AVSP 7 – Summer 2016

Section 15: Summary Profiles – Adventure, Culture, and Fishing Markets

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Summary Profiles: Adventure, Culture, and Fishing Markets

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

TABLE 15.1 - Market Definition and Sample Size
Selected Visitor Markets

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

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

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

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

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

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

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

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

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

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

- Roughly half of guided fishermen purchased a multi-day fishing lodge package.

- For both markets, visitors were most likely to visit Southcentral (around 70 percent). Guided fishing visitors were comparatively more likely to visit Southeast Alaska, with 45 percent doing so compared to only 30 percent of unguided fishermen.

- Fishing markets were more likely to include repeat Alaska visitors. Half of guided and three-quarters of unguided fishing parties had previously been to the state.

- While the average repeat visitor had been to Alaska 4.1 times, those in the guided fishing market had been an average of 5.2 times and those in the unguided fishing market had been an impressive 7.7 times previously.

- Both fishing markets were roughly two thirds male and younger than the average Alaska visitor. Both these trends were slightly more pronounced in the unguided fishing market.

- Average household income was much higher for the guided fishing market ($132,000) than the unguided fishing market ($107,000).

- Guided fishing participants spent an average of $2,464 per person in Alaska, while unguided fishing participants spent an average of $1,554.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

*Sample size insufficient for analysis.