

AVSP 7 – Summer 2016

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

Summary Profiles: U.S. Regions and Canada

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**TABLE 10.4 - Length of Stay, Destinations and Lodging Type
US Regions & Canada (%)**

	All Visitors	Western US	Midwest US	Southern US	Eastern US	Canada
Average length of stay in Alaska	9.2	9.0	9.4	9.4	9.6	7.1
Regions Visited						
Southeast	67	57	65	71	71	90
Southcentral	52	52	57	53	56	22
Interior	29	23	36	32	36	15
Southwest	4	6	5	2	4	2
Far North	2	2	2	1	1	1
Destinations Visited, Top 10						
Juneau	61	50	61	68	68	75
Ketchikan	58	48	59	65	64	75
Skagway	48	35	54	56	55	63
Anchorage	47	48	53	47	51	19
Glacier Bay Nat'l Park	29	26	24	28	25	39
Denali Nat'l Park	23	16	31	26	32	8
Seward	23	17	31	26	33	11
Fairbanks	17	13	19	18	19	7
Hoonah/Icy Strait Point	13	10	11	14	17	23
Talkeetna	11	9	16	13	16	2
Lodging Types Used						
Cruise	57	44	59	65	65	74
Hotel/motel	37	35	41	38	44	15
VFR	15	21	15	12	11	3
Lodge	15	12	19	17	18	6
Campground/RV	6	5	6	5	6	7
B&B	4	5	4	3	5	2
Vacation rental	3	4	5	3	2	1
Wilderness camping	2	2	3	1	2	2
State ferry	1	1	<1	<1	<1	1

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

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

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

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

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

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

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

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

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

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

**TABLE 10.10 - Demographics
US Regions & Canada (%)**

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

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

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