseeing tours, and fishing.
- Aside from shopping, the most common activities among cruise passengers were train, day cruises, and city/sightseeing tours. Air visitors were most likely to participate in wildlife viewing, hiking/nature walk, and fishing. Highway/ferry visitors showed high participation rates for wildlife viewing, hiking/nature walk, and camping.

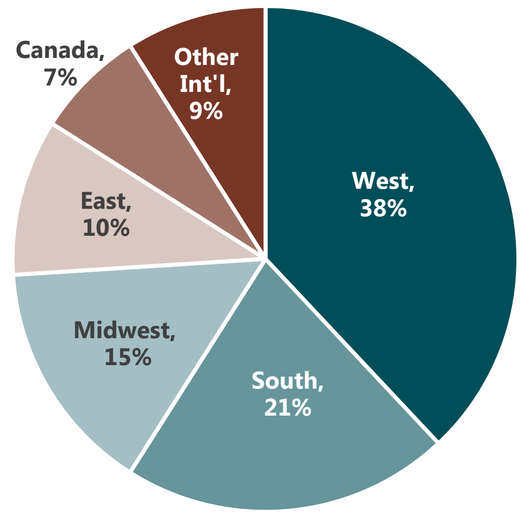
CHART 1.12 – Top Ten Activities, 2011 and 2016



Demographics

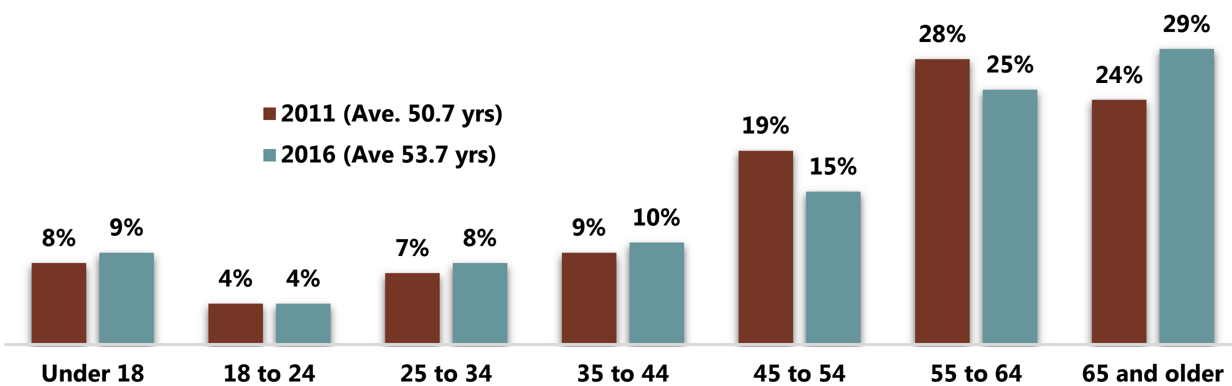
- The most common U.S. region of origin among Alaska visitors in summer 2016 was the West at 38 percent, followed by the South (21 percent), Midwest (15 percent), and East (10 percent). Canada accounted for 7 percent of visitors, and other international countries accounted for 9 percent.
- Visitor origin has changed very little over the last decade, with changes of only 1 to 2 percent since 2011.
- Alaska visitors most commonly travel in two-person parties (56 percent). One out of five visitors (19 percent) traveled by themselves. Average party size has stayed consistent at 2.4 people over the last decade.

CHART 1.13 – Visitor Origin



- The male/female split of Alaska visitors has been remarkably even over the last decade: 50/50 in 2006 and 2011, and 49/51 in 2016. A new question in 2016 asked for the gender of the party member who did most of the planning for the trip. Women were more likely to be the planners at 53 versus 38 percent (the remaining 9 percent of respondents had someone outside of their party do the planning).
- Alaska visitors' average age was 53.7 years, up from 50.7 in 2011. The most common age groups were 65+ (29 percent), followed by 55-64 (25 percent). Related to age, an increasing percentage of visitors report being retired or semi-retired: from 39 percent in 2006, to 41 percent in 2011, to 44 percent in 2016.

CHART 1.14 - Visitor Age, 2011 and 2016



- Nearly two-thirds of Alaska visitors (63 percent) reported having a college degree, slightly up from 59 percent in 2006 and 60 percent in 2011.
- Alaska visitors report an average household income of $114,000, up from $103,000 in 2006 and $107,000 in 2011.

- Alaska visitors spent an average of $1,057 per person on their Alaska trip, not including transportation to enter or exit the state, or any cruise or cruise/tour packages. This spending figure is 12 percent above the 2011 average of $941, and 13 percent above the 2006 average of $934.
- After adjusting for inflation, 2016 per-trip spending increased by 4 percent from 2011.
- Air visitors reported the highest average per-person spending at $1,674, followed by highway/ferry visitors at $990, and cruise visitors at $624. Cruise visitors reported spending an additional $2,437, on average, on their cruise or cruise/tour package.
- In terms of spending category, the categories with the highest average spending per person were tours/ activities/entertainment ($200), overnight packages not including cruises ($182), and gifts/souvenirs/clothing ($137). Additional categories included food/beverage ($133), lodging ($126), and transportation/fuel/rental cars ($81). The "other" category represents spending not attributable to any single spending category ($198).
- Spending by category differed significantly by transportation market. Air visitors' top spending categories were package and lodging; cruise visitors' top spending categories were tours and gifts; and highway/ferry visitors' top spending categories were food/beverage and lodging.
- Visitor spending on their Alaska trip, excluding transportation costs to travel to and from Alaska, totaled $1.97 billion in summer 2016, up 31 percent from the 2011 total of $1.51 billion. The large increase reflects the strong growth in visitor traffic as well as the increase in per-person spending.
- Adjusting 2011 dollars to 2016 value, total spending increased by 21 percent.

CHART 1.15 – Average Visitor Spending in Alaska, Per Person, Excluding Transportation to/from Alaska, 2006, 2011, 2016

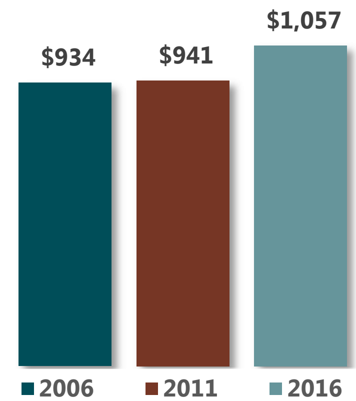


CHART 1.16 – Average Visitor Spending, Per Person, By Category, 2016

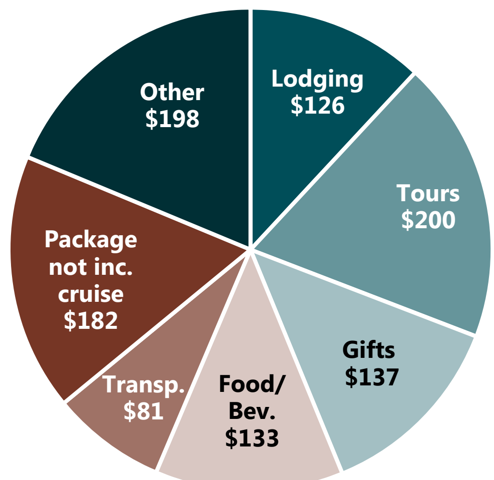
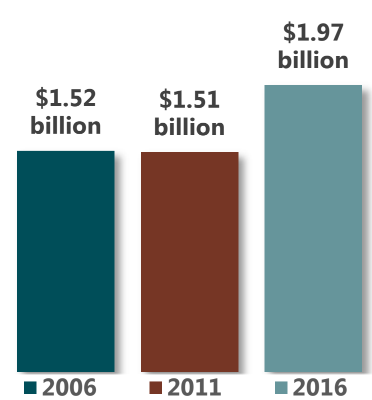


CHART 1.15 – Total Visitor Spending in Alaska, Excluding Transportation to/from Alaska, 2006, 2011, 2016



AVSP 7 – Summer 2016

Section 2: Introduction

AVSP Overview

The Alaska Visitor Statistics Program (AVSP) is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community, and Economic Development (DCCED). The study provides essential information on one of Alaska's major economic engines: out-of-state visitors. Previous AVSP studies were undertaken in 1985/86, 1989/90, 1993/94, 2000/01, 2006/07, and 2011/12. All but the 2000/01 study were conducted by McDowell Group. The project consists of two main components: an estimate of visitor volume, and a survey of visitors.

Visitor Volume

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

Visitor Survey

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

The study is typically undertaken in two stages: Summer (May 1-September 30) and Fall/Winter (October 1-April 30). This report addresses the summer period; the corresponding fall/winter study was not funded for this generation of AVSP.

Project Team

The AVSP 7 project team was led by McDowell Group, a research and consulting firm with offices in Juneau and Anchorage. McDowell Group was responsible for a majority of the study tasks: survey design, sample design, surveyor recruitment and training, survey implementation, visitor/resident ratio collection, traffic data collection, data entry and analysis, and reporting, among others.

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

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

Comparison with AVSP 5 and 6

The AVSP 7 methodology followed AVSP 5 and 6 methodologies very closely, allowing for a high degree of comparability between the three studies. Trend data can be found in *Section 3: Visitor Volume* and *Sections 4-7: Visitor Profile*. Because of the large volume of data presented in *Sections 8-19,* it was not practical to include 2006 and 2011 results alongside 2016. To compare data for additional markets, readers are referred to the previous reports, available at:

www.commerce.alaska.gov/web/ded/DEV/TourismDevelopment/TourismResearch.aspx

There were a few changes in AVSP 7 from the previous generation.

- There were fewer surveys overall (5,926 compared with 6,747 in 2011). The lower sample target was intentional and reflected the decision to rely more heavily on intercept surveys, and less on online surveys, in 2016.
    - While online surveys boosted sample sizes considerably in previous generations, low online response rates in 2011 increased fielding costs and decreased the value of online surveys.
    - In addition, intercept surveys collect more accurate information, because a surveyor is able to answer questions and correctly interpret responses.
- The large increase in intercept surveys in 2016 (5,147, up from 3,563 in 2011) increases data accuracy, particularly for visitor spending, which is not collected in the online method.
- Several questions were changed, and several new questions added, based on client input.
- Dozens of additional communities were coded, allowing for seven new Summary Profiles and greater detail and accuracy in tracking visitor destinations within Alaska.
- Besides additional community profiles, the report contains a number of new "special interest" profiles: fly/drive, small cruise ship, independent visitors, cultural travelers, party size (one, two, and three-plus people), first-time visitors, visitors very likely to return to Alaska, and cruise type (round trip, cross-gulf, and land tour).

Report Organization

The report is organized into the following sections. The Visitor Profile sections (Sections 4-7) presents the results of the visitor survey, for all visitors as well as by transportation market (air, cruise, and highway/ferry), comparing results of 2006, 2011, and 2016. The Summary Profiles (Sections 8-18) present summarized 2016 survey results based to over 70 different subgroups, while Section 19 presents more detailed results based to international visitors, plus eight sub-markets.

- Section 1: Executive Summary
- Section 2: Introduction
- Section 3: Visitor Volume
- Section 4: Visitor Profile - Trip Purpose, Packages, Transportation, Length of Stay, and Lodging
- Section 5: Visitor Profile - Destinations and Activities
- Section 6: Visitor Profile - Satisfaction, Repeat Travel, and Trip Planning
- Section 7: Visitor Profile - Demographics and Spending
- Section 8: Summary Profiles – Trip Purpose
- Section 9: Summary Profiles – Fly/Drive, Highway, Ferry, and Campground Users
- Section 10: Summary Profiles - U.S. Regions and Canada
- Section 11: Summary Profiles – Southcentral Region and Communities
- Section 12: Summary Profiles – Southeast Region and Communities
- Section 13: Summary Profiles – Interior Region and Communities
- Section 14: Summary Profiles – Southwest and Far North Regions and Communities
- Section 15: Summary Profiles – Adventure, Culture, and Fishing Markets
- Section 16: Summary Profiles – Independent, Small Ship, Independent Cruise, B&B, and Group Markets
- Section 17: Summary Profiles – Party Size and Repeat Visitors
- Section 18: Summary Profiles – Cruise Type 2011 and 2016
- Section 19: International Visitors
- Section 20: Methodology

How to Read the Tables in this Report

Unless otherwise noted, all numerals in the tables displaying survey results are percentages of the sample population noted in the table heading (top row). For example, in Section 4, the first table shows Trip Purpose rates. Under the heading “Air 2016,” in the row “Vacation/pleasure,” the number 49 means that 49 percent of summer 2016 air visitors were traveling for the purposes of vacation/pleasure.

Acknowledgements

AVSP 7 was funded by the State of Alaska. Midway through the project, administration of the contract was transferred from DCCED to the Alaska Travel Industry Association (ATIA).

In addition to DCCED and ATIA, the AVSP 7 study team would like to acknowledge the following agencies and organizations for their assistance with the project.

Alaska Airlines
Alaska Department of Transportation and Public Facilities
Alaska Marine Highway System
Alaska Marine Highway Ketchikan Terminal
Alaska Tourism Marketing Board
Cruise Line Agencies of Alaska
Delta Airlines
Fairbanks International Airport
Juneau International Airport
Ketchikan International Airport
Sitka Airport
Ted Stevens Anchorage International Airport
U.S. Customs and Border Protection
Yukon Department of Tourism and Culture

AVSP 7 – Summer 2016

Section 3: Visitor Volume

McDowell GROUP

Introduction

This section presents estimates of the number of out-of-state visitors that came to Alaska between May 1 and September 30, 2016. The visitor volume phase of the AVSP project involves three major tasks: conducting visitor/resident tallies at exit points, compiling exiting traffic data, and applying the visitor/resident ratios to the traffic data to arrive at visitor volume estimates.

As detailed in Table 3.1 below, 57,441 visitors and residents were tallied in Summer 2016. Visitor and resident tallies are broken into five groups, depending on travel mode.

TABLE 3.1 - Tally Locations and Volume, AVSP 7 – Summer 2016

Mode	Tally Locations	Passengers Tallied
Air	Anchorage, Fairbanks, Juneau, Ketchikan, Sitka airports	53,394
Highway	Survey stations on Klondike, Haines, Alcan, and Taylor highways[1]	4,047
Ferry	None; based on AMHS passenger residency data	0
Cruise Ship	None; all passengers considered to be visitors	0
	Total Tallied:	**57,441**

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

A full description of these tasks is provided in the *Section 14: Methodology.*

This section contains the following chapters:

Alaska Visitor Volume
Visitor Industry Indicators
Visitor Volume by Origin and Trip Purpose

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

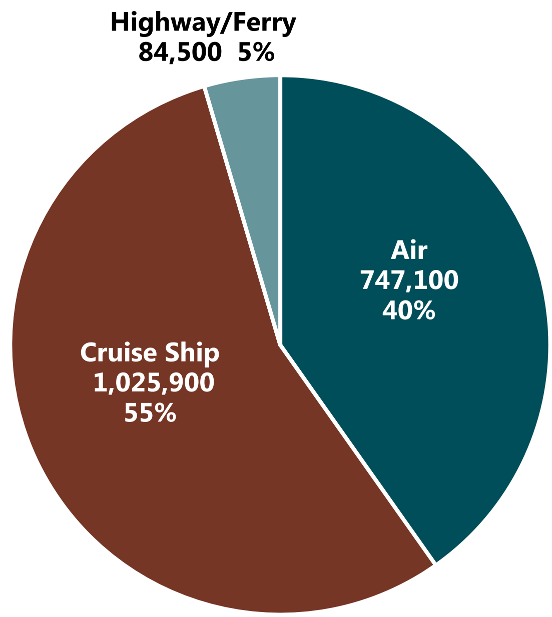
Volume by Transportation Market

An estimated 1,857,500 out-of-state visitors came to Alaska between May and September 2016. In terms of transportation market, 1,025,900 were cruise ship passengers, 747,100 were air visitors (entered *and* exited the state by air), and 84,500 were highway/ferry visitors (entered *or* exited the state by highway *or* ferry).

AVSP methodology counts visitors as they exit the state, by transportation mode (airport, highway, ferry, and cruise ship). However, measuring traffic by transportation market is useful because many cruise ship passengers exit the state via air; in addition, the highway and ferry markets overlap, making it practical to group them together.

Survey results are reported for the total visitor market as well as these three transportation markets in the Sections 4-7 of this report.

CHART 3.1 - Alaska Visitor Volume by Transportation Market, Summer 2016

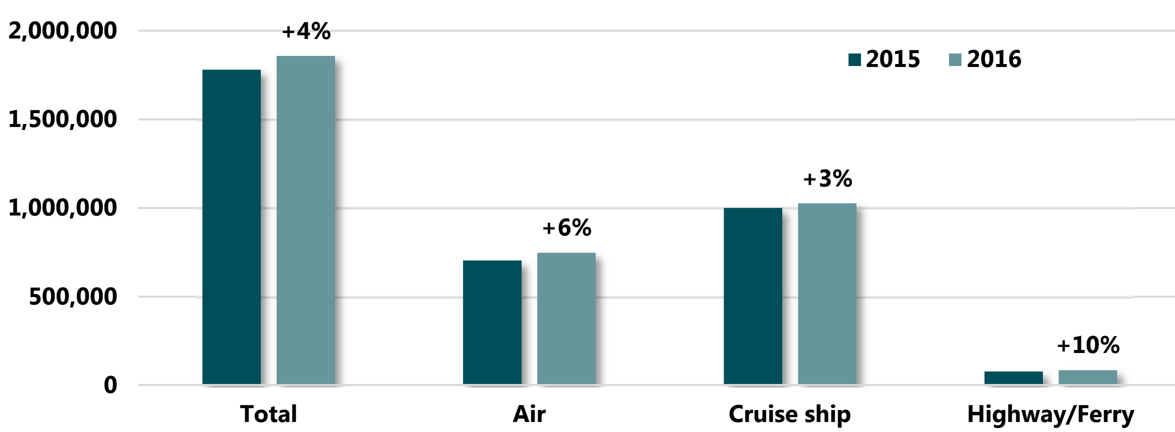


Total Visitor Volume: 1,857,500

Change from Summer 2015

Summer 2016 visitor volume represented an increase of 4 percent (77,500 visitors) from summer 2015. The bulk of the increase is attributable to the air market, which increased by 6 percent (43,700 visitors). The cruise market increased by 3 percent (26,300 visitors), while the highway/ferry market increased by 10 percent (7,500 visitors). Visitation trends are discussed in more detail, below.

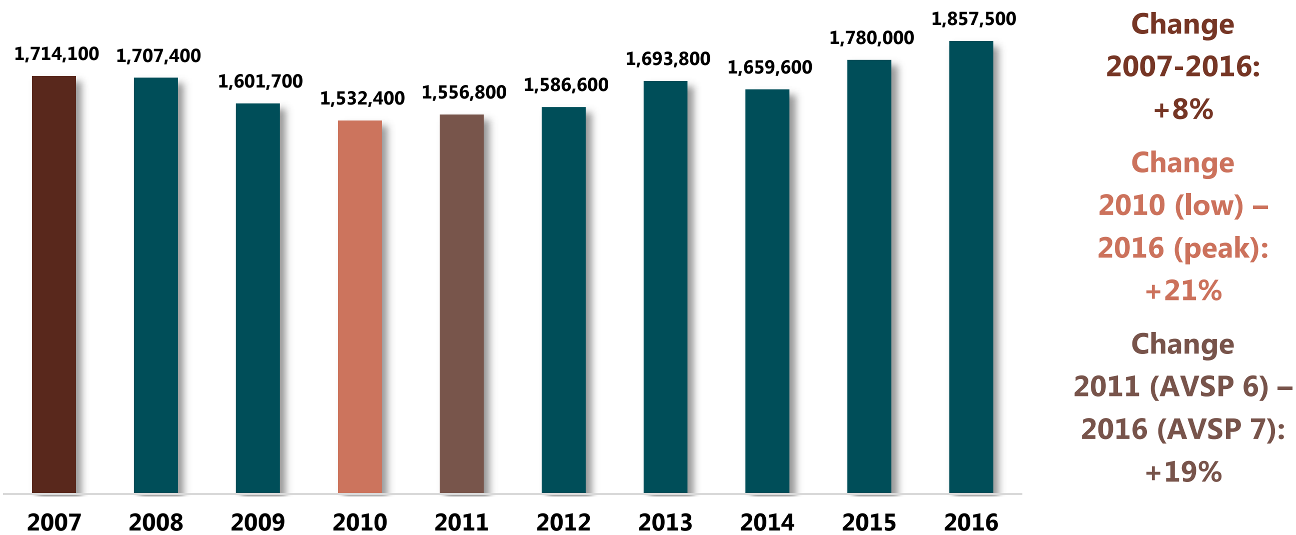
CHART 3.2 - Alaska Visitor Volume, Total and By Transportation Market, Summers 2015 and 2016



Visitor Traffic Trends

The summer 2016 visitor volume of 1,857,500 represents the highest volume on record. From a long-term perspective, the 2016 volume is 8 percent higher than the volume visiting Alaska a decade earlier in 2007, and 21 percent higher than the low point of 2010. The 2016 volume is 19 percent higher than when the last AVSP was conducted, in 2011.

CHART 3.3 - Alaska Visitor Volume, Summers 2007-2016



Sources: AVSP 6 and 7.

Trends by Transportation Market

The following chart and table show how visitor volume to Alaska has fluctuated over the last six summers (since the last AVSP was conducted in 2011), broken down by air, cruise, and highway/ferry transportation markets.

The air market held relatively steady at around 600,000 between 2011 and 2014, followed by significant jumps in 2015 and 2016 (13 percent increase from 2014 to 2015 and 6 percent increased from 2015 to 2016). Overall, the air market increased by 24 percent between 2011 and 2016.

Alaska's cruise passenger volume increased 16 percent from 2011 to 2016, recovering from significant declines in 2010 and 2011. In 2016, 1.025 million cruise passengers visited Alaska, just below the record years of 2007 through 2009.

The highway/ferry market was relatively static from 2011 through 2014, followed by growth in 2015 and 2016. Overall, the highway/ferry market increased by 22 percent between 2011 and 2016.

Increases across the three transportation markets are likely attributable to several factors, including a recovering U.S. economy, cruise market growth, strong appeal relative to other destinations, and lower gas prices (affecting both highway traffic and airfares).

See chart and table, next page.

CHART 3.4 - Trends in Summer Visitor Volume, By Transportation Market, 2011-2016

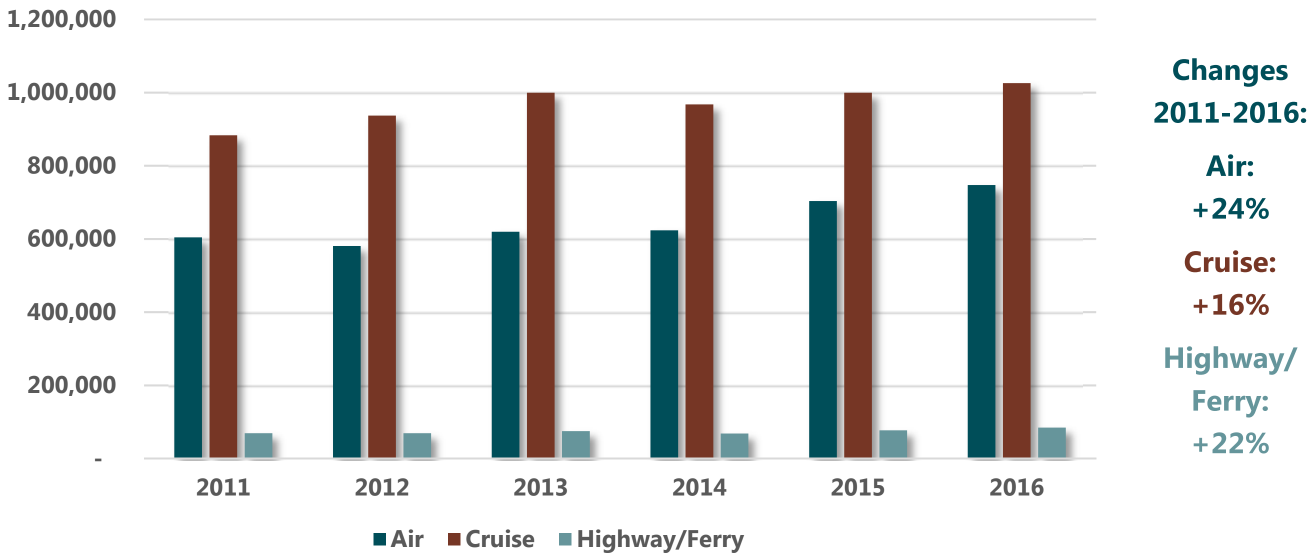


TABLE 3.2 - Trends in Summer Visitor Volume, By Transportation Market, 2011-2016

	2011	2012	2013	2014	2015	2016
Air	604,500	580,500	619,400	623,600	703,400	747,100
Cruise ship	883,000	937,000	999,600	967,500	999,600	1,025,900
Highway/Ferry	69,300	69,100	74,800	68,500	77,000	84,500
Total	**1,556,800**	**1,586,600**	**1,693,800**	**1,659,600**	**1,780,000**	**1,857,500**
% change YOY	*+1.6%*	*+1.9%*	*+6.8%*	*-2.0%*	*+7.3%*	*+4.4%*

Sources: AVSP 6 and 7.

Visitor/Resident Ratios

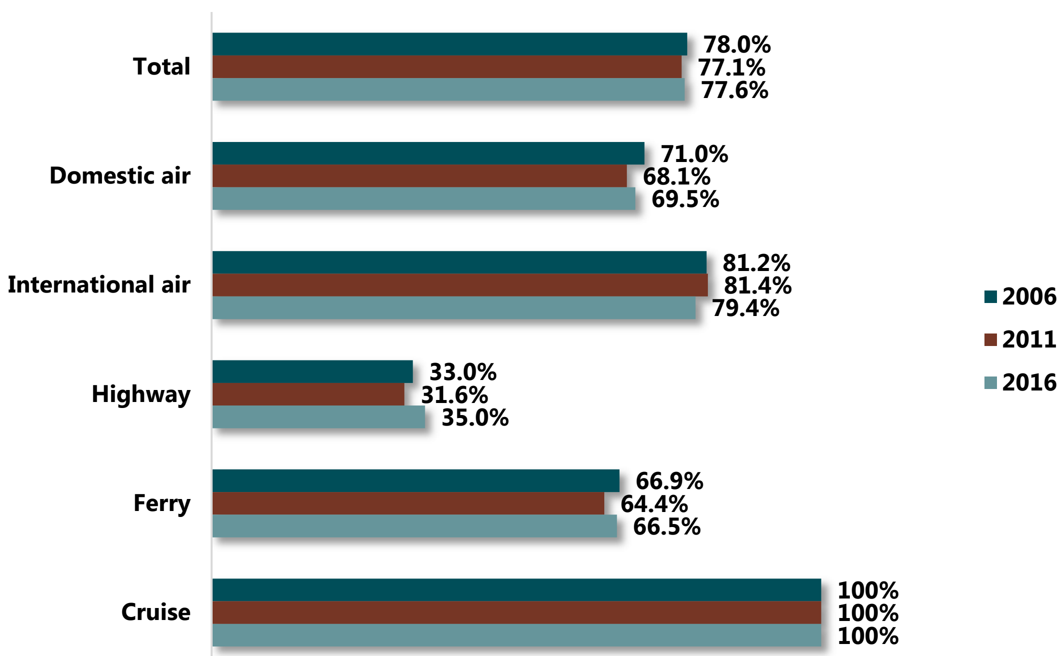
The following chart shows the percentage of visitors out of total traffic by each mode in summer 2016. For domestic air, international air, and highway modes, the ratios below represent a composite of ratios collected by location, compiled on a monthly basis. For summer 2016, over 57,000 tallies were conducted of travelers to determine the ratios. No tallies were conducted of cruise ship passengers, as 100 percent are considered visitors. No tallies were conducted of ferry passengers; visitor/resident from summer 2015 (the last year AMHS required passenger zip codes) were applied to 2016 traffic.

For three of the transportation modes, the proportion of out-of-state travelers increased slightly between 2011 and 2016. In 2011, 68.1 percent of all travelers exiting Alaska via domestic air were visitors; that figure increased to 69.5 percent in 2016. The highway ratio increased from 31.6 to 35.0 percent, and ferry increased from 64.4 to 66.5 percent. The only mode showing a decrease was international air, which fell slightly from 81.4 to 79.4 percent.

Because ratios are applied to traffic data on a monthly and by-location basis, they cannot be applied to overall traffic numbers. Details on how these ratios were collected and applied to traffic data can be found in the Methodology section.

It is important to note that the highway ratio refers to highway travelers who are exiting the state for the final time on their trip. This eliminates the possibility of double-counting visitors who exit the state twice – for example, ferry passengers who exit the state at Beaver Creek, then re-enter at Haines to board a ferry.

CHART 3.5 – Visitor Percentage of Exiting Travelers, by Mode, Summer 2006, 2011, and 2016



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

Visitor Industry Indicators

To provide context for the 2016 visitor season, this section highlights major travel and economic trends in the US, as well as internationally. Trends in cruise travel are also discussed as this market represents the largest volume of summer visitors to the state each year. A variety of data concerning trends in Alaska's tourism market (such as bed tax, ferry ridership, and non-resident fishing license sales) are also included in order to provide additional indicators of visitor traffic, activities, and spending. Where possible, data is provided for the six years since the last AVSP study (2011-2016).

U.S. Economic Indicators

With four out of five Alaska visitors originating from within the U.S., the health of the nation's economy plays an influential role in Alaska visitor volume. While the previous AVSP was conducted in 2011 while the country was in a recession, the period covered in this report saw a rebound and steady economic growth.

- Gross Domestic Product (GDP) is a measure of the overall value of goods and services produced within the U.S. each year. Broadly interpreted, changes in the GDP are an indicator of the health of the U.S. economy, reflecting economic growth or contraction. GDP grew steadily at rates of roughly 3 to 4 percent from 2011 through 2016.
- While lagging the rebound of the GDP following the U.S. recession, the nation's unemployment rate declined steadily from 2011 to 2015. The rates in 2015 and 2016 (5.3 and 4.9 percent, respectively) represent a return to prerecession levels.
- The rate of inflation as measured by changes in the national Consumer Price Index (CPI) has remained low in recent years, ranging from 3.1 percent in 2011 to 0.1 percent in 2015.
- The Anchorage CPI increased 8.1 percent from 2011 through 2016, compared to only 6.7 percent for the U.S. during the same time period.

TABLE 3.3 - U.S. Economic Indicators, 2011-2016

	2011	2012	2013	2014	2015	2016
GDP ($ Billions)	$15,518	$16,155	$16,692	$17,393	$18,037	$18,566
% change YOY	*+3.7%*	*+4.1%*	*+3.3%*	*+4.2%*	*+3.7%*	*+2.9%*
Unemployment Rate	8.9%	8.1%	7.4%	6.2%	5.3%	4.9%
U.S. Consumer Price Index	224.9	229.6	232.9	236.7	237.0	240.0
% change YOY	*+3.1%*	*+2.1%*	*+1.5%*	*+1.6%*	*+0.1%*	*+1.3%*
Anchorage CPI	201.4	205.9	212.4	215.8	216.9	217.8
% change YOY	*+3.2%*	*+2.2%*	*+3.1%*	*+1.6%*	*+0.5%*	*+0.4%*

Source: Economic Research Division, Federal Reserve Bank of St. Louis; U.S. Bureau of Labor Statistics.

Domestic Travel

Several measures of overall domestic travel in the U.S. are presented in the following table and chart. Overall, U.S. domestic travel increased by 11.0 percent between 2011 and 2016, including a 12.7 percent increase in leisure travel and a 4.9 percent increase in business travel. As the economy slowly recovered from the recession, domestic travel increased modestly from 2010 through 2013, with annual increases of 1.4 to 1.6 percent. In 2014 and 2015, domestic travel grew at higher rates (2.4 and 3.3 percent, respectively), followed by 1.8 percent growth in 2016. Leisure travel accounted for 79 percent of domestic person-trips in 2016.

In comparison to overall domestic travel, Alaska visitor traffic grew at a significantly faster rate between 2011 and 2016: 19.3 percent, compared to 11.0 percent.

Another key measure is the price of fuel as it impacts the cost of vehicle travel as well as airline ticket prices. Fuel prices within Alaska range from somewhat higher to significantly higher than the national average depending on location. Average U.S. gasoline prices stayed between $3.53 to $3.64 from 2011 to 2014, followed by a drop to $2.45 in 2015 and $2.15 in 2016.

U.S. occupancy rates averaged 65.5 percent in 2016, up from 60.0 percent in 2011. Over the same period, average daily room rates increased 22 percent to $124 – all contributing to an impressive 33 percent increase in revenue per available room from 2011 to 2016.

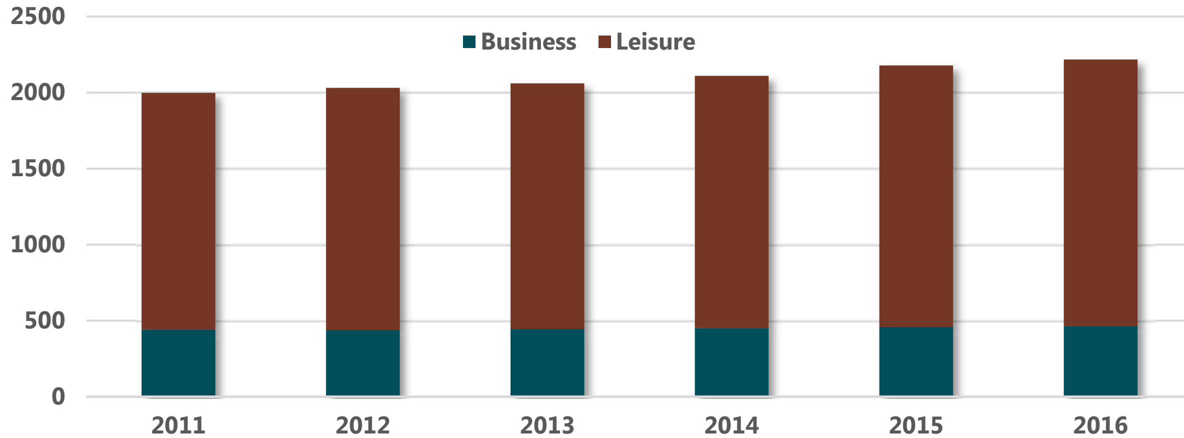
TABLE 3.4 - U.S. Travel Indicators, 2011-2016

	2011	2012	2013	2014	2015	2016
Total Domestic Person-Trips (Millions)*	1,997.50	2,030.30	2,059.60	2,109.30	2,178.20	2,217.10
% change YOY	*+1.6%*	*+1.6%*	*+1.4%*	*+2.4%*	*+3.3%*	*+1.8%*
Business	440.7	439.4	444.9	451	459.4	462.2
% change YOY	*-2.4%*	*-0.3%*	*+1.3%*	*+1.4%*	*+1.9%*	*+0.6%*
Leisure	1,556.80	1,590.90	1,614.70	1,658.30	1,718.80	1,754.9
% change YOY	*+2.8%*	*+2.2%*	*+1.5%*	*+2.7%*	*+3.6%*	*+2.1%*
Average U.S. fuel price (unleaded, per gallon)	$3.53	$3.64	$3.53	$3.37	$2.45	$2.15
% change YOY	*+26.5%*	*+3.1%*	*-3.0%*	*-4.5%*	*-27.3%*	*-12.2%*
Average U.S. Occupancy Rate	60.0%	61.4%	62.3%	64.4%	65.4%	65.5%
Average Daily Rate	$101.8	$106.1	$110.0	$115.1	$120.3	$124.0
% change YOY	-	*+4.2%*	*+3.7%*	*+4.6%*	*+4.5%*	*+3.1%*
Revenue per Available Room	$61.1	$65.1	$68.5	$74.1	$78.7	$81.2
% change YOY	-	+6.7%	+5.2%	+8.2%	+6.2%	+3.2%

Sources: U.S. Travel Association; U.S. Department of Energy; and Smith Travel Research. *Trips of 50 miles or more, one way, away from home or including one or more nights away from home.

See chart, next page

CHART 3.6 – U.S. Domestic Travel, Person-Trip (Millions), 2011-2016



International Visitors

While international visitors represent a relatively small share of the Alaska visitor market (9 percent in summer 2016, not including Canadians), they are an important component of the state's visitor market. International visitors are more likely to be traveling for vacation/pleasure, and they spend more money on a per-person basis while in Alaska.

International visitation to the U.S. rebounded from a low of 55 million in 2009 to nearly 63 million visitors in 2011 and 70 million visitors in 2013. Data collection methodologies changed in 2014, and data for that year and beyond are not comparable to previous years. In 2014 and 2015, international visitation to the U.S. held steady at around 75 million, followed by an increase to 76.2 million in 2016.

TABLE 3.5 - International Visitors to U.S., 2011-2016

	2011	2012	2013	2014	2015	2016
Total International Visitors to U.S. (Millions)	62.8	66.7	70.0	75.0*	74.8*	76.2*

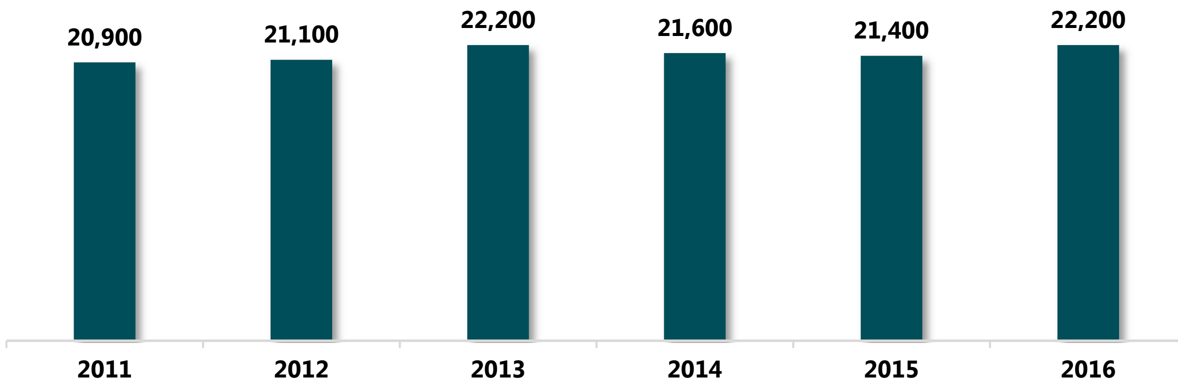
Source: U.S. Travel Association. *Data from 2014 onward collected with updated methodology to more accurately capture one-night stay international travelers.

Total international air enplanements departing Alaska increased 6.2 percent from summer 2011 to summer 2016. It is important to note that most international visitors to Alaska exit the state via other modes; however, international air traffic is a valuable indicator, as the vast majority of passengers are international residents. In addition, an increase in international flights to the Pacific Northwest in recent years has made Alaska more accessible to international travelers (who then fly to Alaska on domestic flights).

In 2016, by far the most dominant international carrier was Condor Air (with service to Frankfurt), followed by Icelandair. Other international airlines serving small, niche markets include Yakutia (service to Petropavlovsk-Kamcharsky), Korean Airlines, Uzbekistan Airways (chartered flights from Japan), Japan Airlines, and All Nippon.

See chart, next page.

CHART 3.7 – Summer International Air Enplanements Departing Alaska, 2011-2016



Sources: Alaska Department of Transportation and Public Facilities.

Cruise Industry Trends

Continuing a long-term trend, the global cruise market grew steadily between 2011 and 2016. In 2016, cruise passengers sourced from North America represented 52 percent of all cruise passengers. While global cruise passengers increased 18 percent from 2011 to 2016, North American cruise passengers increased at a more modest rate of 9 percent over the same period. Passengers from the Asia/Pacific region represented only 15 percent of global cruisers in 2016, but are the fastest growing sector (147 percent growth from 2012 to 2016). Alaska's share of the worldwide cruise capacity was 4.1 percent in 2016, and has been generally declining since the last AVSP was conducted in 2011 (4.5 percent).

TABLE 3.6 - Estimated Global and North American Cruise Passenger Volume, 2011-2016

	2011	2012	2013	2014	2015	2016
Global Cruise Passengers (millions)	20.5	20.9	21.3	22.3	23.2	24.2
% change YOY	*+10%*	*+2%*	*+2%*	*+5%*	*+4%*	*+4%*
North American Passengers (millions)	11.6	11.6	11.7	12.3	12	12.6
% change YOY	*+7%*	*0%*	*+1%*	*+5%*	*-2%*	*+5%*
Alaska Share of World Cruise Capacity	4.5%	4.4%	4.6%	4.2%	4.2%	4.1%

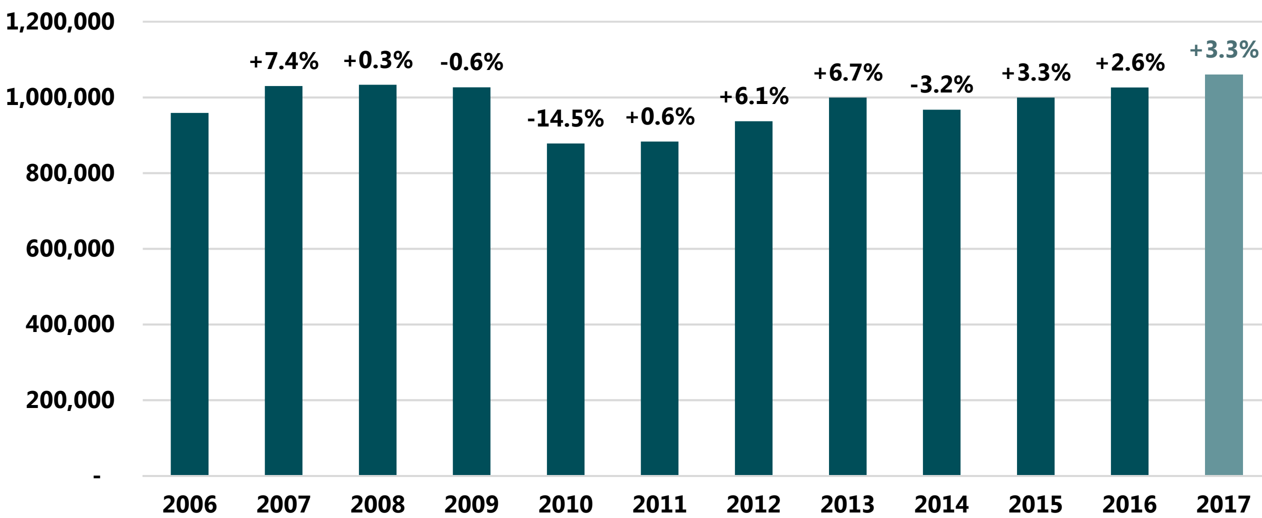
Sources: Cruise Lines International Association, Inc.; Royal Caribbean International annual SEC 10-K filing, 2017; Cruise Industry News 2015-2016 Annual Report; Cruise Lines International Association.

Alaska Cruise Industry

Alaska's cruise passenger volume increased 16 percent from 2011 to 2016, recovering from a dramatic decline in 2010. (This growth rate is slightly lower than the global growth rate of 18 percent over the same time period, but higher than the North American growth rate of 9 percent.) In 2016, 1.025 million cruise passengers visited Alaska, just below the record years experienced in 2007, 2008, and 2009. One notable trend in the last decade is in itineraries: the percentage of passengers on round-trip itineraries shifted upwards between 2006 and 2016, from roughly 60 to 70 percent.

Based on scheduled sailings, 1.06 million cruise passengers are expected to visit Alaska in 2017, representing an increase of 3.3 percent over 2016. The increase is driven by a combination of the construction of new, higher capacity vessels and the shifting of higher capacity ships to the Alaska market.

CHART 3.8 - Alaska Cruise Passenger Volume 2006-2016; 2017 Projected



Source: Cruise Line Agencies of Alaska. Notes: Percentages reflect change from previous year. 2017 figure reflects CLAA projections based on scheduled sailings.

ALASKA'S SMALL CRUISE SHIPS

Although small cruise ships (those with capacities of less than 250 passengers) make up only 1 percent of Alaska's overall cruise volume, these ships can significantly impact the communities they visit. Small ships are more likely to visit ports not frequented by larger ships (such as Petersburg). In addition, passengers can have a greater per-person economic impact because they often overnight in their Alaskan embarkation and/or disembarkation port. Over the last several years, the small ship market has stayed fairly consistent at around 15,000 passengers, including 14,400 in 2016.

Additional Alaska Tourism Indicators

Highway Traffic

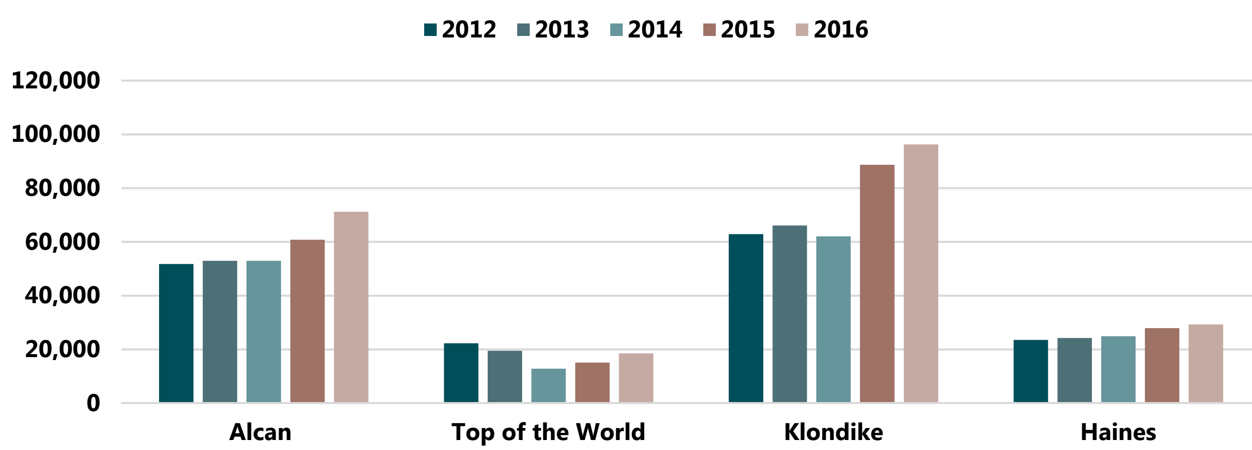
The chart and table below show the number of personal vehicle occupants crossing the border from Canada into Alaska between 2012 and 2016, broken down by the four highways connecting the jurisdictions. Over this period, combined personal vehicle crossings increased 34 percent, though there was considerable variability year to year. Between 2015 and 2016, total crossings increased 12 percent.

In 2016, Klondike Highway crossings accounted for 45 percent of combined personal vehicle Alaska/Yukon crossings, followed by those on the Alcan Highway (33 percent), Haines Highway (14 percent), and Top of the World Highway (9 percent).

The difference between 2012 and 2016 traffic varied by highway. Significant increases were seen in Klondike, Alcan, and Klondike Highway traffic (53 percent, 38 percent, and 24 percent, respectively), whereas Top of the World Highway traffic decreased 17 percent over this period.

Previous AVSPs have relied on Yukon border crossing data, as the visitor volume methodology counts Alaska visitors as they exit the state (and enter Canada). Changes in the way Yukon counts vehicle passengers in the last several years led to a change in AVSP methodology in 2015 and 2016, relying primarily on U.S. border crossing data. Additional detail is provided in *Section 17: Methodology*.

CHART 3.9 – Border Crossings by Personal Vehicle, by Highway, 2011-2016 (May – September)



Source: U.S. Customs and Border Patrol.

Alaska Marine Highway System Ridership

The table below details summer ridership trends on Alaska Marine Highway System (AMHS) ferries, covering 2011 through 2016. Ridership includes out-of-state visitors as well as residents (visitors are broken out where possible). The table also shows the number of out-of-state visitors who exited Alaska via the Alaska Marine Highway System (disembarking in Bellingham or Prince Rupert).

Between 2011 and 2016, AMHS summer ridership decreased by 27 percent, with most of the declines occurring after 2013. The largest declines were seen in summer 2015, when total ridership declined 13 percent, non-resident ridership dropped 17 percent, and non-residents using the ferry system to exist Alaska declined 12 percent. Budget cuts coupled with ferry maintenance issues contributed to widespread schedule modifications and cancellations of sailings – with serious implications for local residents and visitors. In 2016, the State of Alaska began a process to explore and implement new governance models for the AMHS system to enhance the predictability and sustainability of the ferry system.

TABLE 3.7 - Alaska Marine Highway System Ridership, 2011-2016 (May-September)

	2011	2012	2013	2014	2015	2016
Total ridership	215,868	213,699	221,921	201,941	175,144	157,007
% change YOY		*-1.0%*	*+3.8%*	*-9.0%*	*-13.3%*	*-10.4%*
Non-resident passengers	87,479	85,471	82,684	86,905	72,289	n/a
% change YOY	*3.2%*	*-2.3%*	*-3.3%*	*+5.1%*	*-16.8%*	*n/a*
Non-resident passengers exiting Alaska	9,900	9,200	9,300	8,900	7,800	6,900
% change YOY	*-1.0%*	*-7.1%*	*+1.1%*	*-4.3%*	*-12.4%*	*-11.5%*

Source: Alaska Marine Highway System. 2016 non-resident exits estimated by McDowell Group for AVSP 7.

Non-Resident Fishing License Sales

The sale of all non-resident Alaska fishing licenses combined increased 16 percent from 2011 to 2016. A decline of 2 percent occurred between 2011 and 2012, followed by consistent growth through 2016.

When broken down by type of fishing license (1-day, 3-day, 14-day, and annual licenses), the same trends were generally present. However, it is interesting to note that annual non-resident license sales increased 20 percent from 2011 to 2016, whereas 14-day license sales increased only 11 percent over this time period. Other types of non-resident licenses increased at rates close to the average for all combined (16 percent).

TABLE 3.8 - Non-Resident Fishing License Sales, 2011-2016

	2011	2012	2013	2014	2015	2016
1-day non-resident fishing licenses	93,120	90,984	97,206	99,093	105,728	110,164
% change YOY	*+3.3%*	*-2.3%*	*+6.8%*	*+1.9%*	*+6.7%*	*+4.2%*
3-day non-resident fishing licenses	48,524	46,608	48,977	51,296	54,023	55,881
% change YOY	*+0.8%*	*-3.9%*	*+5.1%*	*+4.7%*	*+5.3%*	*+3.4%*
7-day non-resident fishing licenses	75,275	73,924	77,268	79,434	82,427	86,458
% change YOY	*+0.0%*	*-1.8%*	*+4.5%*	*+2.8%*	*+3.8%*	*+4.9%*
14-day non-resident fishing licenses	20,820	20,775	20,482	20,668	22,007	23,028
% change YOY	*+2.4%*	*-0.2%*	*-1.4%*	*+0.9%*	*+6.5%*	*+4.6%*
Annual non-resident fishing licenses	21,101	21,403	22,338	23,044	24,730	25,331
% change YOY	*-2.0%*	*+1.4%*	*+4.4%*	*+3.2%*	*+7.3%*	*+2.4%*
Total non-resident fishing licenses	**258,840**	**253,694**	**266,271**	**273,535**	**288,915**	**300,862**
% change YOY	***+1.3%***	***-2.0%***	***+5.0%***	***+2.7%***	***+5.6%***	***+4.1%***

Source: Alaska Department of Fish & Game.

Select Community Bed Tax Collections

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

Table 3.9 includes bed tax revenues for Quarters 2 and 3 for 2011 through 2016, for five communities for which comparable data were available. In all areas, summer bed tax collections increased over this period. Collections in the City and Borough of Juneau increased the most (49 percent increase from 2011 to 2016), followed by Sitka (48 percent increase), Denali Borough (40 percent), Municipality of Anchorage (20 percent), and Fairbanks (15 percent).

The Municipality of Anchorage collects the most bed tax revenue in the state by far. While increases of 4.4 to 7.9 percent were seen in Anchorage from 2011 through 2015, it should be noted that 2016 saw a decline of 4.7 percent.

TABLE 3.9 - 2nd and 3rd Quarter Bed Tax Revenue Trends, 2011-2016

	2011	2012	2013	2014	2015	2016
Anchorage	$14,634,811	$15,476,724	$16,160,869	$17,437,245	$18,465,227	$17,596,654
% change	*+8.0%*	*+5.8%*	*+4.4%*	*+7.9%*	*+5.9%*	*-4.7%*
Fairbanks	$3,199,476	$3,443,718	$3,167,773	$3,207,031	$3,418,598	$3,666,605
% change	*-4.5%*	*+7.6%*	*-8.0%*	*+1.2%*	*+6.6%*	*+7.3%*
Denali	$2,507,100	$2,588,192	$2,854,485	$3,092,426	$3,325,860	$3,504,559
% change	*n/a*	*+3.2%*	*+10.3%*	*+8.3%*	*+7.5%*	*+5.4%*
Sitka	$269,611	$285,585	$266,546	$328,987	$355,234	$399,842
% change	*+3.4%*	*+5.9%*	*-6.7%*	*+23.4%*	*+8.0%*	*+12.5%*
Juneau	$718,868	$784,967	$875,913	$953,970	$1,022,622	$1,067,974
% change	*-2.6%*	*+9.2%*	*+11.6%*	*+8.9%*	*+7.2%*	*+4.4%*

Sources: Municipality of Anchorage, Explore Fairbanks, Denali Borough, City and Borough of Sitka, City and Borough of Juneau.
Note: Fairbanks includes combined revenues from the City of Fairbanks, Fairbanks North Star Borough, and the City of North Pole.

RV and Vehicle Tax Collection

Anchorage vehicle rental revenues increased by 14 percent between 2011 and 2016. Over the same period, RV rental revenue increased 47 percent. Anchorage vehicle rental and RV rental revenues generally follow similar trends. In 2015, however, they diverged widely, with vehicle rental revenue declining nearly 2 percent from 2014 and RV rental revenue increasing 17 percent over the same period.

TABLE 3.10 – Anchorage RV and Car Rental Revenues, 2nd and 3rd Quarters, 2011-2016

	2011	2012	2013	2014	2015	2016
Vehicle rental revenue	$4,136,982	$3,987,097	$4,187,202	$4,615,054	$4,544,920	$4,735,611
% change YOY	*+7.4%*	*-3.6%*	*+5.0%*	*+10.2%*	*-1.5%*	*+4.2%*
RV rental revenue	$899,100	$858,991	$999,180	$1,078,831	$1,257,743	$1,324,327
% change YOY	*+8.1%*	*-4.5%*	*+16.3%*	*+8.0%*	*+16.6%*	*+5.3%*

Source: Municipality of Anchorage. Note: These figures include revenues generated by Alaska residents as well as visitors.

The State of Alaska also collects RV and car rental taxes, showing similar trends to revenue collections in Anchorage. (These figures are exclusive of Anchorage tax revenues.)

TABLE 3.11 – State of Alaska RV and Car Rental Revenues, 2nd and 3rd Quarters, 2011-2016

	2011	2012	2013	2014	2015	2016
Vehicle rental revenue	$5,793,843	$5,662,107	$5,940,035	$6,757,214	$6,834,437	$7,104,929
% change YOY	*+6.2%*	*-2.3%*	*+4.9%*	*+13.8%*	*+1.1%*	*+4.0%*
RV rental revenue	$363,363	$352,644	$401,124	$437,276	$490,867	$518,345
% change YOY	*+10.5%*	*-2.9%*	*+13.7%*	*+9.0%*	*+12.3%*	*+5.6%*

Source: Alaska Department of Revenue. Note: These figures include revenues generated by Alaska residents as well as visitors.

Alaska Population Trends

Alaska's resident population increased 2.3 percent between 2011 and 2016, though most of this increase occurred in 2011 and 2012. The natural increase – births minus deaths – in Alaska's population remained roughly the same throughout this period, with the state's population decline largely coming from out migration. In 2011, the state saw net migration of 1,105 people entering the state. From 2012 through 2016, the state saw a net out migration of between 2,711 and 6,679 people each year.

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

	2011	2012	2013	2014	2015	2016
Alaska population	722,886	731,238	735,859	736,818	737,183	739,828
% change YOY	*+1.24%*	*+1.16%*	*+0.63%*	*+0.13%*	*+0.05%*	*+0.36%*

Source: Alaska Department of Labor and Workforce Development.

Visitor Volume to Alaska Regions and Destinations

The chart below and on the following page show estimated visitor volume to Alaska regions and destinations, day or overnight, for summers 2011 and 2016. All destinations with a minimum of 5,000 estimated visitors are shown.

These figures were derived from applying survey results by market (air, cruise, highway/ferry) to total volume estimates by market, then combining the results. For both regional and destination volume estimates, some adjustments were made based on additional research, in most cases data from Cruise Line Agencies of Alaska (CLAA). For example, a higher proportion of cruise passengers surveyed went to Ketchikan than what is shown in CLAA data; the portion of Ketchikan visitation attributable to cruise passengers was therefore adjusted downward. Additional (minor) adjustments were made based on land tour volume information gathered from cruise lines and Haines-Skagway fast ferry passenger volumes.

The Southeast region received the highest number of Alaska visitors at 1,212,000, followed by Southcentral at 975,000, Interior at 543,000, Southwest at 84,000, and Far North at 33,000. Visitation to each of Alaska's five regions increased between 2011 and 2016, reflecting the strong increases discussed earlier in this section. Growth was strongest in the Southeast region which saw 175,000 more visitors in 2016 compared to 2011, and weakest in the Far North region, which saw a bump of only 2,000 additional visitors.

The following page shows visitor volume to Alaska destinations. Juneau, Ketchikan, and Anchorage were the three most-visited Alaska communities in both 2011 and 2016. Most destinations experienced an increase in visitor volume between 2011 and 2016, with some exceptions. Additional detail on visitation to regions and destinations, and factors influencing changes over time, can be found in Section 5.

CHART 3.10 – Estimated Visitor Volume to Alaska Regions, Summers 2011 and 2016

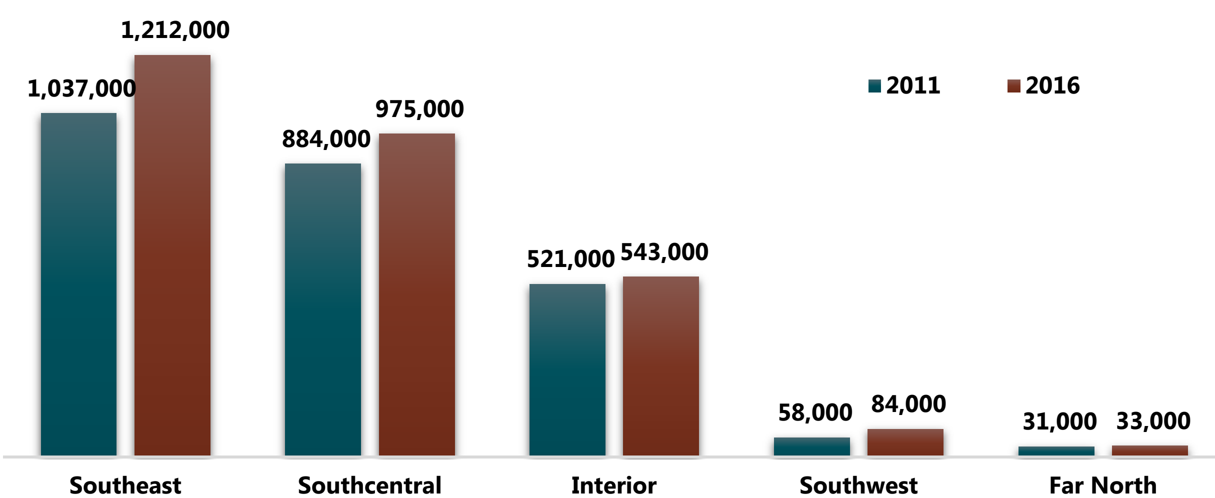
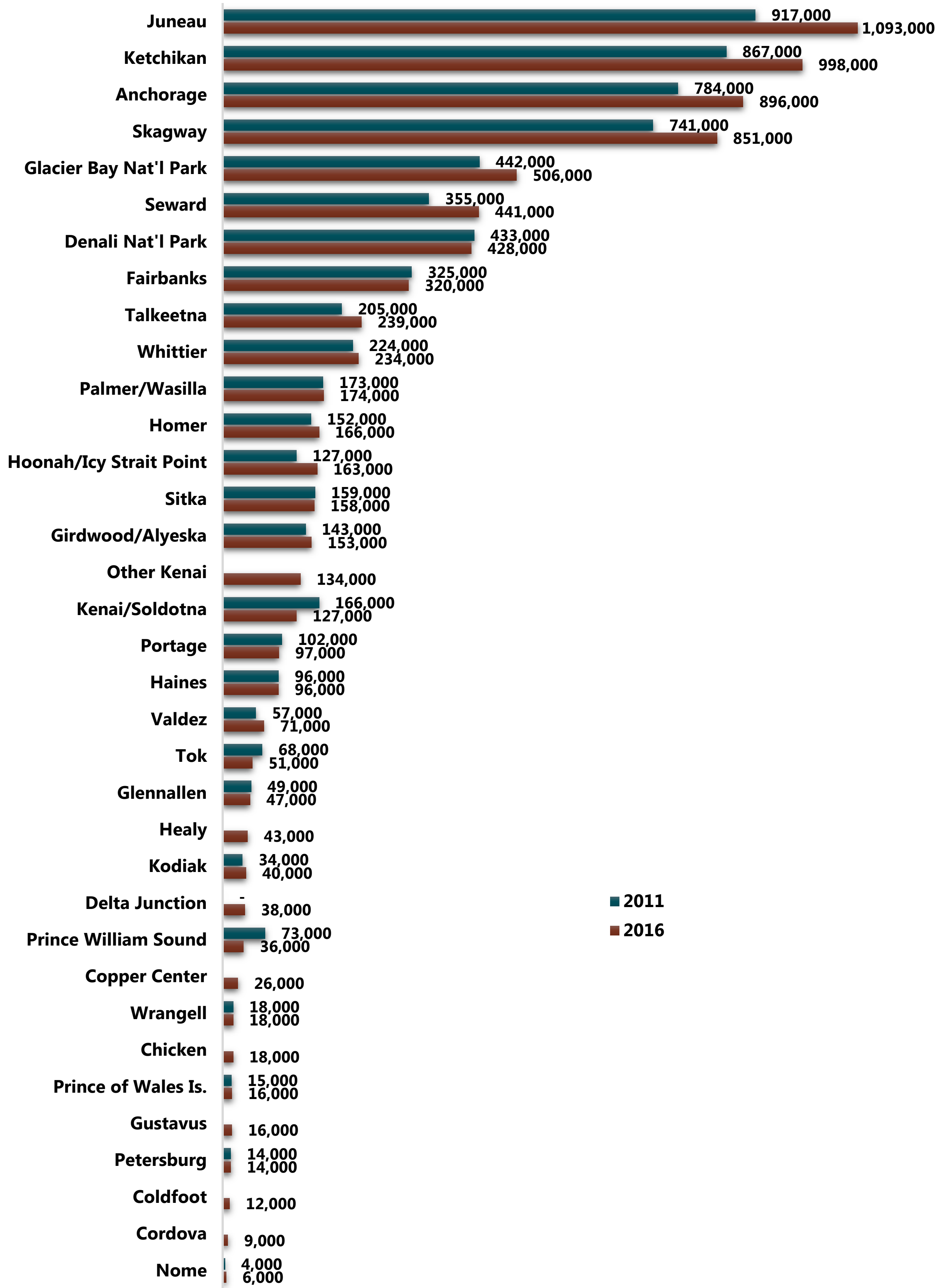


CHART 3.11 - Estimated Visitor Volume to Alaska Destinations, Summers 2011 and 2016



Note: Changes in AVSP 7 resulted in visitation estimates for several new locations.

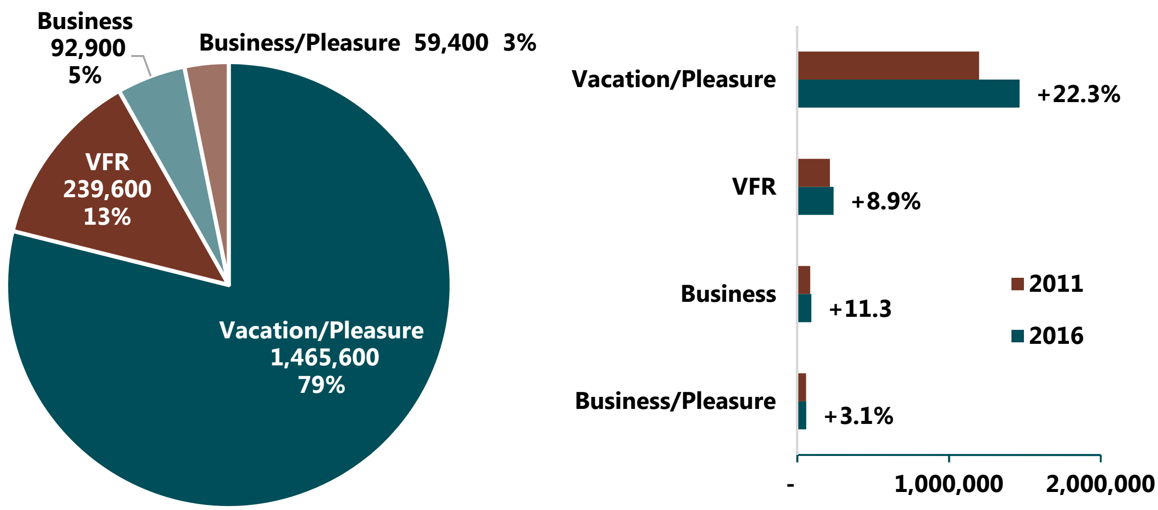
Visitor Volume by Trip Purpose and Origin

Volume by Trip Purpose

Roughly 1.45 million summer 2016 visitors traveled for vacation/pleasure. Those visiting friends and relatives (VFRs) represent the second-largest trip purpose market at 239,600, followed by business (92,900), and business/pleasure (59,400). Volumes were derived by applying survey percentages to total visitor volume.

While all trip purpose markets grew between 2011 and 2016, vacation/pleasure grew at an especially high rate (22 percent).

CHART 3.12 - Summer 2016 Alaska Visitor Volume, By Trip Purpose, and % Change from 2011



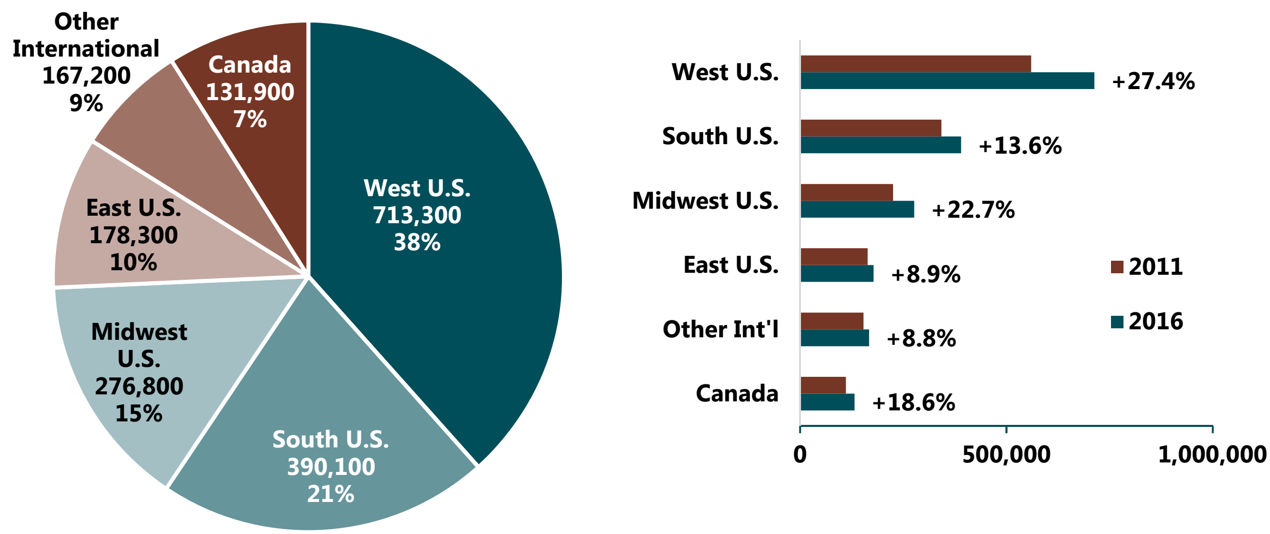
Volume by Region of Origin

Alaska visitors are most likely to be from the Western U.S., representing 713,300 visitors, followed by the South (390,100), the Midwest (276,800), and the East (178,300). Canada accounted for 131,900 visitors, while other international countries accounted for a total of 167,200 visitors.

These volumes are based on results of the visitor survey. Visitors were asked what state or country they were visiting from. Additional details on visitors' state and country of origin, including the states included in each region, can be found in *Section 7*.

All regions of origin increased their visitation to Alaska from 2011 to 2016. The greatest increase was seen by visitors from the Western U.S. (27 percent increase), followed by the Midwestern U.S. (23 percent increase), Canada (19 percent), Southern U.S. (14 percent), Eastern U.S. (9 percent), and other international (9 percent).

CHART 3.13 - Summer 2016 Alaska Visitor Volume, By Origin, and % Change from 2011



AVSP 7 – Summer 2016

Section 4:
Visitor Profile -
Trip Purpose, Packages, Transportation, Length of Stay, and Lodging

McDowell GROUP

Introduction

This section, and the following three "Visitor Profile" sections, present detailed results of the visitor survey, conducted with out-of-state visitors exiting Alaska between May and September, 2016. Visitors were intercepted at all major exit points: airports, highways, cruise ship docks, and ferries. A total of 5,926 visitors were surveyed, for a maximum margin of error of ±1.3 percent at the 95 percent confidence level.[1] All data was weighted to reflect actual traffic volumes by mode of transportation. The survey methodology is explained in detail in the final section of this report.

For each question, responses are provided in two ways. Results based to all visitors are presented in chart format, comparing results for 2006, 2011, and 2016. (There are a few exceptions where data was too lengthy or complex to present in chart format.) Results by transportation market are presented in table format, also comparing results over the last three AVSP generations.

The Visitor Profile analysis is organized into four sections:

- Section 4: Visitor Profile - Trip Purpose, Packages, Transportation, Length of Stay, and Lodging
- Section 5: Visitor Profile - Destinations and Activities
- Section 6: Visitor Profile - Satisfaction, Repeat Travel, and Trip Planning
- Section 7: Visitor Profile - Demographics and Spending

The following table shows how each market is defined, their respective sample sizes, and their maximum margin of error. The three transportation markets are mutually exclusive; together, they account for the total Alaska visitor market.

TABLE 4.1 - Transportation Market Definition and Sample Sizes

Market	Definition	Sample Size	Maximum Margin of Error
All visitors	**All respondents**	**5,926**	**±1.3%**
Air	Entered *and* exited Alaska by airplane; did not spend any nights aboard a cruise ship	3,294	±1.7%
Cruise ship	Entered *or* exited Alaska by cruise ship, *or* overnighted aboard a cruise ship	1,948	±2.5%
Highway/ferry	Entered *or* exited Alaska by highway *or* ferry; did not spend any nights aboard a cruise ship	684	±3.7%

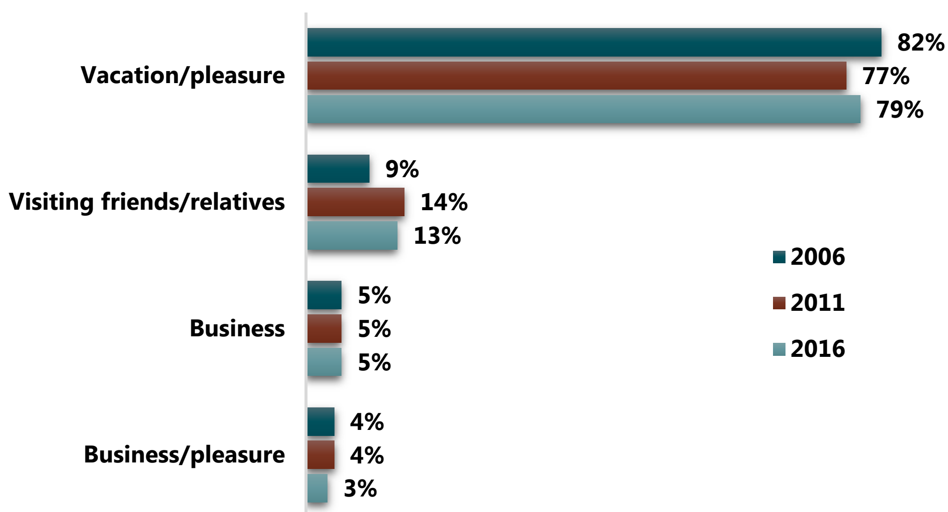
[1] Most survey responses are more accurate than maximum error factors suggest, due to the nature of response distribution in sampling statistics.

Trip Purpose

Visitors' trip purposes fall into four categories: vacation/pleasure, visiting friends/relatives (VFR), business, or business/pleasure.

- Four out of five visitors (79 percent) were traveling for vacation pleasure; 13 percent were VFRs; 5 percent were business travelers; and 3 percent were traveling for business/pleasure.
- Trip purpose rates in 2016 were generally similar to 2011, with vacation/pleasure visitors increasing slightly from 77 to 79 percent; VFRs dropping from 14 to 13 percent; business staying the same at 5 percent; and business/pleasure dropping from 4 to 3 percent. More significant differences are apparent by transportation market (see next page).
- A visitor's trip purpose has a major impact on their activities, expenditures, length of stay, trip planning, and other variables. For example, vacation/pleasure visitors tend to spend more money on their trip, while VFRs report longer average stays. An analysis of responses segmented by trip purpose is provided *Section 8*.

CHART 4.2 - Trip Purpose, All Visitors, 2006, 2011, and 2016



Transportation Market

Table 4.2 shows survey results based to transportation market: air, cruise, and highway/ferry.

- Trip purpose varied significantly according to transportation market, with cruise passengers the most likely to be traveling for vacation/pleasure (99 percent), followed by highway/ferry at 77 percent, then air at 49 percent.
- Air visitors were much more likely to be VFRs at 31 percent, compared to 18 percent of highway/ferry visitors and less than 1 percent of cruise visitors.
- Air visitors were also much more likely to be traveling for business (13 percent) or for business/pleasure (8 percent) when compared to other visitors.
- Trip purpose rates shifted most in the air market over the last three AVSP generations. The vacation/pleasure rate among air visitors fell from 51 to 43 percent between 2006 and 2011, then climbed back to 49 percent in 2016.
- The VFR rate among air travelers increased significantly (from 25 to 35 percent) between 2006 and 2011, before dipping in 2016 to 31 percent.
- Business-only and business/pleasure rates have stayed fairly steady over the years, with the percentage traveling for business-only ranging between 13 and 15 percent, and business/pleasure rates ranging between 7 and 10 percent.
- While changes did occur in highway/ferry trip purpose rates, they were less pronounced. The vacation/pleasure rate has shifted down, from 82 percent in 2006, to 80 percent in 2011, to 77 percent in 2016. The VFR rate increased, from 12 percent to 18 percent over the same time period.
- Cruise trip purpose rates have been generally consistent over the last three AVSP generations.

TABLE 4.2 - Trip Purpose, By Transportation Market, 2006, 2011, and 2016 (%)

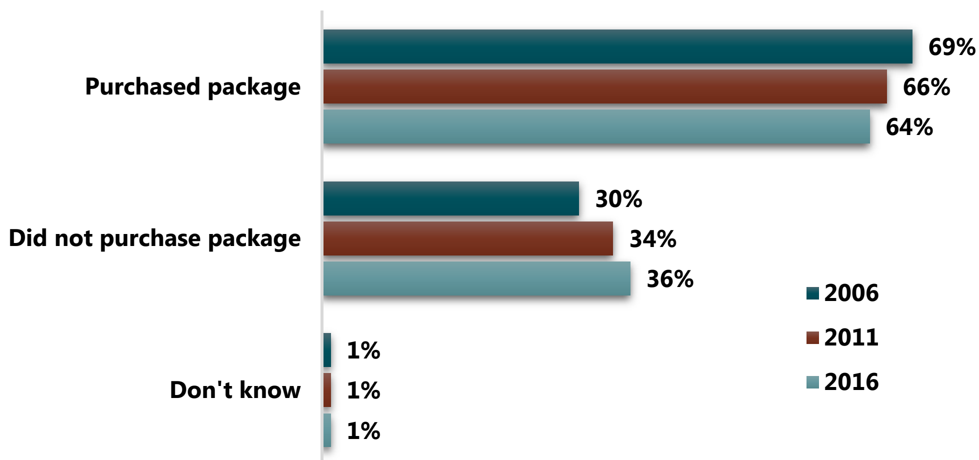
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Vacation/pleasure	51	43	49	99	98	99	82	80	77
Visiting friends or relatives	25	35	31	<1	<1	<1	12	13	18
Business only	15	14	13	<1	<1	<1	2	3	1
Business and pleasure	10	7	8	1	2	<1	5	4	4

Package Purchase

All non-cruise visitors were asked whether they had purchased any multi-day packages that included lodging, transportation, and activities. Cruise passengers were automatically included with other package visitors.

- Nearly two-thirds of Alaska visitors (64 percent) purchased an overnight package in summer 2016.
- The rate of package participation has declined over the last decade, from 69 percent in 2006, to 66 percent in 2011, to 64 percent in 2016. The decline reflects the strong increase in the air market, particularly since 2011, as well as the decrease in the role of the cruise market (from 57 to 55 percent of all visitors between 2011 and 2016). These shifts are discussed in more detail in *Section 3*.
- Independent visitors (those who did not purchase a package) are profiled separately, in *Section 16*.

CHART 4.3 – Purchase of Multi-Day Packages, All Visitors, 2006, 2011, and 2016



Transportation Market

- About one in six air visitors (16 percent) purchased a package. This rate has declined slightly over the years, from 21 percent in 2006, to 18 percent in 2011, to 16 percent in 2016.
- Just 3 percent of highway/ferry visitors purchased a package, down from 6 and 7 percent in 2006 and 2011, respectively.

TABLE 4.3 - Purchase of Multi-Day Packages
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Purchased package	21	18	16	100	100	100	6	7	3
Did not purchase package	78	80	82	-	-	-	87	92	93
Don't know	1	2	1	-	-	-	7	1	4

Note: Cruise visitors were automatically considered package visitors.

Package Type

Non-cruise visitors who had purchased a package were asked what type of package they purchased. The sample of highway/ferry visitors who purchased an overnight package in 2016 was too small for analysis.

- As in past AVSPs, the most common type of overnight package among air visitors was fishing, which increased from 46 to 50 percent between 2011 and 2016.
- Wilderness lodge packages fell from 14 percent of the air market in 2011 to 10 percent in 2016. Adventure tour package also fell, from 15, to 13, to 9 percent. (The adventure tour category includes activity-focused packages such as rafting, biking, kayaking, and hiking tours.) Rail packages increased from 8 to 11 percent between 2011 and 2016.
- Visitors who purchased an adventure tour package are profiled separately, in *Section 15*.

TABLE 4.4 - Package Type, 2006, 2011, and 2016 (%)
Base: Air Package Visitors

	AIR PACKAGE		
	2006	2011	2016
Fishing lodge package	48	46	50
Rail package	9	8	11
Wilderness lodge package	14	15	10
Adventure tour	15	13	9
Motorcoach tour	4	10	8
Rental car/RV package	n/a	6	6
Hunting	n/a	n/a	2
Other	11	2	4

Note: N/a indicates an uncoded response from previous AVSPs. The number of highway/ferry visitors who purchased packages in 2016 was too small for analysis.

Package Components

Non-cruise package visitors were asked which portions of their trip were included in their package. The sample of highway/ferry visitors who purchased an overnight package in 2016 was too small for analysis.

- The most common package components for air visitors, as in 2011, were lodging (91 percent), meals (77 percent), fishing (51 percent), and tours (43 percent).
- The largest change since 2011 in terms of trip components was in meals, which grew from 61 to 77 percent. Fishing increased from 45 to 51 percent, corresponding with the increase in that package market.

TABLE 4.5 - Portions of Trip Included in Package, 2011 and 2016 (%)
Base: Air Package Visitors

	AIR PACKAGE	
	2011	2016
Lodging	88	91
Meals	61	77
Fishing	45	51
Tours	39	43
Air	29	34
Bus/motorcoach	22	20
Railroad	21	23
Vehicle/RV rental	11	8
Ferry	4	4
Other	7	6

Note: This question was not asked in 2006. The number of highway/ferry visitors who purchased packages was too small for analysis.

Cruise Type

Cruise passengers were asked several follow-up questions about their trip.

- Nearly all (99 percent) had cruised aboard a large ship (defined as more than 250 passengers).
- Two-thirds (66 percent) were on round-trip cruises, which generally depart and return to Seattle or Vancouver, while 31 percent were on cross-gulf itineraries (where they sailed across the Gulf of Alaska and flew one-way to or from Anchorage or Fairbanks). These percentages are reflective of CLAA data, which shows 67 percent of passengers on round trip itineraries, and 31 percent on cross-gulf itineraries.
- The 31 percent who sailed on cross-gulf cruises includes 13 percent who purchased a simple cross-gulf itinerary, and 18 percent who participated in a land tour. Land tours are typically rail/motorcoach packages that include Anchorage, Denali, and Fairbanks.
- The rate of cruise passengers on round-trip itineraries has increased steadily – from 52 percent in 2006, to 59 percent in 2011, to 66 percent in 2016 – with a corresponding decline in cross-gulf passengers.
    - While the rate of land tour participation may have decreased between 2011 and 2016 due to fewer cross-gulf ships, the decline (from 24 to 18 percent) is likely overstated in the table below. The AVSP 6 report acknowledged that the 24 percent land tour participation rate was artificially high. The 2016 rate of 18 percent corresponds with actual land tour volumes gathered from industry sources.

Passengers on cross-gulf itineraries were asked: *Did you spend any nights in Alaska on your own, in addition to your cruise or land tour package?*

- When the results are based to all cruise passengers (including round trip passengers), 10 percent traveled on their own, slightly lower than the 2006 and 2011 rate of 12 percent. Among cross-gulf passengers, 31 percent traveled on their own, up slightly from the 2006 and 2011 rate of 27 percent. A profile of this market ("independent cruise") is provided in *Section 16*.

TABLE 4.6 - Cruise Package Type, 2006, 2011, and 2016 (%)
Base: Cruise Visitors

	CRUISE		
	2006	2011	2016
Large Ship vs. Small Ship			
Large	97	99	99
Small	3	1	1
Cruise Package			
Round trip	52	59	66
Cross-gulf	46	39	31
Cruise one-way, fly one-way	24	15	13
Cruise with land tour	22	24	18
In-state/small ship cruise	2	1	1
Other	n/a	n/a	1
Spent time on own before/after cruise package			
Yes – All cruise passengers	12	12	10
Yes – Cross-gulf passengers only	27	27	31

Entry/Exit Transportation

Respondents were asked what mode of transportation they used to enter Alaska. Their exit mode was automatically recorded, reflecting their survey location.

- By definition, 100 percent of air visitors both enter and exit the state by air.
- About one-sixth (14 percent) of cruise visitors entered the state via air, while slightly more (19 percent exited via air. The remainder exited/entered via cruise ship, save a few visitors who used highway or ferry one-way.
- Among highway/ferry visitors, rates of usage of highway to enter/exit has increased, while ferry usage has decreased. This reflects the increase in highway traffic, and decrease in ferry traffic, detailed in *Section 3: Visitor Volume*.

TABLE 4.7 - Transportation Modes, By Transportation Market, 2006, 2011, and 2016 (%)

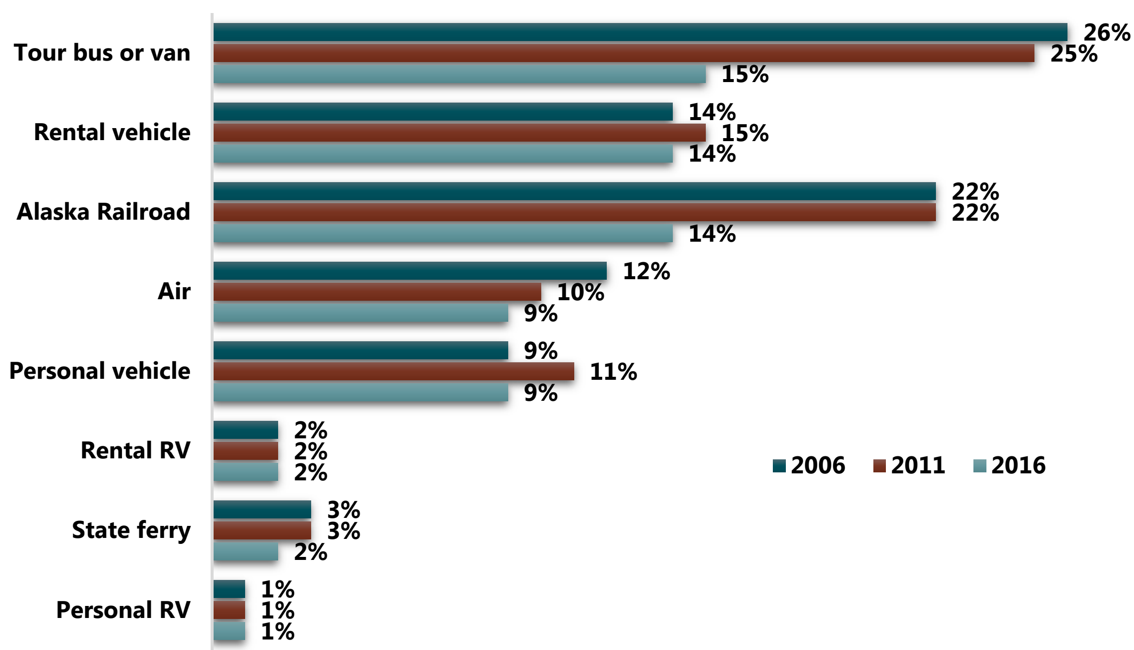
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Mode of Entry into Alaska									
Air	100	100	100	26	23	14	7	5	8
Cruise	-	-	-	73	77	86	-	-	-
Highway	-	-	-	<1	<1	<1	78	79	82
Ferry	-	-	-	<1	-	<1	15	16	10
Mode of Exit from Alaska									
Air	100	100	100	24	17	19	14	19	16
Cruise	-	-	-	76	83	81	-	-	-
Highway	-	-	-	<1	-	-	72	69	76
Ferry	-	-	-	-	-	<1	14	13	9

In-State Transportation

Respondents were asked about the modes of transportation used to travel between communities. Cruise ship was not included as a transportation mode, as this is an assumed mode among cruise visitors.

- The most common modes of transportation were tour bus or van (15 percent), rental vehicle (14 percent), and Alaska Railroad (14 percent).
- Usage of both tour bus or van and Alaska Railroad decreased significantly between 2011 and 2016, from 25 to 15 percent, and from 22 to 14 percent, respectively. Some of this decrease can be attributed to the decrease in cross-gulf ship itineraries, relative to round-trip itineraries, in the cruise market. A change in wording in both of these categories may also have played a role.
    - Alaska Railroad was previously called "train" but was changed at the client's request. It is possible that in previous surveys, some respondents included the White Pass/Yukon Route train in this definition.
    - The term "motorcoach/bus" was changed to "tour bus or van," at the client's request, to include smaller tour vehicles.
- Other shifts between 2006 and 2011 were within 1 or 2 percentage points: from 15 to 14 percent for rental vehicle, from 11 to 9 percent for personal vehicle, and from 3 to 2 percent for state ferry. Shifts by transportation market are discussed in more detail on the following page.

CHART 4.8 - Transportation Used Between Communities, All Visitors, 2006, 2011, and 2016



Transportation Market

Not surprisingly, in-state transportation modes differed significantly by transportation market.

- One-third of air visitors (33 percent) used rental vehicles, consistent with 2011 (33 percent) and 2006 (34 percent).
- One-fifth (21 percent) of air visitors used airplanes to travel around the state, consistent with 2011 (20 percent), and slightly lower than 2006 (25 percent).
- Usage of personal vehicles among air visitors fell from 25 percent in 2011 to 20 percent in 2016. This may reflect the slight decrease in the VFR market (from 35 to 31 percent).
- Cruise passengers most commonly used two transportation modes in-state: Alaska Railroad (18 percent), and tour bus/van (21 percent). Both of these rates decreased significantly from 2011 (from 31 to 18 percent, and from 38 to 21 percent, respectively).
- Highway/ferry visitors most commonly used personal vehicle and state ferry to travel within the state. Personal vehicle rates increased over both generations, from 30 percent in 2006 to 34 percent in 2011 to 38 percent in 2016. State ferry usage rates fell from 26 percent in 2011 to 15 percent in 2016. Both of these shifts reflect known traffic patterns, discussed in *Section 3: Visitor Volume*.
- Three related profiles are provided in the *Section 9.* This section includes a profile of fly/drive visitors (those who fly in and out of the state, and use a rental vehicle/RV); a profile of highway visitors (visitors who entered or exited the state via highway); and a profile of ferry visitors (visitors who used the ferry at any point on their trip).

TABLE 4.8 - Transportation Used Between Communities, By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Rental vehicle	34	33	33	4	4	2	9	8	5
Air	25	20	21	5	4	2	8	5	3
Personal vehicle	22	25	20	<1	1	<1	30	34	38
Alaska Railroad*	9	9	9	25	31	18	5	5	3
Tour bus or van*	9	7	7	38	38	21	2	4	3
Rental RV	4	4	5	<1	<1	<1	5	4	4
State ferry	4	4	3	1	1	<1	25	26	15
Personal RV	1	1	1	<1	<1	<1	26	20	20
Don't know/refused	<1	<1	<1	1	1	<1	7	<1	2

Note: Cruise ship was not included in this question because it is an assumed mode of travel for all cruise visitors.
*"Tour bus/van" was previously called "motorcoach/bus" in AVSP 5 and 6. "Alaska Railroad" was previously called "train."

Vehicle Type

Visitors who reported entering and/or exiting the state via highway were asked what type of vehicle they were using.

- Over half of highway entries/exits were by car/truck/van, a rate that has steadily increased over time: from 46 percent of entries and exits in 2006, to 52/51 percent of entries/exits in 2011, to 57/61 percent in 2016.
- Entries/exits by RV/camper have experienced a corresponding decrease: from 47/48 percent (entries/exits) in 2006, to 41/44 percent in 2011, to 35/32 percent in 2016.
- Motorcycle entries/exits represent a very small fraction of the highway market, and have stayed consistent over time. Other types of vehicles include bicycles and motorcoaches.

TABLE 4.9 – Type of Vehicle Used to Enter/Exit Alaska, By Transportation Market, 2006, 2011, and 2016 (%)
Base: Entered/Exited Alaska by Highway

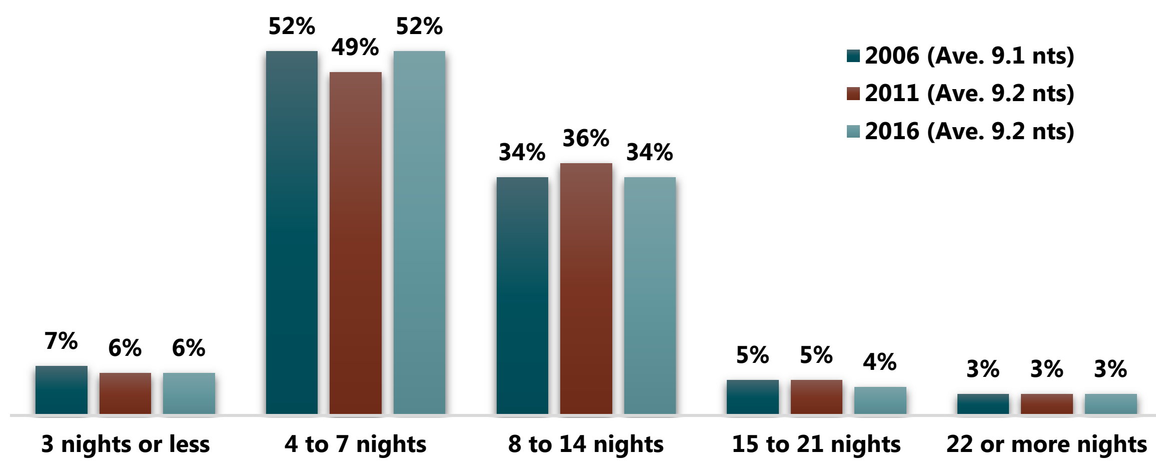
	ENTERED BY HWY			EXITED BY HWY		
	2006	2011	2016	2006	2011	2016
Car/truck/van	46	52	57	46	51	61
RV/camper	47	41	35	48	44	32
Motorcycle	3	4	3	4	4	3
Other	3	4	4	2	1	4

Length of Stay

Visitors were asked the number of nights they stayed in Alaska. Cruise visitors were asked to include their nights onboard their ship.

- Alaska visitors spent an average of 9.2 nights in Alaska in summer 2016. The most common time frame is four to seven nights, representing 52 percent of all visitors, followed by eight to 14 nights, representing 34 percent.
- The average length of stay in Alaska has changed little over the last decade, from 9.1 nights in 2006 to 9.2 nights in both 2011 and 2016. Percentages by time frame have stayed fairly consistent, as shown in the chart below.

CHART 4.10 - Length of Stay in Alaska
All Visitors, 2006, 2011, and 2016



Transportation Market

- Highway/ferry visitors report the longest trips, at 12.0 nights. The average trip length decreased in the last two AVSPs: from 18.8 nights in 2006, to 13.2 nights in 2011, to 12.0 nights in 2016.
- Air visitors report the next-longest stays at 10.0 nights. Average stays among air visitors has risen from 9.4 nights in 2006, to 9.8 nights in 2011, to 10.0 nights in 2016.
- Cruise visitors spent an average of 8.4 nights in Alaska, including all nights onboard. This average fell very slightly from 2011 (8.5 nights). The percentage staying 4 to 7 nights increased (from 57 to 62 percent), while the percentage staying 8 to 14 nights decreased (from 38 to 35 percent). These shifts correspond with the slight increase in round-trip itineraries relative to cross-gulf itineraries.

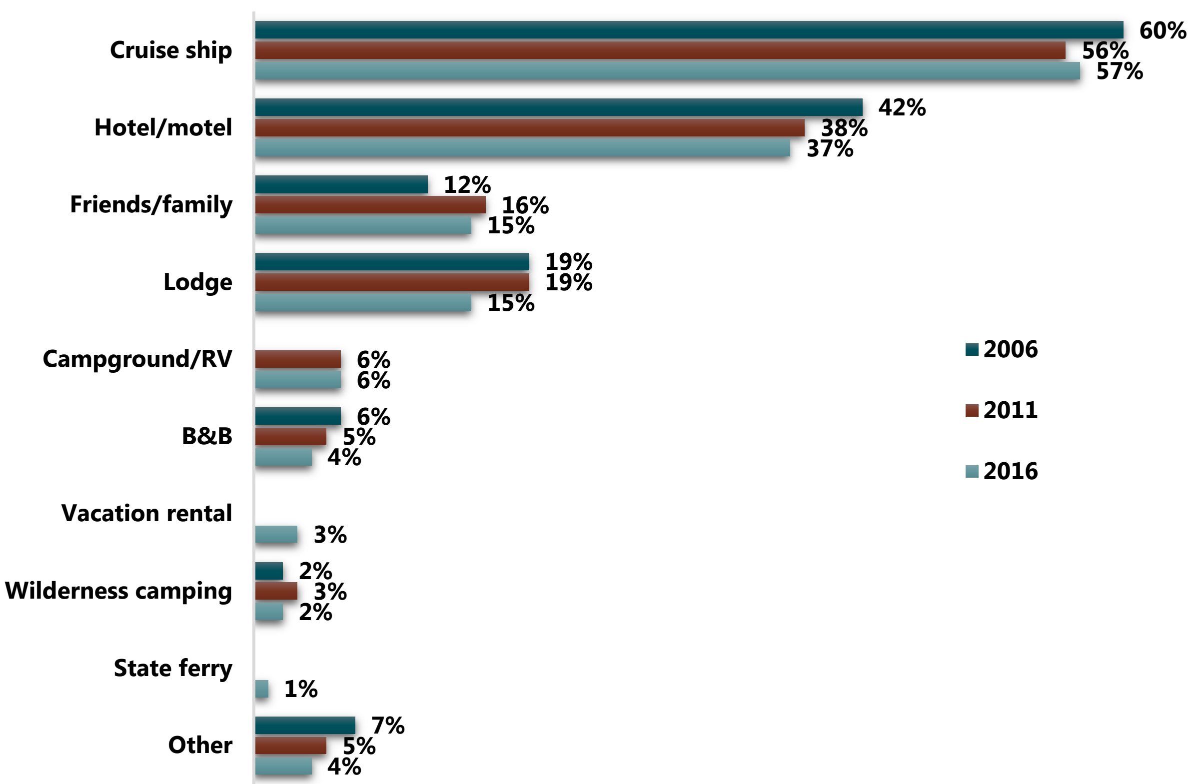
TABLE 4.10 - Length of Stay in Alaska
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
3 nights or less	11	10	11	4	2	1	19	29	33
4 to 7 nights	38	41	42	61	57	62	18	18	17
8 to 14 nights	38	35	34	32	38	35	23	26	23
15 to 21 nights	8	8	8	2	2	2	14	11	10
22 or more nights	4	6	6	<1	<1	<1	26	16	16
Average number of nights	**9.4**	**9.8**	**10.0**	**8.1**	**8.5**	**8.4**	**18.8**	**13.2**	**12.0**

Visitors were asked to record the type of lodging they stayed in for every night they spent in Alaska. This question had two changes in 2016. The category previously called "private home" was changed to "friends/family" to allow differentiation from vacation rentals, a new category in 2016. This analysis assumes that "private home" and "friends/family" are generally comparable. Also, state ferry was coded as a form of lodging in 2016 for the first time.

- Cruise ship was the most common form of lodging (57 percent), followed by hotel/motel (37 percent), friends/family (15 percent), and lodge (15 percent). The new category of vacation rental was used by 3 percent of the market.
- Usage rates for the overall market were fairly consistent with 2011 rates. All changes were within 1 percent, with one exception: lodge usage fell from 19 to 15 percent, in part attributable to the cruise market (see following page).

CHART 4.11 Lodging Types Used
All Visitors, 2006, 2011, and 2016



Notes: Other lodging types include youth hostel, boat/yacht, and others.
Private home was changed to friends/family in 2016; vacation rental and state ferry were added as new categories.

Transportation Market

The following table shows the percentage of visitors using each lodging type, by market.

- Air visitors were most likely to use hotels/motels at 55 percent, the same percentage as in 2011. Just over one-third (35 percent) stayed with friends/family, similar to the percentage of air visitors saying their trip purpose was to visit friends/relatives (31 percent).
- Air visitors staying with friends/family fell slightly, from 39 percent in 2011 (when the category was "private home") to 35 percent in 2016. Vacation rentals, a new category in 2016, were used by 7 percent of the air market.
- Besides cruise ships, cruise passengers most commonly used hotels/motels (25 percent) and lodges (12 percent). Both of these rates fell between 2011 and 2016, reflecting the lower percentage of cross-gulf passengers relative to round-trip passengers in 2016.
- Highway/ferry passengers were most likely to use campgrounds/RVs (46 percent), hotels/motels (31 percent), and friends/family (24 percent). Compared to 2011, usage of hotels/motels dropped in this market (from 38 to 31 percent), while usage of friends/family increased (from 19 to 24 percent). Usage of B&Bs dropped in each of the last two surveys: from 10 percent in 2006, to 8 percent in 2011, to 6 percent in 2016.

TABLE 4.11 Lodging Types Used
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Hotel/motel	62	55	55	32	28	25	37	38	31
Friends/family*	31	39	35	1	1	<1	22	19	24
Lodge	21	21	20	19	19	12	8	9	6
B&B	14	9	9	1	2	1	10	8	6
Campground/RV	n/a	9	9	n/a	<1	<1	n/a	48	46
Vacation rental*	n/a	n/a	7	n/a	n/a	<1	n/a	n/a	3
Wilderness camping	4	6	5	<1	<1	<1	11	14	12
Cruise ship	-	-	-	100	100	100	-	-	-
State ferry	n/a	n/a	<1	n/a	n/a	<1	n/a	n/a	13
Other[1]	12	11	8	3	2	<1	13	10	9

[1] Other lodging types include youth hostel, boat/yacht, and others.
* Private home was changed to friends/family in 2016; vacation rental and ferry were added as new categories.

AVSP 7 – Summer 2016

Section 5: Visitor Profile - Destinations and Activities

McDowell GROUP

Destinations

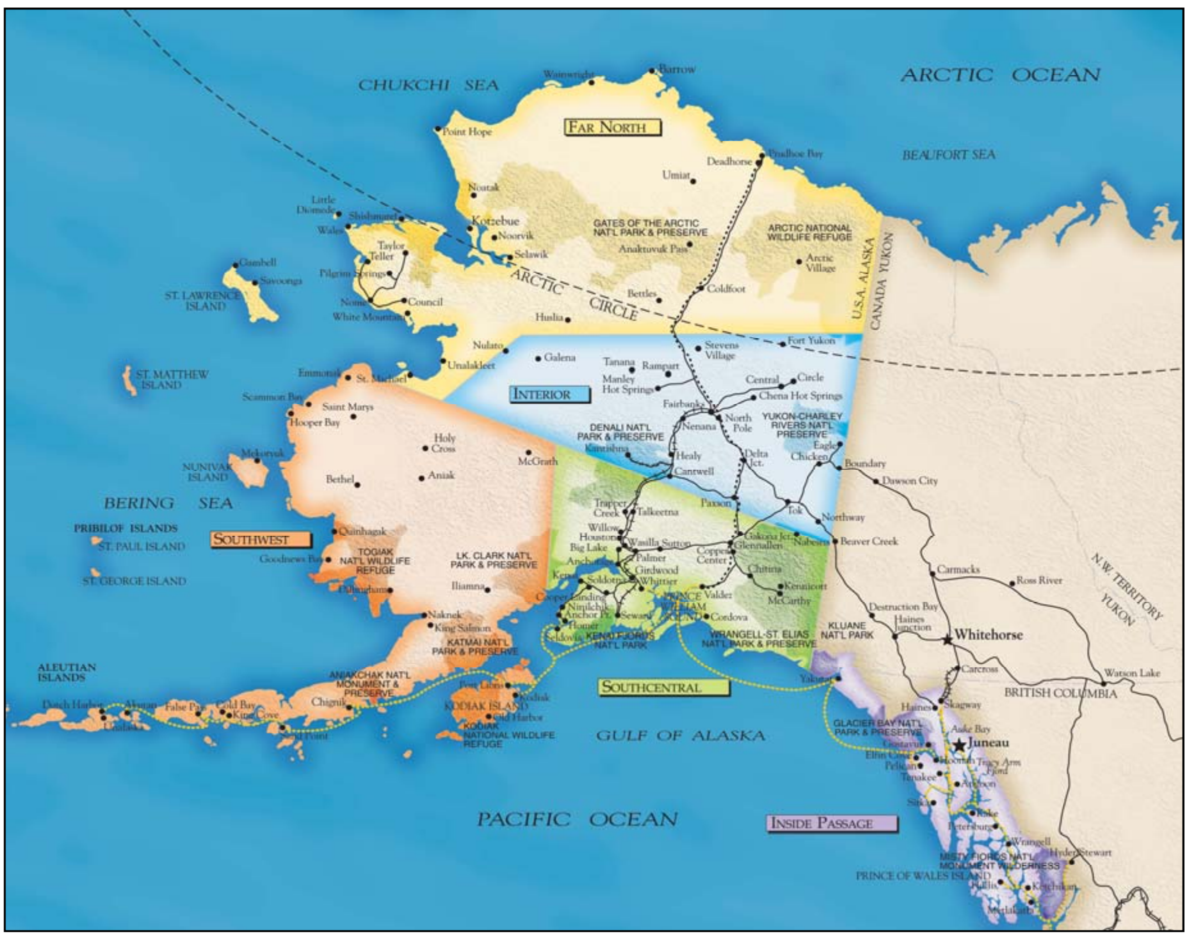
The following pages show the regions and communities visited by Alaska visitors, including overall visitation (day or overnight), overnight visitation, and the average number of nights spent in each location (based to those who overnighted in each location). The following map, also used in Alaska's statewide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

Survey results for visitors to specific regions and communities are provided in *Sections 11-14*.

There were several improvements to the way destination data was captured in AVSP 7:

- Nine locations were added to the survey instrument: Chicken, Coldfoot, Copper Center, Cordova, Delta Junction, Gustavus, Healy, Kotzebue, and Other Kenai Peninsula (which included Cooper Landing, Hope, Ninilchik, Sterling, and any other Kenai Peninsula communities). These additions were based on results from the 2011 survey. Additionally, a separate code was added in the data processing phase for "Other Mat-Su" due to the frequency of visitation.
- Over 150 locations that fell into the "other" category in 2006 and 2011 were captured in regional data, allowing for more precise regional visitation estimates.

Alaska Regional Map

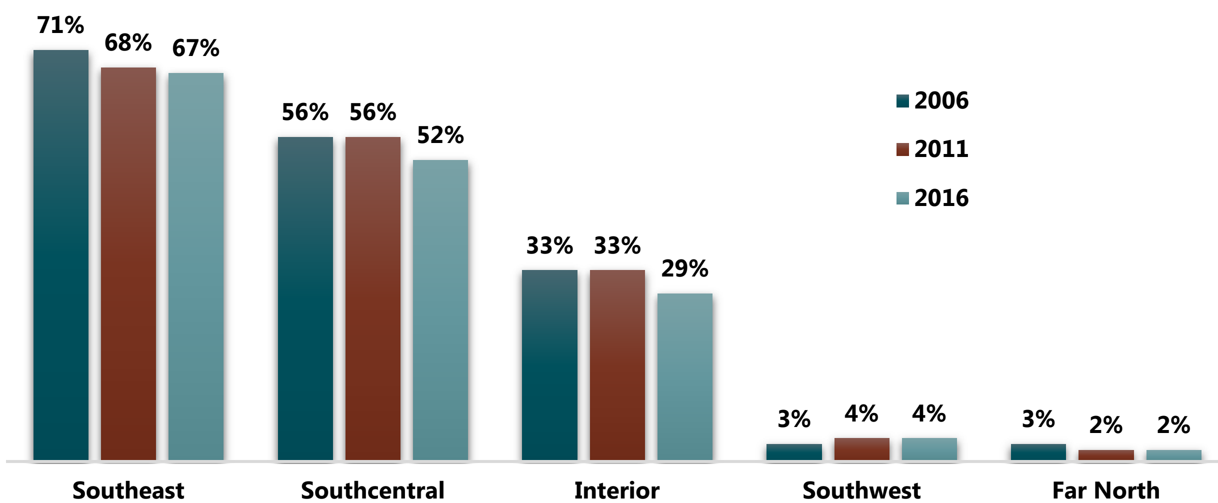


Regions Visited

The following charts shows regions visited, with day and overnight visits combined. Regional visitation rates by transportation market is provided along with community visitation in Table 5.1.

- Southeast is the most-visited region, capturing 67 percent of the market, followed by Southcentral (52 percent), Interior (29 percent), Southwest (4 percent), and Far North (2 percent).
- Regional visitation rates for the overall market have changed only slightly over the last decade.
    - Southeast's visitation rate dropped from 71 percent in 2006 to 68 percent in 2011, then to 67 percent in 2016.
    - Southcentral's visitation rate fell from 56 percent in 2006 and 2011 to 52 percent in 2016.
    - The Interior's visitation rate likewise fell, from 33 percent in 2006 and 2011 to 29 percent in 2016.
    - Southwest visitation stayed at 4 percent for both 2011 and 2016, while Far North visitation stayed at 2 percent.
- Changes by transportation market were more pronounced, and are discussed in the following section.

CHART 5.1 - Regions Visited (Day or Overnight)
All Visitors, 2006, 2011, and 2016



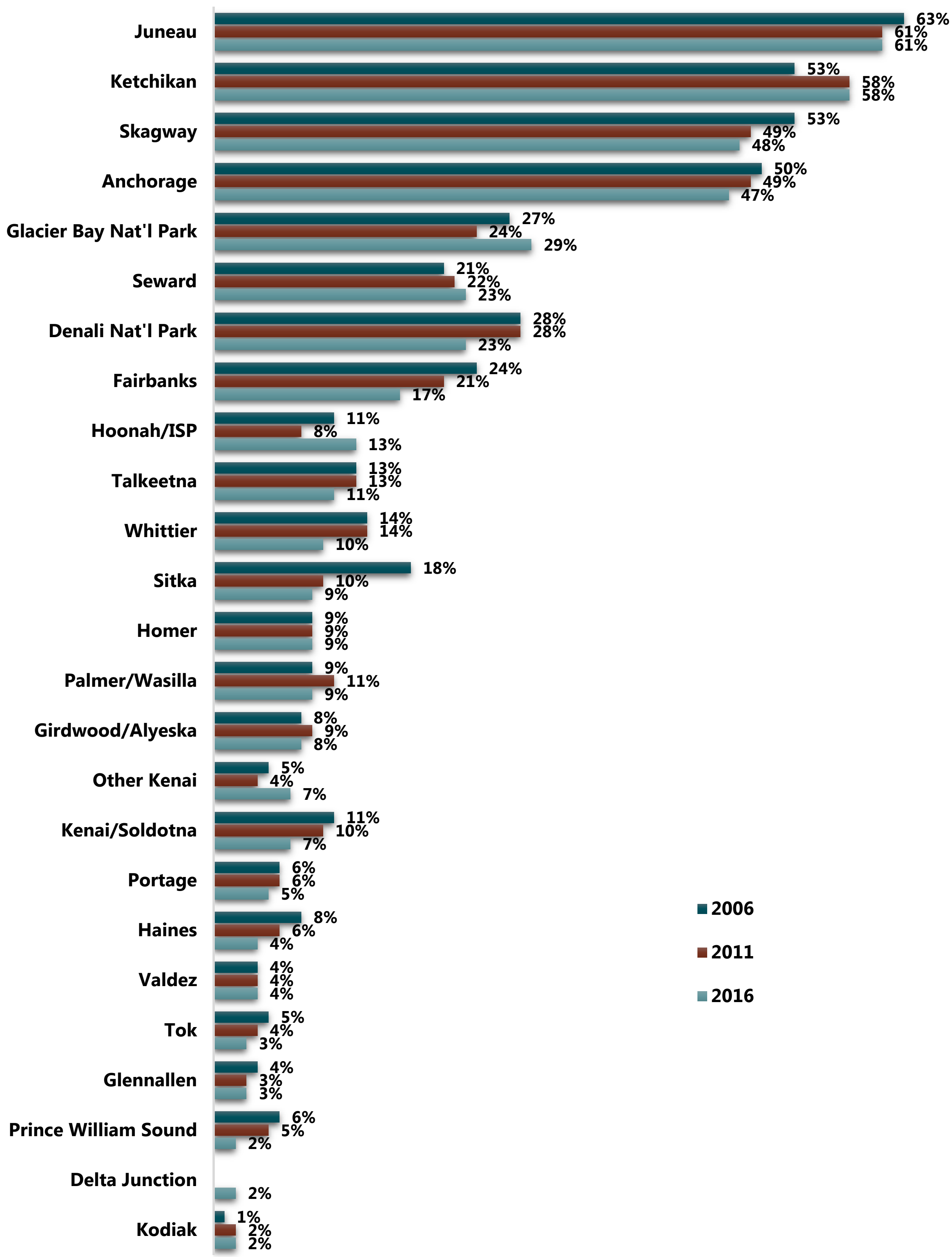
Destinations Visited

The chart on the following page shows the top 25 Alaska destinations visited, based to all visitors, with day and overnight visits combined.

- The top 10 destinations visited (day or overnight) in 2016 include: Juneau (61 percent), Ketchikan (58 percent), Skagway (48 percent), Anchorage (47 percent), Glacier Bay National Park (29 percent), Seward (23 percent), Denali National Park (23 percent), Fairbanks (17 percent), Hoonah/Icy Strait Point (13 percent), and Talkeetna (11 percent).
- Visitation rates changed between 2011 and 2016 for several communities. Changes of 3 percent or more occurred for the following communities.
    - Glacier Bay National Park increased from 24 to 29 percent.
    - Denali National Park fell from 28 to 23 percent.
    - Fairbanks fell from 21 to 17 percent.
    - Hoonah/Icy Strait Point increased from 8 to 13 percent.
    - Whittier fell from 14 to 10 percent.
    - Other Kenai increased from 4 to 7 percent.
    - Kenai/Soldotna fell from 10 to 7 percent.

  These changes are better understood in terms of transportation market, discussed on the following pages.
- Communities not included in the chart on the following page are: Healy (visited by 2 percent); Petersburg Gustavus, Coldfoot, Nome, Wrangell, Chicken, and Copper Center (each visited by 1 percent); and Nome, Cordova, and Kotzebue (each visited by less than 1 percent).
    - Overall visitation to each of the communities either was not measured in previous years, or did not change by more than 1 percent. These communities are included in the table showing results by transportation market.

CHART 5.2 – Top 25 Destinations Visited (Day or Overnight)
All Visitors, 2006, 2011, and 2016



Transportation Market

AIR VISITORS

- In terms of regions, air visitors were most likely to visit Southcentral at 78 percent, followed by Interior at 37 percent, Southeast at 19 percent, Southwest at 9 percent, and Far North at 3 percent.
- Southcentral visitation has remained fairly consistent in air visitation rates over the last decade, from 79 percent in 2006, to 80 percent in 2011, to 78 percent in 2016.
- Most Southcentral communities showed a small downturn in air visitation rates between 2011 and 2016. For example, the rate of air visitors traveling to the Kenai Peninsula went from 45 to 44 percent; and Palmer/Wasilla went from 21 to 19 percent. (Visitor volume estimates will reflect community visitation rates and growth in the overall air market.)
  - The more dramatic decrease for Kenai/Soldotna (from 22 to 15 percent) is at least in part attributable to the addition of the "other Kenai Peninsula" code on the survey in 2016. Those visiting "Other Kenai" destinations increased from 9 to 15 percent.
  - The large downturn in the percentage of people visiting "other Southcentral" (from 19 to 5 percent) is largely attributable to the increase in the number of coded destinations: Other Kenai Peninsula, Other Mat-Su, and Cordova.
- Southeast visitation dropped slightly from 20 to 19 percent.
  - However, Juneau visitation increased from 8 to 10 percent. Contributing to growth is Delta Air's recent reinstatement of service in the region.
  - Glacier Bay National Park decreased from 5 to 2 percent. This drop is likely in part attributable to the addition of "Gustavus" to the survey; Gustavus drew 2 percent of all air visitors.
- Interior visitation by air visitors was fairly consistent at 37 percent 2006, 36 percent in 2011, and 37 percent in 2016.
  - Likewise, visitation to Denali National Park was steady at 26 percent in 2006, 25 percent in 2011, and 26 percent in 2016. Fairbanks visitation showed only small changes, from 22 percent in 2006, to 20 percent in 2011, to 21 percent in 2016.
  - Healy, Delta Junction, Copper Center, and Chicken were new destinations coded in 2016, capturing 4 percent, 3 percent, 2 percent, and 1 percent of the air market, respectively. These added codes help explain the decrease in "Other Interior" visitation, from 7 percent in 2011 to 3 percent in 2016.
- Southwest visitation by air visitors increased from 7 percent in 2011 to 9 percent in 2016.
- Far North visitation remained at 3 percent. Nome visitation remained at 1 percent. New (coded) communities Coldfoot and Kotzebue captured 1 percent and <1 percent of the air market, respectively.

CRUISE MARKET

- Cruise visitors were most likely to visit Southeast (100 percent), followed by Southcentral (34 percent), and Interior (21 percent). Just 1 percent visited Southwest and less than 1 percent visited the Far North.

- Cruise visitation to ports closely reflected CLAA data. For example, 99 percent of cruise passengers reported visiting Juneau, compared to 99 percent of CLAA passengers. Other port comparisons include: Skagway at 81 percent AVSP vs. 80 percent CLAA; Glacier Bay at 48 percent for both sources; Seward at 18 percent AVSP vs. 17 percent CLAA, and Sitka at 13 percent AVSP vs. 12 percent CLAA.
    - A larger difference is apparent for Icy Strait Point: 22 percent of passengers reported visiting, versus 16 percent in CLAA data. Passengers may be reporting transiting Icy Strait via cruise ships and tour vessels, as it is a popular site for whale watching.
    - Ketchikan was slightly overreported at 97 percent, compared to 92 percent in CLAA data, partially attributable to Ketchikan being the survey site for nearly all visitors exiting Alaska via cruise ship.
    - Whittier was underreported at 8 percent, compared to 13 percent in CLAA data. Some passengers who embarked or disembarked their ship may not have been aware of the community name or spent too little time in port to consider it a "visited" destination.
- Cruise passenger visitation to Southeast communities has shifted somewhat over the last decade, reflecting ship itinerary changes. Most changes were within 1 to 3 percent.
    - The increase in Glacier Bay visitation (from 37 to 49 percent) is due to visitation being underreported in the 2011 survey from a narrow interpretation of "visitation" by some field staff. Consistent training and fielding in 2016 resulted in AVSP 7 data corresponding with CLAA data.
- Cruise passenger visitation to the Interior dropped from 30 to 21 percent between 2011 and 2016, reflecting lower visitation to Denali (from 29 to 20 percent) and Fairbanks (from 21 to 12 percent). There are several factors influencing this decline.
    - Fewer cross-gulf itineraries in relation to round-trip itineraries limits opportunities for land tours or traveling to the Interior independently.
    - Cruise lines have introduced more variety in land tour itineraries, including some packages that do not include Fairbanks.
- Cruise passenger visitation to Southwest shifted from 2 percent in 2011 to 1 percent in 2016, while Far North visitation fell very slightly from 1 percent to less than 1 percent.

HIGHWAY/FERRY MARKET

- Highway/ferry visitors were most likely to visit Interior (67 percent), followed by Southcentral (56 percent), and Southeast (49 percent). Six percent visited the Far North, and 1 percent visited Southwest.
- Highway/ferry visitors showed more dramatic changes than the other two transportation markets, with most of the change attributable to the downturn in the ferry market, and upturn in the highway market.
    - Southeast visitation fell from 62 and 63 percent in 2006 and 2011 to 49 percent in 2016. Visitation to various communities in Southeast fell similarly between 2011 and 2016: from 41 to 30 percent in Skagway; from 19 to 9 percent in Juneau; and from 17 to 10 percent in Ketchikan.
    - Interior visitation by highway/ferry visitors increased from 58 to 67 percent.

TABLE 5.2 - Destinations Visited (Day or Overnight) By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Southcentral	**79**	**80**	**78**	**42**	**41**	**34**	**69**	**53**	**56**
Anchorage	73	74	74	37	35	29	59	41	46
Kenai Peninsula	45	45	44	15	19	20	48	36	37
Seward	32	31	31	14	17	18	37	27	25
Kenai/Soldotna	22	22	15	3	2	<1	29	20	12
Homer	20	18	17	2	3	2	33	23	22
Other Kenai Peninsula*	11	9	15	1	<1	1	12	12	17
Palmer/Wasilla	18	21	19	1	3	1	35	23	24
Girdwood/Alyeska	18	19	17	3	3	2	13	8	10
Talkeetna	15	15	16	11	12	8	17	10	15
Whittier	14	13	13	14	16	8	18	13	8
Portage	13	12	11	2	2	1	11	8	7
Valdez	7	6	7	1	1	1	29	18	19
Prince William Sound	7	6	4	6	4	1	12	3	1
Other Mat-Su*	n/a	n/a	2	n/a	n/a	<1	n/a	n/a	3
Cordova*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	<1
Other Southcentral	7	19	5	3	2	1	8	17	8
Southeast	**21**	**20**	**19**	**99**	**99**	**100**	**62**	**63**	**49**
Juneau	9	8	10	96	97	99	21	19	9
Ketchikan	7	5	6	81	93	97	19	17	10
Sitka	6	4	4	25	15	13	9	5	3
Glacier Bay National Park	4	5	2	40	37	49	9	3	2
Prince of Wales Island	2	2	2	<1	<1	<1	2	2	2
Gustavus*	n/a	n/a	2	n/a	n/a	<1	n/a	n/a	2
Skagway	2	2	1	81	79	81	40	41	30
Petersburg	2	1	1	1	<1	<1	10	4	3
Haines	1	1	1	9	8	5	27	24	20
Hoonah/Icy Strait Point	1	<1	<1	17	14	22	2	1	1
Wrangell	2	1	1	1	1	<1	10	5	2
Other Southeast	3	2	2	8	3	<1	3	2	2
Interior	**37**	**36**	**37**	**27**	**30**	**21**	**71**	**58**	**67**
Denali National Park	26	25	26	27	29	20	46	31	31
Fairbanks	22	20	21	22	21	12	50	34	38
Glennallen	7	6	4	<1	<1	<1	31	19	20
Healy*	n/a	n/a	4	n/a	n/a	<1	n/a	n/a	8
Delta Junction*	n/a	n/a	3	n/a	n/a	<1	n/a	n/a	15
Copper Center*	n/a	n/a	2	n/a	n/a	1	n/a	n/a	4
Tok	2	2	1	2	3	<1	56	44	47
Chicken*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	15
Other Interior	6	7	3	1	1	<1	21	18	9
Southwest	**8**	**7**	**9**	**1**	**2**	**1**	**2**	**3**	**1**
Kodiak	3	3	4	<1	1	1	<1	1	1
Other Southwest	6	4	6	<1	<1	<1	2	2	1
Far North	**5**	**3**	**3**	**1**	**1**	**<1**	**7**	**5**	**6**
Coldfoot*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	5
Nome	1	1	1	<1	<1	<1	1	-	-
Kotzebue*	n/a	n/a	<1	n/a	n/a	<1	n/a	n/a	-
Other Far North	4	3	2	1	1	<1	6	5	3

*Visitation to these additional locations was captured in 2016.

Overnight Destinations

The following charts and table show where visitors overnighted. The major factor affecting overnight versus overall visitation is the cruise market: cruise passengers rarely overnight in port communities, leading to big differences between overall and overnight visitation for that market – and consequently, for the overall market.

- While Southeast was the most commonly visited region in terms of overall visitation (67 percent), only 10 percent of visitors overnighted there. Other regions' rates of overall and overnight visitation are much closer.
    - Southcentral has an overall rate of visitation of 52 percent, and an overnight visitation rate of 44 percent.
    - Interior has an overall rate of 29 percent, compared to 27 percent overnighting.
    - Southwest's overall rate of 4 percent is higher than the overnight rate of 3 percent. The difference is likely attributable to cruise ship calls at Kodiak and Dutch Harbor, and day tours out of the Southcentral region featuring flightseeing and bear viewing.
    - The Far North's overnight visitation rate of 1 percent is lower than their overall rate of 2 percent, likely related to day tours to the Arctic Circle, often operated out of the Interior region.
- The chart on the following page shows overnight destination rates, for communities with a visitation rate of more than 1 percent. Communities with overnight rates of 1 percent or less are included in the Transportation Market table.
- Differences in overnight visitation over the last decade are linked to overall visitation, discussed previously.

CHART 5.3 – Regions Visited, Overnight
All Visitors, 2006, 2011, and 2016

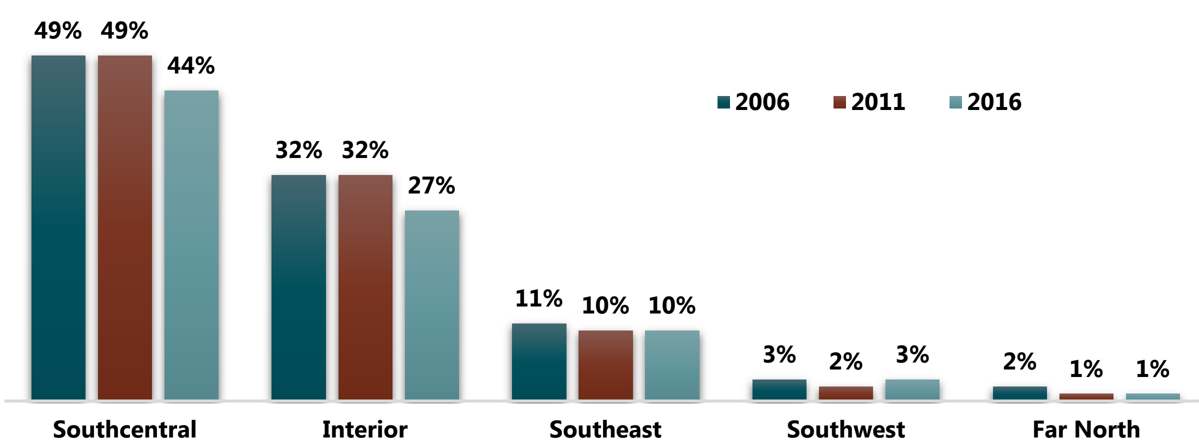
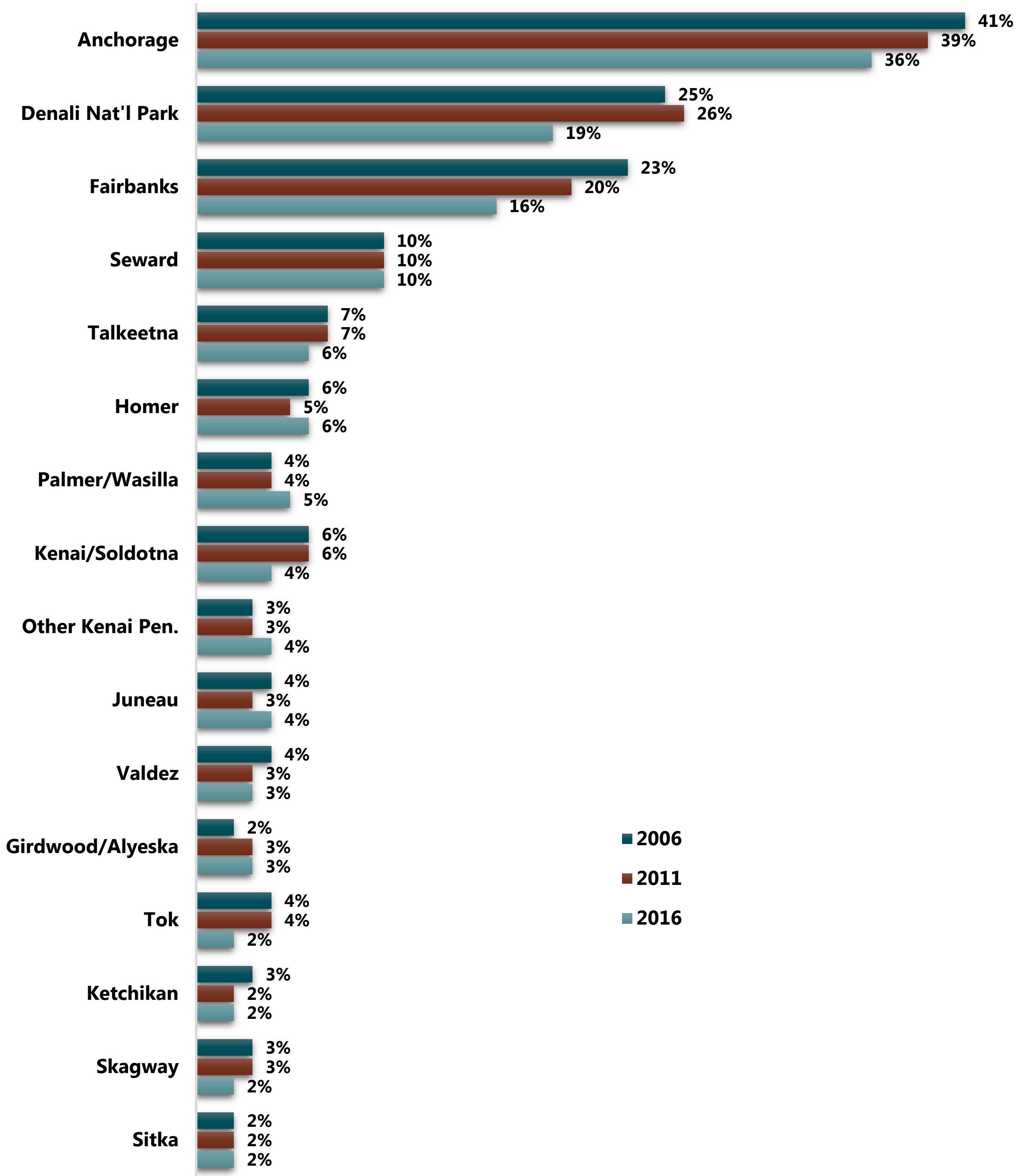


CHART 5.4 – Top Overnight Destinations
All Visitors, 2006, 2011, and 2016



Note: Excludes communities with overnight visitation rates of 1 percent or less. These are included in the table on the following page.

TABLE 5.4 - Overnight Destinations
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Southcentral	**76**	**77**	**74**	**32**	**30**	**23**	**73**	**55**	**54**
Anchorage	62	61	59	28	26	21	57	39	36
Kenai Peninsula	36	35	35	5	5	3	46	36	34
Seward	19	18	20	4	4	3	28	22	19
Kenai/Soldotna	13	13	8	1	<1	<1	26	16	9
Homer	13	11	12	1	<1	<1	23	17	17
Other Kenai Peninsula	7	5	9	<1	<1	<1	9	11	15
Palmer/Wasilla	7	8	9	<1	1	1	21	18	17
Talkeetna	7	6	8	7	5	5	9	7	10
Valdez	6	6	6	<1	<1	<1	28	17	17
Girdwood/Alyeska	4	5	6	2	1	1	3	3	3
Whittier	1	2	1	1	1	<1	5	4	3
Other Mat-Su*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	2
Portage	1	1	1	<1	<1	<1	4	4	5
Cordova*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	<1
Prince William Sound	1	1	1	1	<1	-	3	1	1
Other Southcentral	5	13	5	<1	1	1	7	16	6
Interior	**32**	**32**	**33**	**28**	**30**	**20**	**71**	**58**	**61**
Fairbanks	20	18	19	23	21	12	49	32	35
Denali National Park	20	19	18	27	30	20	41	28	25
Healy*	n/a	n/a	3	n/a	n/a	<1	n/a	n/a	4
Glennallen	3	2	1	<1	<1	<1	18	14	11
Copper Center*	n/a	n/a	1	n/a	n/a	1	n/a	n/a	3
Tok	1	2	1	2	2	<1	44	39	36
Delta Junction*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	7
Chicken*	n/a	n/a	<1	n/a	n/a	-	n/a	n/a	7
Other Interior	3	5	1	<1	<1	<1	15	12	6
Southeast	**19**	**17**	**18**	**3**	**2**	**2**	**50**	**56**	**37**
Juneau	7	7	8	2	<1	1	15	14	6
Skagway	1	1	1	2	1	1	26	34	20
Ketchikan	6	4	4	1	<1	1	7	8	6
Sitka	5	4	4	<1	<1	<1	4	4	2
Haines	1	1	1	<1	-	<1	20	20	16
Prince of Wales Island	2	2	2	<1	-	-	2	2	2
Gustavus*	n/a	n/a	1	n/a	n/a	<1	n/a	n/a	1
Petersburg	1	1	1	<1	<1	<1	3	2	1
Glacier Bay National Park	2	1	1	-	<1	<1	2	1	1
Wrangell	1	1	1	-	<1	-	3	1	1
Hoonah/Icy Strait Point	<1	<1	<1	-	<1	-	1	<1	<1
Other Southeast	2	2	1	<1	<1	-	2	1	1
Southwest	**7**	**6**	**9**	**<1**	**<1**	**<1**	**2**	**2**	**1**
Kodiak	3	3	3	<1	<1	<1	<1	1	1
Other Southwest	5	3	6	<1	<1	<1	2	1	<1
Far North	**4**	**3**	**2**	**<1**	**1**	**<1**	**4**	**3**	**4**
Nome	1	<1	<1	<1	<1	<1	<1	-	-
Coldfoot*	n/a	n/a	<1	n/a	n/a	<1	n/a	n/a	3
Kotzebue*	n/a	n/a	<1	n/a	n/a	<1	n/a	n/a	-
Other Far North	3	2	2	<1	1	-	4	3	3

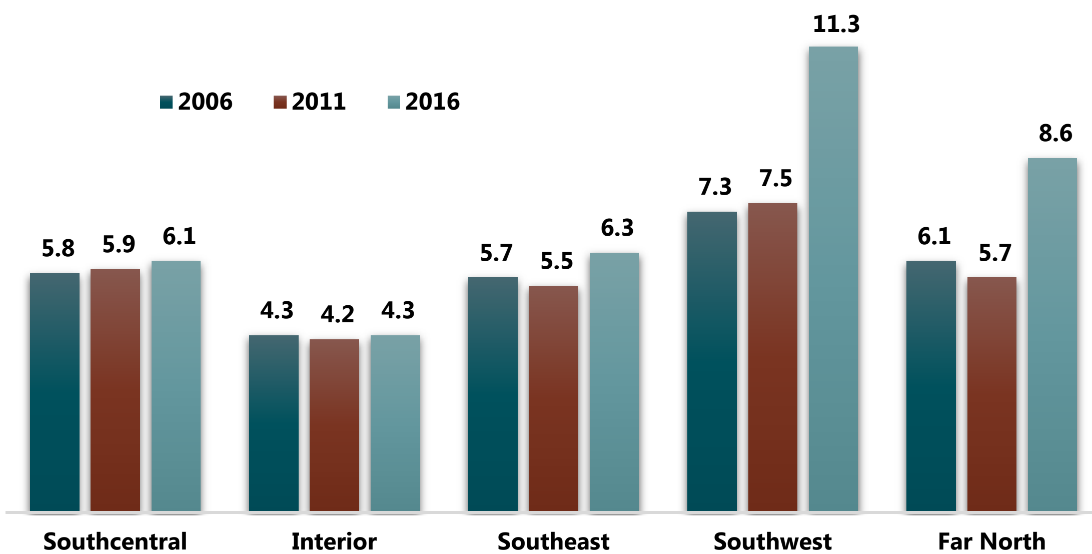
*Visitation to these additional locations was captured in 2016.

Length of Stay by Location

The chart below shows the average number of nights stayed in each region, based on those who overnighted in each location. For example, air visitors who spent at least one night in Southcentral reported spending an average of 7.4 nights in the region. The table on the following page shows average number of nights for each destination, by transportation market. Communities not included in the table did meet the minimum sample size of 50 for any of the three transportation markets.

- The more remote regions of Southwest and Far North showed the highest average number of nights at 11.3 and 8.6 nights, respectively. (The smaller samples of these regions make results more variable from year to year.) They were followed by Southeast (6.3 nights), Southcentral (6.1 nights), and Interior (4.3 nights).
- Average length of stay increased in each region between 2011 and 2016. The larger increases occurred in Southwest (from 7.5 to 11.3 nights) and Far North (from 5.7 to 8.6 nights).

CHART 5.5 - Average Number of Nights By Region, All Visitors, 2006, 2011, and 2016
(Base: Those who overnighted in each region)



Transportation Market

- By region, air visitors reported longer average length of stay for Southwest (11.5 nights) and Far North (10.5 nights) when compared to other regions (7.4 nights in Southcentral, 7.4 nights in Southeast, and 5.2 nights in the Interior.
- Between 2011 and 2016, air visitors' average length of stay dropped slightly in the Interior (from 5.5 to 5.2 nights), while increasing for Southeast (from 6.2 to 7.4 nights), Southwest (from 7.8 to 11.5 nights), and Far North (from 6.7 to 10.5 nights). The average for Southcentral was about the same (7.6 and 7.4 nights).

- Cruise visitors' average length of stay was slightly higher for the Interior at 3.1 nights, compared to 2.1 nights in Southcentral and 2.4 nights in Southeast. (The cruise passengers who overnighted in Southeast were most likely to be small-ship passengers, or on land tours starting or ending in Skagway.)
- Cruise visitors' average length of stay in Southcentral changed little, from 2.2 nights in 2006 and 2011 to 2.1 nights in 2016. The Interior average dropped from 3.3 to 3.1 between 2011 and 2016, while the Southeast average increased from 1.7 to 2.2.
- Highway/ferry visitors spent much more time in Southcentral (average of 11.7 nights) in comparison with the Interior (5.3 nights) and Southeast (5.1 nights). Between 2011 and 2016, the average for Southcentral dropped slightly, from 12.1 to 11.7 nights; it also dropped slightly for Southeast (from 5.3 to 5.1 nights). Interior increased from 5.1 to 5.3 nights.

TABLE 5.5 - Average Number of Nights By Transportation Market, 2006, 2011, and 2016 (Base: Those who overnighted in each destination)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Southcentral	**7.4**	**7.6**	**7.4**	**2.2**	**2.2**	**2.1**	**14.6**	**12.1**	**11.7**
Anchorage	4.3	4.5	4.3	1.6	1.6	1.5	5.6	4.3	3.8
Kenai Peninsula	5.1	6.0	4.8	2.3	2.3	1.8	10.5	6.7	8.8
Seward	2.2	2.3	2.3	1.6	1.5	1.4	4.0	3.2	3.2
Homer	3.2	3.2	3.2	*	*	*	4.2	2.9	*
Kenai/Soldotna	5.0	6.0	5.3	*	*	*	7.5	6.7	*
Other Kenai Peninsula	n/a	n/a	4.6	n/a	n/a	*	n/a	n/a	*
Talkeetna	2.1	2.2	2.1	1.1	1.3	1.3	*	*	*
Palmer/Wasilla	5.5	6.3	5.1	*	*	*	4.9	3.1	*
Valdez	2.7	2.6	2.7	*	*	*	3.8	4.3	*
Girdwood/Alyeska	2.2	2.5	2.3	*	1.4	*	*	*	*
Interior	**5.2**	**5.5**	**5.2**	**3.2**	**3.3**	**3.1**	**7.1**	**5.1**	**5.3**
Denali National Park	2.5	2.5	2.5	1.9	2.1	2.0	2.4	2.6	2.7
Fairbanks	4.2	5.4	4.9	1.7	1.7	1.8	5.5	3.6	3.1
Tok	1.9	2.8	*	*	1.0	*	1.7	1.5	1.7
Healy	n/a	n/a	3.2	n/a	n/a	*	n/a	n/a	*
Southeast	**6.2**	**6.2**	**7.4**	**4.1**	**1.7**	**2.4**	**5.3**	**5.3**	**5.1**
Juneau	4.0	4.4	5.0	2.1	1.7	*	3.1	3.3	*
Skagway	2.3	2.9	*	*	*	*	2.3	2.1	1.9
Ketchikan	4.2	4.0	6.4	*	*	*	5.2	4.5	*
Sitka	4.6	4.8	5.5	*	*	*	3.0	*	*
Southwest	**7.5**	**7.8**	**11.5**	*	*	*	*	*	*
Kodiak	7.1	8.3	10.8	*	*	*	*	*	*
Other Southwest	n/a	n/a	11.1	n/a	n/a	*	n/a	n/a	*
Far North	**7.1**	**6.7**	**10.5**	*	*	*	*	*	*

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

Activities

Visitors were shown a list of activities and asked which they participated in while in Alaska. A few changes were made to the survey instrument: hot springs was added as a new code; crab feed was added to the salmon bake activity; and visiting friends/family was removed, as that activity is adequately captured in the trip purpose question. The results to this question based to all visitors are presented in tabular (rather than chart) format due to the large number of activities, as well as multiple subgroupings

Results to this question were based only to intercept respondents, rather than combined online and intercept, as most other survey results are shown. Participation rates for certain activities differed somewhat between intercept and online respondents. These activities tended to be those that benefited from a surveyor's guidance, such as city/sightseeing tours. Previous AVSP results have likewise been modified from previous reports in order to ensure comparability of data.

- The most common activities were shopping (75 percent), wildlife viewing (45 percent), day cruises (39 percent), hiking/nature walk (34 percent), city/sightseeing tours (31 percent), museums (22 percent), and White Pass/Yukon Route train (22 percent).
- Participation rates decreased for some activities. The more pronounced decreases included the following:
    - Wildlife viewing fell from 56 percent in 2006, to 48 percent in 2011, to 45 percent in 2016.
    - City/sightseeing tours fell from 44 percent in 2006, to 35 percent in 2011, to 31 percent in 2016.
    - Gold panning/mine tour fell from 15 percent in 2006, to 12 percent in 2011, to 9 percent in 2016.
    - Fishing fell from 20 percent in 2006, to 19 percent in 2011, to 16 percent in 2016.
    - Birdwatching fell from 19 percent in 2006, to 11 percent in 2011, to 9 percent in 2016.
- There were a few increases in participation rates.
    - Shopping grew from 71 percent in 2006, to 72 percent in 2011, to 75 percent in 2016.
    - Day cruises grew from 36 percent in 2011 to 39 percent in 2016.
    - Hiking/nature walk grew from 28 percent in 2011 to 34 percent in 2016.
    - Dogsledding grew from 7 percent in 2006, to 8 percent in 2011, to 11 percent in 2016.
    - Tramway/gondola grew from 10 percent in 2011 to 13 percent in 2016.

Profiles of visitors who participated in guided fishing, unguided fishing, cultural activities, and Native cultural tours/activities are provided in Section 15.

TABLE 5.6 - Activity Participation
All Visitors, 2006, 2011, and 2016 (%)
Base: Intercept Respondents

	ALL VISITORS		
	2006	2011	2016
Shopping	71	72	75
Wildlife viewing	56	48	45
Birdwatching	19	11	9
Cultural activities	49	40	39
Museums	28	23	22
Historical/cultural attractions	18	15	15
Native cultural tours/ activities	20	11	12
Gold panning/mine tour	15	12	9
Day cruises	40	36	39
Hiking/nature walk	30	28	34
Train	38	36	32
White Pass/Yukon Route	27	25	22
Alaska Railroad	16	18	14
City/sightseeing tours	44	35	31
Fishing	20	19	16
Guided fishing	13	11	10
Unguided fishing	8	10	8
Flightseeing	15	15	13
Tramway/gondola	12	10	13
Dog sledding/kennel tour*	7	8	11
Shows/Alaska entertainment	10	8	10
Salmon bake/crab feed*	12	7	10
Business	8	7	7
Kayaking/canoeing	5	5	5
Camping	7	7	5
ATV/4-wheeling/ORV/Jeep*	n/a	4	5
Zipline	n/a	4	4
Rafting	5	5	3
Biking	3	3	3
Hot springs*	n/a	n/a	2
Northern Lights viewing	1	1	2
Hunting	1	1	1
Other	7	5	1

*Changes from the 2011 list of activities include the additional activity of hot springs; crab feed added to salmon bake; ORV and Jeep added to ATV/4-wheeling; and kennel tour added to dog sledding.

Transportation Market

Activity participation rates varied widely by transportation market.

- Air visitors were most likely to participate in shopping, wildlife viewing, hiking/nature walk, cultural activities, and fishing.
- Activity participation rates among air visitors have not changed very much over the last decade, although a few trends are notable:
    - Wildlife viewing grew from 53 percent in 2011 to 59 percent in 2016. Birdwatching (a component of wildlife viewing) increased from 11 to 14 percent).
    - Hiking/nature walk grew from 39 percent in 2011 to 46 percent in 2016.
    - Fishing participation dropped from 39 to 34 percent between 2011 and 2016, corresponding with a 4 percent drop in unguided fishing (from 23 to 19 percent).
- Cruise visitors were most likely to participate in shopping, train, day cruises, city/sightseeing tours, cultural activities, and wildlife viewing.
- Activity participation rates among cruise visitors changed in a number of categories:
    - Shopping grew from 77 percent in 2006, to 80 percent in 2011, to 85 percent in 2016.
    - Wildlife viewing rates dropped from 57 percent in 2006, to 46 percent in 2011, to 37 percent in 2016.
    - Hiking/nature walk rates grew from 20 percent in 2011 to 26 percent in 2016.
    - City/sightseeing tour participation dropped from 60 percent in 2006, to 48 percent in 2011, to 44 percent in 2016.
    - White Pass/Yukon Route railway participation dropped from 41 percent in 2011 to 36 percent in 2016.
    - Alaska Railroad participation dropped from 25 percent in 2011 to 17 percent in 2016.
    - Tramway/gondola participation increased from 13 percent in 2011 to 17 percent in 2016.
    - Gold panning/mine tour dropped from 16 percent in 2011 to 12 percent in 2016.
    - Shows/Alaska entertainment participation grew from 10 percent in 2011 to 14 percent in 2016.
    - Salmon bake/crab feed participation grew from 10 percent in 2011 to 14 percent in 2016. (The "crab feed" category was added in 2016.)
    - Dog sledding participation grew from 10 percent in 2011 to 14 percent in 2016.
- Highway/ferry visitors were mostly likely to participate in shopping, wildlife viewing, hiking/nature walk, cultural activities, fishing, and camping.
- Compared to the air and cruise markets, activity participation rates among highway/ferry visitors showed fewer changes.
    - The biggest change was in camping, which fell from 52 to 28 percent between 2011 and 2016.
    - The cultural activity rate fell from 51 percent in 2006, to 44 percent in 2011, to 36 percent in 2016.

TABLE 5.7 - Activity Participation
By Transportation Market, 2006, 2011, and 2016 (%)
Base: Intercept Respondents

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Shopping	61	61	59	77	80	85	60	64	63
Wildlife viewing	54	53	59	57	46	37	47	42	42
Birdwatching	20	11	14	18	6	6	14	11	12
Hiking/nature walk	38	39	46	25	20	26	38	34	37
Cultural activities	38	34	33	55	43	44	51	44	36
Museums	28	25	23	27	22	22	44	31	25
Historical/cultural attractions	14	13	12	21	15	17	15	19	15
Native cultural tours/ activities	11	8	7	26	13	16	8	10	4
Gold panning/mine tour	7	5	5	20	16	12	11	10	8
Fishing	38	39	34	8	6	4	36	26	29
Guided fishing	22	19	19	8	6	4	17	11	13
Unguided fishing	20	23	19	<1	1	<1	26	18	19
Day cruises	28	25	28	47	44	47	33	29	25
Business	23	19	18	<1	1	<1	5	5	2
City/sightseeing tours	18	15	13	60	48	44	25	13	15
Flightseeing	9	10	12	18	18	15	8	9	9
Train	10	10	9	56	54	48	11	10	9
Alaska Railroad	9	10	9	21	25	17	5	3	4
White Pass/Yukon Route	1	1	1	43	41	36	7	8	7
Camping	13	12	9	1	<1	<1	46	52	28
Dog sledding	5	5	8	9	10	14	2	2	3
Tramway/gondola	5	5	7	16	13	17	4	5	4
Kayaking/canoeing	4	6	6	5	4	5	3	4	3
ATV/4-wheeling	n/a	4	5	n/a	4	5	n/a	1	4
Biking	3	4	5	2	3	2	3	3	5
Rafting	5	4	4	5	6	3	2	3	2
Shows/Alaska entertainment	8	5	4	12	10	14	8	5	4
Salmon bake/crab feed*	5	4	4	17	10	14	7	3	4
Hot springs	n/a	n/a	4	n/a	n/a	<1	n/a	n/a	6
Northern Lights viewing	2	2	2	1	1	1	1	1	3
Hunting	1	2	2	-	<1	<1	1	1	-
Zipline	n/a	<1	1	n/a	7	6	n/a	1	1
Other	7	7	3	8	4	<1	1	7	1

*Changes from the 2011 list of activities include the additional activity of hot springs; crab feed added to salmon bake; ORV and Jeep added to ATV/4-wheeling; and kennel tour added to dog sledding.

AVSP 7 – Summer 2016

Section 6:
Visitor Profile -
Satisfaction, Repeat Travel, and Trip Planning

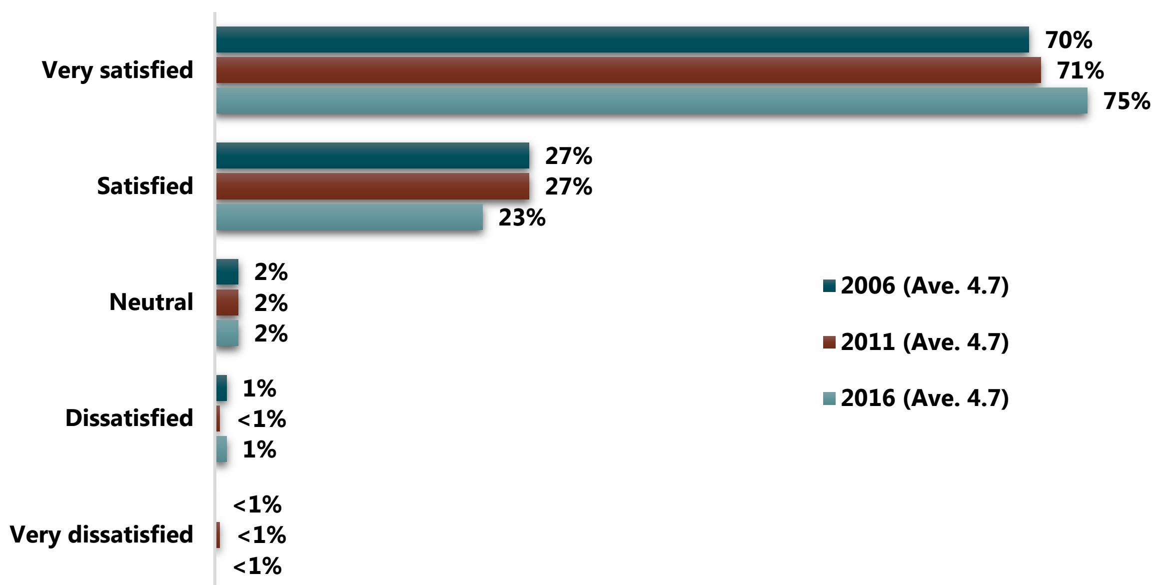
McDowell GROUP

Satisfaction with Overall Experience

Visitors were asked how satisfied they were with their overall Alaska experience. Satisfaction with specific trip elements, such as accommodations and transportation, was removed from the 2016 survey to allow room for new questions.

- Alaska visitors rate their overall trip satisfaction highly, with 75 percent very satisfied, 23 percent satisfied, and only 1 percent dissatisfied.
- Satisfaction ratings have increased slightly over the last decade, shifting from 70 percent very satisfied in 2006, to 71 percent in 2011, to 75 percent in 2016. Average satisfaction on a 1-to-5 scale has stayed consistent at 4.7.

CHART 6.1 - Satisfaction with Overall Alaska Experience
All Visitors, 2006, 2011, and 2016



Transportation Market

- Cruise passengers gave the highest overall satisfaction ratings at 76 percent very satisfied, followed by air visitors at 73 percent and highway/ferry visitors at 67 percent. Average ratings on a 1-to-5 scale are more comparable: 4.7 for both air and cruise visitors, and 4.6 for highway visitors.
- The percentage of very satisfied air visitors has increased gradually, from 68 percent in 2006, to 70 percent in 2011, to 73 percent in 2016.
- The very satisfied rating among cruise visitors increased from 72 percent in both 2006 and 2011 to 76 percent in 2016, while ratings among highway/ferry visitors increased from 64 percent in 2006 and 2011 to 67 percent in 2016.

TABLE 6.1 - Satisfaction with Overall Alaska Experience By Transportation Market, 2006, 2011, and 2016 (%)

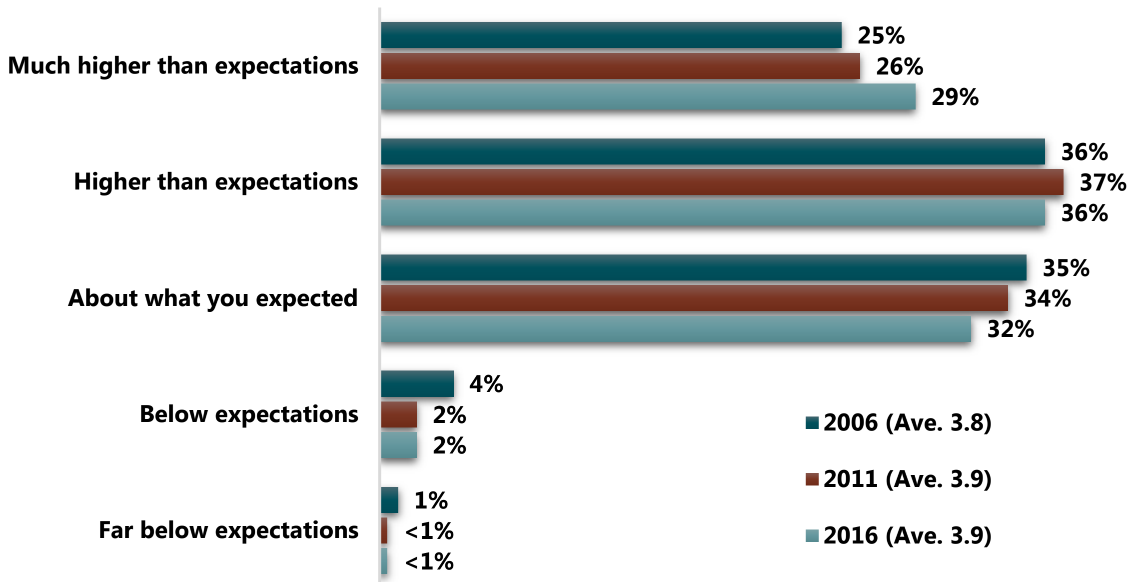
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
5 - Very satisfied	68	70	73	72	72	76	64	64	67
4 – Satisfied	30	28	25	25	25	21	31	34	29
3 - Neither/neutral	2	2	2	1	2	2	4	1	3
2 – Dissatisfied	1	<1	1	2	1	<1	<1	1	1
1 - Very dissatisfied	<1	<1	<1	<1	-	-	-	-	<1
Average 1-5	**4.6**	**4.7**	**4.7**	**4.7**	**4.7**	**4.7**	**4.6**	**4.6**	**4.6**

Compared to Expectations

Visitors were asked how their Alaska trip compared to their expectations. Business visitors were screened out of this question.

- Alaska consistently met or exceeded visitors' expectations, with 32 percent saying the trip was about what they expected, 36 percent saying the trip was higher than expectations, and 29 percent saying the trip was much higher than expectations. Just 2 percent said the trip fell below expectations.
- The compared-to-expectations rating has been improving gradually over the last decade, with the "much higher" rating increasing from 25 percent in 2006, to 26 percent in 2011, to 29 percent in 2016.

CHART 6.2 - Alaska Trip Compared to Expectations
All Visitors (Except Business Visitors), 2006, 2011, and 2016



Transportation Market

- Cruise passengers were slightly more likely to say their trip was much higher than expectations at 31 percent, followed by highway/ferry at 29 percent, and air at 27 percent.
- The percentage giving a "much higher than expectations" rating rose over the last decade among air visitors (from 21 percent in 2006, to 24 percent in 2011, to 27 percent in 2016) as well as among cruise visitors (from 27 to 28 to 31 percent). The rating among ferry visitors fluctuated more: from 28 to 20 to 29 percent.

TABLE 6.2 - Alaska Trip Compared to Expectations
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
5 - Much higher than expectations	21	24	27	27	28	31	28	20	29
4 - Higher than expectations	35	36	37	36	38	36	32	35	27
3 - About what you expected	40	38	34	32	31	31	36	42	39
2 - Below expectations	4	2	2	4	2	2	4	3	4
1 - Far below expectations	<1	<1	<1	1	<1	1	<1	<1	1
Average 1-5	**3.7**	**3.8**	**3.9**	**3.8**	**3.9**	**3.9**	**3.8**	**3.7**	**3.8**

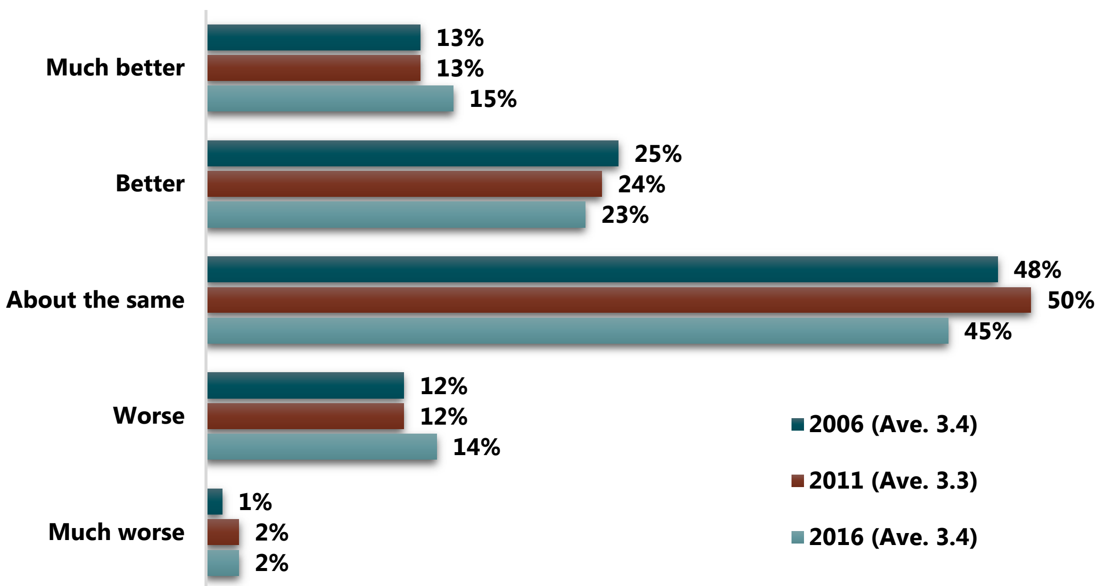
Note: Business visitors were screened out of this question.

Value for the Money

Visitors were asked how Alaska rated in terms of value for the money, compared to other vacation destinations visited in the past five years. Again, business visitors were screened out of this question.

- Visitors were most likely to rate Alaska's value for the money "about the same" (45 percent) when compared to other destinations. They were much more likely to rate Alaska better or much better (38 percent) than to rate it worse or much worse (16 percent).
- Value ratings have changed very little over the last decade, although there were very slight upticks in both the "worse" rating (from 12 to 14 percent), and the "much better" rating (from 13 to 15 percent).

CHART 6.3 - Value for the Money
Compared with other vacation destinations visited in the past five years
All Visitors (Except Business Visitors), 2006, 2011, and 2016



Transportation Market

- Cruise visitors were more likely to give better or much better ratings (43 percent) when compared with air visitors (33 percent) and ferry visitors (31 percent).
- Average value ratings on a 1-to-5 scale decreased slightly among air passengers (from 3.3 in 2006 and 2011 to 3.2 in 2016; increased slightly among cruise passengers (from 3.4 in 2006 and 2011 to 3.5 in 2016); and stayed the same among highway/ferry visitors (3.2 for both 2011 and 2016, down from 3.3 in 2006).

TABLE 6.3 - Value for the Money
Compared with other vacation destinations visited in the past five years
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
5 - Much better	13	12	13	13	13	17	13	10	12
4 - Better	22	24	20	27	24	26	22	23	19
3 - About the same	49	47	46	48	51	45	47	48	44
2 - Worse	15	16	19	11	10	11	16	16	24
1 - Much worse	1	2	2	1	1	2	2	3	1
Average 1-5	**3.3**	**3.3**	**3.2**	**3.4**	**3.4**	**3.5**	**3.3**	**3.2**	**3.2**

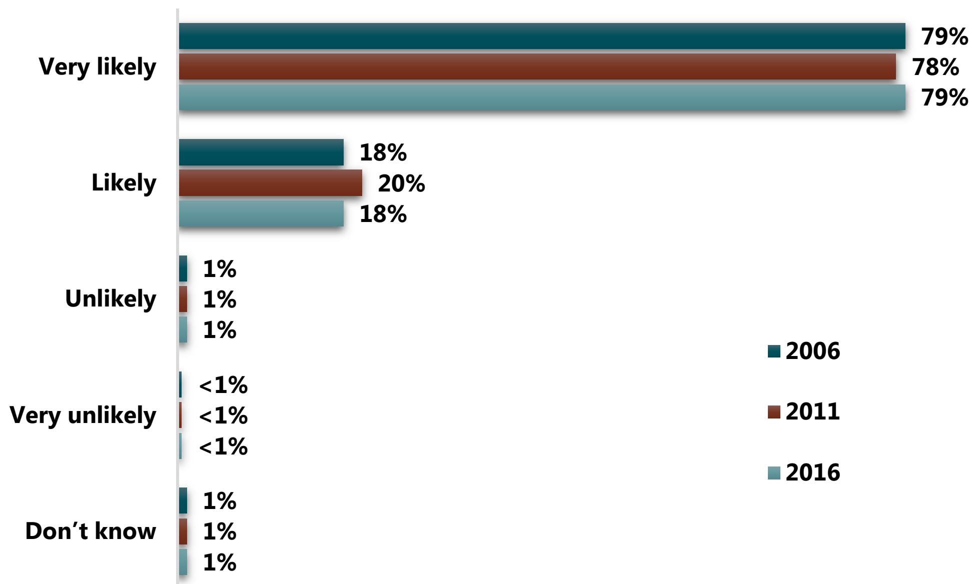
Note: Business visitors were screened out of this question.

Recommending Alaska

Visitors were asked how likely they were to recommend Alaska as a vacation destination.

- Virtually all visitors said they were likely or very likely to recommend Alaska to others, including 79 percent who said they were very likely, and 18 percent who said they were likely. Just 1 percent said they were unlikely to recommend Alaska.
- These rates have remained consistent over the last decade.

CHART 6.4 - Likelihood of Recommending Alaska to Others
All Visitors, 2006, 2011, and 2016



Transportation Market

- Cruise visitors gave the highest "very likely" responses at 80 percent, followed by air visitors (79 percent) and highway/ferry visitors (75 percent).
- Air visitors' likelihood rating increased between 2011 and 2016 (from 74 to 79 percent), while highway/ferry visitors' rating decreased (from 80 to 75 percent). Cruise visitors' likelihood stayed the same all three years at 80 percent.

TABLE 6.4 - Likelihood of Recommending Alaska to Friends/Family
By Transportation Market, 2006, 2011, and 2016 (%)

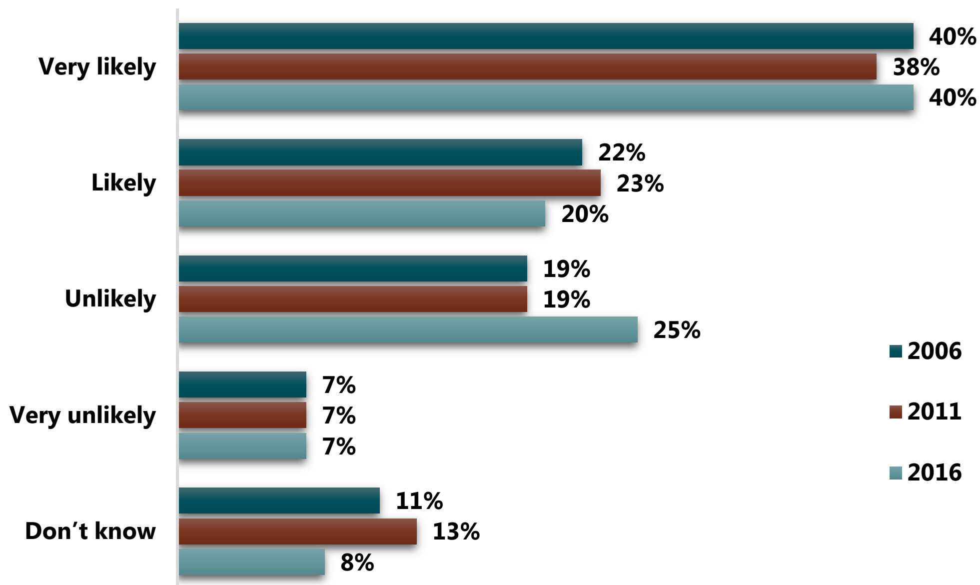
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Very likely	77	74	79	80	80	80	77	80	75
Likely	20	23	18	17	19	17	20	18	19
Unlikely	1	1	1	1	1	1	1	1	2
Very unlikely	<1	<1	<1	1	<1	<1	<1	1	<1
Don't know	2	1	1	1	1	1	3	1	2

Returning to Alaska

Visitors were asked how likely they were to return to Alaska in the next five years.

- Over half of visitors (60 percent) said they were very likely (40 percent) or likely (20 percent) to return. One-third (32 percent) said they were unlikely (25 percent) or very unlikely (7 percent), while 8 percent didn't know.
- While the rate of "very likely" responses increased slightly between 2011 and 2016 (from 38 to 40 percent), the "likely" rate fell (from 23 to 20 percent), and the "unlikely" rate increased (from 19 to 25 percent).

CHART 6.5 - Likelihood of Returning to Alaska in Next Five Years
All Visitors, 2006, 2011, and 2016



Transportation Market

- Air and highway/ferry visitors show much higher likelihood of returning to Alaska, at 60 and 52 percent very likely to return, respectively. This compares to 25 percent of cruise visitors.
- The “very likely” rate increased among cruise visitors between 2011 and 2016, from 21 to 25 percent (similar to the 2006 rate of 26 percent).
- The “very likely” rate declined among air visitors, from 66 percent in 2006, to 62 percent in 2011, to 60 percent in 2016.
- The “very likely” rate increased among highway/ferry visitors, from 46 percent in 2006, to 50 percent in 2011, to 52 percent in 2016.

TABLE 6.5 - Likelihood of Returning to Alaska in Next Five Years By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Very likely	66	62	60	26	21	25	46	50	52
Likely	18	21	21	25	25	20	23	22	20
Unlikely	8	8	10	25	26	35	13	12	16
Very unlikely	2	2	3	10	11	10	9	8	7
Don’t know	6	6	6	14	17	9	9	7	4

Future Activities/Interests

A new question was introduced in 2016, asked of visitors who said they were very likely to return to Alaska in the next five years: "What are you MOST interested in experiencing on your next Alaska trip?" The results below are based to the intercept sample only; the nature of the question precluded replicating it online.

- Among all visitors, the number one response was fishing at 22 percent, followed by wildlife at 10 percent, visit friends/family at 9 percent, and Northern Lights and Denali at 8 percent.
- The top responses among air visitors included fishing (31 percent), visit friends/family (14 percent), and wildlife and Northern Lights, both at 6 percent.
- The top responses among cruise visitors were wildlife (15 percent), Northern Lights (12 percent), and Denali and flightseeing, both at 11 percent.
- The top responses among highway/ferry visitors were fishing (27 percent), and wildlife, visit friends/family, and camping, all at 9 percent.

TABLE 6.6 – What are you MOST interested in experiencing on your next Alaska trip?
By Transportation Market, 2016 (%)
Base: Intercept Sample; Very likely to return to Alaska

	ALL VISITORS 2016	AIR 2016	CRUISE 2016	HWY/FERRY 2016
Fishing	22	31	10	27
Wildlife	10	6	15	9
Visit friends/family	9	14	2	9
Northern Lights	8	6	12	5
Denali	8	5	11	3
Hiking	5	4	6	6
Flightseeing	5	2	11	2
Cruise	5	2	10	6
Camping	3	2	3	9
Glaciers	3	3	4	3
Business	2	3	-	<1
Train	2	1	2	1
Adventure	2	1	2	2
Specific destination	1	2	1	2
Hunt	1	2	1	<1
Native cultures	1	1	1	<1
Arctic	1	1	1	2
Winter	1	1	<1	2
Other	4	5	2	4
Don't know/refused	6	7	6	9

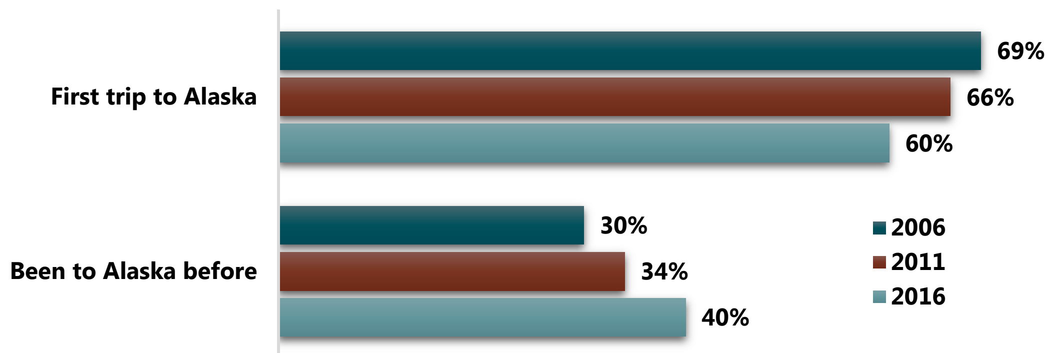
Note: New question in 2016.

Repeat Alaska Travel

Visitors were asked if their current trip was their first time to Alaska.

- Six out of ten Alaska visitors (60 percent) were on their first trip, while 40 percent were repeat travelers.
- The repeat travel rate has increased over the last decade: from 30 percent in 2006, to 34 percent in 2011, to 40 percent in 2016.

CHART 6.7 - Repeat Alaska Travel
All Visitors, 2006, 2011, and 2016



Transportation Market

- Air and highway/ferry visitors show much higher rates of repeat travel (58 and 56 percent, respectively) compared to the cruise market (26 percent).
- While the repeat travel rate has stayed consistent around 58 percent for the air market over the last decade, the rate increased among cruise visitors: from 19 percent in 2006, to 24 percent in 2011, to 26 percent in 2016. The repeat rate among highway/ferry visitors fluctuated: from 50 to 62 to 56 percent over the same time period.

TABLE 6.7 - Repeat Alaska Travel
By Transportation Market, 2006, 2011, and 2016 (%)

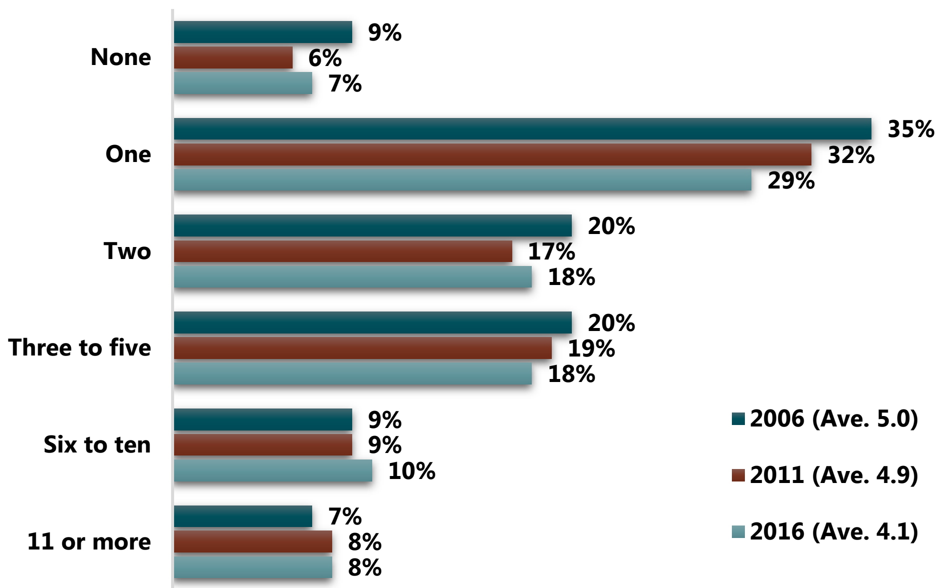
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
First trip to Alaska	41	41	42	81	76	74	50	38	44
Been to Alaska before	59	59	58	19	24	26	50	62	56

Frequency of Alaska Travel

Repeat visitors were asked how many times they had previously been to Alaska, not counting business trips.

- Repeat visitors reported an average of 4.1 previous trips. Nearly half (47 percent) had been once or twice before.
- The average number of previous trips in 2016 (4.1) was down from 2006 (5.0) and 2011 (4.9).
- Some visitors had been to Alaska before, but not for vacation; these visitors answered "none."

CHART 6.8 - Number of Previous Vacation Trips
All Repeat Visitors, 2006, 2011, and 2016



Transportation Market

- The highway/ferry market showed the highest average previous trip rate at 7.3, followed by air at 5.1 and cruise at 2.4.
- Average rates for air and cruise changed little between 2011 and 2016: from 4.9 to 5.1 for air, and from 2.3 to 2.4 for cruise. Highway/ferry showed a wide fluctuation: from 5.3 in 2006, to 19.8 in 2011, to 7.3 in 2016.

TABLE 6.8 - Number of Previous Vacation Trips
By Transportation Market, 2006, 2011, 2016 (%)
Base: Repeat Visitors

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
None[1]	12	9	10	7	3	3	<1	3	2
One	25	21	20	52	50	42	30	25	21
Two	19	15	14	21	20	24	22	14	17
Three to five	23	21	18	14	16	18	20	19	20
Six to ten	12	10	12	4	5	8	14	11	9
Eleven or more	9	10	11	2	1	1	13	27	17
Average number of trips	**4.0**	**4.9**	**5.1**	**2.0**	**2.3**	**2.4**	**5.3**	**19.8**	**7.3**

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

Previous Alaska Cruising

A new question was introduced for the 2016 survey. Repeat visitors were asked whether they had ever traveled by cruise ship in Alaska.

- Forty-one percent of visitors said they had previously traveled by cruise ship in Alaska. The rate ranged from 20 percent among air visitors, to 25 percent among highway/ferry visitors, to 75 percent among cruise visitors.
- When the results are based to all visitors (with first-time visitors counted as "no" responses), the overall rate changes to 16 percent for all visitors, 12 percent for air visitors, 20 percent for cruise visitors, and 14 percent for highway/ferry visitors.

TABLE 6.9 – Previously Traveled by Cruise Ship in Alaska
All Visitors and by Transportation Market, 2016 (%)

	ALL VISITORS	AIR	CRUISE	HWY/FERRY
	2016	2016	2016	2016
Base: Repeat Visitors				
Yes	41	20	75	25
No	59	80	25	75
Base: All Visitors				
Yes	16	12	20	14
No	84	88	80	86

Trip Planning Timeline

Visitors were asked two questions about their trip planning timeline: how many months ahead of time they decided to come to Alaska, and how many months ahead of time they booked their major travel arrangements. The following charts show trip decision and booking timelines based on the calendar year. The timeline was determined by applying the number of months given by respondents to the month in which they participated in the survey. (The calendar month methodology was not employed in the 2006 survey.)

- Visitors decided to visit Alaska an average of 7.7 months before their trip, and booked their major travel arrangements an average of 5.4 months ahead of time.
- While the average lead time for trip decision decreased between 2011 and 2006 (from 8.6 to 7.7 months), the average lead time for trip booking stayed the same at 5.4 months. (Cont'd on next page.)

CHART 6.10 - Timeline of Alaska Trip Decision by Quarter
All Visitors, 2011 and 2016

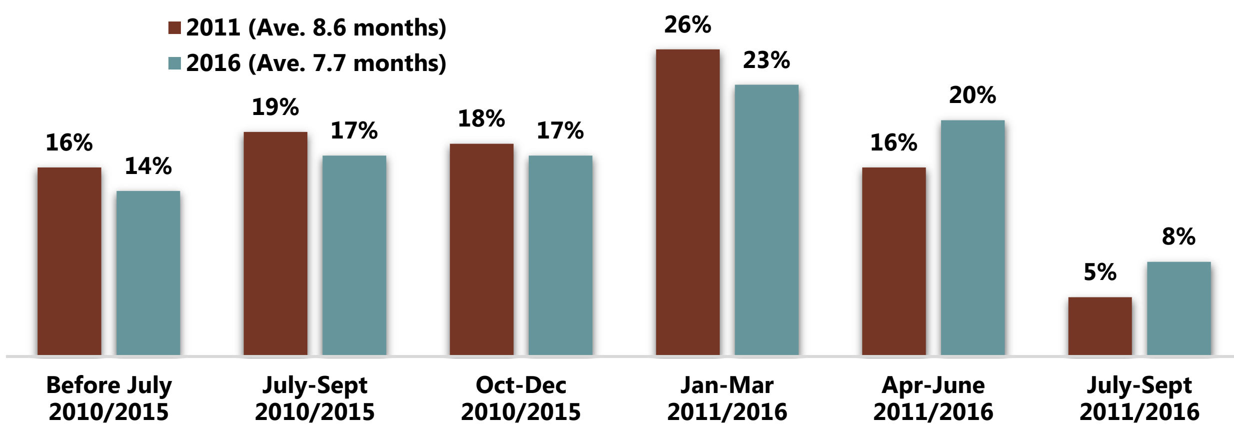
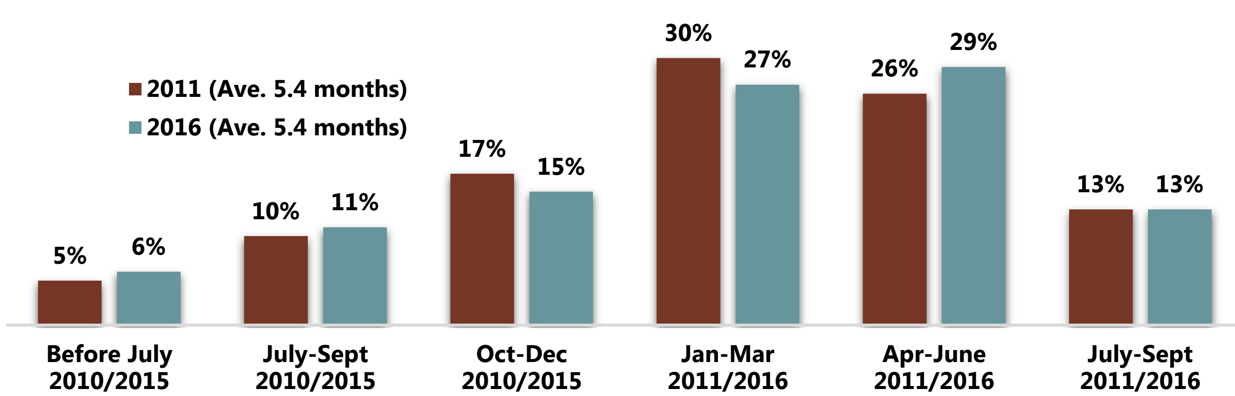


CHART 6.11 - Timeline of Alaska Trip Booking by Quarter
All Visitors, 2011 and 2016



- The most common time frame for making the trip decision was January-March of 2016, for summer 2016 visitors, representing 23 percent of visitors. Other time frames had nearly equal representation: 17 percent decided in July-September 2015; 17 percent decided in October-December 2015; and 20 percent decided in April-June 2016. July-September 2016 represented just 8 percent of visitors.
- The trip decision time frame showed slight decreases for all of the longer-time frame categories (from 16 to 14 percent for before July 2010/15; from 19 to 17 percent for July-September 2010/15; etc.), and increases for the two shorter-time-frame categories (from 16 to 20 percent for April-June 2011/16, and from 5 to 8 percent for July-September 2011/16).
- Changes in trip booking time frame were likewise small, including a shift from 30 to 27 percent for January-March 2011/16, and a shift from 26 to 29 percent for April-June 2011/16.

Transportation Market

- Cruise passengers planned the furthest in advance, including for both trip decision (8.8 months) and trip booking (6.6 months). This compares with 7.9 and 3.3 months among highway/ferry visitors, respectively, and 5.9 and 3.7 months among air visitors.
- Air visitors' average timeline for trip decision decreased between 2011 and 2016, from 6.7 to 5.9 months. However, their trip booking timeline increased from 3.5 to 3.7 months.
- Cruise visitors' average timeline for trip decision decreased between 2011 and 2016, from 9.4 to 8.8 months, while their trip booking timeline was consistent at 6.6 months.
- Highway/ferry visitors' average timeline for trip decision dropped from 12.7 to 7.9 months; their trip booking timeline dropped from 3.6 to 3.3 months.

TABLE 6.11 - Trip Planning Timeline
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
How far in advance did you decide to come on this trip to Alaska?									
Before July 2015	n/a	9	7	n/a	20	18	n/a	26	17
July-September 2015	n/a	16	14	n/a	21	19	n/a	21	14
October-December 2015	n/a	14	13	n/a	20	21	n/a	14	9
January-March 2016	n/a	30	25	n/a	24	23	n/a	21	18
April-June 2016	n/a	23	29	n/a	13	14	n/a	13	29
July-September 2016	n/a	9	13	n/a	3	5	n/a	5	12
Average # of months	**6.3**	**6.7**	**5.9**	**9.0**	**9.4**	**8.8**	**9.5**	**12.7**	**7.9**
How far in advance did you book your major travel arrangements?									
Before July 2015	n/a	1	1	n/a	7	9	n/a	1	1
July-September 2015	n/a	4	5	n/a	15	15	n/a	5	3
October-December 2015	n/a	10	10	n/a	21	19	n/a	11	5
January-March 2016	n/a	26	25	n/a	32	29	n/a	27	12
April-June 2016	n/a	36	40	n/a	19	20	n/a	31	42
July-September 2016	n/a	24	19	n/a	5	8	n/a	25	37
Average # of months	**3.5**	**3.5**	**3.7**	**6.7**	**6.6**	**6.6**	**2.6**	**3.6**	**3.3**

Note: The number of months was translated into specific months/years based on when the survey occurred.

Supplemental Analysis: Trip Planning Timeline

In order to better understand how different kinds of visitors may have different trip planning timelines, survey results were analyzed by the quarter in which the trip decision was made, as well as when the trip was booked.

- In terms of trip purpose, visitors who planned their trip earlier were more likely to be traveling for vacation/pleasure. The vacation/pleasure percentage was highest for those who made their trip decision before July 2015 (93 percent), and decreased steadily over time, to 58 percent among those who decided between July and September 2016. A similar pattern occurs for trip booking timeline: 98 percent of those who booked before July 2015 were traveling for vacation/pleasure; this percentage declines to 61 percent for those who booked between July and September 2016.
- Early planners were much more likely to have purchased a multi-day package: 82 percent of the earliest deciders were package travelers, declining to 37 percent of the latest deciders. Similarly, 96 percent of the earliest bookers were package travelers, compared with 37 percent of the latest bookers.
- In a related finding, early planners were more likely to be cruise passengers, while later planners were less likely. The cruise passenger rate falls from 76 percent among those who made their trip decision the earliest, to 33 percent among those who made their decision the latest. In terms of booking, the cruise percentage falls from 90 percent to 33 percent.
- Early planners were much less likely to be from the Western U.S., while late planners were much more likely. The percentage of Western visitors grows from 29 percent among those who made their decision before July 2015, to 48 percent among those who decided between July and September 2016. Those percentages grow from 20 to 47 percent in terms of trip booking. This finding is logical, considering that Western U.S. visitors have a lower vacation/pleasure rate compared with other markets.
- Late planners are more likely to be repeat Alaska travelers: 56 percent of the latest decision makers were repeat travelers, compared with 27 percent of the earliest decision makers. Those figures are similar for booking: 53 percent, compared with 23 percent.
- Early planners were more likely to use a travel agent: 48 percent of the earliest deciders used a travel agent, declining to 20 percent among the latest deciders. Similarly, 61 percent of the earliest bookers used a travel agent, down to 21 percent among the latest bookers.
- Average party size was slightly higher among the earliest deciders (2.5 people) compared to the latest deciders (1.8 people). Average age was slightly higher among the earliest deciders (55.7 years) compared to the latest deciders (51.4 years). Retirement rates were much higher among the earliest deciders (52 percent) compared to the latest decider (36 percent).
- While not shown in the following table, activity participation and destinations differed somewhat by trip planning timeline. Differences tended to reflect the cruise participation rate; for example, early deciders were more likely to visit Southeast, because they were more likely to be cruise passengers, than late deciders. Likewise, early deciders were more likely to take a train because they contain a higher proportion of cruise passengers.
- Additional survey data not shown in the following table, such as gender and online planning/booking, did not show significant differences by trip planning timeline.

TABLE 6.12 – Selected Survey Results
By Quarter of Trip Decision/Trip Booking (%)

	TRIP DECISION TIMELINE					
	Before Jul 2015	Jul-Sep 2015	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016
Trip Purpose						
Vacation/pleasure	93	88	89	78	63	58
Visiting friends/relatives	5	9	9	16	21	16
Business	1	1	1	3	10	20
Business/pleasure	1	2	2	3	6	5
Packages						
Purchased package	82	74	76	63	43	37
Cruise visitor	76	65	69	56	39	33
Origin						
Western U.S.	29	34	31	41	49	48
Southern U.S.	24	26	21	21	17	17
Midwestern U.S.	18	15	18	16	11	10
Eastern U.S.	9	11	11	10	8	7
International	15	8	13	7	6	6
Canada	6	6	7	6	9	12
Demographics						
Average party size	2.5	2.7	2.5	2.4	2.1	1.8
Average age	55.7	53.3	56.1	54.6	50.7	51.4
Retired/semi-retired	52	43	46	47	37	36
Other						
Repeat Alaska traveler	27	39	36	39	46	56
Used travel agent	48	42	41	36	22	20
	TRIP BOOKING TIMELINE					
	Before Jul 2015	Jul-Sep 2015	Oct-Dec 2015	Jan-Mar 2016	Apr-Jun 2016	Jul-Sep 2016
Trip Purpose						
Vacation/pleasure	98	97	93	85	65	61
Visiting friends/relatives	1	2	6	12	22	18
Business	0	0	1	1	8	16
Business/pleasure	0	1	1	2	6	5
Packages						
Purchased package	96	90	82	69	45	37
Cruise visitor	90	82	74	62	40	33
Origin						
Western U.S.	20	29	33	37	45	47
Southern U.S.	24	26	20	21	20	17
Midwestern U.S.	20	15	17	17	13	11
Eastern U.S.	11	13	11	9	8	8
International	17	10	12	10	6	6
Canada	8	7	7	6	7	10
Demographics						
Average party size	2.3	2.8	2.7	2.5	2.2	2.0
Average age	57.2	54.3	56.5	54.3	51.7	52.1
Retired/semi-retired	63	43	49	45	38	40
Other						
Repeat Alaska traveler	23	33	36	36	45	53
Used travel agent	61	49	43	40	24	21

Internet Usage

The survey questions addressing internet usage were modified from AVSP 5 and 6 to gather more detailed information. The 2006 and 2011 question was:

Did you use the Internet to research or book any portion of your trip?

The 2016 question was changed to:

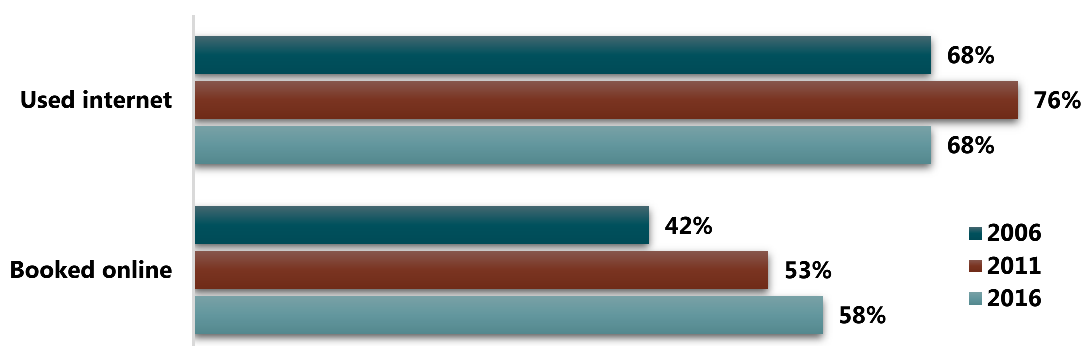
Did you use the internet, including any apps, to plan or book any portion of your Alaska trip?

The purpose of this change was to ensure that app usage was included in responses.

The survey results for this question, and subsequent questions on portions booked online, were based to the intercept sample (rather than the combined intercept/online sample) to eliminate bias among online respondents towards online usage.

- Two-thirds of visitors (68 percent) said they used the internet to plan or book their Alaska trip, including 58 percent who booked some portion of their trip online.
- A decline in online usage between 2011 and 2016 (from 76 to 68 percent) may be related to the change in the question wording; it is possible that "research" was a more all-inclusive term than "plan."
- Online booking rates increased over the last decade, from 42 percent in 2006, to 53 percent in 2011, to 58 percent in 2016.

CHART 6.13 – Internet/App Usage to Plan or Book Alaska Trip
All Visitors, 2006, 2011, and 2016
Base: Intercept Respondents



Note: The wording of the question changed in 2016.

Transportation Market

- Air visitors were the most likely to use the internet at 82 percent, and the most likely to book online at 76 percent. This compares with 61 and 47 percent of the cruise market, respectively, and 57 and 36 percent of the highway/ferry market.
- Air visitors' internet usage stayed about the same between 2011 (80 percent) and 2016 (82 percent), but online booking rates increased (from 69 to 76 percent).
- Cruise visitors' internet usage declined between 2011 and 2016 (from 75 to 61 percent), while online booking rates stayed about the same (from 46 to 48 percent).
- Highway/ferry visitors' internet usage declined between 2011 and 2016 (from 67 to 57 percent), while online booking rates stayed about the same (from 37 to 36 percent).

TABLE 6.13 – Internet Usage to Plan or Book Alaska Trip
By Transportation Market, 2006, 2011, and 2016 (%)
Base: Intercept Respondents

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Used internet	75	80	82	66	75	61	58	67	57
Booked online	60	69	76	33	46	48	29	37	36
Did not use internet	25	18	14	33	25	37	40	32	39
Don't know	1	2	4	2	1	3	2	<1	3

Note: The wording of the question changed in 2016.

Specific Websites and Apps

After visitors were asked about usage of the official State of Alaska website (see following section), they were asked two new questions:

Which other websites or apps did you use in planning your Alaska trip?

Which of these sites did you use to book portions of your Alaska trip?

Respondents were shown a list of 29 websites, apps, and categories (such as "cruise line websites") for both questions. The list was based on research into the most commonly used travel websites and input from ATIA. Additional sites were added in the coding process based on the most common "other" responses.

The chart on the next page shows the top 15 responses based on planning sources. A full list in table format is provided on the following page, along with responses by transportation market.

- The number one online source for planning was airline websites, mentioned by 50 percent of online planners, followed by cruise line websites (35 percent), Google (28 percent), Trip Advisor (23 percent), and Expedia (14 percent).
- The number one online sources for booking were airline websites (50 percent), cruise line websites (27 percent), Expedia (10 percent), hotel/lodge/RV park (10 percent), and car/RV rental websites (9 percent).
- Sources with large gaps between planning and booking rates included: Google (28 percent used it for planning, versus 4 percent who used it for booking); Trip Advisor (23 versus 3 percent); and Travelocity (7 versus 2 percent); CruiseCritic (7 versus 1 percent); Facebook (7 versus <1 percent); and Chamber/CVB (6 versus <1 percent).

Transportation Market

- Not surprisingly, air visitors were much more likely to cite airline websites for both planning and booking (64 percent for planning, 65 percent for booking) than cruise visitors (40 and 39 percent) or highway/ferry visitors (22 and 23 percent).
- Two-thirds of cruise visitors (67 percent) used cruise line websites to plan; 54 used them to book. Other popular planning sites among the cruise market were Trip Advisor (28 percent planning; 3 percent booking), Google (27 and 2 percent); CruiseCritic.com (13 and 1 percent); Expedia (11 and 8 percent); and tour company websites (10 and 6 percent).
- Besides airline websites, air visitors were most likely to use Google (26 percent for planning, 5 percent for booking); Trip Advisor (18 and 4 percent); car/RV rental websites (18 and 16 percent); Expedia (15 and 12 percent); and hotel/lodge/RV park (14 and 13 percent).
- The most popular sites for the highway/ferry market were Google (44 percent planned, 9 percent booked); Alaska Marine Highway (27 and 19 percent); Trip Advisor (24 and 5 percent); airline websites (22 and 23 percent); and hotel/lodge/RV park (19 and 12 percent).

CHART 6.14 – Websites and Apps Used to Research and Book Alaska Trip, Top 15
All Visitors, 2016
Base: Used Internet

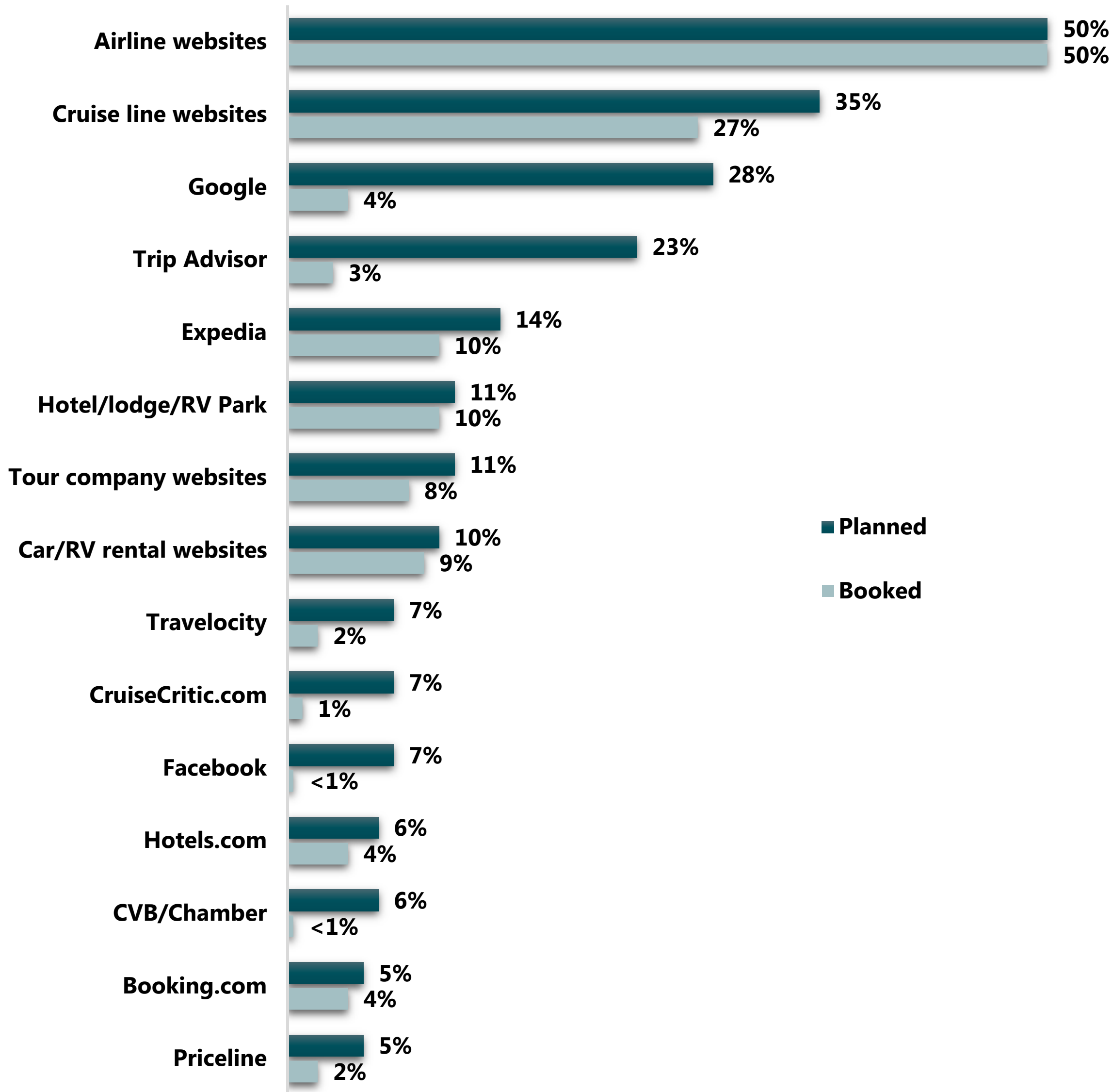


TABLE 6.14 – Websites and Apps Used to Research and Book Alaska Trip
By Transportation Market, 2016 (%)
Base: Used Internet

	ALL VISITORS		AIR		CRUISE		HWY/FERRY	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	64	65	40	39	22	23
Cruise line websites	35	27	3	2	67	54	3	2
Google	28	4	26	5	27	2	44	9
Trip Advisor	23	3	18	4	28	3	24	5
Expedia	14	10	15	12	14	8	11	7
Hotel/lodge/RV Park	11	10	14	13	8	6	19	12
Tour company websites	11	8	12	10	10	6	10	6
Car/RV rental websites	10	9	18	16	3	2	9	8
Travelocity	7	2	6	3	9	2	6	2
CruiseCritic.com	7	1	<1	<1	13	1	-	-
Facebook	7	<1	5	<1	8	<1	7	1
Hotels.com	6	4	8	6	5	2	7	4
CVB/Chamber	6	<1	2	<1	9	<1	8	1
Booking.com	5	4	7	5	3	2	12	9
Priceline	5	2	5	2	6	1	2	<1
Kayak.com	5	2	7	3	3	1	4	2
AAA.com	4	2	3	1	5	2	11	4
Yelp	4	<1	4	<1	4	<1	4	-
Alaska App	4	1	6	2	3	<1	6	2
Alaska Marine Highway	4	2	4	3	2	<1	27	19
AirBnB	4	2	6	4	2	<1	4	4
Orbitz	3	2	4	2	3	1	2	1
VRBO	2	1	3	3	1	<1	3	2
LonelyPlanet.com	2	<1	2	<1	2	<1	2	<1
Hotwire	1	1	2	1	1	1	1	<1
Vacationstogo	1	1	<1	-	2	2	-	-
Costco	1	1	<1	1	2	2	<1	<1
Instagram	1	<1	1	<1	1	-	2	<1
HotelTonight	1	<1	<1	<1	1	<1	1	-
ARR	1	<1	1	1	1	<1	<1	<1
Concur	1	1	2	2	-	-	-	-
Alaska.org	1	<1	1	<1	1	-	<1	-
Hipmunk	1	<1	1	<1	1	<1	1	<1
NPS	1	<1	1	1	<1	<1	1	1
ADF&G	<1	<1	1	<1	-	-	-	-
CheapOair	<1	<1	1	1	<1	<1	-	-
Twitter	<1	-	<1	-	<1	-	<1	-
Other	6	4	4	3	7	4	8	3
Don't know	5	10	3	3	6	14	5	27

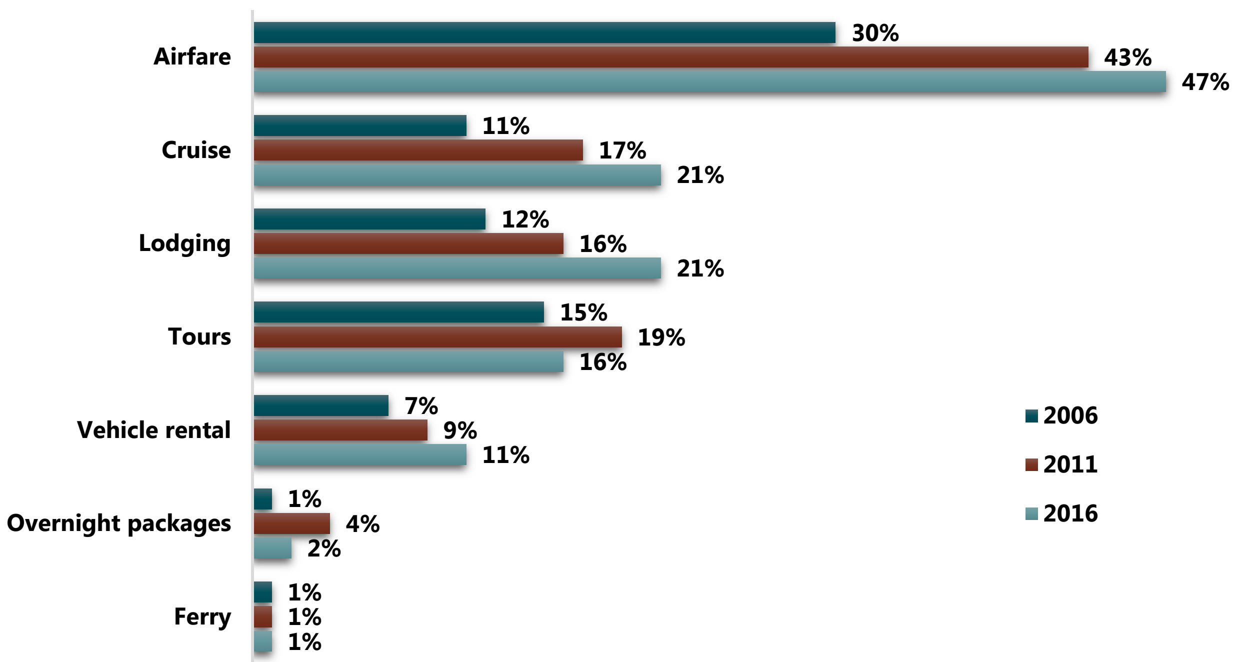
Note: New question in 2016.

Trip Components Booked Online

Visitors who had booked online were asked which trip components were booked online. Results were then based to all (intercept) respondents.

- Trip components most commonly booked online included airfare (47 percent), cruise (21 percent), lodging (21 percent), and tours (16 percent).
- Online booking rates increased for most categories over the last decade, including airfare (from 30 percent in 2006 to 47 percent in 2016), lodging (from 12 to 21 percent), cruise (from 11 to 21 percent), and vehicle rental (from 7 to 11 percent). One exception was tours, which fluctuated from 15 percent in 2006, to 19 percent in 2011, to 16 percent in 2016.

CHART 6.15 - Trip Components Booked over Internet/Apps
All Visitors, 2006, 2011, and 2016
Base: Intercept Respondents



Transportation Market

- Online booking patterns varied widely by transportation market. Air visitors were most likely to book airfare online (73 percent), followed by lodging (35 percent) and vehicle rental (25 percent). Cruise passengers commonly booked their cruise online (35 percent), as well as airfare (32 percent) and tours (20 percent). The highway/ferry market booked online much less frequently, with 20 percent booking lodging and 16 percent booking airfare.

TABLE 6.15 - Trip Components Booked over Internet/Apps By Transportation Market, 2006, 2011, and 2016 (%) Base: Intercept Respondents

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Airfare	56	66	73	18	32	32	17	19	16
Lodging	24	31	35	5	11	13	9	20	20
Vehicle rental	17	24	25	1	4	3	5	8	6
Tours	9	15	12	19	28	20	7	10	8
Overnight packages	2	4	3	<1	3	2	<1	2	1
Cruise	1	2	2	18	30	35	-	1	1
Ferry	1	3	2	<1	<1	<1	9	19	11

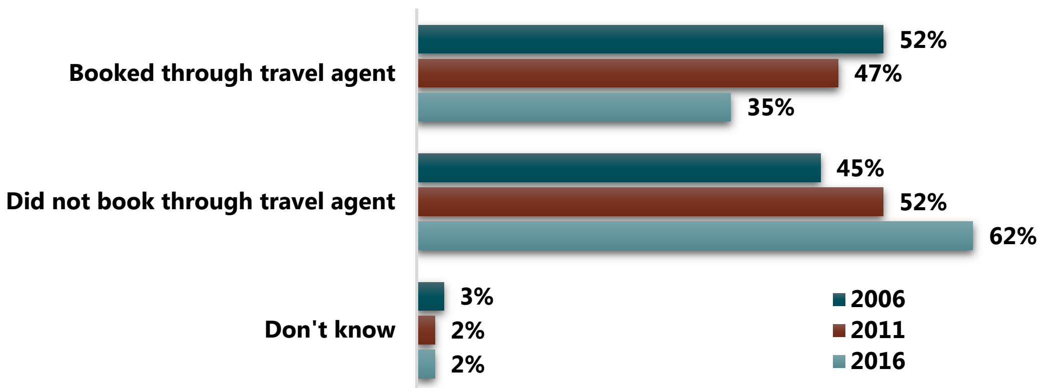
Note: Some highway/ferry visitors enter or exit the state via air, and others travel by air within the state.

Travel Agent Usage

Visitors were asked whether they booked any portions of their trip through a travel agent.

- Just over one-third of visitors (35 percent) used a travel agent to book portions of their trip.
- The rate of travel agent usage has steadily decreased, from 52 percent in 2006, to 47 percent in 2011, to 35 percent in 2016.

CHART 6.16 - Travel Agent Usage
All Visitors, 2006, 2011, and 2016



Transportation Market

- Cruise passengers were much more likely to use travel agents at 54 percent, compared to 11 percent of air visitors and 5 percent of highway/ferry visitors.
- Travel agent usage decreased among all three transportation markets: from 24 percent in 2006, to 17 percent in 2011, to 11 percent in 2016 for the air market; from 71 to 68 to 54 percent for the cruise market; and from 11 to 9 to 5 percent for the highway/ferry market.

TABLE 6.16 - Travel Agent Usage
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Booked through travel agent	24	17	11	71	68	54	11	9	5
Did not book through travel agent	75	81	87	25	30	43	86	90	93
Don’t know	1	2	2	4	2	3	3	1	1

Trip Components Booked Through a Travel Agent

Visitors who had used a travel agent were asked which trip components were booked through the travel agent. Results were then based to all visitors. The breakout by transportation market below excludes the highway/ferry market, as the sample size was too small for analysis.

- The most frequent trip component booked through a travel agent was the cruise (28 percent) followed by airfare (22 percent).
- Booking cruises through a travel agent declined from 38 percent in 2011 to 28 percent in 2016. Booking airfare dropped slightly, from 25 to 22 percent.

Transportation Market

- Among air travelers, airfare bookings via travel agent declined from 14 percent in 2011 to 8 percent in 2016. Lodging bookings declined from 9 to 6 percent.
- While use of travel agents for booking cruises declined from 64 percent in 2011 to 49 percent in 2016, cruise passengers booked other trip components at similar rates.

TABLE 6.17 - Trip Components Booked through a Travel Agent By Transportation Market, 2011 and 2016 (%)

	ALL VISITORS		AIR		CRUISE	
	2011	2016	2011	2016	2011	2016
Cruise	38	28	1	1	64	49
Airfare	25	22	14	8	34	32
Tours	15	15	4	4	23	23
Lodging	12	12	9	6	15	17
Overnight packages	7	4	3	2	10	6
Vehicle rental	3	2	5	3	1	1
Ferry	1	<1	<1	<1	<1	<1

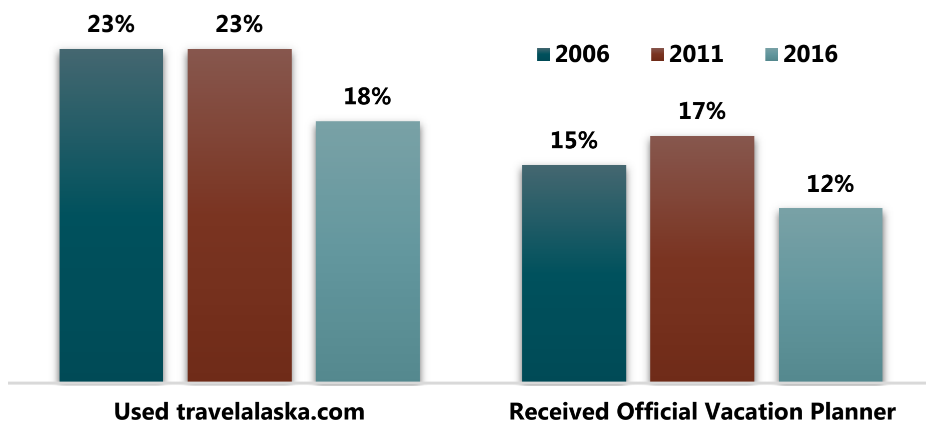
Note: This question was not asked in the 2006 survey.

Usage of State of Alaska Information Sources

Visitors who had used the internet were asked if they had visited the official State of Alaska travel website, www.travelalaska.com. Results were then based to the total sample. All visitors were also asked whether they had received the State of Alaska Official Vacation Planner. (As explained previously, results for several questions related to online planning, including usage of travelalaska.com, were based to intercept respondents only.)

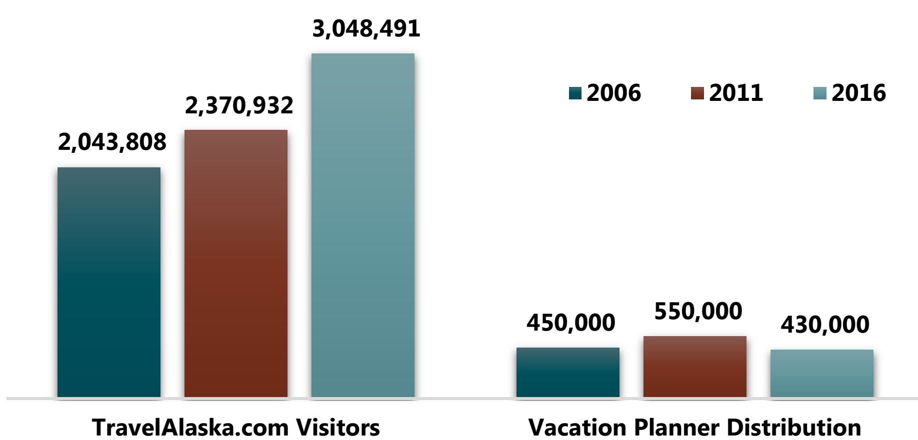
- One out of five visitors (18 percent) recalled using travelalaska.com, while 12 percent said they had received the Official Vacation Planner.
- Usage rates dropped for both sources between 2011 and 2016: from 23 to 18 percent for the website, and from 17 to 12 percent for the Planner. Changes differed by transportation market, discussed below.

CHART 6.18 - Usage of State of Alaska Information Sources
All Visitors, 2006, 2011, and 2016



The chart below shows usage statistics for the State of Alaska official website and Planner, provided by Alaska Travel Industry Association. Website usage increased significantly over the last decade, while Planner distribution was lower in 2016 than in either 2006 or 2011.

CHART 6.19 – Usage Statistics for Travelalaska.com and Planner
Fiscal Years 2006, 2011, and 2016



Source: Alaska Travel Industry Association.

Transportation Market

- Cruise passengers were slightly less likely than the air and highway/ferry market to have visited travelalaska.com at 17 percent, compared to 20 and 22 percent, respectively. Highway/ferry visitors were more likely than cruise or air visitors to have received the Planner at 21 percent, compared to 11 percent for both cruise and air.
- Between 2011 and 2016, travelalaska.com usage declined in the cruise (from 23 to 17 percent) and highway/ferry (31 to 22 percent), while the air market stayed about the same (from 21 to 20 percent).
- Between 2011 and 2016, Planner usage fell by 4 to 6 percentage points for each transportation market: from 16 to 11 percent for air visitors, from 17 to 11 percent for cruise visitors, and from 25 to 21 percent for highway/ferry visitors.

TABLE 6.18 - Usage of State of Alaska Information Sources By Transportation Market, 2006, 2011, and 2016 (%)

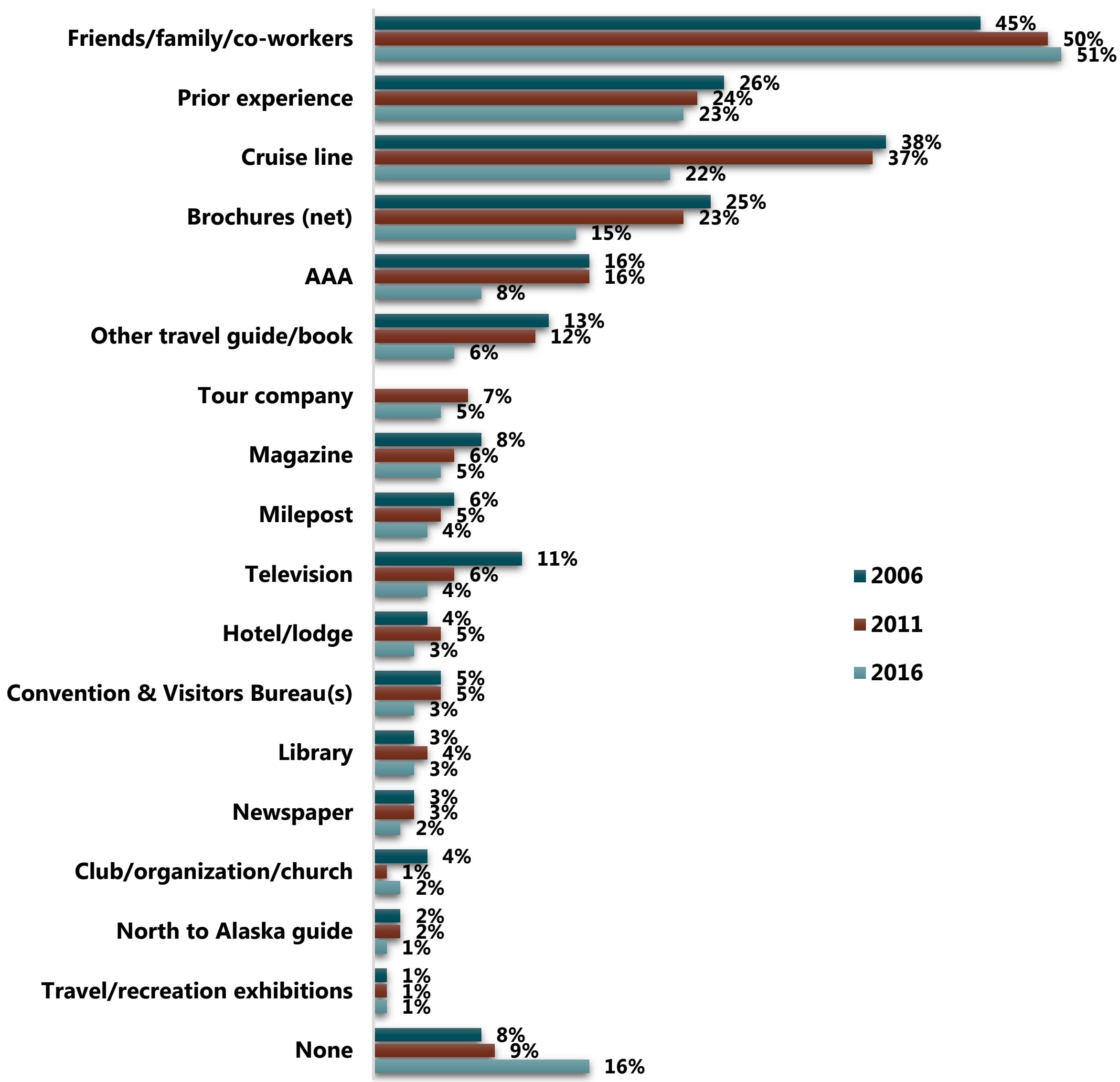
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Did you visit the official State of Alaska travel website? (www.travelalaska.com) (Intercept Only)									
Yes	21	21	20	23	23	17	30	31	22
No	74	75	75	65	70	78	61	67	72
Don't know	4	5	5	10	7	5	7	3	5
Did you receive the Official Alaska State Vacation Planner?									
Yes	12	16	11	15	17	11	27	25	21
No	84	81	85	76	78	83	66	72	68
Don't know	4	4	3	9	5	5	8	3	8

Usage of Additional Information Sources

After visitors were asked about their usage of the internet, travel agents, and State of Alaska sources, they were shown a list of other information sources and asked to identify which they had used in planning their Alaska trip. The question was modified in 2016 to specifically exclude online sources, due to the greater detail collected in the new question on websites and apps.

- The top sources of information, other than online sources and travel agents, were friends/family/co-workers (51 percent), prior experience (23 percent), cruise line (22 percent), and brochures (15 percent).
- While most sources saw a decline in usage rates between 2011 and 2016, some of the decline is attributable to the change in the question wording, which specifically excluded websites and apps.

CHART 6.20 - Information Sources Besides Websites/Apps and Travel Agents
All Visitors, 2006, 2011, and 2016



Note: This question was changed from 2006 and 2011 to specifically exclude online sources.

Transportation Market

- Compared with the cruise and highway/ferry markets, air visitors were more likely to use friends/family/co-workers and prior experience. Not surprisingly, cruise visitors relied heavily on their cruise lines, while highway/ferry visitors were much more likely to use the Milepost.
- Usage rates declined between 2011 and 2016 for most sources across all three transportation markets. Those saying they didn't use any other sources increased, from 11 to 16 percent among air visitors, from 9 to 16 percent among cruise visitors, and from 8 to 13 percent among highway/ferry visitors. However, some decline is attributable to the change in question that specifically excluded websites and apps.

TABLE 6.20 - Information Sources Besides Websites/Apps and Travel Agents By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Friends/family/co-workers	52	60	56	43	45	49	33	34	41
Prior experience	45	35	34	16	15	16	17	43	32
Brochures (net)	22	22	17	26	23	13	32	34	27
Community brochures	3	4	2	1	2	1	9	6	4
Ferry brochure/schedule	2	3	2	<1	1	1	10	17	6
Other travel guide/book	11	11	7	13	13	5	20	14	13
Hotel/lodge	8	10	6	2	2	2	2	4	3
AAA	12	9	5	18	20	10	20	11	13
Milepost	9	8	5	1	1	1	40	33	36
Magazine	7	7	5	8	5	4	8	7	9
Tour company	n/a	4	4	n/a	9	6	n/a	2	2
Television	4	5	3	16	7	5	5	5	5
Convention & Visitors Bureau(s)	7	5	3	4	5	2	16	7	12
Cruise line	5	2	2	59	62	38	2	1	1
Library	2	3	2	4	4	3	2	6	1
Newspaper	4	2	1	2	3	2	3	4	4
North to Alaska guide	1	2	1	3	2	1	4	5	6
Club/organization/church	4	1	1	4	1	3	2	1	3
Travel/recreation exhibitions	1	1	1	1	1	1	2	1	2
None	10	11	16	7	9	16	10	8	13
Don't know/Refused	1	1	2	1	1	3	4	1	3

Note: This question was changed from 2006 and 2011 to specifically exclude online sources.

AVSP 7 – Summer 2016

Section 7:
Visitor Profile -
Demographics and Spending

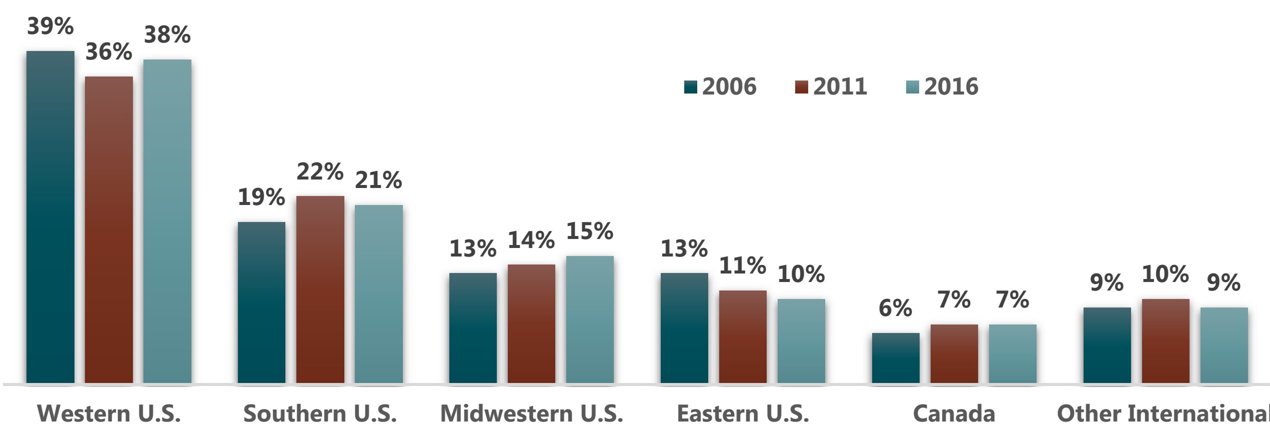
McDowell GROUP

Origin

Visitors were asked what state, country, or province they were visiting from. The chart below shows results for the major U.S. regions, for all visitors. Tables on the following pages show more detailed results for all visitors, including leading states and countries, followed by results by transportation market.

- The most common region of origin among Alaska visitors is Western U.S (38 percent), followed by the South (21 percent), Midwest (15 percent), and East (10 percent). Canada accounted for 7 percent of visitors, and other international countries accounted for 9 percent.
- The most common states of origin are California (12 percent), Washington (10 percent), Texas (5 percent), Oregon (4 percent), and Florida (4 percent) (see table on following page).
- Visitor origin has changed very little over the last decade, with all changes by region and state falling within 3 percent over the 10-year period, and changes of only 1 to 2 percent since 2011.
- The international market is explored in more detail in Section 19.

CHART 7.1 – Origin (By Region)
All Visitors, 2006, 2011, and 2016



Region Definition

- **Western U.S.:** Arizona, California, Colorado, Idaho, Hawaii, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming
- **Southern U.S.:** Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, South Carolina, Tennessee, Texas, Virginia, West Virginia
- **Midwestern U.S.:** Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Wisconsin
- **Eastern U.S.:** Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington D.C.

TABLE 7.1 – Origin (Detailed)
All Visitors, 2006, 2011, and 2016 (%)

	ALL VISITORS		
	2006	2011	2016
United States	**85**	**83**	**84**
Western US	**39**	**36**	**38**
California	14	12	12
Washington	8	9	10
Oregon	4	3	4
Arizona	4	2	3
Colorado	2	3	3
Utah	1	1	2
Nevada	2	1	2
Southern US	**19**	**22**	**21**
Texas	5	6	5
Florida	4	4	4
Midwestern US	**13**	**14**	**15**
Ohio	2	2	2
Minnesota	3	2	2
Illinois	2	3	2
Michigan	2	2	2
Eastern US	**13**	**11**	**10**
New York	2	3	2
Pennsylvania	3	3	2
Canada	**6**	**7**	**7**
British Columbia	n/a	3	3
Ontario	n/a	2	1
Alberta	n/a	1	1
Yukon	n/a	1	1
Other International	**9**	**10**	**9**
Europe	6	4	3
Australia/New Zealand	2	3	3
Asia	1	1	1
Latin America	n/a	n/a	1

Note: U.S. states representing 2 percent or more of all visitors, and Canadian provinces with 1 percent or more, are shown.

Transportation Market

See table, next page.

- Over half of air visitors (52 percent) were from the West, with the South (17 percent), Midwest (14 percent), and East (8 percent) representing much smaller markets. Compared to cruise and highway/ferry visitors, air visitors were much less likely to be from Canada (1 percent) or other international countries (7 percent). Air visitors' origin has changed very little over the last decade, with all changes within 3 percentage points.
- Cruise visitors are most likely to be from the West (30 percent) or the South (24 percent), followed by Midwest (15 percent), East (11 percent), other international (11 percent), and Canada (9 percent). Like air visitors, origin rates have changed little over the last decade. The biggest change was in the Eastern U.S. market, which decreased from 16 percent in 2006, to 12 percent in 2011, to 11 percent in 2016.

- The highway/ferry market shows more fluctuations in terms of origin compared to other visitors. Between 2011 and 2016, the Western U.S. market grew from 27 to 32 percent; the Southern market grew from 10 to 14 percent; the Canadian market fell from 36 to 31 percent; and other internationals fell from 12 to 8 percent.

TABLE 7.2 - Origin
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
United States	**93**	**92**	**92**	**82**	**80**	**80**	**65**	**52**	**61**
Western US	**54**	**52**	**52**	**31**	**27**	**30**	**32**	**27**	**32**
Washington	15	17	16	5	4	5	8	7	8
California	15	13	13	14	12	13	6	6	6
Oregon	6	5	6	2	2	2	6	3	4
Colorado	5	4	4	1	2	2	1	2	2
Arizona	3	3	3	4	2	3	3	2	3
Idaho	3	3	2	1	1	1	1	2	2
Southern US	**16**	**19**	**17**	**22**	**25**	**24**	**15**	**10**	**14**
Texas	4	5	5	6	7	6	5	2	3
Florida	3	3	3	5	5	5	3	2	3
Midwestern US	**12**	**13**	**14**	**14**	**16**	**15**	**14**	**11**	**11**
Minnesota	4	2	3	2	2	2	3	2	1
Illinois	1	3	2	2	4	2	1	2	2
Ohio	1	1	2	3	3	3	1	2	1
Michigan	1	2	2	2	2	2	3	1	2
Wisconsin	2	2	2	1	2	1	2	2	1
Eastern US	**10**	**9**	**8**	**16**	**12**	**11**	**4**	**5**	**4**
Pennsylvania	2	2	2	4	3	2	1	1	1
New York	1	2	2	3	3	3	1	1	1
New Jersey	1	1	<1	2	2	2	<1	<1	1
Canada	**1**	**1**	**1**	**7**	**8**	**9**	**24**	**36**	**31**
British Columbia	n/a	<1	<1	n/a	4	5	n/a	7	8
Ontario	n/a	<1	<1	n/a	3	2	n/a	4	2
Alberta	n/a	<1	<1	n/a	1	1	n/a	4	2
Yukon	n/a	<1	-	n/a	<1	-	n/a	18	16
Other International	**6**	**6**	**7**	**11**	**12**	**11**	**11**	**12**	**8**
Europe	4	4	4	7	4	3	8	10	6
Asia	1	1	2	<1	1	1	<1	<1	<1
Australia/New Zealand	1	1	1	2	4	5	2	1	1
Latin America	n/a	n/a	<1	n/a	n/a	1	n/a	n/a	<1

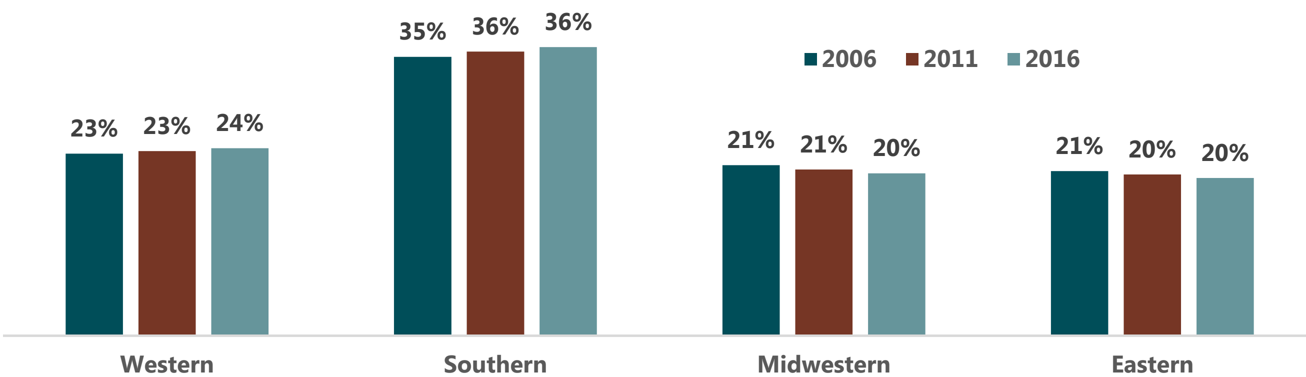
Note: U.S. states representing 2 percent or more of all visitors, and Canadian provinces with 1 percent or more, are shown.

Supplemental Analysis: U.S. Population by Region Compared to Alaska Visitors

The first chart below shows U.S. population distribution by region (excluding Alaska) over the three AVSP years of 2006, 2011, and 2016, according to U.S. Census data. The second chart shows Alaska visitor distribution over the same time period. (The second chart differs from data on previous pages in that it excludes Canadian and other international visitors.)

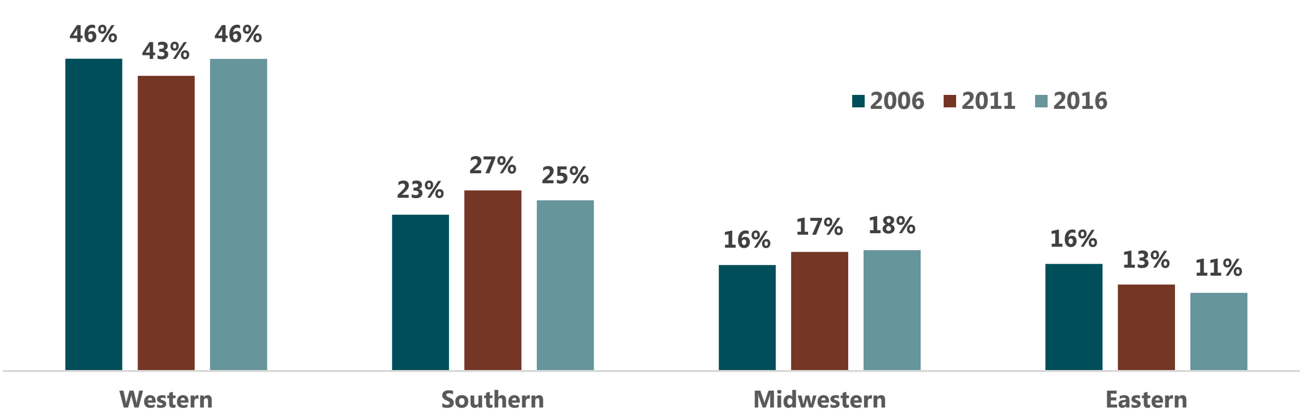
- Compared to the overall U.S. population, Alaska visitors are much more likely to be from the West (46 versus 24 percent), and less likely to be from the other three regions.
- Distribution of U.S. population by region has been consistent over the last decade, with all changes within 1 percent. Distribution of Alaska visitors by region shows slightly more fluctuation, with the biggest change in the Eastern market, which fell from 16 to 11 percent between 2006 and 2016.

CHART 7.3 - U.S. Population by Region, Excluding Alaska 2006, 2011, and 2016 (%)



Source: U.S. Census.

CHART 7.4 - Alaska Visitors by U.S. Region, Excluding Alaska 2006, 2011, and 2016 (%)

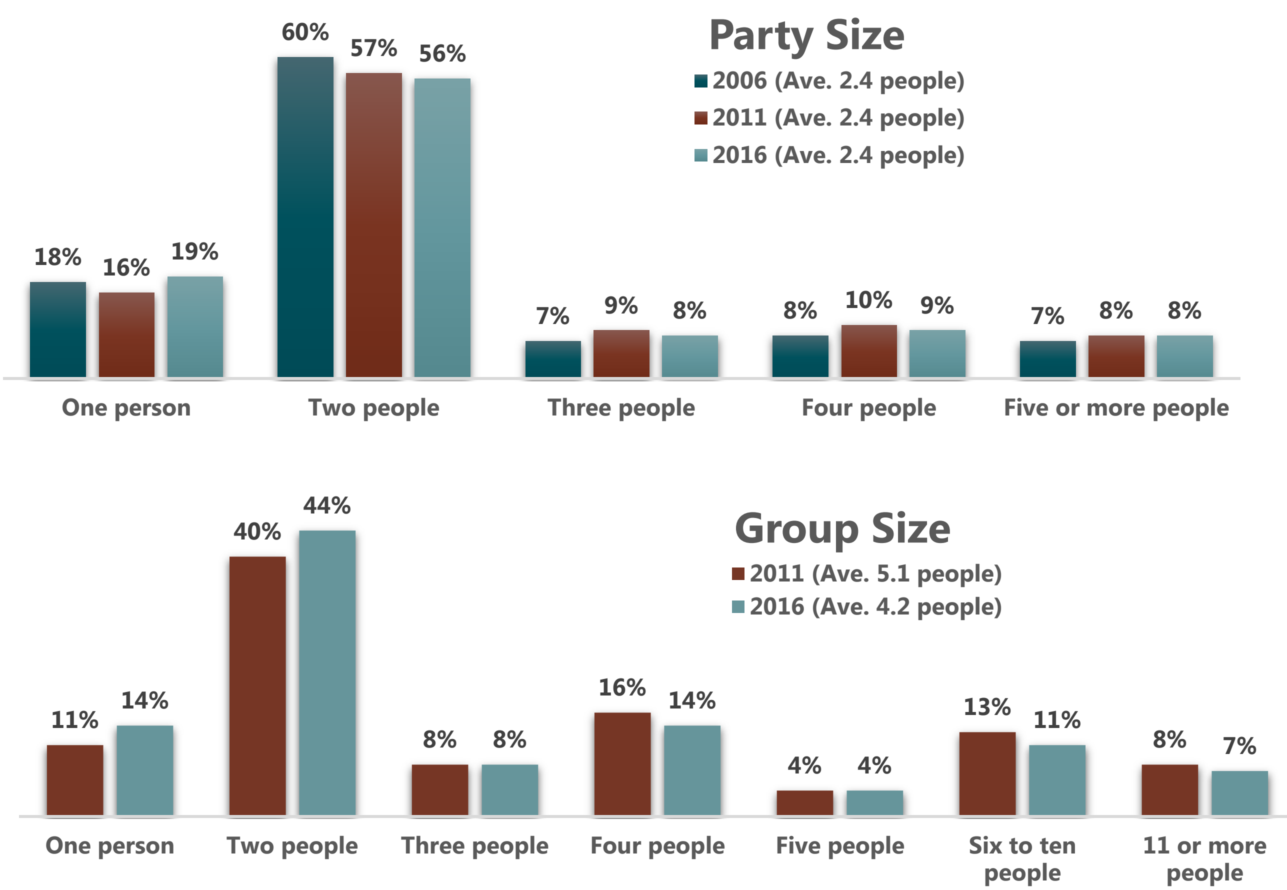


Party and Group Size

Visitors were asked two questions regarding the number of people with whom they were traveling. They were first asked for the number of people with whom they were sharing expenses, such as food, lodging, and transportation. The second question asked for the number of people traveling in the respondent's group, including any friends or family they were traveling with (regardless of sharing expenses).

- Alaska visitors most commonly traveled in two-person parties, representing over half of the market (56 percent). One out of five visitors (19 percent) were traveling solo. The average party size was 2.4 people.
- Average party size has stayed consistent at 2.4 people over the last decade.
- The average group size among Alaska visitors was 4.2 people, representing a decrease from 2011 (5.1 people).
- Nearly one-fifth of visitors (18 percent) were traveling in groups of six or more people, including 7 percent traveling with 11 or more people. A profile of Group Travelers (visitors traveling in groups of six or more) is provided in *Section 16*.

CHART 7.5 - Party and Group Size
All Visitors, 2006, 2011, and 2016 (%)



Transportation Market

- Cruise passengers report larger average party size and group size (2.6 and 5.1 people, respectively) compared to air visitors (2.2 and 3.2) and highway/ferry visitors (2.0 and 2.5).
- Average party size among cruise visitors was consistent at 2.6 people between 2011 and 2016, up from 2.5 in 2006. Over the same time period, highway/ferry visitors' average party size decreased, from 2.3 to 2.2 to 2.0. Air visitors' average party size fluctuated from 2.1 to 2.3 to 2.2.
- Average group size decreased between 2011 and 2016 for both the air market (from 3.6 to 3.2 people) and the cruise market (from 6.3 to 5.1 people). Highway/ferry visitors' average group size increased from 2.4 to 2.5 people.

TABLE 7.5 – Party and Group Size
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Party Size									
One	39	33	37	7	6	7	12	17	23
Two	38	39	40	72	68	66	66	62	63
Three	8	11	9	5	7	8	10	11	7
Four	9	9	7	8	11	11	8	6	5
Five or more	6	8	7	8	8	9	3	4	2
Average party size	**2.1**	**2.3**	**2.2**	**2.5**	**2.6**	**2.6**	**2.3**	**2.2**	**2.0**
Group Size									
One	n/a	24	29	n/a	2	4	n/a	15	22
Two	n/a	32	34	n/a	43	49	n/a	59	59
Three	n/a	12	10	n/a	5	7	n/a	11	7
Four	n/a	13	11	n/a	19	16	n/a	9	7
Five	n/a	5	4	n/a	3	4	n/a	2	1
Six to ten	n/a	9	8	n/a	16	13	n/a	4	2
Eleven or more	n/a	4	4	n/a	12	9	n/a	<1	2
Average group size	n/a	**3.6**	**3.2**	n/a	**6.3**	**5.1**	n/a	**2.4**	**2.5**

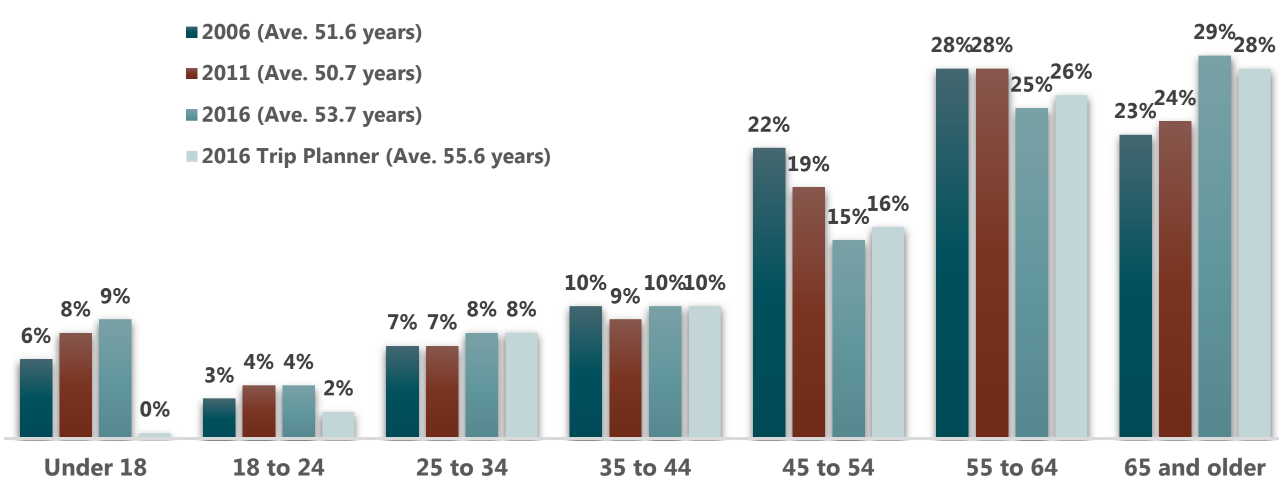
Note: This "group size" question was not asked in the 2006 survey.

Age and Gender

Visitors were asked to report both their own age, and the age and gender of each party member. A new question was added to the 2016 survey: after reporting everyone in their party, the respondent was asked which of the party members did most of the planning for their Alaska trip. Results to both sets of questions are presented in the chart below

- Alaska visitors averaged 53.7 years of age in summer 2016. The most common age group was 65 and older (29 percent), followed by 55 to 64 (25 percent), then 45 to 54 (15 percent).
- The average age of Trip Planners was 55.6 years old, higher than the overall party, but not surprising considering that children under 18 are unlikely to have planned their party's trip.
- The average age of Alaska visitors has fluctuated over the last decade: from 51.6 years in 2006, to 50.7 years in 2011, to 53.7 years in 2016.
- The 45 to 54 age group decreased over the last decade, from 22 percent in 2006, to 19 percent in 2011, to 15 percent in 2016, or 7 percent total. Over the same time period, the 65 and older age group increased by 6 percent (from 23 to 24 to 29 percent) and the under-18 age group increased by 3 percent (from 6 to 8 to 9 percent). Between 2011 and 2016, the 55 to 64 age group fell from 28 percent to 25 percent.

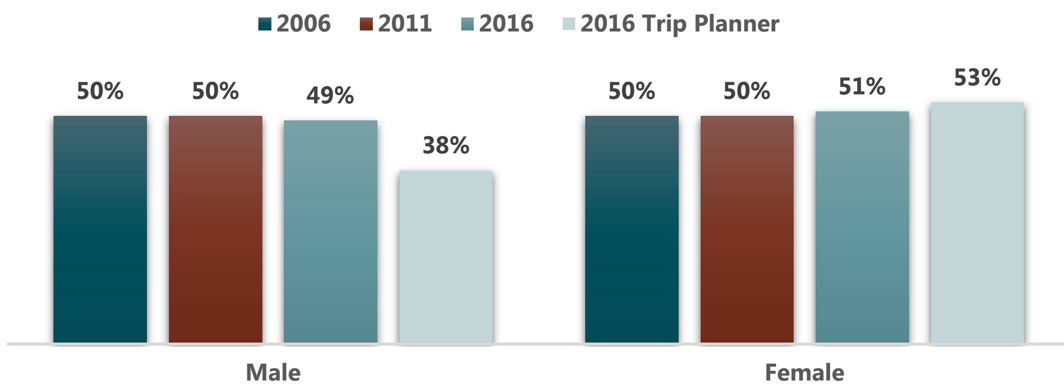
CHART 7.6 – Age of All Party Members; Trip Planner Age (2016 only)
All Visitors, 2006, 2011, and 2016



Note: Trip Planner was only asked in 2016.

- The male/female split of Alaska visitors has been remarkably even over the last decade: from 50/50 in 2006 and 2011, and 49/51 in 2016. Considering trip planners only, they are more likely to be female than male, at 53/38. This figure excludes 9 percent for whom the question didn't apply because someone outside of the party did the trip planning.

CHART 7.7 – Gender of All Party Members; Trip Planner Gender (2016 only)
All Visitors, 2006, 2011, and 2016



Note: Trip Planner was only asked in 2016.

Transportation Market

- Cruise visitors reported the highest average age at 56.7 years old, followed by highway/ferry at 54.8 years old, and air at 49.4 years old.
- Trip planners were slightly older for each market: 58.4 years old among cruise visitors, 55.1 years old among highway/ferry visitors, and 51.4 years old among air visitors.
- The average age of cruise passengers fell slightly from 2006 to 2011 (from 53.3 to 52.3), then climbed to 56.7 in 2016. Air and highway ferry markets also reported small decreases in 2011, then increases in 2016: from 48.0 to 47.7 to 49.4 years for the air market, and from 52.5 to 51.8 to 54.8 years for the highway/ferry market.
- Air and highway/ferry visitors were more likely to be male (57 and 55 percent, respectively) when compared to cruise visitors (44 percent).
- Trip planning gender varied according to market. Cruise passengers were more likely to have female trip planners (62 versus 31 percent), while both air and highway/ferry visitors were more likely to have male trip planners (48 versus 42 percent among air visitors, and 50 versus 34 percent among highway/ferry visitors).

TABLE 7.6 - Age and Gender
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Age									
Under 18	7	7	8	6	9	10	7	6	5
18 to 24	5	5	6	2	3	3	4	4	3
25 to 34	10	12	13	6	4	5	7	10	11
35 to 44	15	12	12	8	8	9	9	9	9
45 to 54	22	21	17	23	19	14	15	13	12
55 to 64	23	26	24	31	29	25	24	28	26
65 and older	18	16	20	25	28	34	33	29	34
Average age – All Visitors	**48.0**	**47.7**	**49.4**	**53.3**	**52.3**	**56.6**	**52.5**	**51.8**	**54.8**
Average age – Trip Planner	**n/a**	**n/a**	**51.4**	**n/a**	**n/a**	**58.4**	**n/a**	**n/a**	**55.1**
Gender – All Visitors									
Male	60	57	57	44	45	44	53	55	55
Female	40	43	43	56	55	56	47	45	45
Gender – Trip Planner									
Male	n/a	n/a	48	n/a	n/a	31	n/a	n/a	50
Female	n/a	n/a	42	n/a	n/a	62	n/a	n/a	34
Others planned	n/a	n/a	10	n/a	n/a	8	n/a	n/a	16

Note: Age and gender data reflect the entire traveling party, not just the respondent.
Trip planner results were not collected in 2006 or 2011.

Supplemental Analysis: U.S. Population by Age Group Compared to Alaska Visitors

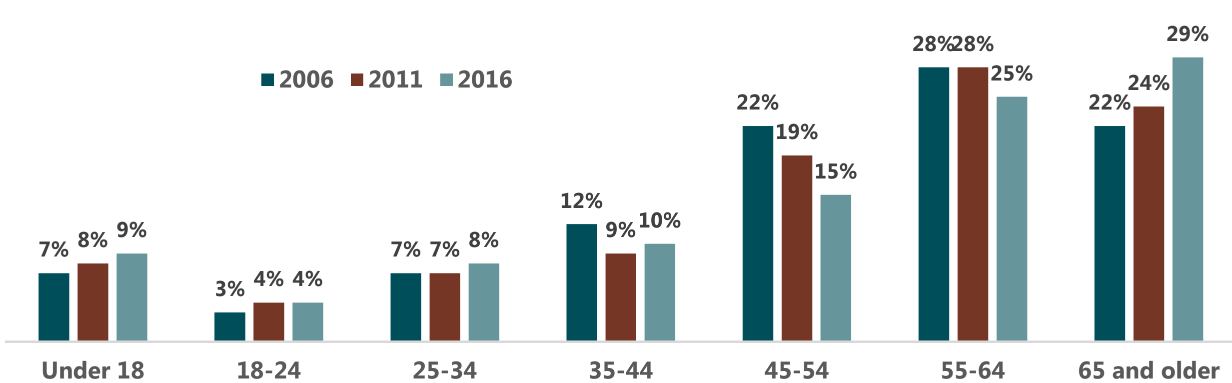
The first chart below shows U.S. population distribution by age group over the three AVSP years of 2006, 2011, and 2015 (the most recent year available), according to U.S. Census data. The second chart shows Alaska visitor distribution for 2006, 2011, and 2016. While the AVSP data includes non-U.S. residents, the data should be comparable, as U.S. residents accounted for 84 percent of all Alaska visitors. In addition, the average ages of Canadian and other international visitors (53 and 55 years old, respectively) was very close to the average age of all visitors (54 years old).

- Compared to the overall U.S. population, Alaska visitors tend to be much older: 13 percent of 2016 Alaska visitors were under 25 in 2016, compared to 33 percent of the 2015 U.S. population. Over half (54 percent) were 55 and older, compared to 28 percent of the 2015 U.S. population.
- Alaska's visitor population in terms of age group shows slightly more fluctuation over time than the U.S. population. The 65+ population increased in both groups between 2006 and 2016: from 12 to 15 percent among U.S. residents, and from 22 to 29 percent among Alaska visitors. On the other end of the age spectrum, those under 18 fell from 25 to 23 percent among U.S. residents, while rising from 7 to 9 percent among Alaska visitors.

CHART 7.8 - U.S. Population by Age Group 2006, 2011, and 2015 (%)

Source: U.S. Census.

CHART 7.9 - Alaska Visitors by Age Group 2006, 2011, and 2016 (%)

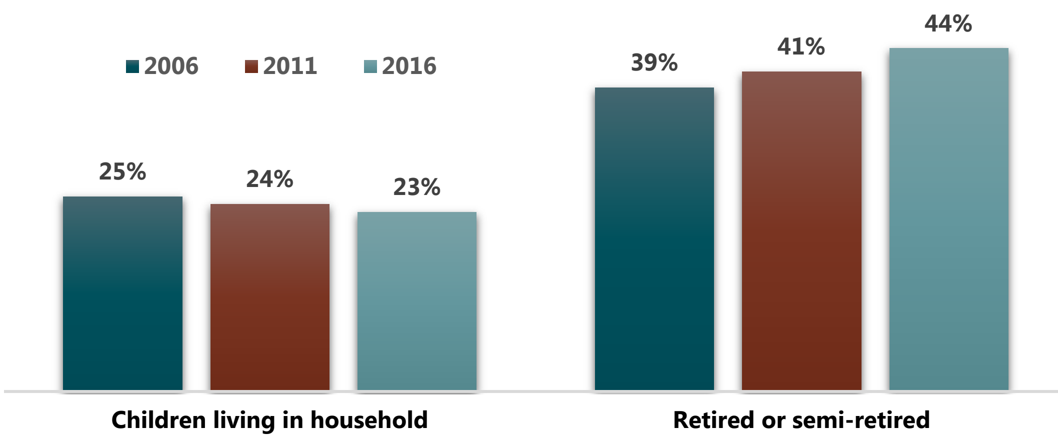


Children and Retirement Status

Visitors were asked two questions to help characterize their household: whether they had children living in their household, and whether they were retired/semi-retired.

- Nearly one-quarter of visitors (23 percent) said they had children living in their household, down slightly from 25 percent in 2006 and 24 percent in 2011.
- Nearly half of visitors (44 percent) said they were retired or semi-retired, up from 39 percent in 2006 and 41 percent in 2011.

**CHART 7.10 - Children Living In Household; Retirement Status
All Visitors, 2006, 2011, and 2016**



Transportation Market

- Rates of children in the household were higher among cruise visitors (22 percent) and air visitors (26 percent) than among highway/ferry visitors (14 percent). These rates have only shifted by 1 to 3 percent over the last decade.
- Highway/ferry and cruise visitors had higher rates of retirement at 55 percent and 51 percent, respectively, when compared with air visitors (31 percent).
- Retirement rates among cruise passengers increased over the last decade, from 43 percent in 2006, to 48 percent in 2011, to 51 percent in 2016. The rate among highway/ferry visitors fluctuated from 59, to 53, to 55 percent. The rate among air visitors inched up between 2011 and 2016: from 28 to 31 percent.

**TABLE 7.10 - Children Living In Household; Retired or Semi-Retired
By Transportation Market, 2006, 2011, and 2016 (%)**

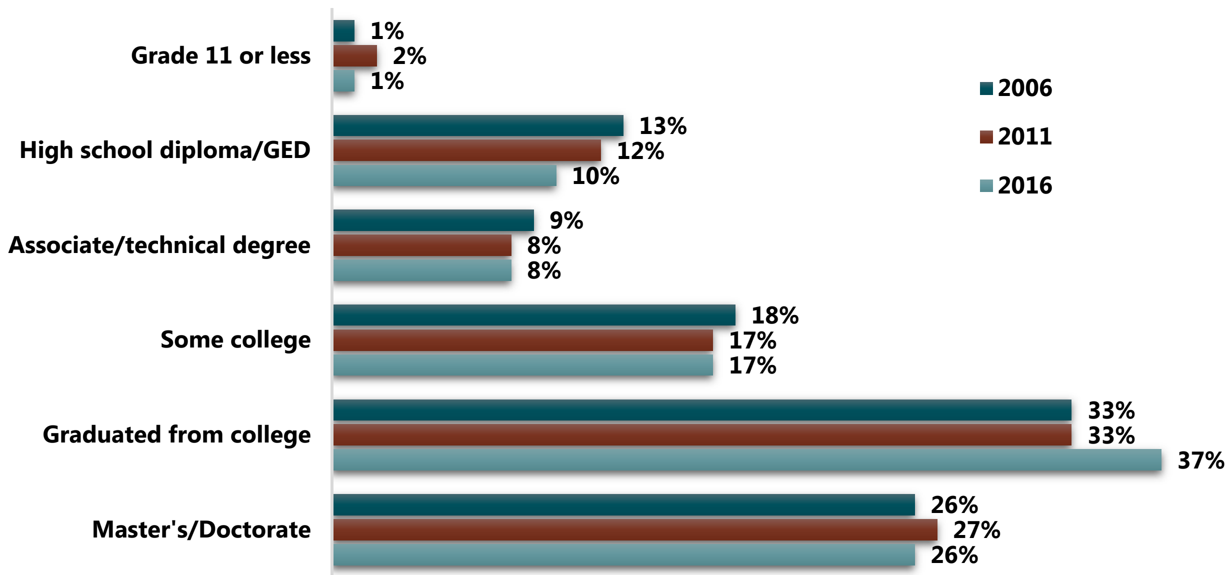
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Children living in household	29	28	26	24	23	22	14	15	14
Retired or semi-retired	29	28	31	43	48	51	59	53	55

Education

Visitors were asked to share the highest level of education they had the opportunity to complete. To make visitors more comfortable, they pointed to the response, rather than speaking it out loud.

- Over one-third of Alaska's visitors (37 percent) had a Bachelor's degree, while another 26 percent had a Master's or Doctorate, for a total college graduate rate of 63 percent.
- Education levels increased slightly between 2011 and 2016, with the college graduation rate increasing from 60 to 63 percent.

CHART 7.11 – Education
All Visitors, 2006, 2011, and 2016



Transportation Market

- Air and cruise visitors show slightly higher college graduation rates (63 and 64 percent, respectively) than highway/ferry visitors (53 percent).
- Cruise passengers' college graduation rate increased from 59 to 64 percent between 2011 and 2016. A bigger shift occurred in the highway/ferry market, where the rate of those with a high school diploma (as their highest educational level) dropped from 18 to 8 percent, while the "some college" rate increased from 12 to 24 percent. Education levels among air visitors were generally consistent over the last decade.

TABLE 7.11 – Education
By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Grade 11 or less	1	1	1	1	2	1	2	4	2
High school diploma/GED	11	10	10	14	12	10	18	18	8
Associate/technical degree	9	9	9	8	8	7	9	10	12
Some college	18	17	16	17	18	17	21	12	24
Graduated from college	33	34	36	33	32	38	29	31	33
Master's/Doctorate	27	28	27	26	27	26	21	24	20
Don't know	<1	1	<1	<1	1	<1	<1	2	1

Household Income

Visitors were asked for their annual pre-tax household income. As with the question about education, respondents pointed to the response rather than speaking out loud for privacy. In cases of international currency, the project team calculated the equivalent amount in U.S. dollars in the survey cleaning process.

- Visitors reported an average income of $114,000 in summer 2016, up from $103,000 in 2006 and $107,000 in 2011. Adjusted for inflation, the 2016 average was about equivalent to the 2011 average.
- While visitors were fairly evenly spread across the income spectrum, the most common income brackets were $75,000-$100,000 (15 percent) and $50,000-$100,000 (12 percent).

Transportation Market

- Cruise passengers reported slightly higher average incomes at $117,000, followed by air visitors ($112,000) and highway/ferry visitors ($92,000).
- The average income among cruise passengers rose by $12,000 over the last decade (from $105,000 to $117,000), while the average income among air visitors rose by $7,000 ($105,000 to $112,000). Highway/ferry visitors' average income fluctuated from $76,000, to $96,000, to $92,000.

CHART 7.12 - Household Income
All Visitors, 2006, 2011, and 2016

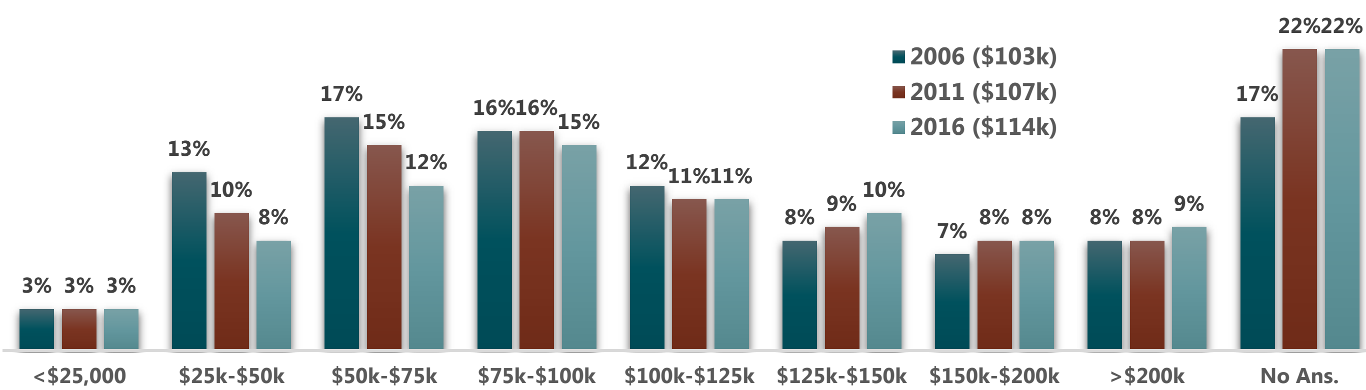


TABLE 7.12 - Household Income
By Transportation Market, 2006, 2011, and 2016 (%)

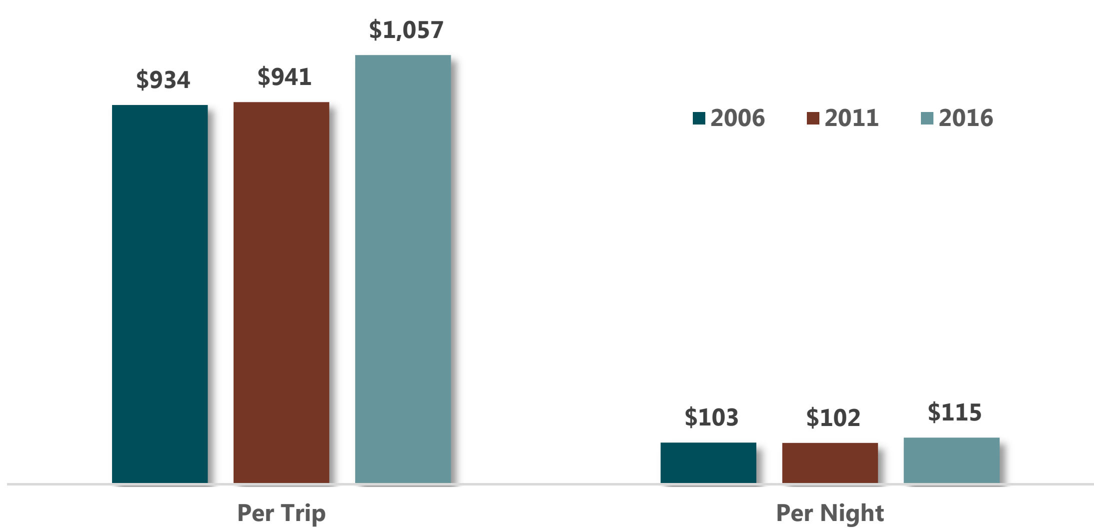
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Less than $25,000	4	4	3	2	2	2	3	3	5
$25,000 to $50,000	11	10	10	12	10	7	26	11	13
$50,000 to $75,000	17	16	14	16	14	10	19	14	14
$75,000 to $100,000	17	15	16	15	16	14	16	19	19
$100,000 to $125,000	12	11	12	13	11	11	8	10	11
$125,000 to $150,000	11	9	11	8	9	9	3	8	8
$150,000 to $200,000	8	9	8	7	7	7	3	6	4
Over $200,000	8	9	10	8	7	9	3	4	4
Don't know/Refused	13	17	13	19	24	29	19	26	22
Average income	**$105,000**	**$108,000**	**$112,000**	**$105,000**	**$108,000**	**$117,000**	**$76,000**	**$96,000**	**$92,000**

Spending Per Person

The following chart shows how much visitors spent on their entire Alaska trip, not including spending on transportation used to enter or exit the state (such as air and ferry tickets) or cruise package spending. This data is divided by party size to arrive at a per-person average.

- Alaska visitors spent an average of $1,057 per person on their Alaska trip, not including the cost of transportation to enter or exit the state, or any cruise or cruise/tour packages. This average is 12 percent above the average reported in 2011, and 13 percent above the 2006 average. After adjusting for inflation, 2016 per-trip spending increased by 4 percent from 2011.
- Visitors spent an average of $115 per person, per night, up 13 percent from $102 in 2011 and 12 percent from $103 in 2006.

CHART 7.13 - Visitor Expenditures in Alaska, Per Person, Per Trip and Per Night Excluding Transportation to/from Alaska All Visitors, 2006, 2011, and 2016 Intercept Respondents



Transportation Market

- Air visitors reported the highest average per-person spending at $1,674, followed by highway/ferry visitors at $990 and cruise visitors at $624. (Cruise visitors spent an additional $2,437, on average, on their cruise package; see table below.)

- Air visitors also spent the highest on a per-night basis, at $167 per person, followed by highway/ferry visitors at $83 and cruise visitors at $74.

- Air visitors' average spending increased over the last decade from $1,376 in 2006, to $1,455 in 2011, to $1,674 in 2016. Cruise visitors' spending decreased slightly, from $636, to $632, to $624. Highway/ferry visitors' spending decreased, from $1,310, to $1,021, to $990.

- After adjusting for inflation, 2016 average air per-trip spending was up by 6 percent from 2011; cruise per-trip spending was down 9 percent; and highway/ferry per-trip spending was down by 10 percent.

TABLE 7.13 - Visitor Expenditures in Alaska, Per Person, Overall Excluding Transportation to/from Alaska By Transportation Market, 2006, 2011, and 2016 (%)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Less than $500	35	30	28	57	58	50	37	37	45
$501 - $1,000	22	20	19	20	21	21	23	22	18
$1,001 - $2,500	24	25	26	9	9	9	23	18	20
$2,501 - $5,000	8	11	12	2	2	1	8	5	6
Over $5,000	3	3	5	<1	1	<1	2	1	2
Don't know	7	11	9	12	10	18	6	16	9
Average per person, per night	**$146**	**$148**	**$167**	**$79**	**$74**	**$74**	**$70**	**$77**	**$83**
Average per person, per trip	**$1,376**	**$1,455**	**$1,674**	**$636**	**$632**	**$624**	**$1,310**	**$1,021**	**$990**

Notes: This data is based to intercept respondents only. Spending on cruise packages and ferry tickets to enter/exit state is excluded.

Cruise and Ferry Package Spending

- Cruise passengers reported spending an average of $2,437 per person on their cruise or cruise/tour package, up from $1,897 in 2006 and $2,173 in 2011. (These results are based only to passengers who reported their package price not including airfare.)

- Ferry passengers reported spending an average of $628 per person on their ferry tickets, up from $551 in 2006 and $412 in 2011.

TABLE 7.14 - Visitor Expenditures on Cruise Package and Ferry Tickets, Per Person, 2006, 2011, and 2016 Base: Cruise and Ferry Passengers

	CRUISE			FERRY		
	2006	2011	2016	2006	2011	2016
Average per person	$1,897	$2,173	$2,437	$551	$412	$628

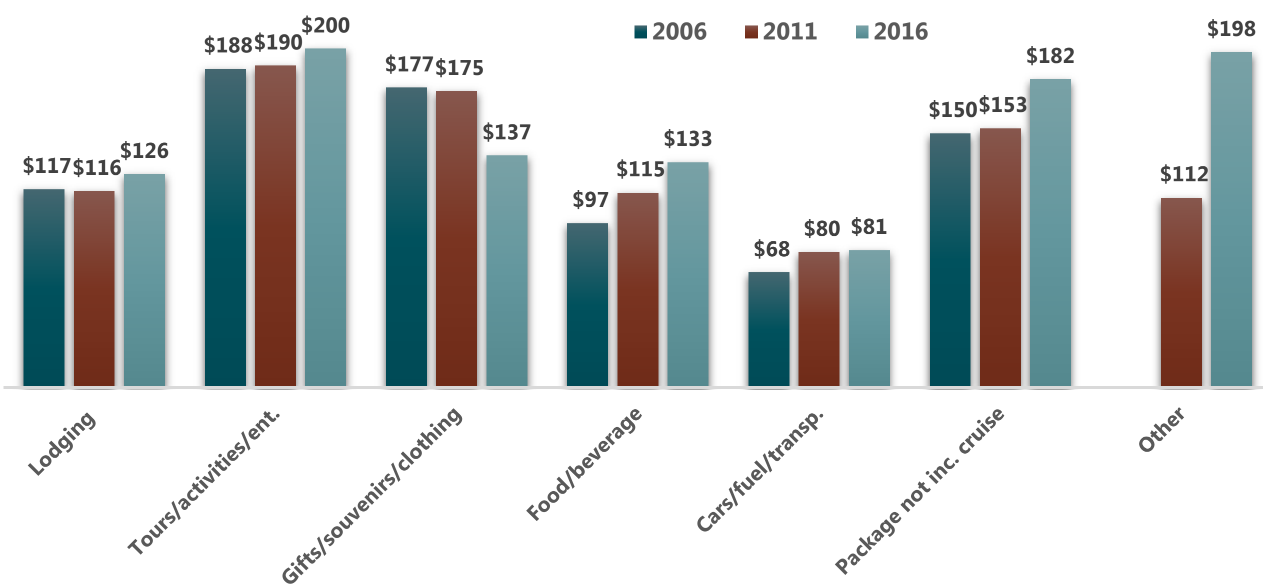
Notes: This data is based to intercept respondents only. Average cruise package price is based only to passengers who reported package price not including airfare.

Spending by Category

The following chart shows average, per-person, per-trip spending by spending category. On the survey, after being asked to estimate the total spending in Alaska, respondents were asked to estimate spending in six different categories. The "other" category represents spending that cannot be attributed to a particular category in a community. Because the methodology changed in 2011 for capturing "other" expenses, there is no comparable category for 2006.

- The category representing the highest per-person spending was tours/activities/entertainment, at $200 per person, followed by packages (not including cruise packages) at $182 per person, gifts/souvenirs/clothing at $137 per person, food/beverage at $133 per person, lodging at $126 per person, and cars/fuel/transportation at $81 per person. The "other" category represented $198 per person.
- Between 2011 and 2016, the largest changes by category were in gifts/souvenirs/clothing, which fell from $175 to $137, and packages (not including cruises), which increased from $153 to $182. "Other" spending increased significantly, from $112 and $198. These changes are discussed in more detail in the following section.

CHART 7.15 - Visitor Spending in Alaska, Per Person, by Category
Excluding Transportation to/from Alaska
All Visitors, 2006, 2011, and 2016



Transportation Market

The table below shows average spending by category, per person, by transportation market.

- Air visitors showed much higher rates of per-person spending for most categories, compared with cruise and highway/ferry passengers. They spent an average of $286 per person on lodging, compared with $22 among cruise passengers and $187 among highway/ferry visitors. They spent $243 on food/beverage, compared with $213 among highway/ferry visitors and $56 among cruise visitors. They spent $470 on packages, compared with $0 among cruise passengers and $65 among highway/ferry visitors. (Cruise passengers reported their cruise package spending in a separate question.)
- Cruise passengers' highest spending category was tours/activities/entertainment, where they spent an average of $230. This compares with $162 among air visitors and $143 among highway/ferry visitors. Cruise passengers spent the bulk of their remaining dollars on gifts/souvenirs/clothing at $168, compared with $95 among air visitors and $81 among highway/ferry visitors.
- Highway/ferry visitors' highest spending category was food/beverage ($213), followed by lodging ($187) and cars/fuel/transportation ($179).
- Compared with 2011, spending by air visitors increased for lodging (from $265 to $286); tours (from $144 to $162); food/beverage (from $215 to $243); and packages (from $424 to $470). Retail spending decreased from $108 to $95.
- Cruise visitor spending on tours increased (from $219 to $230), while retail spending decreased (from $220 to $168).
- Highway/ferry spending changed most significantly in the food/beverage category, which increased from $162 to $213. Spending on lodging decreased from $211 to $187.

TABLE 7.15 - Visitor Spending in Alaska, Per Person, by Category Excluding Transportation to/from Alaska By Transportation Market, 2006, 2011, and 2016

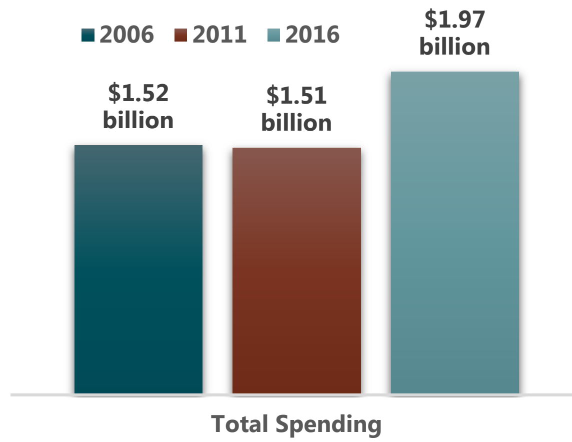
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Lodging	$289	$265	$286	$16	$18	$22	$174	$211	$187
Tours/activities/entertainment	115	144	162	237	219	230	103	144	143
Gifts/souvenirs/clothing	114	108	95	217	220	168	95	92	81
Food/beverage	188	215	243	40	55	56	209	162	213
Cars/fuel/transportation	157	187	188	8	11	9	209	189	179
Package not including cruise	453	424	470	*	0	0	*	61	65
Other	n/a	112	230	n/a	109	139	n/a	162	122

Notes: This data is based to intercept respondents only. Spending on cruise packages and ferry tickets to enter/exit state is excluded.

Total Spending

- Visitor spending on their Alaska trip, excluding transportation costs to travel to and from Alaska, totaled $1.97 billion in summer 2016. That figure includes $1.25 billion in spending by air visitors, $640 million in spending by cruise passengers, and $84 million in spending by highway/ferry visitors. Spending on cruise packages, ferry tickets, and airfare to enter/exit Alaska are excluded.
- Total spending increased by 31 percent between 2011 and 2016. Spending by air visitors increased by 42 percent, while spending by cruise visitors increased by 15 percent, and spending by highway/ferry visitors increased by 18 percent.

CHART 7.16 – Total Visitor Spending in Alaska, Summer 2016



- Adjusting 2011 dollars to 2016 value, total spending increased by 21 percent, including by 32 percent among air visitors, by 6 percent among cruise visitors, and by 9 percent among highway/ferry visitors.

TABLE 7.16 - Total Visitor Expenditures in Alaska Excluding Transportation to/from Alaska By Transportation Market, 2006, 2011, and 2016 ($Millions)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Total Spending	$809	$880	$1,250	$610	$558	$640	$111	$71	$84

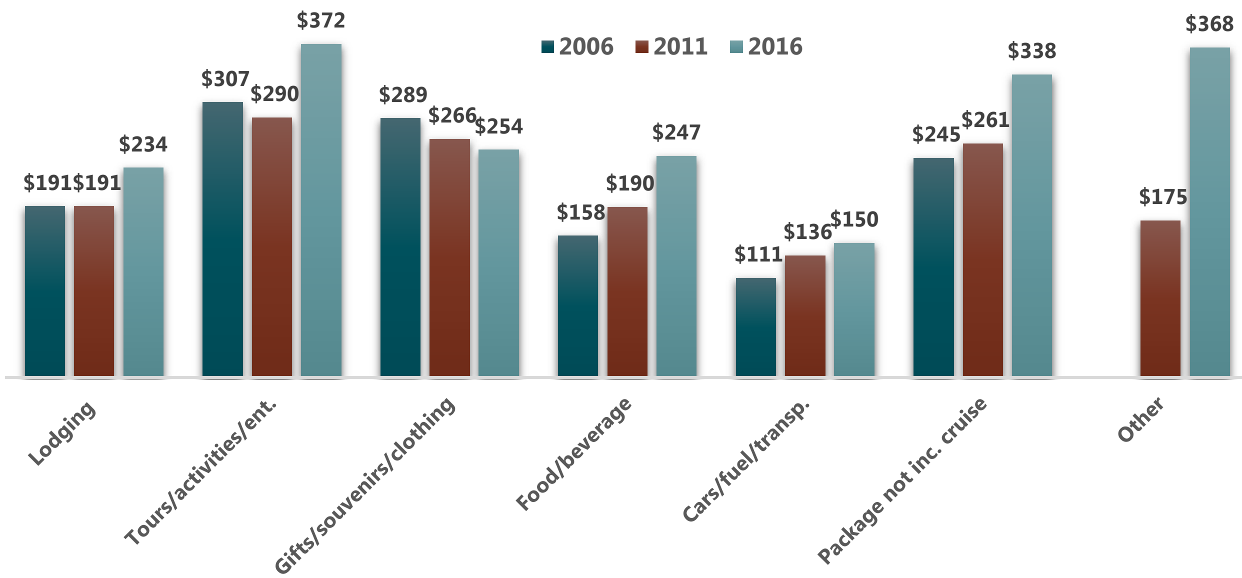
Notes: This data is based to intercept respondents only. Spending on transportation to enter/exit state is excluded.

Total Spending by Category

The chart below shows total spending by spending category. These figures are determined by multiplying average spending by visitor volume.

- The largest total spending category (naturally mirroring the average per-person order) was tours/activities/entertainment ($372 million), followed by non-cruise packages ($338 million), gifts/souvenirs/clothing ($254 million), food/beverage ($247 million), lodging ($234 million), and cars/fuel/transportation ($150 million). Unattributed spending totaled $368 million.
- Changes in total spending reflected changes in per-person spending, discussed in the previous section.

CHART 7.17 - Total Visitor Spending in Alaska, by Category
Excluding Transportation to/from Alaska
All Visitors, 2006, 2011, and 2016 ($Millions)



Transportation Market

- Air visitors' total spending was highest for non-cruise packages ($351 million), followed by lodging ($214 million) and food/beverage ($182 million).
- Cruise visitors' total spending was mostly concentrated in tours ($236 million) and gifts/souvenirs/clothing ($172 million).
- Because of their small portion of the market (5 percent), highway/ferry visitors' total spending was much lower by category, compared to air and cruise visitors. Spending was mostly concentrated in food/beverage ($18 million), lodging ($16 million), and cars/fuel/transportation ($15 million).

TABLE 7.17 - Total Visitor Spending in Alaska, by Category
Excluding Transportation to/from Alaska
By Transportation Market, 2006, 2011, and 2016 ($Millions)

	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Lodging	$170	$160	$214	$15	$16	$23	$15	$15	$16
Tours/activities/entertainment	68	87	121	227	193	236	9	10	12
Gifts/souvenirs/clothing	67	65	71	208	194	172	8	6	7
Food/beverage	111	130	182	38	49	57	18	11	18
Cars/fuel/transportation	92	113	140	8	10	9	18	13	15
Package not including cruise	266	256	351	*	-	-	*	4	5
Other	n/a	68	172	n/a	96	143	n/a	11	10

Notes: This data is based to intercept respondents only. Spending on transportation to enter/exit state is excluded.

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Section 8: Summary Profiles – Trip Purpose

McDowell GROUP

Summary Profiles: Trip Purpose

In this chapter, the overall visitor market is examined by trip purpose. Over three-quarters of visitors (79 percent) indicated the primary purpose of their trip was for vacation/pleasure, while 13 percent were visiting friends or relatives (VFRs). The remaining 8 percent travelled for business-related purposes. Definitions for each of these markets and sample sizes are provided in the table below.

TABLE 8.1 - Market Definition and Sample Size
Trip Purpose

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Vacation/pleasure	Main purpose of trip is vacation or pleasure	79%	1,466,000	4,138	±1.5%
Visiting friends/relatives	Main purpose of trip is to visit friends or relatives	13%	240,000	1,112	±2.9%
Business only/ business and pleasure	Main purpose of trip is business only or business and pleasure	8%	152,000	676	±3.8%

Markets defined by trip purpose differ significantly from each other.

- While 79 percent of vacation/pleasure visitors purchased a multi-day package, few VFRs or business travelers purchased tour packages (4 percent and 5 percent, respectively).
- Almost three-quarters (72 percent) of vacation/pleasure visitors were cruise visitors, 24 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 most likely to travel between communities by rental vehicle or by air (30 and 27 percent did so, respectively). Vacation/pleasure travelers were most likely to travel within Alaska by tour bus/van and/or train (35 percent did so). Almost half (45 percent) of VFR travelers used personal vehicles to travel within the state.
- Business travelers reported staying in Alaska longer than those traveling for other purposes, averaging 11.9 nights. VFR travelers stayed an average of 10.4 nights, followed by vacation/pleasure travelers at 8.7 nights.
- Nearly 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 with friends and family at 76 percent (compared to 4 percent of vacation/pleasure and 16 percent of business visitors).
- Those traveling for vacation/pleasure were significantly more likely to visit Southeast Alaska (80 percent), compared to 19 percent of VFRs and 17 percent of business travelers. VFRs and business

travelers were more likely to visit Southcentral Alaska (75 percent and 76 percent, respectively), versus 45 percent of vacation/pleasure 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 40 percent of business travelers reported shopping, compared to 80 percent of vacation/pleasure travelers and 66 percent of VFRs.

- 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 31 percent of vacation/pleasure travelers. Similarly, more than two-thirds of VFRs and business travelers have been to Alaska previously, while just 32 percent of vacation/pleasure travelers have prior experience in the state. Among repeat travelers, VFRs have the highest average previous vacation experience, at 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, 48 percent of VFRs and 49 percent of business travelers booked their trip between April and June of 2016, compared to only 24 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 (80 percent). Airline websites were by far the most common online tool used to book travel.

- One in five vacation/pleasure parties visited the official State of Alaska website (travelalaska.com) while planning their trip. Fewer VFR (14 percent) and business (10 percent) travelers used the website. Use of the official State of Alaska Vacation Planner followed a similar pattern, with 13 percent of vacation/pleasure, 8 percent of VFR, and 5 percent of business travelers reporting receiving the Planner.

- Nearly two-thirds of business travelers and over half of VFR travelers were from the Western U.S., compared to only a third of vacation/pleasure travelers. For all trip purpose markets, the next most popular regions of origin were Southern U.S. and Midwestern U.S.

- VFRs averaged the lowest group size of 2.8 people, compared to 2.9 people among business and 4.6 people among vacation/pleasure travelers.

- Business travelers reported the highest average annual income of $123,000, versus vacation/pleasure travelers reporting $117,000 and VFRs reporting $90,000.

- Business travelers spent the most in Alaska at $1,362 per person per trip, on average. Vacation/pleasure travelers spent $1,085, and VFRs spent the least at $743.

TABLE 8.2 - Trip Purpose and Packages
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Trip Purpose				
Vacation/pleasure	79	100	-	-
Visiting friends or relatives	13	-	100	-
Business	5	-	-	61
Business and pleasure	3	-	-	39
Purchased multi-day package (including cruise)				
Yes	64	79	4	5
Package type (Base: non-cruise, purchased package)				
Fishing lodge	49	50	*	*
Rail package	11	12	*	*
Wilderness lodge	10	11	*	*
Adventure tour	9	9	*	*
Motorcoach tour	8	7	*	*
Rental car/RV package	6	6	*	*
Hunting	2	2	*	*

*Sample size too small for analysis

TABLE 8.3 - Transportation Modes
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Transportation Market				
Cruise	55	72	2	2
Air	40	24	91	95
Highway/ferry	5	5	6	3
Used to Travel Between Communities				
Tour bus/van	15	18	1	4
Rental vehicle	14	12	18	30
Alaska Railroad	14	17	4	3
Personal vehicle	9	4	45	10
Air	9	7	11	27
Rental RV	2	2	2	<1
State ferry	2	2	2	2
Personal RV	1	1	3	<1

TABLE 8.4 - Length of Stay, Destinations and Lodging Type
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Average length of stay in Alaska	9.2	8.7	10.4	11.9
Regions Visited				
Southeast	67	80	19	17
Southcentral	52	45	75	76
Interior	29	29	31	25
Southwest	4	4	5	11
Far North	2	1	2	6
Destinations Visited, Top 10				
Juneau	61	74	10	12
Ketchikan	58	72	8	6
Skagway	48	60	3	3
Anchorage	47	41	69	71
Glacier Bay Nat'l Park	29	36	1	1
Denali Nat'l Park	23	26	15	6
Seward	23	25	21	12
Fairbanks	17	16	20	22
Hoonah/Icy Strait Point	13	16	1	1
Talkeetna	11	12	9	6
Lodging Types Used				
Cruise ship	57	71	2	2
Hotel/motel	37	35	29	70
Friends/family	15	4	76	16
Lodge	15	17	7	8
Campground/RV	6	6	9	2
B&B	4	4	6	4
Vacation rental	3	2	6	4
Wilderness camping	2	2	3	3
State ferry	1	1	1	1

TABLE 8.5 - Visitor Activities – Top 10
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Shopping	75	80	66	40
Wildlife viewing	45	45	56	34
Cultural activities	39	43	33	17
Day cruises	39	46	20	9
Hiking/nature walk	34	32	48	32
Train	32	40	5	3
City/sightseeing tours	31	37	12	7
Fishing	16	14	33	14
Flightseeing	13	16	6	4
Tramway/gondola	13	15	6	4

TABLE 8.6 - Satisfaction Ratings
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Satisfaction with overall Alaska experience				
Very satisfied	75	76	73	64
Satisfied	23	22	24	32
Compared to expectations				
Much higher	29	30	22	*
Higher	36	36	34	*
About as expected	32	30	43	*
Value for the money, compared to other destinations				
Much better	15	16	15	*
Better	23	24	21	*
About the same	45	45	46	*
Likelihood to recommend and return to Alaska				
Very likely to recommend Alaska as a vacation destination	79	80	80	71
Very likely to return to Alaska in the next five years	40	31	70	73

*Business visitors were screened out of these questions.

TABLE 8.7 - Previous Alaska Travel
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Been to Alaska before	40	32	68	70
Average # of vacation trips (base: repeat travelers)	4.1	3.8	6.0	3.3
Previously traveled in Alaska by cruise ship	16	18	11	10

TABLE 8.8 - Trip Planning
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Trip Decision, by Quarter				
Before July 2015	14	16	6	3
July-Sept 2015	17	19	11	7
Oct-Dec 2015	17	19	11	6
Jan-Mar 2016	23	23	29	17
Apr-Jun 2016	20	16	33	40
July-Sept 2016	8	6	10	26
Trip Booking, by Quarter				
Before July 2015	6	7	1	<1
July-Sept 2015	11	13	2	2
Oct-Dec 2015	15	18	7	3
Jan-Mar 2016	27	29	25	11
Apr-Jun 2016	29	24	48	49
July-Sept 2016	13	10	18	35
Internet and Travel Agent Usage				
Used internet	68	66	84	68
Booked over internet	58	53	80	60
Used travelalaska.com	18	20	14	10
Received Official State Vacation Planner	12	13	8	5
Booked through travel agent	35	42	5	15
Other Sources – Top 10				
Friends/family	51	47	76	45
Prior experience	23	19	42	35
Cruise line	22	28	2	2
Brochures	15	16	12	10
AAA	8	9	4	1
Other travel/guide book	6	7	3	3
Tour company	5	6	<1	2
Magazine	5	5	4	3
Television	4	5	3	2
Milepost	4	4	4	2

TABLE 8.9 - Top 10 Websites/Apps Used to Plan/Book
Trip Purpose (%)

	All Visitors		Vacation/ Pleasure		Visiting Friends/ Relatives		Business Only/ Business & Pleasure	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	46	46	70	69	56	59
Cruise line websites	35	27	45	36	3	2	1	<1
Google	28	4	30	4	18	2	19	5
Trip Advisor	23	3	28	4	9	2	12	2
Expedia	14	10	14	9	15	12	10	8
Hotel/lodge/RV Park	11	10	12	9	8	6	17	19
Tour company websites	11	8	13	9	5	3	6	4
Car/RV rental websites	10	9	9	8	10	7	18	17
Travelocity	7	2	8	2	7	4	5	3
Facebook	7	<1	8	<1	3	<1	5	<1

TABLE 8.10 - Demographics
Trip Purpose (%)

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Origin				
Western US	38	33	55	64
Southern US	21	22	19	17
Midwestern US	15	16	15	8
Eastern US	10	10	7	6
Canada	7	9	1	2
Other International	9	11	3	3
Other Demographics				
Average party size	2.4	2.5	2.1	1.5
Average group size	4.2	4.6	2.8	2.9
Male/female	49/51	48/52	49/51	68/32
Average age	53.7	55.2	50.2	45.7
Children in household	23	22	22	38
Retired/semi-retired	44	48	39	11
College graduate	63	65	50	63
Average income	$114,000	$117,000	$90,000	$123,000

TABLE 8.11 – Average Spending in Alaska, Per Person, Per Trip
Excluding Transportation to/from Alaska
Trip Purpose

	All Visitors	Vacation/ Pleasure	Visiting Friends/ Relatives	Business Only/ Business & Pleasure
Average per-trip spending	$1,057	$1,085	$743	$1,362

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Section 9: Summary Profiles - Fly/Drive, Highway, Ferry, and Campground Users

McDowell GROUP

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 9.1 - Market Definition and Sample Size
Fly/Drive, Highway, Ferry, and Campground Users**

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Fly/Drive	Entered and exited Alaska via air; rented vehicle or RV	14%	268,000	1,086	±3.0%
Highway	Entered or exited Alaska via highway	4%	78,000	498	±4.4%
Ferry	Entered or exited Alaska via ferry, or used the ferry to travel between Alaska communities	2%	44,000	481	±4.4%
Campground Users	Spent at least one night in a campground	6%	109,000	613	±3.9%

The fly/drive, highway, and ferry markets are distinct in a number of ways.

- Visitors in all three of these markets were significantly less likely to purchase a multi-day package than the average Alaska visitor. Just 17 percent of ferry, 13 percent of fly/drive, and 3 percent of highway visitors reported purchasing a package.
- Nearly all fly/drive visitors visited Anchorage (92 percent), compared to half of highway and ferry visitors. Only 7 percent of fly/drive visitors visited any part of Southeast Alaska on their trip.
- Nearly half of highway visitors (44 percent) drove down to Haines or Skagway, or otherwise visited Southeast Alaska on their Alaska trip. While 31 percent of highway visitors travelled to Skagway, very few visited Juneau (5 percent) or Ketchikan (3 percent).
- Fly/drive visitors were much more likely to visit Denali National Park and Seward.
- Nearly three-quarters of fly/drive visitors reported participating in wildlife viewing activities. The next most popular activities for this market were shopping and hiking/nature walk.
- Over half of ferry visitors participated in shopping, wildlife viewing, cultural activities, and hiking/nature walk.
- Slightly less than a third of fly/drive, highway, and ferry visitor markets fished while in Alaska.
- Those travelling by ferry stayed in the state an average of 13.9 nights, longer than the other markets and the overall average.

- Over half of highway visitors have traveled to Alaska before, more than over markets and the statewide average. Highway visitors that had been to Alaska before had been an average of 7.7 times, significantly more than repeat visitors in other markets.
- A third of highway visitors hailed from Canada. Ferry and fly/drive visitors were most likely to be from Western U.S. (45 percent).
- Highway visitors were significantly more likely to stay at a campground or RV park, with over half using these facilities versus 15 percent of fly/drive and 23 percent of ferry visitors.
- Fly/drive and ferry visitors were especially likely to use the internet to plan their trip. They were also more likely than the overall market to use travelalaska.com and receive the State's official Vacation Planner.
- While in Alaska, fly/drive and ferry passengers spent almost $2,000 per person, on average, compared to only $936 per highway visitor. Campground users spent an average of $1,466 per person during their Alaska trip.

TABLE 9.2 - Trip Purpose and Packages
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Trip Purpose					
Vacation/pleasure	79	65	79	75	77
Visiting friends or relatives	13	18	17	17	21
Business	5	9	1	3	1
Business and pleasure	3	8	4	5	2
Purchased multi-day package (including cruise)					
Yes	64	13	3	17	8
Package type (Base: non-cruise, purchased package)					
Fishing lodge	49	35	8	28	32
Rail package	11	11	19	13	-
Wilderness lodge	10	12	19	13	19
Adventure tour	9	12	22	13	23
Motorcoach tour	8	4	22	3	4
Rental car/RV package	6	19	8	18	15
Hunting	2	1	-	-	6

TABLE 9.3 - Transportation Modes
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Transportation Market					
Cruise	55	1	1	6	3
Air	40	99	-	52	60
Highway/ferry	5	-	99	42	37
Used to Travel Between Communities					
Tour bus/van	15	6	3	15	4
Rental vehicle	14	88	5	22	14
Alaska Railroad	14	10	3	13	3
Personal vehicle	9	2	39	15	25
Air	9	15	2	32	8
Rental RV	2	13	4	5	29
State ferry	2	4	11	87	8
Personal RV	1	<1	22	5	21

TABLE 9.4 - Length of Stay, Destinations and Lodging Type
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Average length of stay in Alaska	9.2	9.4	11.6	13.9	14.4
Regions Visited					
Southeast	67	7	44	81	26
Southcentral	52	96	59	55	86
Interior	29	55	71	47	71
Southwest	4	6	1	5	4
Far North	2	3	6	5	5
Destinations Visited, Top 10					
Juneau	61	4	5	50	9
Ketchikan	58	1	3	36	7
Skagway	48	1	31	35	14
Anchorage	47	92	49	51	79
Glacier Bay Nat'l Park	29	2	2	8	4
Denali Nat'l Park	23	46	33	36	53
Seward	23	51	28	26	51
Fairbanks	17	28	41	25	37
Hoonah/Icy Strait Point	13	<1	1	3	3
Talkeetna	11	27	16	18	26
Lodging Types Used					
Cruiseship	57	1	1	6	3
Hotel/motel	37	73	30	64	27
Lodge	15	22	5	25	5
VFR	15	15	23	29	28
Campground/RV	6	15	49	23	100
B&B	4	17	5	15	4
Vacation rental	3	10	2	7	3
Wilderness camping	2	4	12	9	9
State ferry	1	<1	6	30	4

TABLE 9.5 - Visitor Activities – Top 10
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Shopping	75	64	62	70	65
Wildlife viewing	45	72	40	60	70
Cultural activities	39	43	34	54	44
Day cruises	39	42	25	36	40
Hiking/nature walk	34	57	35	52	56
Train	32	11	9	21	7
City/sightseeing tours	31	18	14	21	17
Fishing	16	29	28	32	39
Flightseeing	13	17	9	19	12
Tramway/gondola	13	11	3	12	5

TABLE 9.6 - Satisfaction Ratings
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Satisfaction with overall Alaska experience					
Very satisfied	75	71	66	79	70
Satisfied	23	26	30	18	28
Compared to expectations					
Much higher	29	27	29	34	25
Higher	36	40	28	33	33
About as expected	32	29	38	31	36
Value for the money, compared to other destinations					
Much better	15	7	11	16	11
Better	23	18	18	23	24
About the same	45	50	46	42	41
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska as a vacation destination	79	78	75	83	76
Very likely to return to Alaska in the next five years	40	50	52	44	45

TABLE 9.7 - Previous Alaska Travel
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Been to Alaska before	40	45	56	47	45
Average # of vacation trips (base: repeat travelers)	4.1	4.6	7.7	4.7	5.6
Previously traveled in Alaska by cruise ship	16	11	14	10	11

TABLE 9.8 - Trip Planning
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Trip Decision, by Quarter					
Before July 2015	14	8	17	16	12
July-Sept 2015	17	13	15	21	19
Oct-Dec 2015	17	16	9	14	13
Jan-Mar 2016	23	24	17	22	24
Apr-Jun 2016	20	27	30	19	25
July-Sept 2016	8	12	13	8	7
Trip Booking, by Quarter					
Before July 2015	6	1	1	2	1
July-Sept 2015	11	4	3	7	5
Oct-Dec 2015	15	12	5	14	9
Jan-Mar 2016	27	29	9	27	22
Apr-Jun 2016	29	37	42	34	37
July-Sept 2016	13	17	40	16	26
Internet and Travel Agent Usage					
Used internet	68	87	55	75	77
Booked over internet	58	81	34	59	63
Used TravelAlaska.com	18	31	21	31	33
Received Official State Vacation Planner	12	18	21	22	20
Booked through travel agent	35	10	4	19	9
Other Sources – Top 10					
Friends/family	51	51	39	48	49
Prior experience	23	28	30	30	29
Cruise line	22	2	1	3	2
Brochures	15	25	27	30	30
AAA	8	8	13	10	10
Other travel/guide book	6	11	11	15	16
Tour company	5	4	2	6	3
Magazine	5	7	8	10	10
Television	4	3	6	3	3
Milepost	4	10	37	17	31

TABLE 9.9 - Top 10 Websites/Apps Used to Plan/Book
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors		Fly/Drive		Highway		Ferry		Campground Users	
	Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**
Airline websites	50	50	58	59	21	22	44	41	46	47
Cruise line websites	35	27	4	3	3	2	6	6	4	2
Google	28	4	36	9	47	10	35	5	40	7
Trip Advisor	23	3	29	6	25	6	31	7	23	3
Expedia	14	10	19	16	11	7	17	12	15	10
Hotel/lodge/RV Park	11	10	20	18	19	11	20	14	10	7
Tour company websites	11	8	17	13	10	6	15	12	14	9
Car/RV rental websites	10	9	38	35	9	8	12	12	28	26
Travelocity	7	2	7	3	6	2	6	3	5	2
Facebook	7	<1	6	<1	6	1	6	<1	5	<1

TABLE 9.10 - Demographics
Fly/Drive, Highway, Ferry, and Campground Users (%)

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Origin					
Western US	38	45	29	45	33
Southern US	21	19	14	15	19
Midwestern US	15	17	11	12	16
Eastern US	10	9	4	4	9
Canada	7	1	34	10	9
Other International	9	9	8	13	14
Other Demographics					
Average party size	2.4	2.5	2.0	2.2	2.6
Average group size	4.2	3.4	2.7	3.1	3.5
Male/female	49/51	56/44	55/45	54/46	54/46
Average age	53.7	48.7	54.6	55.2	48.5
Children in household	23	28	14	14	22
Retired/semi-retired	44	31	55	51	40
College graduate	63	68	52	67	65
Average income	$114,000	$120,000	$92,000	$108,000	$102,000

TABLE 9.11 – Average Spending in Alaska, Per Person, Per Trip
Excluding Transportation to/from Alaska
Fly/Drive, Highway, Ferry, and Campground Users

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Average per-trip spending	$1,057	$1,948	$936	$1,914	$1,466

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Section 10: Summary Profiles - U.S. Regions and Canada

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Summary Profiles: U.S. Regions and Canada

The North American market is profiled by region in this chapter, including visitors from Western, Midwestern, Southern, and Eastern U.S., as well as Canadian visitors. Definitions for each of the regions and sample sizes are provided in the table below.

TABLE 10.1 - Market Definition and Sample Size
US Regions & Canada

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Western U.S.	From Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, or Wyoming	38%	713,000	2,352	±2.0%
Midwest U.S.	From Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, or Wisconsin	15%	390,000	810	±3.4%
Southern U.S.	From Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, or Virginia, or West Virginia	21%	277,000	1,073	±3.0%
Eastern U.S.	From Connecticut, Delaware, Maine, Massachusetts, Maryland, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, or Washington, D.C	10%	178,000	507	±4.3%
Canada	From Canada	7%	132,000	393	±4.9%

Making up the largest group of North American travelers, those from Western U.S. states differed somewhat compared to those from other regions of the U.S.

- Over half of Western U.S. visitors traveled to and from the state by air, versus approximately one-third of visitors from other U.S. regions. Conversely, two-thirds of visitors from other U.S. regions traveled by cruise, in contrast to just 44 percent of Western U.S. visitors.
- Compared to those from other regions, Western U.S. visitors were more likely to travel to Alaska to visit friends/relatives or for business. The higher VFR rate is reflected in a higher likelihood of staying in private homes.
- While Western U.S. visitors were less likely to purchase a non-cruise multi-day package than those from other regions, those that did purchased fishing lodge packages at a higher rate.
- They were much more likely to book their trip between April and June 2016 than other U.S. visitors. Furthermore, they were less likely to book travel arrangements with a travel agent.
- More than half from this region had been to Alaska previously (54 percent), compared to 26 to 34 percent of other U.S. visitors. Similarly, more than half of Westerners said they were very likely to return to the state in the next five years.

Other U.S. markets were distinct in several ways.

- Eastern and Southern U.S. visitors were slightly more likely to travel by cruise than those from the Midwest and West. It follows that they were also more likely to visit Southeast Alaska.
- U.S. visitors that purchased a non-cruise multi-day package were most likely to purchase a fishing lodge package. For Midwestern U.S. visitors, the next most likely was a rail package (21 percent), whereas wilderness lodge and motorcoach tour packages were the second most popular for Southern and Eastern U.S. visitors, respectively.
- Eastern, Southern, and Midwestern U.S. visitors were more likely to participate in a number of organized activities, including day cruises, city/sightseeing tours, cultural activities, train, and flightseeing.
- Visitors from Eastern U.S. states reported the highest annual income compared to their North American counterparts, at an average of $123,000. Similarly, they were the most likely to be college graduates.
- Eastern and Midwestern U.S. visitors travelled in the slightly larger groups, averaging 4.8 to 5.2 people compared to 3.5 to 4.2 for visitors from other parts of North America.
- Eastern U.S. visitors reported the lowest rate of previous vacations in Alaska, with just 26 percent reporting prior trips.
- Among U.S. regions, Midwestern visitors reported spending slightly more in Alaska on average: $1,219 per person. This compares with $1,152 among Eastern visitors, $1,055 among Southern visitors, and $1,022 among Western visitors.

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

- Nearly all Canadian visitors traveled to Alaska for the purpose of vacation/pleasure (95 percent).
- Three-quarters of Canadian visitors traveled by cruise ship, the highest among North American travelers. Twenty percent traveled by highway or ferry, also much higher than any U.S. region. They were less likely to travel by air at 5 percent.
- Due to the high proportion of cruise travelers, Canadians were more likely to visit the Southeast regions compared to total visitors. They were also less likely to visit the Southcentral or Interior regions.
- Canadian visitors reported the shortest average length of stay in the state, at 7.1 nights.
- Though seven in ten Canadian visitors reported being very satisfied with their Alaska trip, these levels were slightly lower than those for U.S. visitors.
- Canadians that had been to Alaska previously had been more often (5.6 trips on average) than other North American travelers.
- They were the least likely to use the internet compared to other regions. Only half used the internet to research their vacation and just 35 percent booked a portion of their trip online.

- Canadians spent much less per person during their Alaska trip – $470 on average – compared to other North American visitors ($1,022 to $1,219). The lower average is likely attributable to day visitors from the Yukon.

TABLE 10.2 - Trip Purpose and Packages
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Trip Purpose						
Vacation/pleasure	79	68	83	81	86	95
Visiting friends/rel.	13	18	13	12	9	3
Business only	5	9	2	4	3	1
Business/pleasure	3	5	3	3	2	1
Purchased multi-day package (including cruise)						
Yes	64	52	68	70	72	75
Package type (Base: non-cruise, purchased package)						
Fishing lodge	49	68	40	38	35	5
Rail package	11	6	21	11	14	-
Wilderness lodge	10	6	10	18	11	38
Adventure tour	9	7	7	12	12	5
Motorcoach tour	8	5	5	12	16	38
Rental car/RV package	6	5	7	2	3	-
Hunting	2	1	3	3	6	-

TABLE 10.3 - Transportation Modes
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Transportation Market						
Cruise	55	44	59	66	65	75
Air	40	52	37	31	33	5
Highway/ferry	5	4	4	3	2	20
Used to Travel Between Communities						
Tour bus/van	15	9	20	18	20	9
Rental vehicle	14	17	16	12	14	4
Alaska Railroad	14	8	18	17	21	6
Personal vehicle	9	12	10	8	9	6
Air	9	12	9	7	9	3
Rental RV	2	2	3	2	2	<1
State ferry	2	2	2	1	1	3
Personal RV	1	2	1	1	1	1

TABLE 10.4 - 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	9.0	9.4	9.4	9.6	7.1
Regions Visited						
Southeast	67	57	65	71	71	90
Southcentral	52	52	57	53	56	22
Interior	29	23	36	32	36	15
Southwest	4	6	5	2	4	2
Far North	2	2	2	1	1	1
Destinations Visited, Top 10						
Juneau	61	50	61	68	68	75
Ketchikan	58	48	59	65	64	75
Skagway	48	35	54	56	55	63
Anchorage	47	48	53	47	51	19
Glacier Bay Nat'l Park	29	26	24	28	25	39
Denali Nat'l Park	23	16	31	26	32	8
Seward	23	17	31	26	33	11
Fairbanks	17	13	19	18	19	7
Hoonah/Icy Strait Point	13	10	11	14	17	23
Talkeetna	11	9	16	13	16	2
Lodging Types Used						
Cruise	57	44	59	65	65	74
Hotel/motel	37	35	41	38	44	15
VFR	15	21	15	12	11	3
Lodge	15	12	19	17	18	6
Campground/RV	6	5	6	5	6	7
B&B	4	5	4	3	5	2
Vacation rental	3	4	5	3	2	1
Wilderness camping	2	2	3	1	2	2
State ferry	1	1	<1	<1	<1	1

TABLE 10.5 - Activities – Top 10
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Shopping	75	70	78	76	77	83
Wildlife viewing	45	42	48	46	51	31
Cultural activities	39	33	42	41	47	32
Day cruises	39	30	48	44	50	30
Hiking/nature walk	34	33	36	36	43	20
Train	32	22	35	42	40	32
City/sightseeing tours	31	26	36	36	37	29
Fishing	16	22	19	14	13	6
Flightseeing	13	11	14	14	17	10
Tramway/gondola	13	11	12	15	12	15

TABLE 10.6 - Satisfaction Ratings
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Satisfaction with overall Alaska experience						
Very satisfied	75	75	75	78	77	69
Satisfied	23	22	23	19	22	28
Compared to expectations						
Much higher	29	28	29	33	32	20
Higher	36	33	39	34	41	44
About as expected	32	36	29	30	25	33
Value for the money, compared to other destinations						
Much better	15	17	13	16	13	20
Better	23	24	26	25	24	20
About the same	45	45	44	45	47	44
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska as a vacation destination	79	80	83	81	81	76
Very likely to return to Alaska in the next five years	40	51	34	36	31	40

TABLE 10.7 - Previous Alaska Travel
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Been to Alaska before	40	54	34	36	26	42
Average # of vacation trips (base: repeaters)	4.1	4.7	3.5	3.0	3.2	5.6
Previously traveled in Alaska by cruise ship	16	20	14	18	11	21

TABLE 10.8 – Trip Planning
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Trip Decision, by Quarter						
Before July 2015	14	10	17	16	13	11
July-Sept 2015	17	15	17	20	20	15
Oct-Dec 2015	17	14	20	17	20	16
Jan-Mar 2016	23	25	25	23	24	19
Apr-Jun 2016	20	26	15	17	18	25
July-Sept 2016	8	10	6	7	6	14
Trip Booking, by Quarter						
Before July 2015	6	3	8	6	6	6
July-Sept 2015	11	8	11	13	14	10
Oct-Dec 2015	15	13	17	15	17	14
Jan-Mar 2016	27	26	30	27	26	22
Apr-Jun 2016	29	34	24	28	25	29
July-Sept 2016	13	16	10	11	12	19
Internet and Travel Agent Usage						
Used internet	68	72	66	74	65	52
Booked over internet	58	66	55	60	50	35
Used TravelAlaska.com	18	15	21	21	19	17
Received Official State Vacation Planner	12	9	17	15	13	8
Booked through travel agent	35	24	41	38	40	47
Other Sources – Top 10						
Friends/family	51	53	53	51	50	49
Prior experience	23	30	21	22	17	25
Cruise line	22	19	20	26	25	33
Brochures	15	13	17	14	15	14
AAA	8	9	10	8	12	5
Other travel/guide book	6	5	8	6	8	3
Tour company	5	4	3	6	8	3
Magazine	5	5	6	3	7	4
Television	4	3	5	4	5	3
Milepost	4	4	5	4	3	2

TABLE 10.9 - Top 10 Websites/Apps Used to Plan/Book
US Regions & Canada (%)

	All Visitors		Western US		Midwest US		Southern US		Eastern US		Canada	
	Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**
Airline websites	50	50	55	55	52	52	53	53	41	44	39	34
Cruise line websites	35	27	26	22	39	32	46	35	36	31	55	31
Google	28	4	25	4	28	4	28	2	25	4	32	4
Trip Advisor	23	3	17	3	26	3	27	3	20	4	34	4
Expedia	14	10	12	9	13	11	15	10	20	15	18	5
Hotel/lodge/RV Park	11	10	11	10	10	9	13	11	11	10	11	8
Tour company websites	11	8	9	6	13	9	11	8	14	11	9	6
Car/RV rental websites	10	9	10	9	12	10	10	9	9	9	3	2
Travelocity	7	2	9	3	7	4	8	1	4	2	9	1
Facebook	7	<1	7	<1	8	-	6	1	6	<1	5	<1

TABLE 10.10 - Demographics
US Regions & Canada (%)

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average party size	2.4	2.3	2.5	2.5	2.6	2.5
Average group size	4.2	3.5	4.8	4.1	5.2	4.2
Male/female	49/51	52/48	50/50	48/52	46/54	45/55
Average age	53.7	52.6	54.0	54.9	54.2	53.2
Children in household	23	24	22	20	24	30
Retired/semi-retired	44	41	47	49	40	45
College graduate	63	63	61	63	66	56
Average income	$114,000	$115,000	$114,000	$119,000	$123,000	$100,000

TABLE 10.11 – Average Spending in Alaska, Per Person, Per Trip
Excluding Transportation to/from Alaska
US Regions & Canada

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average per-trip spending	$1,057	$1,022	$1,219	$1,055	$1,152	$470

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Section 11: Summary Profiles - Southcentral Region and Communities

McDowell GROUP

Summary Profiles: Southcentral Region and 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 11.1 - Market Definition and Sample Size Southcentral Region and Communities

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Southcentral	Visited at least one destination in the Southcentral region, day and/or overnight	52%	975,000	3,547	±1.6%
Anchorage	Visited Anchorage or Eagle River, day and/or overnight	47%	896,000	3,216	±1.8%
Seward	Visited Seward, day and/or overnight	23%	441,000	1,599	±2.6%
Whittier	Visited Whittier, day and/or overnight	10%	234,000	722	±4.0%
Talkeetna	Visited Talkeetna, day and/or overnight	11%	239,000	862	±3.5%
Kenai/ Soldotna	Visited Kenai or Soldotna, day and/or overnight	7%	127,000	515	±4.6%
Homer	Visited Homer or Seldovia, day and/or overnight	9%	166,000	659	±3.9%
Palmer/ Wasilla	Visited Palmer or Wasilla, day and/or overnight	9%	174,000	703	±3.9%
Girdwood	Visited Girdwood or Alyeska, day and/or overnight	8%	153,000	582	±4.2%
Valdez	Visited Valdez, day and/or overnight	4%	71,000	384	±4.6%

Southcentral Alaska visitors differed in a number of ways from the overall market.

- More than half of Southcentral visitors traveled to Alaska by air, a third by cruise, and a small amount (5 percent) by highway/ferry.
- Within Southcentral, especially high percentages of visitors traveled to Kenai/Soldotna, Girdwood, Palmer/Wasilla, and Homer. Visitors to these communities were also much more likely to travel between communities by rental vehicle and stay in private homes while in Alaska.
- Nearly all Southcentral visitors included a stop in Anchorage. Slightly less than half visited Denali National Park and Seward. A third visited Juneau and Ketchikan. Fewer visited Fairbanks (26 percent).
- Valdez visitors were unique in the large percentage that travelled to the state by highway/ferry (23 percent). They also stayed longer in Alaska, averaging 15.0 nights, and nearly all also visited the Interior.
- Visitors to Anchorage were most likely to report participating in culture/history activities in the community, whereas wildlife viewing was the most reported activity for those visiting Seward, Valdez,

Palmer/Wasilla, and Homer. Day cruises were the top activity in Whittier, flightseeing in Talkeetna, and tramway in Girdwood.

- Roughly a third of visitors to Kenai/Soldotna reported fishing while in the community. Higher percentages of Homer visitors also fished (25 percent) compared to other Southcentral towns.
- Visitors to Kenai/Soldotna and Palmer/Wasilla were the most likely to say they were very likely to return to Alaska within five years, compared to visitors to other Southcentral communities. They were also the most likely to have visited Alaska previously.
- Despite reporting similar levels of satisfaction, only a third of visitors to Whittier, Talkeetna, and Seward said they were very likely to return. This can likely be attributed to the higher percentage of cruise travelers in those towns.
- One-third of Palmer/Wasilla visitors travelled to Alaska for the purpose of visiting friends/relatives, the highest percentage among Southcentral communities.
- Nearly half of all visitors to Kenai/Soldotna and Homer were from the Western U.S., compared to 39 percent of all Southcentral visitors.
- Southcentral visitors spent an average of $1,465 while in Alaska, much higher than the average among all visitors ($1,057). Homer visitors reported the highest average statewide spending at $1,912, while Whittier visitors spent the least at $1,447.
- Southcentral spent an average of $649 while in the region. The highest reported spending by community was in Anchorage, where visitors reported spending an average of $398 while in the community.

TABLE 11.2 - Trip Purpose and Packages
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Trip Purpose						
Vacation/pleasure	79	69	69	84	84	85
Visiting friends or relatives	13	19	19	12	12	10
Business	5	7	7	1	1	1
Business and pleasure	3	5	5	3	3	3
Purchased multi-day package (including cruise)						
Yes	64	46	45	55	53	51
Package type (Base: non-cruise, purchased package)						
Fishing lodge	49	35	34	18	22	7
Rail package	11	15	15	19	16	29
Wilderness lodge	10	12	12	15	15	15
Adventure tour	9	12	12	16	13	12
Motorcoach tour	8	11	11	16	8	19
Rental car/RV package	6	8	8	12	16	14
Hunting	2	3	3	-	-	1

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Purpose					
Vacation/pleasure	62	72	56	68	81
Visiting friends/rel.	26	23	32	23	15
Business only	5	1	5	2	1
Business/pleasure	7	4	7	7	2
Purchased multi-day package (including cruise)					
Yes	17	24	15	24	20
Package type (Base: non-cruise, purchased package)					
Fishing lodge	51	40	9	23	5
Rail package	5	10	6	13	8
Wilderness lodge	4	9	16	18	20
Adventure tour	12	13	23	20	19
Motorcoach tour	2	6	26	8	25
Rental car/RV package	21	17	12	15	19
Hunting	2	2	3	-	-

TABLE 11.3 - Transportation Modes
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Transportation Market						
Cruise	55	37	35	45	46	39
Air	40	58	60	50	50	55
Highway/ferry	5	5	5	5	4	6
Used to Travel Between Communities						
Tour bus/van	15	28	28	29	40	38
Rental vehicle	14	26	27	31	33	34
Alaska Railroad	14	26	26	31	35	42
Personal vehicle	9	16	16	13	13	14
Air	9	15	15	8	9	12
Rental RV	2	4	4	5	7	6
State ferry	2	2	2	2	4	4
Personal RV	1	2	2	3	2	3
		Kenai/ Soldotna	**Homer**	**Palmer/ Wasilla**	**Girdwood**	**Valdez**
Transportation Market						
Cruise		4	11	8	12	8
Air		87	77	80	83	69
Highway/ferry		8	12	12	6	23
Used to Travel Between Communities						
Tour bus/van		6	6	10	17	15
Rental vehicle		51	46	45	48	35
Alaska Railroad		8	9	12	21	14
Personal vehicle		27	23	32	25	20
Air		12	13	12	10	12
Rental RV		11	10	9	8	14
State ferry		3	6	3	3	13
Personal RV		7	8	7	4	12

TABLE 11.4 - Length of Stay, Destinations and Lodging Type
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Average length of stay in Alaska	9.2	10.8	10.7	11.1	10.9	12.2
Regions Visited						
Southeast	67	42	40	50	52	46
Southcentral	52	100	100	100	100	100
Interior	29	50	49	56	65	83
Southwest	4	8	8	3	3	3
Far North	2	3	3	2	2	3
Destinations Visited, Top 10						
Juneau	61	38	37	46	48	41
Ketchikan	58	37	35	45	47	39
Skagway	48	34	33	41	48	39
Anchorage	47	92	100	93	88	92
Glacier Bay Nat'l Park	29	13	12	11	29	14
Denali Nat'l Park	23	42	42	52	61	79
Seward	23	45	46	100	35	58
Fairbanks	17	26	25	27	31	38
Hoonah/Icy Strait Point	13	15	14	27	2	16
Talkeetna	11	22	22	28	34	100
Lodging Types Used						
Cruise ship	57	36	35	45	45	37
Hotel/Motel	37	63	65	69	64	73
Lodge	15	25	24	26	32	41
Bed & Breakfast	4	7	8	9	9	12
Vacation Rental	3	5	5	6	5	7
Friends/Family	15	21	22	15	13	15
Campground/RV	6	10	10	13	10	14
Wilderness Camping	2	3	3	3	2	4
State Ferry	1	1	1	1	1	1

TABLE 11.4 - Length of Stay, Destinations and Lodging Type (cont'd)
Southcentral Region and Communities (%)

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Average length of stay in Alaska	12.6	13.5	12.5	11.1	15.0
Regions Visited					
Southeast	12	20	17	19	27
Southcentral	100	100	100	100	100
Interior	41	47	58	56	90
Southwest	5	13	4	4	3
Far North	2	3	3	2	5
Destinations Visited, Top 10					
Juneau	7	14	11	14	14
Ketchikan	5	12	9	12	10
Skagway	6	6	10	12	15
Anchorage	92	94	95	98	89
Glacier Bay Nat'l Park	4	3	4	4	7
Denali Nat'l Park	33	38	45	50	65
Seward	53	56	47	61	51
Fairbanks	19	21	28	22	54
Hoonah/Icy Strait Point	<1	8	3	6	1
Talkeetna	24	23	36	36	34
Lodging Types Used					
Cruise ship	4	11	8	11	7
Hotel/Motel	55	52	55	65	58
Lodge	21	18	15	24	22
Bed & Breakfast	11	16	14	11	14
Vacation Rental	11	10	9	9	4
Friends/Family	31	29	37	28	25
Campground/RV	24	26	21	16	38
Wilderness Camping	5	6	5	3	10
State Ferry	1	2	1	1	2

TABLE 11.5 - Statewide Activities – Top 10
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Shopping	75	68	67	76	75	79
Wildlife viewing	45	65	66	74	73	77
Cultural activities	39	45	45	53	52	61
Day cruises	39	43	43	62	61	61
Hiking/nature walk	34	45	45	51	49	55
Train	32	34	33	44	47	49
City/sightseeing tours	31	28	28	36	37	35
Fishing	16	22	22	19	17	17
Flightseeing	13	16	16	20	19	30
Tramway/gondola	13	12	12	15	20	16
		Kenai/ Soldotna	**Homer**	**Palmer/ Wasilla**	**Girdwood**	**Valdez**
Shopping		71	70	72	75	67
Wildlife viewing		66	74	68	80	75
Cultural activities		36	49	50	49	59
Day cruises		36	44	38	53	55
Hiking/nature walk		49	53	56	66	54
Train		10	13	16	25	18
City/sightseeing tours		14	19	21	26	22
Fishing		56	45	24	17	32
Flightseeing		16	18	17	20	18
Tramway/gondola		8	10	11	37	11

TABLE 11.6 - Activities in Community/Region
Southcentral Region and Communities (%)

	South-central	Anchorage	Seward	Whittier	Talkeetna
Wildlife viewing	36	12	32	17	13
Birdwatching	9	3	8	5	12
Culture/history	23	16	8	2	8
Museums	18	13	6	2	4
Historical/cultural attractions	5	3	1	<1	2
Native cultural tours/act.	5	4	1	<1	1
Gold panning/mine tour	2	<1	<1	<1	1
Hiking/nature walk	27	12	20	4	13
Day cruises	21	1	30	22	7
City/sightseeing tours	12	11	3	2	4
Fishing	15	<1	8	2	3
Unguided	8	<1	3	1	1
Guided	9	<1	5	1	2
Flightseeing	6	1	1	<1	14
Dog sledding/kennel tour	4	<1	4	<1	5
Tramway/gondola	5	<1	<1	-	<1
Shows/Alaska entertainment	2	2	-	-	<1
Salmon bake/crab feed	1	<1	1	<1	<1
Camping	4	1	3	1	2
Kayaking/canoeing	3	<1	2	1	<1
Rafting	2	<1	<1	-	4
ATV/4-wheeling	2	<1	<1	-	1
Zipline	1	-	<1	-	2
Biking	3	2	1	<1	<1
Hot springs	<1	-	-	-	<1
Northern lights viewing	1	<1	<1	-	1
Hunting	<1	-	-	-	-
Other	3	<1	<1	<1	<1

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

TABLE 11.6 Activities in Community/Region (Cont'd)
Southcentral Region and Communities (%)

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Wildlife viewing	24	35	18	24	27
Birdwatching	4	14	3	2	12
Culture/history	3	13	13	6	21
Museums	3	12	8	2	20
Historical/cultural attractions	<1	1	4	<1	2
Native cultural tours/act.	<1	<1	1	-	1
Gold panning/mine tour	<1	<1	2	4	-
Hiking/nature walk	13	15	15	31	21
Day cruises	2	10	1	1	21
City/sightseeing tours	2	2	1	2	2
Fishing	32	26	5	-	15
Unguided	19	9	4	-	8
Guided	15	18	1	-	8
Flightseeing	4	4	1	1	1
Dog sledding/kennel tour	-	-	6	1	-
Tramway/gondola	-	-	-	35	-
Shows/Alaska entertainment	-	2	1	<1	-
Salmon bake/crab feed	1	<1	<1	<1	<1
Camping	5	8	5	1	11
Kayaking/canoeing	<1	2	1	-	8
Rafting	<1	<1	1	<1	-
ATV/4-wheeling	1	<1	3	-	1
Zipline	-	-	<1	-	-
Biking	<1	1	1	3	1
Hot springs	-	-	-	-	-
Northern lights viewing	1	<1	<1	-	1
Hunting	-	-	1	-	-
Other	1	1	2	1	1

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

TABLE 11.7 - Satisfaction Ratings
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Satisfaction with overall Alaska experience						
Very satisfied	75	74	74	78	79	79
Satisfied	23	24	24	21	20	19
Compared to expectations						
Much higher	29	28	27	30	31	32
Higher	36	36	37	38	40	41
About as expected	32	33	33	29	26	24
Value for the money, compared to other destinations						
Much better	15	11	10	11	12	12
Better	23	20	20	18	19	18
About the same	45	48	49	48	47	49
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	79	79	80	83	82	84
Very likely to return to Alaska in next five years	40	43	44	34	31	32

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Satisfaction with overall Alaska experience					
Very satisfied	70	74	75	76	71
Satisfied	27	24	23	23	24
Compared to expectations					
Much higher	24	27	27	29	25
Higher	38	36	38	44	39
About as expected	32	32	32	25	30
Value for the money, compared to other destinations					
Much better	10	9	9	9	8
Better	22	15	19	17	15
About the same	46	48	50	52	48
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	80	82	83	84	78
Very likely to return to Alaska in next five years	58	48	51	45	36

TABLE 11.8 - Previous Alaska Travel
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Been to Alaska before	40	43	43	31	29	31
Average # of vacation trips (base: repeaters)	4.1	4.6	4.5	3.2	2.4	3.1
Previously traveled in Alaska by cruise ship	16	14	13	14	12	13
		Kenai/ Soldotna	**Homer**	**Palmer/ Wasilla**	**Girdwood**	**Valdez**
Been to Alaska before		54	45	53	42	42
Average # of vacation trips (base: repeaters)		6.2	5.9	4.7	3.6	6.7
Previously traveled in Alaska by cruise ship		14	14	13	12	15

TABLE 11.9 - Trip Planning
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Trip Decision, by Quarter						
Before July 2015	14	13	12	16	14	16
July-Sept 2015	17	16	15	18	17	19
Oct-Dec 2015	17	16	16	16	17	19
Jan-Mar 2016	23	22	23	22	25	24
Apr-Jun 2016	20	23	24	20	20	17
July-Sept 2016	8	10	11	8	8	4
Trip Booking, by Quarter						
Before July 2015	6	4	4	5	5	5
July-Sept 2015	11	9	9	13	9	13
Oct-Dec 2015	15	13	13	16	16	18
Jan-Mar 2016	27	25	25	25	27	29
Apr-Jun 2016	29	32	33	28	30	26
July-Sept 2016	13	16	16	13	13	9
Internet including apps and Travel Agent Usage						
Used internet	68	73	74	75	72	78
Booked over internet	58	64	65	64	62	65
Used travelalaska.com	18	21	22	29	27	32
Received Official State Vacation Planner	12	15	15	19	21	24
Booked through travel agent	35	29	28	32	37	34
Other Sources – Top 10						
Friends/family	51	51	51	47	54	49
Prior experience	23	26	27	19	16	17
Cruise line	22	13	13	18	16	16
Brochures	15	18	18	22	24	26
AAA	8	8	8	10	11	13
Other travel/guide book	6	9	9	12	12	14
Tour company	5	5	5	7	6	8
Magazine	5	6	6	7	7	8
Television	4	4	4	5	3	4
Milepost	4	7	6	9	9	11

TABLE 11.9 - Trip Planning (Cont'd)
Southcentral Region and Communities (%)

	Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Trip Decision – Top Three Periods					
Before July 2015	8	10	11	10	14
July-Sept 2015	18	20	16	15	21
Oct-Dec 2015	13	14	16	19	13
Jan-Mar 2016	27	27	25	25	27
Apr-Jun 2016	25	21	24	23	15
July-Sept 2016	9	8	9	8	10
Trip Booking – Top Three Periods					
Before July 2015	<1	2	1	2	2
July-Sept 2015	5	5	5	6	5
Oct-Dec 2015	11	11	12	15	13
Jan-Mar 2016	31	31	27	26	27
Apr-Jun 2016	36	34	38	38	28
July-Sept 2016	17	17	17	13	26
Internet including apps and Travel Agent Usage					
Used internet	82	82	85	83	78
Booked over internet	76	73	78	76	62
Used TravelAlaska.com	26	28	29	33	31
Received Official State Vacation Planner	19	19	20	21	25
Booked through travel agent	9	14	11	16	21
Other Sources – Top 10					
Friends/family	56	55	62	52	45
Prior experience	35	29	34	24	28
Cruise line	3	3	4	6	5
Brochures	24	25	24	27	31
AAA	8	9	10	10	13
Other travel/guide book	9	13	13	13	18
Tour company	4	5	5	7	7
Magazine	8	9	8	9	12
Television	3	5	4	4	4
Milepost	13	16	17	12	28

TABLE 11.10 - Top 10 Websites/Apps Used to Plan/Book Southcentral Region and Communities (%)

	All Visitors		South-central		Anchorage		Seward		Whittier		Talkeetna	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	53	53	54	54	50	50	47	48	48	47
Cruise line websites	35	27	22	17	21	17	28	22	29	22	26	20
Google	28	4	29	5	30	5	36	6	37	6	37	7
Trip Advisor	23	3	23	4	23	4	32	5	32	5	31	5
Expedia	14	10	15	12	15	12	16	13	17	14	17	12
Hotel/lodge/RV Park	11	10	14	12	15	13	16	13	13	11	13	11
Tour company websites	11	8	14	10	14	10	20	14	18	13	21	15
Car/RV rental websites	10	9	16	14	16	14	18	16	19	18	20	17
Travelocity	7	2	6	3	6	3	7	3	6	3	6	3
Facebook	7	<1	5	<1	5	<1	6	<1	6	<1	7	<1

	Kenai/ Soldotna		Homer		Palmer/ Wasilla		Girdwood		Valdez	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	57	58	55	54	59	59	58	57	44	43
Cruise line websites	4	4	9	9	9	5	11	9	7	6
Google	33	9	35	9	33	5	33	6	38	6
Trip Advisor	24	6	26	6	28	4	30	4	34	9
Expedia	19	14	21	15	18	14	17	10	18	14
Hotel/lodge/RV Park	19	16	14	11	15	12	18	13	14	11
Tour company websites	15	11	19	14	16	11	20	13	16	14
Car/RV rental websites	29	25	26	25	25	21	27	23	23	21
Travelocity	8	3	8	4	7	4	10	4	8	5
Facebook	6	<1	7	<1	6	<1	5	<1	7	1

TABLE 11.11 - Demographics
Southcentral Region and Communities (%)

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Origin						
Western US	38	39	39	29	29	29
Southern US	21	22	21	23	24	24
Midwestern US	15	17	17	20	20	22
Eastern US	10	10	10	14	13	14
Canada	7	3	3	3	2	2
Other International	9	10	10	11	12	10
Other Demographics						
Average party size	2.4	2.3	2.3	2.5	2.5	2.5
Average group size	4.2	3.8	3.8	4.3	3.9	4.1
Male/female	49/51	52/48	52/48	49/51	50/50	50/50
Average age	53.7	53.7	53.4	53.7	54.4	54.8
Children in household	23	22	22	22	20	19
Retired/semi-retired	44	42	41	45	44	46
College graduate	63	64	65	66	63	67
Average income	$114,000	$113,000	$113,000	$114,000	$113,000	$117,000

		Kenai/ Soldotna	Homer	Palmer/ Wasilla	Girdwood	Valdez
Origin						
Western US		48	46	41	39	31
Southern US		16	16	21	22	19
Midwestern US		20	19	18	19	15
Eastern US		8	8	10	11	9
Canada		1	3	2	1	4
Other International		6	8	9	9	22
Other Demographics						
Average party size		2.6	2.5	2.4	2.5	2.4
Average group size		3.8	3.3	3.6	3.9	3.4
Male/female		59/41	54/46	50/50	48/52	54/46
Average age		50.6	53.2	51.3	49.7	53.3
Children in household		28	23	25	24	17
Retired/semi-retired		37	42	41	35	46
College graduate		62	63	58	65	63
Average income		$112,000	$108,000	$106,000	$111,000	$101,000

TABLE 11.12 – Visitor Expenditures, Per Person
Southcentral Region and Communities

	All Visitors	South-central	Anchorage	Seward	Whittier	Talkeetna
Average per-person total spent in Alaska	$1,057	$1,465	$1,514	$1,539	$1,447	$1,815
Average per-person total spent in region/ community		649	398	164	67	169
Lodging		169	124	41	5	36
Tours/activity/ entertainment		99	19	67	51	62
Gifts/souvenirs/ clothing		60	42	13	1	15
Food/beverage		147	94	32	8	34
Rental cars/fuel/ transportation		124	116	9	2	5
Other		50	2	2	1	15
		Kenai/ Soldotna	**Homer**	**Palmer/ Wasilla**	**Girdwood**	**Valdez**
Average per-person total spent in Alaska		$1,769	$1,912	$1,629	$1,793	$1,848
Average per-person total spent in region/ community		367	294	251	130	282
Lodging		85	77	35	52	78
Tours/activity/ entertainment		43	81	18	17	87
Gifts/souvenirs/ clothing		28	26	14	7	15
Food/beverage		92	61	53	45	66
Rental cars/fuel/ transportation		38	20	43	8	20
Other		81	28	88	1	17

AVSP 7 – Summer 2016

Section 12: Summary Profiles - Southeast Region and Communities

McDowell GROUP

Summary Profiles: Southeast Region and Communities

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

TABLE 12.1 Market Definition and Sample Size
Southeast Region and Communities

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Southeast	Visited at least one destination in the Southeast region, day and/or overnight	67%	1,212,000	3,458	±1.6%
Juneau	Visited Juneau or Douglas, day and/or overnight	61%	1,093,000	2,525	±2.0%
Ketchikan	Visited Ketchikan or Saxman, day and/or overnight	58%	998,000	2,277	±2.1%
Skagway	Visited Skagway, day and/or overnight	48%	851,000	1,908	±2.2%
Sitka	Visited Sitka, day and/or overnight	9%	158,000	496	±4.1%
Prince of Wales Island	Visited Prince of Wales Island, day and/or overnight	1%	16,000	141	±8.1%
Glacier Bay	Visited Glacier Bay, day and/or overnight	29%	506,000	895	±3.4%
Haines	Visited Haines, day and/or overnight	4%	96,000	332	±5.2%
Hoonah/Icy Strait Point	Visited Hoonah or Icy Strait Point, day and/or overnight	13%	163,000	463	±4.5%
Petersburg	Visited Petersburg, day and/or overnight	1%	14,000	105	±9.6%
Wrangell	Visited Wrangell, day and/or overnight	1%	18,000	116	±9.2%
Gustavus	Visited Gustavus, day and/or overnight	1%	16,000	111	±7.5%

There are notable differences in characteristics among the most-frequented communities in Southeast.

- Nearly all Southeast visitors were traveling for vacation/pleasure (94 percent), compared to 79 percent of all Alaska visitors. This corresponds to a much higher rate of cruise travelers in Southeast Alaska (86 percent of Southeast visitors travelled by cruise ship compared to 55 percent of Alaska visitors).
- Of Southeast non-cruise visitors who purchased a multi-day package, nearly eight in ten were fishing lodge packages.
- The average length of stay among Southeast visitors was 8.6 nights.
- While Southeast visitors are very likely to recommend Alaska (80 percent), they are less likely to intend to return to the state in the next five years and less likely to have traveled to Alaska previously (31 percent for both measures).

- Nearly half booked their travel arrangements through a travel agent, reflecting the high proportion of cruise visitors.
- Over 90 percent of visitors to Juneau, Ketchikan, Skagway, Glacier Bay, and Hoonah were cruise visitors. Sitka (82 percent) and Haines (69 percent) had slightly lower rates of cruise visitors, while Prince of Wales, Petersburg, Wrangell, and Gustavus had a much lower cruise visitor rates. Most of the differences in trip behavior and visitor characteristics among these markets relate to their proportion of cruise visitors.
- Visitors to Gustavus and Prince of Wales were much more likely to travel to and from Alaska by air (76 to 77 percent). Overall, only 11 percent of Southeast visitors traveled to and from Alaska by air.
- Visitors to Gustavus, Petersburg, and Wrangell were more likely to travel by ferry between communities on their Alaska trip (23 to 26 percent, compared to 11 percent of POW visitors, 16 percent of Haines visitors, and 1 to 3 percent of visitors to other Southeast communities).
- Wrangell visitors averaged the longest length of stay in Alaska, at 17.2 nights, followed by Petersburg, Gustavus, and Haines visitors at 13.0, 12.2, and 11.2 nights, respectively.
- Seven out of ten Prince of Wales Island visitors participated in fishing while in the community – the highest among Southeast communities. Other communities with relatively high proportion of visitors reporting fishing in the community include Gustavus (30 percent) and Petersburg (24 percent).
- Day cruises were popular activities in Juneau (31 percent of visitors to the community reported this activity), Gustavus (20 percent), and Hoonah (18 percent). Culture/history activities were especially popular in Sitka (39 percent) and Wrangell (28 percent).
- Visitors to Prince of Wales were less likely to report using travelalaska.com than visitors to other Southeast communities (7 percent, compared to 13-27 percent).
- POW visitors were far more likely to intend to return to Alaska in the next five years (79 percent), compared to 31 percent of all Southeast visitors. POW visitors were also more likely to rate their Alaska trip as a much better value for the money compared to other destinations (43 percent rated Alaska much better, compared to 17 percent of Southeast visitors).
- Roughly half or more visitors to POW, Petersburg, Sitka, Haines, and Gustavus were from the Western United States, compared to 28 to 36 percent of visitors to other Southeast communities.
- Prince of Wales, Gustavus, and Petersburg visitors reported higher average annual incomes ($135,000, $128,000, and $125,000, respectively), compared to visitors to other communities and to the overall average for Southeast visitors ($116,000).
- Southeast visitors spent an average of $760 per person in Alaska, much lower than the statewide average of $1,057. Among Southeast communities, Gustavus visitors reported the highest statewide spending at $2,858, while Glacier Bay visitors spent the lowest at $598.
- Southeast visitors spent an average of $487 while in Southeast. In terms of spending in communities, spending was highest in Gustavus ($946 per person) and lowest in Glacier Bay ($13 per person).

TABLE 12.2 - Trip Purpose and Packages
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Trip Purpose							
Vacation/pleasure	79	94	96	97	99	94	69
Visiting friends/rel.	13	4	2	2	1	3	19
Business only	5	1	1	1	<1	2	5
Business/pleasure	3	1	1	<1	<1	2	7
Purchased multi-day package (including cruise)							
Yes	64	89	94	96	96	90	46
Package type (Base: non-cruise, purchased package)							
Fishing lodge	49	79	64	87	4	91	96
Rail package	11	1	1	-	-	-	-
Wilderness lodge	10	6	12	4	24	2	-
Adventure tour	9	6	10	<1	6	2	1
Motorcoach tour	8	1	2	-	22	-	-
Rental car/RV package	6	2	<1	-	21	-	-
Hunting	2	<1	-	1	-	-	3

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Trip Purpose						
Vacation/pleasure	99	94	99	69	79	84
Visiting friends/rel.	1	4	1	13	15	14
Business only	<1	1	<1	11	-	-
Business/pleasure	<1	1	<1	8	6	2
Purchased multi-day package (including cruise)						
Yes	98	71	99	31	36	44
Package type (Base: non-cruise, purchased package)						
Fishing lodge	30	14	67	51	3	48
Rail package	1	-	-	-	-	3
Wilderness lodge	23	19	17	13	24	21
Adventure tour	19	13	-	-	58	13
Motorcoach tour	1	8	-	-	3	-
Rental car/RV package	11	13	-	-	3	-
Hunting	-	-	-	-	-	-

TABLE 12.3 - Transportation Modes
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Transportation Market							
Cruise	55	86	93	96	96	82	13
Air	40	11	6	4	1	17	76
Highway/ferry	5	3	1	1	3	1	11
Used to Travel Between Communities							
Tour bus/van	15	18	20	20	24	8	1
Rental vehicle	14	3	3	3	3	4	4
Alaska Railroad	14	16	17	17	20	9	2
Personal vehicle	9	1	1	1	1	1	6
Air	9	6	4	3	2	6	61
Rental RV	2	<1	<1	<1	<1	<1	<1
State ferry	2	2	2	1	2	3	11
Personal RV	1	<1	<1	<1	<1	<1	1

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Transportation Market						
Cruise	97	69	98	23	22	11
Air	2	9	1	55	61	77
Highway/ferry	<1	22	<1	22	16	11
Used to Travel Between Communities						
Tour bus/van	16	16	23	14	17	10
Rental vehicle	3	5	2	9	22	18
Alaska Railroad	14	10	18	8	9	11
Personal vehicle	<1	7	<1	14	18	6
Air	2	6	2	40	33	58
Rental RV	<1	3	<1	4	12	2
State ferry	1	16	1	23	26	26
Personal RV	<1	4	-	2	1	1

**TABLE 12.4 - Length of Stay, Destinations, and Lodging Type
Southeast Region and Communities (%)**

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Average length of stay in Alaska	9.2	8.6	8.6	8.5	8.5	8.5	9.6
Regions Visited							
Southeast	67	100	100	100	100	100	100
Southcentral	52	32	33	33	37	27	10
Interior	29	20	20	20	24	7	4
Southwest	4	1	1	1	<1	8	-
Far North	2	1	<1	<1	1	<1	-
Destinations Visited, Top 10							
Juneau	61	91	100	96	97	86	17
Ketchikan	58	87	92	100	94	82	93
Skagway	48	72	77	78	100	14	6
Anchorage	47	28	28	28	32	26	10
Glacier Bay Nat'l Park	29	43	46	48	48	38	8
Denali Nat'l Park	23	19	19	19	23	7	2
Seward	23	17	18	18	20	16	2
Fairbanks	17	12	11	11	14	3	4
Hoonah/Icy Strait Point	13	20	21	22	18	14	3
Talkeetna	11	8	8	8	9	4	2
Lodging Types Used							
Cruise ship	57	85	93	95	95	81	13
Hotel/motel	37	27	27	25	28	20	37
Lodge	15	14	13	13	14	11	37
VFR	15	4	2	2	1	5	32
Campground/RV	6	2	1	1	2	1	3
B&B	4	2	2	1	1	3	5
Vacation rental	3	1	1	1	<1	1	6
Wilderness camping	2	1	<1	<1	<1	1	3
State ferry	1	1	1	1	<1	1	10

TABLE 12.4 - Length of Stay, Destinations and Lodging Type (cont'd)
Southeast Region and Communities (%)

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Average length of stay in Alaska	8.4	11.2	9.4	13.0	17.2	12.2
Regions Visited						
Southeast	100	100	100	100	100	100
Southcentral	24	37	58	39	62	38
Interior	18	30	24	28	55	30
Southwest	<1	1	5	3	5	3
Far North	<1	3	<1	5	8	3
Destinations Visited, Top 10						
Juneau	98	80	99	83	49	88
Ketchikan	97	73	98	36	42	16
Skagway	81	73	66	25	21	14
Anchorage	20	32	51	36	58	37
Glacier Bay Nat'l Park	100	60	28	21	15	57
Denali Nat'l Park	18	25	24	26	48	26
Seward	9	25	48	6	38	16
Fairbanks	11	18	12	17	29	21
Hoonah/Icy Strait Point	13	41	100	11	6	15
Talkeetna	6	10	14	21	34	10
Lodging Types Used						
Cruise ship	97	68	98	23	22	11
Hotel/motel	18	30	40	62	63	66
Lodge	12	12	15	22	17	48
VFR	1	5	1	21	25	23
Campground/RV	1	14	1	13	29	10
B&B	1	4	1	12	19	23
Vacation rental	<1	2	1	3	1	6
Wilderness camping	<1	3	<1	7	18	10
State ferry	<1	5	<1	13	13	6

TABLE 12.5 - Statewide Activities – Top 10
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Shopping	75	82	84	84	85	77	50
Wildlife viewing	45	38	37	36	38	45	33
Cultural activities	39	42	43	43	43	50	11
Day cruises	39	44	47	46	49	30	3
Hiking/nature walk	34	28	28	26	27	31	18
Train	32	43	46	47	57	14	1
City/sightseeing tours	31	40	42	43	45	37	2
Fishing	16	10	6	6	5	13	72
Flightseeing	13	14	15	14	15	12	<1
Tramway/gondola	13	16	17	16	16	16	-
		Glacier Bay	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**	**Gustavus**
Shopping		86	86	85	59	59	69
Wildlife viewing		33	41	45	57	75	69
Cultural activities		38	43	52	51	58	54
Day cruises		44	43	48	33	54	50
Hiking/nature walk		24	33	34	52	64	68
Train		49	27	40	22	23	15
City/sightseeing tours		43	43	51	25	18	22
Fishing		4	17	6	39	23	43
Flightseeing		13	10	17	12	18	16
Tramway/gondola		18	20	20	9	9	16

TABLE 12.6 Activities in Community/Region
Southeast Region and Communities (%)

	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Day cruises	38	31	9	4	10	-
Culture/History	33	13	18	12	39	3
Museums	15	8	6	5	12	-
Historical/cultural attractions	12	3	7	2	29	2
Native cultural tours/act.	12	2	9	1	9	2
Gold panning/mine tour	6	2	<1	5	-	-
City/sightseeing tours	34	19	22	16	17	1
Wildlife viewing	27	14	12	11	22	31
Birdwatching	5	3	2	2	4	4
Hiking/nature walk	23	15	7	8	17	13
Tramway/gondola	15	15	<1	<1	-	-
Flightseeing	12	6	6	2	<1	-
Shows/Alaska entertainment	11	1	11	1	1	<1
Dog sledding	8	4	<1	6	-	-
Salmon bake/crab feed	11	7	3	3	1	3
Fishing	9	2	3	<1	12	69
Unguided	3	1	1	<1	3	44
Guided	6	2	2	<1	10	29
Zipline	5	1	2	1	-	-
Kayaking/canoeing	4	2	1	1	1	3
ATV/4-wheeling	3	<1	1	2	1	<1
Rafting	2	1	<1	1	-	-
Biking	2	1	<1	1	2	-
Camping	1	<1	<1	1	<1	4
Northern lights viewing	<1	<1	<1	<1	-	-
Hot springs	<1	<1	-	-	<1	-
Hunting	<1	<1	<1	-	-	2
Other	2	<1	1	1	1	-

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

**TABLE 12.6 Activities in Community/Region (Cont'd)
Southeast Region and Communities (%)**

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Day cruises	1	5	18	9	7	20
Culture/History	<1	12	12	17	28	6
Museums	<1	10	4	11	21	4
Historical/cultural attractions	<1	2	4	6	9	2
Native cultural tours/act.	<1	2	6	3	5	1
Gold panning/mine tour	-	<1	<1	1	-	1
City/sightseeing tours	<1	7	4	9	1	5
Wildlife viewing	6	17	13	28	27	45
Birdwatching	1	6	2	6	8	17
Hiking/nature walk	1	10	7	20	25	38
Tramway/gondola	-	-	1	-	-	-
Flightseeing	<1	2	-	3	4	3
Shows/Alaska entertainment	-	<1	<1	4	-	-
Dog sledding	-	-	-	-	<1	-
Salmon bake/crab feed	<1	<1	1	2	-	-
Fishing	<1	3	2	24	11	30
Unguided	<1	3	1	23	10	12
Guided	<1	1	2	2	5	19
Zipline	-	-	7	-	-	-
Kayaking/canoeing	<1	2	1	8	12	12
ATV/4-wheeling	-	1	3	-	-	-
Rafting	<1	5	<1	-	2	-
Biking	-	3	-	2	3	9
Camping	-	8	<1	6	5	5
Northern lights viewing	<1	-	-	1	3	1
Hot springs	-	-	-	-	-	-
Hunting	-	<1	-	-	-	-
Other	-	<1	<1	3	2	-

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

TABLE 12.7 - Satisfaction Ratings
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Satisfaction with overall Alaska experience							
Very satisfied	75	76	76	77	77	78	84
Satisfied	23	22	22	21	21	20	14
Compared to expectations							
Much higher	29	31	30	30	32	28	36
Higher	36	36	36	36	36	36	31
About as expected	32	31	31	31	30	31	31
Value for the money, compared to other destinations							
Much better	15	17	17	18	17	21	43
Better	23	25	25	26	25	29	29
About the same	45	44	45	44	45	40	26
Likelihood to recommend and return to Alaska							
Very likely to recommend Alaska	79	80	80	80	80	82	87
Very likely to return to Alaska in next five years	40	31	27	27	25	37	79

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Satisfaction with overall Alaska experience						
Very satisfied	74	69	76	76	86	87
Satisfied	23	28	22	21	13	11
Compared to expectations						
Much higher	25	16	27	33	38	36
Higher	37	36	38	38	35	41
About as expected	35	43	33	27	24	21
Value for the money, compared to other destinations						
Much better	18	11	16	24	13	17
Better	26	27	25	27	28	22
About the same	45	47	43	38	40	38
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	77	78	80	83	86	89
Very likely to return to Alaska in next five years	26	33	27	56	41	46

TABLE 12.8 - Previous Alaska Travel
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Been to Alaska before	40	31	29	29	27	36	77
Average # of vacation trips (base: repeaters)	4.1	3.3	2.7	2.7	2.6	3.2	8.3
Previously traveled in Alaska by cruise ship	16	19	19	20	19	25	25
		Glacier Bay	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**	**Gustavus**
Been to Alaska before		28	34	22	53	42	44
Average # of vacation trips (base: repeaters)		2.6	5.0	3.2	4.5	4.1	6.0
Previously traveled in Alaska by cruise ship		21	20	18	14	12	11

TABLE 12.9 - Trip Planning
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Trip Decision, by Quarter							
Before July 2015	14	17	18	18	20	15	10
July-Sept 2015	17	19	19	19	19	15	32
Oct-Dec 2015	17	20	20	20	20	23	12
Jan-Mar 2016	23	23	23	23	23	23	18
Apr-Jun 2016	20	16	15	14	14	16	21
July-Sept 2016	8	6	5	5	5	9	9
Trip Booking, by Quarter							
Before July 2015	6	8	8	9	9	7	4
July-Sept 2015	11	14	15	15	15	13	15
Oct-Dec 2015	15	18	19	19	19	20	17
Jan-Mar 2016	27	28	29	29	28	28	24
Apr-Jun 2016	29	22	21	21	20	20	25
July-Sept 2016	13	10	8	8	8	11	15
Internet and Travel Agent Usage							
Used internet	68	62	62	62	60	62	86
Booked over internet	58	50	49	49	48	51	76
Used TravelAlaska.com	18	17	18	17	18	13	7
Received Official State Vacation Planner	12	11	11	11	12	7	8
Booked through travel agent	35	48	51	52	53	40	11
Other Sources – Top 10							
Friends/family	51	49	49	50	49	43	76
Prior experience	23	18	16	17	16	20	47
Cruise line	22	33	36	36	36	33	3
Brochures	15	14	14	13	14	11	8
AAA	8	9	10	10	9	12	1
Other travel/guide book	6	6	6	5	6	5	2
Tour company	5	6	6	6	7	5	2
Magazine	5	4	4	4	4	3	1
Television	4	5	5	5	5	5	2
Milepost	4	2	1	1	2	1	3

TABLE 12.9 - Trip Planning
Southeast Region and Communities (%)

	Glacier Bay	Haines	Hoonah	Petersburg	Wrangell	Gustavus
Trip Decision, by Quarter						
Before July 2015	18	11	20	23	25	17
July-Sept 2015	16	14	21	20	11	26
Oct-Dec 2015	21	16	17	15	19	12
Jan-Mar 2016	24	20	17	20	24	23
Apr-Jun 2016	15	28	20	15	18	15
July-Sept 2016	6	10	5	8	3	8
Trip Booking, by Quarter						
Before July 2015	9	5	10	5	4	6
July-Sept 2015	13	6	19	11	10	10
Oct-Dec 2015	18	16	17	23	21	13
Jan-Mar 2016	31	18	22	20	28	30
Apr-Jun 2016	22	39	26	27	26	28
July-Sept 2016	8	17	5	14	10	13
Internet and Travel Agent Usage						
Used internet	61	67	65	85	87	79
Booked over internet	47	56	51	76	69	68
Used TravelAlaska.com	18	19	21	18	24	27
Received Official State Vacation Planner	12	11	14	15	18	21
Booked through travel agent	52	34	53	15	27	18
Other Sources – Top 10						
Friends/family	51	43	50	47	45	59
Prior experience	16	24	16	22	21	25
Cruise line	40	31	36	7	10	8
Brochures	14	24	15	18	24	23
AAA	11	15	8	10	14	7
Other travel/guide book	7	10	4	10	19	20
Tour company	5	3	5	8	6	5
Magazine	5	8	4	12	20	3
Television	5	3	6	2	4	2
Milepost	1	10	2	14	23	17

TABLE 12.10 - Top 10 Websites/Apps Used to Plan/Book
Southeast Region and Communities (%)

	All Visitors		Southeast		Juneau		Ketchikan		Skagway		Sitka		POW	
	Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**
Airline websites	50	50	44	44	42	41	42	41	40	38	49	46	75	78
Cruise line websites	35	27	56	44	62	49	63	51	66	54	52	37	9	6
Google	28	4	27	2	28	2	27	2	29	2	26	3	9	1
Trip Advisor	23	3	26	3	28	3	27	3	27	3	30	1	3	<1
Expedia	14	10	13	8	14	8	14	8	15	8	12	6	1	1
Hotel/lodge/RV Park	11	10	9	7	9	7	9	7	8	6	15	9	12	10
Tour company websites	11	8	10	6	10	6	10	6	11	6	13	8	3	2
Car/RV rental websites	10	9	4	3	4	3	3	2	4	3	4	3	1	<1
Travelocity	7	2	8	2	9	2	9	2	8	2	12	2	3	3
Facebook	7	<1	8	<1	8	<1	8	<1	8	<1	12	<1	4	-
			Glacier Bay		**Haines**		**Hoonah**		**Petersburg**		**Wrangell**		**Gustavus**	
			Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**		**Book**	**Plan**
Airline websites			39	35	24	26	38	40	56	57	56	51	66	62
Cruise line websites			69	53	46	38	63	51	15	9	17	8	10	7
Google			26	1	26	3	32	1	23	6	34	5	36	5
Trip Advisor			27	4	16	2	30	3	29	5	38	10	28	9
Expedia			13	5	19	13	14	10	13	7	8	5	19	10
Hotel/lodge/RV Park			8	5	8	5	11	10	23	16	20	14	24	16
Tour company websites			11	6	10	9	12	6	15	10	15	14	20	17
Car/RV rental websites			4	3	5	4	3	2	6	6	24	23	14	12
Travelocity			9	2	3	-	7	1	5	1	11	<1	3	1
Facebook			11	1	10	<1	9	-	6	-	10	-	7	-

TABLE 12.11 - Demographics
Southeast Region and Communities (%)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Origin							
Western US	38	33	32	32	28	50	68
Southern US	21	23	24	23	24	21	9
Midwestern US	15	15	15	15	17	9	14
Eastern US	10	10	11	11	11	9	6
Canada	7	10	9	9	9	5	<1
Other International	9	10	10	10	11	6	3
Other Demographics							
Average party size	2.4	2.5	2.5	2.5	2.6	2.3	2.0
Average group size	4.2	4.8	4.9	5.0	5.3	4.0	5.9
Male/female	49/51	46/54	45/55	45/55	45/55	44/56	62/38
Average age	53.7	55.9	56.2	56.5	56.0	59.8	57.0
Children in household	23	22	22	22	21	16	19
Retired/semi-retired	44	50	50	51	50	60	50
College graduate	63	64	64	64	63	68	66
Average income	$114,000	$116,000	$117,000	$116,000	$116,000	$119,000	$135,000
		Glacier Bay	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**	**Gustavus**
Origin							
Western US		36	47	29	62	33	50
Southern US		20	14	23	8	11	18
Midwestern US		12	12	12	13	17	14
Eastern US		8	5	12	4	13	4
Canada		10	14	13	-	<1	2
Other International		14	8	10	13	26	12
Other Demographics							
Average party size		2.4	2.3	2.5	2.4	2.6	2.3
Average group size		5.2	4.1	4.4	3.6	3.1	3.1
Male/female		43/57	45/55	45/55	54/46	51/49	59/41
Average age		58.4	54.3	57.1	56.4	53.0	55.8
Children in household		16	23	25	15	11	14
Retired/semi-retired		55	49	51	59	47	43
College graduate		60	61	67	55	67	76
Average income		$111,000	$120,000	$118,000	$125,000	$119,000	$128,000

TABLE 12.12 – Visitor Expenditures, Per Person
Southeast Region and Communities ($)

	All Visitors	Southeast	Juneau	Ketchikan	Skagway	Sitka	POW
Average per-person total spent in Alaska	$1,057	$760	$695	$654	$665	$917	$1,724
Average per-person total spent in region/ community		487	188	159	149	353	972
Lodging		23	11	6	2	14	102
Tours/activity/ entertainment		203	95	58	98	41	26
Gifts/souvenirs/ clothing		142	53	69	38	43	18
Food/beverage		48	19	15	10	34	115
Rental cars/fuel/ transportation		11	5	3	1	5	47
Other		61	6	8	0	216	664
		Glacier Bay	**Haines**	**Hoonah**	**Petersburg**	**Wrangell**	**Gustavus**
Average per-person total spent in Alaska		$598	$966	$806	$2,104	$2,177	$2,858
Average per-person total spent in region/ community		13	111	92	280	236	946
Lodging		2	19	1	75	30	104
Tours/activity/ entertainment		5	35	57	38	44	155
Gifts/souvenirs/ clothing		1	15	26	34	26	13
Food/beverage		1	30	7	69	71	101
Rental cars/fuel/ transportation		-	7	1	14	10	110
Other		4	4	-	50	56	463

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Section 13: Summary Profiles - Interior Region and Communities

McDowell GROUP

Summary Profile: Interior Region and Communities

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

TABLE 13.1 - Market Definition and Sample Size
Interior Region and Communities

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Interior	Visited at least one destination in the Interior region, day and/or overnight	29%	543,000	2,400	±2.0%
Denali	Visited Denali National Park, day and/or overnight	23%	428,000	1,813	±2.4%
Fairbanks	Visited Fairbanks, day and/or overnight	17%	320,000	1,587	±2.5%
Tok	Visited Tok, day and/or overnight	3%	51,000	315	±4.9%
Glennallen	Visited Glennallen, day and/or overnight	3%	47,000	271	±6.8%
Delta Junction	Visited Delta Junction, day and/or overnight	2%	38,000	223	±6.9%
Healy	Visited Healy, day and/or overnight	2%	43,000	213	±9.1%
Copper Center	Visited Copper Center, day and/or overnight	1%	26,000	130	±5.2%
Chicken	Visited Chicken, day and/or overnight	1%	18,000	130	±8.9%

Visitors to Interior Alaska differed in several ways.

- Interior visitors were more likely to travel to Alaska by air (49 percent) than travel by cruise ship. Eleven percent travelled to Alaska by highway or ferry, roughly double the overall average for Alaska visitors.
- Cruise visitors made up half of visitors to Denali and sizable portions of Fairbanks and Copper Center visitors (41 and 28 percent, respectively).
- The average length of stay in Alaska for Interior visitors was 11.7 nights. Nearly all also visited the Southcentral region (88 percent) during their stay. Three-quarters stayed at a hotel/motel.
- Interior Alaska visitors that purchased a multi-day, non-cruise package were most likely to have purchased a rail package (27 percent). Only 4 percent purchased a fishing lodge package.
- Four in ten Interior visitors reported traveling between communities by train and/or by tour bus.
- Visitors to remote, eastern Interior communities were much more likely to travel to Alaska by highway/ferry, including roughly three quarters of visitors to Tok and Chicken and a third of visitors to Glennallen and Delta Junction. These visitors were also less likely to plan their trips well ahead of time and more likely travel between communities by personal RV and stay in campgrounds.
- Visitors to Delta Junction were especially likely to travel for the purpose of visiting friends/family, and over half of visitors to the community said they were very likely to return to Alaska in the next five years.

- Popular activities reported by visitors to Interior Alaska include wildlife viewing (61 percent), culture/history activities (33 percent), hiking/nature walk (29 percent), and city/sightseeing tours (35 percent).

- The most popular activities in Fairbanks were museums (26 percent), gold panning/mine tour, historical/cultural attractions (21 percent), and day cruises (20 percent).

- Interior visitors spent an average of $1,474 while in Alaska, much higher than the average among all visitors ($1,057). Healy visitors reported the highest average statewide spending at $2,044, while Chicken visitors spent the least at $1,330.

- Interior visitors spent an average of $441 while in the region. The highest reported spending by community was in Fairbanks, where visitors reported spending an average of $391 while in the community.

TABLE 13.2 - Trip Purpose and Packages
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Trip Purpose					
Vacation/pleasure	79	79	90	74	78
Visiting friends/rel.	13	14	8	15	16
Business only	5	4	1	7	2
Business/pleasure	3	3	1	4	3
Purchased multi-day package (including cruise)					
Yes	64	49	60	49	7
Package type (Base: non-cruise, purchased package)					
Fishing lodge package	49	4	2	3	*
Rail package	11	27	30	26	*
Wilderness lodge	10	18	19	14	*
Adventure tour	9	16	15	16	*
Motorcoach tour	8	18	18	24	*
Rental car/RV package	6	12	12	11	*
Hunting	2	1	-	1	*
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Trip Purpose					
Vacation/pleasure	78	63	81	85	87
Visiting friends/rel.	16	26	14	11	13
Business only	2	6	2	2	-
Business/pleasure	4	5	3	2	-
Purchased multi-day package (including cruise)					
Yes	13	12	18	37	6
Package type (Base: non-cruise, purchased package)					
Fishing lodge package	*	*	*	*	*
Wilderness lodge	*	*	*	*	*
Rail package	*	*	*	*	*
Adventure tour	*	*	*	*	*
Motorcoach tour	*	*	*	*	*
Rental car/RV package	*	*	*	*	*
Hunting	*	*	*	*	*

*Sample size too small for analysis.

TABLE 13.3 - Transportation Modes
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Transportation Market					
Cruise	55	41	51	41	3
Air	40	49	43	49	19
Highway/ferry	5	11	6	11	78
Used to Travel Between Communities					
Tour bus or van	15	38	47	39	5
Rental vehicle	14	27	27	24	14
Alaska Railroad	14	40	49	41	4
Air	9	14	9	13	42
Personal vehicle	9	11	10	14	5
Rental RV	2	5	6	4	7
State ferry	2	4	3	3	11
Personal RV	1	4	3	4	24
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Transportation Market					
Cruise	5	3	11	28	2
Air	58	62	73	59	28
Highway/ferry	37	36	16	13	70
Used to Travel Between Communities					
Tour bus or van	8	7	16	29	4
Rental vehicle	29	36	55	33	19
Alaska Railroad	10	8	18	26	5
Air	32	37	21	16	33
Personal vehicle	9	8	11	7	4
Rental RV	16	10	8	17	10
State ferry	8	10	8	9	14
Personal RV	16	11	6	5	21

TABLE 13.4 - Length of Stay, Destinations and Lodging Type Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Average length of stay in Alaska	9.2	11.7	11.7	12.3	15.0
Regions Visited					
Southeast	67	47	57	47	32
Southcentral	52	88	95	82	82
Interior	29	100	100	100	100
Southwest	4	2	2	2	2
Far North	2	3	3	6	8
Destinations Visited, Top 10					
Juneau	61	42	51	41	7
Ketchikan	58	39	49	39	8
Skagway	48	40	49	41	21
Anchorage	47	80	87	70	72
Glacier Bay Nat'l Park	29	18	22	18	4
Seward	23	45	52	37	38
Denali Nat'l Park	23	79	100	74	52
Fairbanks	17	57	54	100	63
Hoonah/Icy Strait Point	13	11	14	9	1
Talkeetna	11	32	39	26	24
Lodging Types Used					
Cruise ship	57	40	49	40	3
Hotel/motel	37	74	79	72	42
Lodge	15	36	44	36	10
B&B	4	8	8	6	6
Vacation rental	3	4	4	2	3
Friends/family	15	16	10	18	21
Campground/RV	6	14	14	13	53
Wilderness camping	2	4	3	5	13
State ferry	1	1	1	1	6

TABLE 13.4 - Length of Stay, Destinations and Lodging Type (cont'd)
Interior Region and Communities (%)

	Glennallen	Delta Junction	Healy	Copper Center	Chicken
Average length of stay in Alaska	16.6	15.2	13.2	14.5	14.4
Regions Visited					
Southeast	25	23	23	45	39
Southcentral	97	80	88	99	68
Interior	100	100	100	100	100
Southwest	3	3	5	3	3
Far North	5	7	3	6	9
Destinations Visited, Top 10					
Juneau	11	9	15	31	7
Ketchikan	8	7	12	29	3
Skagway	10	10	14	31	25
Anchorage	87	72	84	95	62
Glacier Bay Nat'l Park	4	5	4	21	5
Seward	54	37	55	45	38
Denali Nat'l Park	60	62	87	79	45
Fairbanks	59	90	59	50	56
Hoonah/Icy Strait Point	3	3	3	7	
Talkeetna	38	35	55	52	16
Lodging Types Used					
Cruise ship	5	3	11	27	2
Hotel/motel	55	57	72	71	36
Lodge	17	17	23	35	7
B&B	14	7	24	13	9
Vacation rental	6	3	10	5	2
Friends/family	27	35	22	15	15
Campground/RV	48	36	20	33	58
Wilderness camping	12	8	7	4	22
State ferry	4	5	4	1	4

TABLE 13.5 - Statewide Activities – Top 10
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Shopping	75	72	77	71	69
Wildlife viewing	45	73	81	68	47
Cultural activities	39	58	63	65	41
Day cruises	39	53	62	53	26
Hiking/nature walk	34	48	51	44	40
Train	32	47	57	47	14
City/sightseeing tours	31	35	42	34	21
Fishing	16	15	14	13	26
Flightseeing	13	19	23	15	13
Tramway/gondola	13	14	16	11	4
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Shopping	70	69	77	71	66
Wildlife viewing	69	64	79	71	54
Cultural activities	60	53	64	65	56
Day cruises	42	32	48	48	30
Hiking/nature walk	58	53	69	66	46
Train	14	15	25	31	14
City/sightseeing tours	21	16	33	36	20
Fishing	30	19	17	19	15
Flightseeing	15	10	25	14	14
Tramway/gondola	13	4	16	21	1

TABLE 13.6 Activities in Community/Region
Interior Region and Communities (%)

	Interior	Denali	Fairbanks	Tok	Glennallen
Wildlife viewing	61	71	14	7	6
Birdwatching	9	9	6	4	2
Culture/History	33	11	49	4	2
Museums	17	6	26	2	1
Historical/cultural attractions	17	6	21	2	1
Native cultural tours/act.	6	2	8	-	-
Gold panning/mine tour	15	2	22	1	-
Day cruises	14	4	20	-	1
Hiking/nature walk	29	30	12	7	8
City/sightseeing tours	18	16	14	1	<1
Dog sledding	12	12	5	-	-
Flightseeing	6	6	2	-	-
Fishing	2	<1	2	<1	3
Unguided	2	<1	1	<1	3
Guided	<1	<1	<1	-	-
Tramway/gondola	-	-	-	-	-
Salmon bake/crab feed	5	1	7	-	-
Shows/Alaska entertainment	6	6	3	<1	-
Camping	7	6	4	13	9
Rafting	4	4	<1	-	-
ATV/4-wheeling	4	3	1	-	2
Kayaking/canoeing	1	<1	1	-	1
Hot springs	6	-	10	1	-
Biking	1	<1	1	2	1
Zipline	1	1	<1	-	-
Northern lights viewing	4	2	3	1	1
Hunting	1	-	<1	-	-
Other	1	<1	1	-	-

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

TABLE 13.6 Activities in Community/Region (Cont'd)
Interior Communities (%)

	Delta Junction	Healy	Copper Center	Chicken
Wildlife viewing	14	14	9	7
Birdwatching	4	6	1	1
Culture/History	1	5	3	12
Museums	-	3	2	<1
Historical/cultural attractions	1	2	<1	1
Native cultural tours/act.	-	-	<1	-
Gold panning/mine tour	<1	-	1	11
Day cruises	-	-	-	-
Hiking/nature walk	11	10	11	4
City/sightseeing tours	2	<1	1	1
Dog sledding	-	1	-	-
Flightseeing	<1	2	<1	-
Fishing	6	<1	4	-
Unguided	5	<1	4	-
Guided	1	-	2	-
Tramway/gondola	-	-	-	-
Salmon bake/crab feed	<1	1	1	-
Shows/Alaska entertainment	<1	-	-	-
Camping	10	5	8	7
Rafting	-	1	5	-
ATV/4-wheeling	2	6	2	2
Kayaking/canoeing	1	<1	1	-
Hot springs	-	-	-	-
Biking	1	<1	-	1
Zipline	-	2	-	-
Northern lights viewing	<1	1	-	<1
Hunting	-	<1	-	3
Other	3	<1	-	-

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

TABLE 13.7 - Satisfaction Ratings
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Satisfaction with overall Alaska experience					
Very satisfied	75	75	76	73	69
Satisfied	23	23	23	25	25
Compared to expectations					
Much higher	29	29	31	30	32
Higher	36	35	36	33	25
About as expected	32	33	30	34	39
Value for the money, compared to other destinations					
Much better	15	10	10	11	12
Better	23	18	18	19	17
About the same	45	49	48	50	47
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)					
Very likely to recommend Alaska	79	79	80	77	78
Very likely to return to Alaska in next five years	40	33	25	35	45
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Satisfaction with overall Alaska experience					
Very satisfied	77	76	82	77	63
Satisfied	20	22	17	20	30
Compared to expectations					
Much higher	31	34	40	26	35
Higher	35	29	34	54	25
About as expected	29	33	23	16	35
Value for the money, compared to other destinations					
Much better	8	18	9	6	14
Better	20	22	18	10	21
About the same	49	42	46	56	42
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	79	83	88	84	71
Very likely to return to Alaska in next five years	42	53	40	33	41

TABLE 13.8 - Previous Alaska Travel
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Been to Alaska	40	34	26	36	51
Average # of vacation trips (base: repeaters)	4.1	3.6	2.7	3.2	5.5
Previously traveled in Alaska by cruise ship	16	12	13	13	16
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Been to Alaska	48	50	33	40	40
Average # of vacation trips (base: repeaters)	7.2	3.2	3.9	4.8	3.1
Previously traveled in Alaska by cruise ship	13	11	12	20	13

TABLE 13.9 - Trip Planning
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Trip Decision, by Quarter					
Before July 2015	14	15	17	17	19
July-Sept 2015	17	16	18	15	16
Oct-Dec 2015	17	18	21	20	12
Jan-Mar 2016	23	23	23	22	20
Apr-Jun 2016	20	20	17	19	24
July-Sept 2016	8	7	5	7	9
Trip Booking, by Quarter					
Before July 2015	6	4	5	5	2
July-Sept 2015	11	10	12	9	5
Oct-Dec 2015	15	15	18	16	6
Jan-Mar 2016	27	27	29	27	11
Apr-Jun 2016	29	29	25	28	39
July-Sept 2016	13	14	10	15	37
Internet including apps and Travel Agent Usage					
Used internet	68	71	70	71	64
Booked over internet	58	59	58	57	40
Used TravelAlaska.com	18	26	28	25	25
Received Official State Vacation Planner	12	20	22	18	21
Booked through travel agent	35	34	41	35	12
Other Sources – Top 10					
Friends/family/co-workers	51	48	48	48	34
Prior experience	23	19	15	19	28
Cruise line	22	13	17	12	1
Brochures	15	22	23	23	29
AAA	8	12	13	12	11
Other travel guide/book	6	12	13	11	17
Tour company	5	6	7	6	2
Magazine	5	7	8	7	9
Television	4	4	4	5	4
Milepost	4	11	10	11	44

TABLE 13.9 - Trip Planning (Cont'd)
Interior Region and Communities (%)

	Glennallen	Delta Junction	Healy	Copper Center	Chicken
Trip Decision, by Quarter					
Before July 2015	19	20	17	14	14
July-Sept 2015	14	13	17	17	20
Oct-Dec 2015	19	16	22	18	9
Jan-Mar 2016	23	18	19	29	25
Apr-Jun 2016	17	23	17	14	19
July-Sept 2016	8	10	7	9	12
Trip Booking, by Quarter					
Before July 2015	1	1	3	3	3
July-Sept 2015	5	4	6	11	5
Oct-Dec 2015	12	13	16	11	7
Jan-Mar 2016	24	17	31	33	11
Apr-Jun 2016	36	37	28	26	29
July-Sept 2016	21	28	17	16	45
Internet including apps and Travel Agent Usage					
Used internet	79	73	86	89	64
Booked over internet	61	56	75	71	38
Used TravelAlaska.com	28	29	42	25	31
Received Official State Vacation Planner	28	26	30	35	17
Booked through travel agent	12	15	13	25	12
Other Sources – Top 10					
Friends/family/co-workers	45	50	54	40	32
Prior experience	31	26	20	26	27
Cruise line	4	4	4	12	
Brochures	34	33	30	33	31
AAA	17	15	15	24	11
Other travel guide/book	16	16	18	23	18
Tour company	5	4	4	10	4
Magazine	12	16	10	14	10
Television	4	5	3	4	8
Milepost	40	32	28	32	38

TABLE 13.10 - Top 10 Websites/Apps Used to Plan/Book Interior Region and Communities (%)

	All Visitors		Interior		Denali		Fairbanks		Tok	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	49	47	47	44	47	45	28	26
Cruise line websites	35	27	25	18	30	22	25	18	3	1
Google	28	4	34	5	38	6	34	4	41	10
Trip Advisor	23	3	26	4	29	5	25	4	23	5
Expedia	14	10	16	12	16	13	14	11	15	11
Hotel/lodge/RV Park	11	10	15	12	15	11	13	10	21	12
Tour company websites	11	8	17	13	20	15	14	10	12	8
Car/RV rental websites	10	9	18	17	19	17	16	13	13	12
Travelocity	7	2	6	3	6	3	6	3	3	1
Facebook	7	<1	5	<1	6	<1	6	<1	7	<1
	Glennallen		**Delta Junction**		**Healy**		**Copper Center**		**Chicken**	
	Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**
Airline websites	48	46	51	48	49	48	58	48	30	30
Cruise line websites	7	5	4	5	12	6	17	10	1	2
Google	38	7	44	8	49	11	33	8	42	8
Trip Advisor	32	6	31	2	41	8	35	9	30	3
Expedia	16	9	21	14	20	17	16	17	12	9
Hotel/lodge/RV Park	18	12	15	12	25	16	20	21	20	12
Tour company websites	17	14	12	12	19	15	23	21	11	7
Car/RV rental websites	22	19	30	21	28	25	32	28	19	18
Travelocity	9	3	6	2	7	4	12	3	7	5
Facebook	6	<1	12	1	11	<1	5	-	10	1

TABLE 13.11 - Demographics
Interior Region and Communities (%)

	All Visitors	Interior	Denali	Fairbanks	Tok
Origin					
Western US	38	30	26	30	36
Southern US	21	23	24	23	18
Midwestern US	15	19	20	17	15
Eastern US	10	12	13	11	5
Canada	7	4	3	3	14
Other International	9	12	14	16	12
Other Demographics					
Average party size	2.4	2.3	2.4	2.2	2.0
Average group size	4.2	3.9	4.3	3.7	2.8
Male/female	49/51	50/50	49/51	51/49	52/48
Average age	53.7	55.2	56.2	55.3	56.2
Children in household	23	18	18	18	12
Retired/semi-retired	44	47	50	46	60
College graduate	63	66	69	64	52
Average income	$114,000	$109,000	$111,000	$107,000	$93,000
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Origin					
Western US	30	32	37	29	32
Southern US	21	19	18	28	7
Midwestern US	15	18	20	15	10
Eastern US	10	13	13	13	6
Canada	5	5	1	4	25
Other International	18	13	11	11	21
Other Demographics					
Average party size	2.3	2.1	2.4	2.4	2.0
Average group size	2.7	3.4	3.6	3.2	4.2
Male/female	54/46	54/46	52/48	48/52	55/45
Average age	54.2	51.5	52.8	54.1	56.4
Children in household	16	18	17	15	11
Retired/semi-retired	53	44	42	54	53
College graduate	61	62	66	71	62
Average income	$96,000	$93,000	$117,000	$106,000	$101,000

TABLE 13.12 – Visitor Expenditures, Per Person
Interior Region and Communities

	All Visitors	Interior	Denali	Fairbanks	Tok
Average per-person total spent in Alaska	$1,057	$1,474	$1,575	$1,495	$1,401
Average per-person total spent in region/community		441	244	391	119
Lodging		146	74	141	43
Tours/activity/entertainment		78	83	36	-
Gifts/souvenirs/clothing		44	26	39	12
Food/beverage		103	49	99	30
Rental cars/fuel/transportation		52	6	66	33
Other		18	6	10	2
	Glennallen	**Delta Junction**	**Healy**	**Copper Center**	**Chicken**
Average per-person total spent in Alaska	$1,785	$1,563	$2,044	$1,526	$1,330
Average per-person total spent in region/community	66	62	282	107	50
Lodging	21	6	94	27	5
Tours/activity/entertainment	-	9	31	23	7
Gifts/souvenirs/clothing	3	6	10	3	11
Food/beverage	15	28	47	27	12
Rental cars/fuel/transportation	17	13	11	16	14
Other	8	-	89	11	-

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Section 14: Summary Profiles - Southwest and Far North Regions and Communities

McDowell GROUP

Summary Profiles: Southwest and Far North Regions and Communities

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

TABLE 14.1 - Market Definition and Sample Size
Southwest and Far North Regions and Communities

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Southwest	Visited at least one destination in the Southwest region, day and/or overnight	4%	84,000	291	±5.1%
Kodiak	Visited Kodiak, day and/or overnight	2%	40,000	117	±7.1%
Far North	Visited at least one destination in the Far North region, day and/or overnight	2%	33,000	160	±5.7%

The Southwest attracted 4 percent of the visitor market in summer 2016, while the Far North attracted 2 percent. Kodiak attracted 2 percent. Small sample sizes suggest caution when viewing the results in this chapter.

The Southwest and Kodiak visitor markets are distinctive in several ways.

- Business only and business/pleasure travelers made up an especially large percentage of visitors to the Southwest region (22 percent fell into one of these two categories).
- Only 18 percent of Southwest visitors travelled by cruise ship while in Alaska, compared to more than half of all Alaska visitors. A third of Kodiak visitors were cruise travelers.
- While Southwest visitors were less likely to purchase multi-day packages, those that did were more likely to purchase fishing packages. This was especially true for Kodiak visitors.
- The average length of stay among Southwest visitors was 14.5 nights, several nights more than the average Alaska visitor. Nearly all Southwest visitors also travelled to Southcentral (91 percent), though relatively few visited other regions of the state.
- Southwest visitors were most likely to report staying at a hotel/motel (49 percent), lodge (24 percent), or private home (24 percent).
- The most common activity reported by Southwest visitors was wildlife viewing. Fewer reported shopping compared to most other regions of the state. Nearly half reported participating in fishing, cultural activities, and hiking/nature walks.
- Over half of Southwest and Kodiak visitors said they were very likely to return to the state in the next five years. Close to three out of five had previously traveled to Alaska.
- Thirty-seven percent of Southwest and 42 percent of Kodiak visitors booked their travel arrangements between April and June 2016. Visitors to these regions were also more likely to book their travel by internet (67 to 69 percent did so).

- Visitors to Kodiak spent less per person on their Alaska trip ($2,270), compared to Southwest visitors as a whole ($3,367).

The Far North visitor market differed in some unique ways.

- One-quarter of Far North visitors were business travelers, and an additional 4 percent were traveling for business/pleasure. Just 56 percent were traveling for vacation/pleasure.
- Three-quarters of Far North visitors travelled to Alaska by air, 12 percent by cruise, and 15 by highway/ferry.
- The average length of stay among Far North travelers was 15.7 nights. Eighty-seven percent also visited Southcentral, and more than half also visited the Interior while in Alaska.
- Nearly two-thirds of Far North visitors had previously been to Alaska.
- Far North visitors skewed male (55 percent) and travelled in smaller party sizes, on average (1.7 people).
- Far North visitors spent an average of $2,431 per person on their Alaska trip.

TABLE 14.2 - Trip Purpose and Packages
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Trip Purpose				
Vacation/pleasure	79	64	70	56
Visiting friends/rel.	13	14	15	14
Business only	5	11	6	26
Business/pleasure	3	11	9	4
Purchased multi-day package (including cruise)				
Yes	64	47	47	27
Package type (Base: non-cruise, purchased package)				
Fishing lodge	49	60	82	-
Rail package	11	1	-	10
Wilderness lodge	10	13	5	15
Adventure tour	9	9	6	9
Motorcoach tour	8	3	-	14
Rental car/RV package	6	3	1	3
Hunting	2	7	-	14

TABLE 14.3 - Transportation Modes
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Transportation Market				
Cruise	55	18	33	12
Air	40	81	65	73
Highway/ferry	5	2	2	15
Used to Travel Between Communities				
Tour bus/van	15	5	3	26
Rental vehicle	14	17	12	20
Alaska Railroad	14	3	2	20
Personal vehicle	9	9	8	20
Air	9	66	47	55
Rental RV	2	2	2	3
State ferry	2	3	4	6
Personal RV	1	1	1	6

TABLE 14.4 - Length of Stay, Destinations and Lodging Type
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Average length of stay in Alaska	9.2	14.8	14.5	15.7
Regions Visited				
Southeast	67	21	37	21
Southcentral	52	91	86	87
Interior	29	14	12	57
Southwest	4	100	100	9
Far North	2	3	1	100
Destinations Visited, Top 10				
Juneau	61	19	35	13
Ketchikan	58	18	35	11
Skagway	48	2	2	15
Anchorage	47	90	86	84
Glacier Bay Nat'l Park	29	2	3	5
Denali Nat'l Park	23	11	10	36
Seward	23	16	12	28
Fairbanks	17	7	6	55
Hoonah/Icy Strait Point	13	15	32	2
Talkeetna	11	8	4	19
Lodging Types Used				
Cruise ship	57	17	33	12
Hotel/motel	37	49	36	65
Lodge	15	24	16	20
B&B	4	8	6	9
Vacation rental	3	6	7	1
Friends/family	15	24	25	25
Campground/RV	6	6	3	16
Wilderness camping	2	11	3	11
State ferry	1	1	2	2

TABLE 14.5 - Statewide Activities – Top 10
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Shopping	75	52	60	42
Wildlife viewing	45	68	70	66
Cultural activities	39	39	58	41
Day cruises	39	17	18	33
Hiking/nature walk	34	46	47	28
Train	32	3	2	22
City/sightseeing tours	31	17	28	18
Fishing	16	44	39	16
Flightseeing	13	18	8	19
Tramway/gondola	13	5	10	8

TABLE 14.6 Activities in Community/Region
Southwest and Far North Regions and Communities (%)

	Southwest	Kodiak	Far North
Wildlife viewing	50	38	24
Birdwatching	11	9	11
Hiking/nature walk	31	31	11
Fishing	41	32	8
Unguided	18	16	7
Guided	25	17	1
Culture/History	16	23	12
Museums	9	14	2
Historical/cultural attractions	5	8	3
Native cultural tours/act.	3	2	8
Gold panning/mine tour	-	-	<1
Flightseeing	12	7	5
City/sightseeing tours	1	2	7
Day cruises	3	6	2
Camping	11	2	12
Kayaking/canoeing	5	4	3
Rafting	3	1	1
Hunting	5	-	6
Shows/Alaska entertainment	-	-	-
Tramway/gondola	-	-	-
ATV/4-wheeling	4	5	5
Salmon bake/crab feed	3	4	-
Biking	1	1	2
Dog sledding	-	-	-
Northern lights viewing	-	-	2
Hot springs	-	-	-
Zipline	-	-	-
Other	1	1	<1

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

TABLE 14.7 - Satisfaction Ratings
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Satisfaction with overall Alaska experience				
Very satisfied	75	75	74	74
Satisfied	23	23	24	23
Compared to expectations				
Much higher	29	26	29	23
Higher	36	35	34	31
About as expected	32	36	35	44
Value for the money, compared to other destinations				
Much better	15	12	14	11
Better	23	20	14	28
About the same	45	49	51	45
Likelihood to recommend and return to Alaska				
Very likely to recommend Alaska	79	83	82	75
Very likely to return to Alaska in next five years	40	60	54	51

TABLE 14.8 - Previous Alaska Travel
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Been to Alaska	40	62	54	63
Average # of vacation trips (base: repeaters)	4.1	6.2	7.1	3.9
Previously traveled in Alaska by cruise ship	16	16	19	12

TABLE 14.9 - Trip Planning
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Trip Decision, by Quarter				
Before July 2015	14	11	4	15
July-Sept 2015	17	22	21	10
Oct-Dec 2015	17	13	9	18
Jan-Mar 2016	23	18	22	19
Apr-Jun 2016	20	23	26	22
July-Sept 2016	8	14	18	17
Trip Booking, by Quarter				
Before July 2015	6	3	2	2
July-Sept 2015	11	7	4	5
Oct-Dec 2015	15	10	5	11
Jan-Mar 2016	27	25	24	21
Apr-Jun 2016	29	37	42	30
July-Sept 2016	13	17	23	31
Internet including apps and Travel Agent Usage				
Used internet	68	78	82	68
Booked over internet	58	67	69	56
Used TravelAlaska.com	18	15	11	17
Received Official State Vacation Planner	12	9	8	9
Booked through travel agent	35	18	20	22
Other Sources – Top 10				
Friends/family/co-workers	51	49	46	43
Prior experience	23	39	31	39
Cruise line	22	4	5	8
Brochures	15	14	15	13
AAA	8	3	2	5
Other travel guide/book	6	8	7	8
Tour company	5	6	7	5
Magazine	5	6	6	9
Television	4	4	6	4
Milepost	4	3	3	12

TABLE 14.10 -Top 10 Websites/Apps Used to Plan/Book
Southwest and Far North Regions and Communities (%)

	All Visitors		Southwest		Kodiak		Far North	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	61	62	55	59	54	52
Cruise line websites	35	27	11	11	17	19	9	7
Google	28	4	29	7	27	7	35	4
Trip Advisor	23	3	18	3	13	2	18	1
Expedia	14	10	14	12	14	13	17	13
Hotel/lodge/RV Park	11	10	14	15	9	11	9	7
Tour company websites	11	8	18	10	17	8	11	11
Car/RV rental websites	10	9	10	7	8	7	11	8
Travelocity	7	2	4	2	4	2	5	4
Facebook	7	<1	9	-	10	-	5	-

TABLE 14.11 - Demographics
Southwest and Far North Regions and Communities (%)

	All Visitors	Southwest	Kodiak	Far North
Origin				
Western US	38	52	61	45
Southern US	21	12	7	17
Midwestern US	15	17	12	14
Eastern US	10	8	9	7
Canada	7	4	7	5
Other International	9	8	4	13
Other Demographics				
Average party size	2.4	2.1	2.0	1.7
Average group size	4.2	3.0	2.7	2.9
Male/female	49/51	58/42	56/44	55/45
Average age	53.7	51.1	54.0	53.3
Children in household	23	26	20	19
Retired/semi-retired	44	36	41	40
College graduate	63	67	64	56
Average income	$114,000	$123,000	$110,000	$121,000

TABLE 14.12 – Visitor Expenditures, Per Person
Southwest and Far North Regions and Communities

	All Visitors	Southwest	Kodiak	Far North
Average per-person total spent in Alaska	$1,057	$3,367	$2,270	$2,431
Average per-person total spent in region/community		1,423	853	826
Lodging		101	142	44
Tours/activity/entertainment		107	121	45
Gifts/souvenirs/clothing		36	41	11
Food/beverage		148	213	43
Rental cars/fuel/transportation		62	34	19
Other		970	301	664

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Section 15: Summary Profiles –

Adventure, Culture, and Fishing Markets

McDowell GROUP

Summary Profiles: Adventure, Culture, and Fishing Markets

This chapter profiles a number of niche markets of interest to Alaska's travel industry. Definitions for each community and sample sizes are provided in the table below.

TABLE 15.1 - Market Definition and Sample Size
Selected Visitor Markets

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Adventure Package	Purchased a multi-day adventure travel package i.e. hiking, biking, kayaking, rafting	1%	11,000	63	±12.3%
Culture	Participated in one or more of the following activities: museums, historical/cultural attractions, Native cultural tours/activities, gold panning/mine tour	39%	730,000	2,391	±2.0%
Native Culture	Participated in one or more Native cultural tours/activities	12%	221,000	632	±3.9%
Guided fishing	Participated in guided fishing	10%	192,000	842	±3.4%
Unguided fishing	Participated in unguided fishing	8%	146,000	769	±3.5%

Readers are advised to interpret survey results for the adventure package market with some caution, due to the low sample size (63) and associated high margin of error.

Visitors who purchased a multi-day adventure package had a number of unique characteristics.

- Nearly all were traveling for vacation/pleasure and arrived/departed Alaska by air. Almost none traveled by cruise ship while in Alaska.
- Nearly all adventure travelers visited Southcentral and over half visited the Interior. Top destinations in common included Anchorage (96 percent), Seward (64 percent), and Denali National Park (55 percent).
- While two-thirds of Alaska visitors travelled to Southeast, only one in five of adventure travelers did.
- Visitors in this market were more likely to use all modes of travel between communities. Half said their Alaska trip included travel by tour bus and a third by rental vehicle, Alaska Railroad, and air.
- Three-quarters stayed in a hotel/motel, and a third stayed in a lodge. In addition, travelers in this market used niche lodging opportunities more often than the average Alaska visitor. A quarter participated in wilderness camping, and roughly 15 percent stayed at B&Bs, vacation rentals, and private homes.
- Adventure travelers were also more likely to participate in certain activities, including day cruises and flightseeing.

- Three-quarters booked portions of their travel online. The websites/apps most commonly used for booking included airline websites (52 percent) and tour company websites (36 percent).
- While 84 percent were very satisfied with their Alaska trip, and 71 percent said it exceeded their expectations, only 2 percent said their trip was a much better value compared to other destinations.
- These visitors were generally more affluent (average household income of $137,000), more likely to have a college degree, and younger than the average Alaska visitor.
- Compared to the average Alaska visitor, adventure travelers were more likely to have visited Alaska by cruise ship previously (20 percent had done so).
- Almost no Canadians were part of the adventure travel market, despite making up 7 percent of the overall Alaska market. However, other international visitors made up a disproportionally large share of the adventure market, at 21 percent.

In this report, two cultural tour markets are considered. A more narrow market is defined focusing on those that had participated in Native culture tours or activities. A broader cultural market also includes those who visited museums and other historical/cultural attractions.

These two markets shared many characteristics with the overall Alaska market, but also had some differences.

- Both markets were more likely to visit Alaska by cruise ship than the overall Alaska market. This was especially true for the Native culture market, three-quarters of which travelled by cruise ship.
- Less than a third of these markets had been to Alaska previously, and those that were repeat travelers had been fewer times than the overall Alaska market.
- Native culture visitors were less likely to be traveling for the purpose of visiting friends/family.
- Both markets skewed older, with an average age of 54.6 for the cultural market and 56.6 for the Native culture market. Both were also slightly more likely to have a college degree and be retired/semi-retired.
- Participants in Native culture spent an average of $997 while in Alaska, while overall culture participants spent an average of $1,134. This compares to the statewide average of $1,057.

The guided and unguided fishing markets were distinct in several ways.

- Most fishing parties travelled to Alaska by air. While a quarter of guided fishing parties traveled to Alaska by cruise, almost no unguided fishermen did so. Conversely, unguided fishermen were more likely to travel to the state by highway/ferry than guided fishermen or the average Alaska visitor.
- Forty percent of the unguided fishing market reported traveling to Alaska for the purpose of visiting friends/relatives, compared to only 11 percent of the guided fishing market. Over half of unguided fishing parties reported staying in private homes.
- Nine percent of unguided fishermen were business/pleasure travelers, more than double the percentage of guided fishing parties.

- Roughly half of guided fishermen purchased a multi-day fishing lodge package.
- For both markets, visitors were most likely to visit Southcentral (around 70 percent). Guided fishing visitors were comparatively more likely to visit Southeast Alaska, with 45 percent doing so compared to only 30 percent of unguided fishermen.
- Fishing markets were more likely to include repeat Alaska visitors. Half of guided and three-quarters of unguided fishing parties had previously been to the state.
- While the average repeat visitor had been to Alaska 4.1 times, those in the guided fishing market had been an average of 5.2 times and those in the unguided fishing market had been an impressive 7.7 times previously.
- Both fishing markets were roughly two thirds male and younger than the average Alaska visitor. Both these trends were slightly more pronounced in the unguided fishing market.
- Average household income was much higher for the guided fishing market ($132,000) than the unguided fishing market ($107,000).
- Guided fishing participants spent an average of $2,464 per person in Alaska, while unguided fishing participants spent an average of $1,554.

TABLE 15.2 - Trip Purpose and Packages
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Trip Purpose						
Vacation/pleasure	79	91	86	91	84	50
Visiting friends/rel.	13	5	11	6	11	40
Business only	5	-	1	1	1	2
Business/pleasure	3	4	3	2	4	9
Purchased multi-day package (including cruise)						
Yes	64	100	68	82	54	10
Package type (Base: non-cruise, purchased package)						
Fishing lodge	49	-	17	8	89	64
Rail package	11	-	21	27	2	6
Wilderness lodge	10	-	13	8	2	8
Adventure tour	9	100	13	5	2	7
Motorcoach tour	8	-	20	35	1	1
Rental car/RV package	6	-	9	6	3	3
Hunting	2	-	-	-	1	8

TABLE 15.3 - Transportation Modes
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Transportation Market						
Cruise	55	-	63	77	22	2
Air	40	95	33	21	73	89
Highway/ferry	5	5	4	2	5	10
Used to Travel Between Communities						
Tour bus/van	15	49	25	28	12	2
Rental vehicle	14	34	17	13	27	23
Alaska Railroad	14	36	23	25	10	3
Personal vehicle	9	11	8	4	11	28
Air	9	32	9	9	23	26
Rental RV	2	4	3	1	4	5
State ferry	2	5	3	3	3	5
Personal RV	1	-	2	1	4	6

TABLE 15.4 - Length of Stay, Destinations and Lodging Type
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Average length of stay in Alaska	9.2	11.8	10.0	9.6	10.1	13.7
Regions Visited						
Southeast	67	22	70	82	45	30
Southcentral	52	96	61	57	68	72
Interior	29	64	43	39	26	25
Southwest	4	18	4	5	13	11
Far North	2	4	2	2	1	3
Destinations Visited, Top 10						
Juneau	61	10	66	79	29	12
Ketchikan	58	<1	62	77	27	12
Skagway	48	1	52	63	21	3
Anchorage	47	96	56	51	62	66
Glacier Bay Nat'l Park	29	7	28	30	12	1
Denali Nat'l Park	23	55	38	36	23	15
Seward	23	64	33	31	31	25
Fairbanks	17	35	27	24	11	13
Hoonah/Icy Strait Point	13	-	17	24	6	1
Talkeetna	11	28	18	18	14	11
Lodging Types Used						
Cruise ship	57	-	62	76	22	2
Hotel/motel	37	75	44	43	51	34
Lodge	15	38	20	20	37	14
B&B	4	18	6	5	8	8
Vacation rental	3	15	3	2	9	10
VFR	15	13	13	7	15	52
Campground/RV	6	10	7	4	10	17
Wilderness camping	2	24	2	1	3	9
State ferry	1	<1	1	1	1	2

TABLE 15.5 - Statewide Activities – Top 10
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Shopping	75	70	79	78	65	62
Wildlife viewing	45	96	61	57	54	61
Cultural activities	39	60	100	100	29	31
Day cruises	39	70	49	56	30	18
Hiking/nature walk	34	80	45	48	32	45
Train	32	37	39	44	17	4
City/sightseeing tours	31	19	44	57	14	8
Fishing	16	5	12	6	100	100
Flightseeing	13	58	15	15	17	6
Tramway/gondola	13	7	17	18	6	3

TABLE 15.6 - Satisfaction Ratings
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Satisfaction with overall Alaska Trip						
Very satisfied	75	84	79	83	76	73
Satisfied	23	15	20	17	20	25
Compared to expectations						
Much higher	29	36	31	35	32	23
Higher	36	35	38	39	37	35
About as expected	32	29	29	25	26	37
Value for the money, compared to other destinations						
Much better	15	2	15	13	14	15
Better	23	17	21	24	23	25
About the same	45	50	47	46	41	43
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	79	82	81	85	82	81
Very likely to return to Alaska in next five years	40	27	31	28	54	72

TABLE 15.7 - Previous Alaska Travel
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Been to Alaska before	40	37	31	27	52	72
Average # of vacation trips (base: repeaters)	4.1	1.9	3.4	2.8	5.2	7.7
Previously traveled in Alaska by cruise ship	16	20	16	14	18	14

TABLE 15.8 - Trip Planning
Adventure, Culture, and Fishing Markets (%)

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Trip Decision, by Quarter						
Before July 2015	14	17	16	21	12	6
July-Sept 2015	17	12	19	18	24	21
Oct-Dec 2015	17	13	19	20	15	12
Jan-Mar 2016	23	39	24	24	26	27
Apr-Jun 2016	20	18	17	15	18	21
July-Sept 2016	8	2	5	3	5	13
Trip Booking, by Quarter						
Before July 2015	6	<1	6	10	3	<1
July-Sept 2015	11	11	12	13	12	6
Oct-Dec 2015	15	16	16	17	16	10
Jan-Mar 2016	27	34	30	31	29	25
Apr-Jun 2016	29	32	27	23	28	37
July-Sept 2016	13	5	10	6	12	21
Internet and Travel Agent Usage						
Used internet	68	86	72	70	77	82
Booked over internet	58	74	60	58	68	75
Used TravelAlaska.com	18	49	25	23	19	16
Received Official State Vacation Planner	12	16	16	15	14	12
Booked through travel agent	35	24	38	47	18	5
Other Sources – Top 10						
Friends/family/co-workers	51	46	54	56	50	66
Prior experience	23	12	18	15	33	47
Cruise line	22	3	26	27	8	1
Brochures	15	22	21	16	17	16
AAA	8	6	11	12	6	6
Other travel guide/book	6	13	10	10	6	4
Tour company	5	26	7	6	5	1
Magazine	5	3	7	6	6	4
Television	4	4	5	6	5	3
Milepost	4	4	6	3	7	8

**TABLE 15.9 - Top 10 Websites/Apps Used to Plan/Book
Adventure, Culture, and Fishing Markets (%)**

	All Visitors		Adventure		Cultural		Native Culture		Guided Fishing		Unguided Fishing	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	67	52	48	47	46	46	57	60	68	71
Cruise line websites	35	27	5	5	40	31	51	45	13	10	4	3
Google	28	4	42	10	34	4	31	2	31	6	23	6
Trip Advisor	23	3	34	8	31	4	30	3	23	3	10	3
Expedia	14	10	11	4	17	10	14	8	14	10	12	9
Hotel/lodge/RV Park	11	10	18	8	12	10	12	9	15	15	10	10
Tour company websites	11	8	56	36	16	11	15	9	15	10	7	5
Car/RV rental websites	10	9	19	14	12	10	10	8	17	15	15	12
Travelocity	7	2	8	1	9	3	10	1	6	3	6	4
Facebook	7	<1	2	-	9	<1	6	-	6	<1	4	-

**TABLE 15.10 - Demographics
Adventure, Culture, and Fishing Markets (%)**

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Origin						
Western US	38	35	33	34	45	58
Southern US	21	17	22	21	20	14
Midwestern US	15	14	16	16	21	15
Eastern US	10	12	12	12	8	7
Canada	7	<1	6	6	2	3
Other International	9	21	12	11	4	2
Other Demographics						
Average party size	2.4	2.2	2.5	2.6	2.6	2.4
Average group size	4.2	5.7	4.2	4.8	4.2	3.3
Male/female	49/51	50/50	47/53	45/55	63/37	65/35
Average age	53.7	50.3	54.6	56.6	51.7	49.8
Children in household	23	21	22	21	25	28
Retired/semi-retired	44	27	48	51	41	34
College graduate	63	73	69	69	64	55
Average income	$114,000	$137,000	$112,000	$110,000	$132,000	$107,000

**TABLE 15.11 – Average Spending in Alaska, Per Person, Per Trip
Excluding Transportation to/from Alaska
Adventure, Culture, and Fishing Markets**

	All Visitors	Adventure	Cultural	Native Culture	Guided Fishing	Unguided Fishing
Average per-trip spending	$1,057	*	$1,134	$997	$2,464	$1,554

*Sample size insufficient for analysis.

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Section 16: Summary Profiles –

Independent, Small Ship, Independent Cruise, B&B, and Group Markets

McDowell GROUP

Summary Profiles: Independent, Small Ship, Independent Cruise, B&B, and Group Markets

This chapter profiles a number of niche markets of interest to Alaska's travel industry. Definitions for each community and sample sizes are provided in the table below.

TABLE 16.1 - Market Definition and Sample Size
Selected Visitor Markets

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Independent	Did not purchase multi-day package	36%	662,000	3,242	±1.7%
Independent Cruisers	Spent nights in Alaska on their own before or after a cruise or cruise/tour package	6%	110,000	339	±10.8%
Small Cruise Ship	Overnighted for at least one night on a cruise ship under 250 passengers in capacity	1%	12,000	82	±5.3%
B&B	Spent at least one night in a B&B	4%	82,000	401	±4.9%
Group Travelers	Traveling in a group of six or more people	17%	318,000	796	±3.5%

Independent travelers made up 36 percent of the Alaska visitor market in 2016. Besides not purchasing a multi-day package, they had a number of characteristics that made them unique.

- They were more likely to be travelling to visit friends/family, and more than a third stayed in a private home while in Alaska.
- A third rented a vehicle while in Alaska and another quarter used a personal vehicle.
- Independent travelers were more likely to visit Southcentral and the Interior and less likely to visit Southeast. Only 9 percent visited Juneau, while 71 percent visited Anchorage.
- Their activities were less likely to include a train, shopping, city/sightseeing tours, and day cruises – but more likely to include fishing, hiking/nature walk, and wildlife viewing.
- Six in ten had been to Alaska previously.
- They were more likely to book parts of their travel online and few used travel agents. Almost half waited until April through June 2016 to book their Alaska trip.
- Independent travelers were generally younger, less likely to be retired, and travelled in slightly smaller group, compared to the average Alaska traveler.

Independent cruisers spent additional time in Alaska before or after their cruise. This market had a number of interesting characteristics.

- Their average length of stay in Alaska was 10.9 nights, somewhat longer than the overall market.
- Independent cruisers were more likely to participate in all activities except fishing (only 7 percent fished).
- They reported higher levels of satisfaction compared to the overall market, and 88 percent said they were very likely to recommend Alaska. However, only 28 percent said they were very likely to return to Alaska in the next five years.
- Compared to the average Alaska visitor, they were more likely to be from the Southern U.S. (30 percent vs. 21 percent) and less likely to be from the Western U.S. (20 percent vs. 38 percent).
- On average, they were older and wealthier than the overall Alaska market. Over half were retired or semi-retired.

The small cruise market includes those that spent at least one night on a cruise ship with fewer than 250 passengers.

- The small cruise market averaged 61.0 years old, with an annual household income of $147,000 and a high percentage of college graduates. Only ten percent had children in their household.
- This market tended to book their travel early, with over a third booking by December 2015.
- Only 8 percent of small cruisers had been on an Alaska cruise before, compared to 16 percent of the overall market. Only 20 percent said they were very likely to return within 5 years.
- They were less likely to say their trip was a much better value compared to other destinations, but more likely to report being very satisfied.
- Wildlife viewing and hiking/nature walk were the most commonly reported activities for this market.

The B&B market differed from the overall Alaska market in several ways.

- Four out of five traveled to Alaska by air and only 13 percent were cruise travelers.
- They were much more likely to use a rental vehicle or state ferry to travel between communities and more likely to participate in a number of activities, including fishing, wildlife viewing, and hiking/nature walking.
- Only one-quarter purchased a multi-day package while in Alaska.
- Southcentral was the most common region they visited, followed by the Interior. Only a third went to Southeast.
- B&B travelers spent an average of $2,194 on their Alaska trip, more than double the overall average.

"Group Travelers" are those traveling in a group of six or more.

- The group travel market is dominated by vacation/pleasure travelers (90 percent). Almost three-quarters were cruise travelers.
- On average, they stayed only 8.2 nights in Alaska, a shorter stay than is typical in the overall market.
- Eighty percent of group travelers that did not travel by cruise purchased other multi-day packages. The most common type was fishing packages, followed by motorcoach packages.
- Almost a third of group travelers lived in households with children. They were also more wealthy, with an average household income of $125,000.
- Forty-two percent of group travelers booked their travel through travel agents.
- Group travelers spent an average of $895 per person while in Alaska.

TABLE 16.2 - Trip Purpose and Packages
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Trip Purpose						
Vacation/pleasure	79	44	99	96	75	90
Visiting friends/rel.	13	35	1	3	18	7
Business only	5	13	<1	-	4	1
Business/pleasure	3	8	<1	1	2	2
Purchased multi-day package (including cruise)						
Yes	64	-	100	100	26	80
Package type (Base: non-cruise, purchased package)						
Fishing lodge	49	-	-	-	*	58
Rail package	11	-	-	-	*	6
Wilderness lodge	10	-	-	-	*	5
Adventure tour	9	-	-	-	*	7
Motorcoach tour	8	-	-	-	*	11
Rental car/RV package	6	-	-	-	*	4
Hunting	2	-	-	-	*	1

*Sample size too small for analysis.

TABLE 16.3 - Transportation Modes
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Transportation Market						
Cruise	55	-	100	100	13	73
Air	40	88	-	-	81	26
Highway/ferry	5	12	-	-	6	1
Used to Travel Between Communities						
Tour bus/van	15	3	43	25	13	15
Rental vehicle	14	31	19	15	60	11
Alaska Railroad	14	5	43	23	17	12
Personal vehicle	9	25	2	-	12	5
Air	9	15	8	35	25	6
Rental RV	2	5	1	1	1	2
State ferry	2	4	<1	1	7	1
Personal RV	1	4	<1	-	<1	1

TABLE 16.4 - Length of Stay, Destinations and Lodging Type
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Average length of stay in Alaska	9.2	10.4	10.9	12.4	10.8	8.2
Regions Visited						
Southeast	67	21	99	90	31	78
Southcentral	52	76	95	47	85	41
Interior	29	40	44	36	54	22
Southwest	4	6	1	6	8	3
Far North	2	4	1	8	4	1
Destinations Visited, Top 10						
Juneau	61	9	98	81	24	75
Ketchikan	58	6	94	34	13	73
Skagway	48	5	87	12	11	61
Anchorage	47	71	89	45	82	37
Glacier Bay Nat'l Park	29	1	24	32	8	35
Denali Nat'l Park	23	25	42	34	43	19
Seward	23	28	66	23	47	21
Fairbanks	17	23	16	13	23	11
Hoonah/Icy Strait Point	13	<1	46	18	2	12
Talkeetna	11	15	22	13	29	10
Lodging Types Used						
Cruise ship	57	-	97	100	12	72
Hotel/motel	37	49	91	87	59	28
Lodge	15	11	20	19	25	15
B&B	4	9	8	19	100	2
Vacation rental	3	7	3	-	7	4
VFR	15	38	2	3	17	6
Campground/RV	6	15	3	4	6	4
Wilderness camping	2	5	<1	-	6	2
State ferry	1	2	<1	<1	3	<1

TABLE 16.5 - Statewide Activities – Top 10
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Shopping	75	61	77	56	66	78
Wildlife viewing	45	55	62	90	77	38
Cultural activities	39	33	57	54	48	39
Day cruises	39	26	60	36	44	43
Hiking/nature walk	34	47	47	78	65	29
Train	32	7	61	27	24	35
City/sightseeing tours	31	13	50	36	21	39
Fishing	16	30	7	7	30	18
Flightseeing	13	9	25	17	17	18
Tramway/gondola	13	7	18	11	11	18

TABLE 16.6 - Satisfaction Ratings
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Satisfaction with overall Alaska Trip						
Very satisfied	75	71	86	87	76	77
Satisfied	23	26	13	12	22	22
Compared to expectations						
Much higher	29	26	31	40	19	29
Higher	36	35	41	40	49	39
About as expected	32	36	25	18	28	30
Value for the money, compared to other destinations						
Much better	15	13	12	8	5	16
Better	23	20	24	29	20	22
About the same	45	46	44	45	46	50
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	79	78	88	85	82	80
Very likely to return to Alaska in next five years	40	62	28	20	40	35

TABLE 16.7 - Previous Alaska Travel
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Been to Alaska	40	59	25	24	42	35
Average # of vacation trips (base: repeaters)	4.1	5.5	1.9	2.1	4.6	4.3
Previously traveled in Alaska by cruise ship	16	11	15	8	13	19

TABLE 16.8 - Trip Planning
Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Trip Decision, by Quarter						
Before July 2015	14	7	30	35	13	18
July-Sept 2015	17	12	19	25	14	25
Oct-Dec 2015	17	11	16	19	14	21
Jan-Mar 2016	23	24	14	14	28	19
Apr-Jun 2016	20	32	17	6	21	13
July-Sept 2016	8	14	5	1	9	4
Trip Booking, by Quarter						
Before July 2015	6	1	14	13	2	7
July-Sept 2015	11	3	20	18	7	17
Oct-Dec 2015	15	8	21	37	13	21
Jan-Mar 2016	27	23	18	25	31	26
Apr-Jun 2016	29	44	19	6	33	20
July-Sept 2016	13	23	7	1	14	9
Internet and Travel Agent Usage						
Used internet	68	80	73	78	89	64
Booked over internet	58	73	61	70	80	48
Used TravelAlaska.com	18	20	30	18	34	16
Received Official State Vacation Planner	12	12	19	15	20	13
Booked through travel agent	35	7	52	36	16	42
Other Sources – Top 10						
Friends/family/co-workers	51	57	45	43	55	53
Prior experience	23	34	15	12	25	20
Cruise line	22	1	36	39	5	27
Brochures	15	17	14	23	24	16
AAA	8	6	9	4	10	6
Other travel guide/book	6	7	11	15	14	5
Tour company	5	2	6	10	4	6
Magazine	5	5	4	4	7	5
Television	4	3	4	1	3	5
Milepost	4	9	3	-	9	2

TABLE 16.9 - Top 10 Websites/Apps Used to Plan/Book Selected Visitor Markets (%)

	All Visitors		Inde-pendent		Ind't Cruisers		Small Cruise Ship		B&B		Group Travelers	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	60	62	50	51	55	61	64	57	51	54
Cruise line websites	35	27	3	2	60	48	54	38	12	8	42	33
Google	28	4	27	6	41	2	30	5	36	7	30	3
Trip Advisor	23	3	18	4	34	4	33	8	36	8	25	5
Expedia	14	10	15	12	18	14	11	9	20	16	13	10
Hotel/lodge/RV Park	11	10	14	12	20	19	11	11	20	17	11	10
Tour company websites	11	8	9	6	16	8	28	16	18	14	14	8
Car/RV rental websites	10	9	18	17	13	9	10	6	27	24	9	7
Travelocity	7	2	6	3	9	5	5	4	5	2	7	2
Facebook	7	<1	4	<1	8	-	2	-	7	<1	10	-

TABLE 16.10 - Demographics Selected Visitor Markets (%)

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Origin						
Western US	38	51	20	27	43	31
Southern US	21	17	30	20	16	21
Midwestern US	15	13	16	19	15	19
Eastern US	10	7	16	13	10	11
Canada	7	5	4	-	3	7
Other International	9	6	14	21	14	10
Other Demographics						
Average party size	2.4	2.1	2.6	2.3	2.2	3.6
Average group size	4.2	2.8	3.9	4.4	2.7	13.2
Male/female	49/51	55/45	46/54	45/55	51/49	49/51
Average age	53.7	49.0	57.0	61.0	52.4	51.0
Children in household	23	25	21	10	18	31
Retired/semi-retired	44	32	51	65	40	39
College graduate	63	60	72	79	76	66
Average income	$114,000	$106,000	$138,000	$147,000	$116,000	$125,000

TABLE 16.11 – Average Spending in Alaska, Per Person, Per Trip Excluding Transportation to/from Alaska Selected Visitor Markets

	All Visitors	Inde-pendent	Ind't Cruisers	Small Cruise Ship	B&B	Group Travelers
Average per-trip spending	$1,057	$1,162	$1,124	$1,350	$2,194	$895

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Section 17: Summary Profiles – Party Size and Repeat Visitors

McDowell GROUP

Summary Profiles: Party Size and Repeat Visitors

Two sets of profiles are provided in this chapter: the first set based on party size, and the second set based on repeat Alaska travel. Party size is the number of people with whom the survey respondent is sharing expenses. (A separate question asked for "group size," which could include people not sharing expenses.)

TABLE 17.1 - Market Definition and Sample Size
Party Size and Repeat Visitors

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
1-person	One person in traveling party	19%	296,000	1,536	±2.5%
2-person	Two people in traveling party	56%	872,000	3,086	±1.8%
3+ person	Three or more people in traveling party	25%	389,000	1,284	±2.7%
First-time visitors	First time to Alaska	60%	934,000	3,170	±1.7%
Repeat visitors	Visited Alaska previously	40%	623,000	2,756	±1.9%
Very likely to return	Very likely to return to Alaska	40%	623,000	2,750	±1.9%

Survey responses differed in several areas according to party size.

- Parties of two or more were primarily travelling for vacation/pleasure (87 percent) and cruising while in Alaska (62-68 percent), compared to only 44 percent and 20 percent of parties of one, respectively. A third of singles were travelling for business and a quarter to visit friends and relatives. Three-quarters of singles travelled to and from Alaska by air.

- Two person parties that purchased a multi-day, non-cruise package were much less likely to purchase fishing packages (37 percent) compared to other group sizes (61-62 percent).

- Single travelers were most likely to report travelling between communities by personal vehicle or air. Two person parties were more likely to travel by tour bus and/or Alaska Railroad than those in other party sizes.

- Over half of single travelers had been to Alaska before, compared to about a third of travelers in other party sizes. Repeat single travelers had also been to Alaska more times, on average, than repeat travelers in other party sizes.

- Single travelers spend an average of $1,578 per trip (average of 10.5 days), compared to $1,020 per person for two person parties (average of 9.2 days), and $679 for parties of three or more (whose trips averaged 8.2 days).

First-time, repeat, and very-likely-to-return travelers differed in a variety of ways.

- First-time visitors were much more likely to travel by cruise, and less likely to travel for the purpose of visiting friends and relatives.
- Many of the differences between these groups can be attributed to a higher proportion of cruise travelers in first-time visitors. For instance, first-time visitors are more likely to visit Southeast Alaska (76 percent did so) and more likely to participate in shopping activities, day cruises, and city/sightseeing tours.
- Repeat travelers and very-likely-to-return travelers exhibited very similar characteristics and trip patterns.

TABLE 17.2 - Trip Purpose and Packages
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Trip purpose				
Vacation/pleasure	79	44	87	87
Visiting friends or relatives	13	24	10	10
Business	5	22	1	1
Business and pleasure	3	10	2	2
Purchased multi-day package (including cruise)				
Yes	64	29	73	68
Package type (Base: non-cruise, purchased package)				
Fishing lodge	49	62	37	61
Rail package	11	2	15	14
Wilderness lodge	10	5	15	6
Adventure tour	9	9	10	8
Motorcoach tour	8	10	10	3
Rental car/RV package	6	2	7	7
Hunting	2	4	2	<1
		First-time visitors	**Repeat visitors**	**Very likely to return**
Trip purpose				
Vacation/pleasure		89	63	62
Visiting friends/rel.		7	22	23
Business only		2	9	9
Business/pleasure		2	5	6
Purchased multi-day package (including cruise)				
Yes		75	46	44
Package type (Base: non-cruise, purchased package)				
Fishing lodge		35	62	64
Rail package		14	8	8
Wilderness lodge		11	9	7
Adventure tour		12	7	5
Motorcoach tour		12	4	4
Rental car/RV package		9	3	3
Hunting		1	4	4

TABLE 17.3 - Transportation Modes
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Transportation Market				
Cruise	57	20	68	62
Air	38	74	27	35
Highway/ferry	5	6	5	3
Used to Travel Between Communities				
Tour bus/van	15	6	19	11
Rental vehicle	14	15	12	18
Alaska Railroad	14	5	18	11
Personal vehicle	9	18	8	7
Air	9	17	8	8
Rental RV	2	1	2	3
State ferry	2	2	2	2
Personal RV	1	1	2	1
		First-time visitors	**Repeat visitors**	**Very likely to return**
Transportation Market				
Cruise		70	38	36
Air		27	55	58
Highway/ferry		3	7	6
Used to Travel Between Communities				
Tour bus/van		19	9	7
Rental vehicle		13	16	18
Alaska Railroad		17	8	7
Personal vehicle		6	15	16
Air		7	13	14
Rental RV		2	2	2
State ferry		2	2	2
Personal RV		1	2	2

TABLE 17.4 - Length of Stay, Destinations and Lodging Type
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Average length of stay in Alaska	9.2	10.5	9.2	8.2
Regions Visited				
Southeast	67	38	75	70
Southcentral	52	60	52	45
Interior	29	25	32	24
Southwest	4	8	4	3
Far North	2	5	1	1
Destinations Visited, Top 10				
Juneau	61	27	70	66
Ketchikan	58	25	67	63
Skagway	48	16	57	53
Anchorage	47	56	47	41
Glacier Bay Nat'l Park	29	10	35	28
Denali Nat'l Park	23	12	28	21
Seward	23	15	25	26
Fairbanks	17	19	18	11
Hoonah/Icy Strait Point	13	5	16	12
Talkeetna	11	7	13	11
Lodging Types Used				
Cruise ship	57	20	67	62
Hotel/Motel	37	41	37	33
Lodge	15	12	17	12
Bed & Breakfast	4	4	5	4
Vacation Rental	3	3	2	5
Friends/Family	15	30	11	11
Campground/RV	6	5	6	7
Wilderness Camping	2	5	1	2
State Ferry	1	1	1	<1

TABLE 17.4 - Length of Stay, Destinations and Lodging Type (cont'd)
Party Size and Repeat Visitors (%)

	First-time visitors	Repeat visitors	Very likely to return
Average length of stay in Alaska	8.9	9.7	9.5
Regions Visited			
Southeast	76	53	51
Southcentral	49	56	56
Interior	32	25	24
Southwest	3	7	7
Far North	1	3	2
Destinations Visited, Top 10			
Juneau	72	44	42
Ketchikan	69	42	40
Skagway	58	33	30
Anchorage	45	51	52
Glacier Bay Nat'l Park	34	20	19
Denali Nat'l Park	28	15	14
Seward	27	18	20
Fairbanks	18	15	15
Hoonah/Icy Strait Point	17	7	9
Talkeetna	13	9	9
Lodging Types Used			
Cruise ship	69	38	36
Hotel/Motel	37	37	36
Lodge	16	13	12
Bed & Breakfast	4	5	4
Vacation Rental	3	4	4
Friends/Family	8	25	26
Campground/RV	5	7	7
Wilderness Camping	2	3	4
State Ferry	1	1	1

TABLE 17.5 - Statewide Activities – Top 10
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Shopping	75	54	79	80
Wildlife viewing	45	42	49	41
Cultural activities	39	23	43	44
Day cruises	39	19	44	43
Train	32	11	40	33
City/sightseeing tours	31	12	38	33
Hiking/nature walk	34	34	33	37
Fishing	16	23	13	18
Flightseeing	13	7	14	17
Tramway/gondola	13	6	16	10
		First-time visitors	**Repeat visitors**	**Very likely to return**
Shopping		80	66	68
Wildlife viewing		47	43	43
Cultural activities		45	31	30
Day cruises		47	26	28
Train		40	21	18
City/sightseeing tours		38	21	22
Hiking/nature walk		36	32	36
Fishing		11	25	26
Flightseeing		16	10	11
Tramway/gondola		14	10	10

TABLE 17.7 - Satisfaction Ratings
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Satisfaction with overall Alaska trip				
Very satisfied	75	69	76	75
Satisfied	23	27	22	22
Compared to expectations				
Much higher	29	28	30	27
Higher	36	30	36	39
About as expected	32	39	31	30
Value for the money				
Much better	15	17	15	17
Better	23	22	24	23
About the same	45	44	45	45
Likelihood to recommend and return to Alaska				
Very likely to recommend Alaska	79	76	81	79
Very likely to return to Alaska in next five years	40	65	34	33
		First-time visitors	**Repeat visitors**	**Very likely to return**
Satisfaction with overall Alaska trip				
Very satisfied		76	72	82
Satisfied		22	25	17
Compared to expectations				
Much higher		34	22	35
Higher		37	34	34
About as expected		26	42	30
Value for the money				
Much better		15	16	23
Better		22	26	26
About the same		46	44	37
Likelihood to recommend and return to Alaska				
Very likely to recommend Alaska		79	80	90
Very likely to return to Alaska in next five years		28	58	100

TABLE 17.8 - Previous Alaska Travel
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Been to Alaska before	40	58	35	35
Average # of vacation trips (base: repeaters)	4.1	5.1	3.8	3.8
Previously traveled in Alaska by cruise ship	16	13	18	16
		First-time visitors	**Repeat visitors**	**Very likely to return**
Been to Alaska before		-	100	58
Average # of vacation trips (base: repeaters)		-	4.1	5.5
Previously traveled in Alaska by cruise ship		-	41	18

TABLE 17.9 - Trip Planning
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Trip Decision, by Quarter				
Before July 2015	14	7	16	15
July-Sept 2015	17	10	17	23
Oct-Dec 2015	17	10	19	19
Jan-Mar 2016	23	21	25	22
Apr-Jun 2016	20	34	18	17
July-Sept 2016	8	18	7	4
Trip Booking, by Quarter				
Before July 2015	6	3	7	5
July-Sept 2015	11	4	11	15
Oct-Dec 2015	15	7	17	18
Jan-Mar 2016	27	19	28	30
Apr-Jun 2016	29	41	26	25
July-Sept 2016	13	25	11	8
Internet and Travel Agent Usage				
Used internet	68	69	66	75
Booked over internet	58	62	54	62
Used TravelAlaska.com	18	9	21	20
Received Official State Vacation Planner	12	6	13	13
Booked through travel agent	35	19	42	34
Other Sources – Top 10				
Friends/family	51	51	50	53
Prior experience	23	36	22	18
Cruise line	22	7	27	24
Brochures	15	9	17	15
AAA	8	3	10	7
Other travel/guide book	6	3	7	7
Tour company	5	3	6	5
Magazine	5	3	6	4
Television	4	5	5	3
Milepost	4	2	5	4

TABLE 17.9 - Trip Planning (Cont'd)
Party Size and Repeat Visitors (%)

	First-time visitors	Repeat visitors	Very likely to return
Trip Decision, by Quarter			
Before July 2015	17	9	10
July-Sept 2015	17	17	16
Oct-Dec 2015	18	16	13
Jan-Mar 2016	24	23	24
Apr-Jun 2016	18	24	25
July-Sept 2016	6	12	12
Trip Booking, by Quarter			
Before July 2015	7	3	3
July-Sept 2015	12	9	9
Oct-Dec 2015	16	13	12
Jan-Mar 2016	28	24	24
Apr-Jun 2016	26	33	34
July-Sept 2016	11	18	18
Internet and Travel Agent Usage			
Used internet	66	72	73
Booked over internet	53	64	66
Used TravelAlaska.com	21	15	16
Received Official State Vacation Planner	13	10	10
Booked through travel agent	43	23	22
Other Sources – Top 10			
Friends/family	52	49	55
Prior experience	3	55	37
Cruise line	27	16	15
Brochures	18	11	14
AAA	9	7	5
Other travel/guide book	8	4	5
Tour company	7	3	4
Magazine	5	4	5
Television	6	2	4
Milepost	4	5	4

TABLE 17.10 - Top 10 Websites/Apps Used to Plan/Book Party Size and Repeat Visitors (%)

	All Visitors		1-person		2-person		3+person	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	60	62	48	46	49	50
Cruise line websites	35	27	8	6	42	31	41	34
Google	28	4	20	3	29	4	29	4
Trip Advisor	23	3	8	1	26	4	28	5
Expedia	14	10	10	8	14	9	17	12
Hotel/lodge/RV Park	11	10	9	9	13	10	10	9
Tour company websites	11	8	9	6	12	9	11	7
Car/RV rental websites	10	9	8	8	11	9	11	10
Travelocity	7	2	6	3	7	2	9	2
Facebook	7	<1	5	<1	7	<1	7	1
			First-time visitors		Repeat visitors		Very likely to return	
			Plan	Book	Plan	Book	Plan	Book
Airline websites			45	43	58	60	58	58
Cruise line websites			44	34	23	18	22	18
Google			31	4	22	3	26	4
Trip Advisor			29	4	16	3	17	3
Expedia			17	11	11	8	13	10
Hotel/lodge/RV Park			12	9	11	11	12	10
Tour company websites			13	9	8	6	8	5
Car/RV rental websites			9	8	11	10	11	10
Travelocity			8	3	7	2	7	3
Facebook			8	<1	5	<1	7	1

TABLE 17.11 - Demographics
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Origin				
Western US	38	50	35	37
Southern US	21	17	22	23
Midwestern US	15	12	16	15
Eastern US	10	9	9	11
Canada	7	6	7	8
Other International	9	6	11	6
Other Demographics				
Average party size	2.4	1.0	2.0	4.3
Average group size	4.2	2.7	4.0	5.9
Male/female	49/51	58/42	48/52	49/51
Average age	53.7	51.8	58.8	44.3
Children in household	23	24	13	44
Retired/semi-retired	44	33	53	31
College graduate	63	58	63	67
Average income	$114,000	$99,000	$112,000	$130,000
		First-time visitors	**Repeat visitors**	**Very likely to return**
Origin				
Western US		29	52	49
Southern US		22	19	19
Midwestern US		16	13	13
Eastern US		12	6	8
Canada		7	7	7
Other International		13	3	4
Other Demographics				
Average party size		2.5	2.2	2.2
Average group size		4.8	3.4	3.4
Male/female		47/53	53/47	52/48
Average age		53.3	54.5	51.3
Children in household		24	22	24
Retired/semi-retired		41	47	37
College graduate		64	62	63
Average income		$111,000	$117,000	$118,000

TABLE 17.12 – Visitor Expenditures, Per Person
Party Size and Repeat Visitors (%)

	All Visitors	1-person	2-person	3+person
Average per-person total spent in Alaska	$1,057	$1,578	$1,020	$679
		First-time visitors	**Repeat visitors**	**Very likely to return**
Average per-person total spent in Alaska		$988	$1158	$1215

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Section 18: Summary Profiles – Cruise Type 2011 and 2016

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Summary Profiles: Cruise Type, 2011 versus 2016

This section shows survey results for cruise passengers, broken into three categories: round-trip, cross-gulf, and land tour. Results for both 2011 and 2016 are shown here (the 2011 AVSP report did not include results by cruise type).

TABLE 18.1 - Market Definition and Sample Size Cruise Type 2011 and 2016

Market	Definition	% of Alaska Market	Sample Size	Maximum Margin of Error
Round trip 2011	Cruised both in and out of Alaska in 2011	33%	812	±3.4%
Cross-gulf 2011	Cruised one-way in/out of Alaska in 2011; did not participate in land tour	9%	447	±4.7%
Land tour 2011	Cruised one-way in/out of Alaska in 2011; participated in overnight land tour	14%	789	±3.5%
Round trip 2016	See above; 2016	43%	767	±3.5%
Cross-gulf 2016	See above; 2016	9%	380	±5.0%
Land tour 2016	See above; 2016	11%	700	±3.7%

Cruise type had a significant impact on visitor travel patterns, with a few exceptions.

- Trip purpose was consistent for the various cruise types, with between 96 and 100 percent of passengers traveling for vacation/pleasure in both 2011 and 2016.
- Transportation modes used to travel between communities differed between cross-gulf and land tour passengers (round-trip passengers generally only used cruise ships to travel between communities). Land tour passengers were much more likely to use a tour bus/van (76 percent) compared with cross-gulf passengers (50 percent); they were also much more likely to use the Alaska Railroad (74 versus 30 percent). Other transportation modes were used rarely by both cruise types.
- Usage rates for both tour bus/van and Railroad declined among land tour passengers between 2011 and 2016: from 94 to 76 percent for tour bus/van and from 94 to 74 percent for Alaska Railroad. Changes in the survey question may have played a role in this decline; tour bus/van was called "motorcoach/bus" in 2011, while "Alaska Railroad" was simply "train" in 2011.
- Land tour passengers (naturally) reported the longest average trip length at 11.3 nights, followed by cross-gulf passengers at 8.8 nights, then round trip passengers at 7.5 nights.
- The average length of stay among each cruise type changed slightly between 2011 and 2016: from 7.0 to 7.5 nights among round trip passengers; from 9.5 to 8.8 nights among cross-gulf passengers; and from 11.6 to 11.3 nights among land tour passengers.

- Regions visited varied considerably by cruise type. Round-trip passengers generally only visited Southeast. Nearly all cross-gulf passengers visited both Southeast and Southcentral, while 21 percent visited the Interior. Nearly all land tour passengers visited Southeast, Southcentral, and the Interior. Only 1 to 2 percent of any cruise type visited Southwest or Far North.
- Between 2011 and 2016, the only significant change in regional visitation was among cross-gulf passengers: the percentage visiting the Interior dropped from 39 to 21 percent.
- Communities visited varied by cruise type, with round trip passengers visiting primarily Southeast ports; cross-gulf passengers showing high rates of Anchorage and Seward visitation; and land tour passengers showing higher rates for Interior destinations.
- Between 2011 and 2016, rates of visitation by cross-gulf passenger dropped for several communities: from 38 to 20 percent for Denali; from 24 to 8 percent for Fairbanks; and from 18 to 9 percent for Talkeetna. Visitation rates increased for Hoonah/Icy Strait Point (from 25 to 48 percent) and Seward (from 47 to 65 percent).
- Lodging varied by cruise type, with round trip passengers solely using their cruise ship for lodging; cross-gulf passengers also using hotels/motels (61 percent) but rarely lodges (9 percent); and land tour passengers using both hotels/motels (86 percent) and lodges (59 percent) heavily. All other lodging types were used by 2 percent or less of each cruise type.
- Between 2011 and 2016, usage of hotels/motels increased among both cross-gulf passengers (from 55 to 61 percent) and land tour passengers (from 77 to 86 percent). Lodge usage decreased among both cross-gulf passengers (from 21 to 9 percent) and land tour passengers (from 66 to 59 percent).
- Round trip passengers generally showed lower participation rates (with the exception of shopping), while land tour passengers showed higher participation rates, and cross-gulf passengers fell in between. For example, 35 percent of round trip passengers participated in cultural activities, compared with 49 percent of cross-gulf passengers and 69 percent of land tour passengers. Likewise, 40 percent of round trip passengers participated in day cruises, compared with 55 percent of cross-gulf passengers and 67 percent of land tour passengers.
- Activity rates shifted more than a few percentage points between 2011 and 2016 for several activities. Wildlife viewing rates fell for both round trip passengers (from 29 to 20 percent) and land tour passengers (from 81 to 74 percent). Day cruises increased among cross gulf passengers (from 43 to 55 percent). Hiking/nature walk increased among round trip passengers (from 14 to 19 percent); cross gulf passengers (from 27 to 35 percent); and land tour passengers (from 31 to 38 percent). Flightseeing fell among land tour passengers from 29 to 18 percent.
- Satisfaction rates were fairly consistent across the three cruise types, with between 75 and 81 percent of passengers saying they were very satisfied with their Alaska trip. Between 2011 and 2016, the very satisfied rate increased from 69 percent to 76 percent among round trip passengers and from 71 to 81 percent among cross gulf passengers, while it fell from 79 to 75 percent among land tour passengers.

- Expectation ratings were likewise consistent across the three cruise types in 2016. Like the "very satisfied" rate, the "much higher than expectations" rate increased among both round trip and cross gulf passengers, but fell among land tour passengers, between 2011 and 2016.
- Round trip passengers were more likely than cross gulf or land tour passengers to rate value for the money as "much better" than other vacation destinations: 20 percent, versus 10 and 12 percent, respectively. The "much better" rating rose for round trip passengers (from 14 to 20 percent) between 2011 and 2016, while staying about the same for cross-gulf and land tour passengers.
- Cross-gulf passengers were slightly more likely to recommend Alaska (85 percent very likely) compared with round trip passengers (79 percent) and land tour passengers (78 percent).
- Round trip and cross gulf passengers were more likely than land tour passengers to return to Alaska in the next five years (28 percent very likely among round trip and cross gulf passengers, versus 13 percent among land tour passengers).
- The repeat travel rate was slightly higher among round trip passengers (28 percent) than among cross-gulf passengers (23 percent) and land tour passengers (22 percent). Rates in 2016 were similar to 2011.
- The rate of those who had traveled to Alaska via cruise ship was slightly higher among round trip passengers (22 percent compared to 16 percent for both other markets). This question was not asked in 2011.
- Trip planning timelines (the time of year when passengers decided on and booked their Alaska trip) were fairly consistent across the three cruise types, and between 2011 and 2016.
- Usage of the internet to plan and book their trip was consistent among the three cruise types. Internet usage declined among all types between 2011 and 2016: from 73 to 61 percent among round trip passengers; from 79 to 59 percent among cross gulf passengers; and from 75 to 60 percent among land tour passengers. Booking rates were more consistent between the two years for all types.
- Travel agent usage was higher among land tour passengers (66 percent) than among cross gulf passengers (53 percent) and round trip passengers (51 percent).
- Round trip passengers were much more likely to be from the Western U.S. (35 percent) compared with cross-gulf passengers (23 percent) and land tour passengers (16 percent). Origin was fairly consistent between 2011 and 2016.
- Land tour participants reported the highest average age (61.5 years) followed by cross gulf passengers (57.0 years) and round trip passengers (54.9 years). Average age increased among all three cruise types by several years between 2011 and 2016.
- Land tour passengers reported the highest average spending in Alaska at $894 per person, followed by cross-gulf at $882 and round trip at $498. Between 2011 and 2016, spending stayed about the same among round trip passengers (from $502 to $498) while increasing among cross-gulf passengers (from $836 to $882) and land tour passengers (from $858 to $894). (Land tour passenger spending does not reflect spending on the accommodations, transportation, and tours in Alaska included in the tour package.)

TABLE 18.2 - Trip Purpose
By Cruise Type, 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Vacation/pleasure	98	96	99	100	97	99
Visiting friends/rel.	-	1	<1	<1	1	<1
Business only	<1	<1	-	<1	1	<1
Business/pleasure	2	2	1	<1	1	<1

TABLE 18.3 - Transportation Modes Used to Travel Between Communities
Cruise Type 2011 and 2016 (%)

	Cross-Gulf 2011	Land Tour 2011	Cross-Gulf 2016	Land Tour 2016
Tour bus/van	54	94	50	76
Alaska Railroad	41	94	30	74
Rental vehicle	16	5	9	6
Air	6	8	3	6
Personal vehicle	3	1	1	<1
Rental RV	2	<1	1	<1
State ferry	1	2	-	1
Personal RV	<1	-	<1	<1

Note: Round-trip passengers are excluded from this table, as they travel between communities via cruise ship, which was excluded from this question.

TABLE 18.4 - Length of Stay, Destinations and Lodging Type Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Average length of stay in Alaska	7.0	9.5	11.6	7.5	8.8	11.3
Regions Visited						
Southeast	99	98	100	100	99	99
Southcentral	5	94	97	2	97	97
Interior	1	39	96	<1	21	95
Southwest	2	2	1	2	<1	<1
Far North	-	1	3	-	<1	2
Destinations Visited, Top 10						
Juneau	98	96	93	100	99	97
Ketchikan	94	94	93	98	98	96
Skagway	73	89	91	76	94	94
Anchorage	4	85	80	2	90	83
Glacier Bay Nat'l Park	22	28	37	56	22	42
Denali Nat'l Park	1	38	95	<1	20	94
Seward	1	47	37	1	65	45
Fairbanks	1	24	69	<1	8	58
Hoonah/Icy Strait Point	8	25	23	16	48	25
Talkeetna	<1	18	39	-	9	34
Lodging Types Used						
Cruise ship	95	96	96	100	97	98
Hotel/Motel	1	55	77	<1	61	86
Lodge	<1	21	66	<1	9	59
Bed & Breakfast	-	7	2	-	2	2
Vacation Rental	n/a	n/a	n/a	-	2	1
Friends/Family	<1	3	1	<1	1	<1
Campground/RV	-	3	<1	-	1	1
Wilderness Camping	-	<1	-	-	-	<1
State Ferry	<1	-	<1	-	-	-

TABLE 18.5 - Statewide Activities – Top 10
Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Shopping	78	83	81	88	80	82
Wildlife viewing	29	51	81	20	55	74
Cultural activities	29	54	72	35	49	69
Day cruises	35	43	65	40	55	67
Train	37	61	90	37	57	86
City/sightseeing tours	46	51	53	41	49	54
Hiking/nature walk	14	27	31	19	35	38
Fishing	3	15	8	3	7	6
Flightseeing	13	22	29	12	24	18
Tramway/gondola	10	19	19	16	18	20

TABLE 18.7 - Satisfaction Ratings
Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Satisfaction with overall Alaska trip						
Very satisfied	69	71	79	76	81	75
Satisfied	28	26	20	22	17	24
Compared to expectations						
Much higher	25	26	36	31	30	29
Higher	37	42	37	36	39	34
About as expected	35	28	25	30	28	35
Value for the money						
Much better	14	11	12	20	10	12
Better	24	23	26	28	24	19
About the same	53	55	47	42	50	50
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	79	79	82	79	85	78
Very likely to return to Alaska in next five years	23	24	15	28	28	13

TABLE 18.8 - Previous Alaska Travel
Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Been to Alaska before	25	21	21	28	23	22
Average # of vacation trips (base: repeaters)	2.5	2.5	1.5	2.6	2.2	1.7
Previously traveled in Alaska by cruise ship	n/a	n/a	n/a	22	16	16

TABLE 18.9 - Trip Planning
Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011		Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Trip Decision, by Quarter							
Before July 2010	19	16	24	Before July 2015	17	22	20
July-Sept 2010	20	20	21	July-Sept 2015	19	17	20
Oct-Dec 2010	19	24	17	Oct-Dec 2015	20	18	25
Jan-Mar 2011	24	24	23	Jan-Mar 2016	25	17	19
Apr-Jun 2011	15	12	9	Apr-Jun 2016	14	19	12
July-Sept 2011	3	4	2	July-Sept 2016	5	8	3
Trip Booking, by Quarter							
Before July 2010	9	3	6	Before July 2015	8	11	9
July-Sept 2010	16	14	14	July-Sept 2015	14	18	19
Oct-Dec 2010	19	21	26	Oct-Dec 2015	19	19	21
Jan-Mar 2011	30	38	34	Jan-Mar 2016	31	18	30
Apr-Jun 2011	21	18	15	Apr-Jun 2016	21	23	17
July-Sept 2011	6	7	3	July-Sept 2016	8	11	5
Internet and Travel Agent Usage							
Used internet	73	79	75	Used internet	61	59	60
Booked over internet	45	53	44	Booked over internet	47	49	45
Used TravelAlaska.com	19	27	30	Used TravelAlaska.com	16	21	21
Received Official State Vacation Planner	10	26	27	Received Official State Vacation Planner	8	14	19
Booked through travel agent	62	71	80	Booked through travel agent	51	53	66
Other Sources – Top 10							
Friends/family	42	45	51	Friends/family	50	40	52
Prior experience	16	17	14	Prior experience	16	15	12
Cruise line	63	61	60	Cruise line	41	33	32
Brochures	20	27	27	Brochures	12	16	15
AAA	16	19	33	AAA	9	9	14
Other travel/ guide book	10	17	18	Other travel/ guide book	4	7	11
Tour company	6	10	17	Tour company	6	4	8
Magazine	5	7	6	Magazine	4	3	5
Television	7	6	8	Television	6	3	5
Milepost	<1	3	3	Milepost	1	1	1

TABLE 18.10 - Top 10 Websites/Apps Used to Plan/Book Cruise Type 2016 (%)

	Round Trip 2016		Cross-Gulf 2016		Land Tour 2016	
	Plan	Book	Plan	Book	Plan	Book
Airline websites	39	39	45	44	38	35
Cruise line websites	69	55	64	56	66	48
Google	27	2	33	1	27	1
Trip Advisor	28	4	31	4	25	2
Expedia	14	7	17	14	10	7
Hotel/lodge/RV Park	6	4	16	15	8	5
Tour company websites	8	5	13	5	16	11
Car/RV rental websites	2	1	7	5	4	3
Travelocity	10	2	9	3	5	3
Facebook	10	<1	6	-	5	-

Note: This question was not asked in 2011.

TABLE 18.11 - Demographics Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Origin						
Western US	32	24	17	35	23	16
Southern US	24	30	24	22	28	31
Midwestern US	10	20	26	14	17	21
Eastern US	10	11	18	9	13	17
Canada	10	6	8	12	7	3
Other International	14	10	7	9	14	12
Other Demographics						
Average party size	2.6	2.7	2.4	2.6	2.5	2.4
Average group size	6.3	6.4	6.3	5.2	4.9	4.9
Male/female	44/56	47/53	46/54	44/56	46/54	46/54
Average age	51.4	49.6	56.7	54.9	57.0	61.5
Children in household	24	24	17	24	23	15
Retired/semi-retired	45	44	57	49	52	59
College graduate	59	61	61	63	65	67
Average income	$106,000	$112,000	$107,000	$115,000	$126,000	$115,000

TABLE 18.12 – Visitor Expenditures, Per Person Cruise Type 2011 and 2016 (%)

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Average per-person total spent in Alaska	$502	$836	$858	$498	$882	$894

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Section 19: International Visitors

McDowell GROUP

Introduction

This section presents visitor volume and survey results for Alaska's international visitors in summer 2016, for the total market as well as the individual markets of Asia, Japan, Australia/New Zealand, United Kingdom, German-Speaking Europe (GSE), Germany, Switzerland, and Other Europe. For this report (and previous AVSP reports), the term "international" excludes Canadians. A profile of Canadian visitors is provided in Section 10.

The following table shows the sample sizes for each market profiled in this report, and their maximum margin of error.

TABLE 19.1 – International Market Sample Sizes

Market	Sample Size 2016	Margin of Error
International Visitors (excludes Canadians)	781	±3.5%
Asia (Japan, Korea, China, India, Thailand, Taiwan, Other Asia)	106	±9.5%
Japan	51	±13.7%
Australia/New Zealand	136	±8.4%
United Kingdom	115	±9.1%
German-Speaking Europe (Germany, Switzerland, Austria)	223	±6.5%
Germany	156	±7.8%
Switzerland	49	±13.4%
Other Europe	146	±8.1%

Readers are advised to interpret survey results for international submarkets with some caution, particularly the markets with the lowest sample sizes: Japan and Switzerland.

The sample of international visitors decreased substantially from AVSP 6, from 1,220 to 781 (on par with the 2006 sample of 703). A variety of factors contributed to this decrease.

- In 2011, online surveys represented 53 percent of all surveys; in 2016, that percentage went down to 13 percent. (The reasons for the shift to the intercept method are discussed in Section 2.) Thus, the option of filling out the survey online in a foreign language was given to many fewer visitors in 2016.
    - A total of 570 out of 1,220 international surveys were filled out online in 2011. That number went down to 181 in 2016.
    - In 2011, German was one of the languages offered online (replaced by Mandarin in 2016), and 150 German language surveys were submitted. In comparison, only 10 Mandarin surveys were submitted.
- International flight boarding procedures were streamlined between 2011 and 2016. In both survey years, surveyors were not allowed into the secure area for international flights (unlike domestic flights). However, in 2011, it took airlines longer to check in international passengers, which allowed more time for surveying. By 2016, airlines had gotten more efficient at processing passengers, making it more difficult to conduct the (fairly lengthy) survey with passengers in the check-in area.

As in 2011, McDowell Group took efforts to boost sample sizes among international visitors.

- The international air sample was given a much higher target sample than its volume would suggest, in relation to the entire visitor market. In 2016, international air passengers represented 0.9 percent of all visitor exits. International air surveys represented 7 percent of all surveys.
- Every Asian charter flight out of the Anchorage and Fairbanks airports was sampled. Japanese and Korean interpreters were hired to accompany the survey team for every Asian-bound flight. However, many fewer Asia-bound flights occurred in 2016, compared to 2011. The number of passengers aboard Asia-bound flights decreased from 4,801 in 2011 to 1,997 in 2016 – from 23 percent of international passengers, to 9 percent. This greatly limited the opportunities to boost Asian market sample sizes.

In addition to the above challenges, there are cultural and language barriers that introduce respondent bias, particularly in the Asian markets. Consequently, market size estimates presented in the following section should be seen as conservative.

International Visitor Volume

An estimated 167,000 international visitors, not including Canadians, traveled to Alaska in summer 2016, up from 154,000 in summer 2011. The following table shows estimated market sizes for individual countries and regions.

Note that the margins of error presented in the previous section refer to the survey responses based to each sub-sample – not to the international country/region percentages and volumes in the table below, which are based on the total international sample, with a maximum margin of ±3.5 percent.

- Europeans represented the largest portion of international visitors at 38 percent, down slightly from 42 percent in 2011. Volume, however, stayed about the same (from 64,000 to 63,000).
- The Australia/New Zealand market was nearly as big as the European market at 36 percent (61,000 visitors). This market increased their share of the international market from 27 to 36 percent, representing an increase in volume from 42,000 to 61,000. The New Zealand market grew at a higher rate, from 4 to 10 percent (from 6,000 to 17,000).
- The Asian market grew from 12 to 14 percent, or from 18,000 to 23,000 travelers. The Indian market appears to have grown faster, from 2 to 5 percent of all international travelers. (Note that representation of Asian markets may have been constrained in the survey sample by cultural and language barriers. These estimates should be considered conservative.)

TABLE 19.2 - Countries of Origin and Estimated Market Size

	% of Int'l 2011	% of Int'l 2016	Estimated Volume 2011	Estimated Volume 2016
Europe	**42%**	**38%**	**64,000**	**63,000**
United Kingdom	21	17	33,000	28,000
German-Speaking Europe	13	12	20,000	20,000
Germany	8	9	12,000	15,000
Switzerland	5	2	7,000	3,000
Austria	1	1	1,000	2,000
Other Europe	7	7	11,000	12,000
Netherlands	2	2	3,000	3,000
Italy	n/a	2	n/a	3,000
Australia/New Zealand	**27%**	**36%**	**42,000**	**61,000**
Australia	23	26	36,000	44,000
New Zealand	4	10	6,000	17,000
Asia	**12%**	**14%**	**18,000**	**23,000**
India	2	5	3,000	8,000
Japan	4	3	6,000	6,000
China	2	3	3,000	5,000
Korea	1	1	2,000	2,000
Latin America	**n/a**	**8%**	**n/a**	**14,000**
Mexico	6	3	8,000	4,000
Other International	**14%**	**4%**	**22,000**	**6,000**
Israel	n/a	2	n/a	3,000
TOTAL INTERNATIONAL	**100%**	**100%**	**154,000**	**167,000**

- The Latin American market, which was not measured separately in 2011, represented 8 percent (14,000) of international visitors.
- The "other international" market represented 4 percent (6,000) of international visitors. While it appears to have declined since 2011, most of the decline can be attributed to adding Latin America as its own region.

Following is a list of additional countries mentioned by survey respondents, along with the number of survey respondents for each country. The countries listed below each represent less than 1 percent of the international market. Such small sample sizes preclude drawing conclusions about estimated market size, but it is useful to see which countries were mentioned more, or less, often.

TABLE 19.3 - Additional International Countries with Number of Responses

Countries with more than one response		Countries with one response each
Spain (14)	Colombia (2)	American Samoa
Belgium (12)	Dubai (2)	Bermuda
France (11)	Indonesia (2)	Dominican Republic
Ireland (9)	Estonia (2)	Greenland
Denmark (9)	Finland (2)	Grenada
Norway (9)	Portugal (2)	Guam
Argentina (8)	Indonesia (2)	Guatemala
Czech Republic (6)		Honduras
South Africa (5)		Macedonia
Brazil (4)		Malta
Sweden (4)		Nicaragua
Russia (3)		Poland
Puerto Rico (3)		Romania
Philippines (3)		Taiwan
Croatia (3)		Virgin Islands

Trip Purpose

- Over nine out of ten international visitors (93 percent) were traveling for vacation/pleasure, significantly above the overall visitor rate of 79 percent. VFR rates were significantly lower at 4 percent (compared to 13 percent of all visitors), while only 2 percent of international visitors were traveling for business or business/pleasure, compared to 8 percent of all visitors.
- Vacation/pleasure rates for international markets ranged from 85 percent among Germans to 98 percent among those from Australia/New Zealand. Germans were the most likely international market to be VFRs (10 percent), while Japanese travelers were the most likely to be traveling for business (6 percent).
- International visitors' trip purpose was fairly consistent between 2011 and 2016: vacation/pleasure was 92 percent in 2011 and 93 percent in 2016; VFR was 3 and 4 percent, respectively; and business (combined) was 5 and 2 percent.

TABLE 19.4 - Trip Purpose
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Vacation/pleasure	79	93	86	94	98
Visiting friends/rel.	13	4	6	-	2
Business only	5	1	4	6	-
Business/pleasure	3	1	4	-	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Vacation/pleasure	92	88	85	95	87
Visiting friends/rel.	5	8	10	3	6
Business only	2	1	1	2	3
Business/pleasure	1	2	3	-	4

Packages

- Three-quarters of international visitors (75 percent) purchased a multi-day package as part of their Alaska trip, compared to the overall visitor rate of 64 percent. Australia/New Zealand visitors were the most likely to be package travelers (94 percent), while Germans were the least likely (40 percent).
- Non-cruise international visitors who purchased a package were fairly evenly distributed in terms of package type, ranging from 12 percent for motorcoach tour to 19 percent for adventure tour. They differed from the overall market, which was much more focused on fishing lodge packages. Sample sizes for individual markets were too small for analysis.
- The rate of package purchase decreased slightly between 2011 and 2016, from 78 percent of international visitors to 75 percent.
- Among international visitors who participated in a cruise, over half (56 percent) were on round-trip itineraries, lower than the overall market rate of 66 percent.

TABLE 19.5 - Packages
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Purchased multi-day package (including cruise)					
Yes	64	75	63	65	94
Package type (Base: non-cruise, purchased package)					
Fishing lodge package	49	13	-	*	*
Rail package	11	16	39	*	*
Wilderness lodge	10	14	24	*	*
Adventure tour	9	19	10	*	*
Motorcoach tour	8	12	25	*	*
Rental car/RV package	6	14	-	*	*
Hunting	2	-	-	*	*
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Purchased multi-day package (including cruise)					
Yes	78	41	40	43	48

Note: Sample size for all markets not shown were insufficient for analysis.

TABLE 19.6 – Cruise Type
International Visitors (%)

	All Visitors	International	Aust./NZ
Round trip	66	56	48
Cross-gulf	31	38	43
Cruise one-way, fly one-way	13	17	13
Cruise with land tour	18	21	30
In-state/small ship cruise	1	2	3
Other	1	3	6

Note: Sample size for all markets not shown were insufficient for analysis.

Transportation Modes

- Two-thirds of international visitors (68 percent) were cruise passengers; 28 percent were air visitors; and 4 percent were highway/ferry visitors. International visitors show a higher rate of cruise participation compared to the overall market (68 versus 55 percent), and a lower air visitor rate (28 versus 40 percent).
- Cruise passenger rates varied widely among individual markets, ranging from 25 percent of Swiss visitors to 92 percent of Australia/New Zealand visitors.
- International visitors relied most heavily on tour buses/vans to travel around Alaska (26 percent), followed by the Alaska Railroad at 21 percent. Both these rates are higher than the overall market (15 and 14 percent, respectively). International visitors are less likely than the overall market to use a personal vehicle (3 versus 9 percent).
- International visitors' transportation markets changed little between 2011 and 2016. The cruise market decreased slightly from 71 to 68 percent; the air market increased from 24 to 28 percent; and the highway/ferry market decreased from 6 to 4 percent.

TABLE 19.7 - Transportation Modes
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Transportation Market					
Cruise	55	68	48	27	92
Air	40	28	50	67	6
Highway/ferry	5	4	2	6	2
Used to Travel Between Communities					
Tour bus or van	15	26	29	56	37
Rental vehicle	14	1	21	8	2
Alaska Railroad	14	21	20	49	32
Air	9	8	11	15	5
Personal vehicle	9	3	1	-	2
Rental RV	2	4	2	-	<1
State ferry	2	3	-	-	1
Personal RV	1	1	<1	-	2

	UK	GSE	Germany	Switzerland	Other Europe
Transportation Market					
Cruise	67	32	33	25	34
Air	31	52	53	47	57
Highway/ferry	2	16	14	28	10
Used to Travel Between Communities					
Tour bus or van	19	16	16	12	8
Rental vehicle	16	28	26	31	36
Alaska Railroad	18	12	13	11	10
Air	10	11	10	17	16
Personal vehicle	5	7	8	5	6
Rental RV	3	16	15	29	11
State ferry	4	10	10	15	8
Personal RV	1	1	2	2	<1

Length of Stay

- International visitors stayed an average of 10.4 nights in summer 2016, slightly longer than the average among all visitors (9.2 nights).
- Average length of stay was longest among Swiss visitors (15.6 nights) and shortest among Japanese visitors (5.6 nights).
- International visitors' average length of stay increased only slightly between 2011 and 2016: from 10.2 nights to 10.4 nights.

TABLE 19.8 – Average Length of Stay
International Visitors

	All Visitors	International	Asia	Japan	Aust./NZ
Average length of stay in Alaska	9.2	10.4	9.8	5.6	9.5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average length of stay in Alaska	9.3	13.0	12.6	15.6	15.5

Lodging Type

- International visitors were most likely to use a cruise ship as lodging (66 percent), followed by hotel/motel (42 percent), and lodge (20 percent).
- Compared to the overall market, this market is more likely to stay on a cruise ship (66 versus 57 percent), slightly more likely to use hotels/motels (42 versus 37 percent), and slightly more likely to use lodges (20 versus 15 percent). Unsurprisingly, they are less likely to stay with friends/family (6 versus 15 percent).
- Lodging type varied widely by market. Japanese visitors were much more likely to use hotels/motels at 72 percent. Australia/New Zealand visitors were the most likely to use lodges at 29 percent. Swiss visitors were much more likely to use campgrounds/RVs at 48 percent. (Variation in cruise ship usage was discussed in the previous section.)
- Compared to 2011, international visitors in 2016 were more likely to use hotels/motels (from 35 to 42 percent); and more likely to use lodges (from 13 to 20 percent). Other usage rates were consistent.

TABLE 19.9 - Lodging Type
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Cruise ship	57	66	47	27	90
Hotel/motel	37	42	38	72	41
Lodge	15	20	15	16	29
B&B	4	7	8	3	3
Vacation rental	3	2	2	1	1
Friends/family	15	6	6	-	2
Campground/RV	6	9	6	-	3
Wilderness camping	2	4	3	-	1
State ferry	1	1	-	-	<1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Cruise ship	66	31	32	25	34
Hotel/motel	44	46	45	51	56
Lodge	15	15	15	18	18
B&B	5	15	15	8	19
Vacation rental	2	4	5	2	8
Friends/family	5	13	14	6	14
Campground/RV	6	33	31	48	21
Wilderness camping	4	10	9	8	15
State ferry	<1	3	4	1	3

Destinations

- International visitors were most likely to visit the Southeast region (75 percent), followed by Southcentral (57 percent), Interior (40 percent), Southwest (4 percent), and Far North (2 percent).
- Compared to the overall market, international visitors were more likely to visit Southeast (75 versus 67 percent), Southcentral (57 versus 52 percent), and the Interior (40 versus 29 percent). Visitation rates to Southwest and Far North were consistent with the overall market.
- Visitation rates to cruise ports were higher among international visitors, consistent with the market's larger proportion of cruise passengers. Additional destinations showing higher rates of visitation by international travelers included:
  - Anchorage (53 percent, versus 47 percent of overall market)
  - Seward (29 versus 23 percent)
  - Valdez (9 versus 4 percent)
  - Denali (36 versus 23 percent)
  - Fairbanks (30 versus 17 percent)
- Destinations varied widely by market, largely influenced by cruise and land tour behavior, as well as the GSE market's tendency towards travel by rental vehicle/RV.
  - For instance, Southeast was visited by 93 percent of the (heavily cruise-oriented) Australia/New Zealand market, but only 27 percent of the Japanese market.
  - The Interior was visited by 70 percent of the Swiss market, but only 36 percent of the UK market.
- Between 2011 and 2016, visitation by international travelers to Southeast dropped from 81 to 75 percent, while visitation to Southcentral increased from 48 to 57 percent, and visitation to the Interior increased from 33 to 40 percent. Visitation to Southwest and the Far North did not change.

TABLE 19.10 - Destinations Visited (Day or Overnight)
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Southeast	**67**	**75**	**51**	**27**	**93**
Juneau	61	69	50	26	91
Ketchikan	58	65	47	24	88
Skagway	48	58	22	-	78
Glacier Bay Nat'l Park	29	43	19	27	68
Hoonah/Icy Strait Point	13	15	21	-	16
Sitka	9	6	7	24	4
Haines	4	4	1	-	1
Prince of Wales Island	1	<1	-	-	1
Gustavus	1	1	-	-	1
Wrangell	1	2	-	-	2
Petersburg	1	1	-	-	1
Other Southeast	1	1	-	-	1
Southcentral	**52**	**57**	**57**	**74**	**53**
Anchorage	47	53	56	74	45
Kenai Peninsula	30	32	29	18	18
Seward	23	29	26	16	16
Homer	9	8	3	-	3
Other Kenai Peninsula	7	6	5	-	3
Kenai/Soldotna	7	5	5	3	2
Talkeetna	11	12	9	11	8
Whittier	10	13	11	9	10
Palmer/Wasilla	9	9	4	2	2
Girdwood/Alyeska	8	8	10	20	2
Portage	5	5	2	1	1
Valdez	4	9	10	-	1
Prince William Sound	2	5	3	3	3
Other Mat-Su	1	2	-	-	<1
Cordova	<1	1	-	-	<1
Other Southcentral	3	6	1	-	1
Interior	**29**	**40**	**45**	**63**	**37**
Denali Nat'l Park	23	36	38	54	35
Fairbanks	17	30	35	62	31
Tok	3	4	-	-	2
Glennallen	3	5	2	-	1
Healy	2	3	<1	-	<1
Delta Junction	2	3	3	-	<1
Copper Center	1	2	-	-	<1
Chicken	1	2	-	-	1
Other Interior	2	3	1	-	1
Southwest	**4**	**4**	**2**	**1**	**3**
Kodiak	2	1	2	1	-
Other Southwest	3	3	-	-	3
Far North	**2**	**2**	**2**	**8**	**3**
Coldfoot	1	1	1	3	2
Nome	<1	<1	-	-	1
Kotzebue	<1	<1	-	-	-
Other Far North	1	1	1	6	1

TABLE 19.10 - Destinations Visited (Day or Overnight) (cont'd)
International Visitors (%)

	UK	GSE	Germany	Switzerland	Other Europe
Southeast	**73**	**58**	**59**	**56**	**54**
Juneau	67	39	39	29	41
Ketchikan	67	23	24	28	35
Skagway	62	40	43	28	35
Glacier Bay Nat'l Park	33	19	19	20	27
Hoonah/Icy Strait Point	12	3	1	14	6
Sitka	9	4	3	5	5
Haines	3	15	16	16	10
Prince of Wales Island	-	<1	-	2	<1
Gustavus	1	3	1	2	1
Wrangell	2	3	3	3	6
Petersburg	1	3	3	-	1
Other Southeast	2	1	1	2	1
Southcentral	**54**	**70**	**68**	**86**	**70**
Anchorage	53	68	64	86	66
Kenai Peninsula	40	51	47	73	50
Seward	37	46	45	57	46
Homer	8	19	15	32	25
Other Kenai Peninsula	4	15	11	28	15
Kenai/Soldotna	3	10	8	27	15
Talkeetna	9	26	28	21	23
Whittier	10	16	14	27	28
Palmer/Wasilla	12	19	18	24	23
Girdwood/Alyeska	11	11	9	14	18
Portage	8	12	11	11	8
Valdez	9	23	20	29	22
Prince William Sound	6	6	6	5	9
Other Mat-Su	3	2	1	8	8
Cordova	1	1	1	-	3
Other Southcentral	5	16	14	25	17
Interior	**37**	**56**	**54**	**70**	**54**
Denali Nat'l Park	31	49	49	61	45
Fairbanks	25	41	40	47	38
Tok	1	18	17	29	10
Glennallen	4	14	13	22	17
Healy	5	8	9	5	7
Delta Junction	2	10	10	12	11
Copper Center	<1	5	5	5	7
Chicken	<1	11	10	18	6
Other Interior	4	9	7	11	8
Southwest	**6**	**5**	**3**	**13**	**11**
Kodiak	1	1	1	3	3
Other Southwest	5	3	3	10	7
Far North	**1**	**3**	**3**	**8**	**5**
Coldfoot	<1	1	1	5	3
Nome	<1	<1	<1	-	1
Kotzebue	-	1	1	-	-
Other Far North	1	2	2	5	2

Activities

- International visitors were most likely to participating in shopping (75 percent), wildlife viewing (58 percent), cultural activities (51 percent), and day cruises (49 percent).
- Compared to the overall market, international visitors were more likely to participate in the following activities:
    - Wildlife viewing (58 percent, versus 45 percent of the overall market)
    - Cultural activities (51 versus 39 percent) including museums (31 versus 22 percent) and historical/cultural attractions (22 versus 15 percent)
    - Day cruises (49 versus 39 percent)
    - Train (42 versus 32 percent)
    - Flightseeing (22 versus 13 percent)
- International visitors were less likely to participate in fishing (7 versus 16 percent).
- Activity participation rates varied widely among different markets.
    - Wildlife viewing rates ranged from 42 percent among Asian travelers to 83 percent among Swiss visitors.
    - Swiss visitors were the least likely to participate in cultural activities (34 percent); Australia/ New Zealand visitors were the most likely (57 percent).
    - Train usage rates varied from 16 percent among Swiss visitors to 53 percent among Australia/New Zealand visitors.
    - Hiking/nature walk rates ranged from 22 percent among Australia/New Zealand visitors to 70 percent among Swiss visitors.
    - GSE, German, and Swiss visitors were much more likely to participate in camping (26 percent, 24 percent, and 37 percent, respectively).
    - The Japanese market showed high rates of participation in hot springs (29 percent) and Northern Lights viewing (24 percent).
- Overall, participation rates among international visitors did not differ markedly from 2011 rates, with the following exceptions.
    - Cultural activities fell from 57 percent in 2011 to 51 percent in 2016. The largest drop was in historical/cultural attractions, which fell from 29 to 22 percent.
    - City/sightseeing tours fell from 45 to 31 percent.
    - Day cruise participation increased from 40 to 49 percent.

TABLE 19.11 - Statewide Activities
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Shopping	75	75	78	55	75
Wildlife viewing	45	58	42	78	56
Birdwatching	9	13	1	3	11
Cultural activities	39	51	52	47	57
Museums	22	31	28	16	37
Historical/cultural attractions	15	22	13	31	29
Native cultural tours/activities	12	15	15	-	20
Gold panning/mine tour	9	11	-	-	20
Day cruises	39	49	51	45	48
Hiking/nature walk	34	35	39	42	22
Train	32	42	33	39	53
White Pass/Yukon Route	22	33	19	-	49
Alaska Railroad	14	12	14	39	8
City/sightseeing tours	31	31	46	27	31
Fishing	16	7	5	-	3
Guided fishing	10	5	5	-	3
Unguided fishing	8	2	<1	-	<1
Flightseeing	13	22	31	10	14
Tramway/gondola	13	14	17	-	20
Dog sledding/kennel tour	11	14	19	2	19
Shows/Alaska entertainment	10	10	10	-	15
Salmon bake/crab feed	10	7	3	-	12
Business	7	2	8	10	-
Kayaking/canoeing	5	7	1	3	5
Camping	5	6	1	-	<1
ATV/4-wheeling/ORV/Jeep	4	3	3	-	2
Zipline	4	3	12	-	3
Rafting	3	2	1	-	2
Biking	3	4	2	2	1
Hot springs	2	5	9	29	1
Northern Lights viewing	2	3	10	24	1
Hunting	1	<1	-	-	-
Other	1	<1	2	-	-

TABLE 19.11 - Statewide Activities (cont'd)
International Visitors (%)

	UK	GSE	Germany	Switzerland	Other Europe
Shopping	73	70	69	78	68
Wildlife viewing	65	75	74	83	56
Birdwatching	12	21	19	24	24
Cultural activities	43	39	40	34	50
Museums	24	31	32	24	37
Historical/cultural attractions	18	12	10	11	14
Native cultural tours/ activities	14	6	7	3	10
Gold panning/mine tour	6	9	9	11	4
Day cruises	54	52	51	51	48
Hiking/nature walk	29	54	50	70	60
Train	43	32	36	16	19
White Pass/Yukon Route	29	21	22	5	11
Alaska Railroad	18	15	18	11	11
City/sightseeing tours	40	22	19	20	20
Fishing	7	15	10	32	12
Guided fishing	6	7	4	10	8
Unguided fishing	3	9	7	24	5
Flightseeing	31	16	19	7	24
Tramway/gondola	14	6	5	4	7
Dog sledding/kennel tour	12	6	4	2	4
Shows/Alaska entertainment	8	3	2	9	8
Salmon bake/crab feed	2	4	5	-	5
Business	2	2	2	-	5
Kayaking/canoeing	7	18	19	9	14
Camping	4	26	24	37	19
ATV/4-wheeling/ORV/Jeep	3	3	4	2	5
Zipline	4	-	-	-	<1
Rafting	2	3	3	6	2
Biking	2	6	7	2	8
Hot springs	5	13	12	11	8
Northern Lights viewing	4	5	5	9	3
Hunting	-	1	1	-	-
Other	1	-	-	-	-

Satisfaction

- Two-thirds of international visitors (65 percent) said they were very satisfied with their overall Alaska experience, lower than the overall market (75 percent).
- Japanese visitors reported the highest "very satisfied" rate at 81 percent. The Asian market (which includes the Japanese market) were the least satisfied, at 53 percent. However, another 45 percent of Asians were "satisfied", for a total satisfaction rate of 98 percent. (While the Japanese market constituted half of the Asian market in terms of unweighted sample, they represented a much smaller portion of the market after weighting. Other Asian markets gave much lower ratings, in comparison.)
- Germans and GSE visitors gave a higher very satisfied rating (73 percent) compared to other international visitors, while Swiss and Other European visitors gave slightly lower ratings (58 and 61 percent, respectively).
- Overall satisfaction among international visitors was essentially the same in 2016 as in 2011: 65 percent were very satisfied both years, while 33 percent were satisfied in 2011, compared to 32 percent in 2016.
- When asked how their Alaska trip compared to their expectations, international visitors responded very similarly to the overall market, with 28 percent saying much higher (compared to 29 percent of the overall market), 34 percent saying higher (compared to 36 percent), and 35 percent saying about as expected (compared to 32 percent).
- Japanese visitors were the most likely to say their trip turned out much higher than their expectations at 46 percent; Other Europeans were the least likely at 12 percent.
- The percentage of international visitors giving a "much higher" rating increased slightly between 2011 and 2016, from 23 percent to 28 percent.

TABLE 19.12 - Satisfaction Ratings
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Satisfaction with overall Alaska experience					
Very satisfied	75	65	53	81	64
Satisfied	23	32	45	18	36
Compared to expectations					
Much higher	29	28	23	46	24
Higher	36	34	31	16	32
About as expected	32	35	42	36	42
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Satisfaction with overall Alaska experience					
Very satisfied	83	73	73	58	61
Satisfied	14	25	25	34	26
Compared to expectations					
Much higher	49	24	24	20	12
Higher	32	36	33	45	50
About as expected	16	36	39	33	31

Value, Recommendation, and Likelihood of Returning

- International visitors tended to rate Alaska "about the same" as other vacation destinations in terms of value for the money at 49 percent, similar to the overall market (45 percent). About one-quarter (26 percent) rated Alaska better or much better – less than the overall market (38 percent).
- Japanese visitors were much more likely than other international visitors to give a better or much better rating (64 percent). GSE, German, Swiss, and Other Europeans were the least likely to give a better or much better rating (20 percent, 19 percent, 19 percent, and 17 percent, respectively).
- The percentage of international visitors giving a better or much better rating decreased from 33 percent in 2011 to 26 percent in 2016.
- Over two-thirds of international visitors (69 percent) said they were very likely to recommend Alaska as a vacation destination, lower than the overall visitor rate of 79 percent. UK, GSE, and German visitors gave the highest "most likely" ratings at 77 percent, 76 percent, and 76 percent, respectively. Asian and Other European visitors gave the lowest ratings at 58 and 59 percent, respectively.
- The percentage of international visitors saying they were very likely to recommend Alaska fell only slightly between 2011 and 2016, from 72 to 69 percent.
- One out of five international visitors (19 percent) said they were very likely to return to Alaska in the next five years, about half as many as the overall market (40 percent).
- GSE and German visitors were the mostly likely to return at 33 and 34 percent, respectively. Australia/ New Zealand and UK visitors were the least likely at 8 and 17 percent, respectively.
- The rate of those very likely to return was similar between 2011 and 2016 at 18 and 19 percent.

TABLE 19.13 – Value for the Money and Likelihood of Recommending/Returning to Alaska International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Value for the money, compared to other destinations					
Much better	15	9	13	23	8
Better	23	17	27	41	18
About the same	45	49	49	22	62
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	79	69	58	74	67
Very likely to return to Alaska in next five years	40	19	23	29	8
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Value for the money, compared to other destinations					
Much better	10	12	11	10	7
Better	20	8	8	9	10
About the same	40	45	46	36	41
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	77	76	76	71	59
Very likely to return to Alaska in next five years	17	33	34	23	26

Previous Alaska Travel

- One out of eight international visitors (12 percent) had been to Alaska before, a much smaller percentage than the overall market (40 percent). Swiss visitors showed the highest repeat rate at 32 percent; Japanese visitors showed the lowest at 7 percent.
- The repeat travel rate decreased slightly between 2011 and 2016, from 14 to 12 percent.
- The average number of previous Alaska trips among repeat international visitors was 3.3, lower than the overall average of 4.1. The only market with a sufficient sample size of repeaters was the GSE market, which reported an average number of 5.5 previous trips.
- The average number of previous trips among international visitors was the same in 2011 and 2016 at 3.3.
- Four percent of international visitors reported having traveled to Alaska by cruise ship previously, ranging from 3 percent among Asian, UK, and GSE visitors, to 6 percent among Other Europeans. (This question was not asked in 2011.)

TABLE 19.14 - Previous Alaska Travel
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Been to Alaska	40	12	9	7	9
Average # of vacation trips (base: repeaters)	4.1	3.3	*	*	*
Previously traveled by cruise ship	16	4	3	-	5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Been to Alaska	15	21	21	32	19
Average # of vacation trips (base: repeaters)	*	5.5	*	*	*
Previously traveled by cruise ship	3	3	4	-	6

*Sample size insufficient for analysis.

Trip Planning Timeline

- International travelers made the decision to take their Alaska trip an average of 9.5 months ahead of time, two months longer than the average Alaska visitor (7.7 months).
- Swiss visitors had the longest advance decision period at 11.2 months, followed by Australia/New Zealand (10.9), GSE (10.5), and Germany (10.3). The Japanese and Asian markets had the shortest timelines at 4.3 and 4.8 months, respectively.
- The average trip decision period changed very little between 2011 (9.7 months) and 2016 (9.5 months).
- International visitors booked an average of 6.6 months ahead of their trip, about one month longer than the average visitor (5.4 months).
- The average advance booking timeline was shortest among Asian and Japanese travelers at 3.1 and 3.6 months, respectively. The longest timeline was among Australia/New Zealand and UK travelers at 7.6 and 8.6 months.

TABLE 19.15 - Trip Planning Timeline
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Trip Decision					
Before July 2015	14	23	2	2	28
July-Sept 2015	17	15	4	-	14
Oct-Dec 2015	17	24	17	3	32
Jan-Mar 2016	23	19	21	54	18
Apr-Jun 2016	20	13	44	22	7
July-Sept 2016	8	6	12	20	1
Avg. # of months	**7.7**	**9.5**	**4.8**	**4.3**	**10.9**
Trip Booking					
Before July 2015	6	10	-	-	16
July-Sept 2015	11	12	2	6	16
Oct-Dec 2015	15	20	9	3	17
Jan-Mar 2016	27	29	23	44	36
Apr-Jun 2016	29	20	50	27	10
July-Sept 2016	13	9	18	21	4
Avg. # of months	**5.4**	**6.6**	**3.1**	**3.6**	**7.6**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Trip Decision					
Before July 2015	32	20	20	15	10
July-Sept 2015	25	24	28	15	16
Oct-Dec 2015	24	13	14	15	30
Jan-Mar 2016	11	28	21	41	22
Apr-Jun 2016	5	8	8	11	14
July-Sept 2016	3	7	9	3	8
Avg. # of months	**11.2**	**10.5**	**10.3**	**11.2**	**8.6**
Trip Booking					
Before July 2015	17	1	2	-	4
July-Sept 2015	23	13	11	17	5
Oct-Dec 2015	27	16	16	20	26
Jan-Mar 2016	16	33	33	34	28
Apr-Jun 2016	12	22	23	15	25
July-Sept 2016	4	14	15	13	12
Avg. # of months	**8.6**	**6.3**	**6.3**	**6.6**	**5.8**

Sources of Information

- Over half of international visitors (60 percent) used the internet to plan their Alaska trip, including 44 percent who booked online.
- Online usage rates were lower than the overall market for both planning (60 versus 68 percent) and booking (44 versus 58 percent).
- Internet usage rates ranged from 42 percent among UK visitors to 91 percent among Asian visitors.
- One-fifth of international visitors (22 percent) said they used travelalaska.com, slightly more than the overall market (18 percent). Usage rates ranged from 13 percent among Australia/New Zealand travelers to 41 and 39 percent of Other European and Japanese travelers, respectively.
- Over half of international visitors (54 percent) booked through a travel agent, much higher than the overall visitor rate of 35 percent. Travel agent usage rates ranged from 30 and 31 percent among Japanese and German travelers, respectively, to 71 percent among Australia/New Zealand travelers.
- Only 8 percent of international travelers said they had received the official State of Alaska vacation planner, lower than the overall visitor rate of 12 percent. German travelers were the most likely to have received it (14 percent); Japanese were the least likely (3 percent).
- Other than online sources and travel agents, international visitors were most likely to cite friends/family/co-workers (42 percent), brochures (25 percent), and cruise lines (22 percent) as sources of information.
- International travelers' usage of additional sources differed from the overall market in the following ways:
    - Less likely to cite friends/family/co-workers (42 versus 51 percent)
    - Less likely to cite prior experience (8 versus 23 percent)
    - More likely to cite brochures (25 versus 15 percent)
    - Less likely to cite AAA (2 versus 8 percent)
    - More likely to cite other travel guides/books (13 versus 6 percent)
    - More likely to cite tour company (9 versus 5 percent)
    - More likely to cite television (10 versus 4 percent)
- Usage rates for additional sources varied widely by market:
    - Usage of friends/family/co-workers ranged from 29 percent among Asian travelers to 51 percent among Australia/New Zealand travelers.
    - Brochure usage ranged from 13 percent among Japanese visitors to 35 percent among Australia/New Zealand visitors.
    - Cruise line usage ranged from 7 percent among German travelers to 29 percent among Asian travelers.

TABLE 19.16 – Sources of Information
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Internet, Travel Agent, Planner Usage					
Used internet	68	60	91	87	45
Booked over internet	58	44	67	73	30
Used travelalaska.com	18	22	36	39	13
Booked through travel agent	35	54	39	30	71
Received Official Planner	12	8	10	3	4
Other Sources – Top 10					
Friends/family/co-workers	51	42	29	36	51
Prior experience	23	8	4	8	6
Cruise line	22	22	29	26	24
Brochures	15	25	18	13	35
AAA	8	2	2	6	-
Other travel guide/book	6	13	12	15	8
Tour company	5	9	5	17	8
Magazine	5	6	7	7	2
Television	4	10	14	2	13
Milepost	4	5	1	3	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Internet, Travel Agent, Planner Usage					
Used internet	53	70	70	72	73
Booked over internet	42	60	62	48	60
Used travelalaska.com	19	29	25	27	41
Booked through travel agent	52	34	31	53	37
Received Official Planner	16	12	14	9	5
Other Sources – Top 10					
Friends/family/co-workers	28	36	32	36	33
Prior experience	8	12	10	29	12
Cruise line	19	9	7	11	9
Brochures	15	30	28	33	31
AAA	6	3	3	4	1
Other travel guide/book	14	32	34	21	19
Tour company	14	14	13	2	8
Magazine	4	13	12	17	13
Television	6	15	17	11	5
Milepost	5	18	14	30	10

Specific Websites/Apps

- International visitors' most common websites/apps for planning their Alaska trip were Google (41 percent), Trip Advisor (39 percent), airline websites (36 percent), and cruise line websites (34 percent). Their most common websites/apps for booking their trip were airline websites (37 percent), cruise line websites (22 percent), car/RV rental websites (12 percent), and tour company websites (10 percent).
- Compared to the overall market, international visitors were less likely to plan using airline websites (36 versus 50 percent) and more likely to plan using Google (41 versus 28 percent) and Trip Advisor (39 versus 23 percent). They were less likely to book using airline websites (37 versus 50 percent).

TABLE 19.17 - Top 10 Websites and Apps Used to Plan/Book International Visitors (%)

	All Visitors		International		Asia		Japan		Aust./NZ	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	36	37	40	48	16	11	33	23
Cruise line websites	35	27	34	22	16	21	30	34	56	29
Google	28	4	41	5	29	4	27	1	35	3
Trip Advisor	23	3	39	6	30	21	38	-	36	1
Expedia	14	10	16	8	9	7	4	5	21	8
Hotel/lodge/RV Park	11	10	10	6	6	5	17	3	13	5
Tour company websites	11	8	16	10	6	8	17	18	14	2
Car/RV rental websites	10	9	14	12	5	9	3	4	18	5
Travelocity	7	2	2	<1	2	-	1	-	2	1
Facebook	7	<1	8	<1	6	2	10	-	10	1
	UK		**GSE**		**Germany**		**Switzerland**		**Other Europe**	
	Plan	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**	**Plan**	**Book**
Airline websites	27	29	35	49	35	53	34	37	61	53
Cruise line websites	23	21	21	6	21	3	30	14	24	26
Google	54	7	42	5	38	4	41	8	53	9
Trip Advisor	53	7	29	1	22	1	28	5	48	7
Expedia	15	11	15	8	15	10	-	-	19	1
Hotel/lodge/RV Park	13	8	9	7	10	8	10	7	12	14
Tour company websites	33	19	16	14	14	12	15	11	20	17
Car/RV rental websites	8	8	26	25	23	23	35	29	24	26
Travelocity	2	-	<1	-	-	-	-	-	<1	<1
Facebook	7	-	4	-	4	-	4	-	11	-

Demographics

- International visitors reported an average party size of 2.3 people, similar to the overall visitor average of 2.4 people. Average group size was higher: 5.9 people, compared with 4.2 people.
- Average party size ranged from 2.0 among Japanese travelers to 2.7 among Asian travelers. Average group size ranged from 2.6 people among Swiss travelers to 6.6 people among Asian travelers.
- The average party size of 2.3 people is down slightly from the 2011 average of 2.5 people. Average group size declined from 6.5 people to 5.9 people.
- The male/female split among international travelers was about even at 48 percent/52 percent, similar to the overall market (49/51). The balance was fairly even throughout the individual markets. The 2011 balance was likewise even (49/51).
- International travelers reported an average age of 55.3 years, two years older than the overall market (53.7 years). Average age ranged from 44.6 among Swiss travelers to 62.3 among Australia/New Zealand visitors. The average age increased by nearly five years from 2011 (from 50.7 to 55.3 years).
- One out of five international travelers (20 percent) reported children in their household, slightly lower than the overall market (23 percent). Forty-one percent were retired/semi-retired, compared with 44 percent of the overall market.
- The rate of international travelers with children in their household fell slightly between 2011 and 2016, from 25 to 20 percent, while the retirement rate stayed the same at 41 percent both years.
- Seven out of ten international visitors (71 percent) were college graduates, higher than the overall visitor rate of 63 percent. The college graduate rate was highest among Asians at 87 percent, and lowest among Swiss travelers at 62 percent. The college graduate rate increased from 59 percent in 2011 to 71 percent in 2016.
- International travelers reported an annual average income of $89,000, less than the overall visitor average of $114,000. (Incomes reported in non-U.S. currencies were adjusted to U.S. dollars.) Average incomes ranged from $77,000 among Asian visitors to $128,000 among Swiss visitors.
- Average income among international travelers fell from $107,000 in 2011 to $89,000 in 2016.

See table, next page

TABLE 19.18 - Demographics
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Average party size	2.4	2.3	2.7	2.0	2.1
Average group size	4.2	5.9	6.6	5.4	8.6
Male/female	49/51	48/52	48/52	51/49	48/52
Average age	53.7	55.3	50.6	55.9	62.3
Children in household	23	20	39	19	12
Retired/semi-retired	44	41	20	39	52
College graduate	63	71	87	72	63
Average income	$114,000	$89,000	$77,000	$82,000	$78,000
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average party size	2.1	2.2	2.1	2.3	2.1
Average group size	5.2	2.9	3.0	2.6	3.0
Male/female	47/53	52/48	54/46	52/48	52/48
Average age	58.6	45.6	47.1	44.6	49.7
Children in household	9	15	10	26	25
Retired/semi-retired	66	18	20	21	28
College graduate	65	78	79	62	77
Average income	$102,000	$117,000	$110,000	$128,000	$97,000

Spending

- International visitors reported spending an average of $1,322 per person on their Alaska trip, excluding transportation to enter/exit the state, $300 more than the average Alaska visitor. Average spending ranged from $1,064 among Australian/New Zealand travelers to $1,827 among Other European travelers. Sample sizes for the Japanese and Swiss markets were too small for analysis.
- Average spending among international visitors increased from $1,013 in 2011 to $1,322 in 2016. Total spending increased from $156 million to $221 million.

TABLE 19.19 – Average Per-Person and Total Spending in Alaska Excluding Transportation to Enter/Exit Alaska International Visitors

	All Visitors	International	Asia	Japan	Aust./NZ
Average per-person	$1,057	$1,322	$1,442	*	$1,064
Total spending (millions)	$1,974.5	$220.8	$33.2	*	$64.9
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average per-person	$1,422	$1,768	$1,677	*	$1,827
Total spending (millions)	$39.8	$35.4	$25.2	*	$21.9

* Sample size insufficient for analysis.

AVSP 7 – Summer 2016

Section 20: Methodology

McDowell GROUP

Total Traffic

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

TABLE 20.1 - AVSP Visitor Exit Points and Data Sources

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

Because all commercial airlines besides Alaska Airlines only fly directly out-of-state, enplanement data from Anchorage and Fairbanks airports (via DOTPF) was used to determine exiting passengers aboard non-Alaska Airlines flights. Alaska Airlines, which operates flights within Alaska as well as out-of-state, provided an exact count of outbound passengers for each exit point. Outbound passengers aboard Delta flights departing from Juneau and Ketchikan were collected from Juneau and Ketchikan Airports. Delta passengers departing from Sitka were collected from Delta Airlines.

Between 2006 and 2014, highway visitor traffic was based on border crossing data from the Yukon government, to reflect traffic exiting Alaska and entering Canada. For the summer 2015 visitor volume estimate, a combination of U.S. and Canada border data was used, due to inconsistencies between the two data sets, and a change in how Canadian traffic data was recorded. For summer 2016, U.S. traffic was used for three highways (Haines, Alcan, Top of the World). Two factors led to this decision:

- The Yukon Department of Government and Culture is changing their data source and method of reporting from Canada Border Services to Statistics Canada. Data will not be available at the same level of detail as it has in the past, and may be more delayed.
- Historical data shows that a similar level of traffic enters as exits a particular highway border over the season for these three locations.

Yukon data for the Klondike Highway was used instead of U.S. data for two reasons.

- Yukon data breaks out the number of passengers on motorcoaches on same-day visits (i.e. Skagway cruise passengers on day tours to the Yukon), while U.S. data reports all motorcoach passengers combined.
- The Skagway U.S. border captures a number of travelers who are on short trips up to the pass – they do not cross into Canada, but they pass the U.S. border station on their way back to Skagway.

Visitor/Resident Ratios

To estimate total visitor traffic, visitor/resident ratios were applied to the total traffic data. A visitor/resident ratio is the proportion of out-of-state visitors to Alaska residents for each exit mode. For most exit points, these ratios were collected in the form of "tallies" at the same time surveys were conducted. McDowell Group tallied a total of 57,441 people as they were exiting Alaska. The following table shows the number of people tallied for each exit mode.

TABLE 20.2 - Visitor/Resident Tally Contacts, by Mode

Exit Mode	Passengers Tallied
Air	53,394
Highway	4,047
Ferry[1]	0
Cruise ship[2]	0
Total	**57,441**

[1] The Alaska Marine Highway System stopped requiring passenger zip codes in 2016. Exact visitor/resident ratios by month and disembarkation port from 2015 were applied to 2016 traffic to estimate visitor volume.
[2] As in previous AVSP studies, 100 percent of cruise passengers were assumed to be out-of-state visitors.

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

Domestic and International Air

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

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

Highway

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

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

There were two highway modes that, as in previous AVSPs, were not sampled: motorcoaches and commercial vehicles. This is due to the difficulty in intercepting these types of vehicles on the highway. Visitor/resident ratios for these modes were based on interviews in 2006, and were repeated for 2011 and 2016. Because visitor traffic among these two highway modes is so small, representing 0.2 percent of all visitors, they are combined with other highway traffic for purposes of the visitor volume estimate.

Cruise Ship

No tallies were conducted for cruise passengers. As in previous AVSP studies, all cruise passengers were assumed to be out-of-state visitors. Although a small number of Alaskans are known to cruise, they are an extremely small, statistically insignificant fraction of this market segment.

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[1] The one exception to this collection method occurred in Sitka, where the infrequency of flights and small size of the boarding area allowed both surveys and tallies to be conducted outside of the secure area. Tallies were conducted as passengers waited in line to go through security.

[2] Because passengers flying directly out of state from "other" destinations (Petersburg, Wrangell, Yakutat, and Cordova) were not sampled in the survey, tallies were not conducted for these exit points. The visitor/resident ratio for these passengers was based on an average of Juneau, Ketchikan, and Sitka ratios.

Ferry

Until 2016, the Alaska Marine Highway System required passengers to provide their home zip code, allowing for an exact count of all non-Alaska residents disembarking at Bellingham and Prince Rupert. AMHS discontinued this practice in 2016. As a proxy, visitor/resident ratios from 2015 were applied to 2016 passenger traffic by month and by disembarkation port to arrive at visitor exits by ferry.

Survey Population

The AVSP Summer 2016 survey was conducted with out-of-state visitors who were exiting Alaska between May 1 and September 30, 2016. Seasonal residents, such as seafood processing workers, and other non-resident shift workers, were screened out of the survey. The following table shows how respondents were selected, by exit mode.

TABLE 20.3 - AVSP Target Survey Population, by Mode

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

Survey Design

AVSP 7 utilized an intercept survey instrument. The McDowell Group study team designed the survey with input from the DCCED and ATIA. The vast majority of survey questions were based on those used in AVSP 6. A few questions were modified for purposes of clarity, and several new questions were added.

Survey Staff

The AVSP Summer 2016 survey staff included 65 surveyors based in the following locations: Anchorage, Fairbanks, Juneau, Ketchikan, Sitka, Tok, Haines, and Skagway. Many of the surveyors had previously worked on AVSP and other McDowell Group visitor surveys. Surveyors underwent extensive training in proper data collection procedures. Consistent training and monitoring assured that all surveys were administered in the same way to minimize bias. Japanese and Korean interpreters were employed for flights bound for those countries. All surveyors wore name badges and uniforms. Highway surveyors also wore reflective safety vests.

Survey Locations

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

TABLE 20.4 - AVSP Survey Locations

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

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

Sample Sizes

The AVSP Summer 2016 survey program included 5,147 intercept surveys (in-person interviews) and 779 surveys completed online, for a total of 5,926 surveys. The following table shows the number of completed surveys, by exit mode.

TABLE 20.6 - Sample Sizes, by Exit Mode

Exit Mode	Intercept	Online	Total
Domestic Air	3,235	630	3,865
International Air	257	149	406
Highway[1]	366	0	366
Cruise Ship	1,037	0	1,037
Ferry	252	0	252
Total	**5,147**	**779**	**5,926**

Sampling Procedure

The sampling process starts with creating a target number of intercept surveys, by month, for each mode and exit point. These targets were largely based on estimated traffic volume. The sample targets were adjusted to ensure appropriate sample sizes. For example, visitors exiting by ferry represent only 0.4 percent of all visitors. If they were represented proportionally in the sample, the sample target would be too small for analysis (24 out of 6,000 surveys). The sample target was increased; the final ferry survey count was 252. Similarly, the international air sample was adjusted upwards. These visitors represent 0.9 percent of total exiting visitors, which would result in 54 surveys. The final international air survey count was 406.

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

Following are more specific sampling procedures for each exit mode.

Domestic and International Air

The air samples were created using flight schedules for all airlines carrying passengers out of the state. For each sample day, flights were selected based on a randomly selected starting flight. For each flight that was selected, surveyors had a target number of surveys to complete among boarding passengers. Surveyors would approach randomly selected passengers in the boarding area and complete the required number of surveys. All surveyors were allowed in the secure area of the airport, with two exceptions: in Sitka, the infrequency of flights and small size of the boarding area allowed both surveys and tallies to be conducted outside of the secure area. In Anchorage, surveyors were not allowed into the international boarding area for security reasons; surveys with passengers departing on international flights were conducted in the check-in area instead.

Highway

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

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

Cruise Ship

The cruise ship sample was selected based on the expected volume of passengers at each "last port of call" in Alaska, before the ships sailed to Vancouver, Seattle, or other non-Alaska ports. Cruise Line Agencies of Alaska provided the 2016 cruise ship schedule, including each ship's route and capacity. Although Ketchikan represented the bulk of exiting passengers, Skagway was also a last port-of-call for many passengers. The appropriate number of surveys was conducted in each location to reflect actual exiting volume. Survey targets also reflected passenger volume by cruise line – for example, if 30 percent of all exiting cruise passengers were expected to be sailing with Princess Cruises, 30 percent of the targeted ships were Princess ships.

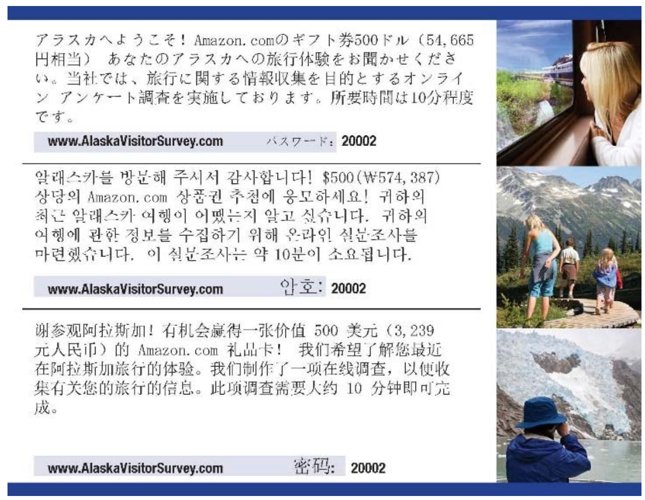
Surveyors would station themselves near the targeted ship for several hours prior to the ship's scheduled departure. During this period, surveyors approached randomly selected passengers to complete surveys before they boarded their ship. Where necessary, surveyors were given special permission by private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

Ferry

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

Online Component

The AVSP 7 survey methodology included an online sample in addition to the intercept sample. The online sample was collected by distributing "invitation cards" to visitors during intercept sample periods at the Anchorage International Airport (see image, below). The color-printed postcard contained a message from Alaska's Governor inviting visitors to share information about their trip over the internet. Recipients were directed to a web address, and each postcard had a unique password. Respondents would then go online and self-administer the survey. The back of the card contained translations of the front side in three languages: Japanese, Korean, and Chinese. The links would take respondents to translated versions of the survey. Countries were selected for language translation by DCCED.



For every sample day, surveyors distributed a target number of invitation cards. The card distribution target was based on response rates from AVSP 6. Cards were distributed to visitors departing during the same sample period as intercept respondents.

The online survey was designed to mirror the intercept survey to the greatest extent possible. Questions were asked in the same order, with nearly identical wording to the intercept survey. More explicit directions were necessary for some questions to minimize confusion. If respondents had questions or difficulties filling out the survey, there was a link on the bottom of each screen to contact the Help Desk. All spending questions were excluded from the online survey, based on AVSP 5 and 6, which showed that spending data collected online did not have the necessary level of accuracy.

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

Several changes were made to the AVSP 7 online methodology, from previous AVSPs. The biggest factor in this decision was a considerable decline in online response rates between AVSP 5 and 6. A lower response rate had two implications: it cost more to get each completed survey, and the sample was more self-selected (and therefore less representative) of the overall market. Another factor in online surveys is accuracy: intercept surveys are inherently more accurate, because surveyors are able to clarify questions and correctly interpret responses.

Because of these factors, the study team made a strategic decision to focus much more on the intercept sample for AVSP 7. The online survey was retained, but only in the Anchorage Airport, where distribution of postcards was worth the investment due to the large number of visitors present.

Before online data was combined with intercept data, survey responses were compared between the two data sets (Anchorage Airport exiters). Data was consistent between the two methods for nearly all survey questions, with a couple of exceptions. Activity participation reported online differed from participation reported by intercept respondents due to the greater ability of surveyors to clarify and help categorize responses appropriately. All activity participation data in this report is therefore based to intercept respondents only. One other topic where responses differed was in online usage and online booking components. Because online survey respondents are naturally biased towards internet users, these rates were higher among online respondents. For these questions, survey results are based to intercept respondents only.

Response Rates

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

In intercept surveys, the response rate is the number of total surveys, divided by the number of qualified, targeted respondents approached by surveyors. For example, for the Domestic Air mode, there were 3,640 qualified respondents – that is, out-of-state residents who were exiting Alaska. Of this number, 3,214 agreed to be interviewed. The response rate for Domestic Air is 3,640 divided by 3,214, or 88 percent.

For the online survey, the response rate is the number of people who completed the online survey, out of the total number of people who received invitation cards. (Only out-of-state visitors exiting Alaska were given cards.) For example, there were 9,417 cards distributed to visitors exiting the state via the Anchorage Airport. Of these visitors, 779 completed the online survey. The response rate for online respondents is 9,417 divided by 779, or 8.3 percent.

TABLE 20.7 - Response Rates, by Mode

Exit Mode	Intercept	Online
Air	88.2%	8.3%
Highway	66.6%	n/a
Cruise ship	64.0%	n/a
Ferry	84.8%	n/a
Total	**80.1%**	**8.3%**

The overall response rate for the intercept sample was 80.1 percent. As in 2006 and 2011, rates differ by mode. Air and ferry respondents generally show the highest intercept response rates because they often have plenty of time (and little to do) while they are waiting for their flight or vessel to depart. Cruise passengers show slightly lower response rates – they are approached as they return to their ship, occasionally in inclement weather, and can be anxious to embark. Likewise, highway respondents are required to make a special stop for the survey.

The overall intercept response rate fell slightly between AVSP 6 and AVSP 7, from 85.1 percent to 80.1 percent. The response rate among online respondents fell slightly as well, from 10.2 percent to 8.3 percent. While the response rates have declined in recent generations of AVSP, intercept survey response rates remain significantly higher than response rates for mail, telephone, and online-only surveys.

Online Incentive

Incentives are commonly used in surveys to maximize response rates. For AVSP 7, online respondents were entered into a drawing to win one of five $100 Amazon.com gift certificates, and one $500 certificate.

Margins of Error

The following table shows the maximum margin of error for the intercept and combined samples. The maximum margin is ±1.3 percent at the 95 percent confidence level for the overall sample and ±1.4 percent for the intercept sample. The combined sample is used for all data in this report, with the exception of spending data. Sample sizes and margins of error for specific subgroups are presented in the introduction to each section and/or chapter where those subgroups are profiled.

TABLE 20.8 - Visitor Survey Margin of Error

Survey Method	Sample Size	Maximum Margin of Error
Intercept	5,147	±1.4%
Online	779	n/a
Total	**5,926**	**±1.3%**

Note: All data in this report is based to the total (combined) sample, with the exception of spending data, which is based to intercept results only.

While the margin factors in the table above (and those offered throughout this report) give general guidelines for the margin of error, most data in this report are more accurate than the maximum margins suggest. The margin is based not only on the number of respondents in the base of each question, but also on the percentage itself. (For example, a total of 1,948 respondents were cruise visitors, and 25 percent were from the Southern US.) The expression "maximum margin of error" applies only if the attribute being sampled is distributed 50-50 among the population, such as gender. For gender, the maximum margin of error for the total sample is ±1.3 percent.

However, the potential for error decreases as the survey result moves toward either end of the bell curve. If a survey response is around 80 percent for the total sample of 5,926, the margin of error decreases to ±1.0 percent. This margin would apply, for example, to the survey result for trip purpose – 79 percent of all visitors said they were traveling for vacation/pleasure. That same margin would apply to responses around 20 percent. At the 90 and 10 percent level, the margin of error for the total sample decreases even further, to ±0.8 percent.

Data Weighting

Survey data is often "weighted" to properly reflect known characteristics of a population. The primary weighting in AVSP is by exit mode. For example, AVSP 7 included 252 surveys of visitors who exited the state by ferry, or 4.3 percent of all surveys. However, this market represents only 0.4 percent of all visitors. For these visitors to be properly represented in the overall visitor market, their surveys are "weighted down." Similarly, visitors exiting by cruise ship represented 17.5 percent of all surveys, but 46.1 percent of all exiting visitors. Their data is "weighted up." All AVSP data was weighted by exit mode and location to reflect actual traffic volumes. Cruise and ferry data were also weighted by month. Cruise passengers who exited by cruise ship were weighted by one additional factor, cross-gulf versus round-trip, to reflect CLAA data.