

AVSP 7 – Summer 2016

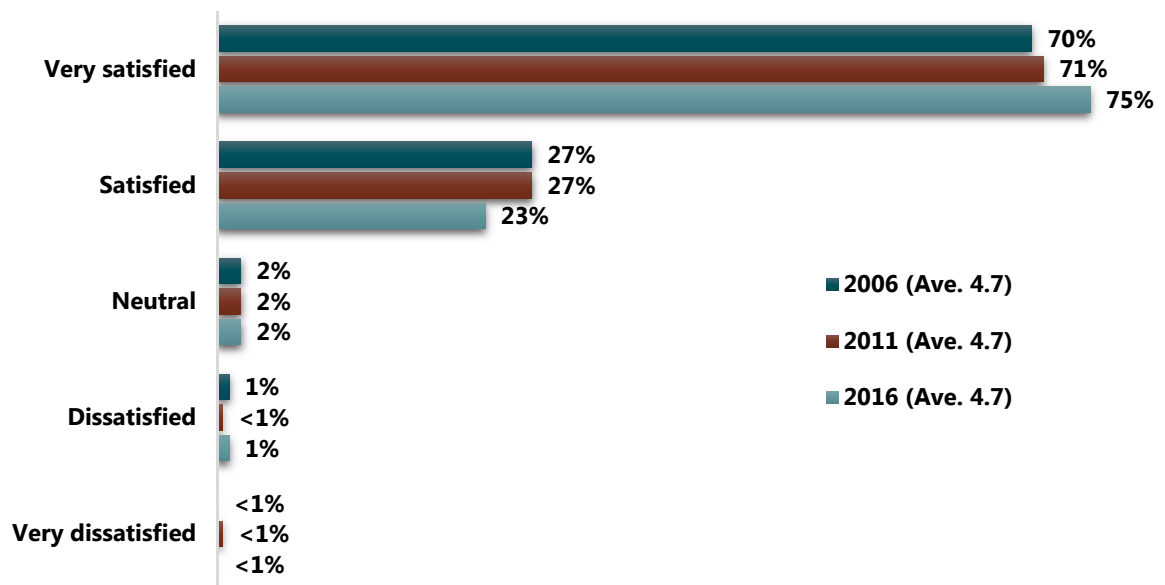
**Section 6:
Visitor Profile -
Satisfaction, Repeat Travel,
and Trip Planning**

Satisfaction with Overall Experience

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

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

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



Transportation Market

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

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

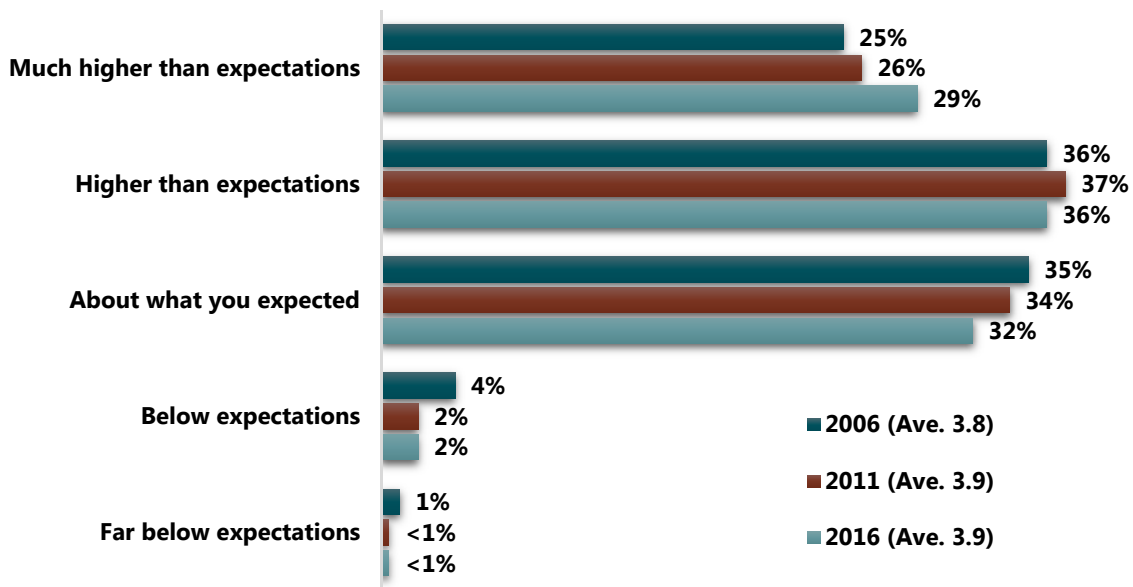
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
5 - Very satisfied	68	70	73	72	72	76	64	64	67
4 - Satisfied	30	28	25	25	25	21	31	34	29
3 - Neither/neutral	2	2	2	1	2	2	4	1	3
2 - Dissatisfied	1	<1	1	2	1	<1	<1	1	1
1 - Very dissatisfied	<1	<1	<1	<1	-	-	-	-	<1
Average 1-5	4.6	4.7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

Compared to Expectations

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

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

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



Transportation Market

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

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

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

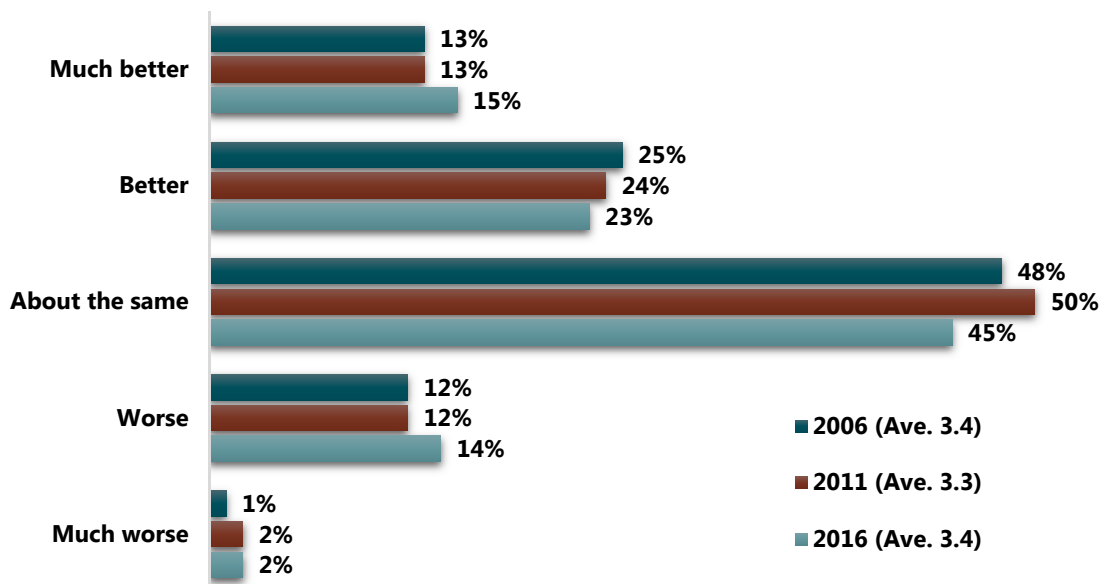
Note: Business visitors were screened out of this question.

Value for the Money

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

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

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



Transportation Market

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

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

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

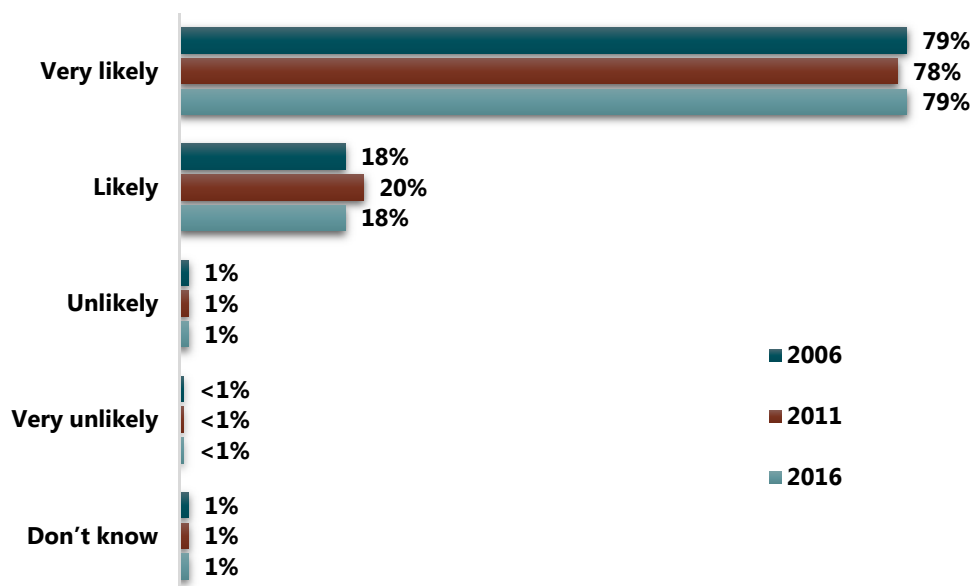
Note: Business visitors were screened out of this question.

Recommending Alaska

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

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

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



Transportation Market

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

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

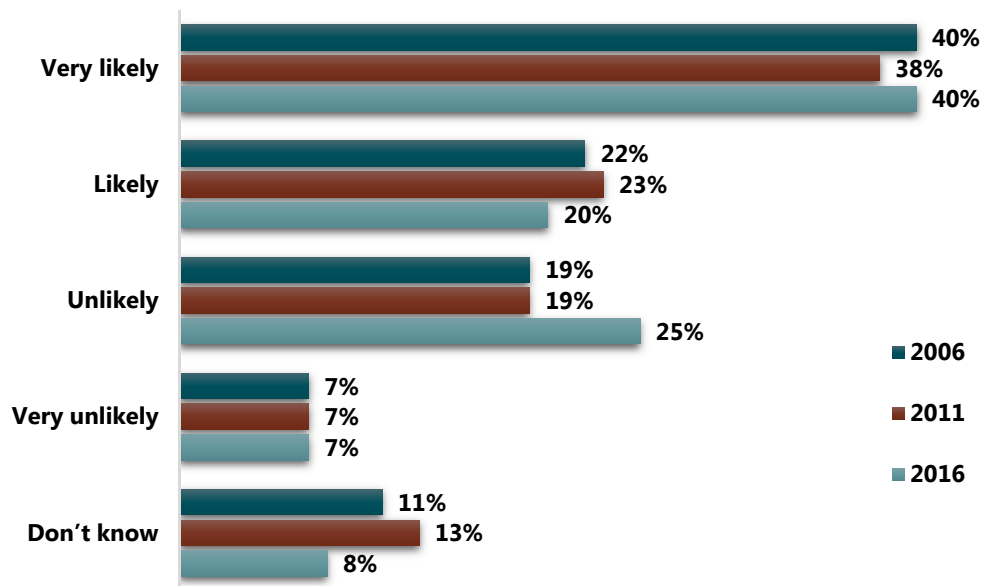
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Very likely	77	74	79	80	80	80	77	80	75
Likely	20	23	18	17	19	17	20	18	19
Unlikely	1	1	1	1	1	1	1	1	2
Very unlikely	<1	<1	<1	1	<1	<1	<1	1	<1
Don't know	2	1	1	1	1	1	3	1	2

Returning to Alaska

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

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

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



Transportation Market

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

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

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

Future Activities/Interests

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

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

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

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

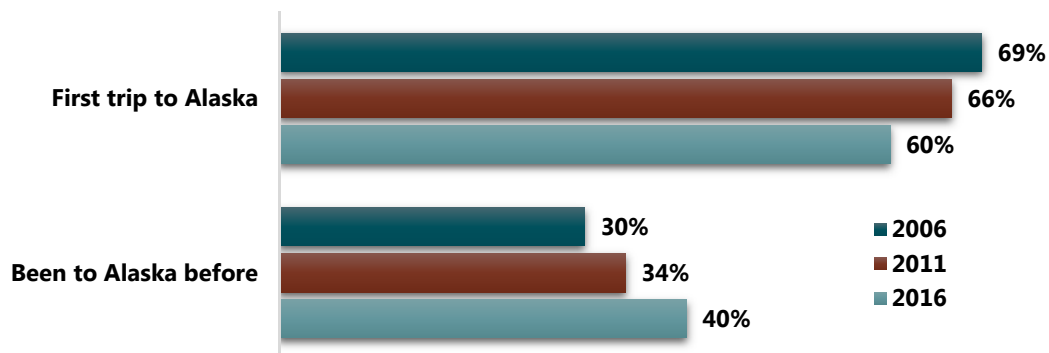
Note: New question in 2016.

Repeat Alaska Travel

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

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

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



Transportation Market

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

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

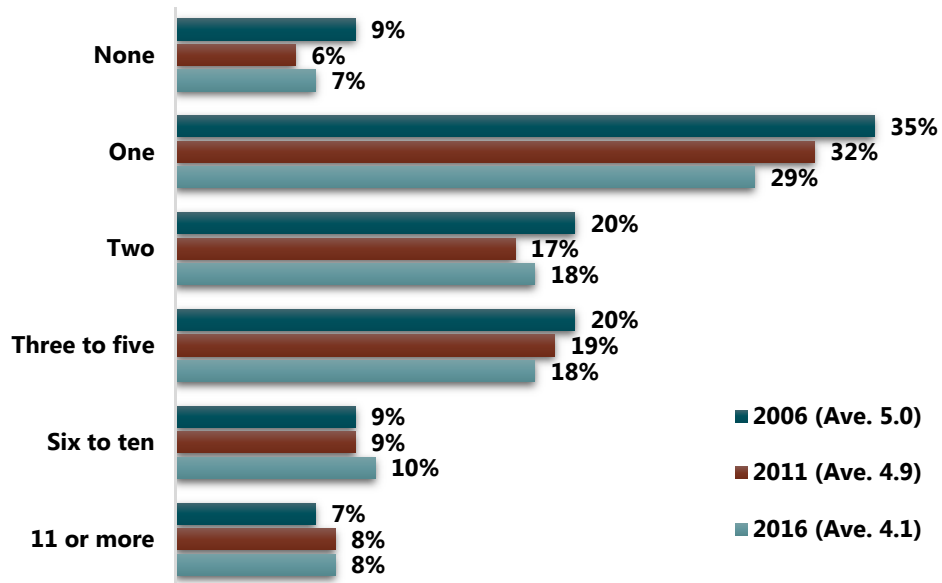
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
First trip to Alaska	41	41	42	81	76	74	50	38	44
Been to Alaska before	59	59	58	19	24	26	50	62	56

Frequency of Alaska Travel

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

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

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



Transportation Market

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

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

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

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

Previous Alaska Cruising

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

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

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

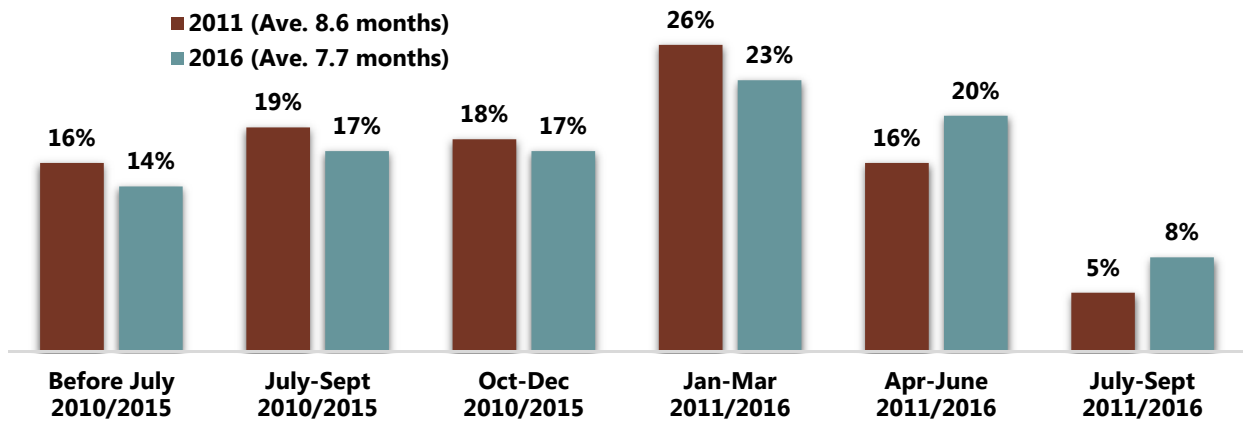
	ALL VISITORS 2016	AIR 2016	CRUISE 2016	HWY/FERRY 2016
Base: Repeat Visitors				
Yes	41	20	75	25
No	59	80	25	75
Base: All Visitors				
Yes	16	12	20	14
No	84	88	80	86

Trip Planning Timeline

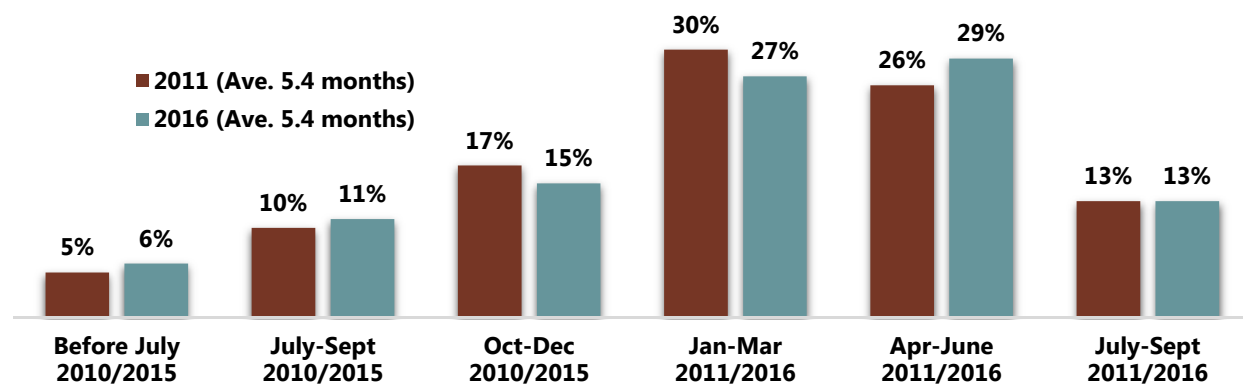
Visitors were asked two questions about their trip planning timeline: how many months ahead of time they decided to come to Alaska, and how many months ahead of time they booked their major travel arrangements. The following charts show trip decision and booking timelines based on the calendar year.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

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

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



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



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

Transportation Market

- Cruise passengers planned the furthest in advance, including for both trip decision (8.8 months) and trip booking (6.6 months). This compares with 7.9 and 3.3 months among highway/ferry visitors, respectively, and 5.9 and 3.7 months among air visitors.
- Air visitors' average timeline for trip decision decreased between 2011 and 2016, from 6.7 to 5.9 months. However, their trip booking timeline increased from 3.5 to 3.7 months.
- Cruise visitors' average timeline for trip decision decreased between 2011 and 2016, from 9.4 to 8.8 months, while their trip booking timeline was consistent at 6.6 months.
- Highway/ferry visitors' average timeline for trip decision dropped from 12.7 to 9.5 months; their trip booking timeline dropped from 3.6 to 3.3 months.

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

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

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

Supplemental Analysis: Trip Planning Timeline

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

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

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

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

Internet Usage

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

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

The 2016 question was changed to:

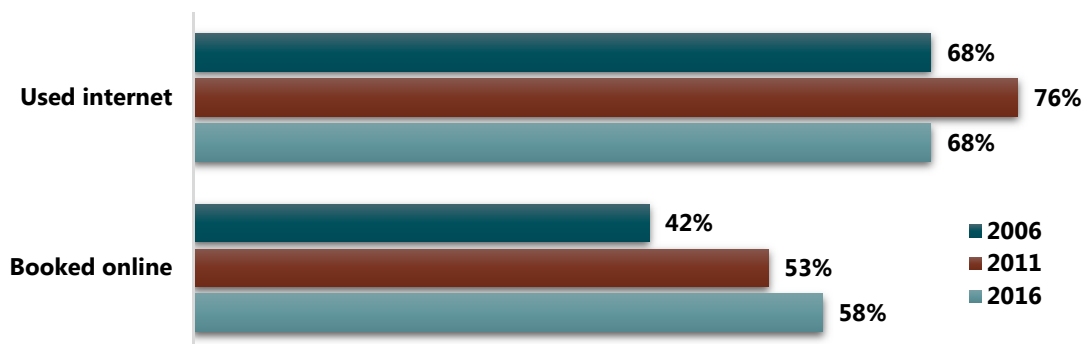
Did you use the internet, including any apps, to plan or book any portion of your Alaska trip?

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

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

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

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



Note: The wording of the question changed in 2016.

Transportation Market

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

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

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

Note: The wording of the question changed in 2016.

Specific Websites and Apps

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

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

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

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

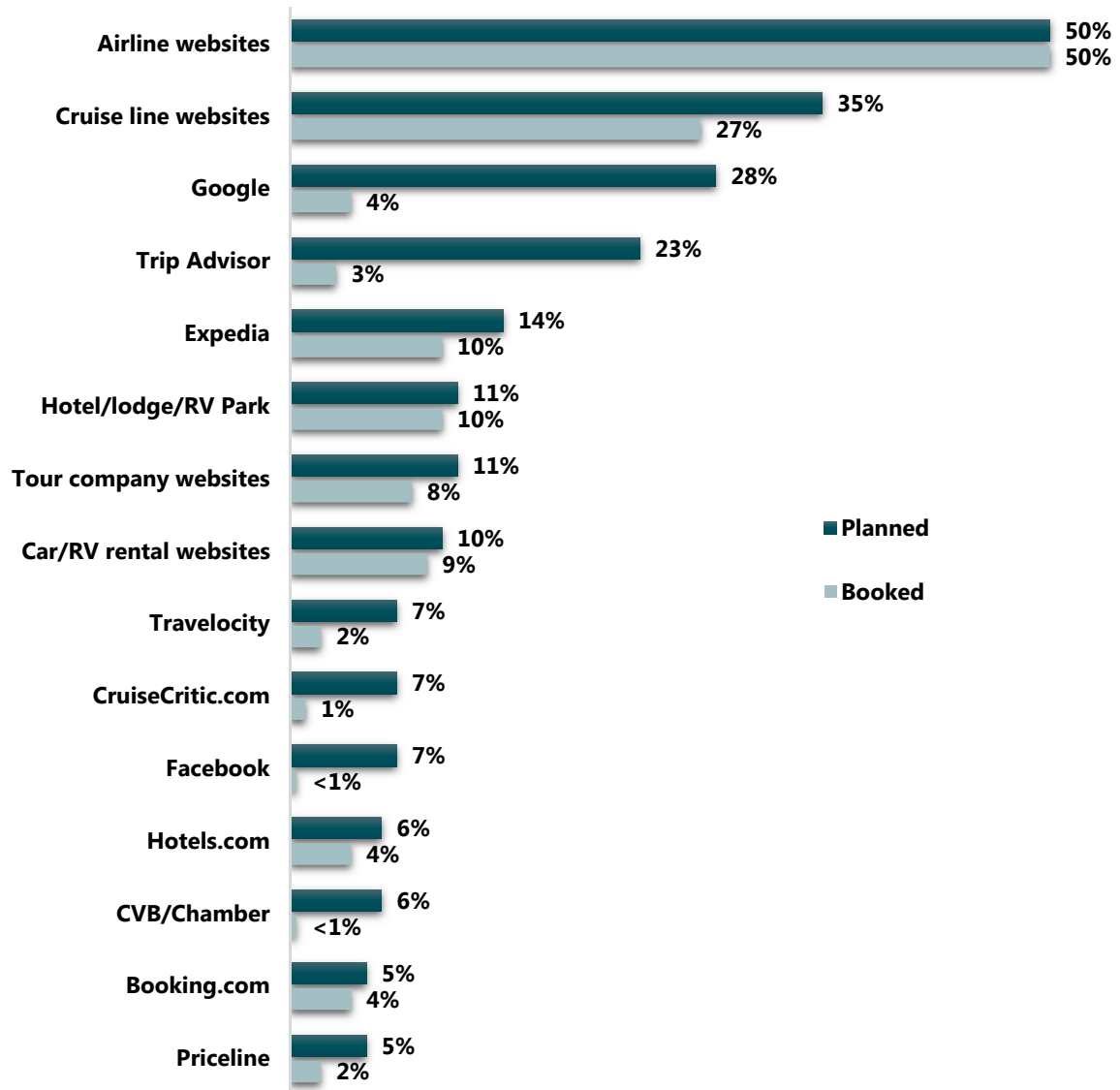
The chart on the next page shows the top 15 responses based on planning sources. A full list in table format is provided on the following page, along with responses by transportation market.

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

Transportation Market

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

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



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

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

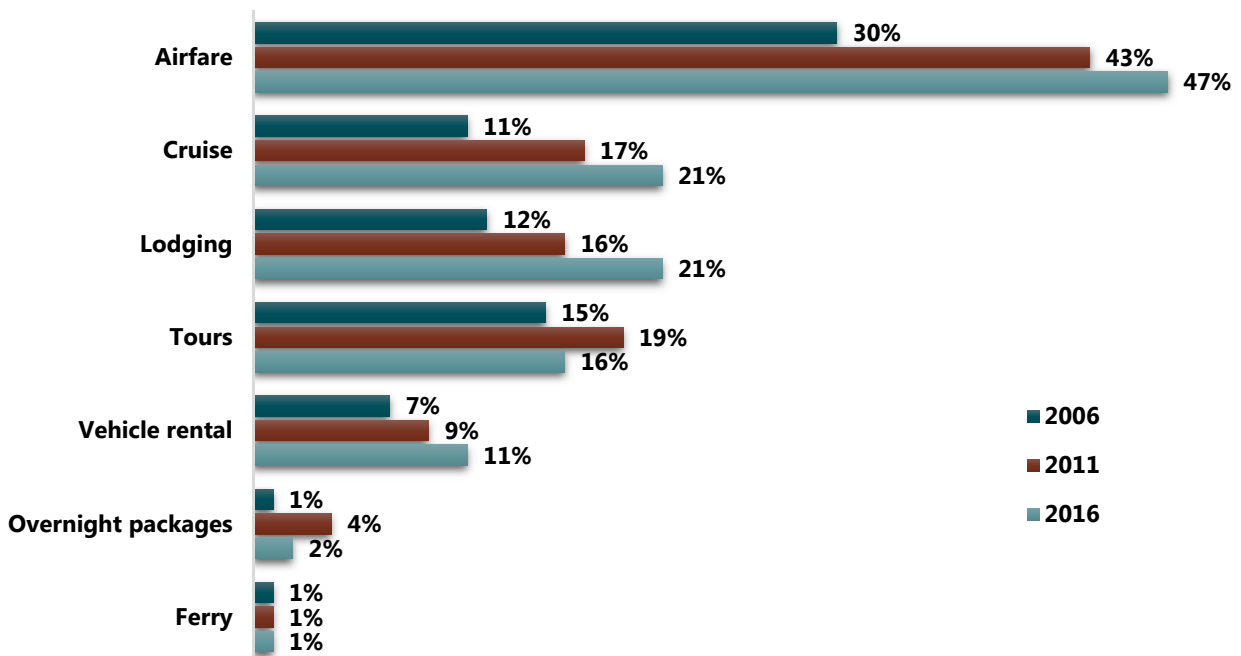
Note: New question in 2016.

Trip Components Booked Online

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

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

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



Transportation Market

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

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

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

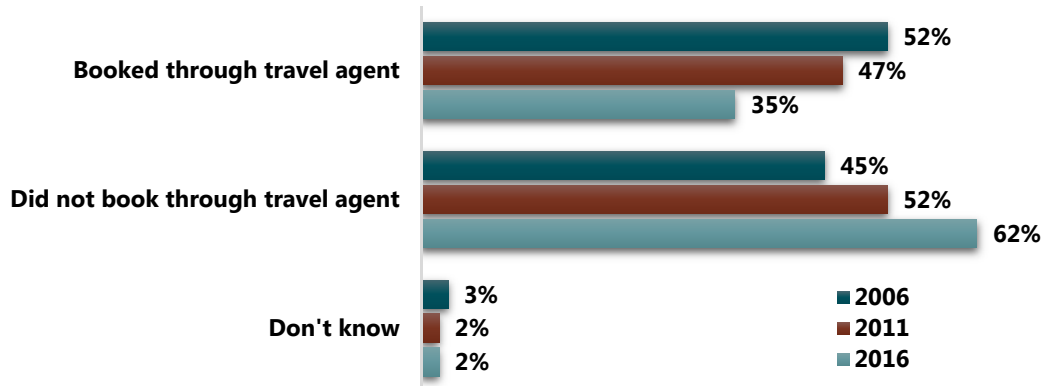
Note: Some highway/ferry visitors enter or exit the state via air, and others travel by air within the state.

Travel Agent Usage

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

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

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



Transportation Market

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

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

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

Trip Components Booked Through a Travel Agent

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

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

Transportation Market

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

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

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

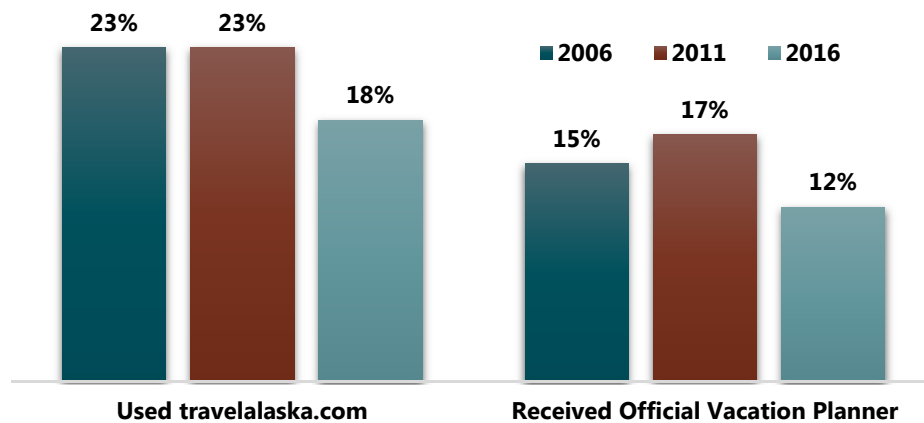
Note: This question was not asked in the 2006 survey.

Usage of State of Alaska Information Sources

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

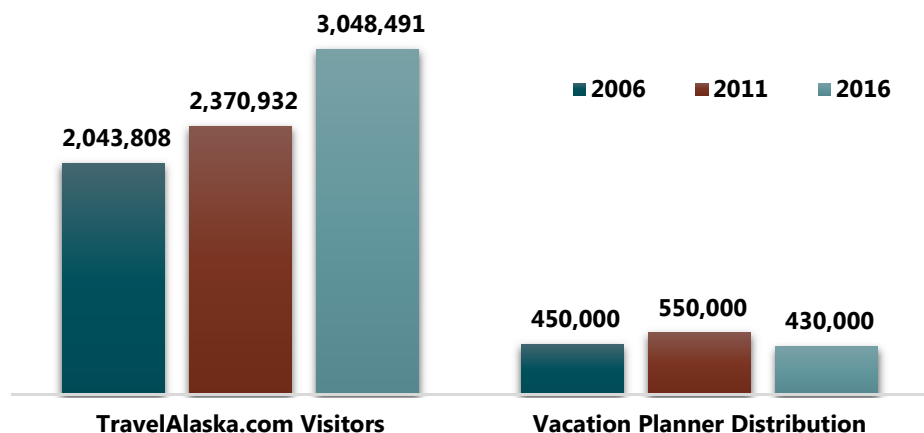
- One out of five visitors (18 percent) recalled using travelalaska.com, while 12 percent said they had received the Official Vacation Planner.
- Usage rates dropped for both sources between 2011 and 2016: from 23 to 18 percent for the website, and from 17 to 12 percent for the Planner. Changes differed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

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



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

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



Source: Alaska Travel Industry Association.

Transportation Market

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

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

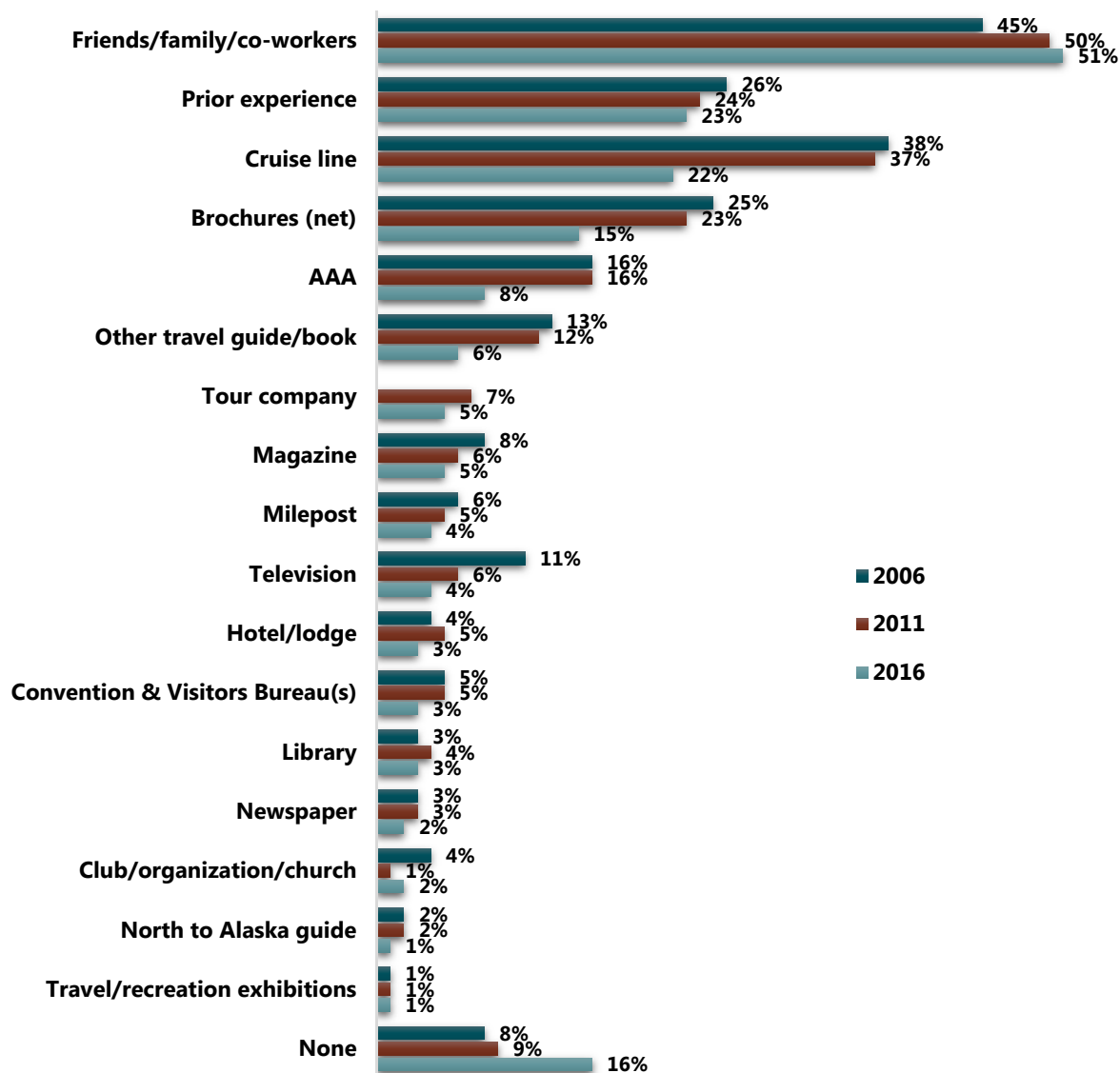
	AIR			CRUISE			HWY/FERRY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Did you visit the official State of Alaska travel website? (www.travelalaska.com) (Intercept Only)									
Yes	21	21	20	23	23	17	30	31	22
No	74	75	75	65	70	78	61	67	72
Don't know	4	5	5	10	7	5	7	3	5
Did you receive the Official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

Usage of Additional Information Sources

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

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

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



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

Transportation Market

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

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

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

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