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ALASKA VISITOR

**AVSP**

STATISTICS PROGRAM II

***Patterns, Opinions, and  
Planning  
Summer 1989***

**Department of Commerce & Economic Development  
Alaska Division of Tourism  
State of Alaska**

**Prepared By:**



**Juneau-Ketchikan**

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# Introduction and Reader Notes



# Introduction

In 1985 the State of Alaska Division of Tourism inaugurated perhaps the most sophisticated visitor industry research program among the 50 states. Tourism was, and is, an industry of growing economic importance to the state. Once regarded as a stepchild of the major traditional resource industries, tourism's obvious growth in the 1980s gave it legitimacy as a major industry. At the time, it had become critical to gain detailed knowledge of the Alaska visitor market so that the State and industry could channel their marketing and development efforts in the most productive fashion. Until this new program – termed the *Alaska Visitor Statistics Program (AVSP)* – the state and industry had been operating on older data from two past research projects in 1982 and 1976.

Selecting The McDowell Group as the program contractor, the Division of Tourism proceeded with sampling arriving visitors by personal intercept interview, an expenditure diary survey, and a follow-up mail survey which collected information from visitors after they had completed their Alaska trip.

The result of this first AVSP was a series of six comprehensive reports analyzing Alaska visitor volume, expenditures and characteristics. An additional result was the development, by The McDowell Group, of a methodology which yielded what are thought to be national records in response rates for personal intercept (98%), diary (69%) and comprehensive mail (82%) survey methods. By comparison, the State of Hawaii's expenditure diary was returned by 20% of the visitors receiving it. Further, the AVSP program and its unique methodology gained recognition in the field when the firm was invited to present the program to the 1986 annual conference of the international body, The Travel and Tourism Research Association (TTRA).

The AVSP was concluded in September of 1986 after 16 months of continuous visitor surveying. Following this, limited secondary research by The McDowell Group tracked arrivals and estimated visitor volume in the absence of survey data.

By 1988, the State and visitor industry had begun to experience clear changes in the Alaska visitor market and in the effectiveness of major marketing programs. A slowing in market growth and falling responses to some traditional marketing methods were of obvious concern. This was occurring at a time when most of the State's economy was suffering a major recession caused by falling oil revenues and cutbacks in State capital and operating expenditures. New, fresh looks at the potential of other industries were in order. In response, the Division of Tourism and the Alaska visitor industry decided to revive the AVSP methodology and survey visitors for a full year beginning in Summer 1989. The McDowell Group was again selected as contractor, having recently completed a similar project for the Southeast region of the State.

This report, *Patterns, Opinions, and Planning – Summer, 1989*, is the third in a series of six reports generated from the survey research work in what is termed the *Alaska Visitor Statistics Program II*.

The program has four distinct phases, which are interdependent. These are the Arrival Count, Random Arrival Survey, Visitor Expenditure Survey and Visitor Opinion Survey. The following exhibit and map show the survey locations and program phases.

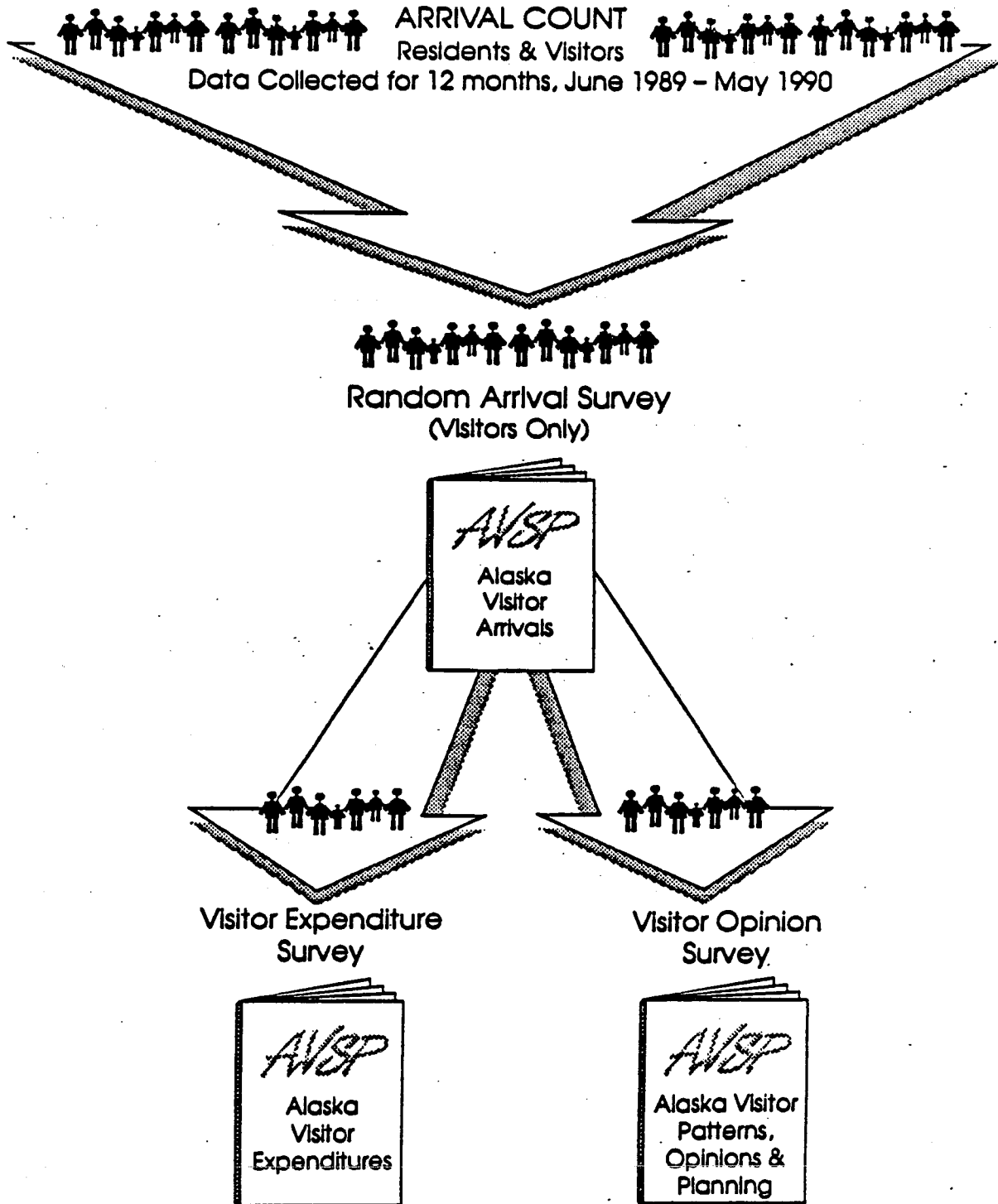
### Alaska Visitor Statistics Program II Phases

Phase	Description	Purpose
1. Arrival Count (AC)	Secondary research collection of data on all passengers arriving in Alaska at their first points of entry.	To quantify the number visitors and residents entering the state by each mode, using ratios found in the RAS phase, below.
2. Random Arrival Survey (RAS)	Personal intercept interviews with a scientific sample of visitors at their first point of entry.	To determine composition of visitors including their trip purpose, modes of entry/exit, origin, age, party size, gender, and travel type. To measure resident/visitor ratios for each entry mode for expansion to Arrival Count data. To collect names and addresses for VOS mail out survey. To administer VES diary to arriving visitors.
3. Visitor Expenditure Survey (VES)	28 - day expenditure diary booklet distributed on arrival to every other RAS respondent.	To provide visitor expenditure data by detailed category and by region and community.
4. Visitor Opinion Survey (VOS)	16-page survey booklet with personalized cover letter from DOT Director mailed to every other RAS respondent (the half not getting a diary) after their return home.	To assess visitor use of, and satisfaction with, statewide and regional facilities, accommodations, attractions, transport modes and activities. To determine visitors volume by community, region and attraction. To collect trip characteristics data. To collect data on the Alaska trip planning process, travel habits and demographics.

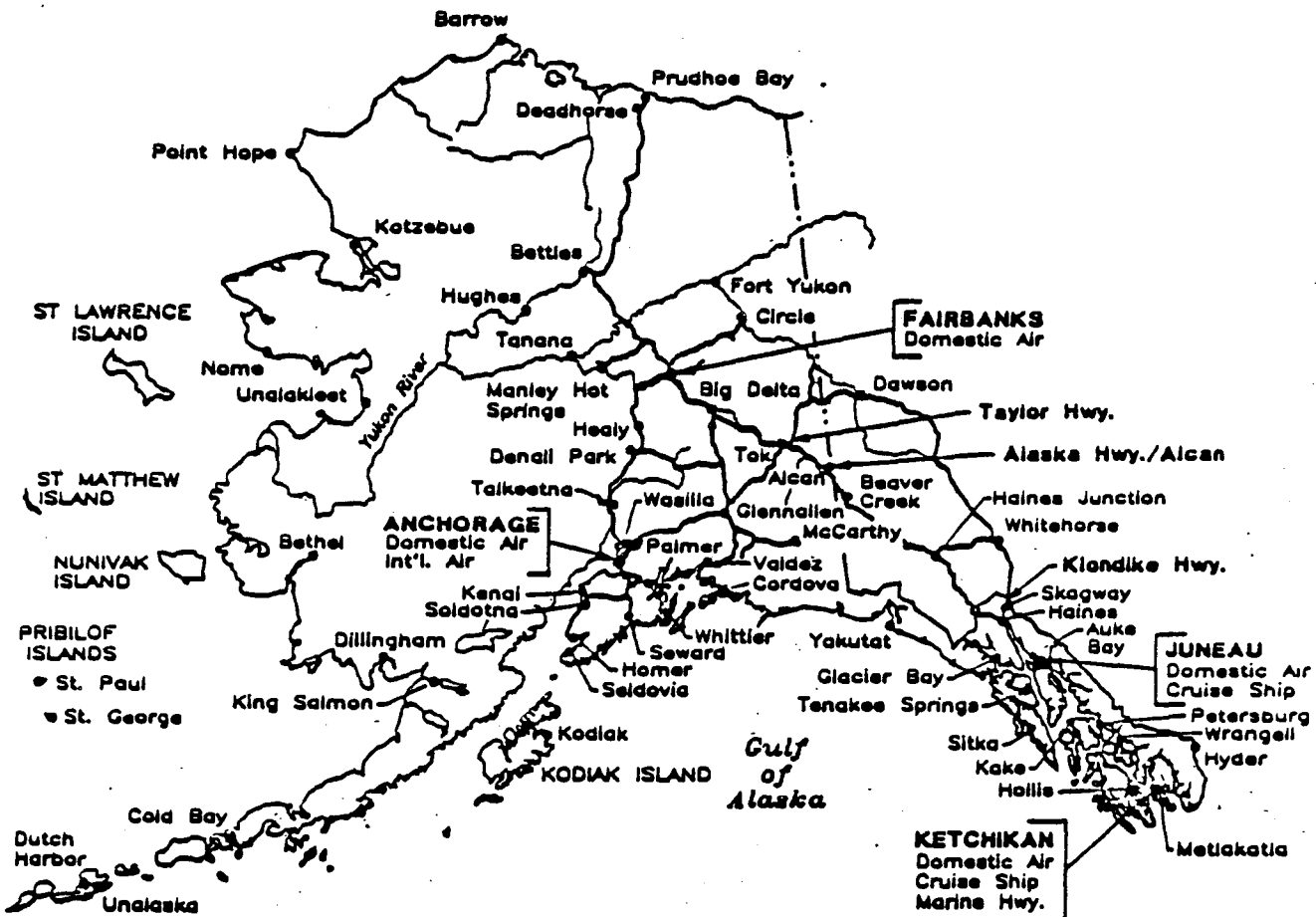
The six major reports to be generated as part of the program are:

Report	Date
1. Alaska Visitor Arrivals, Summer 1989	March, 1990
2. Alaska Visitor Expenditures, Summer 1989	June, 1990
3. Alaska Visitor Patterns, Opinions, and Planning, Summer 1989	August, 1990
4. Alaska Visitor Arrivals, Fall/Winter/Spring, 1989-90	October, 1990
5. Alaska Visitor Expenditures, F/W/S 1989-90	November, 1990
6. Alaska Visitor Patterns, Opinions, and Planning, F/W/S 1989-90	December, 1990

# Alaska Visitor Statistics Program II Phases



# Random Arrival Survey Locations



## ENTRY TRANSPORTATION MODE

### SURVEY LOCATION

Domestic Air    Cruise Ship    Highway    Marine Highway    International Air

ANCHORAGE  
FAIRBANKS  
JUNEAU  
KETCHIKAN  
Alaska Hwy.  
Klondike Hwy.  
Taylor Hwy.

ANCHORAGE	X				X
FAIRBANKS	X				
JUNEAU	X	X			
KETCHIKAN	X	X		X	
Alaska Hwy.			Auto		
Klondike Hwy.			Auto		
Taylor Hwy.			Auto		

NOTE: Marine Highway is sampled onboard vessels from Prince Rupert and Seattle underway to Ketchikan. Alaska Highway is sampled at U.S. Customs Service station at Alcan. Taylor Highway is sampled at intersection of Taylor and Alaska Highway near Tok. Klondike Highway is sampled at the U.S. Customs Service station at Skagway.

# Reader Notes - VOS Summer 1989

## Sample Size Considerations

The Summer 1989 Visitor Opinion Survey sample includes 1,134 visitor parties and has a maximum margin of error of  $\pm 3.0\%$ . The response rate is 73%, down slightly from the 1985 survey response rate but still exceptional for mail surveys. The average VOS survey represents 200 traveling parties comprised of 460 individual visitors.

The AVSP program is designed to yield a great deal of data which is accurate on a statewide basis. Because of the large sample and the strict sample quality control, the project also yields much sound data at the regional and community levels. However, as explained below, there are limitations to the accuracy of small group characteristics.

Survey results with more than 14,000 visitors (represented by a subsample of about 30 or more VOS surveys) are considered quite accurate. Detailed characteristics of groups smaller than this are subject to statistical laws of small sample size and may not always be accurate. Some small subsamples may be quite accurate depending on the dispersion or concentration of the data, so a sample size rule does not apply uniformly.

However, readers should view with some caution subsample details from groups numbering less than 14,000 or less than 3% of total visitors. For example, the number of visitors to Nome is quite accurate, though it is a small number. Further details, such as the number of Nome visitors from Florida, are beyond the statistical parameters of this study designed for accurate statewide results.

## New Definition of Package Tour types

New trends in the package tour market require revision of package tour type definitions. In the 1985 VOS, package tours were largely of two types - Round Trip Cruises and Cruise Tours. But innovation in packaging, plus the growth of packages (such as sport fishing) which do not utilize cruiseships, brought about new definitions:

Round Trip Cruise means spending all nights on board ship while enjoying day visits at Alaskan ports of call, then returning to the port of origin (usually Vancouver, B.C.) to end the cruise.

Cruise/Tour means combining cruising with a comprehensive land-based tour of Alaska. Cruising into Alaska aboard ship, touring mainland Alaska, then departing by air (or the reverse) is the common pattern.



Air/Cruise, the fastest growing product, involves cruising into Alaska, spending one or no nights on land in Alaska following the cruise, and leaving the state by air (or the reverse). Incremental capacity limitations (especially railroad dome cars) prevent growth in some types of Cruise/Tour packages and some of this demand is shifted over to Air/Cruise packages. The economy of certain Air/Cruise packages, relative to other cruise offerings, also stimulates sales.

Air/Lodging, a small share of the package market, involves flying both to and from the state with land-based lodging included while touring Alaska.

## Organization of the Study

This study emphasizes the Vacation/Pleasure visitor market which accounts for two-thirds of all summer visitors. The Vacation/Pleasure visitor market is the market most impacted by marketing programs of all kinds. Chapter IV details statewide characteristics of the Vacation/Pleasure visitor market while Chapter V identifies the Vacation/Pleasure visitor market for each of Alaska's five major visitor regions.

Chapter VI provides detailed statistical profiles for three major types of analysis - Trip Purpose, Mode Use (meaning mode markets) and Origin. The Trip Purpose analysis provides detailed data for the smaller markets of Business Only visitors, those who combine Business and Pleasure, and those whose primary purpose is to Visit Friends and Relatives on their Alaska trip. Mode Use is a new type of analysis especially useful for transportation-related businesses.

Mode Use defines markets by considering all visitors who use a particular transportation mode for entering and/or exiting Alaska. This form of analysis is superior to Entry Mode analysis because it includes all visitors using each mode, not only those entering by each mode. For example, only 27% of the market entered the state by Cruiseship. However, 36% of the market actually used a Cruiseship as a major part of their Alaska trip. Likewise, just 5% of the market entered by Ferry but 8% used the system for a major portion of their travel.

Origin analysis in this report goes beyond the standard four U.S. regions plus Canada and Overseas. Detailed profiles are also included for the two biggest producing states (California and Washington) and for the two most important Overseas markets - Germany/Switzerland/Austria, and Japan.

# **Chapter I. Summary of Major Findings and Marketing Implications**

- A. Visitor Opinions**
- B. Visitor Travel Patterns**
- C. Visitor Trip Planning**
- D. Demographics**



# Chapter I. Summary of Major Findings and Marketing Implications

## A. Visitor Opinions

### 1. Overall Alaska Trip Ratings

- Visitors were extremely pleased with their overall Alaska trip experience, rating it 6.3 on the 1 to 7 scale, slightly higher than in 1985. Half of all visitors gave their Alaska trip the highest rating, a 7 (excellent). Vacation/Pleasure visitors also rated their overall Alaska trip an average 6.3.
- Alaska is rated a somewhat better than average value for the money compared to other destinations, with an average rating of 5.5 on the 1 to 7 scale. Vacation/Pleasure visitors also rated value for the money at 5.5. These ratings have stayed the same since 1985.
- The Alaska experience exceeded most visitors' expectations with the average rating for all visitors and Vacation/Pleasure visitors of 5.9, slightly better than 1985.

	Average Alaska Trip Ratings ("1" poor and "7" Excellent Scale)	
	All Visitors	Vacation/Pleasure Visitors
Overall Alaska Trip Rating	6.3	6.3
Value for Money	5.5	5.5
Compared to Expectations	5.9	5.9

### 2. Value for the Money Ratings

- Of the nine aspects of the overall Alaska trip, the friendliness/helpfulness of the Alaska people and sightseeing/attractions were rated as the best values, (6.2 and 6.0 on the 1 to 7 scale, respectively). Vacation/Pleasure visitors rated friendliness/helpfulness slightly higher at 6.3.
- Lowest rated aspects were accommodations (5.2) and restaurants (5.2). Vacation/Pleasure visitors rated accommodations slightly higher at 5.3.

- Activities rated 5.7 and transportation overall, to, from and within Alaska are all rated 5.5, by all visitors. Vacation/Pleasure visitors rated activities 5.6, and all transportation categories except transportation from Alaska 5.6.

	Value for Money Ratings	
	All Visitors	Vacation/Pleasure Visitors
Friendliness/Helpfulness	6.2	6.3
Sightseeing/Attractions	6.0	6.0
Activities	5.7	5.6
Transportation Overall	5.5	5.6
Transportation to AK	5.5	5.6
Transportation from AK	5.5	5.5
Transportation within AK	5.5	5.6
Accommodations	5.2	5.3
Restaurants	5.2	5.2

### 3. Likelihood of Recommending and Visiting Alaska Again

- Nearly four out of ten visitors and three in ten Vacation/Pleasure visitors indicated they would be very likely to visit Alaska again for Pleasure. Fewer were likely to visit Alaska again for business.
- All visitors are very likely to recommend Alaska as a place to vacation. In fact, 94% of all visitors and 96% of Vacation/Pleasure visitors, after returning from the state, had already recommended Alaska to someone.

	Likelihood of Recommending Alaska and of Visiting Alaska Again	
	% indicating 'Very Likely'	
	All Visitors	Vacation/Pleasure Visitors
Repeat for Pleasure	39%	30%
Repeat for Business	21	4
Recommend Alaska	70	71

### 4. Biggest Misconceptions About Alaska

- The biggest misconception cleared up by a visit to Alaska was the weather. Approximately one-third of all visitors and Vacation/Pleasure visitors said the weather was better than expected.
- Only a small portion of all visitors and all Vacation/Pleasure visitors indicated Alaska was worse than expected. Of concern among this group were the attractions/appeal of Alaska, prices/cost, roads and facilities.

	Biggest Misconception Cleared Up By Visit to Alaska	
	All Visitors	Vacation/Pleasure Visitors
Better than Expected	47%	50%
Weather Better than Expected	32	34
Different than Expected	14	16
Worse than Expected	8	7

## B. Visitor Travel Patterns

### 1. Entry and Exit Modes

- The primary entry mode for all visitors to Alaska is Domestic Air followed by Cruiseship. However, the primary entry mode for Vacation/Pleasure visitors only is Cruiseship followed by Domestic Air.
- Exit mode patterns closely resemble entry mode patterns for all visitors. For Vacation/Pleasure visitors Domestic Air becomes the primary exit mode followed by Cruiseship Mode.

Mode	Entering Visitors	Percent	Entering VP Visitors	Percent
Domestic Air	270,400	52%	131,000	36%
Cruiseship	142,100	27	137,500	38
Highway/Personal Vehicle	68,100	13	57,200	16
Ferry	24,400	5	22,100	6
International Air	15,600	3	12,400	3
Non-response	500	-	100	-
Total	521,000	100%	360,300	100%

Mode	Exiting Visitors	Percent	Exiting VP Visitors	Percent
Domestic Air	271,900	52%	139,800	39%
Cruiseship	134,500	26	127,000	35
Highway/Personal Vehicle	64,000	12	53,800	15
Ferry	27,200	5	25,000	7
International Air	19,000	4	12,700	4
Non-response	4,200	1	1,800	<1
Other	200	--	200	--
Total	521,000	100%	360,300	100%

## 2. Mode Market Size

- More visitors and more Vacation/Pleasure visitors used Domestic Air for entry, exit or both than any other transportation mode. The second most used mode by both all visitors and Vacation/Pleasure visitors is Cruiseship. The Highway is third with 16% of the all visitors and 20% of Vacation/Pleasure visitors using this mode. Though Ferry and International Air modes carry fewer visitors than other modes, they are nevertheless important to the total transportation picture.

Mode	Mode Market Size (Excludes Seasonal Workers)	
	All Visitors	Vacation/Pleasure
Domestic Air	329,900	186,500
Cruiseship	187,500	178,700
Highway-Personal Vehicle	82,500	70,700
Ferry	43,100	39,600
International Air	22,500	15,400

## 3. Visitor Travel Type

- The majority of Alaska visitors (58%) are traveling as Independents, not on a prearranged package tour. Over one-third of these Independents purchase sightseeing while in the state and are known as Inde-Package visitors.
- The majority of Vacation/Pleasure visitors (56%) are traveling on a prearranged package tour. Among the 44% who are Independents, nearly half are Inde-Package visitors who purchase sightseeing while in the state.

Visitor Travel Type	All Visitors	Vacation/Pleasure
Independent	58%	44%
Independent	37	24
Inde-Package	21	20
Package	42	56

## 4. Length of Stay

- The average length of stay for all visitors is 10.9 nights. The most common lengths of stay are 3-6 nights (37%) and 7-13 nights (37%). One in ten stay 14-20 nights and one in ten stay more than 20 nights.
- The average length of stay for Vacation/Pleasure visitors is a day and a half less than the all visitor average, 9.2 nights. Most VPs stay either 3-6 nights (40%) or 7-13 nights (42%).

- The visitors who stay longest are those who come to visit friends and relatives, Ferry users, Inde-Package visitors, Europeans, International Air users in general, the Highway market and Midwesterners. Length of stay for these groups ranges from 13 to 17 nights. Shortest stays are by round-trip cruisers, Canadians and Air/Cruise visitors. These groups stay for five to seven nights.

## 5. Lodging Type

- The lodging types most often used by all visitors are (in order) hotel/motels, followed by cruiseships, private homes, resort/lodges and RV/campgrounds. Ferries are used by a small percentage, as are bed & breakfasts, a small but growing lodging segment. Visitors stay longer in private homes and RV/campgrounds than in any other lodging type.

- Among Vacation/Pleasure visitors, cruiseships are used most often, followed by hotel/motels, resort/lodges, RV/campgrounds and private homes. Ferries and bed and breakfast establishments are also used for lodging by a small percentage of visitors. VP visitors stay longer in RV/campgrounds than in any other lodging type.

Lodging Type	All Visitors % Using	Avg # of Nights*	Vacation/Pleasure % Using	Avg. # of Nights*
Hotel/Motel	48%	4.1	46%	4.1
Cruiseship	37	5.1	50	5.1
Private Home	27	12.4	14	9.1
RV/Campground	20	10.2	20	11.8
Resort/Lodge	20	2.9	23	2.8
Ferry	9	2.4	12	2.4
Bed & Breakfast	8	3.4	7	2.9
Other	6	13.3	4	12.9

\*Average number of nights of those using particular lodging type.

## 6. Regions Visited

- Southcentral accommodates more visitors than any other region. Southeast ranks second among regions visited, followed by Interior/Northern, Denali/McKinley and Southwest.

- Among Vacation/Pleasure visitors, Southeast is the most visited region, with nearly three out of every four VPs visiting the region. Southcentral is second with two-thirds of the market visiting, followed by Denali/McKinley, Interior/Northern and Southwest.



- Since 1985, Southcentral has moderately increased its market share of visitors, from 66% to 69%, while the Interior/Northern region lost several points, from 44% to 35%. Market share among the remaining regions has remained nearly the same as 1985.

Regions Visited	All Visitors	%	Vacation/Pleasure	%
Southcentral	356,400	69%	230,900	64%
Southeast	307,700	60	258,000	72
Interior/Northern	180,500	35	139,200	39
Denali/McKinley	175,200	34	144,700	40
Southwest	42,000	8	22,800	6
<b>Total</b>	<b>521,100</b>	<b>100</b>	<b>360,300</b>	<b>100</b>

## 7. Communities Visited

- The seven most frequently visited communities by All Visitors and Vacation/Pleasure visitors are identical:

	All Visitors	%	Vacation/Pleasure	%
1. Anchorage	346,100	66%	222,700	62%
2. Juneau	249,700	48	216,500	60
3. Ketchikan	227,400	44	198,700	55
4. Skagway	188,500	36	174,100	48
5. Fairbanks	154,200	30	121,800	34
6. Sitka	127,000	24	117,900	33
7. Seward	122,700	24	89,800	25

- The remaining communities in the top ten for All Visitors are:

8. Kenai/Soldotna	115,300	22%
9. Palmer	108,100	21
10. Homer	99,000	19

- The remaining communities in the top ten for Vacation/Pleasure visitors are:

8. Valdez/PWS	78,000	22%
9. Tok	74,900	21
10. Kenai/Soldotna	69,600	19

## 8. Attractions Visited

- Alaska's ten most visited attractions in 1989 are nearly the same as those in 1985. The top five most visited attractions in 1989 are identical to 1985, beginning with Portage Glacier in the #1 spot, followed closely by the Inside Passage. Juneau's Mendenhall Glacier remains in the #3 position. Three of the top five attractions are glaciers.

- **Ten Most Visited Attractions by All Visitors:**

	Number of Visitors	Percent
1. Portage Glacier	238,800	46%
2. Inside Passage	227,700	44
3. Mendenhall Glacier	200,000	38
4. Glacier Bay	181,500	35
5. Ketchikan Totems	178,500	34
6. Denali/McKinley	175,200	34
7. Skagway's Historic Gold Rush District	175,000	34
8. Anchorage Museum of History & Art	149,700	29
9. University of Alaska-Fairbanks	124,500	24
10. Kenai River	121,200	23

- The Inside Passage tops the list as the most visited attraction for Vacation/Pleasure visitors, followed by the Mendenhall Glacier, Glacier Bay, Skagway and Ketchikan Totems. These five most visited attractions are all in the Southeast region.

- **The ten most visited attractions for Vacation/Pleasure visitors:**

	Number of Visitors	Percent
1. Inside Passage	203,800	57%
2. Mendenhall Glacier	178,100	49
3. Glacier Bay	165,100	46
4. Skagway's Historic Gold Rush District	157,400	44
5. Ketchikan Totems	154,800	43
6. Portage Glacier	145,500	40
7. Denali/McKinley	144,700	40
8. Anchorage Museum of History & Art	103,900	29
9. University of Alaska-Fairbanks	100,200	28
10. Transalaska Pipeline	93,300	26

## C. Visitor Trip Planning

### 1. Alaska Trip Planning Timelines

- The average visitor decides to go to Alaska about eight months in advance and actually makes the travel arrangements five months ahead of time. One-third of all visitors actually decide to go to Alaska a year or more in advance. Peak times for making travel arrangements are six to seven months in advance and shortly before departure. Nearly half the market makes their travel arrangements three months or less before departure.
- Vacation/Pleasure visitors tend to make their Alaska trip timing decision and their travel arrangements moderately earlier than all visitors.

	Average Alaska Planning Timelines	
	All Visitors	Vacation/Pleasure
"When Alaska?" Decision	8.1 months	8.3 months
Trip Arrangements	4.7 months	5.0 months

### 2. Alaska Trip Decision Criteria

- Leading factors which influence the timing of why visitors chose to come to Alaska in 1989 rather than another time included personal reasons (chance to travel with friends/relatives, time available, felt like it, honeymoon/anniversary, etc.), chance to visit friends and relatives and attractions/appeal of Alaska.

	Alaska Trip Decision Criteria	
	All Visitors	Vacation/Pleasure
1. Personal Reasons	32%	40%
2. Visit Friends & Relatives	24	12
3. Attractions/Appeal of Alaska	12	13
4. Long time desire	11	15
5. Recommended by Others	8	10
6. Business	6	-
7. Advertising/Promotion	4	5
8. Price/Discount Considerations	4	4
9. Wanted to Cruise	3	5
10. Trip Extension	2	3
11. Curiosity	2	2
12. Cool Weather	1	2
13. Visit all 50 states	1	1
14. Other	3	3

### 3. Competing with Other Destinations

- Europe is Alaska's leading competitor, followed by Canada, Hawaii and Mexico. Family issues are the leading reason why Alaska is chosen over Europe and Hawaii. These issues include the chance to travel with family members and visiting relatives during the trip.
- Cost is mentioned as a reason for choosing Alaska over four of the top five competitors. This is a new trend and shows Alaska is becoming price competitive.

### 4. Travel History and Future Preferences of Alaska Visitors

- More Alaska visitors have traveled to Europe and Hawaii than any other domestic or overseas destinations in the past five years (26% to both destinations). Europe has lost its popularity among Alaska visitors since 1985 (45% had been to Europe in the five years preceding 1985 as compared to 26% in the five years preceding 1989). Hawaii has maintained its popularity.
- Among all visitors, other destinations most often traveled to in the past five years include Canada (27%), California (27%), Florida (19%), and the Caribbean (10%).
- Alaska edged out Europe as the most preferred (17% vs 16% for Europe) and most probable (14% vs 11%) next travel destination.

### 5. Trip Information Sources

- The most important sources of information for all visitors and Vacation/Pleasure visitors are travel agents, brochures and books, friends and relatives and commercial organizations. Particularly important is the *State of Alaska Official Vacation Planner*, which provides 28% of all visitors and 31% of Vacation/Pleasure visitors with information.

	Trip Information Sources	
	All Visitors	Vacation/Pleasure
1. Travel Agents	65%	69%
2. Brochures/Books	40	44
State Vacation Planner	28	31
3. Friends/Relatives	19	15
4. Commercial Organizations	18	19
5. Media	7	8
6. Previous Visits	5	3
7. Government Organizations (Other than Div. of Tourism)	2	3
8. Other	<1	1

## 6. Other Trip Planning Information

- The majority of all visitors (56%) spend money to buy books, maps and other materials to assist in their trip planning.
- Only one in five of all visitors recall receiving unsolicited Alaska brochures, but those who did were deluged with an average of 13 brochures.
- Nearly two-thirds of all visitors read special newspaper travel sections on Alaska, making newspapers a key media for both sales and information.
- Frequent flyer program mileage is used by someone in three out of ten Domestic Air user parties. Of all visitor parties, 20% had someone in their traveling party using a frequent flyer mileage ticket at some point in their Alaska trip.
- The *Exxon Valdez* Oil Spill of March 24, 1989 affected the Alaska trip planning of one in six visitors. Half of these avoided the spill area. Smaller percentages said they had difficulty finding accommodations in the spill area, didn't go fishing as intended, came to help clean up or had business related to the spill.

## 7. Travel Agent Involvement in Trip Planning

- Travel agents provide a variety of services to Alaska visitors. The two most common are providing brochures and actual booking of cruises or tours. Travel agents are also important for recommending transportation mode, type of trip, travel company and lodging.

	Travel Agent Involvement	
	All Visitors	Vacation/Pleasure
1. Provide Brochures	42%	50%
2. Booked Cruise or Package	38	49
3. Recommended Transportation	22	25
4. Booked Independent Lodging/ Transportation	19	17
5. Recommended Travel Company	11	13
6. Recommended Lodging	8	8
7. Recommended Alaska	7	9
8. Other	8	8

## D. Demographics

- Alaska visitors are very well-educated - nearly half are college graduates. Another one-fourth of all visitors had some college but did not graduate.
- Alaska visitors are moderately well-to-do with average household incomes approaching \$60,000. One in four makes over \$75,000.
- The average Alaska visitor is 49 years old. One in four is 65 years old, twice the proportion of the U.S. population. The number of males and females is almost even. Among Vacation/Pleasure visitors, the average age is 50 years, four years younger than in 1985.
- Over half of all the state's visitors are employed at the time of their visit and a third are retired. On the other hand, four in ten Vacation/Pleasure visitors are employed and as many are retired.
- The West is the most important producer of Alaska visitors, followed by the Midwest, South and East.
- Visitor demographic trends of importance to marketers are the younger age of Alaska visitors (age dropped four years since 1985) and origin shift. The West is declining moderately in importance while Overseas and the South are gaining as producers of Alaska visitors.

Table II-D-1

## Demographics All Visitors – Summer 1989

	Percent of Visitors
<b>Visitor Education</b>	
Not High School Graduates	5%
High School Graduates	25
1 – 3 Years College	22
College Graduate	22
Attended or Completed Graduate School	26
<b>Visitor Household Income (Average – \$56,800)</b>	
Under \$25,000	16%
\$25,000 – \$34,999	18
\$35,000 – \$49,999	21
\$50,000 – \$74,999	19
\$75,000 – \$99,999	11
\$100,000 and Over	14
<b>Visitor Age (Average – 49 Years Old)</b>	
Under 18 Years	7%
18 – 24 Years	4
25 – 34 Years	10
35 – 44 Years	13
45 – 54 Years	18
55 – 64 Years	22
65 – 74 Years	20
75 + Years	5
<b>Visitor Gender</b>	
Male	51%
Female	49%
<b>Visitor Employment</b>	
Employed	52%
Retired	33
Other	15
<b>Visitor Origin</b>	
West	38%
California	15
Washington	7
Midwest	20
South	16
East	12
Canada	8
Overseas	5
Germany/Switzerland/Austria	2
Japan	1

Table IV-D-1

## Demographics

### Vacation/Pleasure Visitors – Summer 1989

	Percent of Visitors
<b>Visitor Education</b>	
Not High School Graduates	5%
High School Graduates	28
1 – 3 Years College	22
College Graduate	21
Attended or Completed Graduate School	24
<b>Visitor Household Income (Average – \$59,000)</b>	
Under \$25,000	14%
\$25,000 – \$34,999	16
\$35,000 – \$49,999	22
\$50,000 – \$74,999	19
\$75,000 – \$99,999	12
\$100,000 and Over	17
<b>Visitor Age (Average – 50 Years Old)</b>	
Under 18 Years	7%
18 – 24 Years	4
25 – 34 Years	7
35 – 44 Years	1
45 – 54 Years	18
55 – 64 Years	24
65 – 74 Years	23
75 + Years	5
<b>Visitor Gender</b>	
Male	49%
Female	51%
<b>Visitor Employment</b>	
Employed	40%
Retired	40
Other	20
<b>Visitor Origin</b>	
West	34%
California	16
Washington	6
Midwest	19
South	18
East	12
Canada	10
Overseas	6
Germany/Switzerland/Austria	3
Japan	1



# Marketing Implications

**Visitor satisfaction and perception of value are high. Maintenance of the quality of the Alaska experience is critical to future market growth and must be one of the state's top priorities.**

Visitors rate their Alaska experience highly, and consider Alaska a better than average buy compared to other destinations. The Alaska experience consistently exceeds visitor expectations.

Alaska's first order of business is maintaining the quality of the Alaska visitor experience. This means preserving the natural environment which provides most of the state's main attractions as well as enhancing the manmade means for experiencing them. This must be done in the face of increasing visitor volume and pressure on some of the state's primary natural attractions. If the quality of the Alaska experience is diminished, negative word of mouth will hinder marketing, fewer visitors will repeat an Alaska trip, and volume is likely to drop. Conversely, if the quality of the experience is maintained and enhanced, repeat visitor volume will continue to increase and the state's best marketing method – positive word of mouth – will bring more first time visitors.

**Alaska can compete successfully with other major travel destinations on the basis of value for the money.**

Visitors see Alaska as competitive with other destinations in terms of value for the money. Alaska can compete on the basis of value received and total cost, not just on the basis of attractions. Marketing appeals can capitalize on the results of the survey, using the implied endorsements of nearly all past visitors. High satisfaction coupled with good competitive value ratings are an excellent endorsement. Cost can now serve as a marketing asset for Alaska rather than being a liability. While Alaska may still suffer from a high cost of living image, visitors perceive the state as a good travel value.

A recession in the domestic economy in the early 1990s plus consumer value consciousness mean marketers will need to have strong value and cost appeals.

**Overseas visitors are particularly critical in their ratings of value and quality.**

To succeed with the European and Japanese markets in particular, the Alaska industry must offer premium accommodations and services as well as premium attractions. Visitors from Alaska's most promising overseas markets rate their trip highly overall. However, their ratings of virtually all trip components –including accommodations, sightseeing/tour service, food service, transportation and shopping – are significantly lower than ratings assigned by the domestic market. The Alaska experience is geared to domestic quality needs. The overseas market is more discriminating and demands higher quality.

## **National and international travel trends are showing up in the Alaska market.**

Tracking national trends and forecasting their impact on the Alaska market should be an integral part of any marketing plan. Current research shows the Alaska market is taking shorter vacations, is younger, purchases more active experiences, and is more quality conscious than in the past. All of these are national and international trends.

## **Alaska is still low on the destination priority ladder for most visitors.**

The results of this study show that the Alaska visitor travels many other places prior to coming to Alaska. As a result, the Alaska visitor is older and less likely to repeat than visitors to the state's primary competitors – Europe, Hawaii, Canada, Mexico and the western United States. If marketers succeeded in placing Alaska earlier on the lifestyle curve of the potential visitor, total visitor volume would increase significantly. A better understanding of how and why visitors make their destination priority choices could bring a marketing breakthrough for Alaska.

## **Alaska marketers might consider re-evaluating the timing of marketing programs.**

State marketing campaigns are designed to fit into visitor trip timing decision patterns identified in previous studies. It is possible that visitor trip timing decisions are now being influenced by the timing of marketing campaigns. This leads one to wonder about factors influencing decision making patterns. If the marketing campaign were timed differently, would decision patterns change? If the marketing program had the dollars available to have a year-round presence in the marketplace, would we see different decision patterns emerge?

Year-round market presence could have significant benefits. A substantial proportion of the visitor population (35%) decides when they are going to visit Alaska more than a year in advance. Another large share of the market (23%) makes the decision when to visit after the bulk of traditional marketing programs are expended. Year-round marketing may reach an important segment of the market that the current seasonal programs do not.

## **Visitor information sources are changing.**

Alaska visitors are relying more and more on the official State Vacation Planner, travel agents and newspaper travel sections for their Alaska trip planning information. Clearly, marketers should assess their programs, making sure their products are placed in front of future visitors through these marketing vehicles. These are best used to appeal to the visitor who has decided to come and is planning their trip.

Because of changing information trends, Alaska marketers should also consider electronic information as well, namely automated telephone response and personal 800 or 900 number information services. Successful marketers around the world routinely offer these services. Alaska could potentially benefit by gaining access to the growing market which avoids the comparatively cumbersome and time consuming process of sending for written information.

On the other hand, magazine advertising appears to be losing some of its inquiry pulling power, and therefore, some of its conversion strength. Few visitors mentioned magazine advertising as a source of Alaska information in the most recent survey. Travel marketing conversions through print media had remained surprisingly strong in the age of television marketing dominance, but this appears to be changing now. Younger markets are less likely to take the time to read and then inquire through magazines. Further, television's pervasive influence is probably changing the decision patterns of Alaska's traditional senior market. Therefore, when Alaska marketers do use magazines, they must select message and media carefully. Finally, more television is necessary for Alaska even to maintain, much less expand, its market presence.

## **Frequent flyer programs have lowered the cost of traveling to Alaska for many, eliminating one of the two major barriers to visiting Alaska.**

In the past cost of travel and the weather perceptions have been major barriers to visitor entry into Alaska. Weather perceptions may be difficult to change, but frequent flyer programs are clearly bringing down the cost barrier for many visitors. Nearly 20% of all visitor parties include someone using a frequent flyer ticket.

Frequent flyer programs are definitely making Alaska more affordable for many visitors, especially those who prefer not to cruise, either because of cost or simple preference. Visitors with time constraints (a larger share as the market gets younger) are also more likely to use air.

Traditionally, airlines have not engaged in price competition for the Alaska market. The short peak season is instead viewed as the time to raise fares and capitalize on summer visitor demand. The winter market is dominated by Business visitors, who tend to be less price sensitive than Vacation/Pleasure visitors. The result is a year-round fare structure which makes Alaska more expensive by air than its primary competitors, Europe, Hawaii, Canada, Mexico, and the western U.S. The only cost cutting alternative, especially for independents, is use of frequent flyer mileage.

There are two important implications of all this. One, a reduction in air fare, by whatever means, could increase Alaska visitor volume. Two, marketers tying in with frequent flyer programs (hotels, rental cars, etc.) are going to benefit.

**Visitor information centers are widely used and contribute to visitor satisfaction.**

The majority of visitors use visitor information centers (VICs), and they report that the VICs are doing a good job. Past studies show that use of VICs enhances visitor satisfaction and the likelihood of returning to Alaska in the future. A visitor using a VIC is more likely to see the best attractions in the local area, have contact with friendly locals, and be more active as a result. Active visitors are happier with their Alaska experience. Visitors who engage in sightseeing and other activities rate their experience higher. In developed destinations worldwide, information centers are considered critical elements of the industry.

With the exception of one visitor information center at Tok, the state of Alaska relies on local communities and government agencies (usually federal) to provide information to visitors. While many communities and agencies do a good job, brochure distribution practices are inconsistent, as are training, hours and seasons of operations, signage, and facility size and quality. Additionally, most agency information centers are oriented towards single attractions and some communities limit the types of information and brochures which they offer.

Some progress is being made – through the Division of Tourism Travel Counselor Workshop program, for example. However, much more effort is needed to provide visitors statewide with complete, top quality information services. Such effort will pay dividends in increased visitor satisfaction, additional repeat volume, increased positive word of mouth marketing, and increased instate sales.



## **Chapter II. Statewide Overview All Visitors**

- A. Visitor Opinions**
- B. Visitor Travel Patterns**
- C. Visitor Trip Planning**
- D. Demographics**

# Chapter II: Visitor Opinions

## A. Visitor Opinions

### Overall Alaska Trip Ratings

Visitors were extremely pleased with their overall Alaska trip experience, rating it 6.3 on the 1 to 7 scale, slightly higher than in 1985. In fact, half of all visitors gave their Alaska trip the highest rating, a 7 (excellent). Satisfaction is high among almost all types of visitors, with average ratings ranging only from 5.9 (Business visitors) to 6.4 (six groups).

The Alaska experience also exceeded most visitors' expectations. The average rating was 5.9. Only 2% of all visitors felt their expectations were not met or exceeded. Highest ratings were by Cruiseship visitors and Easterners, lowest were Highway and Overseas visitors.

On the other hand, value for the money ratings are lower, nearly a full point lower than that of the overall experience. More revealing is the low percentage (17%) of visitors granting Alaska the highest (7) rating for value. Most critical of Alaska's value-for-the-money are the two most important Overseas markets (Germany/Switzerland/Austria and Japan), the Highway market, and Independents. The highest value perception is by visitors using Cruiseships.

Ironically, lower value perception doesn't detract from the quality of the trip experience. Overseas visitors and Independents still gave their trip experience the highest ratings. The message seems to be: "The Alaska experience is great, but give me a better deal and improve your facilities, food and service."

Graph II-A-1

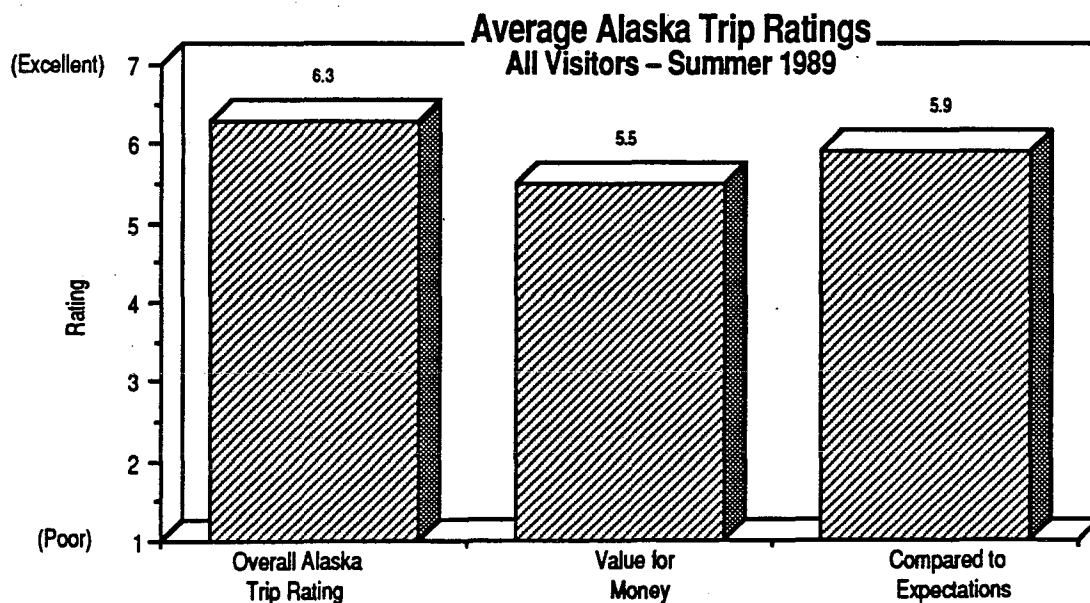


Table II-A-1

**Average Alaska Trip Ratings – By Visitor Type**  
**All Visitors – Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

Visitor Type	Overall Alaska Trip Rating	Value For Money	Compared To Expectations
<b>Total</b>	<b>6.3</b>	<b>5.5</b>	<b>5.9</b>
<b>Trip Purpose</b>			
Vacation/Pleasure	6.3	5.5	5.9
Visiting Friends & Relatives	6.2	5.3	5.8
Business & Pleasure	6.3	5.3	5.7
Business Only	5.9	5.5	6.7
<b>Entry Mode</b>			
Domestic Air	6.2	5.4	5.9
Cruiseship	6.4	5.9	6.2
Highway/Private Vehicle	6.0	5.1	5.5
Ferry	6.3	5.3	5.7
International Air	6.1	5.3	5.7
<b>Mode Use</b>			
Domestic Air	6.3	5.4	5.9
Cruiseship	6.4	5.8	6.2
Highway/Private Vehicle	6.1	5.1	5.5
Ferry	6.3	5.2	5.8
International Air	6.2	5.4	5.7
<b>Intended Travel Type</b>			
Package Tour	6.4	5.8	6.1
Independent	6.3	5.2	5.8
Inde-Package*	6.4	5.1	5.8
<b>Origin</b>			
United States Total	6.3	5.5	5.9
West	6.2	5.6	5.8
California	6.2	5.6	5.9
Washington	6.2	5.4	5.4
South	6.3	5.4	5.9
Midwest	6.4	5.4	6.1
East	6.4	5.7	6.2
Canada	6.1	5.5	5.8
Overseas	6.3	5.4	5.7
Germany/Switzerland/Austria	6.3	5.1	5.7
Japan	6.2	5.3	5.7

\* Inde-Package visitors are Independents who plan to purchase in-state sightseeing tours during their trip.



## Value for the Money Ratings

Nine aspects of the overall Alaska trip received value for the money ratings from visitors. People (friendliness/helpfulness) and sightseeing/attractions were rated the best values (6.2 and 6.0, respectively) while accommodations and restaurants received the lowest ratings, both at 5.2 on the one to seven scale. In between these extremes are ratings for activities (5.7) and four categories of transportation (all rated 5.5).

More revealing than the average rating is the percent of visitors giving the top "7" rating for value. This percentage ranges from just 16% (restaurants) and 18% (accommodations) to 48% for friendliness/helpfulness and 39% for sightseeing/attractions.

The lowest ratings, for every aspect except people, were given by visitors from Germany/Switzerland/Austria and Japan. Overseas visitors in general rated trip aspects lower than either the domestic or Canadian markets. The international traveler is more experienced and is accustomed to premium experiences, facilities and food. Business visitors were also more critical across the board, again a reflection of travel experience.

Cruiseship visitors and package visitors (most of whom use a cruiseship) gave the highest value ratings and, among mode groups, Highway visitors were least satisfied with value received.

Graph II-A-2

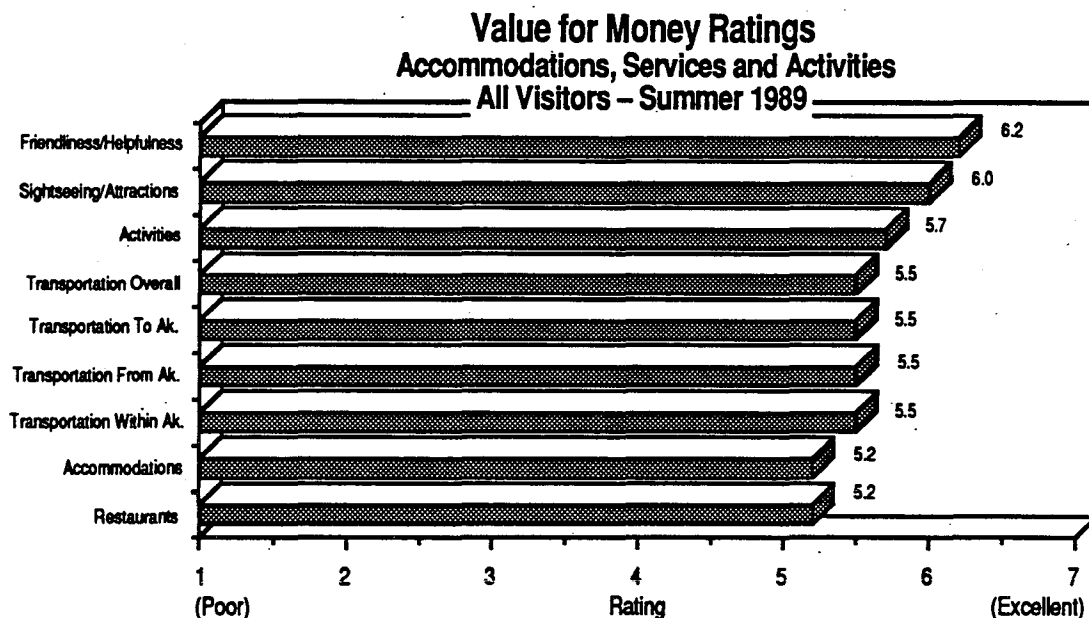


Table II-A-2

**Value for The Money Ratings**  
**Accommodations, Services, and Activities**  
**All Visitors – Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

Visitor Type	Friend- liness/ Helpful- ness	Sight- -seeing Attrac- tions	Activ- ities	Transpor- tation Overall	Trans- portation To	Transpor- tation From	Trans- portation Within	Accom- moda- tions	Res- taur- ants
<b>All Visitors</b>	6.2	6.0	5.7	5.5	5.5	5.5	5.5	5.2	5.2
<b>Trip Purpose</b>									
Vacation/Pleasure	6.3	6.0	5.6	5.6	5.6	5.5	5.6	5.3	5.2
Visiting Friends & Relatives	6.2	6.2	5.8	5.5	5.5	5.2	5.4	5.2	5.3
Business & Pleasure	5.8	6.3	6.0	5.4	5.4	5.4	4.8	4.5	5.0
Business Only	6.1	6.0	6.0	3.7	3.3	4.0	5.0	5.0	4.4
<b>Mode Use</b>									
Domestic Air	6.2	6.1	5.7	5.6	5.6	5.4	5.5	5.1	5.1
Cruiseship	6.5	6.0	5.7	5.9	5.9	5.8	5.9	5.8	5.5
Highway/Private Vehicle	6.1	5.9	5.4	4.8	4.5	4.8	5.1	4.7	4.9
Ferry	6.1	6.0	5.5	5.2	5.1	5.3	5.1	4.8	4.6
International Air	6.4	5.7	5.6	5.5	5.5	5.2	5.0	5.2	5.1
<b>Travel Type</b>									
Package Tour	6.4	6.0	5.7	5.8	5.8	5.7	5.8	5.7	5.5
Independent	6.1	6.1	6.0	5.3	5.2	5.1	5.1	4.9	4.9
Inde-Package*	6.2	6.1	5.7	5.2	5.4	5.3	5.3	4.7	5.0
<b>Origin</b>									
United States Total	6.2	6.1	5.7	5.5	5.5	5.5	5.5	5.2	5.2
West	6.1	6.1	5.8	5.5	5.7	5.5	5.4	5.2	5.0
California	6.3	5.9	5.8	5.7	5.7	5.6	5.4	5.4	5.2
Washington	5.9	6.2	5.9	5.4	5.6	5.6	5.6	5.1	4.9
South	6.3	6.0	5.6	5.4	5.5	5.5	5.5	5.2	5.3
Midwest	6.3	6.1	5.7	5.4	5.5	5.4	5.7	5.1	5.2
East	6.3	6.1	5.6	5.6	5.3	5.3	5.7	5.6	5.4
Canada	6.2	6.0	5.7	5.5	5.5	5.6	5.5	5.3	5.5
Overseas	6.3	5.7	5.4	5.7	5.5	5.3	5.0	5.1	4.9
Germany/Switzerland/ Austria	6.5	5.8	5.5	4.6	5.4	5.1	4.5	4.6	4.8
Japan	6.2	4.9	5.0	-	4.6	4.6	4.5	5.1	4.9

\* Inde-Package visitors are Independents who plan to purchase in-state sightseeing tours during their trip.

## Regional Satisfaction Ratings

Visitors rated 32 features of their Alaska trip in each region they visited, doing so on the 1 (poor) to 7 (excellent) scale. Table II-A-3 provides rating detail. Flightseeing, day cruises and rafting in all regions lead the way in visitor satisfaction. Lowest scoring features tended to be restaurants/nightlife, shopping and select accommodations and transportation modes.

Among accommodations, hotels/motels ranked lowest along with RV/campgrounds. These ratings varied little among regions except for a lower hotel/motel score in Southwest Alaska. The low campground ratings are supported by critical comments on the condition of the parks and campgrounds in Alaska. The highest lodging ratings went to lodges in Southwest (6.5) and Southeast (6.4). Bed and breakfast places were the highest rated form of lodging except for Cruiseships. Resort/lodge ratings are up significantly since 1985, but ratings of other types of accommodations remained unchanged and in the case of hotels/motels, declined in four of five regions (Denali/McKinley hotel/motel ratings improved).

The top instate transportation rating (6.6) went to the Alaska Railroad in the Interior, a tribute to the dome car trend. Cruiseships in Southeast and Southcentral were next at 6.3. The train in Southeast (5.0) and certain rental vehicle locations were least popular. Transportation ratings in general changed little in the past four years except for lower ferry ratings in Southeast - perhaps the aging of the system is apparent to today's visitor.

Restaurant/nightlife scores improved moderately since 1985 in Interior, Southwest and Denali/McKinley but were still lower than most other scores. Although all regions except the Interior showed improvement, shopping was still rated mediocre. Southcentral and Southeast had the best scores but those were still in the low 5s.

Visitor information centers receive good scores (5.8 to 6.0) in four regions and a fair score in Southwest. Three regions improved their ratings since 1985. Information centers are important to visitor satisfaction and are doing a good job, visitors say.

Visitors like their sightseeing experiences. Sightseeing is lead by flightseeing with 6.4s and 6.5s in four regions. Day cruises follow with 6.1 and 6.2 ratings across the entire state. Rated significantly lower, but still well rated, are city tours in all regions. The "other tour" category got slightly higher marks than city tours.

Cultural Attractions and Museums get fairly good ratings (5.7 in Denali/McKinley to 6.0 in the Interior) in all regions except Southwest, with a lukewarm 5.1 rating. Both Southcentral and Interior ratings are up slightly since the 1985 survey.

Rafting leads the way among activities (6.1 in Southeast to 6.9 in Southwest), showing improvement since 1985. Hiking experience ratings fell a bit in four years except in Southeast where ratings rose up to 6.1 to match Denali/McKinley for the best hiking ratings. Three regions lost some ground in their fishing ratings. But Southwest, where the best freshwater fishing is, was rated even higher than in the past at 6.5. Paddlers enjoy canoeing and kayaking in Southeast, Southcentral and Southwest Alaska.

Table II-A-3

**Regional Satisfaction Ratings**  
**Accommodations, Services, and Activities**  
**All Visitors – Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	South- east	South- central	Interior	South- west	Denali/ McKinley
<b>Accommodations</b>					
Hotel/Motel	5.1	5.1	5.0	4.2	5.5
Resort/Lodge	6.5	5.5	4.9	6.4	5.6
Bed & Breakfast	6.0	5.7	5.9	6.9	6.0
RV/Campground	5.1	5.2	5.1	5.3	5.2
Cruiseship	6.3	6.1	–	–	–
Ferry	5.5	6.0	–	4.9	–
<b>Transportation</b>					
Bus	5.2	5.7	5.8	4.9	5.7
Train	5.0	6.0	6.6	–	6.2
Air	5.7	5.5	6.0	5.7	5.6
Cruiseship	6.3	6.3	–	–	–
Ferry	5.7	6.1	–	6.1	–
Rental Car	5.4	5.7	5.9	5.5	6.1
Rental RV	4.6	5.8	6.1	–	6.1
<b>Restaurants/Nightlife</b>	5.2	5.1	5.0	4.5	4.8
<b>Shopping</b>	5.2	5.3	4.9	4.6	4.6
<b>Visitor Information Centers</b>	5.9	6.0	6.0	5.2	5.8
<b>Sightseeing</b>					
Flightseeing	6.4	6.4	6.5	5.8	6.5
Day Cruises	6.1	6.2	6.2	6.2	6.1
City Tours	5.8	5.7	5.8	6.0	5.7
Other Tours	5.9	5.9	5.9	5.8	6.0
<b>Cultural Attractions/ Museums</b>	5.8	5.9	6.0	5.1	5.7
<b>Activities</b>					
Canoeing/Kayaking	6.4	6.1	4.2	6.8	5.6
Rafting	6.1	6.3	6.5	6.9	6.2
Hiking	6.1	6.0	5.6	5.7	6.1
Fishing (Overall)	5.9	5.7	5.6	6.5	4.9
Freshwater Fishing	5.8	5.5	5.4	6.3	4.6
Saltwater Fishing	5.8	5.6	–	6.0	4.2
Wildlife Viewing	5.8	5.9	5.4	5.9	6.1
Bird Watching	5.7	5.6	5.2	5.4	5.6
Hunting	–	4.8	5.0	6.8	–
Downhill Skiing	–	–	–	–	–
Cross Country Skiing	–	–	–	–	–
Dogsledding	–	–	–	–	–

## Likelihood of Visiting Alaska Again

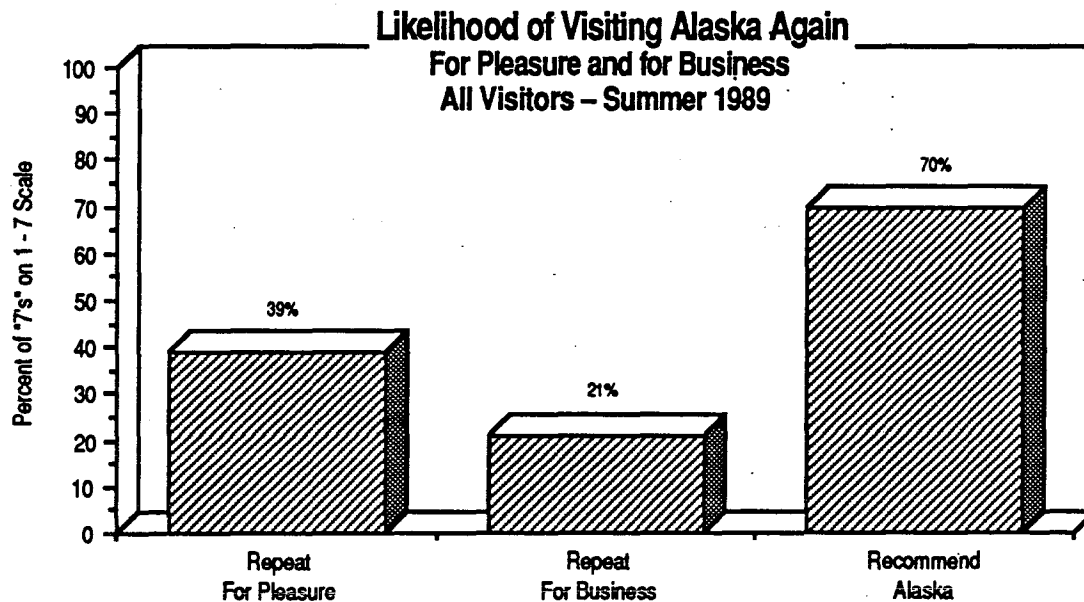
Visitors were asked how likely they were to visit Alaska again for pleasure in the next five years. A 1 (very unlikely) to 7 (very likely) scale was used and four in ten visitors said "very likely", a 7 score. That is good news for the future, because in the past, only 20% of these same visitors had been to the state in the previous five years. Half as many expect to return for business as for pleasure.

Visitor types most likely to return for pleasure are those Visiting Friends and Relatives (67% very likely) and visitors combining Business and Pleasure (70%). Other groups more likely than average to return are Domestic Air and Highway users. Least likely to return by a wide margin are Cruiseship users (17%).

While not all visitors are likely to return, most of them intend to recommend Alaska to friends and relatives. Seven of ten said "very likely" and another two of ten said "quite likely". However, two percent did not hesitate to say it is unlikely they will recommend visiting Alaska.

Alaska visitors are true to their word. A second question positioned later in the survey asked if they actually had recommended Alaska as a result of their trip. Amazingly, almost all of them had done so in the two to three months between their return home and the time they answered the survey. Ninety-four percent of all visitors had recommended Alaska to someone, and 96% of Vacation/Pleasure visitors had done so.

Graph II-A-3



## Misconceptions About Alaska

When asked, "What is the biggest misconception you had about Alaska that was cleared up by your trip?", visitors said, "Weather". One third said the weather was better than expected while less than one percent said the weather was worse. These results may not be so much a commentary on great weather but rather evidence that a large share of the market apparently expects less than desirable weather and is still motivated enough to risk a trip.

Most pleasantly surprised by the weather (and probably the least knowledgeable about Alaska) are International Air and Cruiseship visitors. About half of them expected the weather to be worse. Least surprised by the weather (and probably most knowledgeable because of their high repeat visit rates) were Highway and Ferry users.

Of those who had any misconception cleared up by their trip, nearly half said Alaska was "better than expected", only one in twelve, replied "worse". About one in seven said Alaska was certainly different than they thought it would be. The size of the state and breaking of the Eskimo stereotype were the leading differences.

Table II-A-4

### Biggest Misconception Cleared Up By Visit to Alaska All Visitors - Summer 1989

<b>Better Than Expected</b>	<b>47%</b>
Weather	32
Appeal of Alaska/Attractions	7
Roads	4
Prices/Cost	2
Other	2
<b>Different Than Expected</b>	<b>14%</b>
<b>Worse Than Expected</b>	<b>8%</b>
Appeal of Alaska/Attractions	4
Prices/Cost	2
Facilities/Transportation	1
Roads	1
Weather	<1
Other	<1

## B. Visitor Travel Patterns

Readers should note that minor differences in entry, exit, and mode market data exist between *Alaska Visitor Arrivals, Summer 1989*, and this publication. The data below is more accurate, since it is a record of actual behavior made after the trip while arrival data was expected behavior upon arrival in Alaska. Actual behavior and intended behavior, as recorded in the arrival survey and the patterns, opinions and planning survey, respectively, also differ slightly in travel type and length of stay.

### Entry and Exit Modes

The most common means of entry into Alaska for all visitors is Domestic Air. About half of all visitors enter by that mode and one fourth enter first by Cruiseship. One in eight first enter Alaska by Highway while one of twenty come by the Alaska Marine Highway (Ferry). One visitor in thirty uses International Air to enter the state. Exit patterns closely mirror entry patterns.

Table II-B-1

### Entry and Exit Modes (Excludes Seasonal Workers) All Visitors - Summer 1989

Mode	Entering Visitors	Percent	Exiting Visitors	Percent
Domestic Air	270,400	52%	271,900	52%
Cruiseship	142,100	27	134,500	26
Highway-Private Vehicle	68,100	13	64,000	12
Ferry	24,400	5	27,200	5
International Air	15,600	3	19,000	4
Other	-	-	200	-
Non-Response	500	-	4,200	1
<b>Total</b>	<b>521,000</b>	<b>100%</b>	<b>521,000</b>	<b>100%</b>

## Total Mode Market

Perhaps more important to marketers than entry and exit mode totals, are the total mode markets. This is the total number of visitors using a particular mode either to enter Alaska, exit Alaska, or both. This number better defines the total market using each mode. For example, the total market of ferry users is 43,100, a far larger number than the 24,400 who simply entered the state on that mode. This means the ferry market is about 8% of all visitors, not 5%.

Nearly two thirds of the market uses Domestic air for entry, exit or both. Cruiseship users are more than a third of the market. One of six visitors is part of the Highway market, one out of every twelve uses the Alaska Marine Highway. And International Air is used by one in twenty-three visitors.

The majority of visitors enter and exit by the same mode but significant proportions of each mode market change modes. Eighty percent of the total visitors in the ferry market change modes, as do half of the visitors in the Cruiseship and International Air markets. Forty percent of Highway visitors use another mode for either entry or exit but only a third of Domestic Air visitors change modes. Clearly, marketers of any mode must consider their clients' use of other modes.

Table II-B-2

### Mode Market Size (Excludes Seasonal Workers) All Visitors - Summer 1989

Mode	Entering Visitors Only	Exiting Visitors Only	Visitors Entering and Exiting	Total Mode Markets
Domestic Air	58,000	59,500	212,400	329,900
Cruiseship	53,000	45,400	89,100	187,500
Highway-Private Vehicle	18,500	14,400	49,600	82,500
Ferry	15,900	18,700	8,500	43,100
International Air	3,500	6,900	12,100	22,500



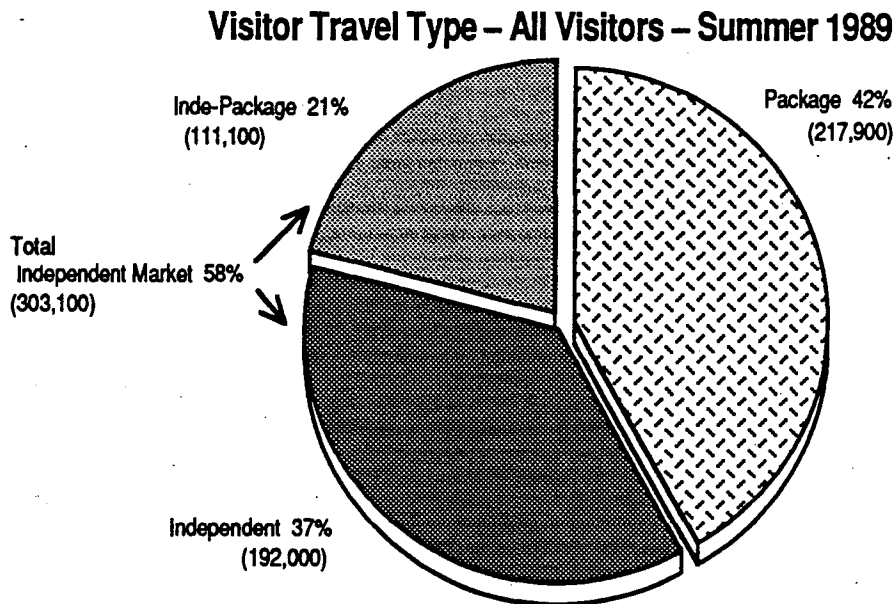
## Visitor Travel Type

The majority of Alaska visitors (58%) are traveling as Independents, not on a prearranged package tour. However, over a third of these Independents actually purchase sightseeing tours once they arrive in Alaska. These visitors are defined as Inde-Package visitors, meaning their basic trip is arranged independently but part of their actual Alaska experience includes purchasing sightseeing tours instate, usually day tours, day cruises or flightseeing.

The trend is for the Inde-Package market to continue growing. Arrival and expenditure data from previous AVSP studies show more consumer awareness of in-state tours. The percentage of all visitors (when asked upon their arrival) expecting to purchase sightseeing tours once inside the state increased from 3% to 19% between 1985 and 1989.

The proportion of all visitors seeing Alaska on package tours is slightly lower than in 1985, 42% vs 44%, evidence of slightly stronger growth in the Independent market than the Package market through 1989. However, 1990 data may reverse this minor trend because of a significant increase in cruiseship-related package visitors.

Graph II-B-1



## Package Tour Travel Type

Nearly half the total market does use a package tour for their Alaska trip and the cruiseship experience is the critical element for most of them. Seventeen out of twenty package visitors use a cruiseship for part or all of their Alaska trip.

The largest package tour market is still round trip cruises of the Inside Passage, accounting for 41% of the package market and 17% of the entire Alaska visitor market. However, recent trends in product design are making other forms of package touring more popular.

The Cruise/Tour market (using a ship one way, flying the other, and touring Alaska in between) is the second most important type of package tour with 23% of the package market. This market is economically important because Cruise/Tour visitors are also some of Alaska's best spenders.

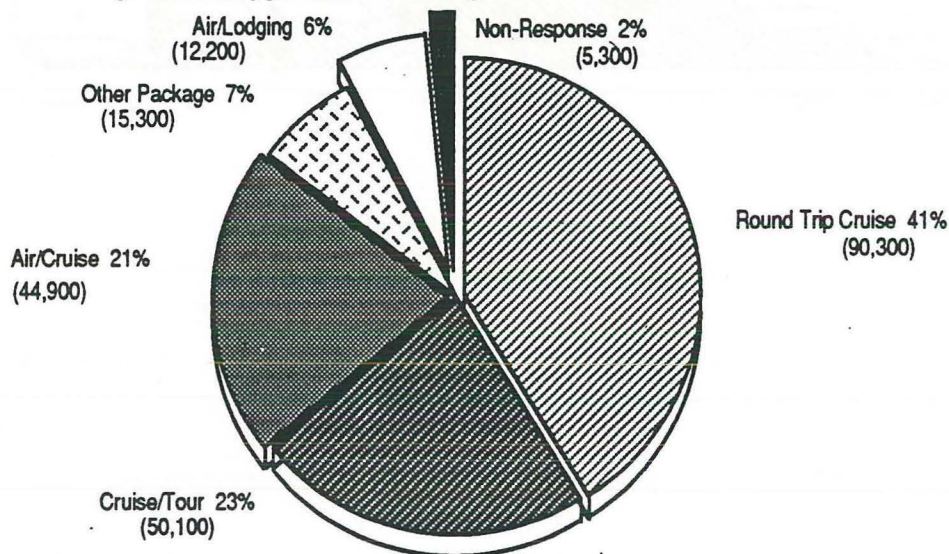
The Air/Cruise market (21% of package visitors) involves using a cruiseship one way, flying the other, but not staying in more than one Alaska location, usually Anchorage and usually for one night only.

The balance of package tours (15% of the market) do not involve a cruiseship and include fishing resort packages, air/lodging tours, a small number of package tours using the ferry system and adventure tours. Air/lodging is 6% of the package market and all others combined total 7%.

Since 1985, two trends are evident: Air/Cruise tours have shown real growth and have become almost as important as Cruise/Tours. Second the itinerary of the Cruise/Tour market has changed dramatically. Many Cruise/Tour packages are no longer using motorcoach between Skagway and Interior Alaska. Instead, ships steam across the Gulf of Alaska from Southeast to Southcentral and utilize the Alaska Railroad to offer the Denali and Interior Alaska experiences.

Graph II-B-2

Package Tour Type – All Package Visitors – Summer 1989



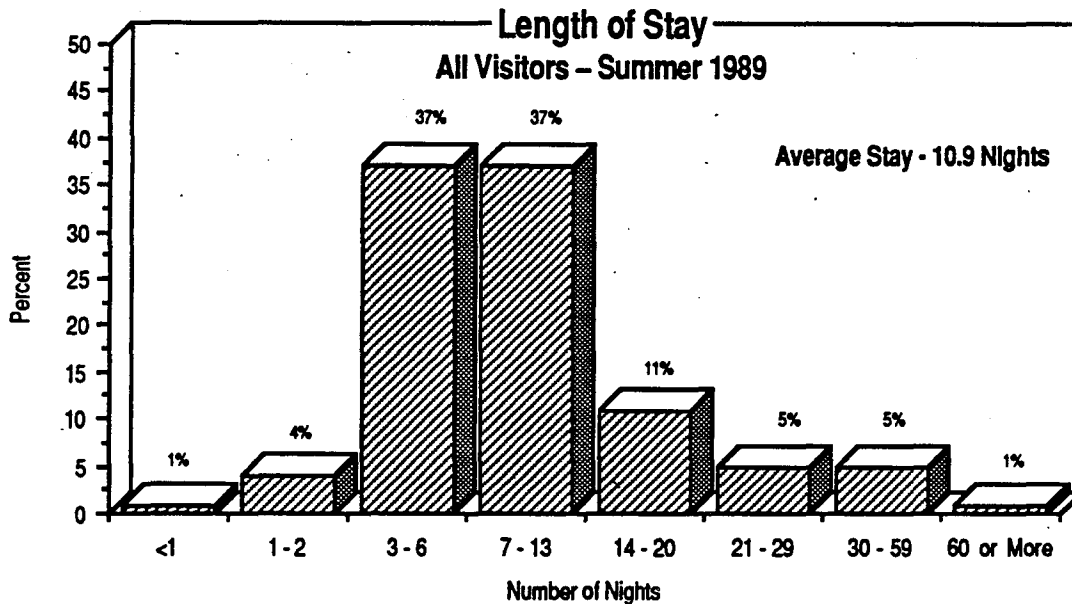
## Length of Stay

The average Alaska visitor is in Alaska for 11 nights, half of a night less than four years ago. This probably reflects national trends toward shorter but more frequent vacations, and also partly explains why per person spending is about the same as four years ago.

While the average is 11 nights, over four in ten visitors actually stay less than a week in Alaska. A full 37% stay 3 to 6 nights, a category which includes 90,000 round trip cruisers. Another four in ten Alaska visitors stay between one and two weeks, the duration of most package tours and the length of stay of half of the Domestic Air market.

Longest staying visitors, in order, are those who come to Visit Friends and Relatives, the Ferry market, Inde-Package visitors, Europeans, International Air users in general, the Highway market and Midwesterners. Length of stay for these groups ranges from 13 to 17 nights. Shortest stays are by round trip cruisers, Canadians, and Air/Cruise visitors. These groups stay for five to seven nights.

Graph II-B-3



## Lodging Type

The most common lodging for Alaska visitors are hotels/motels. Nearly half of all visitors use them compared to just over a third using the next most common overnight facility, a cruiseship. A fourth of the total market uses private homes while one in five uses resorts/lodges and RV campgrounds. About one in ten visitors overnights on the Alaska Marine Highway. A form of lodging not on the 1985 survey, Bed and Breakfast, is fast becoming a major category, accommodating one in twelve visitors.

The average stay in each type of lodging (among only those using each lodging type) ranges from just two nights on the ferry and three in resorts/lodges to ten days in RV/campgrounds and nearly two weeks by visitors enjoying the hospitality of Alaskan homes.

Since 1985, a larger share of the market uses resorts/lodges and bed and breakfasts while slightly smaller shares use private homes, RV/campgrounds and cruiseships. These losses are likely related to trends in trip purpose (VFRs are a smaller share of the market) and travel type (more independents arriving by air, using neither cruiseships nor RV/campgrounds). The length of stay in each of these last three categories has also declined slightly while stays in resorts/lodges have increased. Hotels/motels kept a steady 48% market share in spite of the increase in bed and breakfast use. However, the average stay in hotels/motels dropped by a full night from 5.2 in 1985.

Table II-B-3

### Lodging Type All Visitors - Summer 1989

	Average Number of Nights by All Visitors	Percent of All Visitors Using This Lodging	Average Number of Nights Visitors Use This Lodging
Hotel/Motel	1.9	48%	4.1
Resort/Lodge	0.6	20	2.9
Bed & Breakfast	0.3	8	3.4
Private Home	3.4	27	12.4
RV/Campground	1.9	20	10.2
Cruiseship	1.8	37	5.1
Ferry	0.2	9	2.4
Other	0.7	6	13.3

## Regions Visited

Southcentral accommodates more total visitors than any other region. Because of the large population and economic base, this region attracts the lion's share of the VFR and Business markets. At the same time, its role as the state's transportation hub and its well developed visitor infrastructure brings in more Vacation/Pleasure volume than any region except Southeast. Southeast's second place ranking among regions visited is enhanced by the large round trip cruise market which is concentrated there.

The Interior/Northern region is strong in both the Highway and Package tour market. Its substantial population and economy also draw VFR and Business visitors. Denali/McKinley draws heavily on Vacation/Pleasure visitors because the lack of urban development there limits Business and VFR visits. Southwest, the most remote region, draws special interest visitors. They are primarily resort/lodge sportspersons who spend well, but are limited in number.

Since 1985, Southcentral has moderately increased its market share of visitors to 69% while the Interior/Northern region lost several points and now hosts 35% of all Alaska visitors. Lack of strong growth in the important Highway market and no participation in the new air/cruise market (where visitors cruise one way and fly the other without touring the rest of Alaska) bring down the Interior/Northern market share. However, one package trend benefits the Interior/Northern region, particularly Fairbanks. Most Cruise/Tour visitors, who are good spenders, now spend two nights rather than one in Fairbanks, due to the increasing attractiveness of that area.

The remaining three regions have retained virtually the same market shares as they had four years ago.

Table II-B-4

### Regions Visited All Visitors - Summer 1989

Region	Number of of Visitors	Percent of Total Visitors
Southcentral	356,400	69%
Southeast	307,700	60
Interior/Northern	180,500	35
Denali/McKinley	175,200	34
Southwest	42,000	8
<b>Total</b>	<b>521,100</b>	<b>100%</b>

## Communities and Places Visited

Eleven communities and places (Denali/McKinley and Glacier Bay) received more than 100,000 visitors in Summer 1989. Anchorage tops the list with nearly 350,000 visitors, or two thirds of the state total. Seven other communities hosted between 50,000 and 100,000.

Visitors also frequented the smaller, more remote areas. In addition to the 32 most visited locations, other places received nearly 120,000 visits.

Statewide ranking and market share are shown in Table II-B-5, while regional groupings and shares are detailed in Table II-B-6.

In Southeast, Juneau remains the hub of tourism flow, with Ketchikan gaining. Juneau hosts 81% of Southeast visitors, Ketchikan 74%. Ketchikan has gained as a popular cruiseship stop and is the hub for several outlying fishing resorts as well as for traffic to Metlakatla and Prince of Wales Island. Skagway volume is up considerably due to growth in the cruise market and the inclusion of Skagway as a highway survey point for the first time in the 1989 survey. Sitka (41% of the regional market) and Haines (23%) are also major players in the regional visitor industry.

Anchorage made significant gains in total volume, hosting 97% of all Southcentral regional visitors, a fact which demonstrates that city's central role in regional and statewide tourism traffic. The well developed accommodations, transportation facilities and attractions of the immediate Anchorage area create this role for the state's largest city. Tourism is well distributed in the Southcentral region with seven communities capturing at least a fourth of the region's market. Several Kenai Peninsula locations host good numbers of Southcentral visitors.

In the Interior/Northern region, Fairbanks takes the Anchorage role and hosts 85% of the region's total, due both to available facilities and the growing number of attractions in the area. Tok, though a small community, captures half the region's market as visitors stop while in route to other areas of the state. Other important communities are accessible only by air so volumes drop to between 6,000 and 11,000 for Alaska's Arctic cities of Barrow, Nome and Kotzebue.

Southwest Alaska visitor volume is heaviest in King Salmon (as a central transportation hub) and Kodiak, the region's largest city. No other locations got more than 12% of the regional market.

Overall, no major shifts have occurred in market shares of individual communities and places since the previous survey in 1985. The top twenty remained the same, and these shifted in order only slightly. Arctic volume appears off a bit from 1985 while more visitors seem bound for the smaller remote locations in the Southcentral and Interior regions.

Table II-B-5

## Communities and Places Visited All Visitors – Summer 1989

	Total Visitors	Percent Visiting Community or Place
<b>Total Visitors</b>	<b>521,000</b>	<b>100%</b>
Anchorage	346,100	66
Juneau	249,700	48
Ketchikan	227,400	44
Skagway	188,500	36
Denali/McKinley	175,200	34
Glacier Bay	168,100	32
Fairbanks	154,200	30
Sitka	127,000	24
Seward	122,700	24
Kenai/Soldotna	115,300	22
Palmer	108,100	21
Homer	99,000	19
Valdez/Prince William Sound	97,100	19
Wasilla	90,500	17
Whittier	86,800	17
Tok	86,200	17
Haines	72,300	14
Glennallen	60,700	12
Wrangell	42,100	8
Petersburg	29,800	6
King Salmon	18,000	3
Cordova	11,100	2
Kodiak	10,600	2
Nome	10,500	2
Prudhoe Bay	10,000	2
Kotzebue	9,000	2
Barrow	6,200	1
Bethel	5,100	1
Aleutians	5,000	1
Dillingham	3,700	1
Katmai	3,500	1
Iliamna	2,100	<1
Other Kenai Peninsula Communities	53,400	10
Other Southcentral Locations	24,200	5
Other Interior/Northern Locations	21,300	4
Other Southeast Locations	10,300	2
Other Southwest Locations	9,900	2

Table II-B-6

**Communities and Places Visited  
By Region  
All Visitors – Summer 1989**

	Number of Visitors	% Of All Visitors to AK.	% of Visitors To Region
<b>Southeast</b>	<b>307,700</b>	<b>60%</b>	<b>100%</b>
Juneau	249,700	48	81
Ketchikan	227,400	44	74
Skagway	188,500	36	61
Glacier Bay	168,100	32	55
Sitka	127,000	24	41
Haines	72,300	14	23
Wrangell	42,100	8	14
Petersburg	29,800	6	10
Other Southeast Locations	10,300	2	3
<b>Southcentral</b>	<b>356,400</b>	<b>69%</b>	<b>100%</b>
Anchorage	346,100	66	97
Seward	122,700	24	34
Kenai/Soldotna	115,300	22	32
Palmer	108,100	21	30
Homer	99,000	19	28
Valdez/Prince William Sound	97,100	19	27
Wasilla	90,500	17	25
Whittier	86,800	17	24
Glennallen	60,700	12	17
Other Kenai Peninsula Communities	53,400	10	15
Cordova	11,100	2	3
Other Southcentral Locations	24,200	5	7
<b>Interior/Northern</b>	<b>180,500</b>	<b>35%</b>	<b>100%</b>
Fairbanks	154,200	30	85
Tok	86,200	17	48
Nome	10,500	2	6
Prudhoe Bay	10,000	2	6
Kotzebue	9,000	2	5
Barrow	6,200	1	3
Other Interior Locations	21,300	4	12
<b>Southwest</b>	<b>42,000</b>	<b>8%</b>	<b>100%</b>
King Salmon	18,000	3	43
Kodiak	10,600	2	25
Bethel	5,100	1	12
Aleutians	5,000	1	12
Dillingham	3,700	1	9
Katmai	3,500	1	8
Iliamna	2,100	<1	5
Other Southwest Locations	9,900	2	24
<b>Denali/McKinley</b>	<b>175,200</b>	<b>100%</b>	<b>100%</b>



## Attractions Visited

Tables II-B-7 (statewide) and II-B-8 (by region) detail visits to 58 of Alaska's most popular attractions. Alaska's top ten attractions in 1989 are nearly the same as those in 1985. The top five most visited attractions in 1989 are identical to 1985, beginning with Portage Glacier in the #1 spot, followed closely by the Inside Passage. Juneau's Mendenhall Glacier remains in the #3 position. In fact, three of the top five attractions are glaciers (#5 is Glacier Bay).

The second five is led by Denali, Skagway's Historic Gold Rush District (up to #7 from #10) and the Anchorage Museum of History and Art, which jumped from #11 to #8. Skagway's increase was affected by more ships and including the city as a highway survey point. The Anchorage Museum's popularity is a result of substantial increases in visitor traffic to the city. The University of Alaska retained the #9 position, followed by the popular fisherman's destination, the Kenai River at #10.

Some significant changes show the Transalaska Pipeline falling from #7 to #11 and Alaskaland from #12 to #20. New entries in the top twenty are the Alaska State Museum in Juneau and Alyeska Ski Resort. Neither were listed in 1985.

Since the 1985 survey, the list of attractions on the survey was expanded to 58 from 44, so comparisons are not particularly useful beyond the top attractions. Additionally, new attractions throughout the State have very successfully gone into operation. For example, the recently established Musk Ox Farm, outside of Palmer (not included in this 1989 survey) hosted over 28,000 visitors and residents according to management sources this past season.

Overall the analysis of attractions shows more attractions on line and substantial visits to most of them. Forty-three attractions had at least 10,000 visitors and twenty-five had over 50,000. The Alaska attraction infrastructure is growing, improving the overall visitor experience.

Some evidence of the oil spill impact shows in data for Prince William Sound. Although total visits increased from 76,100 to 85,500, total market share for Prince William Sound declined from 19% to 16% between 1985 and 1989. However, total Alaska visitors increased significantly between 1985 and 1989.

Table II-B-7

## Attractions Visited Statewide All Visitors – Summer 1989

Attraction	Number of Visitors To Attraction	Percent of Visitors Visiting Attraction
<b>Total Visitors</b>	<b>521,000</b>	<b>100%</b>
Portage Glacier	238,800	46
Inside Passage	227,700	44
Mendenhall Glacier	200,000	38
Glacier Bay	181,500	35
Ketchikan Totems	178,500	34
Denali/McKinley	175,200	34
Skagway's Historic Gold Rush District	175,000	34
Anchorage Museum of History & Art	149,700	29
University of Alaska - Fairbanks	124,500	24
University of Alaska Museum	97,500	19
Large Animal Research Station	45,100	9
Agricultural & Forestry (Experimental Station Farm)	28,900	6
Geophysical Institute	5,200	1
Kenai River	121,200	23
Transalaska Pipeline	117,300	23
Sitka's Russian Church/Dancers	101,600	20
Alyeska Ski Resort	96,200	18
Chugach State Park	96,200	18
Alaska State Museum	95,400	18
Columbia Glacier	92,700	18
Sitka National Historic Park	86,200	17
Prince William Sound	85,500	16
Valdez Pipeline Terminal	74,800	14
Alaskaland	74,000	14
Dog Mushing Attractions	74,000	14
Lake Hood Air Harbor	71,300	14
Kenai National Wildlife Refuge	71,300	14
Chena River Trips	68,600	13
Resurrection Bay	67,700	13

## Attractions Visited Statewide All Visitors – Summer 1989

Attraction	Number of Visitors To Attraction	Percent of Visitors Visiting Attraction
Gold Panning Dredges & Saloons	61,400	12
Matanuska Glacier	60,600	12
Potter Point State Game Refuge	53,500	10
St. Nicholas Russian Orthodox Church and Native Spirit Houses	49,900	10
Kachemak Bay	46,300	9
Chilkat Bald Eagle Preserve	43,100	8
College Fjord	39,200	8
Hatcher Pass Recreation Area	39,200	8
Kenai Fjords National Monument	39,200	8
Misty Fjords National Monument	36,900	7
Crow Creek Mine	32,100	6
Tracy Arm	30,800	6
Independence Mine State Historic Park	24,900	5
Hot Springs	16,000	3
Pipeline Haul Road	12,500	2
Alaska Historical and Transportation Museum	12,100	2
Nome - Gold Rush History	11,400	2
Kotzebue - Eskimo Culture	9,300	2
Prudhoe Bay Oil Fields	7,700	1
Kodiak Russian Orthodox Church	7,600	1
Eaglecrest Ski Area	6,300	1
Katmai National Park	5,500	1
Kodiak National Wildlife Refuge	4,200	1
Barrow	4,200	1
Fort Abercrombie	3,800	1
Aleutian Islands	3,800	1
Brooks Range	2,800	<1
Gates of the Arctic National Park	2,500	<1
Baranof Museum	2,500	<1
Arctic National Wildlife Refuge	2,000	<1
Wood River - Tikchik State Park	1,900	<1
Lake Clark National Park	500	<1
Round Island	300	<1%

Table II-B-8

## Attractions Visited By Region All Visitors – Summer 1989

	Number of Visitors To Region/Attraction	Percent of All Visitors To Alaska	Percent of All Visitors To Region
<b>Total Visitors</b>	<b>521,000</b>	<b>100%</b>	
<b>South Central</b>	<b>356,400</b>	<b>69%</b>	<b>100%</b>
<b>Anchorage Area</b>	<b>346,100</b>	<b>66</b>	<b>97</b>
Portage Glacier	238,800	46	67
Anchorage Museum of History & Art	149,700	29	42
Alyeska Ski Resort	96,200	18	27
Chugach State Park	96,200	18	27
Lake Hood Air Harbor	71,300	14	20
Potter Point State Game Refuge	53,500	10	15
St. Nicholas Russian Orthodox Church and Native Spirit Houses	49,900	10	14
Crow Creek Mine	32,100	6	9
<b>Kenai Peninsula</b>	<b>160,400</b>	<b>31</b>	<b>45</b>
Kenai River	121,200	23	34
Kenai National Wildlife Refuge	71,300	14	20
Resurrection Bay	67,700	13	19
Kachemak Bay	46,300	9	13
Kenai Fjords National Monument	39,200	8	11
<b>Prince William Sound Area</b>	<b>139,000</b>	<b>27</b>	<b>39</b>
Columbia Glacier	92,700	18	26
Prince William Sound	85,500	16	24
Valdez Pipeline Terminal	74,800	14	21
College Fjord	39,200	8	11
<b>Matanuska-Susitna Area</b>	<b>92,700</b>	<b>17</b>	<b>26</b>
Matanuska Glacier	60,600	12	17
Hatcher Pass Recreation Area	39,200	8	11
Independence Mine State Historic Park	24,900	5	7
Alaska Historical and Transportation Museum	12,100	2	3

Table II-B-8, Con't

## Attractions Visited By Region All Visitors - Summer 1989

	Number of Visitors To Region/Attraction	Percent of All Visitors To Alaska	Percent of All Visitors To Region
<b>Interior/Northern</b>	<b>180,500</b>	<b>35%</b>	<b>100%</b>
<b>Fairbanks Area</b>	<b>154,200</b>	<b>30</b>	<b>85</b>
University of Alaska - Fairbanks	124,500	24	69
University of Alaska Museum	97,500	19	54
Large Animal Research Station	45,100	9	25
Agricultural & Forestry (Experimental Station Farm)	28,900	6	16
Geophysical Institute	5,200	1	3
Transalaska Pipeline	117,300	23	65
Alaskaland	74,000	14	41
Dog Mushing Attractions	74,000	14	41
Chena River Trips	68,600	13	38
Gold Panning Dredges & Saloons	61,400	12	34
Hot Springs	16,000	3	9
<b>Other Northern Areas</b>	<b>41,500</b>	<b>8%</b>	<b>23%</b>
Pipeline Haul Road	12,500	2	7
Nome - Gold Rush History	11,400	2	6
Kotzebue - Eskimo Culture	9,300	2	5
Prudhoe Bay Oil Fields	7,700	1	4
Barrow	4,200	1	2
Brooks Range	2,800	<1	2
Gates of the Arctic National Park	2,500	<1	1
Arctic National Wildlife Refuge	2,000	<1	1

Table II-B-8, Con't

## Attractions Visited By Region All Visitors – Summer 1989

	Number of Visitors To Region/Attraction	Percent of All Visitors To Alaska	Percent of All Visitors To Region
<b>Southeast</b>	<b>307,700</b>	<b>60%</b>	<b>100%</b>
Inside Passage	227,700	44	74
Mendenhall Glacier	200,000	38	65
Glacier Bay	181,500	35	59
Ketchikan Totems	178,500	34	58
Skagway's Historic Gold Rush District	175,000	34	57
Sitka's Russian Church/Dancers	101,600	20	33
Alaska State Museum	95,400	18	31
Sitka National Historic Park	86,200	17	28
Chilkat Bald Eagle Preserve	43,100	8	14
Misty Fjords National Monument	36,900	7	12
Tracy Arm	30,800	6	10
Eaglecrest Ski Area	6,300	1	2
<b>Southwest</b>	<b>42,000</b>	<b>8%</b>	<b>100%</b>
Kodiak Russian Orthodox Church	7,600	1	18
Katmai National Park	5,500	1	13
Kodiak National Wildlife Refuge	4,200	1	10
Fort Abercrombie	3,800	1	9
Aleutian Islands	3,800	1	9
Baranof Museum	2,500	<1	6
Wood River - Tikchik State Park	1,900	<1	5
Lake Clark National Park	500	<1	1
Round Island	300	<1	1
<b>Denali/McKinley</b>	<b>175,200</b>	<b>34%</b>	<b>100%</b>

## Regional Use Patterns of Accommodations, Services, and Activities

Table II-B-9 shows the percent of visitors to each region who actually use each of the 32 trip features which they rated in the opinions section of this report.

The major form of lodging used in Southeast Alaska is cruiseship, while hotels/motels dominate in Southcentral and Interior. In the Southwest and Denali/McKinley regions, lodges and resorts are the most popular form of lodging. Bed and breakfasts are most widely used in Southcentral (9% use them). Interior and Denali visitors are most likely to use RV/campgrounds because the Highway market is important in those regions.

The instate transportation modes used by regional visitors show the geographic uniqueness of each region. Southerners are the most likely to use cruiseships and ferries in that largely roadless region. Southcentral visitors use everything but are the heaviest users of rental cars, and are likely to use train and motorcoach as well. Interior visitors are heavy users motorcoaches and the train and are the second best rental car market. Southwest visitors fly around that huge linear region and use other modes very little. Denali visitors are the heaviest users of motorcoaches and the train.

Restaurant/nightlife use is, of course, highest in the regions with major cities, lowest in the remote and largely rural Southwest.

When it comes to shopping, Southeast visitors do the most. The dominant cruiseship market comes ashore in Southeast's compact small cities and is greeted by heavy retail development right at the docks. Southcentral shopping visitors are close behind followed by Interior visitors. Visitors shop least in Southwest Alaska.

Use of Visitor Information Centers has increased in all regions except Southcentral. VICs are most used in Southeast (two-thirds of all visitors used them) and in the Denali region. The most significant gains in VIC use were recorded in the Interior and Southwest regions, evidence of improved VIC service and facilities. Visitors using VIC tend to be better informed and rate their Alaska trips higher than those not using VICs.

Southeast is where more visitors flightsee. In fact, Southeast visitors are more likely to take day cruises, city tours and other tours than are visitors to any other region. This is explained by the heavy marketing of day tours to the cruiseship market in the region. Large numbers of both Southcentral and Interior visitors take day cruises, city tours and other tours, but flightseeing is less common in these regions than in Southeast.

Southeast visitors are also the heaviest users of cultural attractions and museums. Southcentral and Interior visitors also frequent cultural attractions and museums. Some of the state's largest and most attractive centers are located in these regions.

Wildlife viewing is the most common activity in every region and is the main activity in the Denali region. Bird watching (mostly in the casual sense) is also common in all five regions. Rafting is most popular in Southeast and Denali. Hiking is universal but Southwest and Denali visitors do it most. Southwest is fishing country, with twice the participation of the next leading fishing region, Southcentral.

Table II-B-9

**Comparative Regional Use Patterns  
Accommodations, Services, and Activities  
All Visitors – Summer 1989  
(Percent of Regional Visitors Using)**

	South-east	South-central	Interior/ North	South-west	Denali/ McKinley
<b>Lodging</b>					
Hotel/Motel	21%	50%	48%	13%	21%
Resort/Lodge	3	6	1	38	35
Bed & Breakfast	3	9	2	3	1
RV/Campground	10	19	27	8	28
Cruiseship	49	7	-	-	-
Ferry	11	2	-	1	-
<b>Transportation</b>					
Motorcoach	3	21	31	3	57
Train	2	18	18	-	31
Air	8	9	10	58	2
Cruiseship	44	6	-	-	-
Ferry	16	5	-	4	-
Rental Car	8	23	15	8	13
Rental RV	-	4	1	-	3
<b>Restaurants/Nightlife</b>	55	71	65	47	56
<b>Shopping</b>	84	74	65	38	50
<b>Visitor Information Centers</b>	68	56	54	26	59
<b>Sightseeing</b>					
Flightseeing	28	10	7	13	6
Day Cruises	28	19	20	2	8
City Tours	47	23	26	4	2
Other Tours	35	22	18	24	54
<b>Cultural Attractions/ Museums</b>	60	44	44	24	17
<b>Activities</b>					
Canoeing/Kayaking	5	2	-	4	2
Rafting	10	4	-	4	14
Hiking	15	19	11	26	26
Freshwater Fishing	7	23	6	45	4
Saltwater Fishing	12	15	1	23	-
Wildlife Viewing	43	40	27	46	67
Bird Watching	31	26	19	27	39
Hunting	-	1	1	7	-
Dogsledding	-	1	3	-	1



## **C. Visitor Trip Planning**

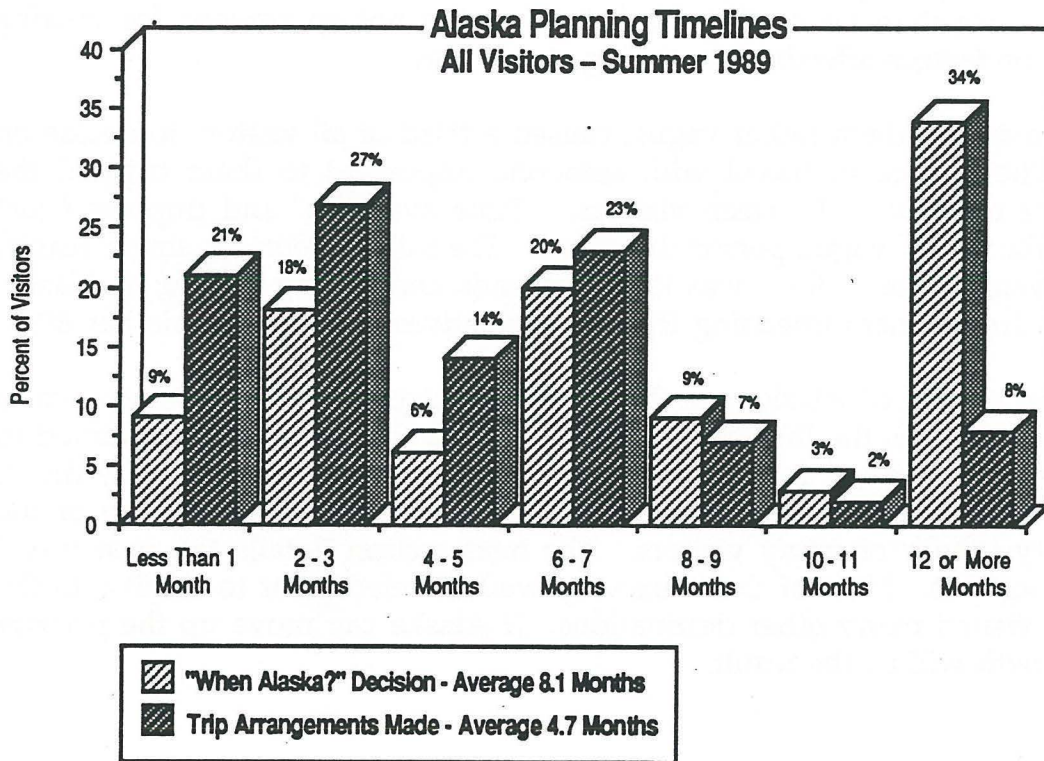
### **Alaska Trip Planning Timelines**

The average visitor decides to go to Alaska about eight months in advance and actually makes the travel arrangements five months ahead of time. But these averages mean little because the trip decision and travel arrangement timings are widely distributed.

The Alaska trip decision has definite peaks and valleys. A full third of the market decides to go to Alaska a year or more in advance, well ahead of the marketing season. For these, the trick is to find them to give them trip planning information because they are already sold on the destination. Those most likely to decide on Alaska a year or more in advance are cruise/tour visitors, the Highway and Ferry markets, Midwesterners and Europeans. For the other two-thirds of the market, the Alaska decision clearly peaks at six to seven months and then again at two to three months. Few visitors decide to go to Alaska 8 to 11 months in advance.

Actual trip arrangement times are more compressed. On average, four months lag between the Alaska decision and taking action on arrangements. Less than one in five Alaska visitors has made their arrangements prior to seven months before departure. Peak times are six to seven months in advance and shortly before departure. Nearly half the market makes their travel arrangements three months or less before departure.

Graph II-C-1



## **Alaska Trip Decision Criteria**

Visitors were asked why they chose to visit Alaska in 1989, and what factors caused them to go now rather than later. This question focused not on reasons for visiting Alaska, but rather on factors affecting the timing of the visit.

Personal reasons, many of them rather vague, caused a third of all visitors to decide on a trip in 1989. The chance to travel with someone important to them tripped the decision switch for one out of fourteen visitors. "Time available" and impulse ("just felt like it.") lead the list of vague personal reasons. The most important single reason for trip timing, given by one in four, was to visit friends and relatives living in Alaska. Recommendations from others (meaning friends or relatives) influenced another 8%.

The attractions and appeal of Alaska was one of the leading reasons of importance to come to the state, as well as the life-long ambition so often quoted, "Always wanted to (travel to Alaska)." The natural reply for the Alaska marketer is then, "So why didn't you come sooner if you always wanted to?" Alaska is clearly not on the top of the destination priority ladder of many visitors. The next section details the past travel history of Alaska visitors. Most of them are very well traveled prior to coming to the state, having first visited many other destinations. If Alaska can move up the priority ladder, market growth will be the result.

## **Choosing Alaska Over Other Destinations**

Most visitors decide on Alaska without considering competing destinations. However, about one in five agonizes over whether to visit Alaska or go to Europe, Canada, Hawaii, Mexico, or other destinations. About 82,000 visitors made a competitive decision in favor of Alaska in 1989. These visitors were asked why they chose Alaska over other destinations. Alaska friends and relatives, time, the appeal of Alaska, money, and cool weather carried most decisions in favor of Alaska.

Personal reasons weighed in Alaska's favor for about one-fourth of the undecideds, "time available" being the leading clincher in this group. Apparently, some perceive an Alaska trip as being more time consuming than the alternatives and they waited until time was available.

The influence of Alaska friends and relatives was a major reason for choosing Alaska, turning one in five toward Alaska. The attractions and appeal of Alaska won out for one in nine visitors, while price and discount considerations swayed one of twelve.

Alaska's main perception problem in the market, cool weather, was an asset for some. Six percent came to Alaska instead of going to a competing destination because they wanted cool weather.

Table II-C-1

## 1989 Alaska Trip Decision Criteria All Visitors – Summer 1989

	Main Reason for 1989 Alaska Trip	Reason for Alaska vs. Other Destinations Considered*
1. Personal Reasons	32%	25%
Chance to Travel with Friends and Relatives	7	3
Time Available	6	10
Just Felt Like It	5	3
Honeymoon/Anniversary	4	-
Finally Had Money	3	-
Travel Group	3	2
Getting Old/Failing Health	2	-
Gift	1	3
Retired Now	1	-
Never Been	1	4
Other	1	-
2. Visit Friends and Relatives	24	20
3. Attractions/Appeal of Alaska	12	11
Fishing	7	5
Natural Beauty	3	5
Wildlife	2	1
Other	1	5
4. Long Time Desire	11	-
5. Recommended By Others	8	2
6. Business	6	11
7. Advertising Promotion	4	-
8. Price/Discount Considerations	4	8
Air or Cruise Reduced Price	2	2
Air Mileage Available	1	-
9. Wanted to Cruise	3	1
10. Trip Extension	2	1
11. Curiosity	2	-
12. Cool Weather	1	6
13. Visit all 50 States	1	5
14. Other	3	18

\* Of those who chose Alaska vs. other destinations considered.

## Competing with Specific Destinations

Family issues are the leading reason why Alaska is chosen over Europe, Hawaii and California. Family issues include the chance to travel with family members, visiting relatives during the trip and freedom to travel after children leave home, to name a few. But cost is a better sales aid when luring prospects away from Australia/New Zealand, Mexico and Canada.

Europe is Alaska's leading competitor, followed by Canada, Hawaii and Mexico. Table II-C-2 lists the top ten competitors which Alaska most often wins over and the main reasons for choosing Alaska over each of them.

Surprisingly, cost is mentioned as a reason for choosing Alaska over four of the top five competitors. This is a new trend and shows Alaska is becoming price competitive. The state has long suffered from the perception that prices are high, therefore travel to the state must be costly.

Table II-C-2

## Why Visitors Chose Alaska Over a Considered Destination All Visitors – Summer 1989

Considered Destination	Reason for Choosing Alaska
1. Europe	Family Related, Previous Visit, Trip Timing, Personal Preference, Safer than Overseas, Cost
2. Canada	Business, Cost, Fishing, Family Related
3. Hawaii	Family Related, Trip Timing, Special Fares, Natural Beauty
4. Mexico	Cost, Family Related, Fishing, Cool Weather
5. Australia/New Zealand	Cost, Trip Timing, Travel With Friends, Family Related
6. California	Family Related, Never Been, Cool Weather
7. Caribbean	Natural Beauty, Cool Weather, Cost
8. Pacific Northwest	Business, Never Been, Travel With Friends
9. South Atlantic States	Trip Timing, Family Related
10. New England	Business, Travel With Friends

## Travel History and Future Preferences of Alaska Visitors

Visitors were asked to provide a five year travel history as well as where they prefer to travel in the future. Detailed competitive destination data follows in Table II-C-3.

More Alaska visitors have traveled to Europe in the past five years than to any other overseas or domestic destination, except Hawaii, which is in a tie with Europe for most Alaska visitors in the past five years (26%). More Alaska visitors also prefer Europe as their next travel destination over any other choice except Alaska.

Visitors were asked for both their most preferred (where do you want to go?) and their most likely (where will you really go?) destination. Alaska edged out Europe as the most preferred (17% vs 16% for Europe) and most probable (14% vs 11%) next travel destination. The destination with the largest discrepancy between preference and likelihood of visiting was Australia/New Zealand. Nine percent want to go there next but barely 2% think they really will.

Alaska's major past competitors are the same ones listed in the previous competitive choice analysis - Europe, Canada, Hawaii, Mexico and others shown on the following page. Alaska's future major competitors are, of course, the same ones however Europe, Hawaii, Australia/New Zealand and Canada are highest on the wish lists of Alaska visitors.

Since 1985, Alaska visitors travel less to Europe (26% did in past five years, compared to 45% in the five years before 1985). Cost, is more and more in Alaska's favor, as is a latent issue, security. Hawaii maintained its popularity but both Mexico and Canada show slight losses among Alaska visitors.

Table II-C-3

## Travel History and Future Preference of Alaska Visitors All Visitors – Summer 1989

	Last 2,000+ Miles	Past Five Years	Others Considered for 1989	Preferred Next Vacation	Probable Next Vacation
<b>Europe</b>	<b>15%</b>	<b>26%</b>	<b>3%</b>	<b>16%</b>	<b>11%</b>
Great Britain	4	10	<1	3	2
West Germany	2	4	<1	1	1
<b>Pacific Coast States</b>	<b>17</b>	<b>42</b>	<b>4</b>	<b>11</b>	<b>11</b>
Hawaii	9	26	3	9	6
California	6	22	1	2	3
Washington/Oregon	1	13	<1	<1	1
<b>Canada</b>	<b>6</b>	<b>22</b>	<b>3</b>	<b>5</b>	<b>5</b>
British Columbia	1	6	1	<1	1
<b>South Atlantic States</b>	<b>6</b>	<b>26</b>	<b>1</b>	<b>3</b>	<b>6</b>
Florida	4	19	<1	2	4
Washington, D.C.	1	4	<1	1	1
<b>Mexico</b>	<b>5</b>	<b>13</b>	<b>2</b>	<b>3</b>	<b>3</b>
<b>Mountain States</b>	<b>4</b>	<b>23</b>	<b>2</b>	<b>4</b>	<b>8</b>
Arizona	2	7	<1	2	3
Nevada	1	8	<1	<1	1
<b>Caribbean</b>	<b>3</b>	<b>10</b>	<b>1</b>	<b>1</b>	<b>3</b>
<b>New England</b>	<b>2</b>	<b>10</b>	<b>1</b>	<b>2</b>	<b>2</b>
Massachusetts	1	3	-	<1	<1
<b>Midwest States</b>	<b>2</b>	<b>12</b>	<b>&lt;1</b>	<b>&lt;1</b>	<b>1</b>
<b>Alaska</b>	<b>4</b>	<b>7</b>	<b>-</b>	<b>17</b>	<b>14</b>
<b>Australia/New Zealand</b>	<b>2</b>	<b>6</b>	<b>2</b>	<b>9</b>	<b>2</b>
<b>China/Hong Kong/Taiwan</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Japan/Korea</b>	<b>1</b>	<b>3</b>	<b>&lt;1</b>	<b>&lt;1</b>	<b>&lt;1</b>
<b>India/S.E. Asia</b>	<b>1</b>	<b>3</b>	<b>&lt;1</b>	<b>1</b>	<b>&lt;1</b>
<b>South Pacific</b>	<b>1</b>	<b>2</b>	<b>&lt;1</b>	<b>&lt;1</b>	<b>&lt;1</b>



## Trip Information Sources

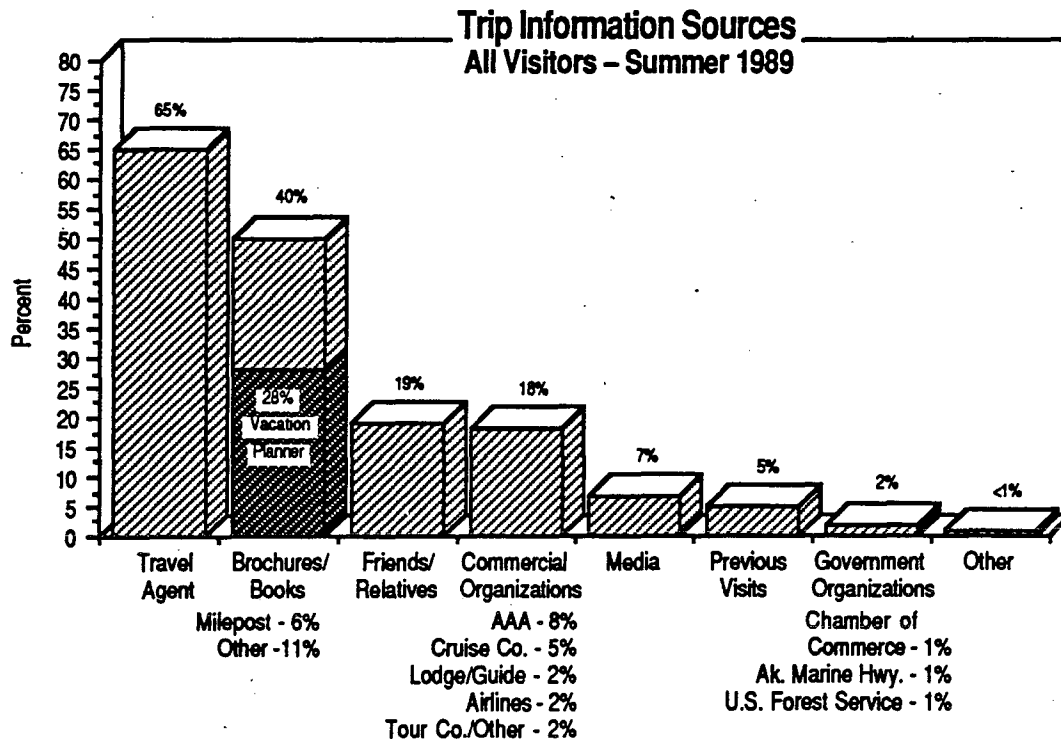
Where do visitors really get their information for planning an Alaska trip? Six survey questions were devoted to this issue and some results are surprising. The responses shown in Graph II-C-2 were answers to an open-ended question asking the visitors to remember, unprompted, what sources they used. Therefore, actual use is likely to be slightly higher.

Travel agents are a source of information for nearly two thirds of the market. In second place and well ahead of other sources is the *State of Alaska Official Vacation Planner*, used by 28% of all visitors. Brochures and books were used by 40% of all visitors. Second to the Planner in this category is the leading guidebook used by 6% of the market.

Friends and relatives were named by one of five visitors, as were commercial organizations such as AAA (8%) and cruise companies (5%). Media was mentioned as a source of trip information and previous Alaska visits were also important. Only a small proportion of visitors recall getting their information from government organizations such as the U.S. Forest Service (1%) or a Chamber of Commerce (1%).

Visitors are using more sources for trip planning than in 1985 (1.25 sources vs. 1.57 in 1989). Three sources in particular have become more important. The most dramatic increase is in the use of the *State of Alaska Official Vacation Planner*, nearly tripling from 11% to 28% of all visitors. Travel agent use also increased from 50% to 65%. Finally, the role of media as an information source has more than doubled and is recalled by 7% (up from 3% in 1985) of all visitors.

Graph II-C-2



## **Purchase of Alaska Trip Planning Material**

The majority of visitors (56%) spend money to buy books, maps and other materials to assist in their trip planning. Clearly, commercial information sources, such as guide books are important. The biggest spenders in Alaska (visitors from Germany/Switzerland/Austria) are the most likely to buy trip planning material (86% do). In order of dollars spent on trip planning information/materials: The Japan, European, Highway, Ferry, Interior, Denali, Inde-Package, and Cruise/Tour visitors. More than two-thirds of all these markets buy additional trip planning information. All of these groups spend much more than average in Alaska.

## **Requesting the State of Alaska Official Vacation Planner**

About three in ten Alaska visitors requested the Planner and its use is found among all visitor groups. Even one fourth of all package visitors, who rely mostly on travel agents, use the Planner. Most likely to use the Planner are Highway and Ferry markets (nearly half of them do), visitors to the Interior and Denali regions (over 40%), Inde-Package (39%) and Independent (37%) visitors, and Midwesterners (36%). Twenty percent of visitors from Great Britain and 11% of Germans/Swiss/Austrians also use the Planner.

## **Receipt of Unsolicited Brochures on Alaska**

Only 19% of all visitors recalled receiving unsolicited Alaska brochures but those who did were deluged with an average of over 13 of them. Clearly, the industry's marketing efforts are concentrated on only a small portion of the market, but competition for those appears intense. The fact that four of five receive nothing is a marketing challenge for Alaska visitor businesses. Most likely to receive unsolicited brochures are the Japanese, Cruise/Tour and Ferry markets.

## **Readership of Special Newspaper Travel Sections on Alaska**

Nearly two-thirds of all visitors they read special newspaper travel sections, making newspapers a key media for both sales and information. At least half of all market groups read special travel sections on Alaska, including 47% of all Overseas visitors. Travel sections had the most impact on the Cruiseship market, particularly Air/Cruise visitors, and on visitors from the East.

## **Frequent Flyer Program Use**

Frequent flyer program mileage is used by someone in three out of ten Domestic Air user parties. Of all visitor parties, 20% had someone in their traveling party using a frequent flyer mileage ticket at some point in their Alaska trip. Most visitor groups made extensive use of frequent flyer programs. Business-related visitors and the Independent markets used them more than average while Package markets used them less. Oddly, Domestic Air visitor parties from Florida (79%) were by far the heaviest users of the programs.

Clearly, a significant proportion of the market wants to cut the cost of getting to and from Alaska. Access cost is a major barrier to Alaska visitor prospects. Frequent flyer programs most certainly expand the market to a destination where airline price competition has not been common.

## **Impacts of Exxon Valdez Oil Spill on Trip Planning**

The oil spill affected the Alaska trip planning of one in six visitors. Half of these avoided the spill area. Smaller percentages said they had difficulty finding accommodations in the spill area, didn't go fishing as intended, came to help clean up, or had business related to the spill. Those most affected by the spill, in order, were business visitors, Germans/ Swiss/Austrians, Vacation/Pleasure visitors, Japanese, and the Inde-Package market. The package market was least affected but still, one in nine changed some aspect of their trip.

Of those who did change their travel plans, Germans/Swiss/Austrians (76%), VFRs (89%), and the Vacation/Pleasure market (69%) were most likely to avoid the spill area, including both Southcentral and Southwest Alaska.

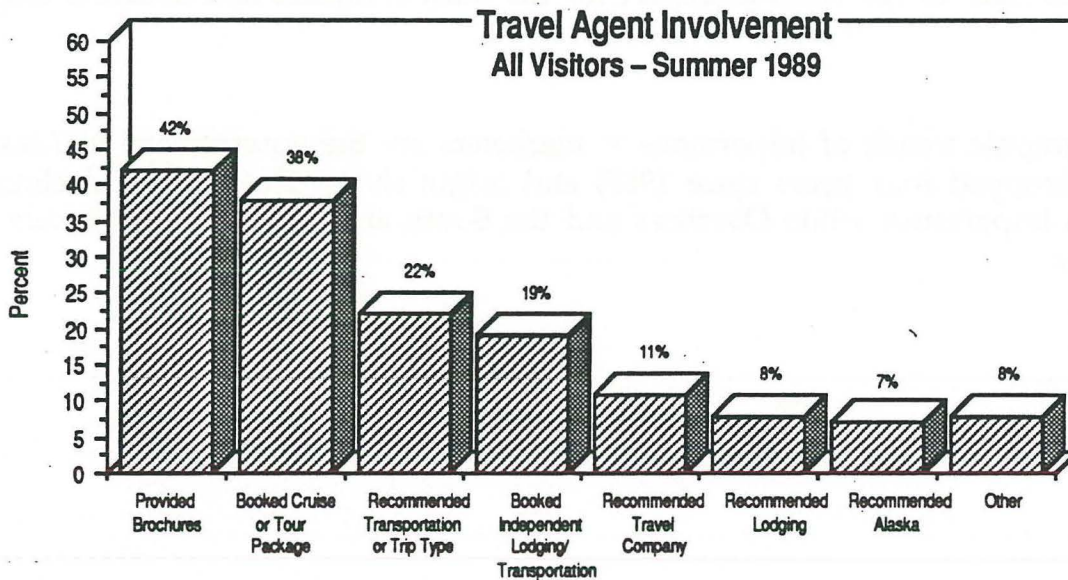
## Travel Agent Involvement

Travel agents are very important to the marketing of Alaska package tours and somewhat important to assisting the Independent market with their travel arrangements. Travel agents provide a variety of services to Alaska visitors, but the two most common by far are providing brochures (42% of visitors get brochures from an agent) and actual booking of cruises or tours (38% book with an agent). Travel agents are also important for recommending transportation mode or type of trip, which they do in one out of four cases. They also recommend a travel company and lodging.

A significant share of the Independent market also uses agents, for booking independent lodging and transportation. Almost all package visitors using agents booked cruises and tours with them. Only ten percent of the package market but over half of the Independent market didn't use a travel agent at all.

Most visitors appear to have their mind set on Alaska because only 7% of the market had an agent recommend an Alaska trip. However, this is nearly twice as common as it was four years ago. Other changes over that time include modest increases in the proportion of the market booking cruises and tours through an agent and in providing brochures. Use of agents is increasing, due at least in part to a doubling of the number of agents in the past decade.

Graph II-C-3



## **D. Visitor Demographics**

### **Education**

Alaska visitors are very well educated – nearly half are college graduates. Another one-fourth of all visitors have had some college but did not graduate.

### **Household Income**

Alaska visitors are moderately well-to-do with average household incomes approaching \$60,000. One in four makes over \$75,000.

### **Age & Gender**

The average Alaska visitor is 49 years old and one of four is 65 years old, twice the proportion in the U.S. population. The number of males and females is almost even.

### **Employment**

Over half of the state's visitors are employed at the time of their visit and a third are retired. The balance of 15% are visitors not in the labor force such as children and housepersons.

### **Origin**

The West is the most important producer of Alaska visitors, followed by the Midwest, South and East. These origin data differ slightly from the previous Alaska Visitor Arrivals, Summer 1989, report since they are the results of a slightly different survey. Readers should refer to the Arrivals report for the most complete and accurate origin data.

### **Reader Note**

Visitor demographic trends of importance to marketers are the younger age of Alaska visitors (age dropped four years since 1985) and origin shift. The West is declining moderately in importance while Overseas and the South are gaining as producers of Alaska visitors.

Table II-D-1

## Demographics All Visitors - Summer 1989

	Percent of Visitors
<b>Visitor Education</b>	
Not High School Graduates	5%
High School Graduates	25
1 - 3 Years College	22
College Graduate	22
Attended or Completed Graduate School	26
<b>Visitor Household Income (Average - \$56,800)</b>	
Under \$25,000	16%
\$25,000 - \$34,999	18
\$35,000 - \$49,999	21
\$50,000 - \$74,999	19
\$75,000 - \$99,999	11
\$100,000 and Over	14
<b>Visitor Age (Average - 49 Years Old)</b>	
Under 18 Years	7%
18 - 24 Years	4
25 - 34 Years	10
35 - 44 Years	13
45 - 54 Years	18
55 - 64 Years	22
65 - 74 Years	20
75 + Years	5
<b>Visitor Gender</b>	
Male	51%
Female	49%
<b>Visitor Employment</b>	
Employed	52%
Retired	33
Other	15
<b>Visitor Origin</b>	
West	38%
California	15
Washington	7
Midwest	20
South	16
East	12
Canada	8
Overseas	5
Germany/Switzerland/Austria	2
Japan	1



## **Chapter III. Regional Visitor Profiles**

**A. Visitor Opinions**

**B. Visitor Travel Patterns**

**C. Visitor Travel Planning by  
Regional Visitors**

**D. Demographics**



## Chapter III. Regional Visitor Profiles

### A. Visitor Opinions

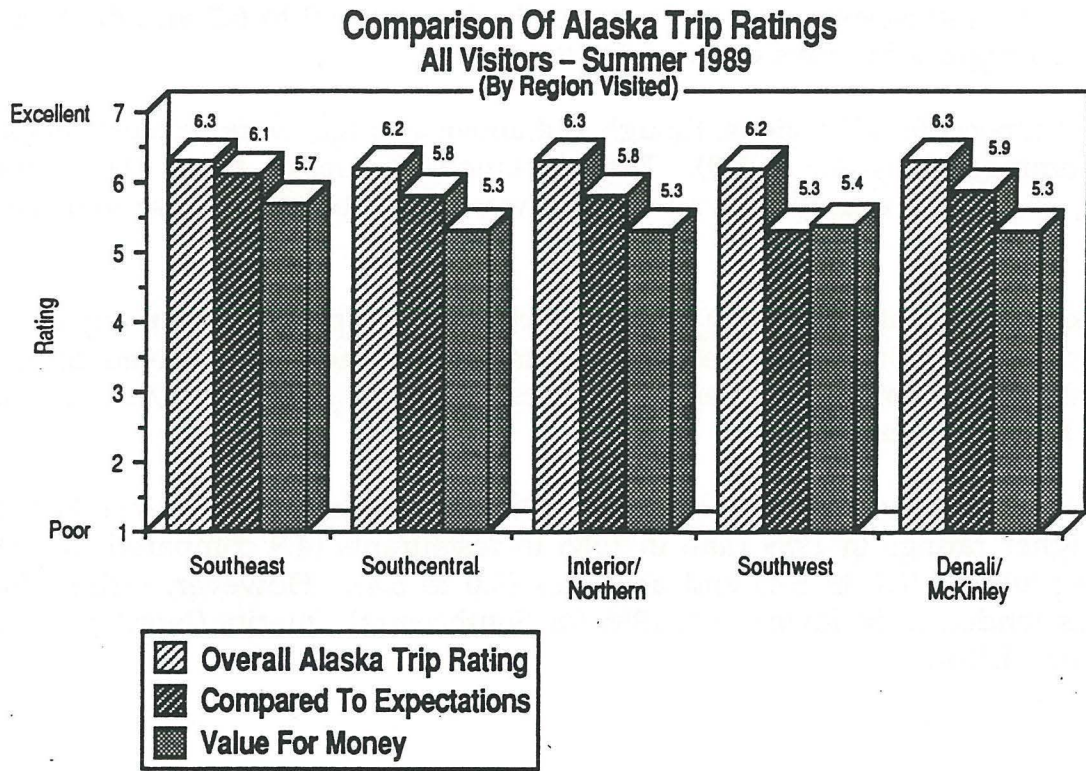
#### Overall Alaska Trip Ratings

Visitors to every region were very pleased with their overall Alaska experience. Southeast, Interior/Northern and Denali/McKinley were the highest rated regions, with each receiving a 6.3 average rating (on a "1" poor to "7" excellent scale). Southcentral and Southwest followed closely with a 6.2 average rating each. Overall satisfaction ratings for Interior/Northern, Denali/McKinley and Southcentral showed improvement over their already high 1985 ratings (6.1, 6.2 and 6.1, respectively). The overall satisfaction rating for Southeast remained the same as 1985, while Southwest's rating slipped slightly from 6.3 to 6.2.

In all regions, visitors trip experience exceeded their expectations. The highest ratings were found among Southeast visitors (6.1), and the lowest ratings among Southwest visitors (5.3). In all regions, except Southwest, visitor expectation ratings improved slightly over 1985 ratings. In other words, Alaska is doing a slightly better job of meeting or exceeding expectations of Alaska visitors.

However, value for the money ratings for all regions are generally much lower than the ratings for the overall Alaska experience, though still better than average. Southeast visitors tend to feel they received a higher value for the money than any other region's visitors. This may be due in part to the high number of cruise visitors to that region, whose value for the money ratings tend to be higher than other groups.

Only slight differences exist when comparing value for the money ratings from 1985 to 1989. Southeast's value for the money has improved (5.7 to 6.1), Southwest's remained the same and the remaining regions were slightly lower (5.4 in 1985 compared to 5.3 in 1990). Still, these lower value ratings did not seem to negatively affect the overall trip experience for any region.



## Value for the Money Ratings

Among the aspects of visitor's overall Alaska trip, the people (friendliness/helpfulness) and the sightseeing/attractions rated the highest (6.0 to 6.2 and 6.0 to 6.1 respectively) in all regions in terms of value for the money.

The lowest rated aspects for all regions, though still above average, were restaurants (4.9 to 5.3) and accommodations (4.9 to 5.0). Transportation (to Alaska, from Alaska and within Alaska), as well as activities in all regions were rated between these high and low groupings.

Southeast Alaska visitors rated virtually every aspect of their trip higher than any other regional visitor group. Only activities and sightseeing/attractions received higher ratings by Southwest visitors. Southcentral visitors also rated sightseeing/attractions slightly higher than Southeast visitors.

Several ratings have improved significantly since 1985. For example, Southwest Alaska visitors gave higher ratings in 1989 than in 1985 to restaurants (4.9 compared to 4.4), friendliness/helpfulness (6.0 to 5.4) and activities (6.0 to 5.4). However, ratings for accommodations tended to be lower than 1985 for Southcentral, Interior/Northern and Denali/McKinley visitors.

Tables III-A-1

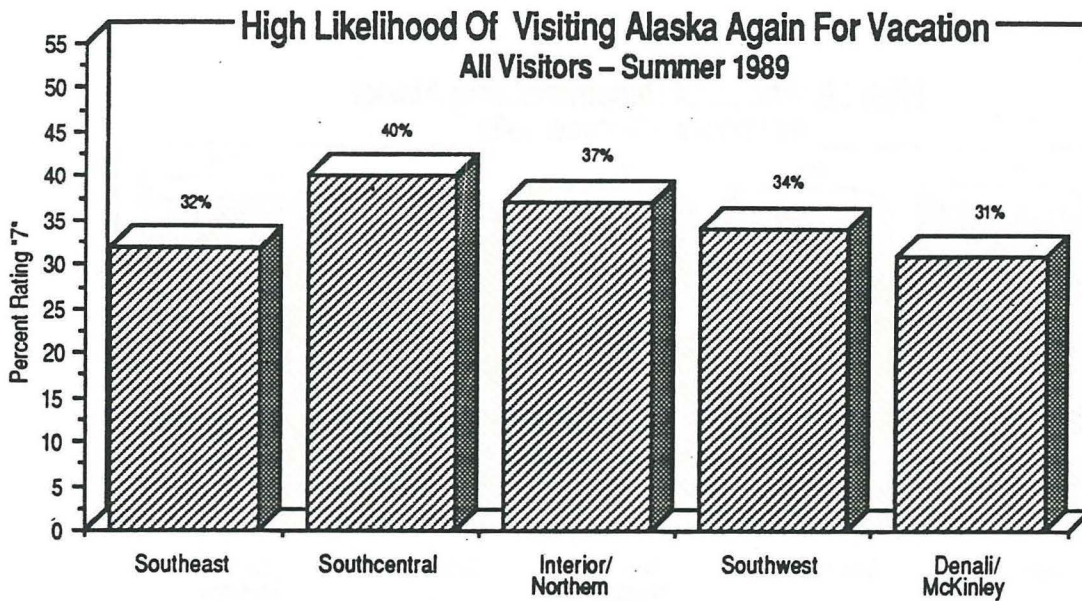
### Value For Money Ratings By Region Visited All Visitors - Summer 1989 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Accommodations	5.5	5.0	5.0	4.9	4.9
Transportation To Alaska	5.7	5.4	5.5	5.5	5.4
Transportation From Alaska	5.6	5.3	5.5	5.3	5.5
Transportation Within Alaska	5.7	5.4	5.5	5.0	5.5
Sightseeing/Attractions	6.0	6.1	6.0	6.1	6.0
Activities	5.6	5.7	5.5	6.0	5.5
Restaurants	5.3	5.1	4.9	4.9	4.9
Friendliness/Helpfulness	6.3	6.2	6.2	6.0	6.2

## Likelihood of Visiting Alaska Again for Vacation

Nearly one-third or more of each region's visitors indicated they were very likely – a "7" rating on a one to seven scale – to visit Alaska for vacation again in the next five years. This rating is highest among visitors to Southcentral Alaska, where four of ten ranked their likelihood of visiting Alaska again a "7".

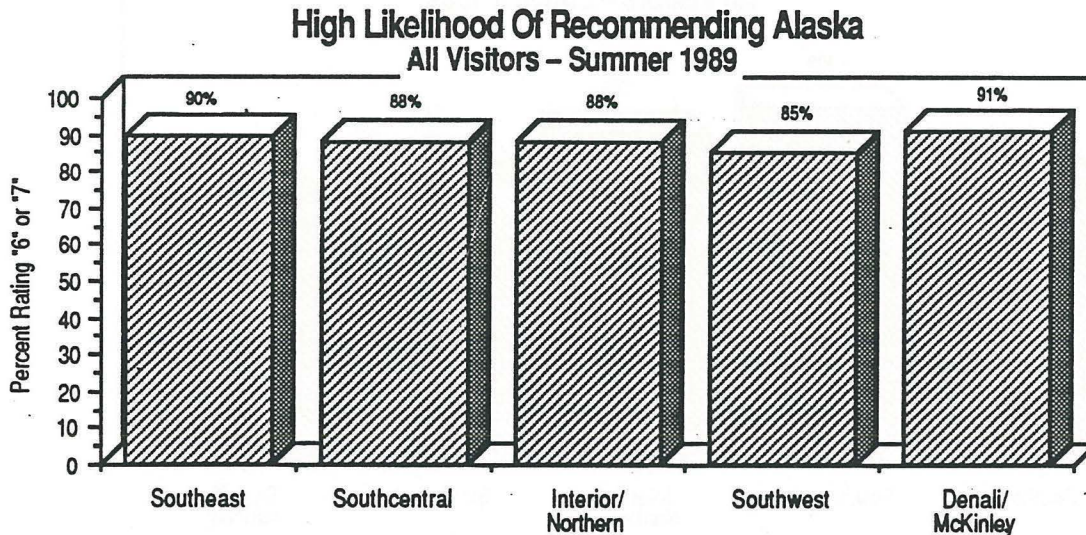
Graph III-A-2



## Likelihood of Recommending Alaska as a Vacation Place

Visitors to all regions have a high likelihood of recommending Alaska as a place to vacation. In fact, when asked if they had recommended Alaska to anyone as a result of their visit, 94% of visitors said "yes". Ninety-four percent or more of the visitors to Southeast, Southcentral, Interior/Northern and Denali/McKinley indicated they had already recommended Alaska. Among visitors to Southwest 89% had recommended a visit, still a very positive indication of strong word-of-mouth advertising.

Graph III-A-3



## Misconceptions About Alaska

Visitors to all regions had misconceptions about the weather which were cleared up by their Alaska trip. Visitors to Southeast were most concerned about the weather. Over one-third indicated the weather was better than what they expected. Apparently, visitors to this region were prepared for worse weather than they experienced, thanks to a very sunny summer in Southeast Alaska. Still, the weather was better than expected for nearly one in four visitors to the remaining regions.

Alaska was different than expected for over one in five visitors to Denali/McKinley. The size of the state and breaking Eskimo stereotypes were the leading reasons visitors to all regions indicated Alaska was different than expected.

One in ten visitors to Southcentral, Interior/Northern and Denali indicated Alaska was worse than expected. It appears the appeal of Alaska and its attractions did not live up to the expectations of some of these region's visitors.

Table III-A-2

**Biggest Misconception Cleared Up By Visit to Alaska  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
<b>Better Than Expected</b>	<b>52%</b>	<b>44%</b>	<b>46%</b>	<b>41%</b>	<b>45</b>
Weather	35	27	26	26	23
Appeal of Alaska/Attractions	8	8	6	2	9
Roads	4	5	10	11	8
Prices/Cost	2	2	1	–	3
Other	28	29	26	40	22
<b>Different Than Expected</b>	<b>13%</b>	<b>16%</b>	<b>18%</b>	<b>12%</b>	<b>22%</b>
<b>Worse Than Expected</b>	<b>7%</b>	<b>11%</b>	<b>11%</b>	<b>6%</b>	<b>10%</b>
Appeal of Alaska/Attractions	5	6	7	–	8
Prices/Cost	–	2	1	–	1
Facilities/Transportation	–	2	1	5	–
Roads	–	1	1	2	1
Weather	1	–	–	–	–
Other	1	–	1	–	1

## B. Visitor Travel Patterns

### Entry and Exit Modes by Region Visited

The most common mode used for entering and exiting Alaska for all regions, except Southeast is Domestic Air. In Southeast, Cruiseship is the most often used mode for entering or exiting the state. Southwest depends heavily on visitors entering the state by Domestic Air, as does Southcentral. In addition to Domestic Air, the Highway is an important entry and exit mode for visitors to Interior/Northern and Denali/McKinley, with approximately one in four visitors using the Highway. Mode mixing, that is visitors changing modes, is evident between the Highway and Ferry, particularly in Southeast, Interior/Northern and Denali/McKinley. Many Highway entries use the Ferry to exit the state and vice-versa.

Table III-B-1

**Entry Mode Into Alaska  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Domestic Air	31%	62%	47%	86%	49%
Cruiseship	46	15	14	1	17
Highway/Private Vehicle	8	14	29	2	24
Ferry	15	4	8	2	7
International Air	1	4	2	9	3

Table III-B-2

**Exit Mode From Alaska  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Domestic Air	34%	63%	47%	80%	51%
Cruiseship	43	13	14	3	15
Highway /Private Vehicle	13	13	26	2	21
Ferry	9	6	11	–	10
International Air	1	5	3	15	4

## Total Mode Market by Region Visited

A more in-depth assessment of the importance of each mode is the following analysis of mode market size by region. The mode market size is defined as the total number of visitors using a particular mode for either entry, exit or both. For example, in Southeast Alaska, 148,400 visitors used Domestic Air. This figure represents a total of those entering Alaska by Domestic Air, those exiting Alaska by Domestic Air and those using Domestic Air to both enter and exit the state.

Domestic Air is the dominant transportation type in four out of five regions. However, Cruiseship, Highway, International Air and Ferry are important to most regions as well. Southwest Alaska is an exception, drawing over 90% of its visitors from the domestic and international air markets.

This information can be used by marketers in different regions to reach visitors using the various modes. For instance, 43,300 ferry users make their way to Southcentral Alaska at some point during their trip. Businesses in Southcentral Alaska can reach this primarily independent market through distribution channels important to ferry users (i.e. the Alaska Vacation Planner). Marketers need to study these mode use patterns to fully understand how visitors to their region are accessing the state.

Table III-B-3

### Mode Use By Region Visited All Visitors – Summer 1989 (Number of Each Region's Visitors)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Domestic Air	148,400	274,900	114,200	37,700	118,400
Cruiseship	184,600	92,900	50,100	1,800	55,500
Highway/Private Vehicle	57,500	62,000	63,200	900	50,500
Ferry	42,900	43,400	31,600	700	27,900
International Air	4,600	21,800	6,100	6,700	8,000



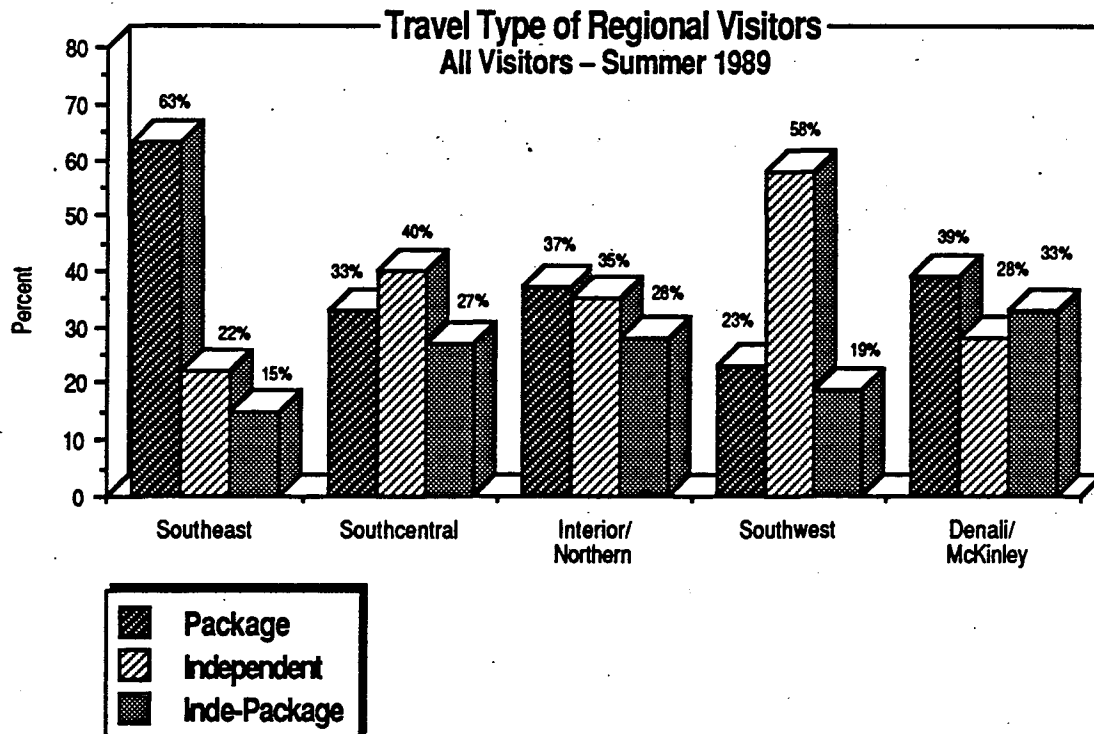
## Visitor Travel Type by Region Visited

Three travel types are defined in this study: Package visitors, Independents (not traveling on a prearranged package) and Inde-Package (Independents who purchase sightseeing tours once they arrive in Alaska).

Each region has its own unique mix of visitor types. Southeast Alaska is predominantly a packaged tour market, although just over one-third are independent visitors (either Independent or Inde-Package). In fact, since 1985, Independents have increased from 30% to 37% of the total visitors to Southeast, evidence of successful regional marketing efforts to the Independent visitor.

Visitors to Southcentral, Interior/Northern, Southwest and Denali/McKinley are primarily either Independent or Inde-Package. However, since 1985, package visitors have increased somewhat in Southcentral (from 30% to 33% of the market), Interior/Northern (from 31% to 37% of the market) and Denali/McKinley (from 37% to 39% of the market).

Graph III-B-1



## Length of Stay by Region Visited

Length of stay in Alaska and in each region visited varies significantly among the regional groups. Those visiting Alaska's Interior/Northern region stay the longest, at 14 nights, but only spend one quarter of their visit in that region. On the other hand, visitors to Southeast Alaska spend the least amount of time in the state (10 nights) but spend over half of their stay in that region. Visitors to Southcentral and Southwest stay in Alaska the same amount of time and stay in those regions for over half of their trip. Visitors to Denali/McKinley spend nearly 14 nights in the state, but less than two nights on average in the Denali/McKinley area.

Since 1985, length of stay in Alaska and each region has declined for visitors, reflecting the national trend toward shorter vacations. For Southeast Alaska visitors, length of stay in the state has dropped by a full night (10.8 to 9.9), yet length of stay in the region has slipped only slightly (5.6 to 5.4). Southcentral visitors also are staying a day less (13.8 to 12.6) but only cutting their visit in the region short by half a day (8.0 to 7.4). Visitors to the Interior/Northern region are also staying in the state less (14.9 to 14.3 nights), and shortening their regional stay by nearly a night (4.1 to 3.4 nights). Denali/McKinley visitors stay one and a half days less than in 1985, but only slightly less in the region (1.9 to 1.6 nights).

However, the largest shift in length of stay occurs among visitors to Southwest Alaska. These visitors have shortened their length of stay in the state by over six nights (18.9 to 12.6 nights), yet have increased their stay in the Southwest region by nearly two nights (from 4.9 to 6.8 nights). Given the shorter length of stay of Southwest visitors since 1985 and the more time they spend in the Southwest region, these visitors' apparently are not visiting as many other parts of the state as they once did.

Table III-B-4

### Length Of Stay By Region Visited All Visitors - Summer 1989

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Length of Stay In Alaska	9.9	12.6	14.3	12.6	13.5
Length of Stay In Region	5.4	7.4	3.4	6.8	1.6
Percent of Alaska Trip Time In Region	55%	59%	24%	54%	12%

## Length of Stay by Community

Table III-B-5 shows the average number of nights spent in each community by visitors to each region. For example, the typical visitor to Southeast spends 5.4 nights in the region, with 2.8 nights spent at sea, either on a cruiseship or ferry. Ketchikan, Juneau and Skagway are also major overnight stops for visitors.

Visitors to Southcentral Alaska spend over half their nights in Anchorage - 4.0 of 7.4 nights in the region. Visitors to Southcentral also overnight at sea, and on the Kenai Peninsula. Interior/Northern visitors also spend more than half their time in the region's largest city, Fairbanks. Southwest visitors spend little time in the towns (Kodiak, Bethel, King Salmon) and spend more of their time in more remote locations, a reflection of the fishing lodge industry which has made Southwest famous.

Table III-B-5

## Lodging Type Use All Visitors – Summer 1989

(Average Number of Nights Spent by Regional Visitors In Region and Community)

	Average # of Nights	% of Visitors
<b>Southeast</b>	<b>5.4</b>	<b>100%</b>
At Sea	2.8	52
Ketchikan	1.0	19
Wrangell	-	-
Petersburg	0.1	2
Sitka	0.1	2
Juneau	0.6	11
Haines	0.2	4
Skagway	0.5	9
Glacier Bay	-	-
Other Southeast Locations	0.1	2
<b>Southcentral</b>	<b>7.4</b>	<b>100%</b>
At Sea	0.9	12
Anchorage	4.0	54
Homer	0.6	8
Kenai/Soldotna	0.6	8
Seward	0.3	4
Other Kenai Peninsula Communities	0.2	3
Wasilla	0.1	1
Palmer	0.2	3
Valdez/Prince William Sound	0.2	3
Cordova	-	-
Other Southcentral Locations	0.3	4
<b>Interior/Northern</b>	<b>3.4</b>	<b>100%</b>
Fairbanks	2.1	62
Tok	0.5	15
Kotzebue	-	-
Nome	0.2	6
Barrow	-	-
Prudhoe Bay	0.1	3
Other Interior Locations	0.4	12
<b>Southwest</b>	<b>6.8</b>	<b>100%</b>
At Sea	-	-
Bethel	0.3	4
Dillingham	-	-
Kodiak	1.2	18
Katmai	0.4	6
King Salmon	1.1	16
Aleutians	1.3	19
Lodges:		
Alaska Peninsula	0.1	1
Bristol Bay	0.5	7
Lake Clark/Iliamna	0.3	4
Other Southwest Locations	1.6	24
<b>Denali/McKinley</b>	<b>1.6</b>	<b>100%</b>

## Lodging Type by Region Visited

### Lodging Type Use

Lodging type data in this section describes lodging use by visitors in each region. For example, among visitors to Southeast Alaska, 22% stayed in a hotel or motel in the region. The next section will present lodging type use and length of stay by visitors to communities.

Each region of the state has unique lodging type use patterns. Hotels/motels are used more often in the Southcentral and Interior/Northern regions than in any other region of the state. Resorts and lodges are the most used lodging type in Southwest and in Denali/McKinley. Bed & Breakfast accommodations, a growing trend in lodging throughout the state, now capture a small share of the market in all regions. RV/campground facilities are also used in all regions. However, a higher proportion of Interior/Northern and Denali/McKinley visitors use these facilities than visitors to other regions.

Cruiseships are the predominant lodging type in Southeast Alaska, and are also important in Southcentral where one in five visitors to Southcentral uses a cruiseship for lodging. One in eight visitors to Southeast overnights on the ferry.

Private homes are used by nearly three in ten visitors to Southcentral and Southwest Alaska, but considerably less in other regions.

Table III-B-6

### Lodging Type Use By Region Visited All Visitors – Summer 1989 (Percent of Each Region's Visitors)

Lodging Type	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Hotel/Motel	22%	56%	62%	12%	25%
Resort/Lodge	3	6	1	41	41
Bed & Breakfast	3	8	3	7	1
Private Home	8	28	9	29	1
RV/Campground	10	23	30	13	35
Cruiseship	62	21	-	-	-
Ferry	15	1	-	1	-
Other	2	4	1	14	1

## Length of Stay by Lodging Type

Table III-B-7 provides regional information regarding the average number of nights stayed by users of each lodging type. For example, visitors to Southeast Alaska who used a hotel or motel (22% from Table III-B-6) stayed on average 2.6 nights.

For hotel/motels the average length of stay is similar in all regions except Denali/McKinley, which tends to be shorter by one night. Resort/lodge use varies considerably by region, with Southwest visitors staying longer in this type of lodging. Average bed and breakfast use is similar to hotel/motel use in each region averaging two to three nights. Except for visitors who use private homes for lodging in each region, those who use RV/campground facilities stay the longest in every region except Interior/Northern.

Cruiseship users spend on average four nights in Southeast and two to three nights in Southcentral. Users of the ferry in Southeast spend two nights on board, less time overnight than Cruiseship users. The small percentage of ferry users in Southcentral spend one to two nights on board.

Table III-B-7

### Length Of Stay By Lodging Type By Region Visited All Visitors – Summer 1989 (Average Number of Nights by Users of Each Type Only)

Lodging Type	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Hotel/Motel	2.6	2.7	2.5	2.4	1.4
Resort/Lodge	2.6	3.1	4.6	6.7	1.4
Bed & Breakfast	2.8	3.1	2.8	2.2	2.1
Private Home	18.7	11.9	9.6	8.4	3.0
RV/Campground	4.6	6.6	3.8	7.4	2.4
Cruiseship	4.1	2.5	-	-	-
Ferry	2.3	1.5	-	1.4	-
Other	4.8	19.9	5.7	4.2	4.8

## Lodging Type Use by Community

Data gathered in the *Visitor Opinion Survey* includes detailed community information on the percent of visitors using a particular lodging type in a specific community, as well as the length of stay in each lodging type in each community of those using that particular lodging type. This information is presented in Tables III-B-8 and III-B-9.

These tables read across, rather than from top to bottom. For example, the reader interested in visitors to Ketchikan would consult Table III-B-8 first. In Table III-B-8, among visitors to Ketchikan, 40% used hotel/motels, 10% used resort/lodges, 8% used bed and breakfasts, 32% used a private home, and 13% used RV/campground. Next, the reader would consult Table III-B-9 and see that among the users of hotel/motels, the average stay was 2.2 nights; among visitors using resort/lodges, the average stay was 1.7 nights; among visitors using bed and breakfast accommodations the average stay was 2.0 nights and so on. Communities can use this information to gain an understanding of the role of each lodging type in their community.

Table III-B-8

**Lodging Type Use**  
**All Visitors – Summer 1989**  
 (Percent of Regional Visitors Using Lodging By Each Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise- ship	Ferry
<b>Southeast</b>							
At Sea	–%	–%	–%	–%	–%	80%	19%
Ketchikan	40	10	8	32	13	–	–
Wrangell	61	–	–	25	14	–	–
Petersburg	64	–	8	12	16	–	–
Sitka	38	–	11	12	39	–	–
Juneau	66	1	5	15	14	–	–
Haines	40	–	3	2	57	–	–
Skagway	53	2	4	5	37	–	–
Glacier Bay	13	58	11	–	17	–	–
Other Southeast Locations	4	24	–	48	8	–	–
<b>Southcentral</b>							
At Sea	–%	–%	–%	–%	–%	88%	5%
Anchorage	60	1	4	26	12	–	–
Homer	20	3	17	12	56	–	–
Kenai/Soldotna	18	15	4	13	57	–	–
Seward	25	–	11	8	55	–	–
Other Kenai Peninsula Com.	9	15	–	19	55	–	–
Wasilla	22	8	3	43	31	–	–
Palmer	25	–	–	19	56	–	–
Valdez/Prince William Sound	37	–	13	–	49	–	–
Cordova	7	–	–	–	30	–	–
Other Southcentral Locations	25	14	5	21	45	–	–
<b>Interior/Northern</b>							
Fairbanks	63%	–%	4%	7%	27%	–%	–%
Tok	32	–	–	1	67	–	–
Kotzebue	100	–	–	–	–	–	–
Nome	90	–	–	–	10	–	–
Barrow	53	–	–	35	12	–	–
Prudhoe Bay	92	–	–	–	5	–	–
Other Interior Locations	13	4	–	24	56	–	–
<b>Southwest</b>							
At Sea	–%	–%	–%	–%	–%	–%	100%
Bethel	–	–	34	34	–	–	–
Dillingham	–	50	50	–	–	–	–
Kodiak	23	13	11	53	24	–	–
Katmai	–	46	–	–	50	–	–
King Salmon	21	71	–	6	1	–	–
Aleutians	19	3	–	75	3	–	–
Lodges:							
Alaska Peninsula	–	67	–	11	22	–	–
Bristol Bay	–	96	–	–	4	–	–
Lake Clark/Iliamna	–	92	–	4	–	–	–
Other Southwest Locations	2	24	1	18	6	–	–
<b>Denali/McKinley</b>	<b>25</b>	<b>41</b>	<b>1</b>	<b>1</b>	<b>35</b>	<b>–</b>	<b>–</b>



Table III-B-9

## Lodging Type Use All Visitors - Summer 1989

(Average Number of Nights Spent by Regional Visitors in Region and Community)

Visitors Using	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise- ship	Ferry
<b>Southeast</b>							
At Sea	-	-	-	-	-	4.1	2.3
Ketchikan	2.2	1.7	2.0	22.9	7.4	-	-
Wrangell	1.3	-	-	6.2	1.0	-	-
Petersburg	2.2	-	1.7	7.5	1.6	-	-
Sitka	1.9	-	1.7	4.7	1.7	-	-
Juneau	1.8	6.0	3.2	10.9	2.7	-	-
Haines	1.2	-	1.2	2.4	2.3	-	-
Skagway	1.2	1.1	1.3	34.0	2.0	-	-
Glacier Bay	1.2	1.9	1.0	-	1.0	-	-
Other Southeast Locations	4.6	4.3	-	5.5	1.8	-	-
<b>Southcentral</b>							
At Sea	-	-	-	-	-	2.5	1.6
Anchorage	2.4	1.3	4.0	11.5	4.1	-	-
Homer	1.5	5.0	2.0	12.1	2.1	-	1.0
Kenai/Soldotna	1.2	4.1	1.0	7.7	3.1	-	-
Seward	1.7	2.0	1.4	4.8	1.7	-	-
Other Kenai Peninsula Com.	1.5	1.9	-	8.6	2.9	-	-
Wasilla	3.2	2.0	1.4	3.2	2.0	-	-
Palmer	2.0	1.0	-	12.3	1.4	-	-
Valdez/Prince William Sound	1.0	-	1.0	-	1.9	-	-
Cordova	3.3	-	-	-	1.0	-	-
Other Southcentral Locations	1.3	1.9	1.8	4.7	2.9	-	-
<b>Interior/Northern</b>							
Fairbanks	1.8	1.7	2.8	9.6	2.7	-	-
Tok	1.3	1.0	-	8.0	1.7	-	-
Kotzebue	1.0	-	-	-	-	-	-
Nome*	5.3	-	-	-	1.0	-	-
Barrow	1.6	-	-	3.0	6.0	-	-
Prudhoe Bay*	5.4	-	-	-	6.0	-	-
Other Interior Locations	1.9	7.0	-	10.7	2.0	-	-
<b>Southwest</b>							
At Sea	-	-	-	-	-	-	1.4
Bethel	-	-	1.0	7.0	-	-	-
Dillingham	-	14.0	3.0	-	-	-	-
Kodiak	3.0	2.7	3.0	5.7	2.8	-	-
Katmai	-	5.7	-	-	6.7	-	-
King Salmon	1.7	6.7	-	6.0	2.0	-	-
Aleutians	3.0	2.0	-	16.3	9.0	-	-
Lodges:							
Alaska Peninsula	-	8.0	-	-	-	-	-
Bristol Bay	-	7.0	-	-	-	-	-
Lake Clark/Iliamna	-	5.0	-	-	-	-	-
Other Southwest Locations	4.2	10.0	7.0	7.4	9.3	-	-
<b>Denali/McKinley</b>	<b>1.3</b>	<b>1.4</b>	<b>2.1</b>	<b>3.0</b>	<b>2.4</b>	<b>-</b>	<b>-</b>

\* Caution, small sample size.

## Regional Visitor Overlap Patterns

Table III-B-10 reviews regional visitor overlap patterns. Most visitors to Alaska visit more than one region during their trip. For example, of the visitors to Southcentral Alaska, 46% also visited Southeast, 47% also visited Interior/Northern, 48% also visited Denali/McKinley and 10% also visited Southwest. The implications of regional visitor overlap for instate marketers is significant. Many businesses can reach potential customers by marketing in another region which may be visited by these customers.

Over half of Southeast's visitors find their way to Southcentral, a third to Interior/Northern and nearly two-thirds to Denali/McKinley. A smaller share (15%) visit Southwest. Since 1985, the number of Southeast visitors also visiting Southcentral and Denali/McKinley has grown. This increase is due, in part to the changing tour patterns of the cruise market.

Among visitors to Southcentral, about half also visit Southeast, Interior/Northern and Denali/McKinley. The number of Southcentral visitors who also visited the Interior/Northern region dropped from 61% in 1985 to 47% in 1989. One in ten visitors to Southcentral also visits Southwest, the same as 1985.

Interior/Northern visitors travel widely throughout the state, but rarely to the Southwest region. Southwest visitors, on the other hand, do not travel much around the state. A large portion (88%) of Southwest visitors also visit Southcentral, but few ever reach Southeast. In 1985, 38% of visitors to Southwest also visited Denali/McKinley. In 1989, that figure had fallen to 12%. The limited visitation to other parts of Alaska by Southwest visitors may explain why their length of stay has decreased by 30% since 1985.

Table III-B-10

### Regional Visitor Overlap By Region Visited All Visitors – Summer 1989 (Percent of Each Region's Visitors)

Also Visited	Regions Visited				
	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Southeast	100%	46%	61%	2%	36%
Southcentral	53	100	92	88	98
Interior/Northern	36	47	100	24	79
Southwest	15	10	6	100	3
Denali/McKinley	63	48	76	12	100

## Community Visitor Overlap

The *Visitor Opinion Survey* is designed to identify the percentage of visitors to each region who visit communities and attractions in other regions of the state. For example (see Table III-B-11) among visitors to Southcentral Alaska, 38% also visit Juneau, 41% also visit Fairbanks and 48% also visit Denali/McKinley. This information is invaluable to instate marketers who want to reach visitors while they travel around the state.

Southeast visitors, in addition to visiting many communities in the Southeast region, most often visit Anchorage (51%), Fairbanks (33%) and Denali (36%). Since 1985, the number of Southeast visitors traveling to Southcentral communities and on to Denali/McKinley has increased. The extended travel or overlap patterns can be directly attributed to the growth in cruise packages that include crossing the Gulf of Alaska. However, the number of overlapping visits to the Interior and Southwest regions has not changed much since 1985.

Southcentral visitors, as mentioned above, most often visit Fairbanks and Juneau. Nearly one-third also visit Ketchikan and Skagway. In fact, since 1985, visits to Southeast communities by Southcentral visitors have increased. Again, the growth of cruises crossing the Gulf of Alaska has played a part in this increase. The number of visits to Denali/McKinley and Southwest by Southcentral visitors is nearly identical to 1985, however, visits to the Interior/Northern communities have fallen significantly. Fairbanks, for instance, received 53% of Southcentral visitors in 1985 compared to 41% in 1989.

On the other hand, a large percentage of visitors to the Interior/Northern region also travel to communities in both Southcentral and Southeast. The most often visited communities are Anchorage (90%), Juneau (47%) and Skagway (45%). There has been little change since 1985 in the percentage of those visitors to Interior/Northern visiting Southcentral and Southwest Alaska. Southeast Alaska and Denali/McKinley are both seeing higher percentages of Interior/Northern visitors in their regions than in 1985.

Southwest visitors are not only spending less time in the state than in 1985, they are also traveling to fewer regions and communities. Most often visited by this group are Anchorage (88%) and other Southcentral locations. However, these percentages have fallen considerably since 1985. For instance, 33% of Southwest visitors also visited Seward in 1985, but only 12% in did so in 1989. Southwest visitors are primarily attracted to the excellent sportfishing opportunities in the region. It appears most of this region's visitors come to Alaska to visit the Southwest region only and are not very interested in other parts of the state.

Visitors to the Denali/McKinley region tend to travel widely around the state, but seldom visit the Southwest region. Since 1985, the percentage of Denali/McKinley visitors extending their travel on to the Interior/Northern region has decreased. While Denali/McKinley region visitors have increased their visits to Southeast. (Fairbanks, for example saw 73% of Denali/McKinley visitors in 1989 compared to 87% in 1985. Juneau hosted 49% of Denali/McKinley visitors in 1989 compared with 44% in 1985).

Table III-B-11

**Community Visitor Overlap**  
**All Visitors – Summer 1989**  
 (Percent Each Region's Visitors)

Visitors to These Regions:	South-east (307,700)	South-central (356,400)	Interior/ Northern (180,500)	South-west (42,000)	Denali/ McKinley (175,200)
<b>Visited These Communities:</b>					
<b>Southeast</b>					
Juneau	81%	38%	47%	10%	49%
Ketchikan	74	31	35	10	38
Skagway	61	32	45	6	46
Glacier Bay	55	24	27	5	30
Sitka	41	16	19	3	22
Haines	23	13	24	1	23
Wrangell	14	7	11	–	10
Petersburg	10	5	9	1	9
Other Southeast Locations	3	1	1	3	1
<b>Southcentral</b>					
Anchorage	51	97	90	88	97
Seward	18	34	35	12	42
Kenai/Soldotna	12	32	28	16	35
Palmer	13	30	32	13	36
Homer	11	28	28	16	32
Valdez/Prince William Sound	22	27	33	17	36
Wasilla	10	25	24	11	29
Whittier	20	24	27	7	32
Glennallen	9	17	27	7	24
Other Kenai Peninsula Communities	6	15	13	6	18
Cordova	1	3	3	5	5
Other Southcentral Locations	2	7	4	3	6
<b>Interior/Northern</b>					
Fairbanks	33	41	85	15	73
Tok	21	23	48	8	41
Nome	2	3	6	–	5
Prudhoe Bay	1	2	6	3	3
Kotzebue	2	3	5	–	5
Barrow	1	2	3	5	1
Other Interior Locations	4	5	12	4	10
<b>Southwest</b>					
King Salmon	1	4	2	43	–
Kodiak	1	3	2	25	2
Bethel	1	1	1	12	–
Aleutians	–	1	1	12	–
Dillingham	–	1	1	9	–
Katmai	–	–	–	8	–
Iliamna	–	–	–	5	–
Other Southwest Locations	–	3	–	24	–
<b>Denali/McKinley</b>	<b>36</b>	<b>48</b>	<b>76</b>	<b>12</b>	<b>100</b>

## Regional Visitors to Attractions

Regional visitors to Alaska attractions shown on Table III-B-12 is similar to the community visitor overlap patterns on the previous table. For example, of the visitors to Southeast Alaska, 25% also visited Portage Glacier, 10% also visited the Kenai River and 16% also visited the Columbia Glacier.

Table III-B-12

### Regional Visitors to Attractions All Visitors – Summer 1989 (Percent Of Each Region's Visitors)

	South- east (307,700)	South- central (356,400)	Interior/ Northern (180,500)	South- west (42,000)	Denali/ McKinley (175,200)
<b>Southeast</b>	<b>100%</b>	<b>46%</b>	<b>61%</b>	<b>2%</b>	<b>36%</b>
Inside Passage	74	34	43	8	45
Mendenhall Glacier	65	29	36	2	38
Glacier Bay	59	25	28	7	30
Ketchikan Totems	58	23	24	8	27
Skagway's Historic Gold Rush District	57	28	39	5	40
Sitka's Russian Church/Dancers	33	12	13	3	14
Alaska State Museum	31	17	24	8	25
Sitka National Historic Park	28	10	13	1	14
Chilkat Bald Eagle Preserve	14	8	14	—	14
Misty Fjords National Monument	12	6	6	4	7
Tracy Arm	10	4	4	3	6
Eaglecrest Ski Area	2	1	2	—	2
<b>Southcentral</b>	<b>53%</b>	<b>100%</b>	<b>92%</b>	<b>88%</b>	<b>98%</b>
<b>Anchorage Area</b>					
Portage Glacier	25	67	52	27	58
Anchorage Museum of History/Art	21	42	39	13	45
Alyeska Ski Resort	9	27	20	13	26
Chugach State Park	9	27	24	18	24
Lake Hood Air Harbor	7	20	14	13	16
Potter Point State Game Refuge	5	15	11	6	12
St. Nicholas Russian Orthodox Church and Native Spirit Houses	6	14	12	9	14
Crow Creek Mine	3	9	7	3	10
<b>Kenai Peninsula</b>					
Kenai River	10	34	22	9	26
Kenai National Wildlife Refuge	7	20	16	6	19
Resurrection Bay	5	19	14	1	18
Kachemak Bay	4	13	9	9	13
Kenai Fjords National Monument	4	11	9	3	10

Table III-B-12, Con't

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
<b>Southcentral Con't</b>					
<b>Prince William Sound Area</b>					
Columbia Glacier	16	26	22	7	28
Prince William Sound	15	24	21	15	24
Valdez Pipeline Terminal	12	21	21	5	22
College Fjords	9	11	8	5	9
<b>Matanuska-Susitna Area</b>					
Matanuska Glacier	6	17	17	8	16
Hatcher Pass Recreation Area	2	11	7	1	10
Independence Mine					
State Historic Park	10	7	5	-	6
Alaska Historical and Transportation Museum	2	3	4	-	4
<b>Interior Northern</b>	<b>36%</b>	<b>47%</b>	<b>100%</b>	<b>24%</b>	<b>79%</b>
<b>Fairbanks Area</b>					
University of Alaska - Fairbanks	22	26	69	10	50
University of Alaska Museum	17	20	54	9	38
Large Animal Research Station	8	9	25	2	18
Agricultural & Forestry (Experimental Station Farm)	6	6	16	-	12
Geophysical Institute	1	1	3	-	3
Transalaska Pipeline	20	25	65	10	45
Alaskaland	12	15	41	3	27
Dog Mushing Attractions	15	16	41	2	30
Chena River Trips	13	14	38	1	28
Gold Panning Dredges & Saloons	10	13	34	4	23
Hot Springs	3	4	9	-	8
<b>Other Northern Areas</b>					
Pipeline Haul Road	2	3	7	2	5
Nome - Gold Rush History	3	3	6	-	5
Kotzebue - Eskimo Culture	2	3	5	-	5
Prudhoe Bay Oil Fields	1	2	4	3	3
Barrow	-	1	2	4	1
Brooks Range	-	-	2	2	1
Gates of the Arctic National Park	-	-	1	-	-
Arctic National Wildlife Refuge	-	-	1	-	1
<b>Southwest</b>	<b>15</b>	<b>10</b>	<b>6</b>	<b>100</b>	<b>3</b>
Kodiak Russian Orthodox Church	1	2	1	18	1
Katmai National Park	-	1	-	13	-
Kodiak National Wildlife Refuge	-	1	1	10	1
Fort Abercrombie	-	1	1	9	1
Aleutian Islands	-	1	-	9	-
Baranof Museum	-	1	1	6	-
Wood River - Tikchik State Park	-	1	1	5	-
Lake Clark National Park	-	-	-	1	-
Round Island	-	-	-	1	-
<b>Denali/McKinley</b>	<b>63</b>	<b>48</b>	<b>76</b>	<b>12</b>	<b>100</b>

## C. Visitor Travel Planning by Regional Visitors

### Alaska Trip Planning Timelines

The average time elapsed between the decision to visit Alaska and the actual travel date is 8.1 months for all visitors. Those planning travel to the Southwest region and to Denali/McKinley have the longest planning timeline, with over 40% deciding to go a full year or more prior to their actual travel date. Just over one-third of each remaining region's visitors decide to go to Alaska a year or more in advance.

Trip arrangements are made on average 4.5 to 5.3 months in advance, with visitors to Southeast and Interior/Northern making their trip arrangements earlier than other regional visitors. Most visitors to most regions tend to make their arrangements either two to three months in advance or six to seven months in advance. However, well over half (62%) of the visitors to Southwest make their trip arrangements three months or less in advance, the latest of any regional visitor group.

Graph III-C-1

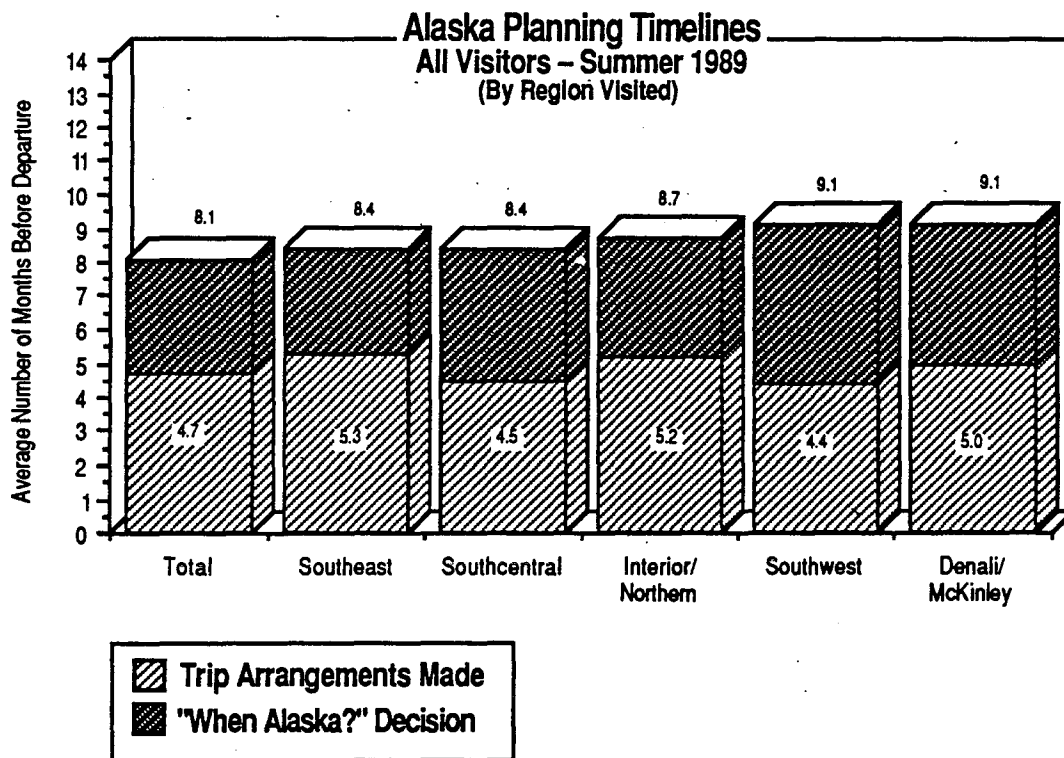


Table III-C-1

**Lead Time For Alaska Season/Year Decision  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

Months Before Trip	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
1 Month or Less	8%	8%	7%	13%	4%
2 - 3 Months	17	16	15	20	14
4 - 5 Months	7	6	6	–	8
6 - 7 Months	20	22	22	7	22
8 - 9 Months	9	9	8	12	9
10 - 12 Months	25	25	24	26	27
More Than 1 Year	14	15	17	21	16

Table III-C-2

**Lead Time For Trip Arrangements  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

Months Before Trip	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
1 Month or Less	13%	21%	14%	18%	11%
2 - 3 Months	23	28	23	44	25
4 - 5 Months	15	14	15	12	16
6 - 7 Months	26	24	28	10	30
8 - 9 Months	10	6	9	5	8
10 - 12 Months	11	7	7	6	7
More Than 1 Year	1	2	.3	5	1



## Alaska Trip Decision Criteria

Visitors were asked, "Please tell us what prompted you to actually decide to visit Alaska this year". The most often mentioned reasons for four out of five regional visitors were personal. Personal reasons for traveling to Alaska this year ranged from the opportunity to travel with friends and relatives to the rather vague, "just felt like it". Other personal reasons included trip timing, special occasion (gift, honeymoon, anniversary), and had never been to Alaska. For all regions, except Southwest, personal factors play a major role in determining whether a potential visitor decides to visit Alaska this year.

For Southeast visitors, the second most mentioned reason for visiting Alaska this year was the long time desire to see the state, followed by the desire to visit friends and relatives. Southeast visitors also were recommended by others to visit the state, evidence of the importance of word of mouth among past visitors.

Visiting friends and relatives was the second most often mentioned reason for visiting Alaska this year with the exception of the Southwest region. For Southwest visitors, the attractions and appeal of Alaska (primarily fishing) were as important as visiting friends and relatives. Both these factors were the main reasons for Southwest visitors visiting Alaska this year.

Table III-C-3

**Main Reason For "When Alaska?" Decision  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Personal Reasons	42%	32%	40%	11%	39%
2. Visit Friends/Relatives	11	28	18	32	21
3. Attractions/Appeal	8	13	5	32	8
4. Long Time Desire	15	10	15	4	13
5. Recommended By Others	9	7	7	10	9
6. Business	4	6	7	18	3
7. Advertising/Promotion	5	3	5	–	4
8. Price/Discount Considerations	4	3	3	–	4
9. Wanted To Cruise	6	2	–	–	–
10. Trip Extension	2	2	2	–	2
11. Curiosity	2	2	2	–	3
12. Cool Weather	1	1	–	–	1
13. Visit All 50 States	1	1	2	–	2
14. Other	4	2	4	–	2

## Travel History of Alaska Visitors

Visitors to all regions of Alaska are well traveled. In fact, the top five most visited destinations in the past five years are similar for all regions, with Europe heading the list as the most visited destination in the past five years for four of the five regions. Nearly one-third of all regions visitors have traveled across the Atlantic to European destinations between 1985 and 1989. However, travel to Europe among all region's visitors has declined since 1985, due to increased safety concerns and the decline of the dollars' purchasing power.

Other destinations in the top five - Hawaii, California, Canada, and Florida - have attracted nearly one-quarter to one-third of each region's visitors. Three of these top five, Hawaii, California and Florida, are sun and sand destinations.

The next five competing destinations, Mexico, Washington/Oregon, Midwest, Caribbean and New England have attracted similar levels of each regions visitors with a few exceptions. Visitors to the Interior/Northern part of Alaska, for instance, have been less inclined to visit the Caribbean than visitors to other regions of the state.

Arizona, Nevada, and Australia/New Zealand have attracted smaller percentages of Alaska's regional visitors, but nevertheless, represent competition for Alaska. Clearly, all regions of Alaska continue to compete not only with other areas of the United States, but major international destinations, such as Europe, Canada, Mexico, Caribbean and Australia/New Zealand.

Table III-C-4

**Travel History of Alaska Visitors**  
**All Visitors – Summer 1989**  
**Past Five Years – Vacation Destinations**  
**(Percent of Each Region's Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Europe	36%	32%	31%	32%	36%
2. Hawaii	23	24	19	30	22
3. California	25	28	26	34	25
4. Canada	28	26	29	24	30
5. Florida	23	24	23	22	26
6. Mexico	18	15	12	12	13
7. Washington/Oregon	16	18	15	15	17
8. Midwest States	16	16	18	14	17
9. Caribbean	15	11	5	13	11
10. New England	13	13	17	17	17
11. Arizona	9	9	13	1	12
12. Nevada	9	9	6	10	7
13. Alaska	7	8	9	10	11
14. Australia/New Zealand	4	7	5	8	3

## Trip Information Sources

Visitors to all regions use a variety of information sources to plan their trip to Alaska. One of the major sources of information for all regions is the potential visitor's travel agent. Three out of four visitors to Southeast Alaska use a travel agent, the heaviest usage of all the regions.

Brochures and books are also a major source of information, especially the *State of Alaska Official Vacation Planner*. The Planner is particularly important for visitors to the Interior/Northern and Denali/McKinley regions, where the heavy concentration of highway users and independent visitors need detailed information on accommodations and services. Use of the Planner has increased significantly among all regions since 1985, especially for Interior/Northern visitors (4% in 1985 versus 41% in 1989).

Friends and relatives play a large role in providing information to potential visitors. Commercial organizations, such as AAA, cruiseslines, tour companies, lodges/guides and airlines are also important for all regions visitors. Visitors to Southwest especially rely on commercial information, primarily from fishing guides and lodges.

Other information sources mentioned included the general media, previous visit, and government organizations, such as the Alaska Marine Highway or Forest Service.

Table III-C-5

### Trip Information Sources By Region Visited All Visitors - Summer 1989 (Percent of Each Region's Visitors)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Travel Agent	76%	61%	58%	72%	59%
Brochures/Books	38	46	57	29	57
State Vacation Planner	28	33	41	17	42
Friends/Relatives	13	21	17	24	20
Commercial Organizations	20	19	21	37	21
General Media	6	7	9	5	9
Previous Visit	3	5	4	14	2
Government Organizations (Other Than Div. of Tourism)	2	3	3	-	4
Other	1	-	-	-	1

## Frequent Flyer Program Use

Use of frequent flyer programs by Alaska visitors was measured for the first time in the 1989 *Visitor Opinion Survey*. The popularity of these programs can be seen by the percentage of visitors using them on a portion of their Alaska trip.

Visitors to Southcentral Alaska and Southwest Alaska, the two regions with the largest number of Domestic Air user parties use frequent flyer programs most heavily. In Southcentral, nearly one-third (31%) of all Domestic Air user parties used frequent flyer programs to come to Alaska (either for entry, exit or both). In other words, someone in nearly one out of three parties who visited Southcentral and used Domestic Air used frequent flyer mileage to purchase an air ticket. If this use is translated to all visitor parties visiting Southcentral Alaska, then nearly one in four visitor parties to this region included someone using a frequent flyer ticket ( $77\% \times 31\% = 24\%$ ). This is also true for the Southwest region.

Visitor parties to the remaining regions also report significant use of frequent flyer programs. Among all visitor parties to Denali, one in five include someone using a program, among visitor parties to the Interior, one in six. Southeast has the smallest usage, (13% of all visitor parties), which is due in part to the heavy use of cruiseships to enter or exit Alaska, rather than air. Cruiseship users also have access to low-cost air add-ons available through the cruiselines.

Table III-C-6

### Use Of Frequent Flyer Mileage By Region Visited Domestic Air Users – Summer 1989 (Percent of Each Region's Domestic Air Users)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
<b>Yes</b>	27%	31%	27%	26%	30%
<b>No</b>	73	69	73	74	70
<b># In Party Using</b>					
One	49	50	28	57	34
Two	36	38	47	29	60
Three	5	3	3	—	—
Four	7	6	8	15	1
Five	2	3	12	—	3
Six Or More	1	—	2	—	1
<b>% of all Visitor Parties with Frequent Flyer Mileage User</b>	13%	24%	17%	23%	20%

## Impacts of Exxon Valdez Oil Spill on Trip Planning

Trip planning by all regional visitors was affected by the Exxon Valdez Oil Spill of March 24, 1989. The most affected region was Southwest Alaska, with one in five visitors reporting their travel plans were affected. The Southeast region's visitors were least affected, though still one in eight visitors reported some travel planning was affected.

When asked how the spill affected trip planning, about half of the visitors to all regions (except Southwest) reported avoiding the spill-affected area. A small percentage of each region's visitors actually included Valdez in their travel plans to learn more about the spill firsthand.

Some visitors to Southcentral also mentioned they had a difficult time making reservations, and some didn't go fishing as planned. Other visitors' travel plans included spill-related business – including working on the spill or visiting someone who was. A small percentage of visitors to Interior/Northern Alaska also indicated they did not go fishing as planned.

Graph III-C-2

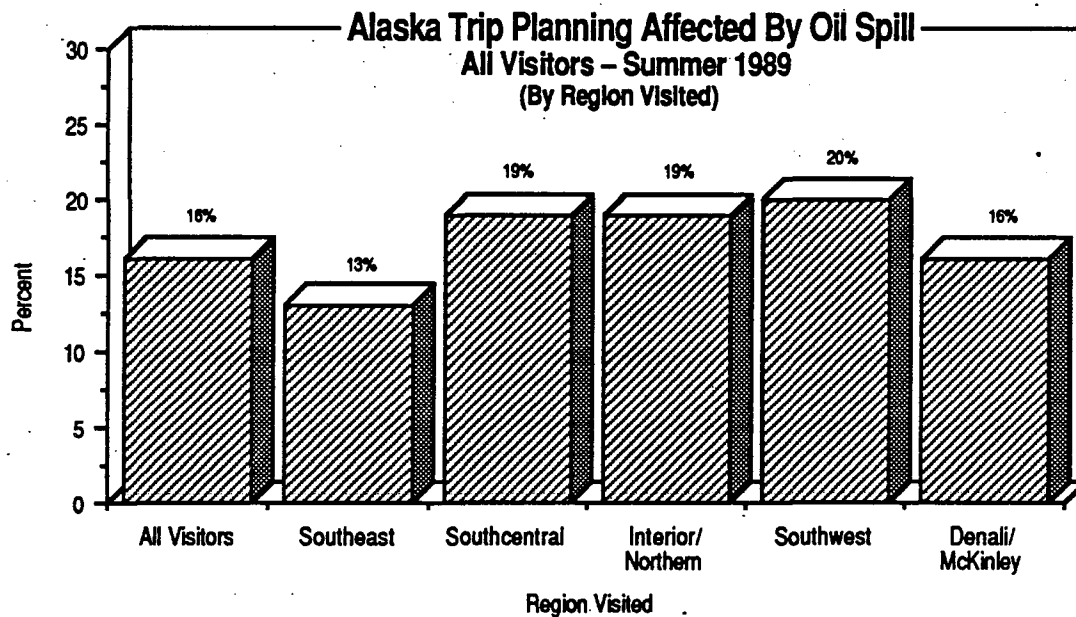


Table III-C-7

**How Oil Spill Affected Trip Planning  
By Region Visited  
Those Affected By Spill – Summer 1989  
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
1. Avoided the Area	47%	44%	55%	7%	58%
2. Went To Valdez To Learn More Firsthand	7	4	3	22	2
3. Had Difficult Time Getting Reservations	-	4	-	-	-
4. Came To Help Clean-Up	-	4	-	-	-
5. Business Trip Related To Spill	-	2	-	-	-
6. Didn't Go Fishing As Planned	-	3	5	-	-
7. Came To Visit Spill Worker	-	2	-	-	-
8. Wouldn't Travel By Water	-	1	2	-	-



## Travel Agent Involvement

The role of travel agents has increased in importance for visitors to all regions since 1985, except Denali/McKinley. Southeast visitors use travel agents the most 76%, up from 71% in 1985. Southwest visitor use of travel agents has increased from 64% in 1985 to 72% in 1989, Southcentral visitors from 52% in 1985 to 61% in 1989, Interior/Northern visitors from 52% to 58%. Denali/McKinley visitors use travel agents slightly less than four years ago - 59% in 1989 compared to 61% in 1985.

Travel agents perform several functions for their clients. Major functions of travel agents for visitors to all regions, particularly Southeast visitors, include providing brochures and booking package tours or cruises. Booking independent lodging and transportation is a function used often for visitors to Southcentral, Interior/Northern, Denali/McKinley and especially Southwest. These regions all receive a higher percentage of independent visitors than Southeast.

Visitors to all regions use travel agents to a lesser degree for recommendations regarding specific places of interest, travel companies or lodging. As in the past, the travel agent seldom plays a rather insignificant role in influencing the choice of Alaska as a destination.

Graph III-C-3

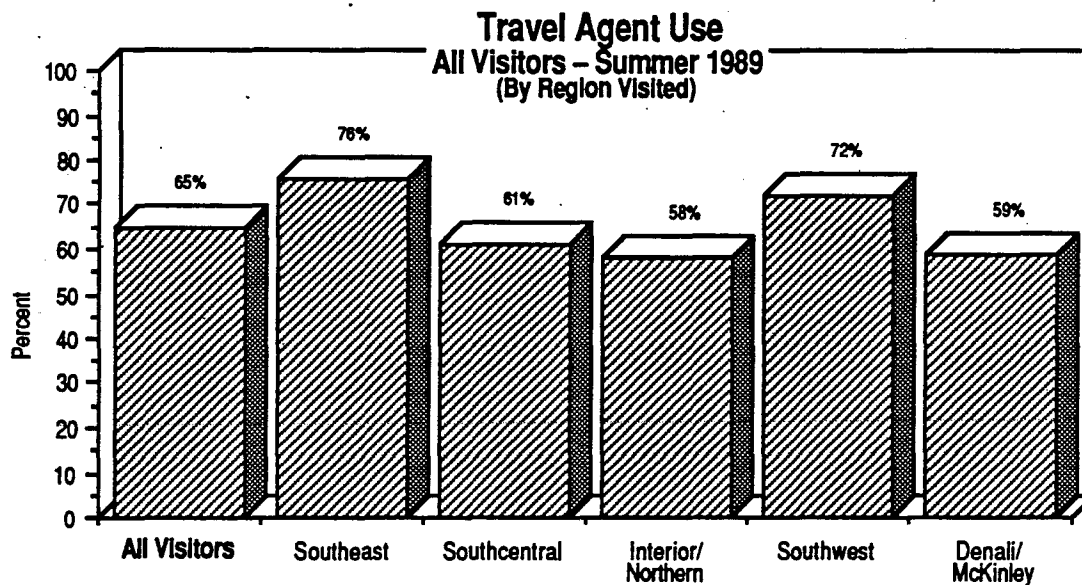


Table III-C-8

**Travel Agent Functions  
By Region Visited  
All Visitors – Summer 1989  
(Percent of Each Region's Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Provided Brochures	58%	38%	43%	22%	44%
2. Booked Cruise or Packaged Tour	59	30	37	10	37
3. Recommended Transportation Or Trip Type	27	19	18	17	19
4. Booked Independent Lodging/Transportation	16	23	21	50	22
5. Recommended Specific Place of Interest	14	12	16	10	10
6. Recommended Travel Company	15	10	11	2	1
7. Recommended Lodging	9	10	13	6	1
8. Recommended Alaska	10	6	6	1	5
9. Other	8	7	6	5	5

## **D. Visitor Demographics**

### **Education**

Visitors to Alaska tend to be very well-educated, with visitors to Southwest Alaska the most highly educated of all regional visitors. Nearly half of visitors to all regions have graduated from college .

### **Household Income**

Average household income among visitors to all regions tends to be high, with visitors to Southwest leading all regions with the highest average income. One in four Southwest visitors has a household income of over \$100,000 per year.

### **Visitor Age**

Southwest visitors (again the demographic exception) are the youngest regional group with an average age of 45 years, compared to the overall average age of 49. Visitors to Southeast, Interior/Northern and Denali/McKinley tend to be slightly older with an average age of 52. Visitors to Southcentral have an average age of 49.

### **Visitor Gender**

A majority of visitors to Southwest are male (75%), while the ratio of males to females is nearly one-to-one for visitors to all other regions. Southeast visitors include a larger number of females than any other region.

### **Visitor Employment**

While the overall visitor employment average is 52%, employment varies greatly by region. With a younger average age and a higher income, it comes as no surprise that Southwest visitors are, once again, set apart from other regions by their high (85%) rate of employment. Southcentral visitors also have a much higher than average rate of employment, influenced by the large number of business visitors to the region. The percentage of employed and retired visitors to the remaining regions, Southeast, Interior/Northern, and Denali/McKinley is nearly identical.

### **Visitor Origin**

The West is an important producer of visitors for all regions, especially Southwest. Other important producers for the Southwest include the South and the Overseas market, particularly Germany/Switzerland/Austria. The remaining regions rely heavily on visitors from the Midwest, South and Eastern U.S. Canada produces one in ten visitors for Southeast, but less for other regions. The Overseas markets, though still relatively small producers of visitors for each region, are producing an increasing share of visitors for all regions.

Table III-D-1

**Demographics**  
By Region Visited  
**All Visitors – Summer 1989**  
(Percent of Each Region's Visitors)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
<b>Visitor Education</b>					
Not High School Graduates	5%	4%	6%	5%	5%
High School Graduates	29	25	32	8	29
1 – 3 Years College	24	22	17	25	16
College Graduate	18	21	20	34	20
Attended or Completed Graduate School	23	28	25	29	30
<b>Visitor Household Income (Average Income)</b>					
	<b>\$57,400</b>	<b>\$55,800</b>	<b>\$52,500</b>	<b>\$61,000</b>	<b>\$59,900</b>
Under \$25,000	12%	19%	14%	23%	17%
\$25,000 – \$34,999	18	18	21	21	18
\$35,000 – \$49,999	25	20	24	7	21
\$50,000 – \$74,999	20	19	23	17	22
\$75,000 – \$99,999	12	10	7	6	9
\$100,000 and Over	13	15	10	26	13
<b>Visitor Age (Average Age)</b>					
	<b>52</b>	<b>49</b>	<b>52</b>	<b>45</b>	<b>52</b>
Under 18 Years	7%	6%	6%	1%	5%
18 – 24 Years	3	4	4	4	4
25 – 34 Years	6	11	7	18	10
35 – 44 Years	11	13	11	18	10
45 – 54 Years	15	19	15	34	16
55 – 64 Years	25	22	22	12	22
65 – 74 Years	26	21	31	11	30
75 + Years	6	4	4	2	4
<b>Visitor Gender</b>					
Male	46%	53%	50%	76%	49%
Female	54%	47%	50%	24%	51%
<b>Visitor Employment</b>					
Employed	49%	62%	46%	85%	48%
Retired	42	29	43	9	42
Other	9	8	11	5	11
<b>Visitor Origin</b>					
West	34%	39%	33%	52%	27%
California	16	12	12	15	9
Washington	10	12	8	29	6
Midwest	18	20	24	9	29
South	17	19	20	17	20
East	15	10	8	8	11
Canada	11	5	9	4	6
Overseas	4	7	7	10	8
Germany/Switzerland/Austria	2	3	4	6	5
Japan	<1	1	1	1	1



## **Chapter IV. Vacation/Pleasure Visitors**

- A. Visitor Opinions**
- B. Visitor Travel Patterns**
- C. Visitor Trip Planning**
- D. Demographics**



# Chapter IV. Vacation/Pleasure Visitors

## Introduction

The Vacation/Pleasure visitor is the primary target market for the Alaska visitor industry. Among all Alaska trip purpose groups, Vacation/Pleasure visitors are the most "impactable", meaning marketing efforts can directly convert prospects to customers. Business-related visitors and those who Visit Friends and Relatives are not particularly reachable by marketing efforts. Their trip decisions are usually based on motives not directly impacted by the marketing messages of industry and government.

Detailed data and analysis of the Vacation/Pleasure visitor are provided in this chapter to assist marketers in selling to this dominant market, which accounts for two-thirds of all Alaska summer visitors. Readers will find many results in Chapters II and IV to be similar because most visitors are Vacation/Pleasure visitor. However, the target Vacation/Pleasure market is unique in many important ways so a complete analysis is provided in Chapter IV.



# A Vacation/Pleasure Visitor Opinions

## Overall Alaska Trip Ratings

Vacation/Pleasure visitors rate their Alaska trip experience very high, at 6.3 on the 1 to 7 scale. Over half assigned the top "7" rating and most of the rest gave the next highest score, a six. Vacation/Pleasure visitors rate their experience slightly higher than other trip purpose groups. Less than one-half of one percent gave their Alaska trip a negative (1, 2 or 3) rating. Most pleased is the Inde-Package market, with 60% giving 7s and an average score of 6.5. Nine other Vacation/Visitor groups, including Overseas visitors, assign virtually the same rating, 6.4. The quality of the Alaska experience is clearly the state's greatest asset. Preserving and improving this quality should be the #1 priority of the state's visitor industry.

Value for the money is not the state's greatest tourism asset, but Alaska does compare fairly well to other destinations when value for the money is the measure. Vacation/Pleasure visitors are asked to rate Alaska compared to other destinations in terms of value for the money, and Alaska gets a 5.5, interpreted as "Alaska is a somewhat better value for the money than other destinations". However, just 17% of the total and 11% of Independents gave the top "7" rating. This difference between the high trip experience and lower value ratings are of some concern, especially in the large Independent market. Package tour visitors, on the other hand, give stronger value marks. The most value sensitive to what they purchased were the Germans/Swiss/Austrians, Independents and the Highway market.

Their Alaska experience exceeded the expectations of most Vacation/Pleasure, especially those in the Cruiseship and Package Tour markets.

Graph IV-A-1

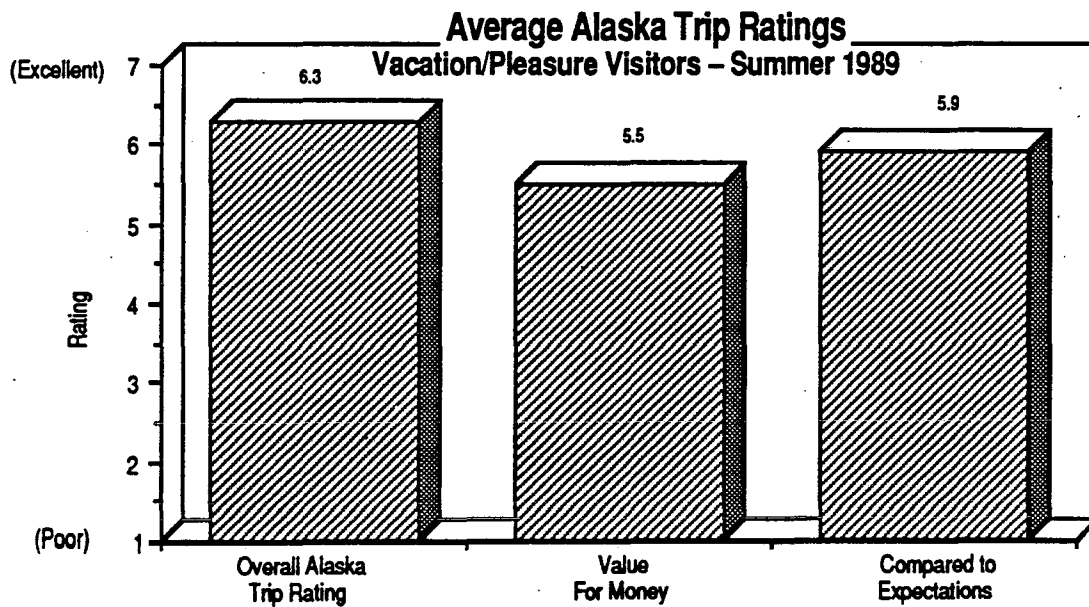


Table IV-A-1

**Average Alaska Trip Ratings**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	Overall Alaska Trip Rating	Value For Money	Compared To Expectations
<b>Total</b>	<b>6.3</b>	<b>5.5</b>	<b>5.9</b>
<b>Entry Mode</b>			
Domestic Air	6.4	5.4	5.9
Cruiseship	6.4	5.9	6.2
Highway/Private Vehicle	6.0	5.1	5.5
Ferry	6.3	5.3	5.7
International Air	6.4	5.3	5.6
<b>Mode Use</b>			
Domestic Air	6.4	5.5	6.0
Cruiseship	6.4	5.8	6.2
Highway/Private Vehicle	6.0	5.1	5.5
Ferry	6.3	5.2	5.7
International Air	6.3	5.4	5.7
<b>Intended Travel Type</b>			
Package Tour	6.4	5.8	6.1
Independent	6.1	5.2	5.9
Inde-Package*	6.5	5.1	5.5
<b>Origin</b>			
United States Total	6.3	5.6	6.0
West	6.3	5.6	5.9
California	6.3	5.8	6.0
Washington	6.3	5.2	5.3
South	6.3	5.4	5.9
Midwest	6.4	5.4	6.1
East	6.4	5.9	6.2
Canada	6.0	5.5	5.8
Overseas	6.4	5.3	5.7
Germany/Switzerland/Austria	6.3	5.1	5.7
Japan	6.3	5.3	5.7

\* Inde-Package visitors are Independents who plan to purchase in-state sightseeing tours during their trip.

## Value for the Money Ratings

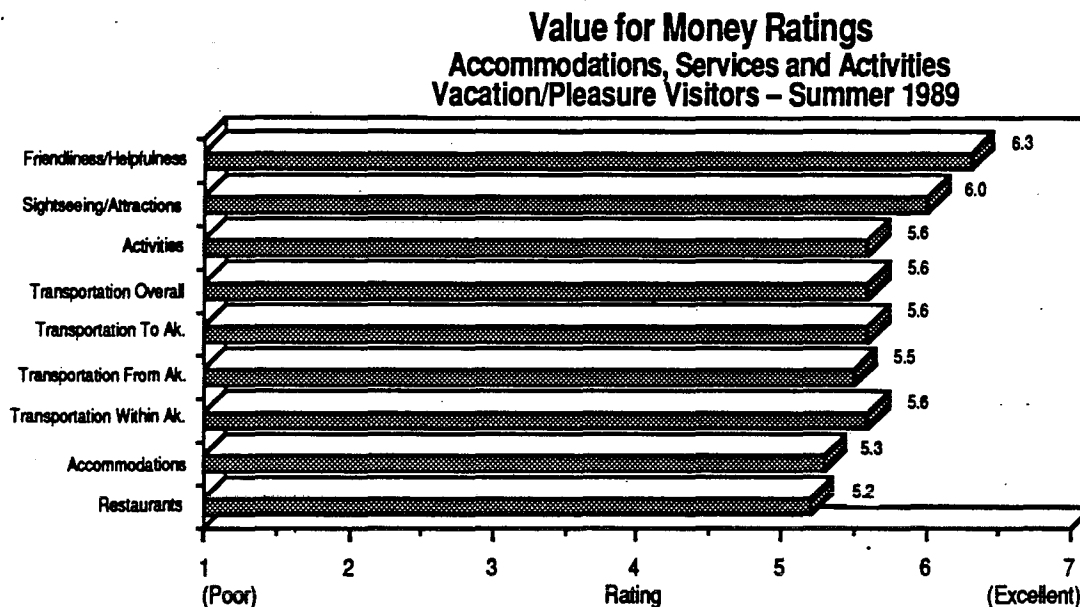
Vacation/Pleasure visitors rated the nine aspects of their Alaska experience in term of value for the money compared to other destinations they have visited within the past five years. Therefore, these ratings are not absolute value ratings but are tempered by experiences in competing destinations, most commonly Europe, Canada, Hawaii, California and Florida.

Overall Alaska trip value compares favorably with these destinations, with a 5.5 ("somewhat better value") rating. Package Tour/Cruiseship visitors uniformly assigned the highest ratings across the board, a reflection of their quality-controlled experiences throughout their trip. The package industry is extremely competitive and thrives by providing quality experiences and avoiding uncontrolled mishaps. Conversely, the lowest ratings across the board came from Overseas visitors (particularly the Japanese) and the Highway market, which is exposed to a wide range of quality along Alaska's roadways.

However, the critical nature of the Overseas ratings did not seem to affect their rating of the overall trip experience, a high 6.4. But the lower rated aspects of the trip may hinder repeat visits among the economically desirable Overseas market.

Highest rating go to the friendliness/helpfulness of people in contact with visitors during their trip. This includes workers in the industry and Alaskans met incidentally while traveling. Package Tour visitors, Southerners, and International Air and Overseas visitors were particularly taken with people in Alaska. Least impressed were the most frequent Alaska visitors, Independent V/Ps, who still gave Alaska's people a high 6.0 rating.

Graph IV-A-2



Sightseeing/Attractions were well rated by the U.S. domestic market, but were more critically assessed by Overseas visitors. The Japanese Vacation/Pleasure visitors were significantly less impressed with sightseeing and attractions. The lower Overseas ratings may be due to the extensive international experience of this well-traveled market. The Japanese ratings are likely a result of the experience factor as well as the Japanese need for premium quality in all aspects (including urban aspects such as shopping) of their trip.

Activities and the four categories of transportation (to, from, within, and overall) received essentially the same ratings, 5.5-5.6. Again, Overseas and Highway/Ferry markets were lukewarm at best about these values while the other domestic markets were more enthusiastic.

Accommodations and restaurants received mediocre, but slightly positive, ratings from most groups. Cruiseship visitors assigned more value to these aspects than did other groups.

Table IV-A-2

**Value for Money Ratings**  
**Accommodations, Services, and Activities**  
**Vacation/Pleasure Visitors - Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

Mode Use	Friend- liness/ Helpful- ness	Sight- -seeing Attrac- tions	Activ- ities	Transpor- -tation Overall	Trans- -portation To	Transpor- -tation From	Trans- -portation Within	Accom- -moda- -tions	Res- -taur- -ants
Domestic Air	6.2	6.1	5.7	5.6	5.7	5.5	5.7	5.2	5.0
Cruiseship	6.5	6.0	5.7	5.9	6.0	5.8	5.9	5.8	5.6
Highway/PV	6.1	5.9	5.3	4.7	4.5	4.8	5.0	4.6	4.8
Ferry	6.1	5.9	5.4	5.1	5.0	5.3	5.1	4.8	4.6
International Air	6.4	5.7	5.4	5.7	5.4	5.1	5.0	5.3	5.0
<b>Travel Type</b>									
Package Tour	6.4	6.0	5.7	5.9	5.9	5.8	5.9	5.8	5.5
Independent	6.0	5.9	5.4	5.1	5.1	5.1	5.0	4.8	4.7
Inde-Package*	6.2	6.1	5.7	5.2	5.2	5.2	5.4	4.6	4.8
<b>Origin</b>									
United States Total	6.3	6.0	5.7	5.6	5.6	5.6	5.7	5.3	5.2
West	6.2	6.0	5.7	5.7	5.8	5.6	5.6	5.4	5.1
California	6.3	6.0	5.8	5.9	5.9	5.7	5.7	5.5	5.2
Washington	5.8	6.1	5.7	5.2	5.7	5.4	5.5	5.0	4.7
South	6.4	6.0	5.6	5.4	5.5	5.6	5.6	5.3	5.2
Midwest	6.3	6.0	5.6	5.6	5.5	5.5	5.7	5.1	5.1
East	6.3	6.2	5.8	5.6	5.4	5.4	5.8	5.6	5.5
Canada	6.1	5.9	5.6	5.5	5.5	5.6	5.5	5.3	5.5
Overseas	6.3	5.6	5.3	5.7	5.4	5.1	4.9	5.1	4.8
Germany/Switzerland/ Austria	6.4	5.6	5.3	4.6	5.2	4.9	4.5	4.6	4.6
Japan	6.2	4.9	5.0	**	4.6	4.6	4.5	5.1	4.9

\* Inde-Package visitors are Independents who plan to purchase in-state sightseeing tours during their trip.

\*\* Sample size too small.

## Regional Satisfaction Ratings

Southeast Vacation/Pleasure visitors like their resorts/lodges, cruiseships and bed and breakfasts but show less enthusiasm for the quality of Southeast hotel/motels and RV/campgrounds in the region. Their favorite tour experience is flightseeing and among activities, rafting, hiking and canoeing/kayaking top the ratings. Southeast visitors also are quite satisfied with their experiences using visitor information centers and cultural attractions/museums in the region. The train experience in Southeast gets significantly less approval (though positive at 5.0) than the Alaska Railroad.

Southcentral Vacation/Pleasure visitors rate their hotels/motels higher than either the resort/lodges or bed and breakfasts in the region. The quality of hotels/motels in the region is also rated moderately higher than in either the Southeast or Interior/Northern regions. Southcentral visitors especially appreciate the train experience and rate both rental RV and car services as quite good. Visitors are not particularly satisfied with shopping or restaurants/nightlife in any region, even in Southcentral where more opportunities exist. Flightseeing and day cruises top the tour list in this region while rafting, hiking and canoeing/kayaking lead the activities list in satisfaction, just as they do in Southeast Alaska.

Interior/Northern Vacation/Pleasure visitors love their bed and breakfasts but assigned one of the few negative ratings in the study to resorts/lodges in the region, repeating the 3.9 rating received in 1985. The train is the top rated experience in this region, just ahead of flightseeing and day cruises. Also scoring higher than in any other region were Interior/Northern in-state air travel experiences, visitor information centers and cultural attractions/museums. Interior/Northern activities generally score lower than in other regions, except for a firm 6.3 rafting rating.

Southwest Vacation/Pleasure visitors give that region's activities the highest marks in the state. Fishing (fresh water more than salt water), hunting, rafting, and canoeing/kayaking all score very well, between 6.5 and 6.9, and the state's highest flightseeing score was in Southwest. Conversely, the region's urban amenities, services and attractions drew the state's lowest scores. But again, problems with amenities did not detract from the overall Southwest visitor trip experience, rated as the state's highest among regions.

As expected, the Denali/McKinley region received high Vacation/Pleasure visitor ratings for wildlife viewing, hiking, rafting and flightseeing activities. Improvement since 1985 is noted in the region's lodging ratings, a result of new facilities. The train experience is also popular in this region. Denali/McKinley shopping and restaurants/nightlife receive the state's lowest ratings. Unsolicited comments indicated shopping dissatisfaction. The park tour (shown as "other tours" in the following table) was well-rated at 6.0.

Table IV-A-3

**Regional Satisfaction Ratings**  
**Accommodations, Services, and Activities**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
<b>Accommodations</b>					
Hotel/Motel	5.1	5.4	5.0	3.8	5.4
Resort/Lodge	6.4	5.2	3.9	6.2	5.7
Bed & Breakfast	6.0	5.2	6.3	6.5	3.7
RV/Campground	5.0	5.0	5.1	5.3	5.2
Cruiseship	6.3	6.1	–	–	–
Ferry	5.4	5.9	–	6.0	–
<b>Transportation</b>					
Motorcoach	5.2	5.8	5.9	4.0	5.7
Train	5.0	6.1	6.5	–	6.1
Air	5.2	5.4	6.2	5.8	5.6
Cruiseship	6.2	6.3	–	–	–
Ferry	5.5	5.8	–	7.0	–
Rental Car	5.4	5.7	5.7	2.7	5.9
Rental RV	5.4	6.1	6.1	–	5.7
<b>Restaurants/Nightlife</b>	5.2	5.1	5.0	4.8	4.9
<b>Shopping</b>	5.2	5.3	5.0	5.4	4.7
<b>Visitor Information Centers</b>	5.9	6.0	6.1	5.7	5.9
<b>Sightseeing</b>					
Flightseeing	6.3	6.4	6.4	6.7	6.5
Day Cruises	6.1	6.2	6.1	6.2	6.0
City Tours	5.8	5.6	5.8	–	5.7
Other Tours	5.9	6.0	6.0	5.8	6.0
<b>Cultural Attractions/ Museums</b>	5.8	5.9	6.1	5.3	5.8
<b>Activities</b>					
Canoeing/Kayaking	6.3	6.2	4.2	6.8	5.6
Rafting	6.1	6.0	6.3	6.9	6.2
Hiking	6.1	6.1	5.5	5.9	6.1
Fishing (Overall)	5.7	5.5	5.3	6.5	4.6
Freshwater Fishing	5.6	5.4	5.2	6.2	4.2
Saltwater Fishing	5.7	5.5	4.5	5.1	4.2
Wildlife Viewing	5.8	5.9	5.3	5.8	6.1
Bird Watching	5.7	5.6	5.1	5.0	5.6
Hunting	***	5.3	4.6	6.8	2.1
Downhill Skiing	–	–	5.0	–	–
Cross Country Skiing	–	–	5.0	–	–
Snowmobiling	–	–	–	–	–
Dogsledding	–	5.6	4.6	–	6.1

\*\*\*Sample Size Too Small

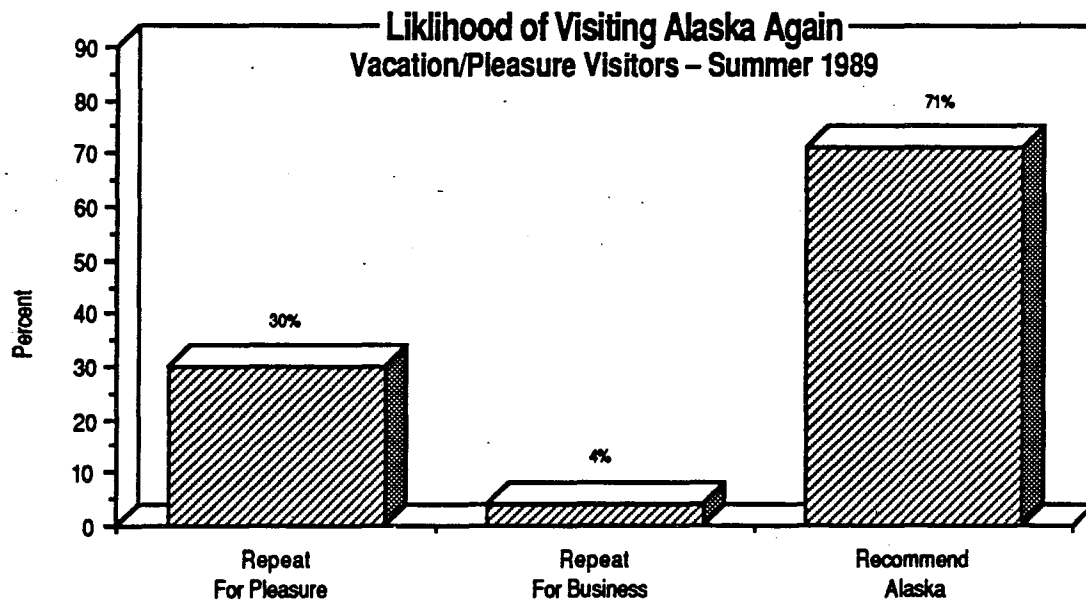
## Likelihood of Visiting Alaska Again

Three of ten Vacation/Pleasure visitors consider themselves "very likely" to visit Alaska again for pleasure. Historically, less than two of ten have actually done so. Whether all those who intend to return will is not certain but the interest in returning is strong among a large share of today's market and in several important market segments. There appears to be little crossover between pleasure and business travel. Only one of 25 Vacation/Pleasure visitors expects to return for business reasons.

Among Vacation/Pleasure groups, Independents are three times (52% of them say very likely) and Inde-Package visitors twice as likely to return for vacation as Package visitors (only 18% very likely to return). Other top prospects for repeat visits are International Air, Highway and Ferry users, all having between 37% and 40% very likely to return in their midst. Surprisingly, in spite of the low ratings they assign, the Japanese are the most likely Overseas group to return (52%). Europeans are more likely than average as are Westerners. Easterners are the least promising domestic market for repeat visits (20%) and the cruiship market ranks lowest among mode markets, with only 17% very likely to return.

Vacation/Pleasure visitors are dedicated recommenders of Alaska to their friends and relatives. Seven of ten rate themselves very likely to recommend Alaska and, as proof of their intentions, even more of them (nineteen of twenty) actually did so after returning home from Alaska. Intent to recommending Alaska was high among all groups but, ironically, Texans intended to brag the most about Alaska.

Graph IV-A-3



## Biggest Misconception Cleared by Alaska Trip

Most visitors have pleasant surprises in store when they come to Alaska. Half of them had a specific misconception cleared up which resulted in Alaska being better than expected, only one in fourteen said Alaska was worse than expected. Another one in six found Alaska different than expected, but neither better nor worse.

Weather was the #1 misconception. Over a third of all Vacation/Pleasure visitors found the weather better than expected. Other Alaska research has revealed that weather perception is the biggest barrier to vacation travel to Alaska. When a full third of those who do choose to go are willing to do so in spite of anticipated poor weather, the magnitude of this barrier is confirmed. Alaska has a growing market in spite of the weather perception problem.

Most likely to have negative weather misconceptions among Vacation/Pleasure visitors are the International Air market (50% thought the weather was better than expected), Germans/Swiss/Austrians, Easterners and the Cruiseship market. Best informed about Alaska's weather are Independents (only 19% pleasantly surprised by the weather) and the Highway and Ferry markets. The Japanese are slightly better informed about the weather than is the overall U.S. domestic market.

Other common misconceptions concerned the appeal of Alaska and its attractions, road conditions (usually better than expected) and prices.

Table IV-A-4

### Biggest Misconception Cleared Up By Visit to Alaska Vacation/Pleasure Visitors - Summer 1989

<b>Better Than Expected</b>	<b>50%</b>
Weather	34
Appeal of Alaska/Attractions	7
Roads	5
Prices/Cost	2
Other	27
<b>Different Than Expected</b>	<b>16%</b>
<b>Worse Than Expected</b>	<b>7%</b>
Appeal of Alaska/Attractions	4
Prices/Cost	1
Roads	1
Facilities/Transportation	1
Weather	1
Other	-



## B Vacation/Pleasure Visitor Travel Patterns

### Entry and Exit Modes

Vacation/Pleasure visitor entry modes differ significantly from those of other visitor types. Business visitors and those Visiting Friends and Relatives enter Alaska mostly by Domestic Air. Vacation/Pleasure visitors use a variety of entry modes with Cruiseship (38%) and Domestic Air (36%) being the most important. The Highway, Ferry and International Air modes also bring in significant numbers of visitors. Vacation/ Pleasure visitor exit patterns nearly mirror their entry patterns. Ferry and Domestic Air modes are slightly more common for exiting the state.

Table IV-B-1

### Entry and Exit Modes (Excludes Seasonal Workers) Vacation/Pleasure Visitors – Summer 1989

Mode	Entering V/P Visitors	Percent	Exiting V/P Visitors	Percent
Domestic Air	131,000	36%	139,800	39%
Cruiseship	137,500	38	127,000	35
Highway/Private Vehicle	57,200	16	53,800	15
Ferry	22,100	6	25,000	7
International Air	12,400	3	12,700	4
Other	—	—	200	—
Non-Response	100	1	1,800	<1
<b>Total</b>	<b>360,300</b>	<b>100%</b>	<b>360,300</b>	<b>100%</b>

## Mode Market Size

Of more use for marketers is data on the total number of Vacation/Pleasure visitors using each mode, whether for entry, exit or both. The numbers in the following table quantify the total mode markets. For example, while 38% of the Vacation/Pleasure market uses a cruiseship to enter Alaska, 56% of the market uses cruiseships for entry, exit or both. Half of the market also uses Domestic Air. The Highway/Personal Vehicle market is actually over 70,000 Vacation/Pleasure visitors, not just the 57,000 entering the state by that mode. Finally, the Ferry market swells to nearly 40,000 Vacation/Pleasure visitors when total mode use is considered, and the total International Air market tops 15,000 Vacation/Pleasure visitors.

Table IV-B-2

### Mode Market Size (Excludes Seasonal Workers) Vacation/Pleasure Visitors - Summer 1989

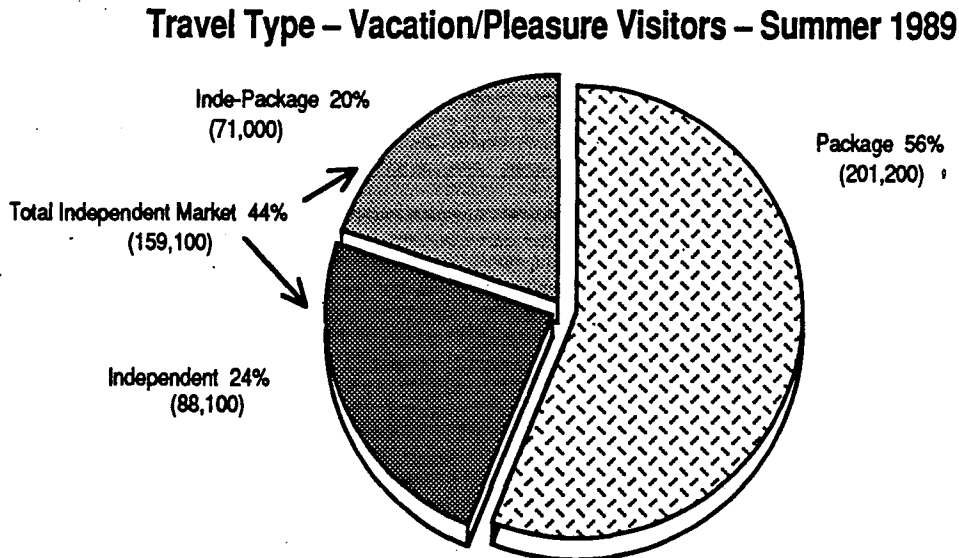
Mode	Entering V/P Visitors Only	Exiting V/P Visitors Only	V/P Visitors Entering and Exiting	Total Mode Markets
Domestic Air	46,700	55,500	84,300	186,500
Cruiseship	51,700	41,200	85,800	178,700
Highway/Private Vehicle	16,900	13,500	40,300	70,700
Ferry	14,600	17,500	7,500	39,600
International Air	2,700	3,000	9,700	15,400

## Travel Type of Vacation/Pleasure Visitors

Vacation/Pleasure travel type is unique among trip purpose groups. All other trip purpose groups are mostly Independent travelers. As a result, more than half of all visitors are Independent travelers. On the other hand, Package visitors are almost all Vacation/Pleasure visitors. This makes more than half (56%) of all Vacation/Pleasure visitors Package visitors, with the balance being Independents. About 45% of Independents are of the Inde-Package variety, meaning they buy sightseeing tours once they arrive in Alaska independently.

Overseas Vacation/Pleasure visitors are mostly (70%) Independent and Inde-Package travel types, while the majority of the domestic Vacation/Pleasure visitors (61%) are on package trips. Easterners and Floridians are almost entirely package visitors, while the Highway, Japanese and British markets consider themselves mostly Independents.

Graph IV-B-1

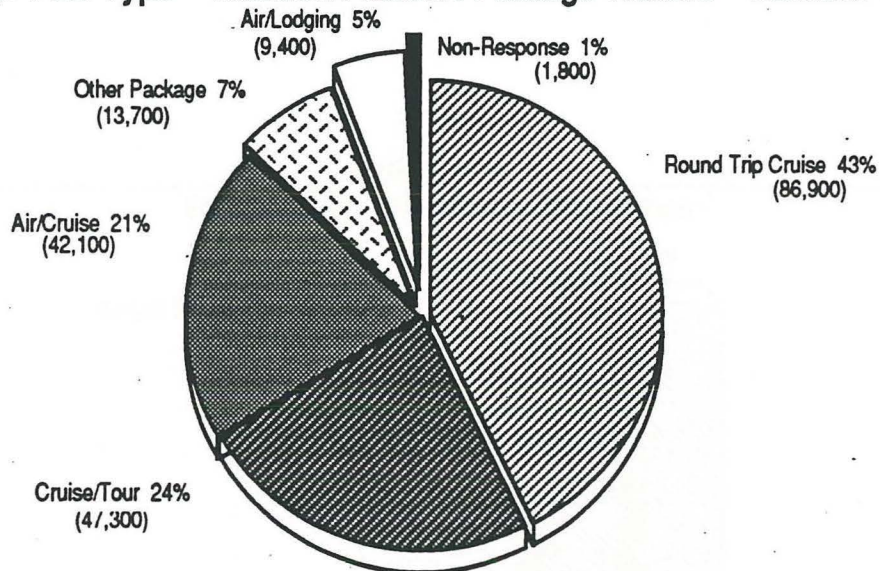


## Package Tour Type for Vacation/Pleasure Visitors

Round trip cruise is still the most common package sold today but it is losing ground to a new trend toward air/cruise packages. In an air/cruise package, the visitor travels one way by cruiseship (usually to Southcentral), stays briefly in the state in not more than one location (usually Anchorage) and flies the other way. Air/Cruises now have about 21% of the market. Cruise/Tours, the premium market for the cruise industry, are 24% of all packages reported by survey respondents. The category of "other" package, which includes some fishing resort packages, adventure tours and ferry tours account of for 7% of the package market and air/lodging combinations, 5%.

Graph IV-B-2

### Package Tour Type – Vacation/Pleasure Package Visitors – Summer 1989



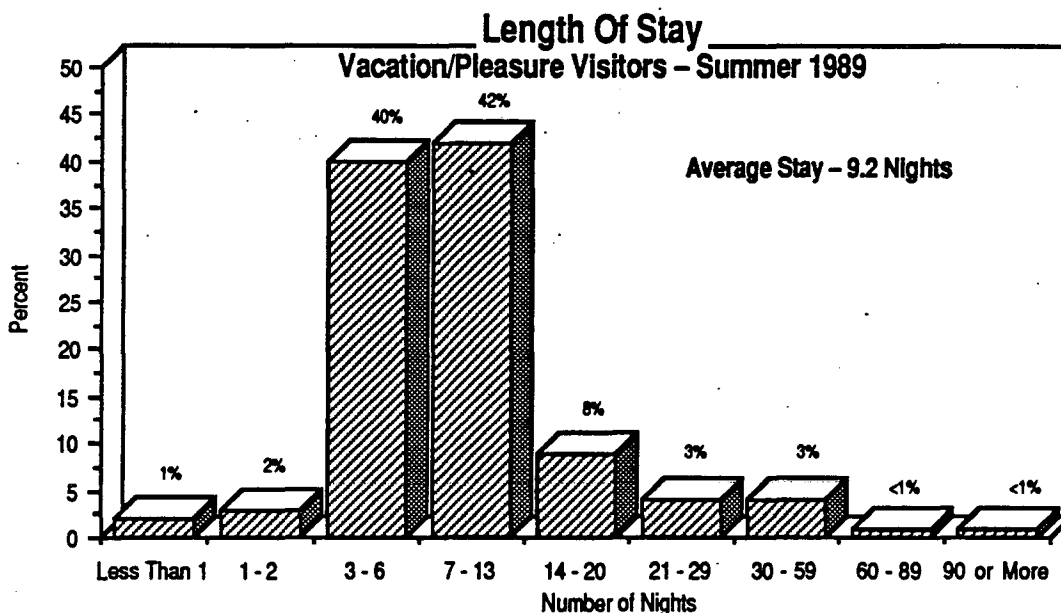
## Length of Stay of Vacation/Pleasure Visitors

Vacation/Pleasure visitors average about nine nights in Alaska, a moderately shorter visit than the all visitor average. Eight of ten stay for between three and thirteen nights, a time frame which includes almost all commonly marketed tour and cruise packages. The largest group (42%) visit the state for one to two weeks. Longer staying visitors, mostly Independents, comprise 15% of the market, about half of them staying for two to three weeks and the balance from three weeks to three months. Few Vacation/Pleasure visitor stay for less than three days.

The trend since 1985 is for moderately shorter Alaska vacations. The 9.2 night average stay is down from the 1985 average of 9.9 for Vacation/Pleasure visitors. Among travel types, Inde-Package visitor stay the longest (13.4 nights) nearly twice as long as Package visitors and three nights longer than Independents. Cruise/Tour visitors average nearly ten nights in Alaska.

The longest staying groups are the Ferry market (16.2 nights), Europeans (13.5), the Highway market (13.2) and the International Air market (13.0).

Graph IV-B-3



## Lodging Type of Vacation/Pleasure Visitors

Cruiseships, not hotels/motels, are the most commonly used lodging type and they are used by half of all Vacation/Pleasure visitors. This surprising statistic reflects the importance of cruiseship use in today's Alaska Vacation/Pleasure market. Slightly fewer visitors (46%) use hotels/motels. Market use of both of these lodging types has declined slightly since 1985, as has private home use. Only 14% of Vacation/Pleasure visitors use a friend or relative's private home on their Alaska trip.

Resort/lodge and bed and breakfast use both have increased significantly since 1985. Nearly one of four Vacation/Pleasure visitors uses a resort or lodge while bed and breakfast places now serve 7% of the market, up from almost no market share. A slightly larger share of the market (20%) now uses RV/campgrounds.

Among Vacation/Pleasure visitors using each lodging type, those using RVs and campgrounds use them most extensively, for 12 nights, reflecting the tendency for a portion of the Highway market to stay for long periods in Alaska. Four years ago, it was those staying in private homes of Alaska friends and relatives who stayed the longest in a single lodging type.

Table IV-B-3

### Lodging Type Vacation/Pleasure Visitors - Summer 1989

Lodging Type	Average # of Nights	Percent of V/P Visitors Using This Lodging	Average Number of V/P Visitors Using
Hotel/Motel	1.8	46%	4.1
Resort/Lodge	0.6	23	2.8
Bed & Breakfast	0.2	7	2.9
Private Home	1.2	14	9.1
RV/Campground	2.3	20	11.8
Cruiseship	2.5	50	5.1
Ferry	0.3	12	2.4
Other	0.5	4	12.9

## **Regions Visited by Vacation/Pleasure Visitors**

Vacation/Pleasure travel patterns differ from the all visitor patterns because they follow the locations of the state's major attractions. Business and VFR travel is based on the locations of the state's population and major industries.

Southeast is the most visited region, capturing nearly three-fourths of the Vacation/Pleasure visitor market. The region gets virtually all of the cruise-related tour market including 87,000 round trip cruise visitors who mostly confine their cruise to Southeast. Southcentral, on the other hand, captures a much higher share of the Independent market and ranks second with nearly two-thirds of the state's total Vacation/Pleasure market.

The Interior/Northern and Denali/McKinley regions host four of ten Alaska Vacation/Pleasure visitors, while the Southwest gets only 6% of the market, though many of them are part of the premium sport fishing resort market.

In terms of market share since 1985, Southcentral has gained more than any other region, jumping from 58% to 64% of all Vacation/Pleasure visitors. Southcentral has gained significant volume due to changes in the package tour market, growth in the International Air market, and from the healthy Independent and Inde-Package market growth. Southeast has lost a few points in market share as this region struggles to recover a larger share of the Independent market. The fact that ferry system capacity has not increased restricts growth for the independent Highway and Ferry markets. Non-competitive air fare structures also limit Southeast Independent growth.

Interior/Northern, like Southeast, has lost some market share (45% down to 40%). Growth in the important Highway market has been limited and Fairbanks only participates in the Cruise/Tour part of the package tour market, while Southcentral, Anchorage in particular, hosts the fastest growing package trend, air/cruise packages.

Denali/McKinley has participated in the total market growth and maintains its share of four of every ten Vacation/Pleasure visitors. Heavy promotion of the park has resulted in both Package and Independent market growth in the region.

Southwest Alaska was hurt by the oil spill in 1989 and lost modest market share. This region's markets are also specialized (high end sport fishing, hunting) and do not grow at the same rate as the total market.

Table IV-B-4

**Regions Visited  
Vacation/Pleasure Visitors – Summer 1989**

Region	Number of V/P Visitors	Percent of Total V/P Visitors
Southeast	258,000	72%
Southcentral	230,900	64
Denali/McKinley	144,700	40
Interior/Northern	139,200	39
Southwest	22,800	6
<b>Total</b>	<b>360,300</b>	<b>100%</b>



## **Communities Visited by Vacation/Pleasure Visitors**

Anchorage replaced Juneau as the community most visited by Vacation/Pleasure visitors. Changing package tour trends (which benefit Anchorage), the strong growth of the Independent market, rapid growth in the Overseas market, and lack of peak season capacity on the ferry system have all contributed to this switch. However, the two communities are almost in a dead heat with 62% and 60% of the market.

Ketchikan, Skagway, Fairbanks, Sitka, Valdez/Prince William Sound and Tok, kept their top ten positions while Palmer went from #9 to #13 and Haines dropped slightly from #10 to #12. Seward rose to #7 from #12, Kenai/Soldotna rose one spot to #10 and Whittier to #11. Glacier Bay and Denali/McKinley each hosted more visitors than all but four communities.

In the Arctic, Nome and Kotzebue Vacation/Pleasure visitor volumes were down moderately from 1985 while Prudhoe Bay and Barrow volumes were up, also moderately.

Table IV-B-5

## Communities and Places Visited Vacation/Pleasure Visitors – Summer 1989

	Total Number of V/P Visitors	Percent of Total V/P Visitors to Community or Place
<b>Total Vacation/ Pleasure Visitors</b>	<b>360,300</b>	<b>100%</b>
<b>Community</b>		
Anchorage	222,700	62
Juneau	216,500	60
Ketchikan	198,700	55
Skagway	174,100	48
Glacier Bay	157,500	44
Denali/McKinley	144,700	40
Fairbanks	121,800	34
Sitka	117,900	33
Seward	89,800	25
Valdez/Prince William Sound	78,000	22
Tok	74,900	21
Kenai/Soldotna	69,600	19
Whittier	69,100	19
Haines	64,700	18
Palmer	60,700	17
Homer	60,300	17
Wasilla	46,300	13
Glennallen	45,800	13
Wrangell	36,400	10
Other Kenai Peninsula Communities	34,400	10
Petersburg	25,100	7
King Salmon	11,200	3
Cordova	9,100	3
Kotzebue	7,900	2
Nome	7,700	2
Prudhoe Bay	5,500	2
Kodiak	4,300	1
Barrow	3,700	1
Katmai	3,400	1
Dillingham	2,300	1
Iliamna	2,100	1
Bethel	1,300	<1
Other Interior/Northern Locations	16,600	5
Other Southcentral Locations	11,600	3
Other Southwest Locations	6,500	2
Other Southeast Locations	6,300	2

Table IV-B-6

**Communities and Places Visited  
By Region  
Vacation/Pleasure Visitors - Summer 1989**

	Number of V/P Visitors	% Of V/P Visitors to AK.	% of V/P Visitors To Region
<b>Southeast</b>	<b>258,000</b>	<b>72%</b>	<b>100%</b>
Juneau	216,500	60	84
Ketchikan	198,700	55	77
Skagway	174,100	48	67
Glacier Bay	157,500	44	61
Sitka	117,900	33	46
Haines	64,700	18	25
Wrangell	36,400	10	14
Petersburg	25,100	7	10
Other Southeast Locations	6,300	2	2
<b>Southcentral</b>	<b>230,900</b>	<b>64%</b>	<b>100%</b>
Anchorage	222,700	63	96
Seward	89,800	25	39
Valdez/Prince William Sound	78,000	22	34
Kenai/Soldotna	69,600	20	30
Whittier	69,100	19	30
Palmer	60,700	17	26
Homer	60,300	17	26
Wasilla	46,300	13	20
Glennallen	45,800	13	20
Other Kenai Peninsula Communities	34,400	10	15
Cordova	9,100	3	4
Other Southcentral Locations	11,600	3	5
<b>Interior/Northern</b>	<b>139,200</b>	<b>39%</b>	<b>100%</b>
Fairbanks	121,800	34	88
Tok	74,900	21	54
Kotzebue	7,900	2	6
Nome	7,700	2	6
Prudhoe Bay	5,500	2	4
Barrow	3,700	1	3
Other Interior/Northern Locations	16,600	5	12
<b>Southwest</b>	<b>22,800</b>	<b>6%</b>	<b>100%</b>
King Salmon	11,200	3	49
Kodiak	4,300	1	19
Katmai	3,400	1	15
Dillingham	2,300	1	10
Iliamna	2,100	1	9
Bethel	1,300	1<	6
Other Southwest Locations	6,500	2	29
<b>Denali/McKinley</b>	<b>144,700</b>	<b>40%</b>	<b>100%</b>

## Attractions Visited by Vacation/Pleasure Visitors

The top ten Vacation/Pleasure visitors attractions remained essentially the same - Inside Passage, Mendenhall Glacier, Glacier Bay, Skagway's Historic Gold Rush District, Portage Glacier, Denali/McKinley, Ketchikan Totems, Anchorage Museum of History and Fine Art, the University of Alaska in Fairbanks, and the Transalaska Pipeline, which is in a virtual tie with Sitka's Russian Church/Dancers. Their order has shifted slightly since 1985, due in part to strong growth in the cruise market which has benefitted Southeast Attractions.

Other top twenty attractions include several which were not listed in the 1985 survey. These include the Alaska State Museum in Juneau and Sitka National Historical Park (tied at #12 , (the University of Alaska Museum, the Kenai River and Columbia Glacier (tied at #14) and Dog Mushing Attractions (primarily the demonstration attraction at Denali) and Alyeska Ski Resort. Attractions which repeated in the top twenty since 1985 are Prince William Sound, Chena River Trips, Valdez Pipeline Terminal and Chugach State Park. Alaskaland fell several places to #19 among Vacation/Pleasure visitor attractions.

Tables IV-B-7 and IV-B-8 detail visits to attractions for the entire state and by region, respectively.

Table IV-B-7

## Attractions Visited Statewide Vacation/Pleasure Visitors – Summer 1989

Attraction	Number of V/P Visitors To Attraction	% of V/P Visitors To Attraction
<b>Total V/P Visitors</b>	<b>360,300</b>	<b>100%</b>
Inside Passage	203,800	57
Mendenhall Glacier	178,000	49
Glacier Bay	165,100	46
Skagway's Historic Gold Rush District	157,400	44
Ketchikan Totems	154,800	43
Portage Glacier	145,500	40
Denali/McKinley	144,700	40
Anchorage Museum of History & Art	103,900	29
University of Alaska - Fairbanks	100,200	28
University of Alaska Museum	75,200	21
Large Animal Research Station	39,000	11
Agricultural & Forestry (Experimental Station Farm)	26,500	7
Geophysical Institute	3,400	1
Transalaska Pipeline	93,300	26
Sitka's Russian Church/Dancers	92,900	26
Alaska State Museum	80,000	22
Sitka National Historic Park	80,000	22
Columbia Glacier	73,900	21
Kenai River	73,900	21
Prince William Sound	64,700	18
Dog Mushing Attractions	64,000	18
Chena River Trips	59,900	17
Valdez Pipeline Terminal	55,400	15
Chugach State Park	53,100	15
Alyeska Ski Resort	53,100	15
Alaskaland	52,900	15
Gold Panning Dredges & Saloons	51,100	14
Resurrection Bay	48,500	13
Kenai National Wildlife Refuge	43,900	12
Chilkat Bald Eagle Preserve	36,100	10

Table IV-B-7, Con't

## Attractions Visited Statewide Vacation Pleasure Visitors – Summer 1989

Attraction	Number of V/P Visitors To Attraction	% of V/P Visitors To Attraction
Lake Hood Air Harbor	39,300	11
Matanuska Glacier	36,900	10
College Fjord	32,300	9
St. Nicholas Russian Orthodox Church and Native Spirit Houses	30,000	8
Misty Fjords National Monument	28,400	8
Potter Point State Game Refuge	27,700	8
Kachemak Bay	27,700	8
Kenai Fjords National Monument	25,400	7
Tracy Arm	23,200	6
Crow Creek Mine	20,800	6
Hatcher Pass Recreation Area	16,200	4
Hot Springs	12,100	3
Pipeline Haul Road	9,300	3
Independence Mine State Historic Park	8,900	2
Alaska Historical and Transportation Museum	8,900	2
Nome - Gold Rush History	8,900	2
Kotzebue - Eskimo Culture	8,600	2
Katmai National Park	5,500	2
Prudhoe Bay Oil Fields	4,900	1
Eaglecrest Ski Area	4,700	1
Kodiak Russian Orthodox Church	3,100	1
Farthest Northern Point in North America (Barrow)	2,700	1
Wood River - Tikchik State Park	1,900	1
Brooks Range	1,700	1
Fort Abercrombie	1,700	1
Arctic National Wildlife Refuge	1,700	1
Kodiak National Wildlife Refuge	1,400	<1
Lake Clark National Park	500	<1
Gates of the Arctic National Park	400	<1
Baranof Museum	400	<1
Round Island	300	<1%

Table IV-B-8

## Attractions Visited By Region Vacation/Pleasure Visitors - Summer 1989

Regional Attraction	Number of V/P Visitors To Region/Attraction	Percent of V/P Visitors To Alaska	Percent of V/P Visitors To Region
<b>Total Visitors</b>	<b>360,300</b>	<b>100%</b>	
<b>Southeast</b>	<b>258,000</b>	<b>72%</b>	<b>100%</b>
Inside Passage	203,800	57	79
Mendenhall Glacier	178,000	49	69
Glacier Bay	165,100	46	64
Skagway's Historic Gold Rush District	157,400	44	61
Ketchikan Totems	154,800	43	60
Sitka's Russian Church/Dancers	92,900	26	36
Alaska State Museum	80,000	22	31
Sitka National Historic Park	80,000	22	31
Chilkat Bald Eagle Preserve	36,100	10	14
Misty Fjords National Monument	28,400	8	11
Tracy Arm	23,200	6	9
Eaglecrest Ski Area	4,700	1	2
<b>Southcentral</b>	<b>230,900</b>	<b>64%</b>	<b>100%</b>
<b>Anchorage Area</b>	<b>222,700</b>	<b>62%</b>	<b>96%</b>
Portage Glacier	145,500	40	63
Anchorage Museum of History & Art	103,900	29	45
Chugach State Park	53,100	15	23
Alyeska Ski Resort	53,100	15	23
Lake Hood Air Harbor	39,300	11	17
St. Nicholas Russian Orthodox Church and Native Spirit Houses	30,000	8	13
Potter Point State Game Refuge	27,700	8	12
Crow Creek Mine	20,800	6	9
<b>Kenai Peninsula</b>	<b>99,300</b>	<b>28</b>	<b>43</b>
Kenai River	73,900	21	32
Resurrection Bay	48,500	13	21
Kenai National Wildlife Refuge	43,900	12	19
Kachemak Bay	27,700	8	12
Kenai Fjords National Monument	25,400	7	11
<b>Prince William Sound Area</b>	<b>99,300</b>	<b>28</b>	<b>43</b>
Columbia Glacier	73,900	21	32
Prince William Sound	64,700	18	28
Valdez Pipeline Terminal	55,400	15	24
College Fjord	32,300	9	14
<b>Matanuska-Susitna Area</b>	<b>48,500</b>	<b>13</b>	<b>21</b>
Matanuska Glacier	36,900	10	16
Hatcher Pass Recreation Area	16,200	4	7
Independence Mine State Historic Park	8,900	2	4
Alaska Historical and Transportation Museum	8,900	2	4

Table IV-B-8, Con't

## Attractions Visited By Region Vacation/Pleasure Visitors – Summer 1989

Regional Attraction	Number of V/P Visitors To Region/Attraction	Percent of V/P Visitors To Alaska	Percent of V/P Visitors To Region
<b>Interior/Northern</b>	<b>139,200</b>	<b>39%</b>	<b>100%</b>
<b>Fairbanks Area</b>	<b>121,800</b>	<b>34%</b>	<b>88%</b>
University of Alaska - Fairbanks	100,200	28	72
University of Alaska Museum	75,200	21	54
Large Animal Research Station	39,000	11	28
Agricultural & Forestry (Experimental Station Farm)	26,500	7	19
Geophysical Institute	3,400	1	2
Transalaska Pipeline	93,300	26	67
Dog Mushing Attractions	64,000	18	46
Chena River Trips	59,900	17	43
Alaskaland	52,900	15	38
Gold Panning Dredges & Saloons	51,500	14	37
Hot Springs	12,100	3	9
<b>Other Northern Areas</b>	<b>30,600</b>	<b>8%</b>	<b>22%</b>
Pipeline Haul Road	9,300	3	7
Nome - Gold Rush History	8,900	2	6
Kotzebue - Eskimo Culture	8,600	2	6
Prudhoe Bay Oil Fields	4,900	1	4
Farthest Northern Point in No. America (Barrow)	2,700	1	2
Brooks Range	1,800	<1	1
Arctic National Wildlife Refuge	1,700	<1	1
Gates of the Arctic National Park	400	<1	<1
<b>Southwest</b>	<b>22,800</b>	<b>6%</b>	<b>100%</b>
Katmai National Park	5,500	1	24
Kodiak Russian Orthodox Church	3,100	1	14
Wood River - Tikchik State Park	1,900	<1	8
Fort Abercrombie	1,700	<1	7
Kodiak National Wildlife Refuge	1,400	<1	6
Lake Clark National Park	500	<1	2
Baranof Museum	400	<1	2
Round Island	300	<1	1
<b>Denali/McKinley</b>	<b>144,700</b>	<b>40%</b>	<b>100%</b>



## **Comparative Regional Use Patterns of Vacation/Pleasure Visitors**

Vacation/Pleasure visitor use of 32 types of accommodations, services and activities in each of the five regions is detailed in Table IV-B-9.

Southeast Vacation/Pleasure visitors use cruiseships and the ferry system more than other regional visitors. They are also the state's most active shoppers, local sightseeing tour takers, users of visitor information centers and of cultural attractions/museums. Much of this use is due to the organization of the Southeast industry around servicing the cruiseship visitor. For example, local sightseeing tours and shopping districts are located and organized for maximum use by these visitors. On the other hand, Southeast Vacation/Pleasure visitors are light users of hotels/motels, restaurants/nightlife, rental vehicles, instate air and the train.

Southcentral Vacation/Pleasure visitors use hotels/motels more than other regional visitor groups. A surprising 10% used a cruiseship in the region as well. Southcentral is also the major region for bed and breakfast use. This regional visitor group is by far the heaviest users of rental cars and RVs and are second only to Denali/McKinley visitors in train use. The region's Vacation/Pleasure visitors lead the state in restaurant/nightlife use and participation and are second to Southeast visitors in local tour taking, shopping, viewing of cultural attractions/museums and use of visitor information centers. Southcentral visitors also fish more than any other group except Southwest visitors, where fishing is the main attraction.

Interior/Northern visitors are second in use of hotels/motels and tie for first in use of RV/campgrounds. Other forms of lodging are little used in this region. For instate commercial transportation, visitors to this region favor the motorcoach and train as well as rental vehicles. Interior/Northern Vacation/Pleasure visitors are frequent users of restaurants/nightlife, shopping, visitor information centers and cultural attractions/museums. They take almost as many local tours as do Southcentral visitors, especially day cruises and city tours. Interior/Northern visitors are not as active in the outdoors in term of hiking, rafting and wildlife viewing, for example.

The Southwest Vacation/Pleasure visitor leads all regional groups in most outdoor activities including freshwater fishing (65% of them do it), hiking, hunting, canoeing/kayaking and are second in wildlife viewing and bird watching (mostly of the casual variety). Not surprisingly, their primary form of lodging is resorts/lodges, followed by campgrounds. Their instate transportation is limited mostly to air. Southwest visitors purchase few local tours and most of those are flightseeing. They are also the least likely of all regional groups to utilize urban amenities of shopping, restaurants/nightlife, visitor information centers and cultural attractions/museums.

The Denali/McKinley Vacation/Pleasure visitor prefers RV/campgrounds and resorts/lodges for lodging and are the state's heaviest users of the railroad and motorcoaches (for the Denali Park tour). Their dominant activities are wildlife viewing and bird watching and they hike more than other regional groups except those in the Southwest. Rafting is also popular in this region. Most of this group uses visitor information centers and half of them shop during their typically short stay.

Table IV-B-9

**Comparative Regional Use Patterns  
Accommodations, Services, and Activities  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Regional Visitors Using)**

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
<b>Lodging</b>					
Hotel/Motel	18%	52%	47%	5%	21%
Resort/Lodge	3	4	1	55	37
Bed & Breakfast	2	7	2	1	-
RV/Campground	10	21	30	15	30
Cruiseship	55	10	-	-	-
Ferry	12	2	-	1	-
<b>Transportation</b>					
Motorcoach	39	25	35	-	60
Train	2	21	20	-	33
Air	4	7	9	84	2
Cruiseship	49	9	-	-	-
Ferry	16	5	-	1	-
Rental Car	5	18	11	3	11
Rental RV	-	3	1	-	2
<b>Restaurants/Nightlife</b>	51	65	62	36	55
<b>Shopping</b>	85	72	65	22	51
<b>Visitor Information Centers</b>	68	59	55	21	59
<b>Sightseeing</b>					
Flightseeing	30	9	7	14	7
Day Cruises	30	21	23	4	8
City Tours	53	30	32	5	2
Other Tours	38	24	17	12	54
<b>Cultural Attractions/ Museums</b>					
	62	47	45	8	18
<b>Activities</b>					
Canoeing/Kayaking	5	3	-	7	2
Rafting	11	4	2	7	13
Hiking	14	16	10	28	24
Freshwater Fishing	7	20	4	65	3
Saltwater Fishing	10	12	1	17	1
Wildlife Viewing	44	40	31	63	68
Bird Watching	30	29	22	38	40
Hunting	-	1	1	12	-
Dogsledding	-	-	<1	1	1

## **C Trip Planning of Vacation/Pleasure Visitors**

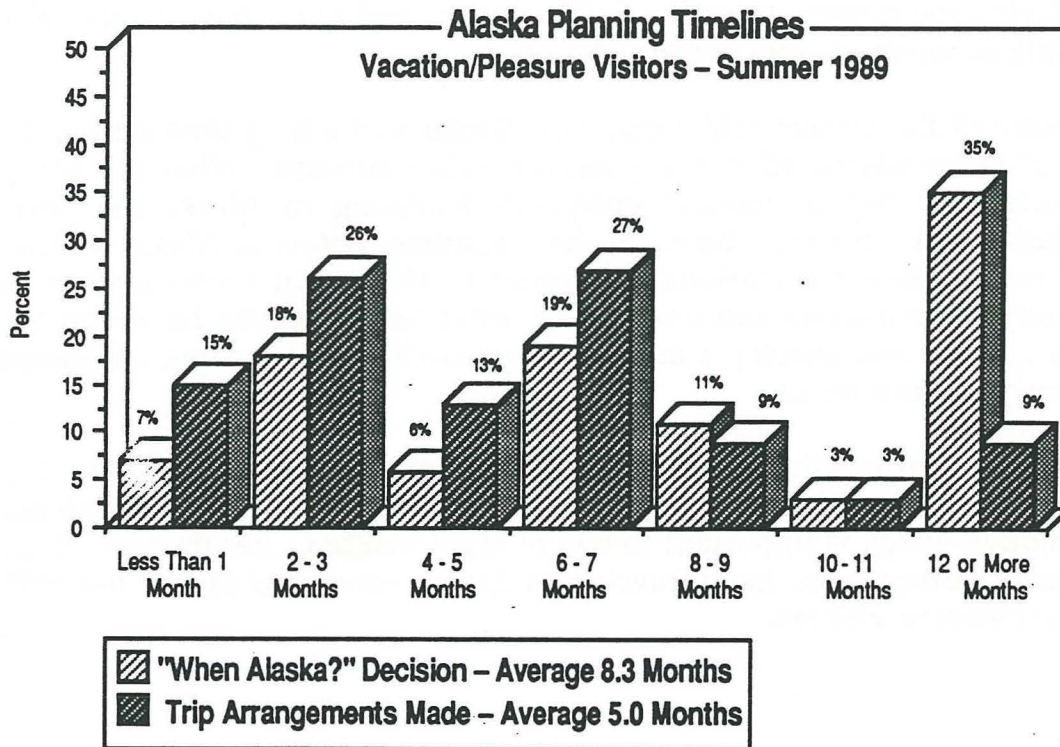
### **Alaska Trip Planning Timelines**

Vacation/Pleasure visitors tend to make their Alaska trip timing decision and their travel arrangements moderately earlier than other visitor types. Alaska trip timing means when the visitor decided on the month and year of the trip, not when they first decided to go to Alaska, which is often years in advance. Most visitors are either very long range or short range planners. More than a third make their trip timing decision a year or more in advance but at the other end of the time spectrum, one-fourth decided to go within three months of departure. Another one-fourth decide four to seven months in advance.

The average Alaska decision timing does vary much among visitor groups. Package and Independent markets both average about eight and one-half months while Independent Package visitors decide a bit later, with less than eight months to go. Decision time averages for Overseas and domestic markets are about the same, 8.4 to 8.6 months.

Nine of ten visitors don't make their trip arrangements until nine months or less before departure. Actual booking peaks twice, at 6-7 months and again at 2-3 months before departure. Over one-fourth of the market makes their arrangements during each of these periods. The last month before departure is also a very busy one with 15% of the entire market making their arrangements within 30 days. Most of these are Independents and, surprisingly, the International Air market. Only 8% of the Package market books in the last 30 days.

Graph IV-C-1



## **Alaska Trip Timing Decision Criteria for Vacation/Pleasure Visitors**

Why did visitors choose to go to Alaska this particular year and month? Four of ten cited personal reasons with the chance to travel with friends and relatives and the more vague "time available" being the leading reasons for their timing decision. A surprising five percent of the market timed their trip to coincide with honeymoons or anniversaries. Having the money, traveling with a group, and age related factors also influence the timing of when visitors come to Alaska.

A full fifteen percent of the market said coming to Alaska was a long time desire, the "always wanted to" factor identified in many Alaska visitor surveys. What this really means is a significant group of visitors postpones traveling to Alaska for years following their initial decision to go there. In the meantime, potential Alaska visitors visit most other competitive destinations, according to their own travel history as shown in this study. If marketers can understand what keeps Alaska far down the priority ladder for so long, and develop a marketing approach to address this, additional Alaska market growth would result.

The attractions and appeal of Alaska also play an important role in the trip timing decision, particularly fishing. Visiting friends and relatives living in Alaska is another timing decision motive which is important to one of eight visitors. Recommendations by others, presumably others who have traveled to Alaska converted one of ten 1989 summer Vacation/Pleasure visitors.

Table IV-C-1

## 1989 Alaska Trip Decision Criteria Vacation/Pleasure Visitors – Summer 1989

	Main Reason for 1989 Alaska Trip	Reason for Alaska vs. Other Destinations Considered*
1. Personal Reasons	40%	28%
Chance to Travel with Friends and Relatives	8	4
Time Available	8	12
Just Felt Like It	6	4
Honeymoon/Anniversary	5	—
Finally Had Money	3	—
Travel Group	3	3
Getting Old/Failing Health	2	—
Gift	1	1
Retired Now	2	—
Never Been	1	4
Other	<1	—
2. Long Time Desire	15	—
3. Attractions/Appeal of Alaska	13	12
Fishing	7	5
Natural Beauty	4	6
Wildlife	1	1
Other	1	5
4. Visit Friends and Relatives	12	8
5. Recommended By Others	10	3
6. Business	—	8
7. Advertising/Promotion	5	—
8. Price/Discount Considerations	4	10
Air or Cruise Reduced Price	3	3
Air Mileage Available	1	—
9. Wanted to Cruise	5	2
10. Trip Extension	3	1
11. Curiosity	2	—
12. Cool Weather	2	8
13. Visit All 50 States	1	8
14. Other	3	17

\* Of those who chose Alaska vs. other destinations considered.

## Choosing Alaska Over Other Destinations

Why does Alaska win when Vacation/Pleasure visitors are considering going to other destinations as well? The attractions and appeal of Alaska (12%), having the time available (12%), and price or discount considerations (10%) are the three leading reason for Alaska competing successfully against its major competitors – principally Europe, Canada, Mexico, Hawaii and Australia/New Zealand, among others. Cool weather, an apparent liability turned asset, and the desire to visit all 50 states are surprise motives for Alaska as a successful competitor.

Successful marketing messages could address the perception that visiting Alaska takes lots of time, emphasize value and reasonable cost, address the weather as an asset, and capitalize on the part of the market that wants 50 states on their destination checklist.

One in four Alaska Vacation/Pleasure visitors considers other destinations before choosing Alaska. Three of four have already decided Alaska is the place. Those most likely to be considering other places before choosing Alaska are Europeans, Independents and Southerners.

## Competing with Specific Destinations

When Alaska Vacation/Pleasure visitors choose Alaska from among competing places, it is foreign countries, not domestic destinations, which are Alaska's major competitors. Alaska's leading competitor for Vacation/Pleasure business is Europe. When Alaska wins this competition, the major reasons are family related, trip timing, previous visits to Alaska (repeaters are more likely to choose Alaska over Europe), cost (Europe has become more expensive in recent years) and a latent issue with all foreign travel, security.

A consistent reason, though not the only one for choosing Alaska, is cost. Cost was mentioned as a factor in Alaska's favor against its top six competitors. No other factor was mentioned as often. Cool weather is important when visitors choose Alaska over the Caribbean, Mexico and California, but not Hawaii, which benefits from the image of cooling trade winds. Family related factors and traveling with friends and relatives helped Alaska against Australia/New Zealand, the Caribbean, California and the Pacific Northwest.

Table IV-C-2

### Why Visitors Chose Alaska Over A Considered Destination Vacation/Pleasure Visitors – Summer 1989

Considered Destination	Reason for Choosing Alaska
1. Europe	Family Related, Trip Timing, Previous Visit, Cost, Security Factors
2. Canada	Business, Cost, Never Been
3. Mexico	Cost, Fishing, Cool Weather
4. Hawaii	Trip Timing, Natural Beauty, Cost
5. Australia/New Zealand	Cost, Trip Timing, Travel with Friends/Family
6. Caribbean	Natural Beauty, Cool Weather, Family Related, Cost
7. California	Family Related, Cool Weather, Never Been
8. New England	Business, Trip Timing
9. China/Hong Kong/Taiwan	Cost, Trip Timing, Security Factors
10. Pacific Northwest	Never Been, Business, Travel with Friends/Family



## **Travel History and Future Preferences of Alaska Vacation/Pleasure Visitors**

This section considers the travel history and future travel plans of all Vacation/Pleasure visitors, whether they were deciding among competing destinations or had long since set their mind on Alaska. Their five year travel history shows Europe as the favorite (35% had traveled there for vacation in the past five years and one of five named Europe as their last long distance vacation destination). Other destinations popular in the past five years are, in order, Canada, California, Hawaii, Florida, Mexico, the Midwest, Caribbean and New England. Australia/New Zealand had been visited by one of eleven Alaska visitors. This list has more domestic destinations among the top selections than the previous list of direct competitors. Alaska Vacation/Pleasure visitors are well traveled, both domestically and internationally, before coming to Alaska. The conclusion is that many other destinations come first before Alaska.

Visitors were asked where they would prefer to go and then where they were likely to go for their next vacation. This is the dream vs. reality check. Europe leads the way in both categories but Alaska is a surprising #2. Sixteen percent would like Alaska for their next vacation while 10% think it will be. The largest discrepancy between dreams and reality involves Australia/New Zealand. One of eight want to go there on their next vacation, only one in fifty really thinks they will. Conversely, few visitors prefer to go to Florida or California but two to three times as many say that is where they are most likely to go.

Table IV-C-3

**Travel History and Future Preferences of Alaska Visitors  
Vacation/Pleasure Visitors – Summer 1989**

<b>Destination</b>	<b>Last 2,000+ Miles</b>	<b>Past Five Years</b>	<b>Others Considered for 1989</b>	<b>Preferred Next Vacation</b>	<b>Probable Next Vacation</b>
<b>Europe</b>	<b>19%</b>	<b>35%</b>	<b>5%</b>	<b>22%</b>	<b>16%</b>
Great Britain	6	12	1	4	4
West Germany	2	5	<1	1	2
<b>Pacific Coast States</b>	<b>21</b>	<b>50</b>	<b>5</b>	<b>12</b>	<b>16</b>
Hawaii	12	24	3	9	9
California	7	25	1	2	5
Washington/Oregon	2	15	<1	<1	2
<b>Canada</b>	<b>8</b>	<b>29</b>	<b>5</b>	<b>7</b>	<b>8</b>
British Columbia	1	8	1	<1	1
<b>South Atlantic States</b>	<b>5</b>	<b>29</b>	<b>&lt;1</b>	<b>3</b>	<b>10</b>
Florida	4	22	<1	2	7
Washington, D.C.	<1	4	<1	<1	1
<b>Mexico</b>	<b>6</b>	<b>16</b>	<b>2</b>	<b>4</b>	<b>4</b>
<b>Mountain States</b>	<b>5</b>	<b>27</b>	<b>2</b>	<b>4</b>	<b>9</b>
Arizona	2	9	<1	2	2
Nevada	1	9	<1	1	1
<b>Caribbean</b>	<b>5</b>	<b>13</b>	<b>1</b>	<b>2</b>	<b>4</b>
<b>New England</b>	<b>3</b>	<b>13</b>	<b>1</b>	<b>2</b>	<b>3</b>
Massachusetts	1	4	<1	<1	<1
<b>Midwest States</b>	<b>2</b>	<b>14</b>	<b>&lt;1</b>	<b>&lt;1</b>	<b>1</b>
<b>Alaska</b>	<b>2</b>	<b>4</b>	<b>—</b>	<b>16</b>	<b>10</b>
<b>Australia/New Zealand</b>	<b>3</b>	<b>9</b>	<b>2</b>	<b>13</b>	<b>2</b>
<b>China/Hong Kong/Taiwan</b>	<b>3</b>	<b>6</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Japan/Korea</b>	<b>1</b>	<b>4</b>	<b>&lt;1</b>	<b>&lt;1</b>	<b>&lt;1</b>
<b>India/S.E. Asia</b>	<b>&lt;1</b>	<b>5</b>	<b>&lt;1</b>	<b>1</b>	<b>&lt;1</b>
<b>South Pacific</b>	<b>1</b>	<b>3</b>	<b>&lt;1</b>	<b>1</b>	<b>1</b>

## Trip Information Sources for Vacation/Pleasure Visitors

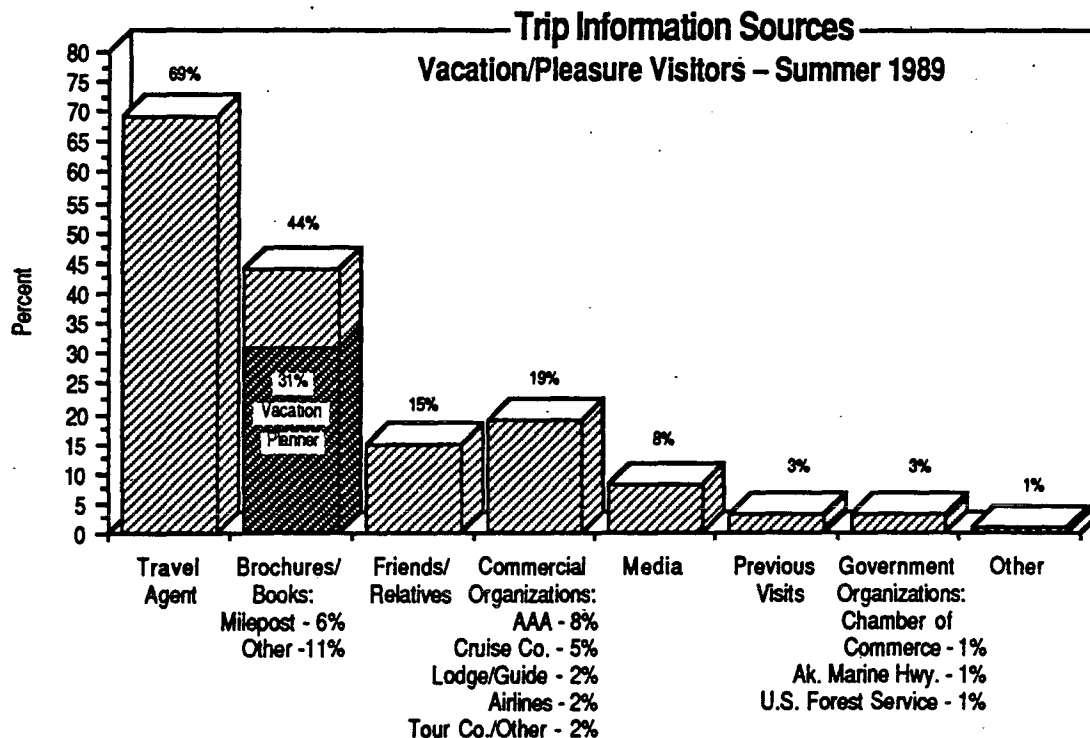
Vacation/Pleasure Visitors are more likely than average visitors to use travel agents, brochures/books, the *Official State Vacation Planner*, media and government organizations for sources of trip planning information. They are less likely to rely on friends and relatives or on previous visits.

The *Official State Vacation Planner* is the most important single source of published information for Vacation/Pleasure Visitors, with nearly a third using that publication. Though more visitors use travel agents, they use them for a variety of purposes and receive many different publications from them. Most likely to use the Planner are Inde-Package visitors, the Ferry and Highway markets (all between 46% and 48%) and Midwesterners (38%). Among package visitors, Cruise/Tour visitors are most likely to use the Planner (34%). Overseas visitors, on the other hand, are much more likely than Domestic visitors to use other books (40% use them) for Alaska trip information.

Travel agent use varies among visitor groups. Almost all Package visitors use them, while four in ten Independents and Inde-Package Vacation/Pleasure Visitors do. A higher proportion of Overseas than Domestic Vacation/Pleasure Visitors use travel agents (79% vs 70%), except the Japanese, only 61% of whom use travel agents.

Independents use a much wider variety of information sources than Package visitors, who rely mostly on travel agents. The leading commercial organization is the AAA (9% of the total). The media provided information for one of twelve Vacation/Pleasure Visitors.

Graph IV-C-2



## **Purchase of Alaska Trip Planning Materials**

Commercial trip planning material is important for Vacation/Pleasure Visitors. Six of ten spent money for Alaska trip planning materials. Those most willing to spend money to plan their trip are the Inde-Package market, Europeans, the Ferry and Highway markets and visitors to the Denali/McKinley region. Between 79% and 73% of Vacation/Pleasure Visitors in these groups purchased Alaska trip planning material. Germans/Swiss/Austrians were the top group with 85% buying.

## **Requesting the Alaska Official State Vacation Planner**

Responses to this question closely parallel those to a previous question on use of travel planning information. Thirty-two percent of all Vacation/Pleasure Visitors sent for the Planner. About half of Inde-Package visitors, the Ferry and Highway markets, and visitors to the Denali/McKinley and Interior/Northern regions ordered the Planner. Oddly, more than twice the percentage of Cruise/Tour visitors ordered it compared to their round trip cruise shipmates. Perhaps the first group is more interested in Alaska while the second is more interested in taking a cruise. The Overseas market (7% order it), except for the British (25%), is unlikely to order the Planner, almost certainly due to language considerations.

## **Receipt of Unsolicited Brochures on Alaska**

In spite of the availability of the State mailing list, most Vacation/Pleasure Visitors (four out of five) do not receive unsolicited brochures. Those who do receive them are deluged with an average of nearly 14 brochures. Clearly, most follow-up marketers are competing for the same prospects, leaving most Alaska Vacation/Pleasure Visitors untouched by their marketing efforts. More refined use of the State's lists and better prior identification of prime prospects would help the industry in their marketing. Favorite targets for brochure mailings are the Japanese (45% received them, averaging an astounding 37 brochures), Easterners, the Inde-Package market and the Ferry market. Most neglected (and/or difficult to identify and reach) are Canadians (only 4% received unsolicited brochures), Independents and Europeans.

## **Readership of Special Newspaper Travel Sections on Alaska**

Two of three Vacation/Pleasure Visitors and at least the majority of every visitor group reads special travel sections on Alaska. Even half of Overseas visitors read them prior to their Alaska trip. The most voracious readers were the air/cruise market, Easterners and Vacation/Pleasure Visitors from Australia/New Zealand. Clearly, newspapers are one of the most important sources of information for Vacation/Pleasure Visitors.

## **Frequent Flyer Program Use**

Vacation/Pleasure Visitors were asked, "If you entered and/or left Alaska by air, did you or anyone in your party use frequent flyer mileage to come to Alaska?". Twenty-eight percent of the parties using air for entry and/or exit did use frequent flyer mileage for at least some part of their Alaska trip. Since 52% of the Vacation/Pleasure Visitor market uses domestic air, then 15% of the total use frequent flyer mileage to Alaska. An average of two people per party used frequent flyer mileage.

Among users of air travel, the Inde-Package market, Southerners (especially Floridians and Texans), and those who combine ferry and air are the heaviest users. One in five Package tour Vacation/Pleasure Visitors who use air also uses frequent flyer mileage.

## **Impacts of the Exxon Valdez Oil Spill on Trip Planning of Vacation/Pleasure Visitors**

The oil spill affected the Alaska trip planning of 15% of Vacation/Pleasure Visitors. However, this varied by visitor group. Most affected were Europeans, especially the premium German/Swiss/Austrian market, 29% of whom had their plans affected. Next were the Inde-Package and the International Air Vacation/Pleasure Visitors markets (both 26%). Also, visitors to Southwest (21%) and Interior/Northern (20%) were moderately more affected than visitors to other Alaska regions. Least affected were the Cruiseship and overall Package tour market (10% and 11%, respectively).

The most common change of plans was to avoid the spill area and those most likely to avoid the area were Germans/Swiss/Austrians (76% of those whose plans were affected), the Ferry market (85%) and the Inde-Package market (69%).

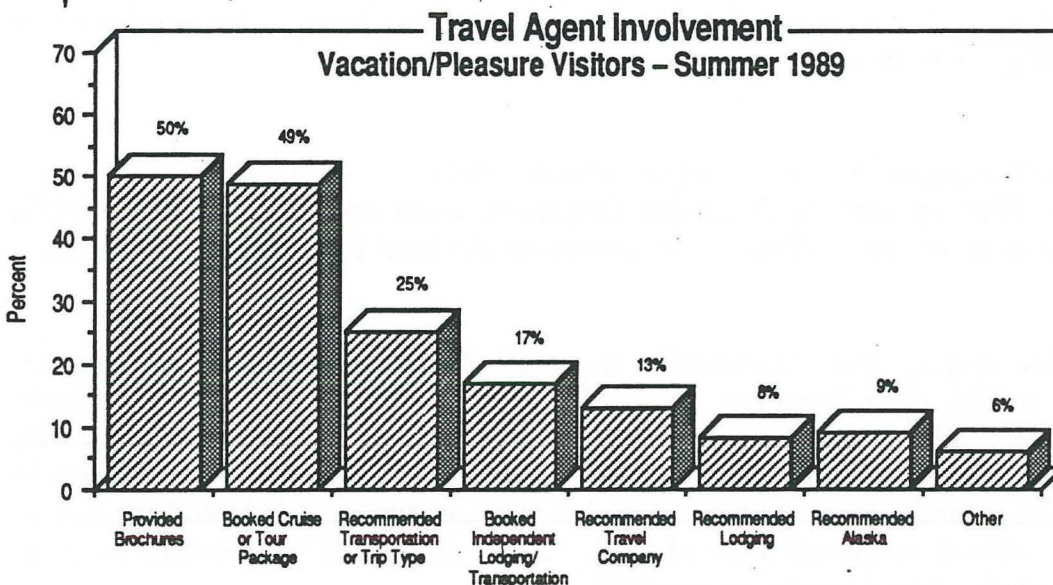
## Travel Agent Involvement in Vacation/Pleasure Visitor Trip Planning

Use of travel agents by Vacation/Pleasure Visitors differs from that of all visitors. Travel agents do more things more often for Vacation/Pleasure Visitors than they do for Business Visitors or those travelling to visit friends and relatives. Half of Vacation/Pleasure Visitors use a travel agent for booking a cruise or tour package and half of them get brochures from an agent as well. For one of four Vacation/Pleasure Visitors a travel agent recommends the type of transportation or trip for their Alaska experience. Agents are most likely to do this for those who end up choosing round trip cruises.

For those not on a package tour, the agents are most likely to book independent arrangements for Overseas visitors, those using Domestic Air and for Vacation/Pleasure Visitors to Southwest Alaska.

In one of eight cases, the agent recommends the travel company. This is most likely to happen to the cruise market and least likely to Overseas visitors. Agents are playing a stronger role in recommending Alaska, with 9% of all Vacation/Pleasure Visitors having an agent do so.

Graph IV-C-3



## D. Demographics of Vacation/Pleasure Visitors

### Education

The Vacation/Pleasure Visitor to Alaska is highly educated with nearly half being college graduates. Visitors to Southwest Alaska, the Inde-Package market, the Domestic Air market and Southerners tend to be moderately more educated. The Package market, the Highway market and Midwesterners are moderately less educated but large portions of even these markets are college graduates, including a third of the Highway market. The Ferry market is more educated than average. Education levels are relatively unchanged since 1985.

### Household Income

Visitor income has increased significantly since 1985, from \$50,000 to \$59,000. A share of this increase is due to inflation, but still, the average Vacation/Pleasure Visitor is moderately better off than his/her 1985 counterpart. Visitors to Southwest Alaska are by far the wealthiest (\$84K), followed by Independents, the Domestic Air market and Southerners. Least affluent are Canadians, the Highway market and the Overseas market (except Japanese at \$65K).

### Age, Gender, Employment

The Alaska Vacation/Pleasure Visitor is getting younger, and quickly. The 1989 visitor is four years younger than the 54-year old 1985 Vacation/Pleasure Visitor. The largest group is still the 65+ senior market. The gender gap is closing from 53%-47% to 51%-49% female. Employment trends are for slightly more of the total to be employed as prime-of-life working Baby Boomers expand the visitor market.

### Origin

Finally, Vacation/Pleasure Visitor origin trends show a small share of total Vacation/Pleasure Visitors coming from the dominant West and the Midwest, while Canada and Overseas countries deliver larger shares of the total than they did in 1985.

### Reader Note

Readers will notice slight, but statistically minimal discrepancies in age, gender, employment and origin data between this report and the *Alaska Visitor Arrivals, Summer 1989* report. The *Arrivals* report, due to its larger sample size and 99% personal intercept survey response rate, contains the most accurate data. While data in this (*Patterns, Opinions and Planning*) report is also very accurate, it is based on a mail survey with an excellent response rate of 75%. Still, the small proportion of non-responses does affect the data slightly, as expected.

Table IV-D-1

## Demographics Vacation/Pleasure Visitors – Summer 1989

	Percent of Visitors
<b>Visitor Education</b>	
Not High School Graduates	5%
High School Graduates	28
1 – 3 Years College	22
College Graduate	21
Attended or Completed Graduate School	24
<b>Visitor Household Income (Average – \$59,000)</b>	
Under \$25,000	14%
\$25,000 – \$34,999	16
\$35,000 – \$49,999	22
\$50,000 – \$74,999	19
\$75,000 – \$99,999	12
\$100,000 and Over	17
<b>Visitor Age (Average – 50 Years Old)</b>	
Under 18 Years	7%
18 – 24 Years	4
25 – 34 Years	7
35 – 44 Years	1
45 – 54 Years	18
55 – 64 Years	24
65 – 74 Years	23
75 + Years	5
<b>Visitor Gender</b>	
Male	49%
Female	51%
<b>Visitor Employment</b>	
Employed	40%
Retired	40
Other	20
<b>Visitor Origin</b>	
West	34%
California	16
Washington	6
Midwest	19
South	18
East	12
Canada	10
Overseas	6
Germany/Switzerland/Austria	3
Japan	1





# **Chapter V. Vacation/Pleasure Visitors Regional Profile**

**A. Visitor Opinions**

**B. Visitor Travel Patterns**

**C. Visitor Travel Planning by  
Regional Visitors**

**D. Demographics**



# Chapter V: Vacation/Pleasure Visitors Regional Profile

## Introduction

Chapter IV provided an overview of Vacation/Pleasure visitors in total. This chapter describes this dominant summer market by region, to provide more detailed information for the Alaska visitor industry.

Information in this chapter is presented in a similar format as Chapter III. Some of the results may look similar as well, since Vacation/Pleasure visitors comprise two-thirds of all summer visitors. However, some important differences exist among Vacation/Pleasure visitors, when comparing to other trip purpose groups, such as business visitors or those visiting friends and relatives. Therefore, to assist Alaska visitor industry marketers in reaching this "impactable" market a more detailed analysis of Vacation/Pleasure visitors is presented here.

## A. Vacation/Pleasure Visitor Opinions by Region

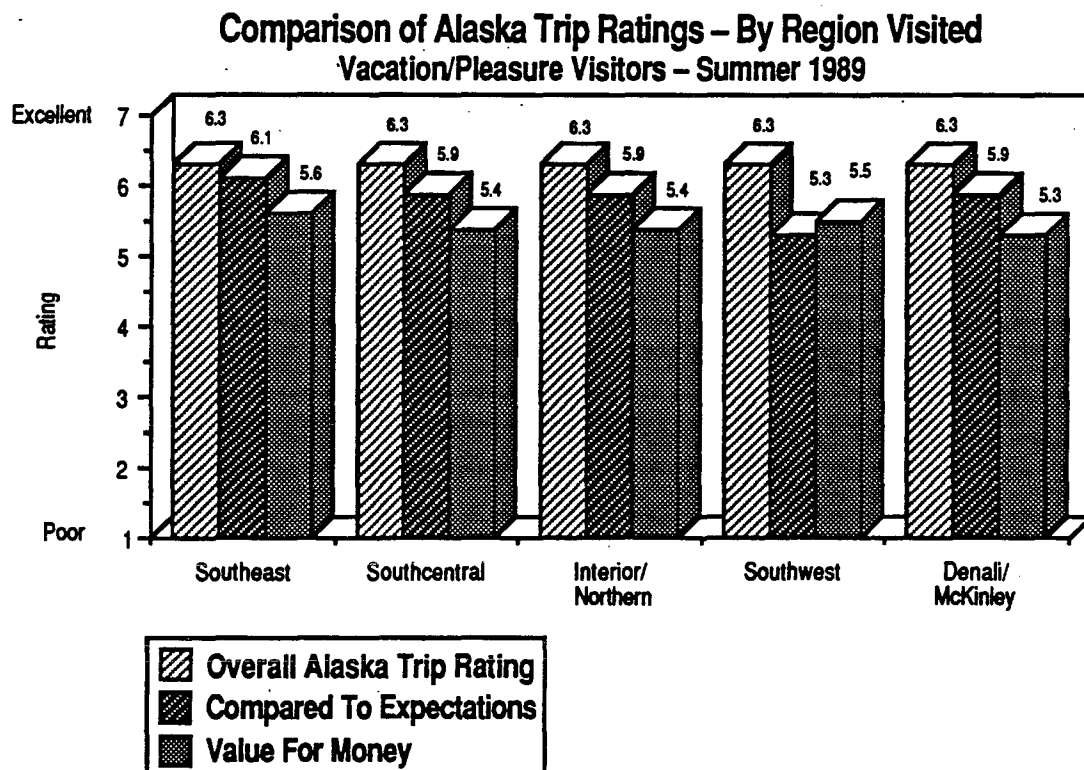
### Alaska Trip Ratings

Vacation/Pleasure visitors to all regions rate their trip very highly, 6.3 on average on the 1 to 7 scale. Over half of all visitors to every region, except Southwest, gave the highest rating of "7". Nearly half (45%) of Southwest's visitors gave the highest rating.

When asked how well their Alaska trip lived up to their expectations, visitors to all regions indicated that their experience exceeded their expectations. However, regional visitors rated this question lower than their overall trip rating. Southeast visitors were highest with an average 6.1 rating, Southwest visitors the lowest with a 5.3 average rating.

Value of the Alaska experience received for the money spent, as compared to other destinations, showed above average ratings but were also lower than the overall Alaska experience ratings. Again, except for Southwest, value for the money ratings were also lower than compared to expectations ratings. Though these average ratings are favorable (on the very positive side of the rating scale - "4" is the middle), and don't seem to adversely affect the overall visitor experience, they still demonstrate that in all regions of Alaska still could improve value perceptions for the visitor. It's possible for the already very high overall trip experience ratings to be even higher if the Alaska visitor also feels their trip was a better value.

Graph V-A-1



## Value for the Money Ratings

Value for the money ratings of various aspects of each regional Vacation/Pleasure visitor trip are presented in Table V-A-1. Reviewing these ratings by region provides marketers with an understanding of which aspects of a visitors trip are perceived as providing good monetary value and which aspects have room for improvement. Many differences exist in these ratings among each regions visitors, although all average ratings are reflect that Alaska compares well to other destinations.

Highest rated value for the money aspects of a Vacation/Pleasure visitors' trip in all regions are the friendliness and helpfulness they experienced by Alaskans during their travels and the sightseeing and attractions Alaska has to offer. On the other hand, accommodations and restaurants consistently rated the lowest in every region, ranging from 4.9 to 5.5. Southeast's accommodations and restaurants rated better than other regions (5.5 and 5.3 respectively), due in part to the large number of cruise-related visitors who tend to rate their experiences somewhat higher than other visitor types. The lowest ratings for accommodations and restaurants among the regions is found in the Denali/McKinley area (4.9 for both).

Ratings for transportation to, from and within Alaska, as well as for activities, indicate Alaska compares well to other destinations. Only for Southwest visitors was transportation within Alaska rated much lower than other regions. Transportation systems in bush areas of Southwest Alaska tend to be very reliant on small aircraft and weather factors, which may have influenced this rating.

Table V-A-1

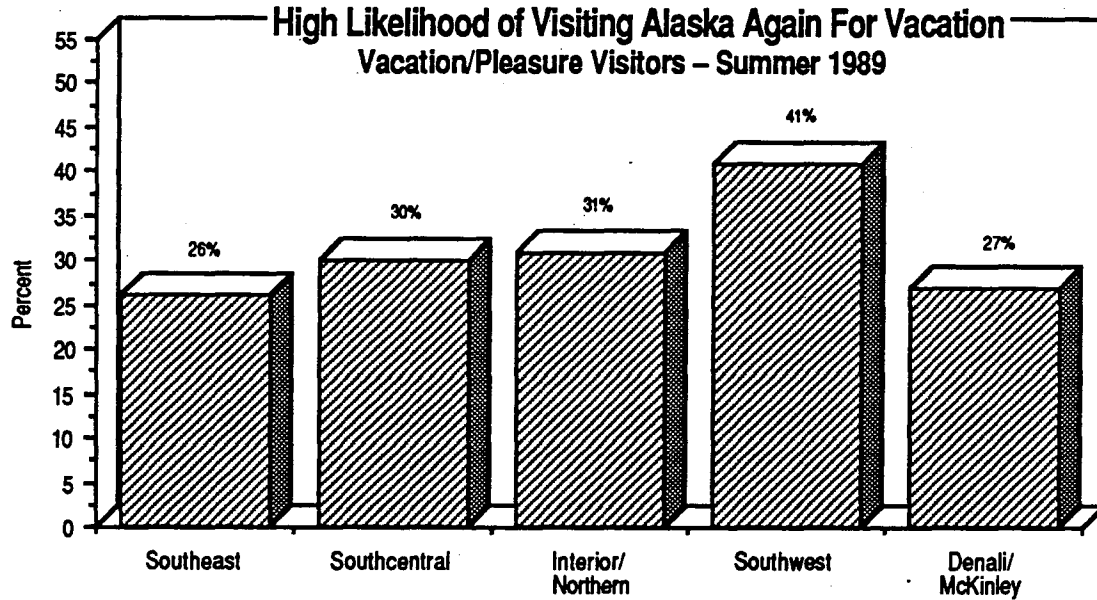
### Value For Money Ratings By Region Visitor Vacation/Pleasure Visitors – Summer 1989 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Accommodations	5.5	5.1	5.1	5.1	4.9
Transportation To Alaska	5.7	5.4	5.5	5.7	5.4
Transportation From Alaska	5.6	5.4	5.5	5.3	5.6
Transportation Within Alaska	5.7	5.5	5.6	5.1	5.5
Sightseeing/Attractions	6.0	6.0	6.0	6.1	6.0
Activities	5.6	5.6	5.5	6.0	5.5
Restaurants	5.3	5.0	4.9	4.9	4.9
Friendliness/Helpfulness	6.4	6.2	6.3	6.0	6.3

## Likelihood of Visiting Alaska Again for Vacation

Vacation/Pleasure visitors with the highest likelihood of visiting Alaska again are visitors to Southwest. A high proportion of Southwest VPs visit that region to fish and tend to visit Alaska more than once. Vacation/Pleasure visitors to other regions are more likely to be on their "once in a lifetime" trip to Alaska, and have a lower likelihood of repeating. Still, between one-fourth and one-third of Vacation/Pleasure visitors to each region indicate a high likelihood to return to Alaska for vacation.

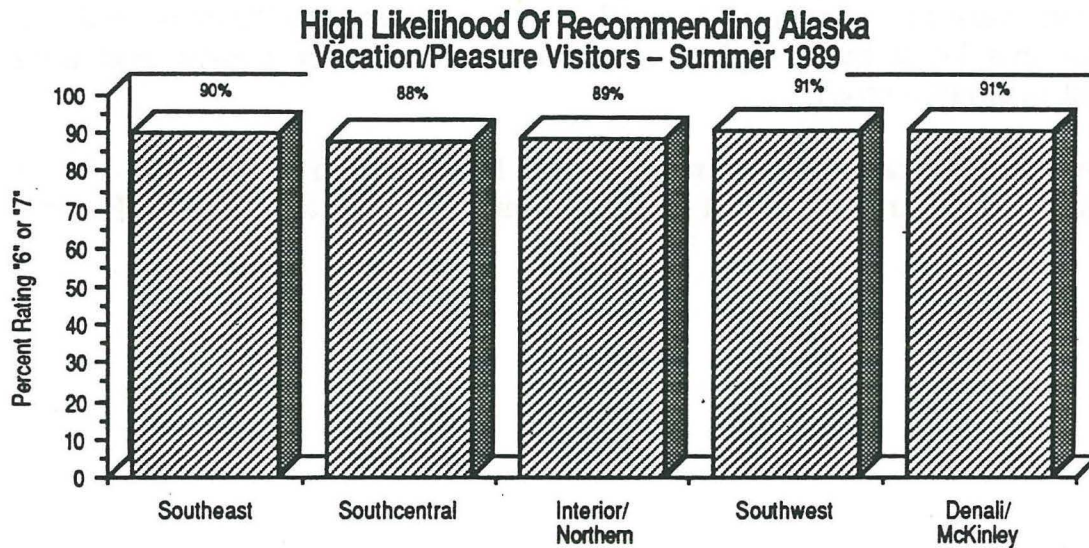
Graph V-A-2



## Likelihood of Recommending Alaska as a Vacation Place

A very high percentage of each region's visitors indicated a high likelihood of recommending Alaska as a place to vacation. When asked if they had actually recommended Alaska as a result of their visit, nearly all Vacation/Pleasure visitors to all regions said yes. (Southeast -95%, Southcentral - 95%, Interior/Northern-93%, Southwest-89% and Denali/McKinley-96%). Vacation/Pleasure visitors to all regions are the best ambassadors Alaska has to spread the good word. This is why it is critically important for the Alaska visitor industry to maintain and continually improve the current high level of visitor satisfaction.

Graph V-A-3





## Misconceptions About Alaska

For nearly half of Vacation/Pleasure visitors to all regions, Alaska was better than expected. The weather was the major misconception cleared up for visitors to all regions particularly Southeast. During the Summer 1989, when the survey was conducted, Southeast Alaska was experiencing one of the driest summers on record. Visitors may have been prepared for the worst, only to experience sunny skies and moderate temperatures.

Alaska was worse than expected for only a small percentage of each region's Vacation/Pleasure visitors. Alaska's attractions and appeal appeared to be the major aspect which did not meet the expectations of a small (less than one in ten) proportion of these visitors. Visitors in this group most often mentioned they saw less wildlife than they expected and the fishing was not as good as expected. In Southwest, facilities and transportation were of concern to a small group of Vacation/Pleasure visitors. Traveling within this large bush region often involves weather delays and long distances traveled in small aircraft.

Alaska was different for Vacation/Pleasure visitors in four of five regions. The size of the state was the most often mentioned in all regions, along with breaking Eskimo stereotypes.

Table V-A-2

**Biggest Misconception Cleared Up By Visit to Alaska  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Each Region's V/P Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
<b>Better Than Expected</b>	<b>53%</b>	<b>47%</b>	<b>46%</b>	<b>46%</b>	<b>43%</b>
Weather	35	29	25	27	23
Appeal of Alaska/Attractions	8	8	6	3	7
Roads	5	7	11	13	9
Prices/Cost	2	2	1	–	1
Other	28	25	24	47	22
<b>Different Than Expected</b>	<b>13%</b>	<b>19%</b>	<b>18%</b>	<b>1%</b>	<b>24%</b>
<b>Worse Than Expected</b>	<b>7%</b>	<b>9%</b>	<b>11%</b>	<b>6%</b>	<b>12%</b>
Appeal of Alaska/Attractions	5	6	7	–	8
Prices/Cost	–	1	2	–	2
Facilities/Transportation	–	1	1	6	–
Roads	–	1	1	–	1
Weather	1	–	–	–	–
Other	–	–	–	–	–

## B. Vacation/Pleasure Visitor Travel Patterns

### Entry and Exit Modes by Region Visited

Entry and exit modes not only differ for Vacation/Pleasure visitors in general, but also differ significantly by region. For instance, Cruiseship is the dominant mode for both entry into and exit from the State of Southeast Alaska visitors, followed by Domestic Air. However, Domestic Air is the dominant mode for State entry and exit for the remaining four regions, particularly Southwest. Highway plays a larger role for entry into and exit from Alaska in Interior/Northern and Denali/McKinley than any other region and International Air is the second most important mode of entry and exit for Southwest VPs. The ferry, while a smaller percentage of entries to the State overall, is an important entry and exit mode for visitors to the Interior, Southeast and Denali/McKinley.

Table V-B-1

#### Entry Mode Into Alaska By Region Visited Vacation/Pleasure Visitors – Summer 1989 (Percent of Each Region's V/P Visitors)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Domestic Air	22%	48%	38%	80%	42%
Cruiseship	53	23	18	2	20
Highway/Private Vehicle	15	18	32	2	26
Ferry	9	6	10	3	8
International Air	1	5	2	14	4

Table V-B-2

#### Exit Mode From Alaska By Region Visited Vacation/Pleasure Visitors – Summer 1989 (Percent of Each Region's V/P Visitors)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Domestic Air	27%	52%	40%	85%	46%
Cruiseship	49	19	16	–	16
Highway/Private Vehicle	14	17	29	2	23
Ferry	10	8	13	1	11
International Air	1	5	3	12	4

## Total Mode Market by Region Visited

Table V-B-3 provides a total picture of the number of Vacation/Pleasure visitors carried by each transportation mode for either entry into or exit from the State or both. This analysis provides insight into the relative size and importance of each transportation mode for each region.

Cruiseship is the mode most often used by Vacation/Pleasure visitors to Southeast. However, Domestic Air is also used by a large number of Southeast visitors. The growth of the Air/Cruise packages, as well as the increase in Independent visitors to Southeast Alaska contributes to this large number. A significant portion of Southeast VPs also use the Highway and Ferry. Southeast VPs using the International Air mode is still a relatively small number.

Southcentral VPs predominantly use the Domestic Air mode, however, significant numbers of visitors to this region use Cruiseship for part of their trip. VP visitors to Southcentral are also users of the Highway and Ferry modes. International Air is used by more VP visitors to Southcentral than VPs to any other region.

Modes used by VP visitors to the Interior/Northern and Denali/McKinley regions reflect similar use patterns. Significant numbers of VP visitors to these regions are carried by all modes. Southwest visitors, on the other hand, predominantly use Domestic Air and International Air. Very few VPs visiting Southwest experience the remaining modes of Highway, Ferry or Cruiseship.

Table V-B-3

### Mode Market Size By Region Visited Vacation/Pleasure Visitors – Summer 1989 (Number of Each Region's V/P Visitors)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Domestic Air	109,600	159,600	81,200	19,400	92,300
Cruiseship	175,800	87,500	46,500	400	51,500
Highway/Private Vehicle	51,300	53,800	55,500	400	46,900
Ferry	39,400	29,800	29,200	600	26,400
International Air	3,700	14,700	4,600	3,100	6,600

## Vacation/Pleasure Visitor Travel Type by Region Visited

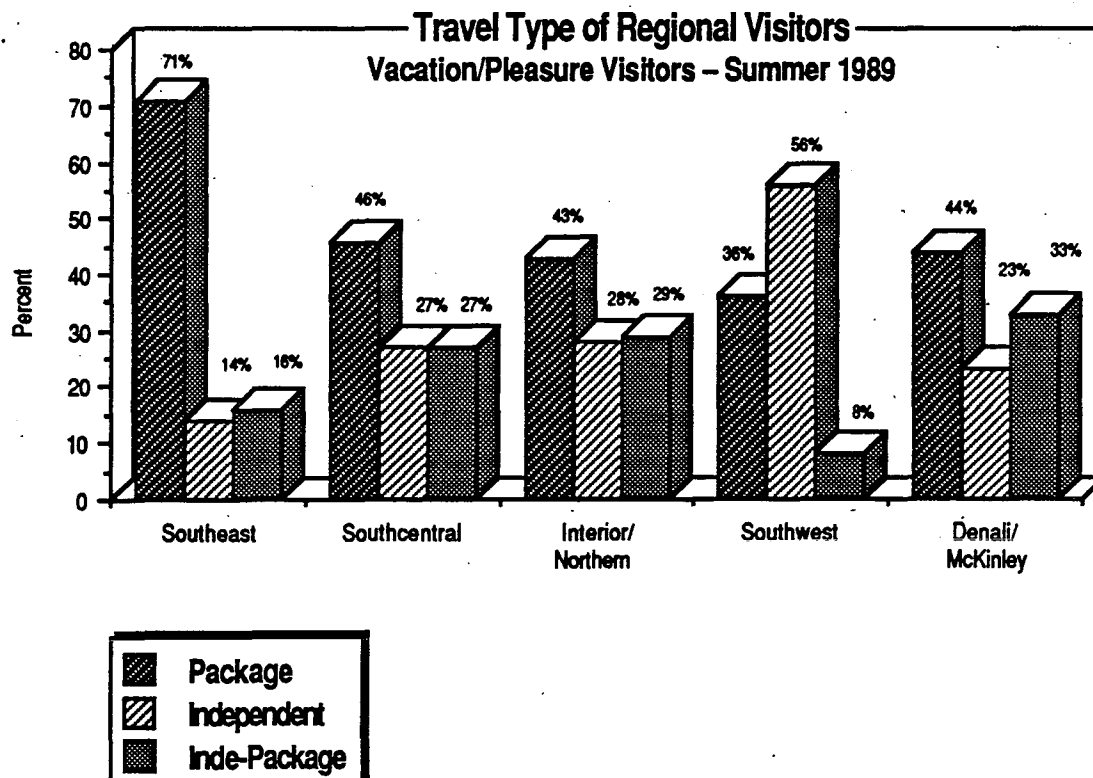
Vacation/Pleasure visitor travel type varies significantly by region visited. A large portion of Vacation/Pleasure visitors travel on a packaged tour and this is especially true among VPs visiting Southeast. Seven in ten Southeast VPs are traveling in Alaska on a package, the highest portion of any region. Most of these VPs are on a round-trip cruise, cruise/tour or air/cruise package, while a small percentage are on another type of packaged trip, primarily fishing-related. The remaining 30% are either traveling as an Independent or Inde-Package (Independents who purchase sightseeing tours once they arrive in Alaska) visitor.

Southcentral and Interior/Northern VP visitors are nearly identical in their make up. Almost half are traveling on a package, with the remaining split equally between Independents and Inde-Packages. Those traveling on a package are primarily cruise related (cruise/tour or cruise/air), and a small percentage traveling on a non-cruise related package (fishing, air/lodging).

Denali/McKinley VP visitors also show a similar split between Package and Independent visitors. However, more Independents tend to be Inde-Package visitors purchasing sightseeing while in Alaska, than pure Independents.

Further regional differences are reflected among Southwest VP visitors. Most of these VPs are pure Independents, with only a small percentage Inde-Package. Though the proportion of Package VP visitors to this region is smaller than other regions, still over one-third travel on a package, most likely fishing-related.

Graph V-B-1



## Vacation/Pleasure Visitor Length of Stay by Region Visited

Vacation/Pleasure visitor length of stay patterns are different than other trip purpose groups. The average length of stay for VPs in the state and in each region is slightly less than the visitor averages overall. Vacation/Pleasure visitors to Denali/McKinley and the Interior/Norther regions stay in the state the longest, nearly 13 nights on average, yet spend the least amount of time in those regions (less than 2 nights for Denali/McKinley and less than three nights in the Interior).

On the other hand, VP visitors to Southeast stay in the state the shortest amount of time, nine nights on average, but spend half their trip in the region. VP visitors to Southcentral spend more time in Alaska than Southeast or Southwest visitors and also spend half their trip in the Southcentral region.

Southwest VPs again, are different than other regional visitors, spending on average 10 nights in Alaska - seven in the Southwest region alone. Clearly, VP visitors to Southwest do not tour in other parts of the state as do other regional visitor. Instead, they spend most of their trip in Southwest, most likely on a fishing trip. Their remaining nights are most likely spent in Southcentral, connecting to domestic or international flights.

Table V-B-4

### Length Of Stay By Region Visited Vacation/Pleasure Visitors - Summer 1989

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Length of Stay In Alaska	8.9	11.4	12.8	9.8	12.9
Length of Stay In Region	4.5	5.4	2.5	6.8	1.6
Percent of Alaska Trip Time In Region	51%	47%	20%	69%	12%

## **Vacation/Pleasure Visitor Length of Stay by Community**

Length of stay in each region and community by regional VP visitors is shown on Table V-B-5. For example, of the 5.4 nights spent in Southcentral by Vacation/Pleasure visitors to Southcentral, nearly half (2.5) are spent in Anchorage. The remaining nights are spread among Kenai Peninsula communities, Matanuska/Susitna areas and the Prince William Sound area.

Vacation/Pleasure visitors to Southeast spend the majority of their 4.5 nights in the region At Sea, either on a cruiseship or ferry. Juneau, Ketchikan and Skagway are the major community beneficiaries of overnight visitors.

Interior/Northern VPs spend nearly two nights in Fairbanks of their 2.5 nights in the region. Tok is another important overnight stop for visitors to this region.

Southwest VPs stay overnight in various parts of the region, with King Salmon as the leading community. King Salmon is a jumping off point for many fisherman and facilities accomodating the fisherman have grown substantially in the past four years.

Denali/McKinley length of stay for VPs of 1.6 nights reflects the large number of package visitors who stay in this area only one night as part of a tour. The remaining independents stay slightly longer.

Table V-B-5

**Length of Stay**  
**Vacation/Pleasure Visitors – Summer 1989**  
(Average Number of Nights Spent by Regional Visitors in Region and Community)  
(1 = Poor and 7 = Excellent on 1 to 7 Scale)

	Average # of Nights	% of Visitors
<b>Southeast</b>	<b>4.5</b>	<b>100%</b>
At Sea	3.2	71
Ketchikan	0.3	7
Wrangell	-	-
Petersburg	0.1	2
Sitka	0.1	2
Juneau	0.3	7
Haines	0.2	4
Skagway	0.3	7
Glacier Bay	-	-
Other Southeast Locations	0.1	2
<b>Southcentral</b>	<b>5.4</b>	<b>100%</b>
At Sea	0.7	13
Anchorage	2.5	46
Homer	0.4	7
Kenai/Soldotna	0.5	9
Seward	0.4	7
Other Kenai Peninsula Communities	0.2	4
Wasilla	-	-
Palmer	0.3	6
Valdez/Prince William Sound	0.2	4
Cordova	-	-
Other Southcentral Locations	0.3	6
<b>Interior/Northern</b>	<b>2.5</b>	<b>100%</b>
Fairbanks	1.8	72
Tok	0.5	20
Kotzebue	-	-
Nome	-	-
Barrow	-	-
Prudhoe Bay	-	-
Other Interior Locations	0.2	8
<b>Southwest</b>	<b>6.8</b>	<b>100%</b>
At Sea	-	-
Bethel	0.1	1
Dillingham	0.1	1
Kodiak	0.5	7
Katmai	0.7	10
King Salmon	1.6	24
Aleutians	-	-
Lodges:		
Alaska Peninsula	0.2	3
Bristol Bay	0.9	13
Lake Clark/Iliamna	0.6	9
Other Southwest Locations	2.1	31
<b>Denali/McKinley</b>	<b>1.6</b>	<b>100%</b>



## **Lodging Type of Vacation/Pleasure Visitors by Region Visited**

### **Lodging Type Use**

Use of various types of lodging by Vacation/Pleasure visitors is unique in each region. In Southeast, for instance, most visitors use cruiseships for lodging while in the region. Less than one in five uses a hotel or motel. VP visitors using the ferry for accommodations comprises one in six. Other forms of lodging, such as bed & breakfasts, RV/campgrounds, resorts/lodges, and private homes are used by a smaller proportion of this region's visitors.

On the other hand, VP visitors to the Southcentral and Interior/Northern regions predominantly use hotels/motels as a form of lodging while in the region. In Southcentral, nearly one-third also use cruiseships for lodging. RV/Campgrounds are used by one-quarter of Southcentral and one-third of Interior/Northern VPs, a large proportion of both those regions' VP visitors.

Denali/McKinley VPs tend to use resorts or lodges more than other types of lodging in that region, a reflection of the large number of resorts and lodges in and around Denali National Park. RV/campground areas are also used by a large number of visitors to this region (just over one-third), again a reflection of visitor facilities available in and around the national park.

Resorts and lodges are also popular for Southwest. Over half of the Vacation/Pleasure visitors to this region uses this type of lodging, most likely at a fishing lodge or resort. One in five Southwest VPs also use RV/campground facilities. The remaining lodging types are used by a small percentage of this region's VPs.

Table V-B-6

**Lodging Type Use  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Each Region's V/P Visitors)**

<b>Lodging Type</b>	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
Hotel/Motel	18%	57%	62%	5%	23%
Resort/Lodge	3	5	1	54	44
Bed & Breakfast	3	7	3	7	-
Private Home	3	15	6	11	-
R.V./Campground	11	25	33	21	35
Cruiseship	70	30	-	-	-
Ferry	16	2	-	2	-
Other	1	3	1	12	1

## Length of Stay

### Length of Stay by Lodging Type

Use of various lodging types and length of stay by Vacation/Pleasure visitors varies by region visited. Table V-B-7 provides detailed information on the length of stay in each lodging type by visitors using that lodging type. For example, when a Vacation/Pleasure visitor to Southeast Alaska uses a hotel/motel (18% of VPs to Southeast), their average length of stay is 2.4 nights.

Most VP visitors to Southeast Alaska use a cruiseship (70%) for lodging and stay overnight in that lodging type on average 4.2 nights. Only visitors using RV/campground facilities (11%) and private homes (3%) stay in those lodging types longer. (4.8 and 8.6 nights, respectively). Hotel/motel users in Southeast stay an average of 2.4 nights, whereas resort/lodge users stay slightly less (2.1 nights) and bed & breakfast user stay slight longer (3.1 nights).

In Southcentral, length of stay in hotel/motels by users is longer in this region than another other. Resort/lodge user length of stay is also longer than other regions, except Southwest, where resort/lodge stays average one week. Stays in RV/campground facilities by users in Southcentral also average one week.

Vacation/Pleasure visitors to the Interior/Northern stay in private' homes and RV/campgrounds longer than other lodging types, (5.6 and 3.9 nights, respectively). Resort/lodge users in Southwest Alaska (54% of VPs to that region) stay the longest of any other user group at an average of one week. Those VPs using private homes and RV/campgrounds stay longer than hotel/motel, bed & breakfast and ferry users.

Denali/McKinley VPs primarily use resort/lodges, RV/campgrounds and hotel/motels for their stays in the region. Resort/lodge and hotel/motel stays average the same amount of time, at 1.4 nights each, whereas those using RV/campgrounds stay one full night longer.

Table V-B-7

**Length Of Stay By Lodging Type**  
**By Region Visited**  
**Vacation/Pleasure Visitors – Summer 1989**  
**(Average Number of Nights by Users of Each Type Only)**

<b>Lodging Type</b>	<b>South-east</b>	<b>South-central</b>	<b>Interior/ Northern</b>	<b>South-west</b>	<b>Denali/ McKinley</b>
Hotel/Motel	2.4	2.5	2.0	2.3	1.4
Resort/Lodge	2.1	2.9	1.1	7.0	1.4
Bed & Breakfast	3.1	2.4	1.9	1.7	2.4
Private Home	8.6	9.7	5.6	5.5	3.2
R.V./Campground	4.8	7.2	3.9	4.9	2.4
Cruiseship	4.2	2.5	–	–	–
Ferry	2.3	1.5	–	1.4	–
Other	5.3	17.8	4.4	7.6	4.8

## Lodging Type Use of Vacation/Pleasure Visitors by Community

Of importance to individual communities is the analysis presented in Tables V-B-8 and V-B-9. This analysis shows Vacation/Pleasure visitors lodging type use by community. Table V-B-8 shows the percent of each community's Vacation/Pleasure visitors that used a particular type of lodging. This table reads across rather than down. For example, in the Southcentral region, among visitors to Anchorage, 70% used hotel/motels, 1% used resort/lodges, and 3% used bed & breakfasts.

Table V-B-9 provides information on the number of nights users of each lodging type stayed in each community. For Anchorage, visitors who used hotel/motels (70%), stayed an average of 2.3 nights. By combining the information from both tables, communities can quickly assess the role of each lodging type in their community.

Table V-B-8

**Lodging Type Use**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (Percent of Regional V/P Visitors Using Lodging By Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise- ship	Ferry
<b>Southeast</b>							
At Sea	–%	–%	–%	–%	–%	81%	19%
Ketchikan	42	16	10	12	14	–	–
Wrangell	50	–	–	36	14	–	–
Petersburg	59	–	10	15	18	–	–
Sitka	30	–	13	14	43	–	–
Juneau	67	–	8	7	19	–	–
Haines	42	–	1	2	58	–	–
Skagway	54	3	5	–	39	–	–
Glacier Bay	13	65	2	–	19	–	–
Other Southeast Locations	7	14	–	38	14	–	–
<b>Southcentral</b>							
At Sea	–%	–%	–%	–%	–%	91%	6%
Anchorage	70	1	3	13	16	–	–
Homer	13	–	16	9	69	–	–
Kenai/Soldotna	17	11	5	8	69	–	–
Seward	28	–	11	7	59	–	–
Other Kenai Peninsula Com.	11	20	–	16	52	–	–
Wasilla	5	–	10	10	73	–	–
Palmer	23	1	–	17	60	–	–
Valdez/Prince William Sound	38	–	13	–	47	–	–
Cordova	29	–	–	–	71	–	–
Other Southcentral Locations	7	13	8	9	56	–	–
<b>Interior/Northern</b>							
Fairbanks	63%	–%	4%	5%	28%	–%	–%
Tok	32	–	–	–	67	–	–
Kotzebue	100	–	–	–	–	–	–
Nome	100	–	–	–	–	–	–
Barrow	100	–	–	–	–	–	–
Prudhoe Bay	100	–	–	–	–	–	–
Other Interior Locations	11	–	–	12	71	–	–
<b>Southwest</b>							
At Sea	–%	–%	–%	–%	–%	–%	100%
Bethel	–	–	100	–	–	–	–
Dillingham	–	50	50	–	–	–	–
Kodiak	16	5	–	23	58	–	–
Katmai	–	46	–	–	50	–	–
King Salmon	13	87	–	–	–	–	–
Aleutians	–	–	–	–	–	–	–
Lodges:							
Alaska Peninsula	–	67	–	–	22	–	–
Bristol Bay	–	96	–	–	4	–	–
Lake Clark/Iliamna	–	92	–	–	–	–	–
Other Southwest Locations	–	18	2	26	10	–	–
<b>Denali/McKinley</b>	<b>23</b>	<b>44</b>	<b>–</b>	<b>–</b>	<b>35</b>	<b>–</b>	<b>–</b>

Table V-B-9

**Average Number Of Nights**  
**Vacation/Pleasure Visitors – Summer 1989**  
(Average Number of Nights Spent by V/P Visitors in Region and Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise- ship	Ferry
<b>Southeast</b>							
At Sea	-	-	-	-	-	4.1	2.3
Ketchikan	1.8	1.8	1.7	8.5	10.2	-	-
Wrangell	1.0	-	-	5.0	1.0	-	-
Petersburg	1.8	-	1.7	7.5	1.7	-	-
Sitka	2.0	-	1.7	4.7	1.7	-	-
Juneau	1.5	-	3.2	4.4	2.7	-	-
Haines	1.3	-	2.0	1.0	2.3	-	-
Skagway	1.2	1.1	1.3	1.0	2.0	-	-
Glacier Bay	1.2	1.9	1.0	-	1.0	-	-
Other Southeast Locations	4.6	5.0	-	8.0	1.8	-	-
<b>Southcentral</b>							
At Sea	-	-	-	-	-	2.5	1.6
Anchorage	2.3	1.3	1.9	8.0	3.5	-	-
Homer	1.5	-	1.3	7.3	2.3	-	-
Kenai/Soldotna	1.1	4.1	1.0	3.3	3.2	-	-
Seward	1.5	2.0	1.5	5.5	1.5	-	-
Other Kenai Peninsula Com.	1.3	1.9	-	12.3	3.1	-	-
Wasilla	1.0	-	1.4	1.3	2.5	-	-
Palmer	1.3	1.0	-	15.0	1.4	-	-
Valdez/Prince William Sound	1.0	-	1.0	-	1.9	-	-
Cordova	3.3	-	-	-	1.0	-	-
Other Southcentral Locations	1.8	2.4	1.8	4.0	2.6	-	-
<b>Interior/Northern</b>							
Fairbanks	1.8	1.2	1.9	6.1	2.9	-	-
Tok	1.3	1.0	-	-	1.7	-	-
Kotzebue	1.0	-	-	-	-	-	-
Nome	1.0	-	-	-	1.0	-	-
Barrow	1.0	-	-	-	-	-	-
Prudhoe Bay	1.7	-	-	-	-	-	-
Other Interior Locations	2.0	1.0	-	3.9	2.0	-	-
<b>Southwest</b>							
At Sea	-	-	-	-	-	-	1.4
Bethel	-	-	1.0	-	-	-	-
Dillingham	-	14.0	3.0	-	-	-	-
Kodiak	2.9	1.0	-	4.2	2.8	-	-
Katmai	-	5.7	-	-	6.7	-	-
King Salmon	2.0	7.4	-	-	-	-	-
Aleutians	-	-	-	-	-	-	-
Lodges:							
Alaska Peninsula	-	8.0	-	6.0	3.0	-	-
Bristol Bay	-	7.0	-	-	10.0	-	-
Lake Clark/Iliamna	-	5.0	-	3.0	-	-	-
Other Southwest Locations	-	10.0	7.0	5.9	9.3	-	-
<b>Denali/McKinley</b>	<b>1.4</b>	<b>1.4</b>	<b>2.4</b>	<b>3.2</b>	<b>2.4</b>	<b>-</b>	<b>-</b>

## Regional Vacation/Pleasure Visitor Overlap Patterns

Most Vacation/Pleasure visitors to Alaska visit more than one region during their stay in the state. Over half of VP visitors to Southeast, for instance, find their way to the Southcentral region and more than one-third visit the Interior/Northern and Denali/McKinley regions. Only a few Southeast VPs visit the Southwest region.

By the same token, six out of ten VP visitors to Southcentral Alaska also visit Southeast and Denali/McKinley. Nearly 60% visit the Interior/Northern region as well.

VP visitors to the Interior/Northern and Denali/McKinley regions appear to be the most well-traveled around the state. Nearly all visitors to these two regions visit Southcentral and seven out of ten visit Southeast. Of the Interior/Northern VPs 85% visit Denali, and of the Denali VPs nearly the same percentage visits the Interior.

Southwest VPs are the least traveled within the state. Most visit Southcentral (83%) in addition to Southwest, but relatively few venture to the other regions of the state.

Table V-B-10

### Regional Visitor Overlap By Region Visited Vacation/Pleasure Visitors – Summer 1989 (Percent of Each Region's V/P Visitors)

Also Visited	Regions Visited				
	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Southeast	100%	62%	70%	6%	69%
Southcentral	55	100	95	83	99
Interior/Northern	38	57	100	22	82
Southwest	1	8	4	100	2
Denali/McKinley	39	62	85	13	100



## **Community Visitor Overlap of Vacation/Pleasure Visitors**

In addition to providing information on regional visitor overlap, the *Visitor Opinion Survey* also provides detailed information on the percentage of visitors to each region who visit communities and attractions in other regions of the state. Table V-B-11 presents the percent of each region's VPs who visit other communities in the state.

Vacation/Pleasure visitors to Southeast visit many communities in Southeast, as well as Anchorage (53%), Fairbanks (35%) and Denali (39%). VPs to Southcentral most often visit Denali (62%) Juneau (51%), Fairbanks (51%) and Skagway (46%). Most well-traveled Interior/Northern and Denali/McKinley VP visitors also visit Anchorage (94% and 98%, respectively) and over half visit Juneau and Skagway. The lesser traveled Southwest VPs usually visit Anchorage (83%) when outside the Southwest region.

## **Regional Vacation/Pleasure Visitors to Attractions**

Table V-B-12 provides detailed information on the percentage of visitors to each region who visit attractions in other regions of the state. This table is similar to Table V-B-11. For example, of the Vacation/Pleasure visitors to Southeast Alaska, 25% also visited Portage Glacier in Southcentral, 18% visited Columbia Glacier in Prince William Sound and 24% visited the University of Alaska-Fairbanks.

Those readers who market their products and services instate are encouraged to review both Tables V-B-11 and 12 in detail. The information provided in these tables is important for instate marketers because it provides insight about Vacation/Pleasure visitor travel patterns, and where marketing messages can reach VPs along the way.

Table V-B-11

**Community Visitor Overlap**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (Percent of Each Region's V/P Visitors)

Visitors to These Regions:	South- east (258,000)	South- central (230,900)	Interior/ Northern (139,200)	South- west (22,800)	Denali/ McKinley (144,700)
<b>Visited These Communities:</b>					
<b>Southeast</b>					
Juneau	84%	51%	52%	5%	53%
Ketchikan	77	42	39	5	41
Skagway	67	46	54	3	52
Glacier Bay	61	35	32	3	34
Sitka	46	24	24	5	25
Haines	25	19	29	2	27
Wrangell	14	10	13	1	12
Petersburg	10	7	10	2	10
Other Southeast Locations	2	1	2	–	2
<b>Southcentral</b>					
Anchorage	53	96	94	83	98
Seward	20	39	39	14	43
Kenai/Soldotna	12	30	28	11	34
Palmer	12	26	32	4	35
Homer	11	26	28	10	30
Valdez/Prince William Sound	23	34	34	13	38
Wasilla	9	20	23	7	27
Whittier	22	30	29	5	31
Glennallen	10	20	28	4	26
Other Kenai Peninsula Communities	6	15	13	3	19
Cordova	1	4	3	8	5
Other Southcentral Locations	2	5	4	–	5
<b>Interior/Northern</b>					
Fairbanks	35	51	88	10	76
Tok	23	31	54	4	45
Nome	2	3	6	–	5
Prudhoe Bay	1	2	4	2	3
Kotzebue	2	3	6	–	5
Barrow	1	2	3	2	2
Other Interior Locations	5	6	12	7	11
<b>Southwest</b>					
King Salmon	–	4	1	49	–
Kodiak	–	1	2	19	1
Bethel	–	–	–	6	–
Aleutians	–	–	–	–	–
Dillingham	–	2	–	10	–
Katmai	–	–	–	15	–
Iliamna	–	–	–	9	–
Other Southwest Locations	–	3	–	29	–
<b>Denali/McKinley</b>	<b>39</b>	<b>62</b>	<b>85</b>	<b>13</b>	<b>100</b>

Table V-B-12

**Regional Visitors to Attractions**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (Percent of Each Region's V/P Visitors)

	South- east (258,000)	South- central (230,900)	Interior/ Northern (139,200)	South- west (22,800)	Denali/ McKinley (144,800)
<b>Southeast</b>					
Inside Passage	79%	48%	51%	4%	51
Mendenhall Glacier	69	42	43	4	44
Glacier Bay	69	35	33	1	34
Ketchikan Totems	60	32	28	3	30
Skagway's Historic					
Gold Rush District	61	40	48	2	46
Sitka's Russian Church/Dancers	36	17	16	5	17
Alaska State Museum	31	24	29	2	29
Sitka National Historic Park	31	15	16	2	17
Chilkat Bald Eagle Preserve	14	11	17	1	16
Misty Fjords National Monument	11	7	6	2	6
Tracy Arm	9	5	4	-	6
Eaglecrest Ski Area	2	1	2	-	2
<b>Southcentral</b>					
<b>Anchorage Area</b>					
Portage Glacier	25	63	53	21	57
Anchorage Museum					
of History & Art	23	45	43	11	47
Alyeska Ski Resort	8	23	19	3	22
Chugach State Park	8	23	21	9	23
Lake Hood Air Harbor	6	17	13	11	15
Potter Point State Game Refuge	5	12	11	1	14
St. Nicholas Russian Orthodox					
Church and Native Spirit Houses	6	13	13	8	12
Crow Creek Mine	4	9	8	2	10
<b>Kenai Peninsula</b>					
Kenai River	10	32	21	4	26
Kenai National Wildlife Refuge	8	19	16	10	20
Resurrection Bay	6	21	16	2	19
Kachemak Bay	4	12	9	6	13
Kenai Fjords National Monument	4	11	9	4	12
<b>Prince William Sound Area</b>					
Columbia Glacier	18	32	25	10	30
Prince William Sound	15	28	23	9	27
Valdez Pipeline Terminal	13	24	22	9	23
College Fjords	1	14	9	2	11
<b>Matanuska-Susitna Area</b>					
Matanuska Glacier	7	16	17	3	15
Hatcher Pass Recreation Area	2	7	5	1	7
Independence Mine	1	5	4	1	4
Alaska Historical and					
Transportation Museum	2	5	5	1	5

Table V-B-12, Con't

**Regional Visitors to Attractions**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (Percent of Each Region's V/P Visitors)

	<b>South- east (258,000)</b>	<b>South- central (230,900)</b>	<b>Interior/ Northern (139,200)</b>	<b>South- west (22,800)</b>	<b>Denali/ McKinley (144,800)</b>
<b>Interior Northern</b>					
Fairbanks Area	31%	44%	88%	10%	67%
University of Alaska - Fairbanks	24	33	72	8	51
University of Alaska Museum	18	25	54	8	38
Large Animal Research Station	9	13	28	1	20
Agricultural & Forestry (Experimental Station Farm)	7	9	19	<1	13
Geophysical Institute	1	2	3	-	2
Transalaska Pipeline	22	31	67	7	46
Alaskaland	12	17	36	9	27
Dog Mushing Attractions	16	22	46	1	35
Chena River Trips	14	20	43	<1	30
Gold Panning Dredges & Saloons	11	17	37	7	25
Hot Springs	3	5	11	1	7
<b>Other Northern Areas</b>					
Pipeline Haul Road	2	4	7	-	6
Nome - Gold Rush History	3	4	6	-	6
Kotzebue - Eskimo Culture	3	4	6	-	6
Prudhoe Bay Oil Fields	1	2	4	2	2
Barrow	-	-	-	-	-
Brooks Range	<1	1	1	-	1
Gates of the Arctic National Park	<1	<1	<1	-	<1
Arctic National Wildlife Refuge	1	1	1	-	1
<b>Southwest</b>					
Kodiak Russian Orthodox Church	<1	1	1	14	1
Katmai National Park	<1	1	<1	24	<1
Kodiak National Wildlife Refuge	-	<1	<1	6	-
Fort Abercrombie	<1	1	1	7	1
Aleutian Islands	-	-	-	-	-
Baranof Museum	<1	<1	<1	2	<1
Wood River - Tikchik State Park	-	1	1	8	-
Lake Clark National Park	<1	<1	<1	2	<1
Round Island	<1	<1	<1	1	<1
<b>Denali/McKinley</b>	<b>39</b>	<b>62</b>	<b>85</b>	<b>13</b>	<b>100%</b>

## C. Vacation/Pleasure Visitor Travel Planning by Region

### Alaska Trip Planning Timelines by Vacation/Pleasure Visitors

Vacation/Pleasure visitors tend to have a slightly longer average trip planning timeline than all other visitors to Alaska combined, an important distinction for marketers. Further, major differences in planning periods are apparent among different regional visitor groups.

Southwest VPs have the longest planning lead times, making the decision to visit Alaska on average nearly one year in advance and securing travel arrangements on average nearly six months prior to visiting. In fact, one third of this region's VPs decide to visit Alaska more than one year prior to travel. Surprisingly, however, half of this group makes their travel arrangements three months or less before their trip.

Vacation/Pleasure visitors to the remaining four regions have slightly varying planning lead times for both the "When Alaska" decision, as well as for making trip arrangements. However, these regions all reflect similar decision patterns. For example, most VPs to these regions decide to visit Alaska between six and twelve months prior to their trip. And most tend to make their travel arrangements either two to three months or six to seven months prior to departure.

Graph V-C-1

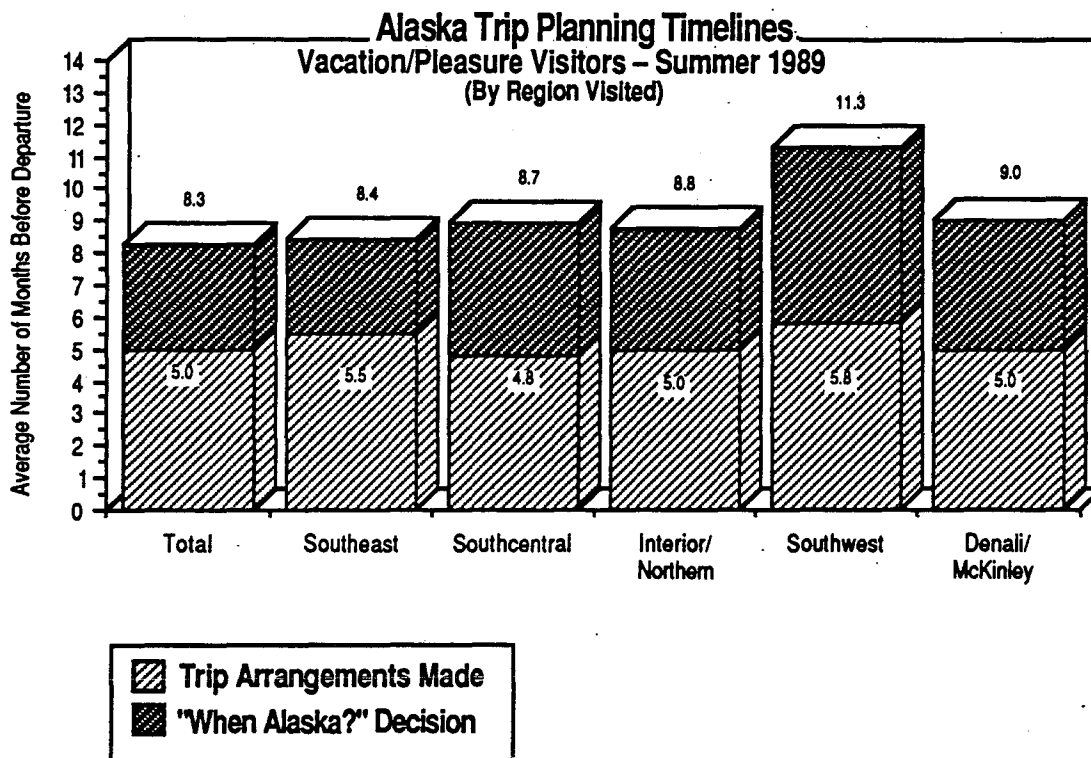


Table V-C-1

**Timelines For Alaska Season/Year Decision  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Each Region's V/P Visitors)**

<b>Months Before Trip</b>	<b>South-east</b>	<b>South-central</b>	<b>Interior/ Northern</b>	<b>South-west</b>	<b>Denali/ McKinley</b>
1 Month or Less	7%	5%	5%	7%	2%
2 - 3 Months	17	16	15	12	15
4 - 5 Months	6	6	6	2	7
6 - 7 Months	20	21	20	4	22
8 - 9 Months	10	12	10	20	9
10 - 12 Months	26	25	27	24	28
More Than 1 Year	13	14	17	34	15

Table V-C-2

**Timelines For Trip Arrangements  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989**

<b>Months Before Trip</b>	<b>South-east</b>	<b>South-central</b>	<b>Interior/ Northern</b>	<b>South-west</b>	<b>Denali/ McKinley</b>
1 Month or Less	11%	14%	10%	10%	10%
2 - 3 Months	23	27	25	41	24
4 - 5 Months	14	14	15	9	16
6 - 7 Months	28	28	31	16	32
8 - 9 Months	11	8	10	7	10
10 - 12 Months	11	7	8	9	8
More Than 1 Year	1	1	2	9	2

## Alaska Trip Decision Criteria

When Vacation/Pleasure visitors were asked, "Please tell us what prompted you to actually decide to visit Alaska this year", the reasons were primarily "Personal". This is particularly true for visitors to all regions except Southwest Alaska, where the leading reason for visiting this year had to do with the attractions and appeal of Alaska.

Leading personal reasons cited by visitors to all regions (except Southwest) included "having the time available now", "opportunity to travel with friends and/or relatives" (not the same as visiting friends or relatives), special occasion (honeymoon, anniversary) and the rather vague "just felt like it". Visiting friends and relatives does influence a small portion of each regions' visitors to visit this year, however a long time desire to see Alaska is a more important influence among VPs.

Word-of-mouth is an important reason, especially among VP visitors to Southwest. Most important to Southwest VPs however, is the attraction and appeal of Alaska, specifically as it relates to fishing.

With the exception, once again, of Southwest VPs, several other factors affect the decision to visit Alaska 'this year'. Advertising/promotion influenced one out of twenty of each region's VPs. Price/discount considerations affected nearly as many. Among VPs to Southeast 6% indicated their desire to cruise, higher than other regions' VPs. Remaining reasons cited included trip extension, curiosity, cool weather and the desire to visit all 50 states.

Table V-C-3

**Main Reason For "When Alaska?" Decision  
By Region Visited  
Vacation/Pleasure Visitors.- Summer 1989  
(Percent of Each Region's V/P Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Personal Reasons	47%	40%	44%	7%	44%
2. Visit Friends/Relatives	5	14	10	5	12
3. Attractions/Appeal	8	14	5	64	9
4. Long Time Desire	17	15	18	9	15
5. Recommended By Others	11	9	9	19	8
6. Business	-	-	-	-	-
7. Advertising/Promotion	6	4	5	-	4
8. Price/Discount Considerations	4	4	4	-	4
9. Wanted To Cruise	6	3	1	-	1
10. Trip Extension	3	3	3	-	2
11. Curiosity	2	2	2	-	3
12. Cool Weather	1	2	-	-	1
13. Visit All 50 States	1	1	2	-	2
14. Other	4	2	5	1	3



## Travel History of Alaska Visitors

Vacation/Pleasure visitors to each region of Alaska are well-traveled, especially those VPs visiting Southwest. During the past five years, Southwest VPs have traveled outside the Continental U.S. more than three times on average, and on trips of 2000 miles or more nearly four times. Vacation/Pleasure visitors to other regions travel somewhat less than Southwest VPs, but still took an average of more than three long trips during the past five years. (See Table V-C-4)

Among visitors to all regions the top five vacation destinations visited by VPs in the past five years include Europe, Hawaii, California, Canada, and Florida (Table V-C-5).

Southwest VPs are somewhat different in their past vacation destination choices than other region's VPs. The Caribbean is an important past vacation choice, as well Australia/New Zealand. While VP visitors to other regions of Alaska have visited the Midwest, Arizona and Nevada in the past five years, none or very few of Southwest VPs have visited these destinations.

Alaska has been a vacation choice in the past five years for less than one in ten of each region's visitors. A higher proportion of Southwest's VP visitors have been to Alaska before than any other region's.

Table V-C-4

### Vacation Travel Frequency – Past Five Years By Region Visited Vacation/Pleasure Visitors – Summer 1989 (Number of Trips Excluding Recent Alaska Trip)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
Outside Continental United States	2.7	2.7	2.4	3.4	2.5
2,000+ Miles	3.4	3.3	3.1	3.7	3.4

Table V-C-5

**Past Five Years – Vacation Destinations  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Each Region's V/P Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Europe	37%	38%	32%	39%	37%
2. Hawaii	22	25	20	37	23
3. California	24	26	25	27	26
4. Canada	28	29	32	31	31
5. Florida	22	24	23	17	25
6. Mexico	18	15	12	11	13
7. Washington/Oregon	14	17	17	10	18
8. Midwest States	15	14	17	-	16
9. Caribbean	15	11	5	20	9
10. New England	13	14	18	12	17
11. Arizona	9	10	12	1	14
12. Nevada	9	8	6	-	8
13. Australia/New Zealand	8	10	10	14	13
14. Alaska	4	7	5	8	3

## Information Sources

Major sources of information for Vacation/Pleasure visitors planning a trip to Alaska include travel agents, brochures, books and commercial organizations such as tour companies and airlines. Travel agents play the largest role among VPs, with usage ranging from 57% of Interior/Northern VPs to 78% of Southwest VPs.

Brochures and books, particularly the State of Alaska Official Vacation Planner, are used by nearly half of the VPs to the Interior/Northern and Denali/McKinley regions, making this a very important source of information for these visitors. Nearly three out of ten Southeast VPs and four out of ten Southcentral VPs use the Planner. The Planner is also used by VPs to Southwest, but less frequently. Next to travel agents, Southwest VPs rely heavily on commercial organizations for information. One half of all regions visitors obtain information from commercial organizations, primarily from fishing lodges and guides. Other regions' VPs also rely on commercial organizations for information, including AAA, cruise lines and tour companies.

General media, previous visits, and government organizations other than the Division of Tourism all play a role in providing much needed trip information for VPs to all regions.

See V-C-6

### Trip Information Sources By Region Visited Vacation/Pleasure Visitors - Summer 1989 (Percent of Each Region's V/P Visitors)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
Travel Agent	77%	64%	57%	78%	60%
Brochures/Books	40	52	62	34	61
State Vacation Planner	29	37	46	18	45
Friends/Relatives	12	15	14	14	18
Commercial Organizations	20	22	22	48	23
General Media	7	8	11	8	10
Previous Visit	3	2	3	11	2
Government Organizations (Other Than Div. of Tourism)	2	3	3	-	5
Other	1	1	-	1	1

## Frequent Flyer Program Use

Frequent flyer programs, now available from all major airlines, play a role in Vacation/Pleasure travel to Alaska. Table V-C-7 shows the percentage of Domestic Air users who had a member in their traveling party using a frequent flyer program.

Denali/McKinley and Southcentral VPs have the highest proportion of Domestic Air users using a frequent flyer program. Both these regions have the highest use of frequent flyer programs among all VPs with one in five VP parties including someone who used a frequent flyer program. (This figure is calculated by multiplying the percentage of Domestic Air users by the percentage of VP visitors using Domestic Air. For example, 30% of VPs using Domestic Air had someone in their party using frequent flyer mileage. 69% of VPs to Southcentral used Domestic Air.  $30\% \times 69\% = 21\%$ .)

VP visitor parties to Southeast had the lowest overall usage of frequent flyer programs, with 8% of total VP parties using. This is a reflection of the large number of visitors who use cruiseships to enter or exit Alaska and also may use low-cost air add-ons offered by the cruiselines.

Table V-C-7

### Use Of Frequent Flyer Mileage By Region Visited Vacation/Pleasure Visitors – Domestic Air Users -Summer 1989 (Percent of Each Region's V/P Visitors)

	South-east	South-central	Interior/ Northern	South-west	Denali/ McKinley
<b>Yes</b>	19%	30%	27%	20%	31%
<b>No</b>	81	70	73	80	69
<b># In Party Using</b>					
One	33	30	4	34	33
Two	52	53	66	64	59
Three	4	2	4	—	—
Four	4	8	3	3	2
Five	4	6	20	—	5
Six Or More	3	1	3	—	2
<b>% of Total V/P Parties with Frequent Flyer Mileage User</b>	<b>8%</b>	<b>21%</b>	<b>16%</b>	<b>17%</b>	<b>20%</b>

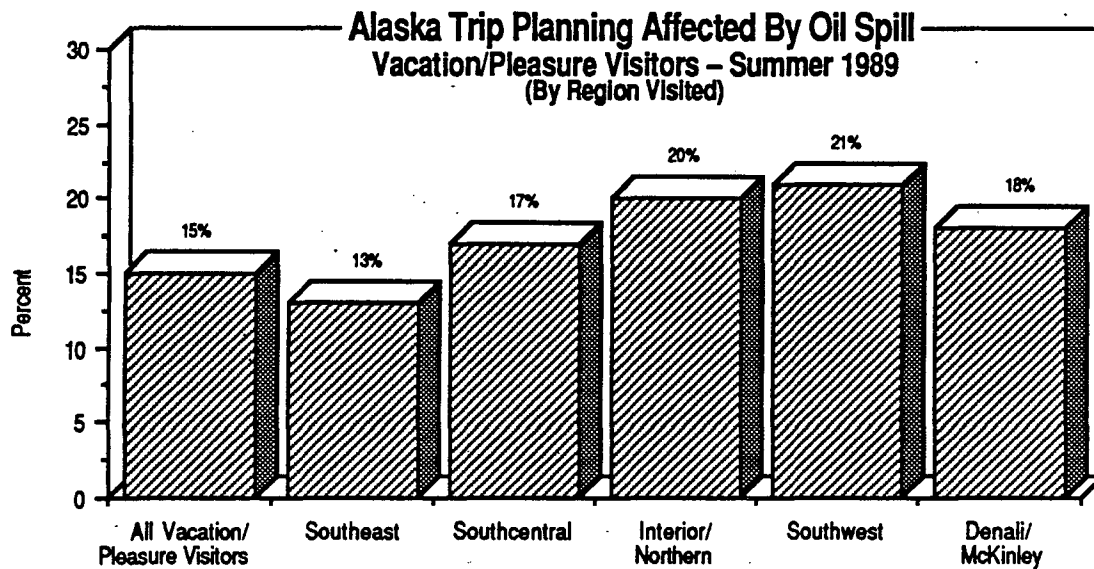
## Impacts of Exxon Valdez Oil Spill on Trip Planning

Vacation/Pleasure visitors to all regions indicated some impact to their travel plans as a result of the Exxon Valdez Oil Spill of March 24, 1989. VP visitors to Southwest indicated the most impact to planning. When asked how the spill actually affected their planning, most expressed unhappiness in some way rather than actually indicating major travel plan changes.

Visitors to regions other than Southwest indicated travel changes, mostly related to avoiding the spill-affected areas. One in five Interior/Northern VP visitors, indicated changes in travel plans, which involved primarily eliminating spill areas. Both Interior/Northern and Denali/McKinley VPs are the most widely traveled around the state. The elimination of the Prince William Sound area from their travels meant a loss of Vacation/Pleasure visitors to this area.

Many VPs visiting Southcentral and Southeast also indicated that the spill affected their travel plans. Most comments related to avoiding the spill area

Graph V-C-2



**How Oil Spill Affected Trip Planning  
By Region Visited  
Vacation/Pleasure Visitors Affected By Spill – Summer 1989  
(Percent of Each Region's V/P Visitors)**

	<b>South- east</b>	<b>South- central</b>	<b>Interior/ Northern</b>	<b>South- west</b>	<b>Denali/ McKinley</b>
1. Avoided the Area	53%	44%	58%	12%	59%
2. Didn't Go Fishing As Planned	-	4	5	-	-
3. Came To Visit Spill Worker	-	4	-	-	-
4. Wouldn't Travel By Water	-	2	2	-	2
5. Went To Valdez To Learn More Firsthand	2	1	2	-	2

## Travel Agent Involvement

Travel agents play an important role in trip planning for Vacation/Pleasure visitors to all regions. VPs to Southeast and Southwest have the highest usage of travel agents, with more than three out of four using travel agents. VP visitors to the Interior/Northern region have the lowest usage, yet well over half of this region's VPs use travel agents.

Table V-C-9 on the opposite page outlines the functions travel agents perform for these visitors. Southeast VPs use travel agents more heavily for providing brochures and booking a cruise or other packaged tour than other regional VPs. A large portion of Southcentral, Interior/Northern and Denali/McKinley VPs also use travel agents for these functions. Southwest VPs rely more on travel agents to book independent lodging and transportation than any other regional Vacation/Pleasure visitors.

Travel agents for VP visitors to all regions are also involved in recommending transportation, trip type, places of interest, travel companies, and lodging, but to a lesser degree than other functions. Travel agents also recommend Alaska as a vacation destination, but only to a small percentage of each region's VP visitors.

Graph V-C-3

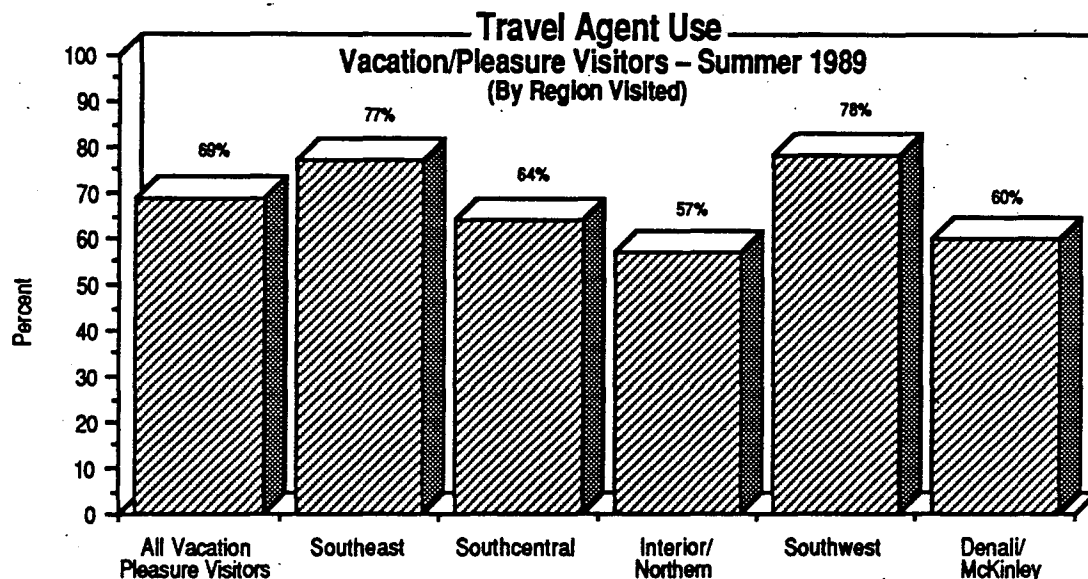


Table V-C-9

**Travel Agent Functions  
By Region Visited  
Vacation/Pleasure Visitors – Summer 1989  
(Percent of Each Region's V/P Visitors Who Use Travel Agents)**

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
1. Provided Brochures	62%	45%	44%	14%	45%
2. Booked Cruise or Packaged Tour	64	40	42	13	41
3. Recommended Transportation Or Trip Type	29	22	19	18	18
4. Booked Independent Lodging/Transportation	15	21	19	49	20
5. Recommended Specific Place of Interest	15	13	16	2	16
6. Recommended Travel Company	16	12	11	3	11
7. Recommended Lodging	9	11	13	2	11
8. Recommended Alaska	11	7	7	2	6
9. Other	6	7	5	7	6



## **D. Demographics**

### **Education**

Vacation/Pleasure visitors to all regions are well-educated. VPs to Southwest are the most highly educated with one-third having attended or completed graduate school and three-quarters having graduated from college. Over half of VPs to all regions have attended or graduated from college.

### **Household Income**

Average household income among VP visitors to all regions of Alaska tends to be very high, especially those who visit Southwest. Half of the visitors to this region have incomes of \$100,000 or more. Among VP visitors to other regions, one-third or more have incomes of \$50,000 or more.

### **Visitor Age**

Vacation/Pleasure visitors to Alaska tend to be older than visitors overall. This is true for all regions except Southwest, where, at 46, VP visitors are younger than average. Vacation/Pleasure visitors to the other regions tend to fall within similar age ranges.

### **Visitor Gender**

A few major differences exist in gender composition among VP visitors to each region. The more traditional male-oriented activities, such as fishing, which are popular for visitors to Southwest account for the high percentage of males to the region. On the other hand, VP visitors to Southeast tend to be slightly more female than male, most likely due to the higher proportion of females aboard cruiseships. The remaining regions have a nearly even split of males to females.

### **Visitor Employment**

Visitors to Southwest are more likely to be employed than visitors to any other region, a reflection of their lower average age. On the other hand, Interior/Northern visitors are more likely to be retired. Visitors to the Interior/Norther region also have a higher average age and a slightly lower average income than visitors to other regions. This is an indication of the high proportion of retirees in the Interior/Norther region group. Southeast and Denali/McKinley VPs are somewhat more likely to be retired than employed, whereas Southcentral VPs are slightly more likely to be employed than retired.

### **Visitor Origin**

The West has been and continues to be an important source of VP visitors for all regions of the state. This is especially true for VP visitors to Southwest. Other important producers of VPs for all regions include the Midwest, the South and the East. Canada produces a fair amount of VP visitors for Southeast and Interior/Northern regions, but is less important to the other regions. Overseas visitors are particularly important to the Southwest region and are growing in importance to other regions.

Table V-D-1

**Demographics**  
**By Region Visited**  
**Vacation/Pleasure Visitors – Summer 1989**  
 (Percent of Each Region's V/P Visitors)

	South- east	South- central	Interior/ Northern	South- west	Denali/ McKinley
<b>Visitor Education</b>					
Not High School Graduates	6%	5%	6%	9%	5%
High School Graduates	30	28	36	6	32
1 – 3 Years College	23	21	18	12	16
College Graduate	18	20	18	41	20
Attended or Completed Graduate School	23	26	23	34	27
<b>Visitor Household Income (Average Income)</b>					
	<b>\$58,000</b>	<b>\$58,800</b>	<b>\$52,700</b>	<b>\$84,900</b>	<b>\$55,600</b>
Under \$25,000	12%	16%	14%	10%	15%
\$25,000 – \$34,999	18	14	20	12	18
\$35,000 – \$49,999	25	23	26	4	24
\$50,000 – \$74,999	19	18	23	15	20
\$75,000 – \$99,999	12	11	6	9	10
\$100,000 and Over	14	17	11	50	13
<b>Visitor Age (Average Age)</b>					
	<b>53</b>	<b>52</b>	<b>54</b>	<b>46</b>	<b>53</b>
Under 18 Years	6%	6%	5%	1%	5%
18 – 24 Years	3	4	3	7	4
25 – 34 Years	5	8	5	9	7
35 – 44 Years	10	11	10	19	9
45 – 54 Years	15	18	15	36	16
55 – 64 Years	26	25	23	14	23
65 – 74 Years	28	26	34	14	32
75 + Years	6	5	5	<1	4
<b>Visitor Gender</b>					
Male	46%	51%	49%	82%	48%
Female	54%	49%	51%	18%	52%
<b>Visitor Employment</b>					
Employed	41%	45%	35%	74%	39%
Retired	45	40	51	17	46
Other	14	14	14	8	14
<b>Visitor Origin</b>					
West	30%	32%	27%	42%	27%
California	17	12	12	14	9
Washington	5	6	5	17	5
Midwest	19	21	25	10	27
South	19	21	22	16	19
East	15	12	9	15	11
Canada	12	6	11	–	7
Overseas	5	8	7	16	9
Germany/Switzerland/Austria	2	4	4	11	5
Japan	<1	1	1	1	1



## **Chapter VI. Selected Summary Profiles**

- A. Trip Purpose Profiles**
- B. Mode Use Profiles**
- C. Origin Profiles**

# Chapter VI: Selected Summary Profiles

## A. Trip Purpose Profiles

- Vacation/Pleasure (VP) visitors are the largest trip purpose group during the summer months, comprising 69% of the total market. Those visiting friends and relatives (VFRs) are the second largest group at 16% of the market, followed by Business and Pleasure visitors (9%) and Business Only visitors (7%).
- The overall trip satisfaction rating is very high for all trip purpose groups, with Vacation/Pleasure and Business & Pleasure visitors giving Alaska a high overall average of 6.3, those visiting friends and relatives 6.2, and Business Only visitors a slightly lower 5.9.
- Seven out of ten Business & Pleasure (B&P) visitors and nearly the same number of VFR visitors plan to visit Alaska for vacation in the next five years. All trip purpose groups indicate a high likelihood for recommending Alaska for vacation.
- Domestic Air is the most used transportation mode for all trip purpose groups except VPs, who use both Domestic Air and Cruiseship heavily.
- Among trip purpose groups, Business Only (BO) visitors stay in Alaska the longest (16 nights), VPs stay the shortest (9 nights).
- VPs stay the longest aboard cruiseships, VFRs stay the longest in private homes, as do B&Ps. Business Only visitors stay longest in hotel/motels.
- VPs travel in the largest parties, 2.5 people on average; BOs travel in the smallest parties, 1.4 people on average.
- VPs travel on a packaged tour more often than other trip purpose groups. VFRs are primarily independent travelers with one third purchasing sightseeing while in the state. B&Ps are also independents with three out of ten purchasing sightseeing, while very few independent BOs purchase sightseeing.
- Southeast Alaska receives more VPs than any other trip purpose group. On the other hand, Southcentral not only sees a large portion of VPs, but also the majority of VFRs, B&Ps and BOs. One in four VFRs visits Southeast, Interior/Northern, and Denali/McKinley; four of ten B&Ps visit Southeast, while one in four visit Interior/Northern and two in ten visit Denali/McKinley. A third of BOs visit Southeast and Interior/Northern, while one-quarter visit Southwest. Very few BOs visit Denali/McKinley.
- Anchorage sees the largest proportion of all trip purpose groups. Juneau hosts six out of ten VPs, but considerable less from other trip purpose groups. Most visited communities by VFRs include Anchorage, Palmer, Kenai/Soldotna; the top three for B&Ps and BOs include Anchorage, Juneau and Ketchikan.

- The most visited attraction for all trip purpose groups except VPs is Portage Glacier. The top attraction for VPs is the Inside Passage followed by Mendenhall Glacier.
- B&Ps make the decision to come to Alaska, on average, well before other trip purpose groups; BOs have the shortest decision making timeline for both the "When Alaska" decision and for making trip arrangements.
- Travel Agents are used by BOs than any other trip purpose group. However, BOs use travel agents for only a few functions, primarily to book independent reservations. Travel agents provide other trip purpose groups brochures, recommend types of travel arrangements and make reservations.
- Personal reasons are the main reason for VPs traveling to Alaska in 1989; visiting friends and relatives is the main reason for VFRs traveling; personal reasons and business/convention are cited by B&Ps as main reasons and business/convention is the main reason for BOs.
- VPs and B&Ps are the most well-traveled trip purpose group; VFRs the least. Past popular destinations for VPs and VFRs include Europe, Hawaii, South Atlantic State California and Canada. Past popular destinations for B&Ps and BOs include Hawaii, South Atlantic States, California and Canada.
- Alaska tops the list as the next probable vacation destination for all trip purpose groups except VPs, where Europe heads the list. One in four VFRs and B&Ps plan to return to Alaska on their next vacation.
- Average household income is highest among BOs and lowest among VFRs. VPs are the oldest Alaska visitors averaging 50 years old, while B&Ps are the youngest at 38. All trip purpose groups are well educated with more than four in ten having attended or graduated from college. Most visitors are employed, particularly BOs and B&Ps. The trip purpose group with the most retired is VPs.
- The West accounts for most visitors in all trip purpose groups, particularly the business-related visitors. The Midwest and South are important sources of pleasure-oriented visitors (VPs and VFRs).

## Trip Purpose Profile Summary All Visitors - Summer 1989

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
<b>Market Significance</b>					
% of Total Visitors	100%	69%	16%	9%	7%
<b>Visitor Opinions (1 - 7 Scale)</b>					
Overall Trip Satisfaction Rating	6.3	6.3	6.2	6.3	5.9
<b>Value for the Money Ratings of:</b>					
Accommodations	5.2	5.3	5.2	4.5	5.0
Transportation To Alaska	5.5	5.6	5.5	5.4	3.3
Transportation From Alaska	5.5	5.5	5.2	5.4	4.0
Transportation Within Alaska	5.5	5.6	5.4	4.8	5.0
Sightseeing/Attractions	6.0	6.0	6.2	6.3	6.0
Activities	5.7	5.6	5.8	6.0	6.0
Restaurants	5.2	5.2	5.3	5.0	4.4
Friendliness/Helpfulness	5.5	6.3	6.2	5.8	6.1
Overall	5.5	5.5	5.3	5.3	5.5
<b>Repeat Visits In Next 5 Years</b> (% Committed for Vacation)	39%	30%	67%	70%	30%
<b>Will Recommend Alaska for Vacation</b> (%Very Likely)	89%	89%	90%	87%	83%
<b>Travel Patterns</b>					
<b>Entry Mode</b>					
% Domestic Air	52%	36%	88%	78%	95%
% Cruiseship	27	38	-	9	-
% Highway/Private Vehicle	13	16	9	9	-
% Ferry	5	6	2	2	-
% International Air	3	3	-	2	5
<b>Exit Mode</b>					
% Domestic Air	53%	39%	83%	78%	92%
% Cruiseship	26	35	2	11	4
% Highway/Private Vehicle	12	15	8	8	-
% Ferry	5	7	2	2	-
% International Air	4	4	5	1	5
<b>Mode Use</b>					
% Domestic Air	63%	52%	90%	82%	95%
% Cruiseship	36	50	2	13	4
% Highway/Private Vehicle	16	20	10	9	-
% Ferry	8	11	3	3	-
% International Air	4	4	5	2	6
<b>Length of Stay</b> (Average # of Nights)	10.9	9.2	15.7	11.7	16.3

## Trip Purpose Profile Summary All Visitors – Summer 1989

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
<b>Travel Patterns (Con't)</b>					
<b># of Nights In Lodging Types</b>					
Hotel/Motel	1.9	1.8	1.0	2.7	4.4
Resort/Lodge	0.6	0.6	0.4	0.5	0.7
Bed and Breakfast	0.3	0.2	0.1	0.8	0.6
Cruiseship	1.8	2.5	0.1	0.6	0.3
Ferry	0.2	0.3	0.1	0.1	–
RV/Campground	1.9	2.3	1.4	1.4	–
Private Home	3.4	1.2	11.7	5.3	1.4
<b>Average Party Size</b>	<b>2.3</b>	<b>2.5</b>	<b>2.0</b>	<b>2.0</b>	<b>1.4</b>
<b>Travel Type</b>					
% Package Tour	42	56	3	17	19
% Independent	37	25	64	55	78
% Inde-Package	21	20	32	28	4
<b>Places Visited</b>					
<b>Regions Visited</b>					
% Southeast	60	72	24	41	34
% Southcentral	68	64	81	75	76
% Interior/Northern	35	39	23	27	32
% Southwest	8	6	9	6	26
% Denali/McKinley	34	40	25	19	5
<b>Top 10 Communities Visited</b>					
<b>(% Visiting)</b>					
1. Anchorage	66	62	78	74	76
2. Juneau	48	60	13	33	24
3. Ketchikan	44	55	13	24	22
4. Skagway	36	48	7	15	6
5. Fairbanks	30	34	20	23	18
6. Sitka	24	33	3	10	6
7. Seward	24	25	29	15	7
8. Kenai/Soldotna	22	19	32	31	15
9. Palmer	21	17	38	23	16
10. Homer	19	17	29	21	16
<b>Top 10 Attractions Visited</b>					
<b>(% Visiting)</b>					
1. Portage Glacier	46	40	69	35	69
2. Inside Passage	44	57	7	26	13
3. Mendenhall Glacier	38	49	10	24	10
4. Glacier Bay	35	46	5	21	10
5. Ketchikan Totems	34	43	9	20	19
6. Denali/McKinley	34	40	25	19	5
7. Skagway Historical District	34	44	5	20	8
8. Anchorage Museum of History & Art	29	29	39	19	21
9. University of Alaska Fairbanks	24	28	17	14	12
10. Kenai River	23	21	33	29	20



## Trip Purpose Profile Summary All Visitors – Summer 1989

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
<b>Travel Planning – Alaska Trip</b>					
% Considered Other Destinations	25%	25%	27%	22%	–
<b>Alaska as Destination Timing Decision</b> (Average # Months Before Trip)	8.1	8.3	7.7	8.9	3.7
<b>Travel Arrangements Made</b> (Average # Months Before Trip)	4.7	5.0	3.4	6.0	1.6
<b>Travel Agent Role</b>					
% Provided Brochures	42%	50%	20%	28%	4%
% Recommended Alaska	7	9	–	12	–
% Recommended Mode/Type of Trip	22	25	12	18	4
% Recommended Travel Company	11	13	4	12	–
% Booked Tour/Cruise	38	49	3	14	–
% Booked Independent Reservations	19	17	20	18	52
% Didn't Use Travel Agent	35	31	53	41	17

### Travel Planning – Alaska Trip

#### Reason for Alaska Trip in 1989

##### (% Mentioning)

1. Personal Reasons	32%	40%	11%	22%	–
2. Visit Friends and Relatives	24	12	84	15	8
3. Attractions/Appeal of Alaska	12	13	6	24	–
4. Long Time Desire	11	15	1	3	–
5. Recommended by Others	8	10	6	1	–
6. Business/Convention	6	–	–	22	86
7. Advertising and Promotion	4	5	–	1	–
8. Price/Discount Considerations	4	4	1	5	–
9. Wanted to Cruise	3	5	–	1	–
10. Trip Extension	2	3	1	–	–

### Travel Planning – General

#### Outside Continental U.S. Vacations

(Average # Last 5 Yrs. Excluding AK. Trip) 2.6 2.7 1.8 2.8 2.6

#### 2,000 Mile Plus Vacations

(Average # Last 5 Yrs. Excluding AK. Trip) 3.1 3.3 2.3 3.3 2.9

#### Past Vacation Destinations

##### (% Visiting)

1. Europe	26%	35%	26%	9%	–
2. Hawaii	26	24	14	32	56
3. South Atlantic States	26	29	39	32	41
4. California	22	25	34	40	–
5. Canada	22	29	20	20	56
6. Mexico	13	16	12	24	–
7. Mid-West States	12	14	19	12	41
8. Caribbean	10	13	8	10	–
9. New England States	10	13	10	3	41
10. Alaska	7	4	16	17	–

## Visitor Profile Summary Trip Purpose – Summer 1989

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
<b>Travel Planning—General (Con't)</b>					
<b>Next Probable Vacation Destination: (% Planning to Visit)</b>					
1. Alaska	14%	10%	24%	25%	12%
2. Europe	11	16	17	7	8
3. Hawaii	6	9	8	—	14
4. South Atlantic States	6	10	10	7	—
5. Canada	5	8	2	6	9
6. Mexico	3	4	—	13	5
7. California	3	5	5	5	5
8. Caribbean	3	4	1	6	7
9. New England States	2	3	3	7	5
10. Australia/New Zealand	2	2	3	3	3
<b>Demographics</b>					
<b>Total Household Income/Earnings</b>					
Average (\$000)	56.8	59.4	38.4	61.1	65.9
% Under \$35,000	34%	30%	66%	23%	19%
% \$35,000-\$50,000	21	22	15	23	12
% Over \$50,000	44	48	19	54	69
<b>Average Age</b>	<b>49</b>	<b>50</b>	<b>45</b>	<b>38</b>	<b>41</b>
<b>Gender</b>					
% Male	51%	49%	45%	59%	83%
% Female	49%	51%	55%	41%	17%
<b>Education</b>					
% High School or Less	30%	33%	36%	13%	6%
% Some College	22	22	23	24	24
% College Degree	22	21	18	30	25
<b>Employment Status</b>					
% Employed	52%	46%	55%	77%	100%
% Retired	33	38	28	5	—
% Other	15	15	17	17	—
<b>Origin</b>					
% West	38	34	39	66	68
% Midwest	20	19	23	10	5
% South	16	18	16	12	20
% East	12	12	18	3	—
% Canada	8	10	2	6	2
% Overseas	5	6	2	2	5

## B. Mode User Profiles

- Almost two-thirds (63%) of all visitors arrived or departed Alaska by Domestic Air, the largest mode user group. One-third used Cruiseship, 16% used the highway, 8% used the Ferry and 4% used International Air.
- All most user groups rated their overall trip satisfaction very high, with Cruiseship users averaging the highest overall rating at 6.4.
- Approximately four in ten in every mode user group, except Cruiseship, indicated they intended to visit Alaska again for vacation in the next five years. Somewhat fewer (about one in six) Cruiseship users indicated an intention to visit again in the next five years. However, more than eight in ten in each user group would recommend Alaska as a place for vacation.
- Cruiseship, Highway, Ferry and International Air users are primarily Vacation/Pleasure visitors. Domestic Air is also used heavily by Vacation/Pleasure visitors, however, more VFRs and business-related visitors use this mode than the other four modes.
- Ferry users stay in Alaska the longest (16 nights), while Cruiseship users stay the shortest (7.0 nights).
- Users of Domestic Air, Ferry and International Air stay longer in hotels than other mode user groups. Users of the Highway, Ferry and International Air modes stay in rv/campgrounds six nights or more on average, the longest use of any lodging type by any users groups.
- The smallest average party size is found among Domestic Air users (2.2); the largest among Ferry users (2.7)
- Nearly all Cruiseship users are traveling on a packaged tour, while one-third or less of the the remaining mode user groups use packages. Highway users are the most Independent, however, Ferry users have the highest percentage of Inde-Package visitors (those purchasing sightseeing while in Alaska).
- All Cruiseship and Ferry users visit Southeast, while most Highway users, but somewhat less Domestic Air and International Air users make it to this region. Southcentral is visited by most users of Domestic Air, Highway, Ferry and International Air modes. The Interior/Northern and Denali/McKinley regions see a large percentage of Highway and Ferry users, but a third or less of the other mode users. Southwest captures mostly users of Domestic and International Air.
- Anchorage is the most visited community for all mode user groups except Cruiseship, where Juneau is number one. The Inside Passage is the most visited attraction for Cruiseship and Ferry users; Portage Glacier for Domestic Air, Highway and International Air users.

- Ferry and Highway users decide to visit Alaska ten months on average before departure, the longest of any user group; International Air users decide on average 7.5 months before departure, the shortest. International Air users also make their trip arrangements on average closer to their departure than any group; Cruiseship users the furthest from departure.
- Travel agents are used most by Cruiseship users and used least by Highway users. Travel agents perform a variety of functions for all user groups, including providing brochures, recommending travel options and making reservations.
- Personal reasons lead the list of reasons for traveling to Alaska for Cruiseship, Highway and Ferry users. Visiting friends and relatives is the top reason for Domestic Air and International Air users.
- International Air users are the most well-traveled of the user groups, averaging nearly four vacations of 2,000 miles or more in the past five years. Europe is the top past vacation destination for Cruiseship and International Air users, Canada for Highway and Ferry users, and the South Atlantic States for Domestic Air users.
- Alaska tops the list as the next probable vacation destination for Highway, Ferry, Domestic Air and International Air users. Europe is the most favored next destination for Cruiseship users.
- Average household income is the highest among Cruiseship and Domestic Air users at \$60,000 and \$58,300 respectively. International Air users have the lowest average income at \$45,000. International Air users are also the youngest of the mode user groups at an average of 42, while Cruiseship users have the highest average age of 56 years.
- International Air users are the most highly educated, with nearly six in ten having attended or completed college. Nearly half of Domestic Air and Cruiseship users have attended or completed college, while just over one-third of Highway and Ferry users have done so. Domestic Air and International Air users have the lowest proportion of retired among their users, while Cruiseship users have the highest.

## Mode User Profile Summary All Visitors - Summer 1989

	Domestic Air	Cruiseship	Highway P.V.	Ferry	Int'l Air
<b>Market Significance</b>					
% of Total Visitors	63%	36%	16%	8%	4%
<b>Visitor Opinions (1 - 7 Scale)</b>					
Overall Trip Satisfaction Rating	6.3	6.4	6.1	6.3	6.2
<b>Value for the Money Ratings of:</b>					
Accommodations	5.1	5.8	4.7	4.8	5.2
Transportation To Alaska	5.6	5.9	4.5	5.1	5.5
Transportation From Alaska	5.4	5.8	4.8	5.3	5.2
Transportation Within Alaska	5.5	5.9	5.1	5.1	5.0
Sightseeing/Attractions	6.1	6.0	5.9	6.0	5.7
Activities	5.7	5.7	5.4	5.5	5.6
Restaurants	5.1	5.5	4.9	4.6	5.1
Friendliness/Helpfulness	6.2	6.5	6.1	6.1	6.4
Overall	5.4	5.8	5.1	5.2	5.4
<b>Repeat Visits In Next 5 Years</b> (% Committed for Vacation)	44%	17%	43%	40%	38%
<b>Will Recommend Alaska</b> for Vacation (%Very Likely)	89%	90%	86%	90%	81%
<b>Travel Patterns</b>					
<b>Main Trip Purpose</b>					
% Business Only	10%	1%	—%	—%	9%
% Business & Pleasure	11	3	5	3	4
% Vacation/Pleasure	57	95	85	92	68
% VFR	22	1	10	5	19
<b>Entry Mode</b>					
% Domestic Air	82%	24%	3%	7%	24%
% Cruiseship	15	76	2	—	2
% Highway/Private Vehicle	1	—	83	36	4
% Ferry	1	—	13	57	1
% International Air	1	—	—	—	69
<b>Exit Mode</b>					
% Domestic Air	83%	27%	2%	11%	11%
% Cruiseship	14	72	—	—	3
% Highway/Private Vehicle	1	1	78	25	—
% Ferry	1	—	19	63	1
% International Air	2	—	1	—	84
<b>Length of Stay</b> (Average # of Nights)	11.8	7.0	13.4	16.4	13.8

## Mode User Profile Summary All Visitors - Summer 1989

	Domestic Air	Cruiseship	Highway P.V.	Ferry	Int'l Air
<b>Travel Patterns--(Con't.)</b>					
<b># of Nights in Lodging Types</b>					
Hotel/Motel	2.5	1.4	1.7	2.9	2.6
Resort Lodge	0.8	0.2	0.1	0.2	1.6
Bed & Breakfast	0.3	-	0.1	0.5	0.2
Cruiseship	1.6	5.1	-	-	0.1
Ferry	0.1	-	0.6	2.1	2.8
RV/Campground	0.6	-	8.6	7.7	5.6
Private Home	4.9	0.1	1.9	1.9	2.4
<b>Average Party Size</b>	<b>2.2</b>	<b>2.5</b>	<b>2.5</b>	<b>2.7</b>	<b>2.4</b>
<b>Travel Type</b>					
% Package Tour	36%	95%	8%	17%	21%
% Independent	41	2	59	30	49
% Inde-Package	23	3	34	54	30
<b>Places Visited</b>					
<b>Regions Visited</b>					
% Southeast	46%	100%	70%	100%	21%
% Southcentral	85	50	75	75	98
% Interior/Northern	35	27	77	73	27
% Southwest	12	1	1	2	30
% Denali/McKinley	36	30	61	65	36
<b>Top 10 Communities Visited (% Visiting)</b>					
1. Anchorage	83%	48%	73%	74%	98%
2. Juneau	41	98	27	72	11
3. Ketchikan	32	90	29	81	9
4. Skagway	26	71	53	59	11
5. Fairbanks	31	26	61	65	24
6. Sitka	13	54	16	45	5
7. Seward	24	12	42	38	29
8. Kenai/Soldotna	24	2	42	33	30
9. Palmer	22	4	45	27	19
10. Homer	20	3	39	31	23
<b>Top 10 Attractions Visited (% Visiting)</b>					
1. Portage Glacier	57%	22%	52%	56%	78%
2. Inside Passage	36	100	29	76	8
3. Mendenhall Glacier	34	80	18	53	9
4. Glacier Bay	27	82	14	23	15
5. Ketchikan Totems	25	70	21	60	7
6. Denali/McKinley	36	30	61	65	36
7. Skagway Historical District	25	62	52	51	13
8. Anchorage Museum of History & Art	35	27	35	28	37
9. University of Alaska Fairbanks	24	20	57	62	18
10. Kenai River	26	4	37	32	34

## Mode User Profile Summary All Visitors – Summer 1989

	Domestic Air	Cruiseship	Highway P.V.	Ferry	Int'l Air
<b>Travel Planning – Alaska Trip</b>					
% Considered Other Destinations	26%	25%	19%	24%	30%
<b>Alaska as Destination</b>					
<b>Timing Decision</b>					
(Average # Months Before Trip)	7.7	8.6	9.8	10.0	7.5
<b>Travel Arrangements Made</b>					
(Average # Months Before Trip)	4.5	6.1	4.2	4.4	3.5
<b>Travel Agent Role</b>					
% Provided Brochures	38%	76%	19%	30%	52%
% Recommended Alaska	6	15	1	4	6
% Recommended Mode/Type of Trip	21	37	5	14	20
% Recommended Travel Company	10	22	2	6	4
% Booked Tour/Cruise	33	87	8	13	13
% Didn't Use Travel Agent	32	7	73	59	30

### Travel Planning – Alaska Trip

#### Reason for Alaska Trip in 1989

##### (% Mentioning)

1. Personal Reasons	26%	49%	42%	44%	19%
2. Visit Friends and Relatives	35	3	13	10	32
3. Long Time Desire	9	19	15	15	3
4. Recommended by Friends/Relatives	8	13	4	7	11
5. Business/Convention	9	1	2	2	4
6. Attractions/Appeal of Alaska	14	8	4	6	33
7. Advertising/Promotion	2	8	1	1	4
8. Price/Discount Considerations	3	5	–	1	1
9. Wanted to Cruise	2	9	–	1	1
10. Trip Extension	1	2	6	5	3

### Travel Planning – General

#### Outside Continental U.S. Vacations

(Average # Last 5 Yrs. Excluding AK. Trip)

2,000 Mile Plus Vacations	2.5	2.6	2.3	2.6	3.6
(Average # Last 5 Yrs. Excluding AK. Trip)	3.0	3.3	2.9	3.1	3.7

#### Past Vacation Destinations

##### (% Visiting)

1. Europe	32%	40%	21%	25%	73%
2. Hawaii	26	23	15	19	21
3. South Atlantic States	35	29	28	34	7
4. California	32	24	19	22	21
5. Canada	23	22	43	35	14
6. Mexico	15	18	12	16	5
7. Mid-Western States	15	16	19	16	7
8. Caribbean	12	19	3	5	3
9. New England	14	14	10	13	1
10. Alaska	8	1	8	4	6

## Mode User Profile Summary All Visitors – Summer 1989

	Domestic Air	Cruiseship	Highway P.V.	Ferry	Int'l All
<b>Travel Planning – General (Con't)</b>					
<b>Next Probable Vacation Destination:</b>					
(% Planning to Visit)					
1. Alaska	15%	1%	21%	17%	14%
2. Europe	14	25	8	10	41
3. Hawaii	10	10	2	5	11
4. South Atlantic States	8	11	10	8	2
5. Canada	5	8	14	10	5
6. Mexico	4	5	3	7	2
7. California	5	5	5	3	–
8. Caribbean	5	6	–	2	1
9. New England States	4	3	4	4	–
10. Australia/New Zealand	3	2	1	3	3

### Demographics

#### Total Household Income/Earnings

	\$58.3	\$60.0	\$46.3	\$53.8	\$45.0
Average (\$000)					
% Under \$35,000	35%	24%	42%	40%	54%
% \$35,000-\$50,000	19	26	26	19	13
% Over \$50,000	48	50	31	40	34

<b>Average Age</b>	<b>47</b>	<b>56</b>	<b>48</b>	<b>49</b>	<b>42</b>
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#### Gender

% Male	52%	44%	52%	47%	61%
% Female	48%	56%	48%	53%	39%

#### Education

% High School or Less	24%	34%	49%	34%	32%
% Some College	22	25	19	20	34
% College Degree	23	20	16	19	24

#### Employment Status

% Employed	57%	43%	38%	38%	56%
% Retired	28	47	44	45	18
% Other	15	11	17	17	26

#### Origin

% West	47%	31%	26%	33%	14%
% Midwest	19	21	21	21	–
% South	19	20	12	17	2
% East	12	18	5	10	–
% Canada	2	7	31	1	8
% Overseas	2	3	5	7	76



## C. Origin Profiles

- The largest percentage (87%) of visitors to Alaska during Summer 1989 arrived from the remaining 49 states. Of these visitors, four in ten originated from the Western U.S. Canada accounts for 8% of all visitors and Overseas arrivals total 5% of visitors, with most of these arriving from Europe.
- Visitors from all origins give Alaska high marks overall for trip satisfaction, with those from the Midwest giving Alaska the highest average rating (6.4).
- Visitors from the West and Japan indicate the highest interest in returning to Alaska in the next five years for vacation, 48% and 50% respectively. On the other hand, visitors from Germany/Switzerland/Austria indicate the lowest interest at 23%. However, nearly 80% or more of all origin groups indicate a high likelihood for recommending Alaska for vacation.
- Vacation/Pleasure visitors make up the largest trip purpose group among all origin groups. Visitors from California, the East, Canada and Overseas have the highest proportion of VPs among them. Visitors from Washington state have the highest proportion of business-related visitors among them.
- Domestic Air is the primary transportation mode used for visitors from the U.S., followed by Cruiseship. However, the primary mode for Canadians is Highway, followed by Cruiseship. The primary mode for Overseas visitors is International Air, followed by Domestic Air.
- Visitors from the U.S. stay in private homes longer than any other lodging type, for an average of nearly four nights. Hotels/motels are used by visitors from U.S. origin points for an average of 2 nights. Canadians stay longest in rv/campgrounds, as do visitors from Overseas.
- Visitors from Overseas, particularly Germany/Switzerland/Austria, travel in the largest groups. Visitors from Washington state have the smallest party size of any origin group, 1.8 persons on average.
- Visitors from the U.S., particularly California, the Southern and Eastern states, tend to travel on a package tour more often than visitors from other origin points. The Japanese have the highest proportion of Independent visitors, while those from the Midwest and Germany/Switzerland/Austria have the highest proportion of Independent Package visitors.
- Of all the Alaska regions, Southcentral sees the highest proportion of visitors from all origin points, except Canada. This is especially true for visitors from Overseas countries. Southeast Alaska benefits from visitors from all origin points with at least half of all visitors from each origin area except Overseas, visiting the region.
- Anchorage is the most visited community by all visitors, except those from Canada, California and the East. The top destination for Canadians is Skagway. Juneau ranks highest among Californians.

- The Inside Passage rates as the most visited attraction by visitors from the U.S. (except Washington state) and Canada. Portage Glacier is the most visited attraction for Overseas visitors, as well as those from Washington state. Denali/McKinley also rates very highly among Overseas visitors.
- Canadians have the shortest lead time when making the decision to travel to Alaska; those from Germany/Switzerland/Austria the longest. Easterners make their travel arrangements, on average, further from their travel date than any other group, nearly six months ahead of time. The Japanese, on the other hand, make their travel arrangements on average only 2 months prior to departure, the shortest lead time of any group.
- Travel agents are used by two-thirds or more of all origin groups except Canadians. Easterners and those from Germany/Switzerland/Austria use agents more than any other group (83%). Agents primarily provide brochures, recommend travel arrangements and make reservations.
- The primary reasons for traveling to Alaska this year cited by visitors from the U.S. were personal or to visit friends and relatives. Business/convention was a primary reason for visitors from Washington state. For Canadians personal reasons were the leading reasons, however, many expressed a long time desire to see Alaska. Leading reasons for Overseas visitors included personal reasons, visiting friends and relatives and the attractions/appeal of Alaska. The attractions and appeal of Alaska were particularly important for the Japanese.
- Overseas visitors are the most well-traveled of all origin groups, averaging 4 vacations of 2,000 miles or more in the past five years. Primary past destinations for Overseas visitors have been Europe, Canada and Hawaii. Primary past destinations for visitors from the U.S. include South Atlantic States, Europe, California, Hawaii and Canada.
- Europe tops the list as the next most probable destination for visitors from the U.S. and Germany/Switzerland/Austria, followed by Alaska. For Canadians, Canada and Alaska are the next most probable destinations. For Japanese, however, Alaska tops the list.
- Visitors from California, the South and Japan are the most affluent, averaging more the \$65,000 household income. Those from Germany/Switzerland/Austria have the lowest average income at just over \$40,000 on average. Overseas visitors have the youngest average age, with the Japanese the youngest at 38 years old on average. Visitors from the East are the oldest at 54.
- Visitors from all origin points are highly educated, especially those from Japan where half have graduated from college. Most visitors from Washington state and Japan are employed, while Midwesterners and Easterners have higher rates of retirees among them.

## Origin Profile Summary All Visitors - Summer 1989

	U.S.	← West →		Mid-west	South	East	
		Total	CA.				WA.
<b>Market Significance</b>							
% of Total Visitors	87%	39%	14%	11%	18%	17%	12%
<b>Visitor Opinions (1 - 7 Scale)</b>							
Overall Trip Satisfaction Rating	6.3	6.2	6.2	6.2	6.4	6.3	6.4
<b>Value for the Money Ratings of:</b>							
Accommodations	5.2	5.2	5.4	5.1	5.1	5.2	5.6
Transportation To Alaska	5.5	5.5	5.7	5.6	5.5	5.5	5.3
Transportation From Alaska	5.5	5.5	5.6	5.6	5.4	5.5	5.3
Transportation Within Alaska	5.5	5.4	5.4	5.6	5.7	5.5	5.7
Sightseeing/Attractions	6.1	6.1	5.9	6.2	6.1	6.0	6.1
Activities	5.7	5.8	5.8	5.9	5.7	5.6	5.6
Restaurants	5.2	5.0	5.2	5.9	5.2	5.3	5.4
Friendliness/Helpfulness	6.2	6.1	6.3	5.9	6.3	6.3	6.3
Overall	5.5	5.5	5.6	5.4	5.4	5.4	5.7
<b>Repeat Visits In Next 5 Years</b> (% Committed for Vacation)	40%	48%	39%	60%	34%	33%	34%
<b>Will Recommend Alaska</b> for Vacation (%Very Likely)	89%	87%	87%	86%	93%	89%	86%
<b>Travel Patterns</b>							
<b>Main Trip Purpose</b>							
% Business Only	7%	12%	6%	26%	2%	8%	-%
% Business & Pleasure	9	14	10	25	5	6	3
% Vacation/Pleasure	66	59	75	40	73	71	74
% VFR	17	16	10	9	20	15	24
<b>Entry Mode</b>							
% Domestic Air	58%	65%	54%	81%	55%	56%	43%
% Cruiseship	28	22	37	7	26	31	49
% Highway/P.V.	9	9	4	7	14	8	4
% Ferry	4	4	5	4	4	5	4
% International Air	-	-	-	-	-	-	-
<b>Exit Mode</b>							
% Domestic Air	59%	63%	48%	78%	52%	60%	58%
% Cruiseship	26	23	39	10	29	28	34
% Highway/P.V.	9	8	4	9	13	7	5
% Ferry	5	5	6	3	6	5	3
% International Air	1	1	2	-	-	-	-
<b>Mode Use</b>							
% Domestic Air	70%	73%	62%	86%	69%	71%	65%
% Cruiseship	37	28	46	14	42	42	55
% Highway/P.V.	12	11	6	10	18	11	6
% Ferry	8	7	9	5	9	8	7
% International Air	1	2	2	<1	-	<1	-
<b>Length of Stay</b> (Average # of Nights)	11.3	10.8	9.9	8.8	12.5	10.9	12.0

## Origin Profile Summary All Visitors - Summer 1989

	Canada	Total Overseas	Germany/ Switzerland/ Austria	Japan
<b>Market Significance</b>				
% of Total Visitors	8%	5%	2%	1%
<b>Visitor Opinions (1 - 7 Scale)</b>				
Overall Trip Satisfaction Rating	6.1	6.3	6.3	6.2
<b>Value for the Money Ratings of:</b>				
Accommodations	5.3	5.1	4.6	5.1
Transportation To Alaska	5.5	5.5	5.4	4.6
Transportation From Alaska	5.6	5.3	5.1	4.6
Transportation Within Alaska	5.5	5.0	4.5	4.5
Sightseeing/Attractions	6.0	5.7	5.8	4.9
Activities	5.7	5.4	5.5	5.0
Restaurants	5.5	4.9	4.8	4.9
Friendliness/Helpfulness	6.2	6.3	6.5	6.2
Overall	5.5	5.4	5.1	5.3
<b>Repeat Visits In Next 5 Years</b> (% Committed for Vacation)	42%	31%	23%	50%
<b>Will Recommend Alaska for Vacation</b> (%Very Likely)	88%	86%	83%	78%
<b>Travel Patterns</b>				
<b>Main Trip Purpose</b>				
% Business Only	2%	6%	1%	17%
% Business & Pleasure	6	3	2	5
% Vacation/Pleasure	88	85	89	76
% VFR	4	6	8	-
<b>Entry Mode</b>				
% Domestic Air	8%	14%	18%	-%
% Cruiseship	27	9	-	-
% Highway/P.V.	58	13	23	-
% Ferry	6	6	6	5
% International Air	-	56	53	95
<b>Exit Mode</b>				
% Domestic Air	6%	18%	12%	7%
% Cruiseship	26	15	16	-
% Highway/P.V.	55	11	16	5
% Ferry	9	4	4	-
% International Air	4	52	53	88
<b>Mode Use</b>				
% Domestic Air	13%	24%	29%	7%
% Cruiseship	32	16	15	-
% Highway/P.V.	62	16	25	5
% Ferry	13	10	11	5
% International Air	4	60	68	95
<b>Length of Stay</b> (Average # of Nights)	6.0	12.4	13.3	10.6

## Origin Profile Summary All Visitors - Summer 1989

	U.S.	← West →		Mid-west	South	East
		Total	CA.	WA.		
<b>Travel Patterns--(Con't.)</b>						
<b># of Nights In Lodging Types</b>						
Hotel/Motel	2.0	1.9	1.8	2.2	2.1	2.3
Resort/Lodge	0.6	0.7	1.1	0.6	0.4	0.6
Bed & Breakfast	0.3	0.4	0.4	0.5	0.2	0.3
Cruiseship	1.9	1.5	2.5	0.7	2.1	2.1
Ferry	0.2	0.2	0.2	0.1	0.2	0.2
RV/Campground	1.8	1.7	1.0	1.4	2.7	1.3
Private Home	3.7	3.2	2.3	2.9	4.7	3.9
<b>Average Party Size</b>	<b>2.3</b>	<b>2.2</b>	<b>2.3</b>	<b>1.8</b>	<b>2.2</b>	<b>2.4</b>
<b>Travel Type</b>						
% Package Tour	43%	32%	48%	19%	45%	52%
% Independent	35	49	36	60	20	29
% Inde-Package	22	19	17	21	35	19
<b>Places Visited</b>						
<b>Regions Visited</b>						
% Southeast	58%	52%	65%	51%	60%	60%
% Southcentral	71	69	58	73	75	78
% Interior/Northern	34	29	30	24	47	40
% Southwest	8	11	10	19	4	8
% Denali/McKinley	34	24	21	17	54	38
<b>Top 10 Communitles Visited</b>						
<b>(% Visiting)</b>						
1. Anchorage	69%	66%	54%	72%	74%	77%
2. Juneau	50	43	63	34	54	55
3. Ketchikan	45	39	52	33	47	44
4. Skagway	35	24	38	12	47	37
5. Fairbanks	30	23	25	21	41	38
6. Sitka	24	20	31	11	24	27
7. Seward	24	20	15	19	31	27
8. Kenai/Soldotna	23	26	11	32	23	19
9. Palmer	22	21	5	24	27	24
10. Homer	20	18	10	16	24	22
<b>Top 10 Attractions Visited</b>						
<b>(% Visiting)</b>						
1. Portage Glacier	47%	45%	35%	49%	49%	51%
2. Inside Passage	45	38	52	26	47	48
3. Mendenhall Glacier	40	33	48	22	42	50
4. Glacier Bay	36	31	46	17	37	38
5. Ketchikan Totems	36	31	38	28	35	35
6. Denali/McKinley	34	24	21	17	54	38
7. Skagway Historical District	32	24	32	14	37	37
8. Anchorage Museum of History & Art	30	25	15	18	39	33
9. University of Alaska Fairbanks	24	17	27	10	33	32
10. Kenai River	12	12	9	10	16	10

## Origin Profile Summary All Visitors – Summer 1989

	Canada	Overseas	Germany/ Switzerland/ Austria	Japan
<b>Travel Patterns—(Con't.)</b>				
<b># of Nights In Lodging Types</b>				
Hotel/Motel	1.0	2.3	2.7	3.4
Resort/Lodge	0.1	1.3	1.7	0.7
Bed & breakfast	—	0.3	0.3	0.2
Cruiseship	1.5	0.8	0.6	0.6
Ferry	0.3	0.2	0.2	0.1
RV/Campground	2.0	3.9	5.3	2.1
Private Home	0.6	3.2	1.9	4.1
<b>Average Party Size</b>	2.6	2.5	2.7	2.5
<b>Travel Type</b>				
% Package Tour	33%	28%	22%	20%
% Independent	51	45	42	68
% Inde-Package	16	27	37	12
<b>Places Visited</b>				
<b>Regions Visited</b>				
% Southeast	83%	44%	53%	15%
% Southcentral	39	88	91	100
% Interior/Northern	38	46	61	28
% Southwest	3	15	18	15
% Denali/McKinley	26	53	68	45
<b>Top 10 Communities Visited (% Visiting)</b>				
1. Anchorage	38%	87%	91%	98%
2. Juneau	43	27	26	8
3. Ketchikan	42	22	15	5
4. Skagway	61	30	44	—
5. Fairbanks	26	42	54	23
6. Sitka	31	20	21	3
7. Seward	18	25	32	20
8. Kenai/Soldotna	11	29	40	28
9. Palmer	16	20	29	8
10. Homer	13	24	33	18
<b>Top 10 Attractions Visited (% Visiting)</b>				
1. Portage Glacier	24%	68%	71%	80%
2. Inside Passage	42	25	24	3
3. Mendenhall Glacier	30	69	26	6
4. Glacier Bay	33	30	37	6
5. Ketchikan Totems	25	17	10	—
6. Denali/McKinley	26	53	68	48
7. Skagway Historical District	56	30	42	—
8. Area Museums of History & Art	18	27	34	18
9. University of Alaska Fairbanks	28	22	25	18
10. Kenai River	13	29	31	38

## Origin Profile Summary All Visitors - Summer 1989

	U.S.	← West →		Mid-west	South	East	
		Total	CA.				WA.
<b>Travel Planning - Alaska Trip</b>							
% Considered Other Destinations	26%	25%	24%	27%	22%	30%	27%
<b>Alaska as Destination</b>							
<b>Timing Decision</b> (Average # Months Before Trip)	8.1	7.3	7.5	6.9	8.9	8.1	9.3
<b>Travel Arrangements Made</b> (Average # Months Before Trip)	4.8	4.6	4.9	3.6	4.8	4.4	5.7
<b>Travel Agent Role</b>							
% Provided Brochures	43%	35%	46%	20%	45%	47%	53%
% Recommended Alaska	7	7	9	2	8	8	8
% Recommended Mode/Type of Trip	22	19	23	13	24	24	27
% Recommended Travel Company	11	10	17	7	10	14	11
% Booked Tour/Cruise	39	29	45	15	44	50	47
% Didn't Use Travel Agent	35	39	31	37	38	35	17

### Travel Planning - Alaska Trip

#### Reason for Alaska Trip in 1989

##### (% Mentioning)

	U.S.	Total	CA.	WA.	Mid-west	South	East
1. Personal Reasons	32%	32%	43%	14%	41%	26%	27%
2. Visit Friends and Relatives	27	29	21	41	29	19	28
3. Long Time Desire	11	9	13	1	13	12	16
4. Recommended By Others	8	6	7	3	5	10	18
5. Business/Convention	7	10	6	22	2	8	1
6. Attractions/Appeal of Alaska	11	15	16	27	9	7	7
7. Advertising/Promotion	3	3	2	2	3	6	2
8. Price/Discount Considerations	4	4	3	1	6	3	2
9. Wanted to Cruise	4	5	10	-	1	5	4
10. Trip Extension	1	1	1	-	-	2	2

### Travel Planning - General

#### Outside Continental U.S. Vacations

(Average # Last 5 Yrs. Excluding AK. Trip)

	U.S.	Total	CA.	WA.	Mid-west	South	East
2,000 Mile Plus Vacations (Average # Last 5 Yrs. Excluding AK. Trip)	2.5	2.6	2.9	2.5	2.1	2.5	2.6

#### Past Vacation Destinations

##### (% Visiting)

	U.S.	Total	CA.	WA.	Mid-west	South	East
1. Europe	30%	22%	28%	11%	28%	35%	55%
2. Hawaii	25	33	40	33	19	21	15
3. South Atlantic States	33	22	17	40	40	39	45
4. California	29	32	21	44	25	30	27
5. Canada	25	25	22	29	18	26	32
6. Mexico	17	18	22	10	16	17	15
7. Mid-Western States	16	14	11	20	28	12	5
8. Caribbean	13	11	17	15	10	12	22
9. New England States	14	14	15	13	13	15	14
10. Alaska	7	7	5	14	8	4	8

## Origin Profile Summary All Visitors – Summer 1989

	Canada	Overseas	Germany/ Switzerland/ Austria	Japan
<b>Travel Planning – Alaska Trip</b>				
% Considered Other Destinations	18%	28%	33%	13%
<b>Alaska as Destination Timing Decision</b> (Average # Months Before Trip)	7.0	9.0	10.0	7.6
<b>Travel Arrangements Made</b> (Average # Months Before Trip)	3.1	4.8	5.4	2.1
<b>Travel Agent Role</b>				
% Provided Brochures	38%	38%	34%	44%
% Recommended Alaska	6	4	6	–
% Recommended Mode/Type of Trip	19	15	10	22
% Recommended Travel Company	9	5	2	7
% Booked Tour/Cruise	31	26	20	11
% Didn't Use Travel Agent	48	34	17	32

### Travel Planning – Alaska Trip

#### Reason for Alaska Trip in 1989

(% Mentioning)	Canada	Overseas	Germany/ Switzerland/ Austria	Japan
1. Personal Reasons	40%	24%	26%	24%
2. Visit Friends and Relatives	4	15	21	5
3. Long Time Desire	16	3	1	–
4. Recommended By Others	5	7	1	5
5. Business/Convention	5	3	2	5
6. Attractions/Appeal of Alaska	5	32	32	57
7. Advertising/Promotion	4	5	–	5
8. Price/Discount Considerations	4	1	2	–
9. Wanted to Cruise	–	3	1	–
10. Trip Extension	8	13	11	–

### Travel Planning – General

#### Outside Continental U.S. Vacations

(Average # Last 5 Yrs. Excluding AK. Trip)      2.7      3.9      4.0      2.8

#### 2,000 Mile Plus Vacations

(Average # Last 5 Yrs. Excluding AK. Trip)      3.0      4.0      4.8      2.4

#### Past Vacation Destinations

(% Visiting)	Canada	Overseas	Germany/ Switzerland/ Austria	Japan
1. Europe	31%	60%	73%	48%
2. Hawaii	8	20	11	26
3. South Atlantic States	22	16	6	4
4. California	16	15	10	4
5. Canada	52	29	25	22
6. Mexico	14	5	5	–
7. Mid-Western States	16	–	–	–
8. Caribbean	5	4	4	–
9. New England States	6	1	–	4
10. Alaska	6	6	7	4



## Origin Profile Summary All Visitors – Summer 1989

	U.S.	← West →		Mid- west	South	East	
		Total	CA.				WA.
<b>Travel Planning – General (Con't)</b>							
<b>Next Probable Vacation Destination: (% Planning to Visit)</b>							
1. Alaska	13%	13%	10%	14%	12%	17%	10%
2. Europe	14	10	13	4	8	21	31
3. Hawaii	10	13	16	14	5	7	11
4. South Atlantic States	9	6	7	6	14	11	7
5. Canada	6	6	8	6	6	6	6
6. Mexico	5	8	9	12	3	2	1
7. California	5	6	1	12	6	1	2
8. Caribbean	5	4	2	1	4	8	3
9. New England States	4	5	4	8	2	4	–
10. Australia/New Zealand	2	2	1	3	2	2	1

### Demographics

<b>Total Household Income/Earnings</b>							
Average (\$000)	\$57.9	\$59.1	\$68.4	\$55.4	\$50.8	\$64.0	\$56.4
% Under \$35,000	33%	32%	22%	34%	42%	25%	31%
% \$35,000-\$50,000	21	19	22	21	17	23	18
% Over \$50,000	46	48	60	46	37	54	44
<b>Average Age</b>	49	47	47	46	51	49	54
<b>Gender</b>							
% Male	50%	55%	50%	66%	44%	50%	45%
% Female	50%	45%	50%	34%	56%	50%	55%
<b>Education</b>							
% High School or Less	26%	19%	16%	16%	40%	26%	26%
% Some College	23	28	30	34	22	18	18
% College Degree	22	22	22	19	20	22	25
<b>Employment Status</b>							
% Employed	52%	55%	54%	74%	48%	49%	48%
% Retired	35	30	30	19	40	35	40
% Other	14	14	16	8	12	16	12

## Origin Profile Summary All Visitors – Summer 1989

Travel Planning – General (Con't)	Canada	Overseas	Germany/ Switzerland/ Austria	Japan
<b>Next Probable Vacation Destination: (% Planning to Visit)</b>				
1. Alaska	20%	18%	12%	29%
2. Europe	13	35	54	8
3. Hawaii	–	1	–	4
4. South Atlantic States	12	4	–	–
5. Canada	21	4	10	–
6. Mexico	1	–	–	–
7. California	9	–	–	–
8. Caribbean	2	1	1	–
9. New England States	–	–	–	–
10. Australia/New Zealand	–	14	6	8

### Demographics

<b>Total Household Income/Earnings</b>				
Average (\$000)	\$47.3	\$49.3	\$41.4	\$64.3
% Under \$35,000	41%	44%	55%	37%
% \$35,000-\$50,000	19	49	18	16
% Over \$50,000	34	37	27	56
<b>Average Age</b>	46	42	43	38
<b>Gender</b>				
% Male	50%	60%	61%	64%
% Female	50%	40%	39%	36%
<b>Education</b>				
% High School or Less	65%	42%	36%	34%
% Some College	9	19	29	12
% College Degree	17	28	24	51
<b>Employment Status</b>				
% Employed	52%	53%	50%	62%
% Retired	33	16	16	5
% Other	15	29	34	32



# Appendix



# Appendix

## Methodology Summary

The Arrival Count (AC) is the method of counting all passengers (visitors and residents) who enter the state. The count is conducted by obtaining passengers counts from highway and cruiseship arrivals, through U.S. Customs records, and from airline and ferry carriers.

The *Random Arrival Survey (RAS)* then determines whether passengers are residents or non-residents. The ratio of sample composition is used to determine composition for the full passenger count. Since scientific sampling reflects the total population characteristics accurately, a high level of confidence exists in the true composition of all arrival figures. The resulting data in this report can be considered accurate within  $\pm 0.4\%$  to  $\pm 1.8\%$  at the 95% confidence level.

The *Random Arrival Survey* methodology is based on the personal interviewing of statistically selected passengers arriving by major modes of transportation at all principal points of entry. Passengers are sampled as they arrive at their first point of entry by domestic air, highway, cruiseship, Marine Highway and international air. Sampling is done at Anchorage, Fairbanks, Juneau, Ketchikan, Skagway, Alaska and Taylor highways, as well as on the ferry from Seattle and Prince Rupert to Ketchikan. Sampling began in June 1989 and will continue through May 1990. Traffic sampled at these locations is estimated to account for over 96% of all traffic entering Alaska by these modes.

The personal interview technique was selected as the methodology which would best minimize non-response and omit self selection bias, two problems common to travel research projects. Personal interviewing allows for control of the interviewing environment and scientifically accurate selection of respondents. Equally important, personal RAS interviewing has a positive effect on response to the *Visitor Opinion Survey* and *Visitor Expenditure Survey* phases of the program.

The *Visitor Opinion Survey (VOS)* methodology produced an overall response rate of 73%, an almost unheard-of response rate for a mail survey. The total usable returns were nearly 100%. The effectiveness of the VOS is attributed to the initial personal contact of the RAS interview, the professional appearance of the survey packet and the use of monetary incentives. The extremely high response rate guarantees accurate representation of all visitor types and therefore insures a high level of reliability in the data.

## The VOS Survey Packet

A VOS packet was mailed to every other RAS respondent volunteering their name -- 95% of all visitors approached. The "other" RAS respondent was requested to keep the *Visitor Expenditure Diary (VES)* during the stay. The VOS packets were mailed two to three months after their RAS interview, to give them the respondent time to complete their trip and unpack after returning home. Reminder postcards were mailed to all VOS recipients 7 days later.

The VOS packets were mailed in large envelopes with the blue and yellow eagle state logo next to the return address of "State of Alaska Survey, Data Decisions Group". The packets contained a cover letter on the State of Alaska Department of Commerce & Economic Development, Division of Tourism letterhead sign by Dana Brockway, Director, requesting the recipient's assistance to "help us make future visitor to Alaska more enjoyable and more interesting".

The packet included a small envelope containing a monetary incentive of \$1 for consumers and \$5 for business visitors, with the inscription "Data Decisions Group thanks you. Please come visit Alaska again." The appropriate foreign currency in equivalent amounts was used for non-U.S. visitors.

The 16-page survey itself, called the "State of Alaska Survey" was printed in 3-color, including the State colors and was bound in booklet form. The survey cover insured the recipients' confidentiality. The survey itself was coded to insure correct matching to its originating RAS survey to allow for a complete data base on each responding visitor. A return envelope with return postage of foreign exchange unit stamps completed the packet.

VOS packets were not sent to seasonal workers since they are not considered part of the marketing audience for Alaska tourism.

### A. Methodologies by Mode

RAS interviewing methodology is the same for each of the five modes surveyed. However, scientific sampling design and interview interception points vary by mode. The following provides an overview of the arrival count, sample design, and fielding methodologies by mode.

#### 1. Domestic Air

Domestic air arrival counts were obtained through a voluntary confidential reporting system. All domestic air carriers participated, making possible an analysis of the complete Alaska visitor market.

During the summer months of June through September, the *Random Arrival Survey* was administered by uniformed, professionally trained interviewers which met scientifically selected flights on 25 scientifically selected sample days at four points in Alaska; Anchorage, Fairbanks, Juneau and Ketchikan. Passengers were identified as residents or non-residents. Every "nth" non-resident was presented a small Alaska lapel pin and interviewed. The number of non-residents interviewed from each flight was four. More than 96% of the non-residents selected through this procedure completed the RAS interview.

## 2. Cruiseship

Cruiseship arrival count data was obtained through U.S. Customs offices in Ketchikan and Juneau, and verified through Cruise Line Agencies of Alaska.

For the cruiseship sample, random selection of 43 cruiseship voyages from June through September, was made based upon passenger loads. Four uniformed interviewers met each selected ship and interviewed every "nth" passenger as they came ashore. Interviewing procedure was the same as domestic air; the passenger was presented with the lapel pin and then interviewed. A target of 20 interviews were conducted from each vessel, with the sample distributed among passengers taking tours and not taking tours. Nearly all passengers approached agreed to be interviewed, with less than 2% refusing.

## 3. Marine Highway

RAS or Arrival count data for the Marine Highway was obtained from standard voyage reports generated by the purser's office and available from the Traffic Manager's office in Juneau.

From June through September, uniformed interviewers rode the ferry between Seattle and Ketchikan, and Prince Rupert and Ketchikan on 29 randomly selected voyages. (Voyages were selected in proportion to passenger loads). During the sailing, interviewers followed a predetermined skip pattern in each section of the vessel to determine resident/non-resident composition and insure random selection of respondents. Passengers were approached according to the skip pattern and the RAS was administered using the same procedure as other modes. Summer season target samples per voyage were 30 on the Seattle-Ketchikan run and 20 on the Prince Rupert-Ketchikan run. Nearly all passengers approached agreed to complete the interview, with a less than 1% refusal rate.



#### 4. Highway

Arrival count data was obtained from the U.S. Customs port director's offices in Alcan and Skagway and from U.S. Customs headquarters in Anchorage.

Three highway locations were sampled from June through September; the Alaska Highway at Alcan, the Taylor Highway at the Tok Junction, and the Klondike Highway at Skagway. Thirty-six sample periods were selected based upon traffic patterns and weighted in proportion to traffic volume. A tally of highway traffic was kept to determine resident/non-resident composition. Every "nth" vehicle was administered the *Random Arrival Survey* by uniformed interviewers immediately after clearing customs at Alcan and Skagway, and near the Tok Junction on the Taylor Highway. Only those highway travelers who were entering Alaska for the first time (rather than having arrived via ferry or visited somewhere in Alaska previously on this trip) were interviewed. Procedure for administering the RAS was the same as previous modes. Most visitors approached agreed to be interviewed with a refusal rate of less than 2%.

Motorcoach passengers were not interviewed for the Summer 1989 RAS. However, during each sample period, all motorcoaches were stopped and drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first on this trip. This information was used to determine the size of the first arrival motorcoach market.

#### 5. International Air

International Air arrival count data is obtained through U.S. Customs and Dynair (the company responsible for all ground arrangements for international air carriers) at the Anchorage International Airport.

From June through September international air passengers were administered the RAS on 25 statistically selected sample days by uniformed interviewers. All passengers deplaning on sample days were asked resident/non-resident status as they left U.S. Customs and every "nth" non-resident was interviewed. Sixteen interviews were conducted each sample day. To minimize non-response and to insure a representative sample of all visitors, interviewers were assisted by foreign language questionnaires (in Japanese and German), signs in the customs area, and Japanese, German and French-speaking interviewers.

#### B. Data Weighting Procedure

Following sample design and actual fielding, raw RAS results are then submitted to a statistical weighting procedure in the data processing phase. This sample weighting insures accurate expansion of sample results to the arriving passenger population.

The weighting is a multistage procedure and includes voyage and flight passenger loads, detailed arrival counts by mode, resident/visitor sample proportions at all sample points by mode, location and time period.

The VOS results are subjected to the same multistage weighting since each survey is matched to its originating RAS survey. Since seasonal workers were not included in the VOS sample, however, the data was then re-weighted to insure accurate extrapolation to actual visitor population numbers.

### C. Sample Size

The final result of the June-September 1989 summer season VOS program is a statistically reliable random sample of 1,134, with a maximum margin of error of  $\pm 3.0\%$  and a probable margin of error for most dichotomous (yes/no percentages) results of  $\pm 0.6\%$  to  $\pm 3.0\%$ . Margins of error for interval (scaled) results are extremely small, with most opinion ratings significantly different with a 0.1 point difference. The overall reliability of the VOS data is exceptionally high, especially given the very high rate of returns -- 73%. The average mail survey produces approximately 20% to 30% returns.

#### Visitor Opinion Survey Sample Distribution Summer 1989

Mode	Number of Interviews
Domestic Air	271
Cruiseship	351
Highway-Personal Vehicle	225
Ferry	149
International Air	138
<b>Total</b>	<b>1,134</b>

## D. Sample Reliability

### 1. For Dichotomous (yes/no, percentage-type) Data:

#### Visitor Opinion Survey Reliability Intervals At 95% Confidence Level

When Survey Result Is:	And Sample Size Is:	Then Maximum Margin Of Error Is:
1% or 99%	1,134	±0.6%
10% or 90%	1,134	±1.8%
20% or 80%	1,134	±2.5%
30% or 70%	1,134	±2.8%
40% or 60%	1,134	±2.9%
50% or 50%	1,134	±3.0%

This table reads: Given the sample size of 1,134, readers may be 95% certain than any statewide survey result is within a maximum of  $\pm 3.0\%$  of the true mean of the survey population.

### 2. For Interval (Scaled, Continuous, Mean, Rating-type) Data:

VOS results for scaled opinion ratings can be considered reliable to a tenth of a rating point. For example, a 6.1 rating on a 1 to 7 scale is significantly different from a 6.2 rating on the same scale. The margins of error of other VOS results expressed as mean whole numbers, such as average length of stay, depend on the standard error of the mean which is a function of the standard deviation and the sample size. As a rule, the reliability of these mean results is quite good.

### 3. Reliability by Entry Mode and Trip Purpose Subsamples

The *Visitor Opinion Survey* was designed to yield reliable subsamples of each entry mode's visitors. The margin of error ranges for entry and trip purpose categories are as follows. These should be considered when examining results in these subcategories.

#### VOS Subsample Minimum & Maximum Error Levels At 95% Confidence Level

Mode	Sample Size	Margin of Error When Survey Result is:	
		1% or 99%	50%
Domestic Air	271	±1.2%	±6.1%
Cruiseship	351	±1.0%	±5.4%
Highway-Personal Veh.	225	±1.3%	±6.7%
Ferry	149	±1.6%	±8.2%
International Air	138	±1.7%	±8.6%
<b>Main Trip Purpose</b>			
Vacation/Pleasure	892	±0.7%	±3.4%
Visiting Friends & Relatives	117	±1.8%	±9.4%
Business & Pleasure	71	±2.4%	±11.9%
Business Only	54	±2.8%	±13.8%

# States Within Geographic Census Regions

## WEST

### **Pacific Coast**

California  
Hawaii  
Oregon  
Washington

### **Mountain**

Arizona  
Colorado  
Idaho  
Montana  
Nevada  
New Mexico  
Utah  
Wyoming

## MIDWEST

### **West North Central**

Iowa  
Kansas  
Minnesota  
Missouri  
Nebraska  
North Dakota  
South Dakota

### **East North Central**

Illinois  
Indiana  
Michigan  
Ohio  
Wisconsin

## SOUTH

### **West South Central**

Arkansas  
Louisiana  
Oklahoma  
Texas

### **South Atlantic**

Delaware  
District of Columbia  
Florida  
Georgia  
Maryland  
North Carolina  
South Carolina  
Virginia  
West Virginia

### **East South Central**

Alabama  
Kentucky  
Mississippi  
Tennessee

## EAST

### **New England**

Connecticut  
Maine  
Massachusetts  
New Hampshire  
Rhode Island  
Vermont

### **Mid Atlantic**

New Jersey  
New York  
Pennsylvania

# Unsolicited Respondent Comments:

## Visitor Expenditure and Visitor Opinion Surveys

### General Comments:

"P.S. we loved Alaska – it is so beautiful and so big! Had no idea there were such fantastic waterfalls, mountain ranges and wildlife. I daydream about our beautiful trip all the time!"

"The people in Alaska top everyone for friendliness."

"It was a very nice vacation – the residents were very friendly – we especially appreciated the visitors centers and the museums – they were excellent. My favorite town was Palmer while my wife's favorite was Seward but overall it was our most enjoyable vacation and will recommend the trip to anyone – Thanks"

"You have a beautiful state! It sun-shined both days in Ketchikan and Juneau. We were most disappointed not to see more of the land. Will make sure we do next time. Thank you!"

"We were on a limited budget and also a limited time to do much travelling around. We did enjoy the grandeur of Alaska. . . . There is lots to offer for vacations in Alaska – "

"We only made the ride of seven days this September. Had a few hours each at Ketchikan, Juneau, Skagway and Wrangell. Loved each little town, walking or riding by bus in each. Made a seven week tour with friends in 1967 . . . I am 89 years old now, and still want to do it all over again. I'd love to live the rest of my life in your state – it is so beautiful. Take care of the wildlife and do not allow too much of the natural beauty to be destroyed."

"Thank you. It was great in Alaska."

"Greetings from Gelnhausen . . . For my wife and I the three weeks in Alaska were unforgettable. We can only recommend this beautiful country to everyone. We would also like to visit again someday."

"We enjoyed our visit in Alaska and we want to come back. That is why we bought a piece of land near Haines."

"Wonderful state and thanks for asking our opinion! It shows that you care – Florida could take a few lessons from you."

"We love your state very much, it sure beats Florida for hospitality and scenery. We hope to be back (health permitting) in two years."

"My husband has acute leukemia and this had been a life long dream to go to Alaska. Thanks to you people it was everything he had expected. He didn't get to fish for salmon but, Lord willing, maybe he can go next year."

"Permit me to say that all in our group loved Alaska, its people and everything about it. All in all, it was a MARVELOUS trip, which I hope to repeat some day."

"This has been my 10th or 11th trip to Alaska – it gets better every time – "

"Very disappointed. Most everything in Alaska is 'let's get the tourist'".

"Alaska is the most beautiful place I have ever seen – I urge everybody to visit, and plan to revisit every chance I get. Clean, vast, awesome, spectacular, super and gorgeous – Alaska is all of these and MORE!!"

"My trip to Alaska was a once in a lifetime experience I will treasure and remember for the rest of my life!"

"We enjoyed Alaska very much our 1st trip up north. Please let me know when they celebrate up there . . . we would like to go back."

"As I had only a stopover of less than an hour at the Anchorage airport on the way to Portland, Oregon, I unfortunately cannot contribute significantly to your survey . . . However, Alaska will one day be a vacation destination."

"Enjoyed the trip – I mainly wanted to see scenery. Lots of it there. Canada, (B.C., Yukon) rather primitive after leaving Dawson Creek."

"We have enjoyed all our trips to Alaska!"

"Enjoyed every minute!"

"This was just a scouting expedition. We are planning on coming back and really see Alaska in its entirety."

"Thank you for a great trip. We love you."

"We decided to drive to Alaska. Wish we had a lot more time. One month is not enough time. Want to go again for about three months. Didn't have enough time."

"We enjoyed our trip – was all we expected and want to fly back in winter to Anchorage to enjoy winter sights."

"I enjoyed the trip very much and would recommend to all my friends (and have). Expensive but worth it."

"Positive Aspects: Vast scenic wilderness, Mt. McKinley & Denali Park, Wildlife, Scenic railroads, glaciers. Negative aspects: Short tourist season, poor roads, over commercialism in some areas. Conclusion: One of the world's greatest areas of rugged scenic beauty!"

"Alaska is absolutely gorgeous – keep it that way. Please work to preserve all areas. Thanks for the hospitality – a great trip."

"All of us had a memorable trip to Alaska. Everyone was so friendly and helpful to us! I have recommended this trip to many people already. I hope to return to see the other cities I didn't see on this trip. Thank you!"

## Comments on the Survey Process

"How surprised I was to be greeted at the Airport in Alaska – Fairbanks – at 1:30AM. The interviewer was most pleasant and cordial. The pin I received was truly a most thoughtful gesture. My wife begged me for it. I would not give it up! Her friends in Fairbanks badgered me until I acquiesced and gave it to her. She wanted to give me the two she had bought nearly like it. But the one you presented to me is superior to anything one can buy there. I look at it when she wears it. I do not forget that once it was mine! So thanks for the memory. . . . Hope I can return – told my wife I will consider taking her along – as she did me this time – if I can at least wear that button as we cross the state line! Truly – I will not forget the marvelous days spent there. You have some of Gods GREAT COUNTRY AND MARVELOUS PEOPLE!"

"Thank you. It was great in Alaska. Money back for next client."

"Received the token dollar. It was a nice gesture. Thank you for inviting our response."

"Thank you for the dollar. That was nice of you. We love Alaska and will certainly come again if possible."

"Sending you back your dollar plus added one dollar to cover the cost of this survey – it was fun to remember."

"Thank you so much for thinking of Connie Chung for your questionnaire. At this time Ms. Chung is so tied up with her new program, Saturday Night With Connie Chung that she has no time. She is just swamped. So, she has asked me to return your five dollars as she must decline your request to answer the questions on the form."

"Thank you for your contribution of \$1.00 (Canadian). It took me 25 minutes to complete this questionnaire. That works out to about \$2.40 per hour. Minimum wage in Yukon is 5.95 per hour. UOI \$2.55. Please consider this \$2.55 as my contribution towards improving meal services on the Alaska State Ferries. I have been a visitor to your state on at least 30 occasions over the past 15 years and have always enjoyed Alaska thoroughly."

## U.S. Customs:

"I want to thank . . . the Alaska customs inspectors for extending their every courtesy."

"The reception by immigration and customs authorities in Anchorage was even worse than the welcome given by Norwegian authorities to people with dark skin! Improve this!"

## Advertising and Promotion:

### Positive Comments

"I want to thank the State of Alaska Division of Tourism . . . for extending their every courtesy. Also the helpful people at all the Visitor Centers I have visited which made my vacation an enjoyable one."

"The Alaskan Vacation ads on television are compelling. The vacation planner is excellent."

"Alaska Official Vacation Planner – Very good information"



"I had booked a Columbia Glacier Tour in addition to my trip to Fairbanks and Denali Park, but owing to a mistake by the travel agency in Australia I missed that. However, on my arrival in Anchorage, the tourist people there were simply great and they helped me tremendously in getting a flight from Anchorage to Valdez where I joined the tour that I should have been on for Columbia Glacier tour. I cannot speak too highly of your tourist people in Anchorage in enabling me to join the tour, I will certainly recommend them to others in Australia."

"Keep up the good work!"

#### Suggestions

"I feel that you have to promote more actively the different opportunities for tourists offered by the Alaska state, especially out of the United States in order that we can choose the option we prefer. The information should include all the possibilities of organized tours in existence."

"I think Alaska is missing a good thing by not developing Hyder as a tourist destination. With the road in Canada to Hyder and the beautiful drive, it makes a great trip. . . . The Salmon Glacier was beautiful and I would have liked to cruise on the Portland Canal at Hyder, but could not find any source."

"Many more people from Germany would very much like to fly to Alaska. But, it turns out to be a very expensive destination. . . . The advertising and promotional work in Germany, particularly on television and in magazines, seems insufficient to me. I have noticed again and again that people expect costs to be higher than they actually are. In particular, economical fly/drive packages with motorhomes to parks and fishing spots should be advertised more."

"Alaskan highways and the approaches through Canada are excellent. Advertise this fact in TV and other ads."

"Information on Alaska, particularly in winter, is very hard to obtain in Vancouver and other Canadian cities."

#### Exxon Valdez Oil Spill:

"Keep the pressure on Exxon!"

"Other than the crowds in Valdez, we personally saw no evidence of the oil spill."

#### Shopping and Prices:

At Denali: "We were . . . unpleasantly surprised by the fact that when we wanted to pay using VISA credit cards, we were systematically charged an additional 5% (sometimes on amounts of over \$2,000.)."

"In Skagway we shopped at a Train Gift Shop - I ordered an HO Caboose and paid cash for it. The clerk assured me the train would be sent to me in two weeks. Up to now I haven't received my train. This week I've tried to call and was informed the number is no longer available. . . . Of all the things we did and saw - this is the only flaw but I am indeed upset."

"Stores and attractions in Southcentral and Southeast Alaska close too early in the season. Ten years ago they were open in the first part of October."

"We were told by someone who had visited your state about four years ago that prices were very high (especially food). We did not find them to be excessively high – compared to Canadian prices."

"The shops did not have merchandise that depicted Alaska works since most of the goods were cheap fakes from other parts of the world. There were some exceptions, of course."

"Encourage cottage industries. Alaskan momentos made in Hong Kong are not attractive."

"Your clerks are so courteous and friendly. In the Eastern cities, they really don't care if they sell or not as they just seem to put in their eight hours as clerks and not salespeople. A clerk in Fairbanks wanted to get the twenty totem poles I wanted for gifts and called other places and they were brought to the store I was waiting in so I could have the amount I needed. This was the situation throughout Alaska."

". . . only disappointment was in Juneau where dozens of local Indians, on main street of town were drunk and 'brawling'. Not conducive to shopping area, nor safe for tourists. Other than that, cannot say enough good things about Alaskan experience except 'we want to return' with kids next year."

## Facilities and Accommodations:

### Negative

"The visit to McKinley was a disaster. Travel in the park nonexistent or permissible. Got bumped off our flight to Barrow, with guaranteed seats paid for 60 days in advance. Will never recommend that to anyone ever. . . I loved the overall hospitality found in Alaska."

"Denali with accommodations, lousy restaurant hours, general attitude of personnel would make us not want to go back, and along with terrible riding bus – we could not recommend this to any senior citizen!"

"A wonderful trip to Alaska was spoiled by our trip home. Our bus from the ship to Seattle was late and the plane left without us. We had to spend 11 hours in the airport. They did not have a hospitality room. I slept on a bench and caught a bad cold. A similar incident on one of my trips to Hawaii but we were well taken care of."

"I was shocked by the price of Alaska airlines in general, and Anchorage to King Salmon . . . outrageous, preposterous, and sadly discouraging. I do wish some competitive airline would come and barge in and explode the monopoly."

"The cruiseship SS Noordham was excellent in terms of comfort, service, food, and entertainment. The ports of call were less than inviting, although Sitka had the most charm of the three stops. None of the areas were inviting to the tourists – the ambience was one of locals tolerating the tourists. . . . The ports of call should be set up so that there are proper taxis with tour guides who are clean and presentable and enthusiastic about the state. . . ."

"Had one disappointed side trip – this could have been avoided. . . . In Skagway we signed up for the Carcross Yukon bus excursion. This trip was to take 6 hours, which would leave us one and one-half hour to walk around the town. This did not happen. The ship was one hour late getting in, next there were 15 to 20 minute road construction hold ups each was. It was hurry up and hurry back, with no time to see Skagway. I do think on the ship it should be mentioned that this could happen and you just can't do both. I won't miss Skagway the next time."

#### Positive

"We plan to see Alaska again in future but preferably from a cruise ship. Backpacking was a bit too strenuous."

"We would love to fly to Anchorage the next time and rent a car and auto-tour Alaska – or ferry our car in and out of Alaska."

"Dancers were the best – tour of Sitka not so good but dancers great"

#### Hunting, Fishing and Wildlife

"Our only disappointment was in not seeing more wildlife as we traveled – all videos and etc. we had seen prior to our departure gave us the impression we would be able to see them without going into the wilderness . . ."

"Sorry, I can't be any more enthusiastic about Alaska. A 7 day Inside Passage Cruise is just not long enough to really experience Alaska, we saw little of the Interior, wish we could have seen more wildlife, in fact we only saw two whales and they were quite far from the ship. The cruise was fabulous."

"I planned to take my finest distributor fishing to show appreciation for his work. My distributor made the arrangements. . . . I have only one huge complaint – that being the \$600 our company spent to allow 3 of us to fish and stay one night on the Kenai River. Thanks to your glorious fisheries dept. decision to close the river to bait-fishing at that time – I caught a 7-8# sockeye, my distributor caught a 11-14# Jack which he returned, and the 3rd person got a 13" Dolly Varden (June 18th). All those from a river known to be one of the greatest fishing rivers around. I'd find it hard to decide upon another fishing trip with my distributor unless the conditions were going to be ideal, especially when reservations have to be made in advance.

Outside of my one complaint, I have, and will continue to, enjoy my trips to Alaska, and will always recommend it as an important travel and vacation spot for others. . . . You may have your \$5 back as it has been good for me to tell you about this trip. I really do thoroughly enjoy Alaska."

"I could not believe the amount of visitors on the Kenai Peninsula. Wall to wall fishermen. On our next vacation to Alaska, we will do fly-in fishing trips and more remote type of sight seeing and other activities. We will NOT return to the Kenai Peninsula, TOO MANY PEOPLE and too many people fishing."

"When in Juneau we really enjoyed the tour to Mendenhall Glacier and it was good to see first hand how the salmon go up river to spawn. However, it seems that it could have been just a little bit a little cleaner so a person would not get it on your shoes – then it was a problem in the bus. We don't believe a person should be sheltered from reality but possibly a little cleaner. We are farmers and understand why you presented it –"

"This was a tour by motorcycle and camper. . . . Saw lots of wild animals including eagles and whales."

"I was in Alaska in 1982 and was on a privately planned tour and traveled to many points, and we all agreed that it was the best tour we had ever been on. This time I wanted to go fishing and enjoyed it very much, however, the King Salmon were not running yet. I would like to come back."

"About Fishing – After so many years, I consider that freshwater fishing in Interior/Northern, Denali/McKinley, and Southcentral, is decidedly inferior to what is commonly advertised in brochures if you are committed to fishing in road accessible areas. Only fly-in and boat charters will ensure excellent catches (but they are very expensive!)" It does not mean fishing is no good! but you have to really exert yourselves if you want to catch fish. . .

About Hunting – Since 1982 – big-game hunting (moose, caribou, goat, black bear) is out for non resident aliens, except with licensed guide. (average \$1000 a day!). I'd rather not comment on that discrimination, which is not founded on conservation concerns!

As for small game, it is not really worth it if you are confined to road accessible areas – Grouse, Ptarmigans and snowshoe hares are few and far apart. Waterfowl can be excellent but opening is late . . .

I pointed out to Fish and Game Dept (letter) that for a tourist driving into Alaska from Dawson City Yukon it is impossible to obtain a hunting/fishing license anywhere before Tok!!! I received a polite answer, stating they were going to try.

"Best regards and wishes -- will see you next year!"

## University of Alaska

"Although we don't plan to visit Alaska again in the near future, we will no doubt visit our granddaughter there when she attends the college. She loves Alaska more than ever, and talks about its beauty all the time."

"I am near retirement. As I looked about the University of Alaska . . . I thought how nice it would be to teach there just to experience the wilderness. Your summers are glorious – nothing experienced like it in my 60 years."

## Alcan and other Roads

"The worst thing I could say about Alaska is the bad road in some areas, but they are being worked on, we noticed."

"If I was in state government I would try to pass a bill that would to the following: all cars trucks or what ever is junk, store them back away from the highway. It seems every house we passed there were two or three cars parked next to road. I think it is a very ugly sight to see."

"Not impressed with the amount of junk cars etc. in all areas throughout Alaska. While still developing your state, it might be wise to consider an ordinance to require people and companies to dispose of this trash to beautify the state."

"The one overriding disappointment of the trip was the trash and garbage along the highway and in most of the towns. Fairbanks the worst of all."

"We traveled pickup and trailer all the way. Eat and sleep in trailer most of the time. Comments: Please more turn outs for autos. Cut trees short in front of the view areas. Love your state. My wife would like to see it in the winter."

"Hard surface the road from Chitina to Kennicott."

"We were on a private motor coach, so we cannot make any comment on transportation except some of the highways could be improved which is the case in nearly all states."

"We are glad we made the trip – we didn't 'enjoy' the Alaskan highway through Canada, but it was a part of the whole great trip. Want to fly in next trip but wouldn't have missed the scenery and experience of the drive this time."

"This was a quick trip – 6398 miles in 15 days – mainly to see what the inland was like after a 7-day cruise two years ago. We plan to go back as soon as we both can get vacation time. Probably fly one way and drive our own camper or motor home one way."

"Our trip was a wonderful introduction to Alaska. We would love to return and drive your highway and go further north."

"Someday my husband and I would like very much to motor-home back to and all over Alaska with the time to see the sights, fish, hunt, and do all the fun things your great state has to offer. Your friendly people inspired us."

"And your Alaskan folks were kind, gracious and always willing to give directions to the next town. We ran low on gasoline as I was driving and passed up a gas stop on a hill. I was turning around and a pickup truck came down off a hill and I motioned for him to stop (it was sure raining) and he did and told us the distance to the next town where gas was available and how far back the gas stop that I had passed. I knew we couldn't go or come and stood there wondering what to do and this young man said he had a can of gas that he would put in our truck. He did and we paid him as he would have to drive the twenty miles to replenish his extra gas.

## Ferry System

"Our agent had planned a similar trip for us in 1978 using Princess Lines and we specified this time we wanted to use the ferries. We were wanting to go to all of the cities on the Inland passage and spend time in each town, look up our overnight lodging spontaneously, but he advised against it."

"As a tourist on a budget, travelling to Alaska in winter is not the easiest. Whilst the ferry fare is reduced (which is a good incentive) the tourist facilities are largely not operating at that time of year. There was not shuttle bus service into Juneau for travellers such as ourselves who were not staying in hotels. Whilst we would have paid a bus fare we were not prepared to pay a taxi fare, hence we hitchhiked. Suggestion: the city transit system should go the extra distance on the infrequent occasion of the ferry arriving. Secondly, we wanted to visit the Mendenhall Glacier (which I'm sure is equally spectacular in winter as summer) and once again we had to get a city bus and then walked from the nearest stop. Most importantly: there is no bus or shuttle service out from Juneau to get on the Southbound ferry at 3am, which is very poor, and the Alaska Marine Highway should offer this particularly at that time of night."

## Alaska Railroad

"I would like to make a trip by train from Anchorage to Fairbanks. I am 71 years old and always travel by myself."

"Train trip was worst experience of our lives. Both ways the air conditioner was either inadequate and/or out of order."

"Open the old Copper River Railroad route from miles Glacier to Chitina. This is probably the most scenic 130 miles – Cordova to Chitina – in Alaska. It would provide a needed economic boost to an oil ravaged area."

## Parks

"I was disappointed with the quality of Alaska State RV parks. They do not compare to those of British Columbia Provincial Parks. A state as wealthy as Alaska should be able to do better."

"I personally found the campground facilities inadequate and below standard as far as sanitary conditions were concerned. For a country the size of Alaska there seemed to be an extreme water shortage."

"Please note that the campground accommodation would have got a better mark if firewood would have been supplied. We noticed damage to the tree growth in the campground due to people cutting for firewood. We would pay extra for 'on-sight-firewood'."

"Would be nice if the campgrounds could supply firewood like the Yukon and B.C. does!"

# Acknowledgements

The *Random Arrival Survey* and the *Arrival Count* phases of the *Alaska Visitor Statistics Program* rely a great deal on the cooperation and good will of many people and organizations involved in the Alaska visitor industry. We would like to thank the following for their assistance:

- The management and ground crews of the Domestic Air Carriers serving Alaska: Alaska Airlines, Delta Airlines, United Airlines, Northwest Airlines, Hawaiian Airlines, Morris Air, and Sun Country;
- The management and ground crews serving the International Air Carriers at Anchorage International Airport;
- The Alaska Marine Highway management and on-board personnel;
- The management, cruise directors and motorcoach coordinators for the cruise lines, as well as Cruise Line Agencies of Alaska;
- The U.S. Customs Service personnel at Anchorage, Alcan, Skagway, Juneau and Ketchikan.
- The Alaska State Troopers at Tok who assisted in setting up a stopping area for traffic on the Taylor Highway to insure proper sampling.

STATE OF ALASKA 1989-90 RANDOM ARRIVAL SURVEY

1. Are you a visitor to Alaska? (Please circle number)
  1. NO The survey is for visitors only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. YES (continue)
  
2. Is this the first stop in Alaska for you? (Circle number)
  1. NO The survey is for visitors at their first point of entry only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. YES (continue)
  
3. Which of these categories best describes the main purpose of this Alaska trip?  
(Circle one number only in first column)
  1. BUSINESS ONLY
  2. BUSINESS AND PLEASURE ----->
    - Will you add days beyond the business portion of your trip to accommodate pleasure activities?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  - >
    - Will you also be visiting friends/relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  3. VACATION/PLEASURE ----->
    - Will you also be visiting friends/ relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  4. VISITING FRIENDS OR RELATIVES ----->
    - Will you:
    1. Sightsee only in the local area in which your friends or relatives live, or
    2. Also sightsee in other areas of Alaska?
  5. SEASONAL/PIPELINE WORKER
  
4. How many nights do you plan to spend in Alaska on this trip? (Record number below. If none, record "0")

\_\_\_\_\_ No. of nights (Estimate: \_\_\_ Yes \_\_\_ No)
  
5. What mode of transportation will you use when you cross the Alaska state line leaving Alaska on this trip? (Circle number)
  1. AIR to USA
  2. AIR to foreign destination.
  3. COMMERCIAL CRUISESHIP
  4. ALASKA STATE FERRY
  5. HIGHWAY -----> Will you be taking your vehicle onto a ferry or cruiseship when you leave Alaska?
    1. NO
    2. YES - Circle appropriate number:
      3. Cruiseship or
      4. Ferry
  - > Which type of vehicle will you be using?
    1. AUTO
    2. CAMPER/RV
    3. MOTORCOACH
    4. OTHER \_\_\_\_\_
  6. COMMERCIAL BOAT/FREIGHTER
  7. PRIVATE BOAT
  8. MILITARY BOAT
  9. DONT KNOW/NOT SURE
  
6. Which type of travel best describes this trip? (Circle number)
  1. ON A PACKAGED TRIP
  2. COMPLETELY ON OWN
  3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE

"Packaging" - When you have both lodging and transportation and/or sightseeing prearranged and you pay a single price in advance.



7. Including yourself, how many are traveling in your immediate party sharing expenses such as food, lodging or local transportation?

\_\_\_\_\_ NO. IN PARTY

8. What are the ages and sex of these (Number...Answer to Q.7) people? (Record numbers in spaces)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. What is their employment status? (Record numbers in spaces below)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. In the last five years, how many other trips have you made to Alaska for pleasure? for business?

FOR PLEASURE \_\_\_\_\_ # OF TRIPS      FOR BUSINESS \_\_\_\_\_ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE RESPECTFULLY REQUEST YOUR NAME AND ADDRESS. WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOUR RETURN HOME. PLEASE HELP US MAKE THIS RESEARCH PROJECT OF VALUE TO US. THE STATE OF ALASKA THANKS YOU.

NAME: \_\_\_\_\_  
 FULL STREET ADDRESS: \_\_\_\_\_  
 CITY/STATE/PROVINCE: \_\_\_\_\_  
 COUNTRY: \_\_\_\_\_  
 ZIP CODE: \_\_\_\_\_

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**FOR INTERVIEWER/OFFICE USE ONLY:**

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_      INTERVIEWER #: \_\_\_\_\_

LOCATION: 1 KTN 2 INU 3 ANC 4 FAI 5 SKG 6 TOK 7 ALCAN

MODE: 01 Domestic Air    02 International Air  
 03 Cruise - Walk    04 Cruise - Tour  
 05 Ferry - PR        06 Ferry - SEA  
 07 Hwy - PV

SAMPLES: DOMESTIC AIR: 01 AS 02 DL 03 UA 04 NW 05 HA 06 Other Dom \_\_\_\_\_

Flight No. \_\_\_\_\_

INTERNATL AIR: 01 AF 02 BA 03 CL 04 DL 05 HA 06 IB 07 JL  
 08 KL 09 KE 10 LH 11 SN 12 SK 13 SR 14 Other Int'l \_\_\_\_\_

Flight No. \_\_\_\_\_

CRUISE: 01 Noordam    02 Nieuw Amst    03 Rotterdam    04 Westerdam  
 05 Fair Princ    06 Star Princ    07 Pac Princ    08 Sea Princ    09 Is Princ  
 10 Daphne        11 Regent Sea    12 Regent Sun    13 Sagafjord    14 Stardancer  
 15 Universe      16 R Viking Sea

FERRY: 01 Taku        02 Aurora        03 Malaspina    04 Mutanuska    05 Columbia

HWY: 01 Auto        02 Camper/RV    03 Other

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**STATE OF ALASKA 1989-90 RANDOM ARRIVAL SURVEY**


---

- 1. Are you a visitor to Alaska?** (Please circle number)
1. NO The survey is for visitors only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. YES (continue)
- 2a. Did you enter Alaska with your vehicle on a ferry or on a cruiseship?** (Circle number)
1. YES The survey is for visitors at their first point of entry only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. NO (continue)
- 2b. Did you enter Alaska by road at Haines, Skagway or Hyder?** (Circle number)
1. YES The survey is for visitors at their first point of entry only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. NO (continue)
- 3. Which of these categories best describes the main purpose of this Alaska trip?**  
(Circle one number only in first column)
1. BUSINESS ONLY
  2. BUSINESS AND PLEASURE ----->
    - Will you add days beyond the business portion of your trip to accommodate pleasure activities?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  - >
    - Will you also be visiting friends/relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  3. VACATION/PLEASURE ----->
    - Will you also be visiting friends/ relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  4. VISITING FRIENDS OR RELATIVES ----->
    - Will you:
    1. Sightsee only in the local area in which your friends or relatives live, or
    2. Also sightsee in other areas of Alaska?
  5. SEASONAL/PIPELINE WORKER
- 4. How many nights do you plan to spend in Alaska on this trip?** (Record number below. If none, record "0")
- \_\_\_\_\_ No. of nights (Estimate: \_\_\_ Yes \_\_\_ No)
- 5. What mode of transportation will you use when you cross the Alaska state line leaving Alaska on this trip?** (Circle number)
1. AIR to USA
  2. AIR to foreign destination
  3. COMMERCIAL CRUISESHIP
  4. ALASKA STATE FERRY
  5. HIGHWAY -----> Will you be taking your vehicle onto a ferry or cruiseship when you leave Alaska?
    1. NO
    2. YES - Circle appropriate number:
    3. Cruiseship or
    4. Ferry
  - > Which type of vehicle will you be using?
    1. AUTO
    2. CAMPER/RV
    3. MOTORCOACH
    4. OTHER \_\_\_\_\_
  6. COMMERCIAL BOAT/FREIGHTER
  7. PRIVATE BOAT
  8. MILITARY BOAT
  9. DONT KNOW/NOT SURE
- 6. Which type of travel best describes this trip?** (Circle number)
1. ON A PACKAGED TRIP
  2. COMPLETELY ON OWN
  3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE
- "Packaging" - When you have both lodging and transportation and/or sightseeing prearranged and you pay a single price in advance.

7. Including yourself, how many are traveling in your immediate party sharing expenses such as food, lodging or local transportation?

\_\_\_\_\_ NO. IN PARTY

8. What are the ages and sex of these (Number...Answer to Q.7) people? (Record numbers in spaces)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. What is their employment status? (Record numbers in spaces below)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. In the last five years, how many other trips have you made to Alaska for pleasure? for business?

FOR PLEASURE \_\_\_\_\_ # OF TRIPS      FOR BUSINESS \_\_\_\_\_ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE RESPECTFULLY REQUEST YOUR NAME AND ADDRESS. WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOUR RETURN HOME. PLEASE HELP US MAKE THIS RESEARCH PROJECT OF VALUE TO US. THE STATE OF ALASKA THANKS YOU.

NAME: \_\_\_\_\_

FULL STREET ADDRESS: \_\_\_\_\_

CITY/STATE/PROVINCE: \_\_\_\_\_

COUNTRY: \_\_\_\_\_

ZIP CODE: \_\_\_\_\_

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS \_\_\_\_\_

**FOR INTERVIEWER/OFFICE USE ONLY:**

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_      INTERVIEWER #: \_\_\_\_\_

LOCATION: 1 KTN 2 JNU 3 ANC 4 FAI 5 SKG 6 TOK 7 ALCAN

MODE: 01 Domestic Air    02 International Air  
 03 Cruise - Walk    04 Cruise - Tour  
 05 Ferry - PR    06 Ferry - SEA  
 07 Hwy - PV

SAMPLES: DOMESTIC AIR: 01 AS 02 DL 03 UA 04 NW 05 HA 06 Other Dom \_\_\_\_\_

Flight No. \_\_\_\_\_

INTERNATL AIR: 01 AF 02 BA 03 CL 04 DL 05 HA 06 IB 07 JL  
 08 KL 09 KE 10 LH 11 SN 12 SK 13 SR 14 Other Int'l \_\_\_\_\_

Flight No. \_\_\_\_\_

CRUISE: 01 Noordam    02 Nieuw Amst    03 Rotterdam    04 Westerdam  
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 10 Daphne    11 Regent Sea    12 Regent Sun    13 Sagafjord    14 Stardancer  
 15 Universe    16 R Viking Sea

FERRY: 01 Taku    02 Aurora    03 Malaspina    04 Matanuska    05 Columbia

HWY: 01 Auto    02 Camper/RV    03 Other

## STATE OF ALASKA 1989-90 RANDOM ARRIVAL SURVEY

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  2. YES (continue)
- 2a. Did you enter Alaska with your vehicle on a ferry or on a cruiseship? (Circle number)
1. YES The survey is for visitors at their first point of entry only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. NO (continue)
- 2b. Did you enter Alaska by road at Hyder, Haines, Alcan or on the Taylor Hwy? (Circle number)
1. YES The survey is for visitors at their first point of entry only. Please circle "1" and return this questionnaire to the person who gave it to you. Thank you.
  2. NO (continue)
3. Which of these categories best describes the main purpose of this Alaska trip? (Circle one number only in first column)
1. BUSINESS ONLY
  2. BUSINESS AND PLEASURE -----> Will you add days beyond the business portion of your trip to accommodate pleasure activities?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  - > Will you also be visiting friends/relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  3. VACATION/PLEASURE -----> Will you also be visiting friends/ relatives?
    1. YES
    2. NO
    3. DONT KNOW/NOT SURE
  4. VISITING FRIENDS OR RELATIVES -----> Will you:
    1. Sightsee only in the local area in which your friends or relatives live, or
    2. Also sightsee in other areas of Alaska?
  5. SEASONAL/PIPELINE WORKER
4. How many nights do you plan to spend in Alaska on this trip? (Record number below. If none, record "0")
- \_\_\_\_\_ No. of nights (Estimate: \_\_\_ Yes \_\_\_ No)
5. What mode of transportation will you use when you cross the Alaska state line leaving Alaska on this trip? (Circle number)
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  2. AIR to foreign destination
  3. COMMERCIAL CRUISESHIP
  4. ALASKA STATE FERRY
  5. HIGHWAY -----> Will you be taking your vehicle onto a ferry or cruiseship when you leave Alaska?
    1. NO
    2. YES - Circle appropriate number:
      3. Cruiseship or
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  - > Which type of vehicle will you be using?
    1. AUTO
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    3. MOTORCOACH
    4. OTHER \_\_\_\_\_
  6. COMMERCIAL BOAT/FREIGHTER
  7. PRIVATE BOAT
  8. MILITARY BOAT
  9. DONT KNOW/NOT SURE
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  3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE
- "Packaging" - When you have both lodging and transportation and/or sightseeing prearranged and you pay a single price in advance.

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\_\_\_\_\_ NO. IN PARTY

8. What are the ages and sex of these (Number...Answer to Q.7) people? (Record numbers in spaces)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. What is their employment status? (Record numbers in spaces below)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. In the last five years, how many other trips have you made to Alaska for pleasure? for business?

FOR PLEASURE \_\_\_\_\_ # OF TRIPS      FOR BUSINESS \_\_\_\_\_ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE RESPECTFULLY REQUEST YOUR NAME AND ADDRESS. WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOUR RETURN HOME. PLEASE HELP US MAKE THIS RESEARCH PROJECT OF VALUE TO US. THE STATE OF ALASKA THANKS YOU.

NAME: \_\_\_\_\_

FULL STREET ADDRESS: \_\_\_\_\_

CITY/STATE/PROVINCE: \_\_\_\_\_

COUNTRY: \_\_\_\_\_

ZIP CODE: \_\_\_\_\_

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS \_\_\_\_\_

**FOR INTERVIEWER/OFFICE USE ONLY:**

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_      INTERVIEWER #: \_\_\_\_\_

LOCATION: 1 KTN 2 JNU 3 ANC 4 FAI 5 SKG 6 TOK 7 ALCAN

MODE: 01 Domestic Air 02 International Air  
03 Cruise - Walk 04 Cruise - Tour  
05 Ferry - PR 06 Ferry - SEA  
07 Hwy - PV

SAMPLES: DOMESTIC AIR: 01 AS 02 DL 03 UA 04 NW 05 HA 06 Other Dom \_\_\_\_\_

Flight No. \_\_\_\_\_

INTERNATL AIR: 01 AF 02 BA 03 CL 04 DL 05 HA 06 IB 07 JL  
08 KL 09 KE 10 LH 11 SN 12 SK 13 SR 14 Other Int'l \_\_\_\_\_

Flight No. \_\_\_\_\_

CRUISE: 01 Noordam 02 Nieuw Amst 03 Rotterdam 04 Westerdam  
05 Fair Princ 06 Star Princ 07 Pac Princ 08 Sea Princ 09 Is Princ  
10 Daphne 11 Regent Sea 12 Regent Sun 13 Sagafjord 14 Stardancer  
15 Universe 16 R Viking Sea

FERRY: 01 Taku 02 Aurora 03 Malaspina 04 Matanuska 05 Columbia

HWY: 01 Auto 02 Camper/RV 03 Other



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WELCOME HOME FROM ALASKA!

Please help us once again by giving us your opinion about your Alaska visit.

The survey has four parts:

- Traveling to and from Alaska
- Regions of Alaska you visited
- How you planned your Alaska trip
- Basic data on yourself

You are part of a small but important sample of visitors to Alaska. It is very important you complete this survey for the survey results to be truly representative.

ALL RESPONSES REMAIN CONFIDENTIAL

Thank you,

Data Decisions Group, Inc.

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**STATE  
OF  
ALASKA  
SURVEY**

**ATTENTION: BUSINESS TRAVELLER**

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Please answer the three questions below, then starting on the next page, respond to questions in the SURVEY except questions 1, 2, 3, 25 and 26 which have been marked out. Thank you.

---

- A. About how many business trips *by air* have you made in the last 12 months?\_\_\_\_\_
- B. About how many business trips *to Alaska* have you made in the last 12 months?\_\_\_\_\_
- C. Of those business trips to Alaska in the last 12 months, how many included days added beyond the business portion of the trip for pleasure-type activities?\_\_\_\_\_

# STATE OF ALASKA SURVEY

Thank you for participating in our Arrival Survey when you visited Alaska recently. Would you help us now by spending 10 minutes to make Alaska a better place to visit?

THE SURVEY IS VOLUNTARY AND CONFIDENTIAL – PLEASE DO NOT INCLUDE YOUR NAME. YOUR RESPONSES WILL BE USED ONLY FOR STATISTICAL PURPOSES AND WILL HELP US IMPROVE ALASKA'S FACILITIES, SERVICES, ATTRACTIONS AND TRANSPORTATION.

If you have any questions about completing this survey please call collect to the State of Alaska Survey Office (907) 225-5960. Thank you!

## FIRST, LOOKING AT YOUR OVERALL EXPERIENCE

1. In terms of VALUE FOR THE MONEY, how does Alaska COMPARE with other vacation destinations you've visited in the past 5 years?

(Please circle one number for each item which best describes your opinion. For example, if you feel the accommodations in which you stayed in Alaska were better than average, but not the best, in terms of VALUE FOR THE MONEY COMPARED WITH YOUR LAST 5 YEARS' VACATION DESTINATIONS, you would circle either a "5" or "6" across from "Accommodations" depending on how MUCH better than average you felt the accommodations to be. Cruise Passengers: Rate each item as it pertains to both your cruiseship and other parts of your trip, if any. Please complete Question 3 in the same manner.)

	Better					Worse	
<b>Overall</b>	7	6	5	4	3	2	1
Accommodations	7	6	5	4	3	2	1
Transportation	7	6	5	4	3	2	1
To Alaska	7	6	5	4	3	2	1
From Alaska	7	6	5	4	3	2	1
Within Alaska	7	6	5	4	3	2	1
Sightseeing/Attractions	7	6	5	4	3	2	1
Activities	7	6	5	4	3	2	1
Restaurants	7	6	5	4	3	2	1
Friendliness/Helpfulness	7	6	5	4	3	2	1

2. Excluding your recent Alaska trip, which vacation destinations have you visited in the past 5 years?

---



---

3. How well did your trip to Alaska live up to WHAT YOU EXPECTED from an Alaskan vacation?

	Exceeded Expectations					Below Expectations	
<b>Overall</b>	7	6	5	4	3	2	1
Accommodations	7	6	5	4	3	2	1
Transportation	7	6	5	4	3	2	1
To Alaska	7	6	5	4	3	2	1
From Alaska	7	6	5	4	3	2	1
Within Alaska	7	6	5	4	3	2	1
Sightseeing/Attractions	7	6	5	4	3	2	1
Activities	7	6	5	4	3	2	1
Restaurants	7	6	5	4	3	2	1
Friendliness/Helpfulness	7	6	5	4	3	2	1



4. Overall, how would you rate your most recent Alaska trip experience?

Excellent							Poor
7	6	5	4	3	2	1	

5. How likely are you to *recommend* Alaska as a vacation place to your friends, relatives and business associates?

Likely						Unlikely
7	6	5	4	3	2	1

6. How likely are you to visit Alaska again in the next 5 years?

<i>For Vacation?</i>	Likely						Unlikely
	7	6	5	4	3	2	1

<i>For Business?</i>	N/A	Likely					Unlikely	
	X	7	6	5	4	3	2	1

### ABOUT YOUR TRANSPORTATION

7a. What mode of transportation were you using when you crossed the Alaska state line entering Alaska on your recent trip?

- |                                 |                |
|---------------------------------|----------------|
| 1. Air from U.S.A.              | 4. State Ferry |
| 2. Air from foreign destination | 5. Highway     |
| 3. Commercial Cruiseship        | 6. Other       |

7b. What mode of transportation were you using when you crossed the Alaska state line leaving Alaska on your recent trip?

- |                               |                |
|-------------------------------|----------------|
| 1. Air to U.S.A.              | 4. State Ferry |
| 2. Air to foreign destination | 5. Highway     |
| 3. Commercial Cruiseship      | 6. Other       |

8a. **If you entered and/or left Alaska by air**, did anyone in your party use frequent flyer mileage to come to Alaska?

1. Yes
2. No

8b. If yes, what mileage program was used? \_\_\_\_\_

8c. How many in your party used it? 1 2 3 4 5 6 or more

9. **If you left Alaska by highway**, did you take your personal vehicle or a motorcoach onto a state ferry or commercial cruiseship when you left Alaska?

1. Yes
2. No

### NOW, FOR SOME TRIP FACTS

10. How long ago did you *return from* your recent Alaska trip?  
\_\_\_\_\_ days

11. How many *nights* did you spend in Alaska and/or in Alaskan waters on your recent trip? (Do not count nights spent in Canada and Canadian waters.)

\_\_\_\_\_ nights (If none, please write in "0").

12. Please check each region and each place visited on your recent trip. (Circle appropriate numbers. Cruise passengers: check all places visited, including your ship's ports of call.)

1. SOUTHEAST

- Ketchikan
- Sitka
- Juneau
- Haines
- Skagway
- Glacier Bay
- Wrangell
- Petersburg
- Other (please specify) \_\_\_\_\_

2. SOUTHCENTRAL

- Anchorage
- Homer
- Kenai/Soldotna
- Seward
- Other Kenai Peninsula Communities
- Wasilla
- Palmer
- Valdez/Prince William Sound
- Whittier
- Cordova
- Glenallen
- Other (please specify) \_\_\_\_\_

3. INTERIOR/NORTHERN

- Fairbanks
- Kotzebue
- Nome
- Barrow
- Prudhoe Bay
- Tok
- Other (please specify) \_\_\_\_\_

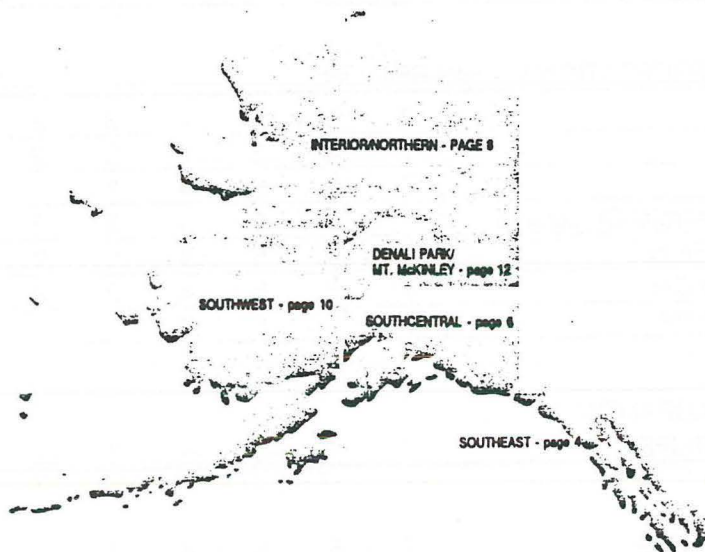
4. SOUTHWEST

- Bethel
- Dillingham
- Kodiak
- Katmai
- King Salmon
- Iliamna
- Aleutians
- Pribilofs
- Other (please specify) \_\_\_\_\_

5. DENALI PARK/  
MT. MCKINLEY

13b. Which type of travel best describes your recent Alaska trip? (Circle number)

- |                                      |                                                                      |
|--------------------------------------|----------------------------------------------------------------------|
| 1. Packaged air/cruise combination   | 6. Other packaged trip _____                                         |
| 2. Packaged air/ferry combination    | 7. Round-trip ferry                                                  |
| 3. Packaged air/lodging combination  | 8. No packaged trip, but purchased sightseeing trips while in Alaska |
| 4. Packaged cruise/drive combination | 9. Completely on own                                                 |
| 5. Round trip cruise package         |                                                                      |



PLEASE COMPLETE THE QUESTIONS ON EACH OF THE INDICATED PAGES FOR REGIONS YOU VISITED. COMPLETE ONLY THE PAGES FOR THOSE REGIONS YOU VISITED ON YOUR RECENT ALASKA TRIP.

# SOUTHEAST REGION



COMPLETE THIS SECTION ONLY IF YOU VISITED **SOUTHEAST** ALASKA ON YOUR RECENT ALASKA TRIP.

14. In the SOUTHEAST Region, how many **nights did you stay** in each of the following places and in what type of **lodging**?

	Indicate No. of Nights in each Lodging Type							
	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Camp	Cruise	Ferry
AT SEA								
Ketchikan								
Wrangell								
Petersburg								
Sitka								
Juneau								
Haines								
Skagway								
Glacier Bay								
Other _____								

\* Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN **SOUTHEAST** ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X," IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

15. LODGING:	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Campground	7	6	5	4	3	2	1	X	
Commercial Cruiseship	7	6	5	4	3	2	1	X	
State Ferry	7	6	5	4	3	2	1	X	

16. TRANSPORTATION WITHIN REGION:								
Bus	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X
Air	7	6	5	4	3	2	1	X
Commercial Cruiseship	7	6	5	4	3	2	1	X
State Ferry	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X

17. RESTAURANTS/ NIGHTLIFE:								
	7	6	5	4	3	2	1	X

18. SHOPPING:								
	7	6	5	4	3	2	1	X

19. VISITOR INFORMATION CENTERS:								
	7	6	5	4	3	2	1	X

20. SIGHTSEEING:

Flightseeing	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
City Tours	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

21. CULTURAL ATTRACTIONS/  
MUSEUMS

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. ACTIVITIES:

Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Fishing Overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Birdwatching	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Cross Country skiing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Dogsledding	7	6	5	4	3	2	1	X

23. Please check each of the following attractions you visited in SOUTHEAST Alaska.

- Glacier Bay
- Inside Passage
- Mendenhall Glacier
- Alaska State Museum
- Eaglecrest Ski Area
- Misty Fjords National Monument
- Tracy Arm
- Skagway's Historic Gold Rush District
- Sitka's Russian church and dancers
- Sitka National Historical Park (including totems & exhibit center)
- Ketchikan area totems
- Chilkat Bald Eagle Preserve at Haines

# SOUTHCENTRAL REGION

COMPLETE THIS SECTION ONLY IF YOU VISITED **SOUTHCENTRAL** ALASKA ON YOUR RECENT ALASKA TRIP.



14. In the SOUTHCENTRAL Region, how many **nights did you stay** in each of the following places and in what type of **lodging**?

**Indicate No. of Nights in each Lodging Type**

TOTAL NIGHTS	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home*	RV/ Camp	Cruise	Ferry
AT SEA							
Anchorage							
Homer							
Kenai/Soldotna							
Seward							
Other Kenai Pen. Communities							
Wasilla							
Palmer							
Valdez							
Cordova							
Other _____							

\* Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN **SOUTHCENTRAL** ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X," IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

15. **LODGING:**

	Excellent						Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X
Resort/Lodge	7	6	5	4	3	2	1	X
Bed & Breakfast	7	6	5	4	3	2	1	X
RV/Campground	7	6	5	4	3	2	1	X
Commercial Cruiseship	7	6	5	4	3	2	1	X
State Ferry	7	6	5	4	3	2	1	X

16. **TRANSPORTATION WITHIN REGION:**

Bus	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X
Air	7	6	5	4	3	2	1	X
Commercial Cruiseship	7	6	5	4	3	2	1	X
State Ferry	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X

17. **RESTAURANTS/  
NIGHTLIFE:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

18. **SHOPPING:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

19. **VISITOR INFORMATION  
CENTERS:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SIGHTSEEING:

Flightseeing	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
City Tours	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

21. CULTURAL ATTRACTIONS/  
MUSEUMS

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. ACTIVITIES:

Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Fishing Overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Birdwatching	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Cross Country skiing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Dogsledding	7	6	5	4	3	2	1	X

23. Please check each of the following attractions you visited in SOUTHCENTRAL Alaska.

Anchorage area:

- Portage Glacier
- Crow Creek Mine
- Alyeska Ski Resort
- Chugach State Park
- St. Nicholas, Russian Orthodox Church and Native Spirit Houses (Eklutna)
- Anchorage Museum of History and Art
- Lake Hood Air Harbor
- Potter Point State Game Refuge

Matanuska-Susitna area:

- Independence Mine State Historic Park
- Hatcher Pass Recreation Area
- Alaska Historical and Transportation Museum
- Matanuska Glacier

Prince William Sound:

- Columbia Glacier
- Prince William Sound
- Valdez Pipeline Terminal
- College Fjord

Kenai Peninsula:

- Resurrection Bay
- Kachemak Bay
- Kenai Fjord National Monument
- Kenai National Wildlife Refuge
- Kenai River

WHEN YOU COMPLETE THE QUESTIONS FOR ALL THE REGIONS YOU VISITED, PLEASE PROCEED TO PAGE 13 AND FINISH THE SURVEY. THANK YOU.

# INTERIOR/ NORTHERN REGION



COMPLETE THIS SECTION ONLY IF YOU VISITED **INTERIOR/NORTHERN** ALASKA ON YOUR RECENT ALASKA TRIP.

14. In the INTERIOR/NORTHERN Region, how many **nights did you stay** in each of the following places and in what type of **lodging**?

**Indicate No. of Nights in each Lodging Type**

	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Camp
Fairbanks	_____	_____	_____	_____	_____	_____
Tok	_____	_____	_____	_____	_____	_____
Kotzebue	_____	_____	_____	_____	_____	_____
Nome	_____	_____	_____	_____	_____	_____
Barrow	_____	_____	_____	_____	_____	_____
Prudhoe Bay	_____	_____	_____	_____	_____	_____
Other _____	_____	_____	_____	_____	_____	_____

\* Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN **INTERIOR/NORTHERN** ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X," IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

15. **LODGING:**

	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Campground	7	6	5	4	3	2	1	X	

16. **TRANSPORTATION WITHIN REGION:**

Bus	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X
Air	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X

17. **RESTAURANTS/  
NIGHTLIFE:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

18. **SHOPPING:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

19. **VISITOR INFORMATION  
CENTERS:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SIGHTSEEING:

Flightseeing	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
City Tours	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

21. CULTURAL ATTRACTIONS/  
MUSEUMS

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. ACTIVITIES:

Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Fishing Overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Birdwatching	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Cross Country skiing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Dogsledding	7	6	5	4	3	2	1	X

23. Please check each of the following attractions you visited in INTERIOR/  
NORTHERN Alaska.

Fairbanks area:

- University of Alaska
  - University of Alaska Museum
  - Large Animal Research Station (Musk Ox farm)
  - Agricultural and Forestry Experiment Station farm
  - Geophysical Institute
- AlaskaLand
- Gold panning, dredges and saloons
- Chena River trips
- Hot Springs
- TransAlaska Pipeline
- Dog Mushing Attractions

Other Northern areas:

- Nome-Gold Rush History, Eskimo culture, etc.
- Kotzebue-Eskimo culture
- Farthest north point in North America (Barrow)
- Prudhoe Bay oil fields
- Gates of the Arctic National Park
- Arctic National Wildlife Refuge
- Brooks Range
- Pipeline Haul Road



# SOUTHWEST REGION



COMPLETE THIS SECTION ONLY IF YOU VISITED **SOUTHWEST** ALASKA ON YOUR RECENT ALASKA TRIP.

14. In the SOUTHWEST Region, how many **nights did you stay** in each of the following places and in what type of **lodging**?

	Indicate No. of Nights in each Lodging Type							
	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Camp	Cruise	Ferry
AT SEA								
Bethel								
Dillingham								
Kodiak								
Katmai								
King Salmon								
Iliamna								
Aleutians								
Pribilofs								
Lodges:								
Alaska Peninsula								
Bristol Bay Area								
Lake Clark/								
Lake Iliamna Area								
Kodiak Area								
Other								

\* Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN **SOUTHWEST** ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X," IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

15. LODGING:	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Campground	7	6	5	4	3	2	1	X	
Commercial Cruiseship	7	6	5	4	3	2	1	X	
State Ferry	7	6	5	4	3	2	1	X	

16. TRANSPORTATION WITHIN REGION:	Excellent							Poor	Didn't Use
Bus	7	6	5	4	3	2	1	X	
Air	7	6	5	4	3	2	1	X	
Commercial Cruiseship	7	6	5	4	3	2	1	X	
State Ferry	7	6	5	4	3	2	1	X	
Rental Car	7	6	5	4	3	2	1	X	
Rental RV	7	6	5	4	3	2	1	X	

17. RESTAURANTS/ NIGHTLIFE:	Excellent							Poor	Didn't Use
	7	6	5	4	3	2	1	X	

18. SHOPPING:	Excellent							Poor	Didn't Use
	7	6	5	4	3	2	1	X	

19. VISITOR INFORMATION CENTERS:	Excellent							Poor	Didn't Use
	7	6	5	4	3	2	1	X	

20. SIGHTSEEING:

Flightseeing	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
City Tours	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

21. CULTURAL ATTRACTIONS/  
MUSEUMS

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. ACTIVITIES:

Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Fishing Overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Birdwatching	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Cross Country skiing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Dogsledding	7	6	5	4	3	2	1	X

23. Please check each of the following attractions you visited in SOUTHWEST Alaska.

- Katmai National Park
- Baranof Museum (Kodiak)
- Kodiak National Wildlife Refuge
- Ft. Abercrombie (Kodiak)
- Russian Orthodox Church (Kodiak)
- Pribilof Islands
- Wood River-Tikchik State Park
- Aleutian Islands
- Round Island
- Lake Clark National Park

# DENALI PARK/ MT. MCKINLEY REGION

COMPLETE THIS SECTION ONLY IF YOU VISITED **DENALI PARK/  
MT. MCKINLEY** ALASKA ON YOUR RECENT ALASKA TRIP.

14. How many **nights did you stay** in each of the following places and in what type of **lodging** in the DENALI PARK/MT. MCKINLEY Region?

**Indicate No. of Nights in each Lodging Type**

TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Camp

\* Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN **DENALI PARK/MT. MCKINLEY** ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X," IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

15. **LODGING:**

	Excellent	7	6	5	4	3	2	1	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Campground	7	6	5	4	3	2	1	X	

16. **TRANSPORTATION WITHIN REGION:**

Bus	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X
Air	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X

17. **RESTAURANTS/  
NIGHTLIFE:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

18. **SHOPPING:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

19. **VISITOR INFORMATION  
CENTERS:**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. **SIGHTSEEING:**

Flightseeing	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
City Tours	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

21. **CULTURAL ATTRACTIONS/  
MUSEUMS**

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. ACTIVITIES:

Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Fishing Overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Birdwatching	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Cross Country skiing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Dogsledding	7	6	5	4	3	2	1	X

**THINK BACK FOR A MOMENT TO WHEN YOU WERE PLANNING YOUR RECENT ALASKA TRIP**

24. Please tell us what prompted you to actually decide to visit Alaska **this** year?

\_\_\_\_\_

\_\_\_\_\_

This visit decided by employer/gov't/military (please skip to Question 36).

25. What other destination(s), if any, did you *consider for this vacation year* before deciding on Alaska?

1. None      2. The following: \_\_\_\_\_

26. Why did you choose Alaska for this trip rather than that (those) destination(s)?

\_\_\_\_\_

\_\_\_\_\_

27. How long before the trip did you decide what season and year you would make this recent trip?

\_\_\_\_\_ years \_\_\_\_\_ months before the trip

28. How long before the trip did you make your travel arrangements?

\_\_\_\_\_ years \_\_\_\_\_ months before the trip

29a. Where did you get information to help plan your recent Alaska trip BEFORE departure?

\_\_\_\_\_

\_\_\_\_\_

29b. How, if at all, did a *travel agent* help you for this Alaska trip?  
(Circle all that apply).

1. Provided brochures
2. Recommended or suggested you visit Alaska
3. Recommended or suggested a particular travel company to use
4. Recommended or suggested lodging
5. Recommended or suggested a form of transportation/type of trip i.e. air, cruise
6. Recommended or suggested specific places of interest, sights or cities to visit
7. Booked a tour or cruise package for you
8. Booked independent lodging, transportation i.e. flights, or activities/attractions for you
9. Other
10. Didn't use travel agent at all

30. Did you send for the State of Alaska Official Vacation Planner?

1. Yes
2. No

31. Prior to leaving home, did you or anyone in your party *purchase* any books, maps or other materials for trip planning purposes?

1. Yes
2. No

32a. Did you receive any unsolicited brochures?

1. Yes
2. No

32b. If yes, about how many? \_\_\_\_\_

33. Have you read any special newspaper travel sections on Alaska?

1. Yes
2. No

34. What was the biggest misconception you had about Alaska that was cleared up by your visit? \_\_\_\_\_  
\_\_\_\_\_

35a. Did the March 24, 1989 *Exxon Valdez* oil spill of 11 million gallons in Prince William Sound affect your Alaska trip planning in any way?

1. Yes
2. No

35b. If yes, how? \_\_\_\_\_

36. How many total nights did you spend in each type of lodging **in Alaska** on your recent Alaska trip?

- |                       |                     |
|-----------------------|---------------------|
| _____ Hotel/Motel     | _____ RV/Campground |
| _____ Resort/Lodge    | _____ Cruiseship    |
| _____ Bed & Breakfast | _____ Ferry         |
| _____ Private Home*   | _____ Other         |

\*Private homes which are not bed and breakfasts.

## YOUR TRAVEL PATTERNS

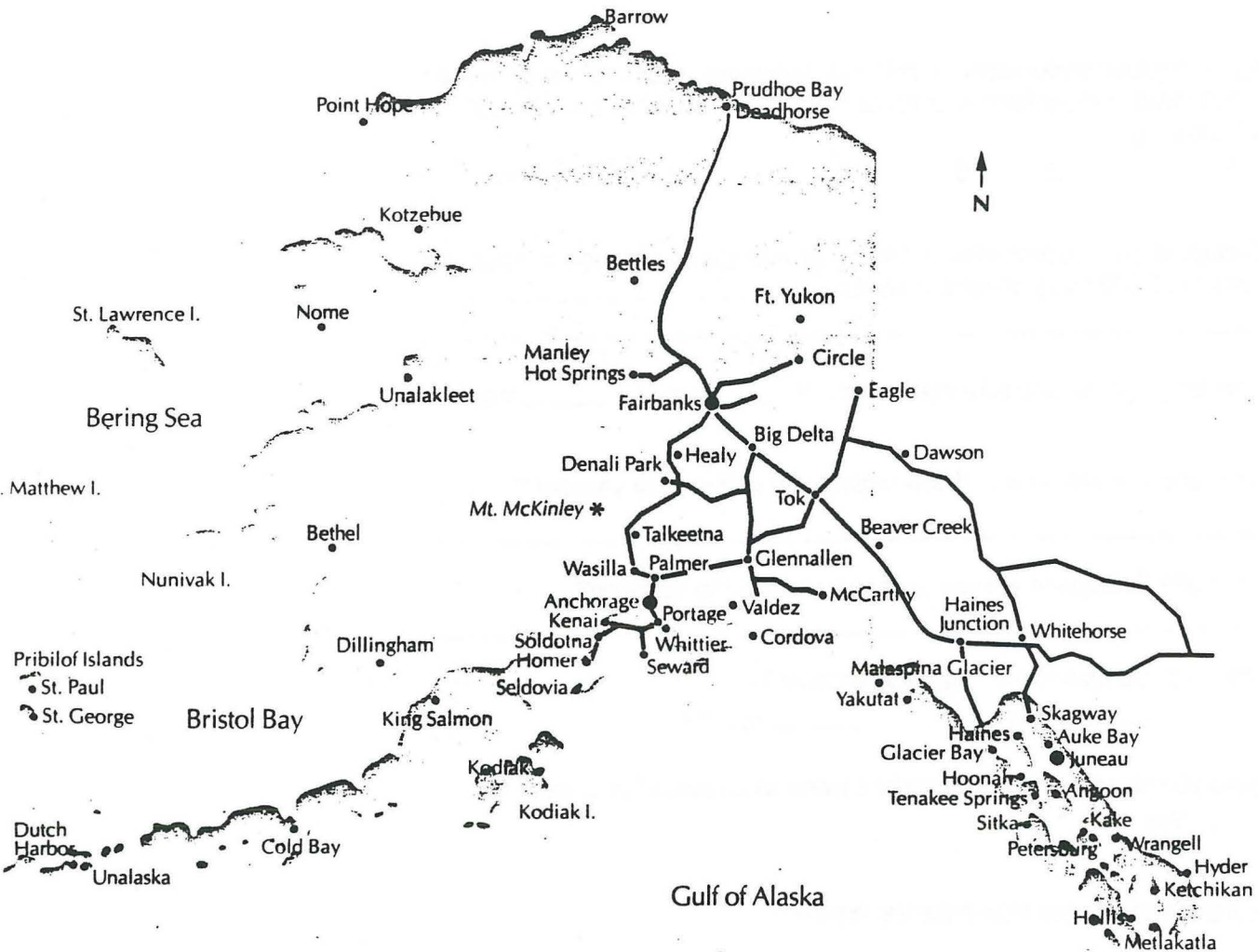
37. Excluding your recent Alaska trip, how many vacations outside the continental U.S. have you taken in the last 5 years? (Circle one)  
0    1    2    3    4    5    6 or more
38. Again, excluding your recent Alaska trip, how many vacations to destinations 2,000 miles or more from your home have you taken in the last 5 years? (Circle one)  
0    1    2    3    4    5    6 or more
39. Excluding your recent Alaska trip, what was the destination of your last vacation 2,000 miles or more from home? \_\_\_\_\_  
\_\_\_\_\_
40. How long ago did you take that vacation? \_\_\_\_\_ years    \_\_\_\_\_ months
41. What one destination would you *most like to visit next* for vacation?  
\_\_\_\_\_
- 42a. What one destination will you *probably visit next* for vacation?  
\_\_\_\_\_
- 42b. When do you plan to take that next vacation?  
\_\_\_\_\_ years    \_\_\_\_\_ months
43. Have you recommended Alaska to anyone as a result of your visit?  
1. Yes    2. No

## FOR CLASSIFICATION PURPOSES ONLY

44. Please circle the highest level of formal education you had the opportunity to complete:
1. Grade 11 or less
  2. Graduated from high school
  3. 1-3 years of college
  4. Graduated from college
  5. Attended or completed graduate school
45. Your total household income, before taxes, including pensions, dividends and interest, social security, annuities and investment earnings of all types:
- |                      |                       |
|----------------------|-----------------------|
| 1. Under \$25,000    | 4. \$50,000-\$74,999  |
| 2. \$25,000-\$34,999 | 5. \$75,000-\$99,999  |
| 3. \$35,000-\$49,999 | 6. \$100,000 and over |

Please continue to page 16. Thank you.

46. Will you please show us your route through Alaska on your recent trip using this map. Draw a line connecting the places you visited in the order in which you visited them. Please mark a START point with the word "START" and a FINISH point with the word "FINISH". Be sure to use a contrasting color pen or pencil for legibility.



OPTIONAL:

47. To summarize, please list your itinerary and transportation between places for your recent trip:

From	To	By...						
		Air	Cruise	Ferry	Auto	Bus	Train	Other
Hometown	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU for your cooperation. You have very generously helped to improve the State of Alaska for future visitors. We sincerely hope you will visit the 49th State again soon.