

AVSP 7 – Summer 2016

Section 9:
Summary Profiles -
Fly/Drive, Highway, Ferry,
and Campground Users

Summary Profile: Highway, Ferry, and Campground Users

This chapter profiles the highway, ferry, and campground user markets. Definitions and sample sizes are provided in the table below.

**TABLE 9.1 - Market Definition and Sample Size
Fly/Drive, Highway, Ferry, and Campground Users**

Market	Definition	% of Alaska Market	Estimated Market Size	Sample Size	Maximum Margin of Error
Fly/Drive	Entered and exited Alaska via air; rented vehicle or RV	14%	268,000	1,086	±3.0%
Highway	Entered or exited Alaska via highway	4%	78,000	498	±4.4%
Ferry	Entered or exited Alaska via ferry, or used the ferry to travel between Alaska communities	2%	44,000	481	±4.4%
Campground Users	Spent at least one night in a campground	6%	109,000	613	±3.9%

The fly/drive, highway, and ferry markets are distinct in a number of ways.

- Visitors in all three of these markets were significantly less likely to purchase a multi-day package than the average Alaska visitor. Just 17 percent of ferry, 13 percent of fly/drive, and 3 percent of highway visitors reported purchasing a package.
- Nearly all fly/drive visitors visited Anchorage (92 percent), compared to half of highway and ferry visitors. Only 7 percent of fly/drive visitors visited any part of Southeast Alaska on their trip.
- Nearly half of highway visitors (44 percent) drove down to Haines or Skagway, or otherwise visited Southeast Alaska on their Alaska trip. While 31 percent of highway visitors travelled to Skagway, very few visited Juneau (5 percent) or Ketchikan (3 percent).
- Fly/drive visitors were much more likely to visit Denali National Park and Seward.
- Nearly three-quarters of fly/drive visitors reported participating in wildlife viewing activities. The next most popular activities for this market were shopping and hiking/nature walk.
- Over half of ferry visitors participated in shopping, wildlife viewing, cultural activities, and hiking/nature walk.
- Slightly less than a third of fly/drive, highway, and ferry visitor markets fished while in Alaska.
- Those travelling by ferry stayed in the state an average of 13.9 nights, longer than the other markets and the overall average.

- Over half of highway visitors have traveled to Alaska before, more than over markets and the statewide average. Highway visitors that had been to Alaska before had been an average of 7.7 times, significantly more than repeat visitors in other markets.
- A third of highway visitors hailed from Canada. Ferry and fly/drive visitors were most likely to be from Western U.S. (45 percent).
- Highway visitors were significantly more likely to stay at a campground or RV park, with over half using these facilities versus 15 percent of fly/drive and 23 percent of ferry visitors.
- Fly/drive and ferry visitors were especially likely to use the internet to plan their trip. They were also more likely than the overall market to use travelalaska.com and receive the State's official Vacation Planner.
- While in Alaska, fly/drive and ferry passengers spent almost \$2,000 per person, on average, compared to only \$936 per highway visitor. Campground users spent an average of \$1,466 per person during their Alaska trip.

**TABLE 9.2 - Trip Purpose and Packages
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Trip Purpose					
Vacation/pleasure	79	65	79	75	77
Visiting friends or relatives	13	18	17	17	21
Business	5	9	1	3	1
Business and pleasure	3	8	4	5	2
Purchased multi-day package (including cruise)					
Yes	64	13	3	17	8
Package type (Base: non-cruise, purchased package)					
Fishing lodge	49	35	8	28	32
Rail package	11	11	19	13	-
Wilderness lodge	10	12	19	13	19
Adventure tour	9	12	22	13	23
Motorcoach tour	8	4	22	3	4
Rental car/RV package	6	19	8	18	15
Hunting	2	1	-	-	6

**TABLE 9.3 - Transportation Modes
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Transportation Market					
Cruise	55	1	1	6	3
Air	40	99	-	52	60
Highway/ferry	5	-	99	42	37
Used to Travel Between Communities					
Tour bus/van	15	6	3	15	4
Rental vehicle	14	88	5	22	14
Alaska Railroad	14	10	3	13	3
Personal vehicle	9	2	39	15	25
Air	9	15	2	32	8
Rental RV	2	13	4	5	29
State ferry	2	4	11	87	8
Personal RV	1	<1	22	5	21

**TABLE 9.4 - Length of Stay, Destinations and Lodging Type
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Average length of stay in Alaska	9.2	9.4	11.6	13.9	14.4
Regions Visited					
Southeast	67	7	44	81	26
Southcentral	52	96	59	55	86
Interior	29	55	71	47	71
Southwest	4	6	1	5	4
Far North	2	3	6	5	5
Destinations Visited, Top 10					
Juneau	61	4	5	50	9
Ketchikan	58	1	3	36	7
Skagway	48	1	31	35	14
Anchorage	47	92	49	51	79
Glacier Bay Nat'l Park	29	2	2	8	4
Denali Nat'l Park	23	46	33	36	53
Seward	23	51	28	26	51
Fairbanks	17	28	41	25	37
Hoonah/Icy Strait Point	13	<1	1	3	3
Talkeetna	11	27	16	18	26
Lodging Types Used					
Cruiseship	57	1	1	6	3
Hotel/motel	37	73	30	64	27
Lodge	15	22	5	25	5
VFR	15	15	23	29	28
Campground/RV	6	15	49	23	100
B&B	4	17	5	15	4
Vacation rental	3	10	2	7	3
Wilderness camping	2	4	12	9	9
State ferry	1	<1	6	30	4

**TABLE 9.5 - Visitor Activities – Top 10
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Shopping	75	64	62	70	65
Wildlife viewing	45	72	40	60	70
Cultural activities	39	43	34	54	44
Day cruises	39	42	25	36	40
Hiking/nature walk	34	57	35	52	56
Train	32	11	9	21	7
City/sightseeing tours	31	18	14	21	17
Fishing	16	29	28	32	39
Flightseeing	13	17	9	19	12
Tramway/gondola	13	11	3	12	5

**TABLE 9.6 - Satisfaction Ratings
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Satisfaction with overall Alaska experience					
Very satisfied	75	71	66	79	70
Satisfied	23	26	30	18	28
Compared to expectations					
Much higher	29	27	29	34	25
Higher	36	40	28	33	33
About as expected	32	29	38	31	36
Value for the money, compared to other destinations					
Much better	15	7	11	16	11
Better	23	18	18	23	24
About the same	45	50	46	42	41
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska as a vacation destination	79	78	75	83	76
Very likely to return to Alaska in the next five years	40	50	52	44	45

**TABLE 9.7 - Previous Alaska Travel
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Been to Alaska before	40	45	56	47	45
Average # of vacation trips (base: repeat travelers)	4.1	4.6	7.7	4.7	5.6
Previously traveled in Alaska by cruise ship	16	11	14	10	11

**TABLE 9.8 - Trip Planning
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Trip Decision, by Quarter					
Before July 2015	14	8	17	16	12
July-Sept 2015	17	13	15	21	19
Oct-Dec 2015	17	16	9	14	13
Jan-Mar 2016	23	24	17	22	24
Apr-Jun 2016	20	27	30	19	25
July-Sept 2016	8	12	13	8	7
Trip Booking, by Quarter					
Before July 2015	6	1	1	2	1
July-Sept 2015	11	4	3	7	5
Oct-Dec 2015	15	12	5	14	9
Jan-Mar 2016	27	29	9	27	22
Apr-Jun 2016	29	37	42	34	37
July-Sept 2016	13	17	40	16	26
Internet and Travel Agent Usage					
Used internet	68	87	55	75	77
Booked over internet	58	81	34	59	63
Used TravelAlaska.com	18	31	21	31	33
Received Official State Vacation Planner	12	18	21	22	20
Booked through travel agent	35	10	4	19	9
Other Sources – Top 10					
Friends/family	51	51	39	48	49
Prior experience	23	28	30	30	29
Cruise line	22	2	1	3	2
Brochures	15	25	27	30	30
AAA	8	8	13	10	10
Other travel/guide book	6	11	11	15	16
Tour company	5	4	2	6	3
Magazine	5	7	8	10	10
Television	4	3	6	3	3
Milepost	4	10	37	17	31

**TABLE 9.9 - Top 10 Websites/Apps Used to Plan/Book
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors		Fly/Drive		Highway		Ferry		Campground Users	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	58	59	21	22	44	41	46	47
Cruise line websites	35	27	4	3	3	2	6	6	4	2
Google	28	4	36	9	47	10	35	5	40	7
Trip Advisor	23	3	29	6	25	6	31	7	23	3
Expedia	14	10	19	16	11	7	17	12	15	10
Hotel/lodge/RV Park	11	10	20	18	19	11	20	14	10	7
Tour company websites	11	8	17	13	10	6	15	12	14	9
Car/RV rental websites	10	9	38	35	9	8	12	12	28	26
Travelocity	7	2	7	3	6	2	6	3	5	2
Facebook	7	<1	6	<1	6	1	6	<1	5	<1

**TABLE 9.10 - Demographics
Fly/Drive, Highway, Ferry, and Campground Users (%)**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Origin					
Western US	38	45	29	45	33
Southern US	21	19	14	15	19
Midwestern US	15	17	11	12	16
Eastern US	10	9	4	4	9
Canada	7	1	34	10	9
Other International	9	9	8	13	14
Other Demographics					
Average party size	2.4	2.5	2.0	2.2	2.6
Average group size	4.2	3.4	2.7	3.1	3.5
Male/female	49/51	56/44	55/45	54/46	54/46
Average age	53.7	48.7	54.6	55.2	48.5
Children in household	23	28	14	14	22
Retired/semi-retired	44	31	55	51	40
College graduate	63	68	52	67	65
Average income	\$114,000	\$120,000	\$92,000	\$108,000	\$102,000

**TABLE 9.11 – Average Spending in Alaska, Per Person, Per Trip
Excluding Transportation to/from Alaska
Fly/Drive, Highway, Ferry, and Campground Users**

	All Visitors	Fly/Drive	Highway	Ferry	Campground Users
Average per-trip spending	\$1,057	\$1,948	\$936	\$1,914	\$1,466