

AVSP 7 – Summer 2016

Section 2: Introduction

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

Visitor Volume

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

Visitor Survey

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

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

Project Team

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

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

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

Comparison with AVSP 5 and 6

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

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

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

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

Report Organization

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

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

How to Read the Tables in this Report

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

Acknowledgements

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

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

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