



Alaska 2022-2023 Visitor Profile Report

Destination  Analysts





EXECUTIVE SUMMARY

Alaska's tourism industry is experiencing a steady rebound from the COVID-19 pandemic and continues to be a major economic driver in the state. The Alaska Travel Industry Association's Visitor Profile Study representing travel for the summer of 2022 and winter of 2022/2023 serves as baseline research to demonstrate where Alaska was positioned immediately following the COVID-19 pandemic. This study is only one piece of ATIA's data matrix and is part of a larger picture the organization is analyzing as it continues to plan for the future of Alaska's tourism industry.

Knowing that 2022 was not a typical travel year, this research will allow ATIA to build on this foundational knowledge coming out of the pandemic. Key factors that were observed during the study's timeframe included:

- Due to ongoing travel restrictions, Alaska's international travel market rebound was slowed.
- Booking windows were shorter and continued to fluctuate.
- Alaska's cruise industry rebounded but did not operate at full capacity.
- Independent travel continued to contribute to the state's tourism recovery.

Data was collected from May 2022-April 2023 (summer of 2022 and winter 2022/2023), and resulted in the following highlights:

DEMOGRAPHICS

- In 2022-2023, visitors to Alaska were 48 years of age on average, skewed slightly more male (56%), were likely to be married (72%), and had an average household income of over \$117,000 per year. One third had children in their household (33%). The majority of visitors identified as White/Caucasian (80%). One in ten had accessibility needs in their travel party (16%).

TRIP PURPOSE

- Half of visitors to Alaska in 2022-2023 were independent travelers (50%). Less than half were cruise travelers (43%) or on a guided group tour (6%).
- Three quarters of visitors were traveling for leisure purposes (80%). This was followed distantly by visiting friends/family (14%) and for business (4%). For half of visitors (51%), it was their first trip to the state.
- Among the selection factors for choosing Alaska as a travel destination, half of visitors came for the scenic beauty (51%), nature/outdoors (46%), and/or wildlife (41%). This was followed by bucket list trip (31%), rest/relaxation (30%), and/or adventure (29%).

TRIP DETAILS

- On average, visitors to Alaska spent 8.3 nights in Alaska in 2022-2023. Almost half of visitors stayed on a cruise ship (45%), while three in ten stayed in a hotel (30%). A much smaller percentage stayed with friends/family (14%), in a vacation rental (11%), or in a resort/lodge (10%).
- More than half of visitors to Alaska in 2022-2023 traveled with their spouse/significant other (55%). Around one quarter were traveling solo (21%). Around one in ten were traveling with a group of friends (12%) or their extended family (9%). One in five brought their children under the age of 18 (13%). On average, travel parties consisted of 2.2 persons.
- The majority of visitors to Alaska in 2022-2023 went to the Inside Passage (56%), while half visited the Southcentral region (54%) and one quarter visited the Interior (26%). Less than one in ten visitors went to the Southwest (7%) and/or the Arctic (3%).
- On average, visitors to Alaska spent \$1,434 per person per trip in-destination. Food/dining accounted for the largest share of wallet (\$300 per person per trip), followed by lodging (\$274), shopping (\$256) and outdoor recreation/sightseeing/entertainment (\$250). Just under one in five visitors pre-purchased a package prior to arrival (19%).

SATISFACTION, RECOMMEND, & RETURN

- Visitors to Alaska were largely satisfied with their overall trip in 2022-2023 (88%). Satisfaction was highest for service/hospitality (86%) and lowest for value for money (71%) and lodging (62%). Eight in ten visitors (82%) said they are likely to return in the future.



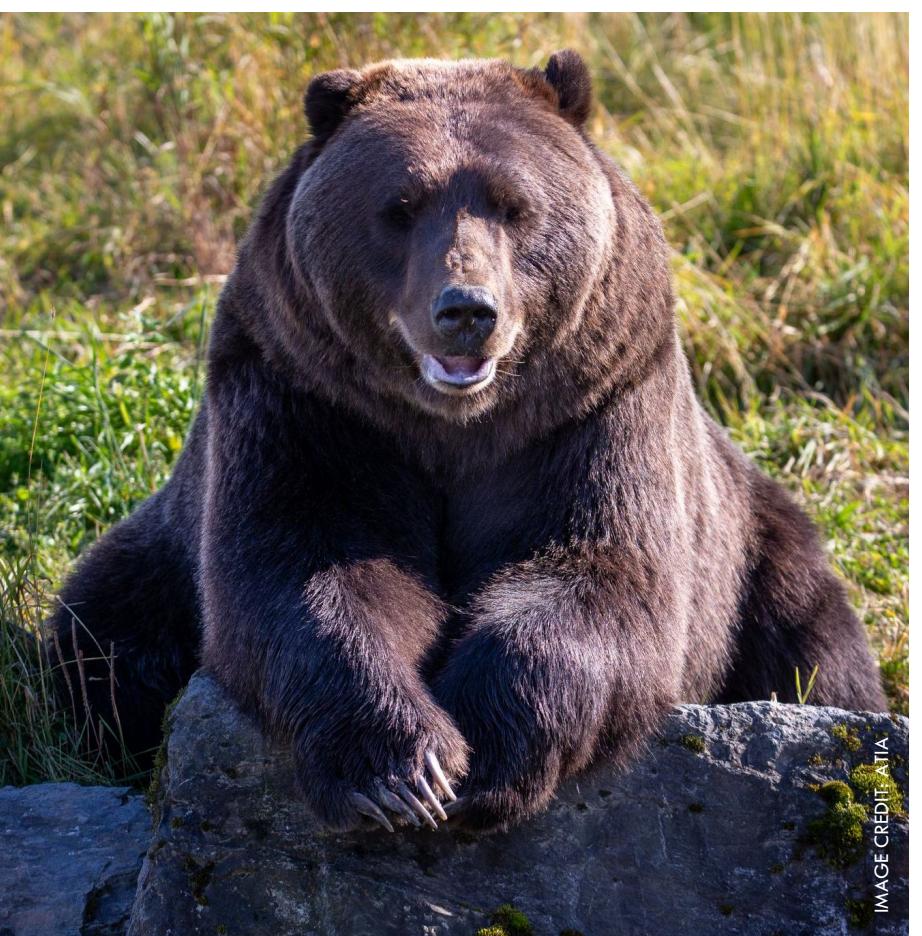
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RESEARCH OBJECTIVES

This report presents the findings of the 2022-2023 Visitor Profile study of travelers to Alaska, conducted by Destination Analysts on behalf of the Alaska Travel Industry Association. The study was conducted in three parts, with the primary objectives of:

- Developing a profile of Alaska visitors, including their psychographics, travel personas, and demographics
- Understanding their travel behaviors and motivations, as well as in-destination activities and spend
- Collecting data to calculate Alaska visitor volume and spending estimates by region and segment
- Gauging visitors' in-destination experience and identifying what is successful, what can be added, and what can be improved



RESEARCH METHODOLOGY

The three components of the 2022-2023 Visitor Profile study included:

1. Intercept survey of visitors to Alaska, collected monthly. Intercept sites included Anchorage, Denali, Fairbanks, Juneau, Kenai Peninsula, and Cordova.
2. Online panel survey of U.S. travelers who visited Alaska.
3. Online survey of Alaska Travel Industry Association partners' owned audiences who visited Alaska.

A total of 4,256 surveys were collected for travel between May 2022 – April 2023. This include 1,900 intercept surveys, 1,190 panel surveys, and 1,166 partner surveys. Participants were age 18+ and must have resided outside Alaska. Results were weighted by the volume estimates, as well as origin and destination markets using geolocation data.



DEFINITIONS

Total Visitors – All visitors who traveled to Alaska between May 2022 – April 2023.

Domestic/U.S. Visitors – Visitors who reside in the U.S.

Western U.S. Visitors – Visitors who reside in the 12 states east of the Rockies, including California, Washington, Oregon, Idaho, Nevada, Arizona, New Mexico, Colorado, Utah, Wyoming, Montana, and Hawaii.

Eastern U.S. Visitors – All other U.S. visitors who do not reside in the 12 western states.

International Visitors – Visitors who reside outside the U.S.

Cruise Visitors – Visitors who arrived or departed Alaska by cruise ship.

Guided Group Visitors – Visitors who traveled to Alaska via a guided group tour.

Independent Visitors – Visitors who did not travel to Alaska via cruise ship or on a guided group tour.



VISITOR SUMMARY



2022-2023 VISITORS Who They Are

Gender



Female: 44%
Male: 56%

Ethnicity

White/Caucasian: 80%
Black/African American: 6%
Hispanic/Latino: 5%
Asian/Pacific Islander: 5%
Native American/Indigenous: 3%

Average Age: 48.4



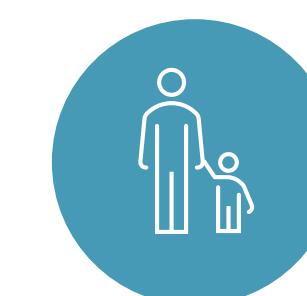
Gen Z: 4%
Millennials: 33%
Gen Xers: 24%
Boomers or older: 38%



Household Income



\$117,664



Children in Household

Under 18: 33%

Marital Status

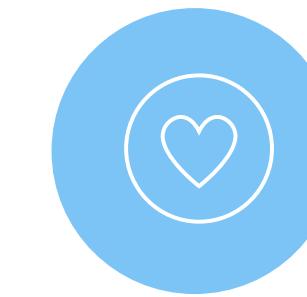


Married/partnered: 72%
Single: 17%



Accessibility

Accessibility Needs in Travel Party: 16%



Orientation

LGBTQ+: 7%

2022-2023 VISITORS *Trip Details*



AVERAGE LENGTH OF STAY

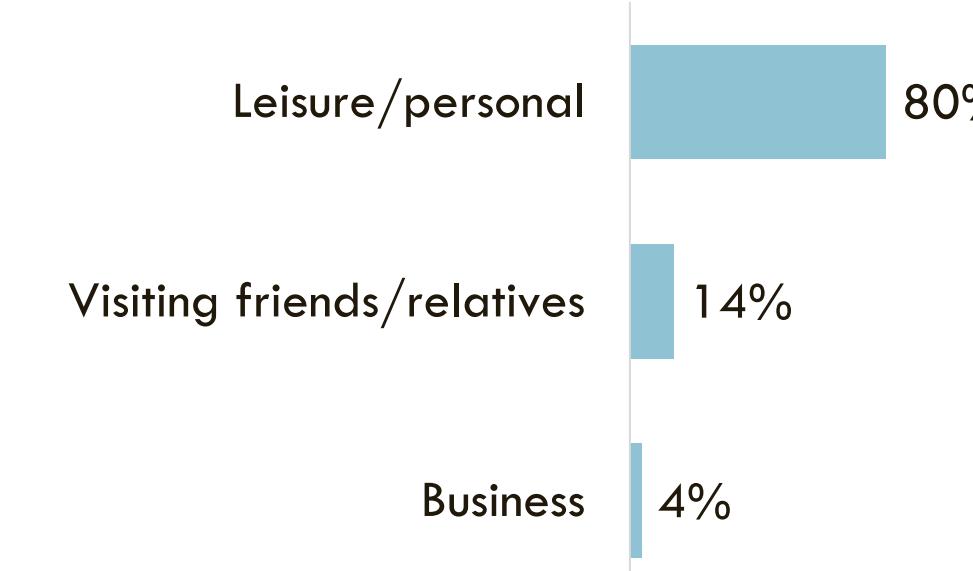
8.3

NIGHTS

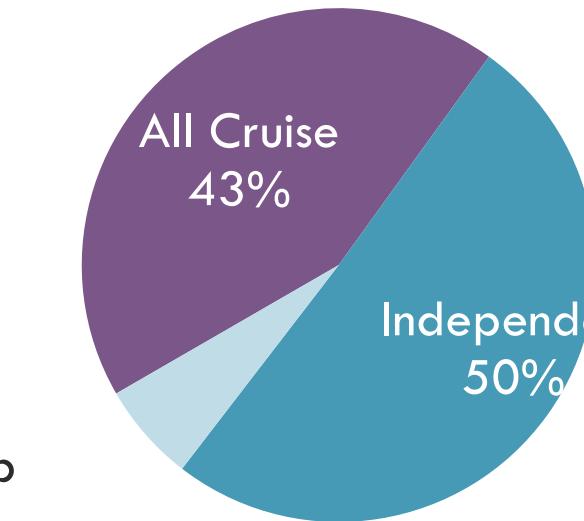
TOP ACTIVITIES

Local cuisine	68%
Wildlife viewing	66%
Shopping	54%
Breweries/distilleries	38%
Museums/galleries	37%
Photography	37%
Hiking	36%

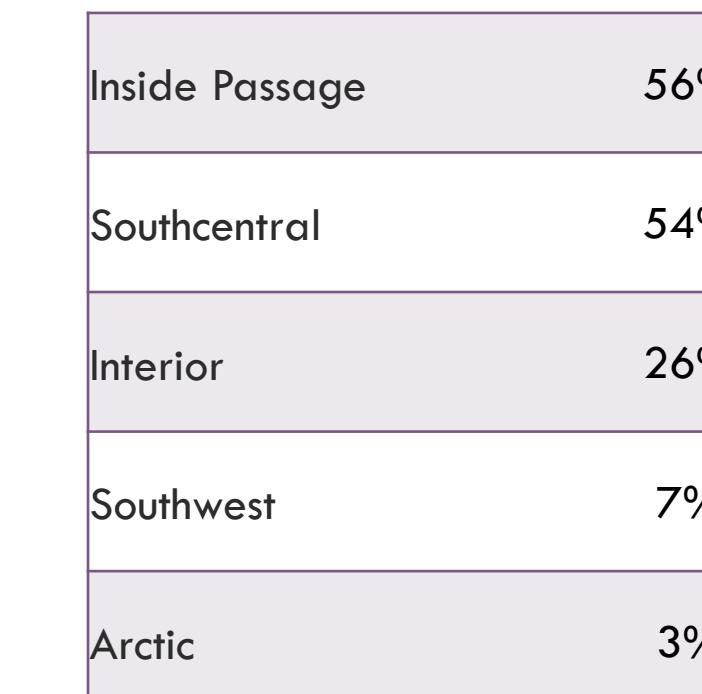
PRIMARY PURPOSE



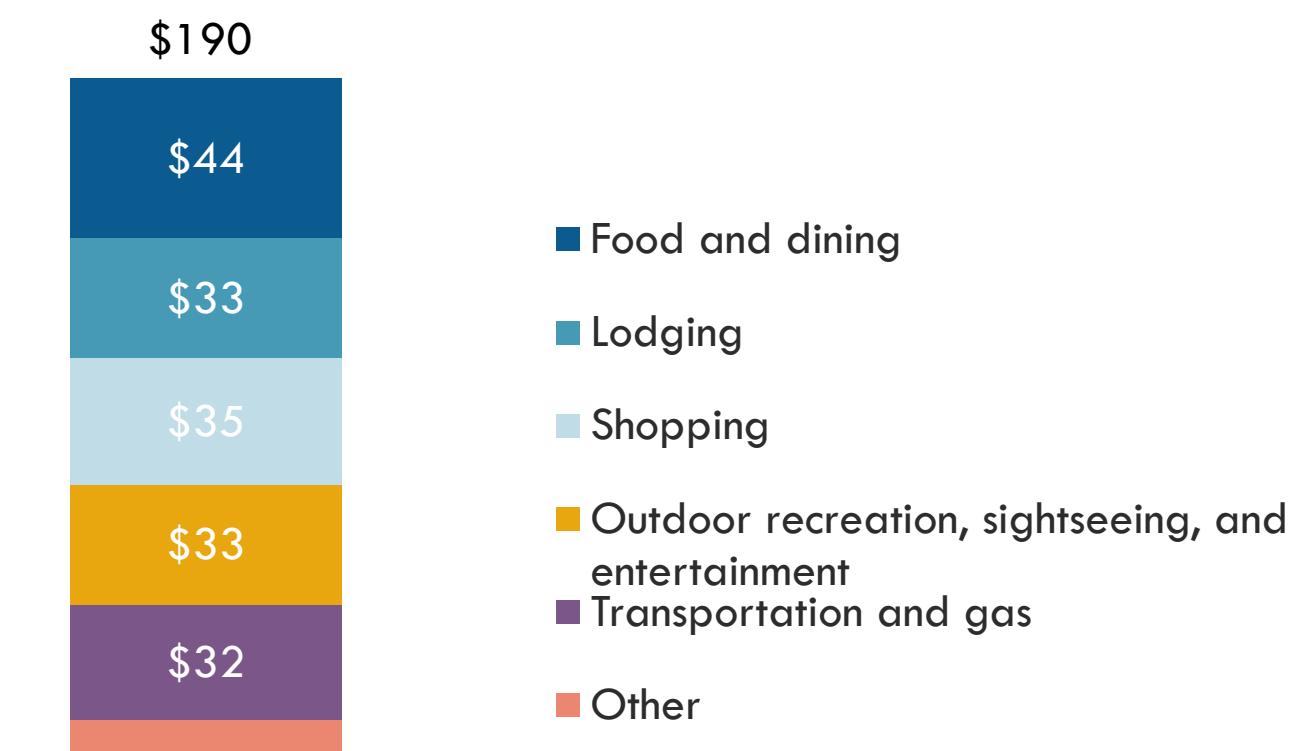
TRAVELER TYPE



REGION VISITED



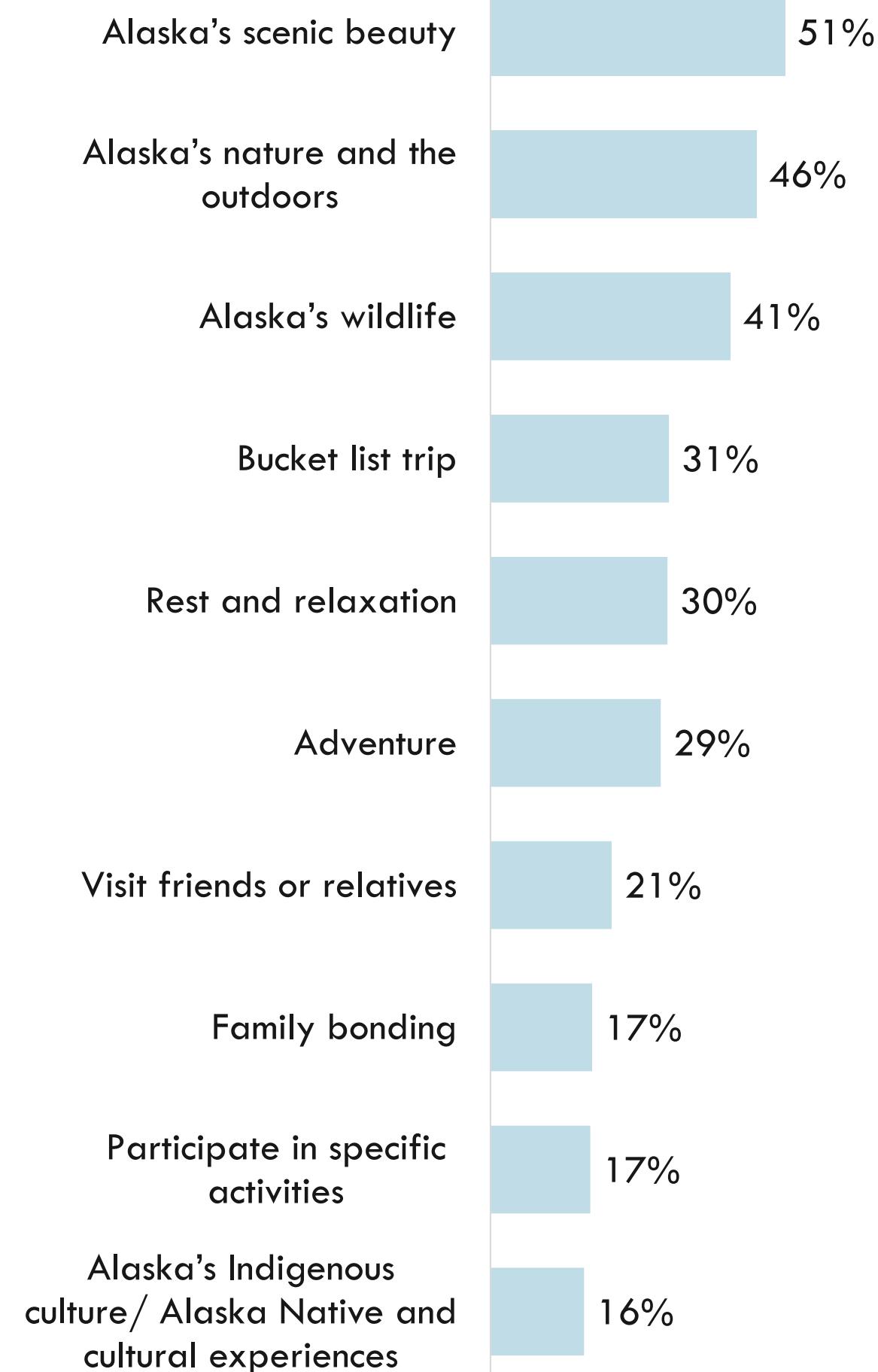
AVERAGE DAILY SPEND PER PERSON



2022-2023 VISITORS *Destination Perceptions*



SELECTION FACTORS



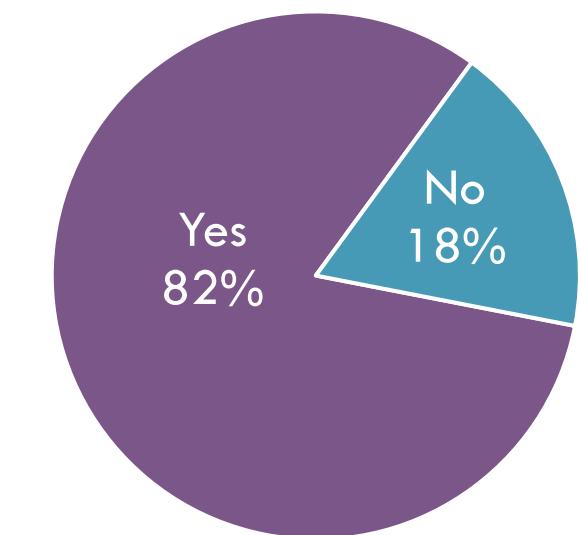
SATISFACTION RATING



LIKELIHOOD TO RECOMMEND – TOP 3 BOX

92%

LIKELIHOOD TO RETURN

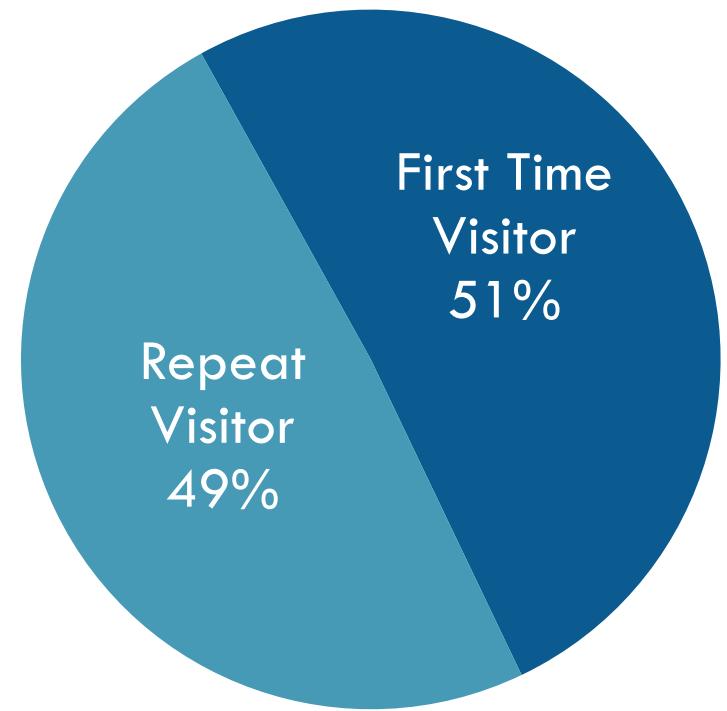


A photograph of a person standing in a snowy, mountainous landscape at night. The sky is filled with a vibrant green aurora borealis, with streaks of light extending across the dark blue and black sky. The person is wearing a dark jacket with yellow stripes on the sleeves and dark pants, standing on a snow-covered ground. In the background, there are dark silhouettes of trees and possibly some buildings or structures.

TRIP DETAILS

FIRST TIME VS REPEAT VISITATION

First Time vs Repeat Visitation



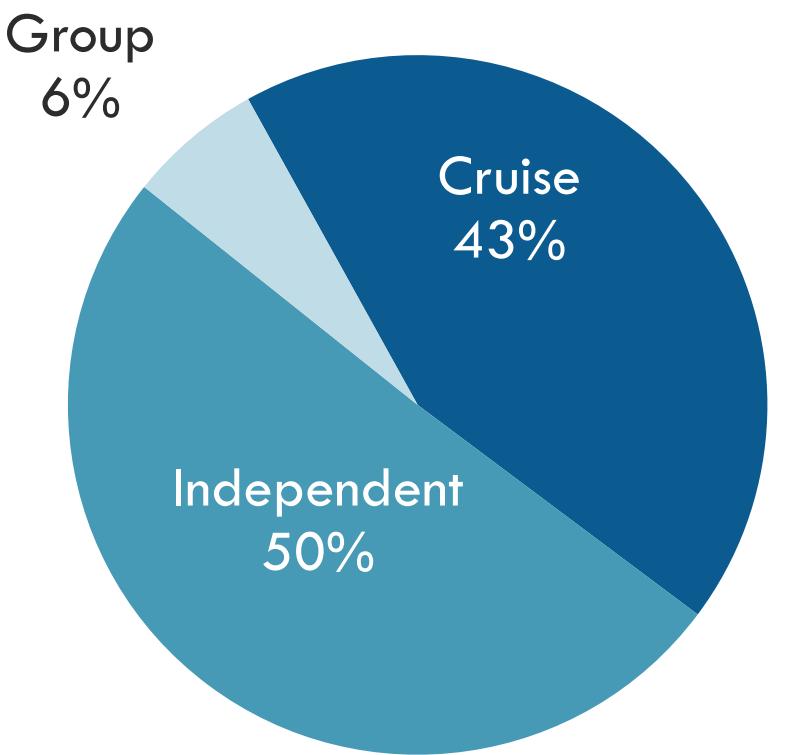
Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
First Time	51%	44%	70%	65%	42%	57%	63%
Repeat Visitor	49%	56%	30%	35%	58%	43%	37%

Question: Is this your first visit to Alaska as an adult (after age 18)? Base: Intercept, 1,868 respondents.

VISITOR TYPE

Visitor Type



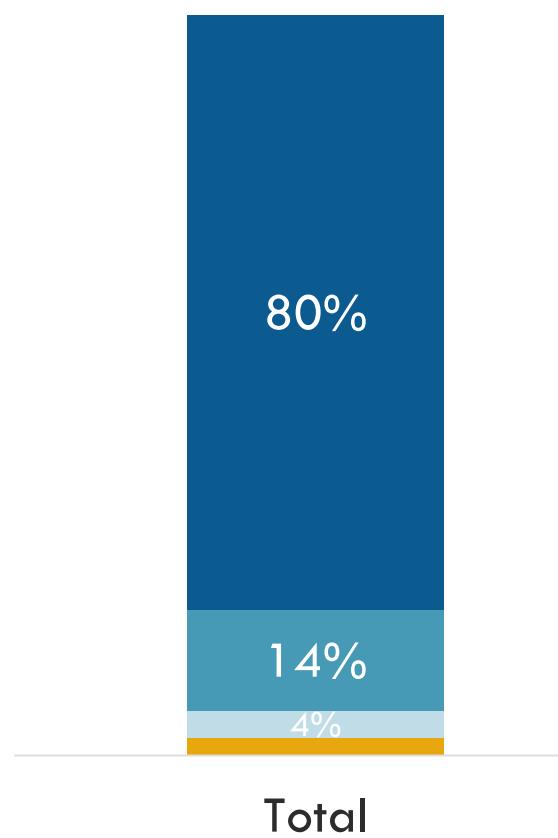
Detail by Segment

	Total Visitors	Origin Region		
		Western US	Eastern US	International
Cruise	43%	38%	46%	54%
Independent	50%	57%	47%	41%
Guided Group	6%	6%	7%	5%

Base: Total, 4,256 respondents.

PRIMARY PURPOSE OF TRIP

Primary Purpose of Trip



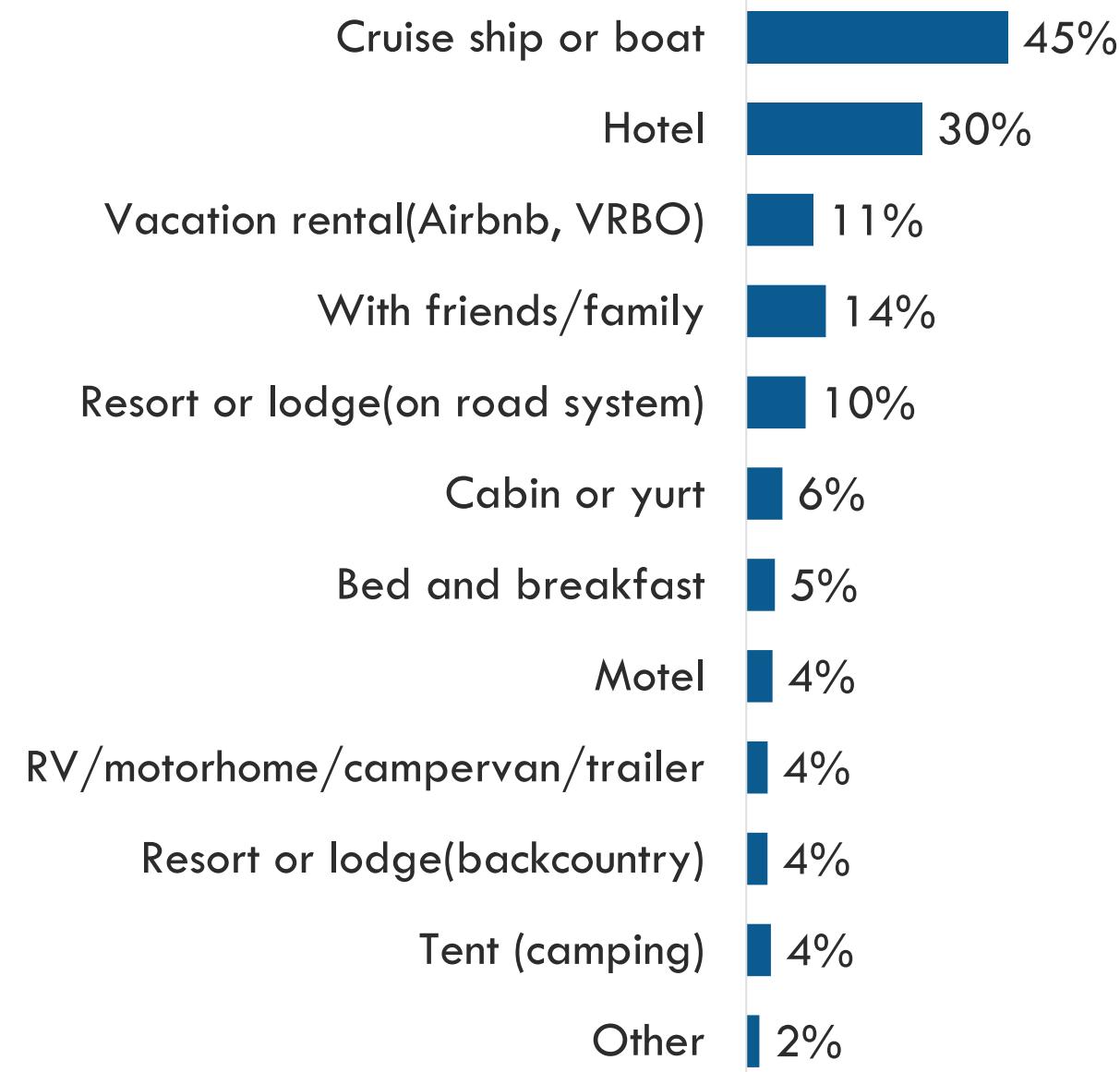
Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Leisure or personal travel	80%	64%	97%	85%	76%	82%	90%
Visiting friends or relatives	14%	24%	3%	4%	18%	12%	5%
Business trip	4%	7%	0%	4%	4%	3%	2%
Conference, convention, or group meeting	0%	0%	0%	2%	0%	0%	0%
Government travel	0%	0%	0%	1%	0%	0%	0%
Other	2%	4%	0%	4%	2%	3%	1%

Question: What best describes the purpose of your trip to Alaska? Base: Total, 4,116 respondents.

ACCOMMODATION TYPE

Accommodation Type



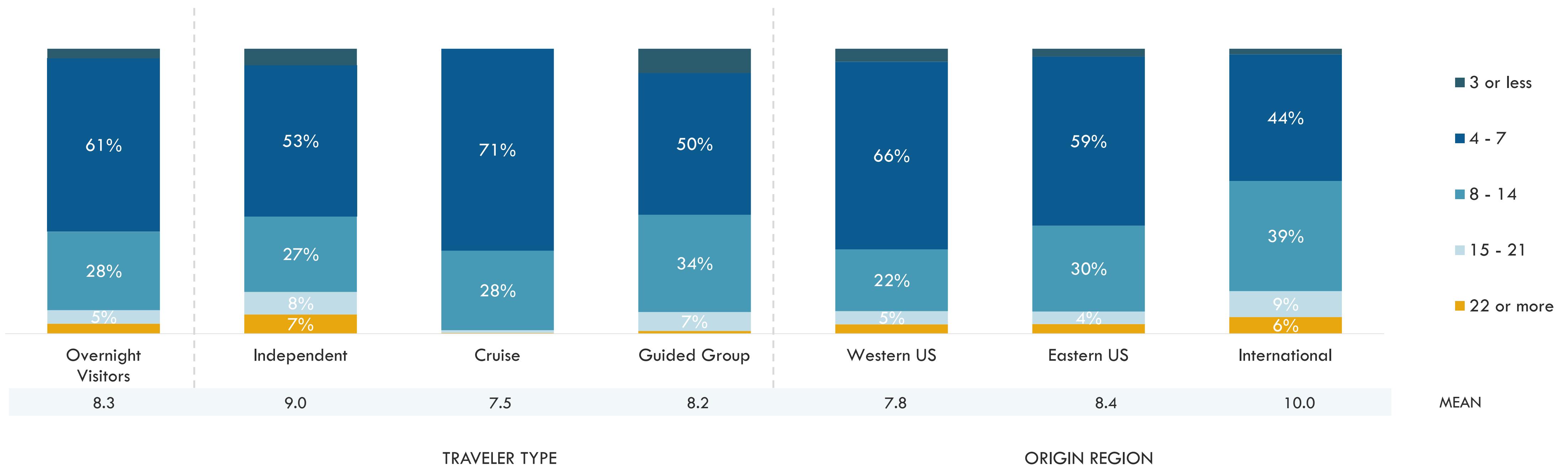
Detail by Segment

	Total	Traveler Type				Origin Region		
		Overnight Visitors	Independent	Cruise	Guided Group	Western US	Eastern US	International
Cruise ship or boat	45%	0%	100%	0%	39%	48%	56%	
Hotel	30%	42%	13%	62%	28%	31%	34%	
Vacation rental (Airbnb, VRBO)	11%	18%	3%	20%	11%	12%	11%	
With friends/ family	14%	25%	1%	12%	18%	11%	7%	
Resort or lodge (on road system)	10%	10%	7%	31%	8%	11%	9%	
Cabin or yurt	6%	10%	1%	12%	6%	6%	6%	
Bed and breakfast	5%	6%	2%	21%	4%	6%	4%	
Motel	4%	5%	2%	13%	3%	5%	5%	
RV/ motorhome/ campervan/ trailer	4%	6%	1%	6%	3%	4%	7%	
Resort or lodge (backcountry)	4%	3%	2%	23%	3%	4%	2%	
Tent (camping)	4%	7%	1%	9%	4%	4%	6%	
Other	2%	4%	0%	0%	3%	2%	2%	

Question: What types of lodging did you/will you stay in on this trip? Select all that apply. Base: Total, 4,117 respondents.

LENGTH OF STAY – NIGHTS

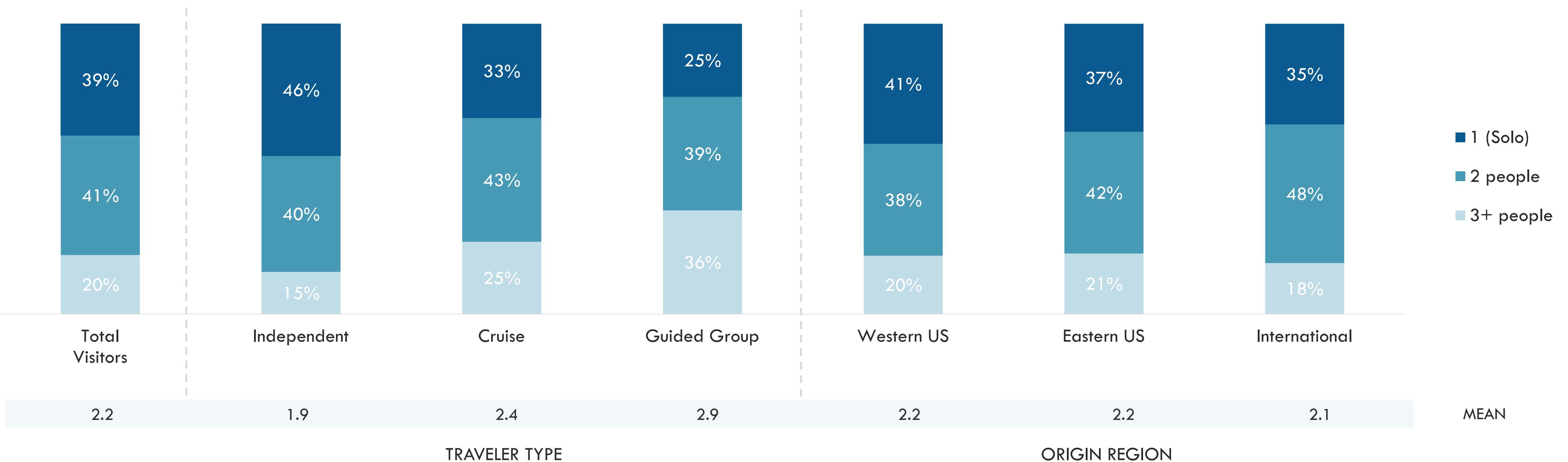
Average Length of Stay – Nights



Base: Total, 4,040 respondents.

TRAVEL PARTY SIZE

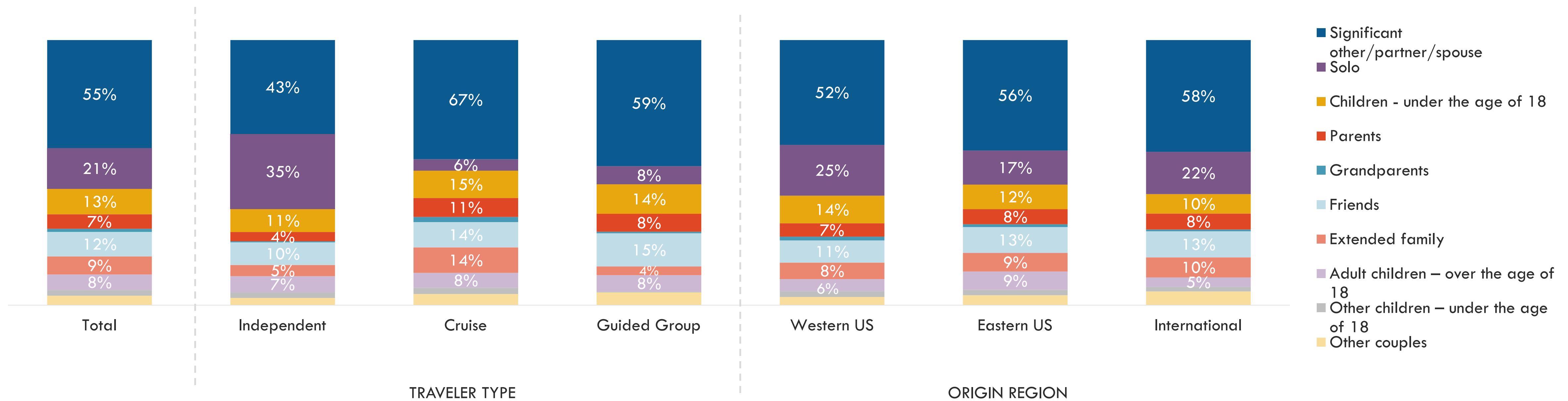
Travel Party Size



Base: Total, 4,087 respondents.

TRAVEL PARTY COMPOSITION

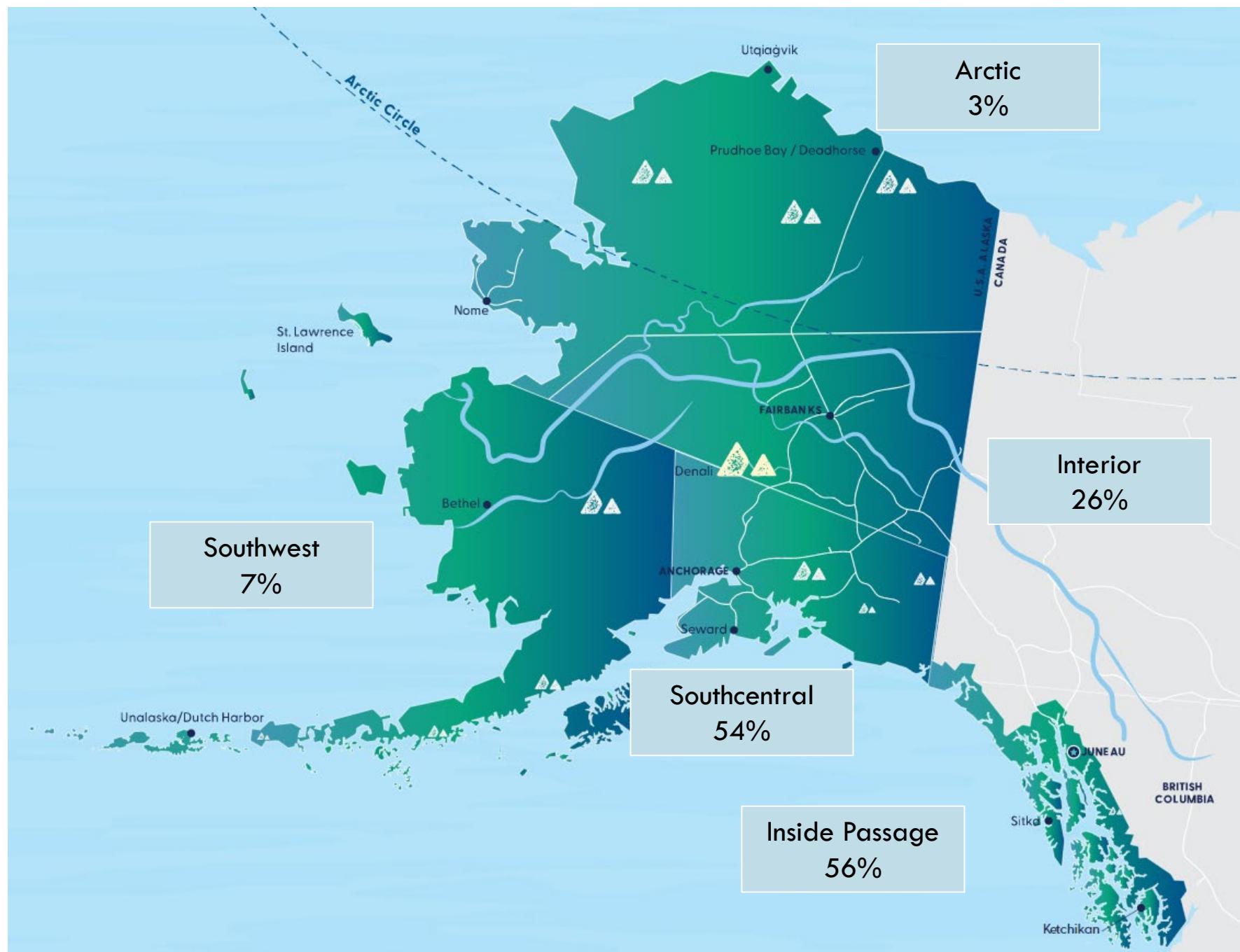
Travel Party Composition



Question: Who are you traveling with you on this trip? Select all that apply. Base: Total, 4,117 respondents.

AREAS VISITED

Area Visited



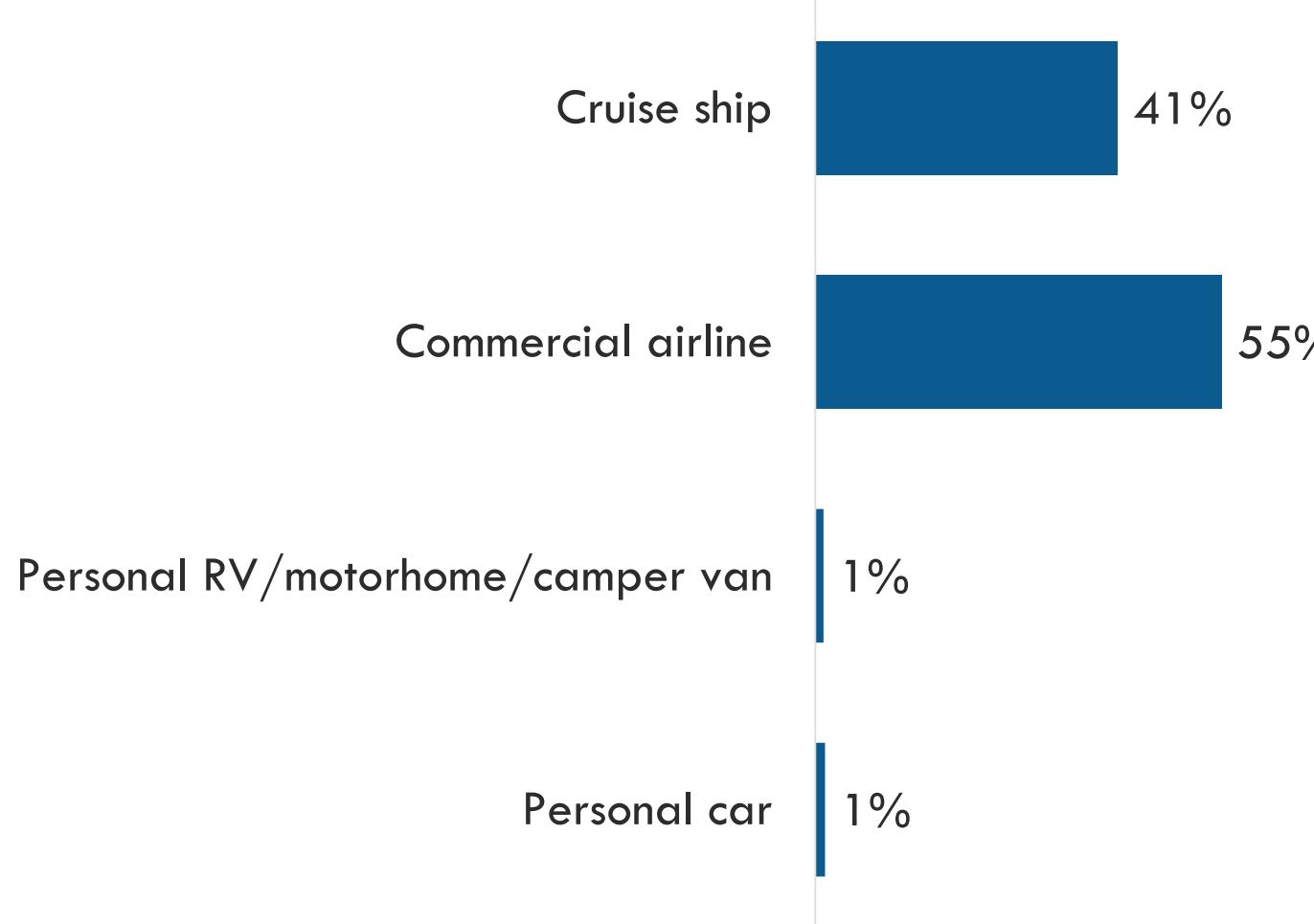
Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Inside Passage	56%	16%	100%	56%	48%	60%	68%
Southcentral	54%	76%	27%	72%	55%	52%	63%
Interior	26%	36%	10%	62%	23%	28%	32%
Southwest	7%	9%	2%	18%	5%	8%	3%
Arctic	3%	5%	1%	12%	3%	4%	3%

Question: How many nights did you stay/are you staying in each region on this trip? Base: Total, 4,040 respondents.

ARRIVAL TRANSPORTATION

Arrival Transportation



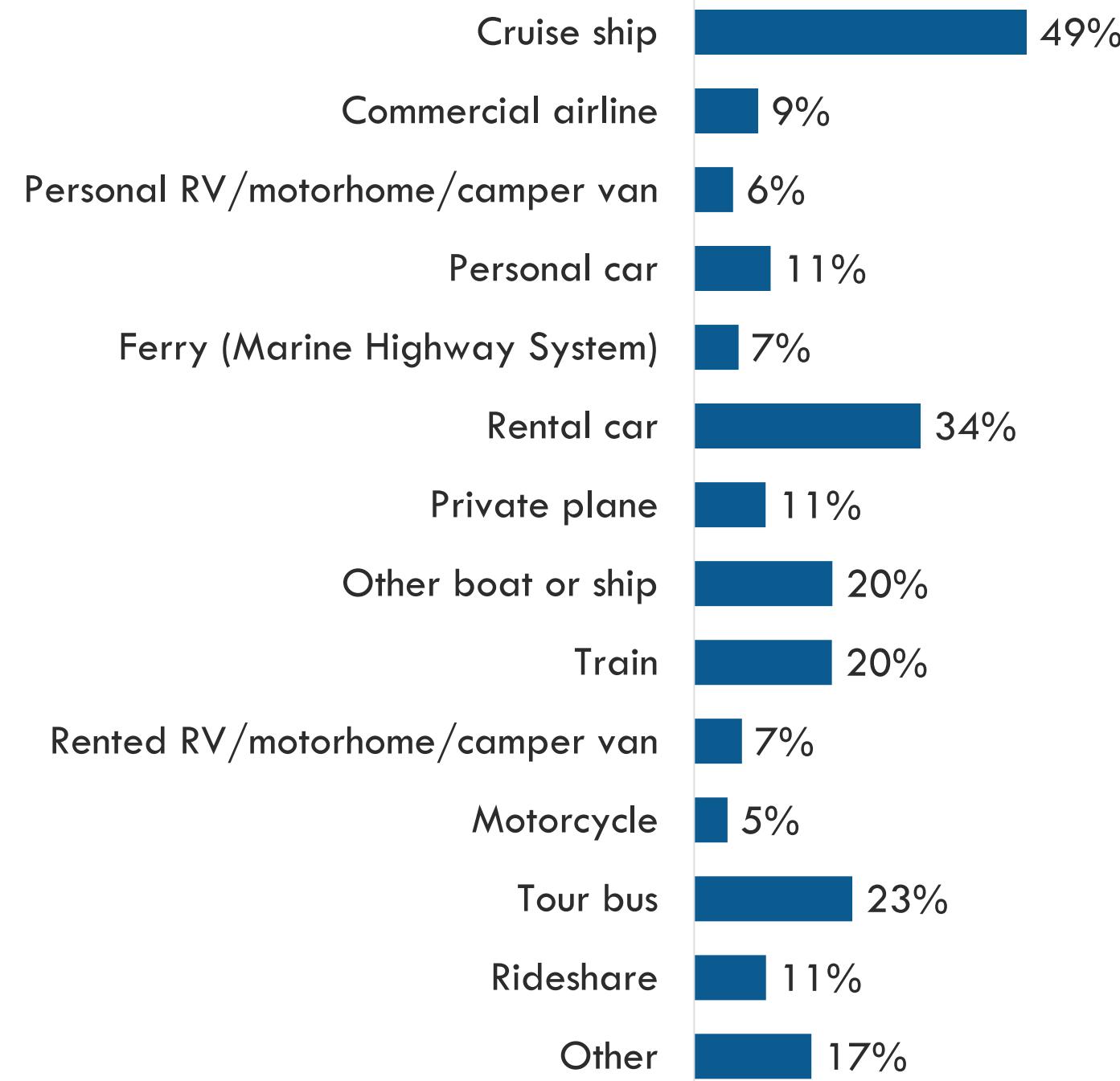
Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Cruise ship	41%	0%	86%	0%	36%	44%	48%
Commercial airline	55%	94%	9%	77%	60%	53%	40%
Personal RV/ motorhome/ camper van	1%	2%	0%	2%	1%	1%	4%
Personal car	1%	2%	0%	7%	2%	1%	2%
Ferry (Marine Highway System)	0%	0%	0%	1%	0%	0%	0%
Rental car	0%	0%	0%	2%	0%	0%	1%
Private plane	0%	0%	0%	1%	0%	0%	1%
Other boat or ship	0%	0%	0%	2%	0%	0%	1%
Train	0%	0%	0%	1%	0%	0%	0%
Rented RV/ motorhome/ camper van	0%	0%	0%	1%	0%	0%	1%
Motorcycle	0%	0%	0%	0%	0%	0%	0%
Tour bus	0%	0%	0%	1%	0%	0%	0%
Rideshare	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	1%	0%	0%	0%

Question: What mode type of transportation did you use to... Base: Total, 4,117 respondents.

IN-DESTINATION TRANSPORTATION

Transportation



Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Cruise ship	49%	2%	100%	11%	42%	53%	60%
Commercial airline	9%	9%	9%	13%	10%	9%	4%
Personal RV/motorhome/camper van	6%	3%	8%	8%	6%	6%	6%
Personal car	11%	13%	9%	13%	14%	10%	7%
Ferry (Marine Highway System)	7%	4%	9%	14%	6%	8%	3%
Rental car	34%	44%	21%	37%	34%	34%	21%
Private plane	11%	7%	13%	25%	10%	11%	9%
Other boat or ship	20%	18%	21%	35%	19%	21%	22%
Train	20%	11%	29%	42%	16%	23%	23%
Rented RV/motorhome/camper van	7%	4%	10%	14%	6%	8%	4%
Motorcycle	5%	1%	8%	13%	5%	5%	1%
Tour bus	23%	10%	36%	44%	19%	26%	31%
Rideshare	11%	9%	11%	22%	10%	10%	15%
Other	17%	26%	8%	12%	21%	15%	18%

Question: What mode type of transportation did you use to... Base: Total, 4,117 respondents.

TRAVEL PACKAGE (NON-CRUISE TRAVELERS)

Purchased Travel Package



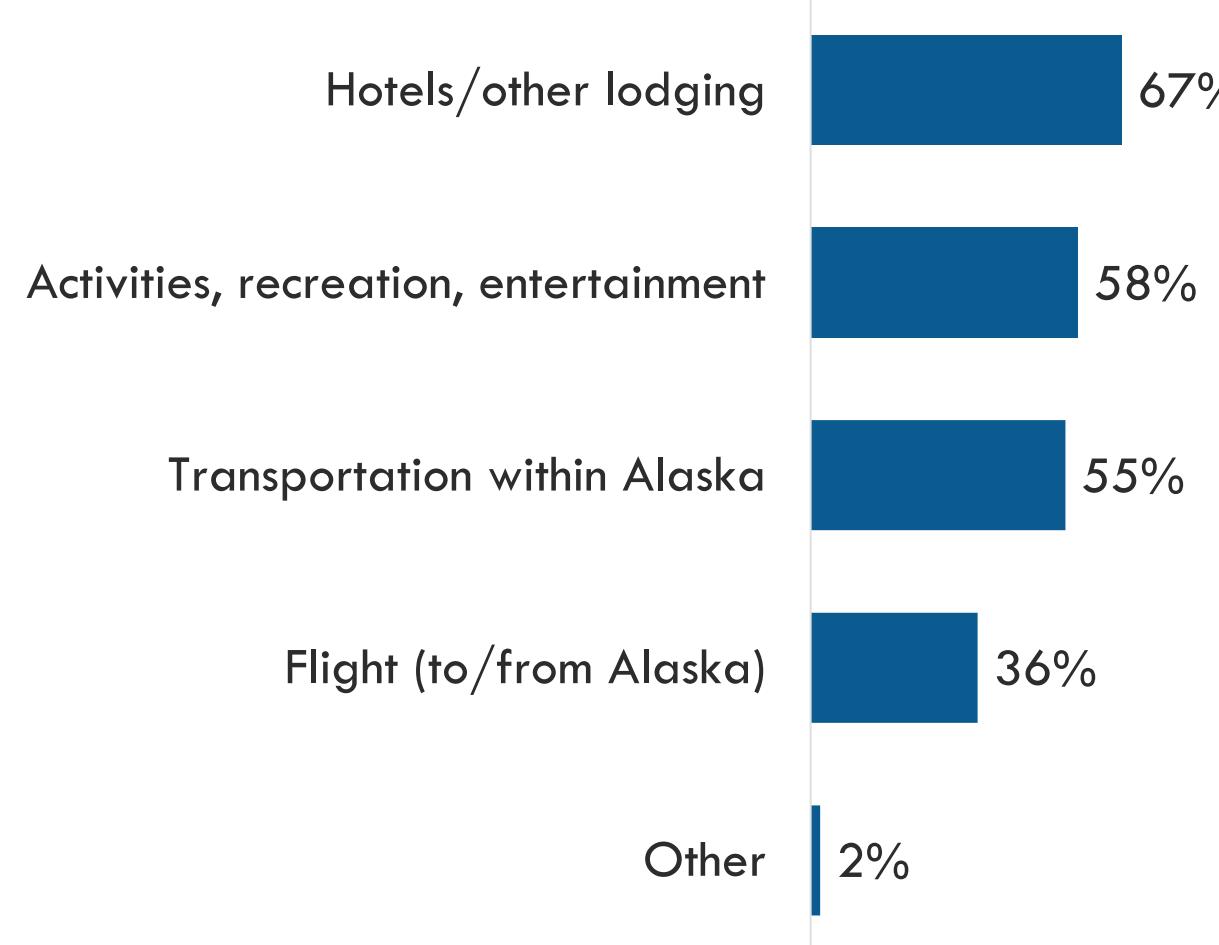
Detail by Segment

	Total Visitors	Origin Region		
		Western US	Eastern US	International
Purchased Travel Package	19%	15%	22%	18%
Did Not Purchase Travel Package	81%	85%	78%	82%

Question for visitors who did not come via cruise: Before arriving, did you purchase a package that included any combination of flight, hotel, transportation, or activities in Alaska? Base: Total, 2,505 respondents.

TRAVEL PACKAGE ITEMS (NON-CRUISE TRAVELERS)

Accommodation Type



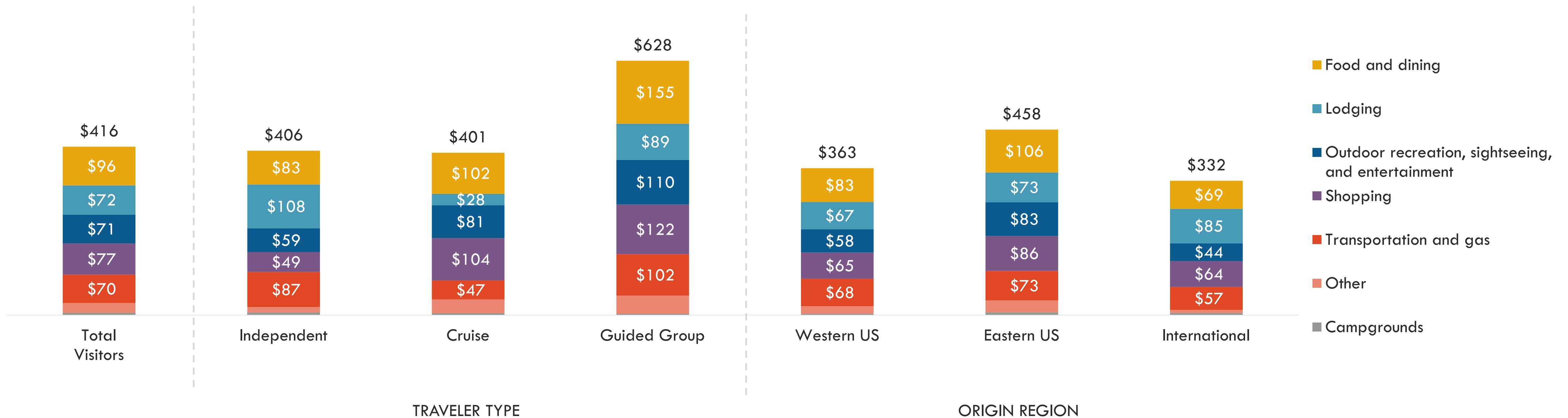
Detail by Segment

	Total Visitors	Origin Region		
		Western US	Eastern US	International
Hotels/other lodging	67%	59%	70%	84%
Activities, recreation, entertainment	58%	60%	57%	61%
Transportation within Alaska	55%	46%	58%	72%
Flight (to/from Alaska)	36%	41%	32%	58%
Other	2%	0%	3%	0%

Question: Which components of your travel were included in this package? Select all that apply. Base: Travel Package Purchaser, 235 respondents.

PER PARTY PER DAY SPEND

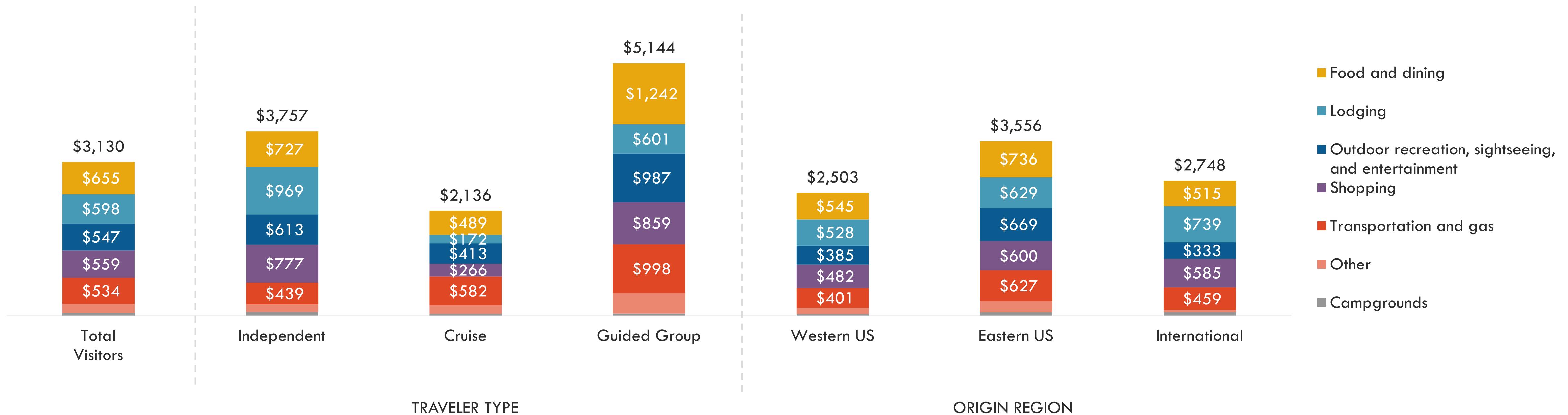
Average Daily Spend per Party



Question: PER DAY, approximately how much will you spend on each of the following? Base: Total, 4,007 respondents.

PER PARTY PER TRIP SPEND

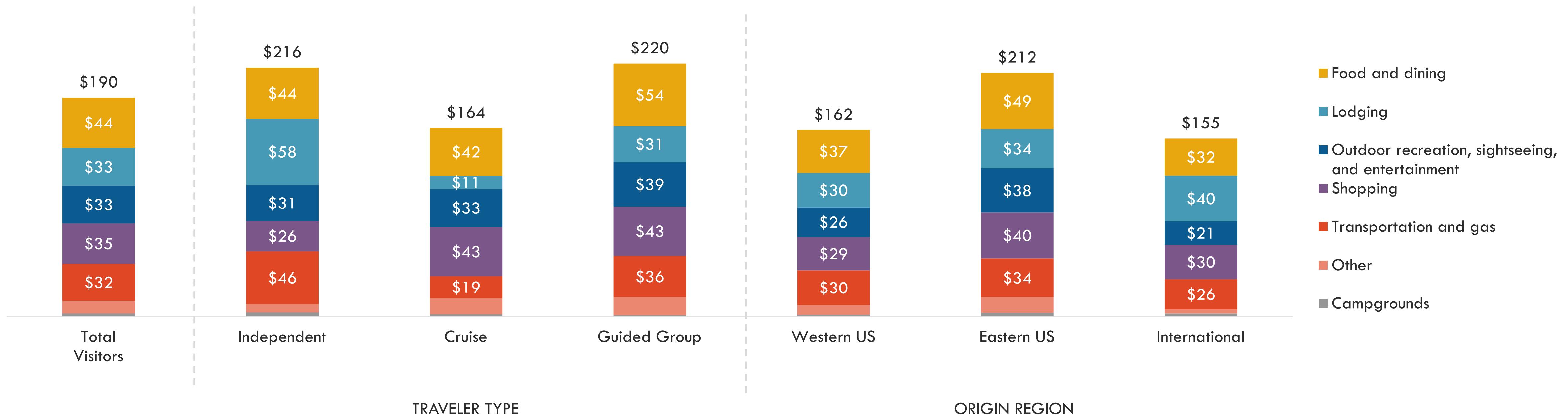
Average Trip Spend per Party



Question: PER DAY, approximately how much will you spend on each of the following? Base: Total, 4,007 respondents. Length of stay for Cruise and Group visitors is based on reported days spent on land before or after their cruise or guided group tour.

PER PERSON PER DAY SPEND

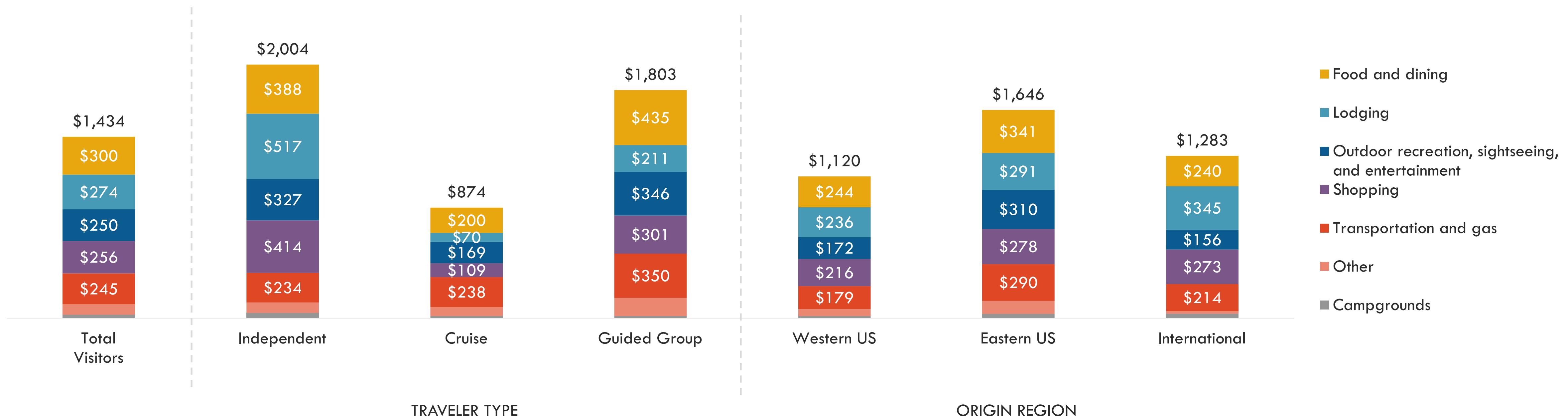
Average Daily Spend per Person



Question: PER DAY, approximately how much will you spend on each of the following? Base: Total, 4,007 respondents.

PER PERSON PER TRIP SPEND

Average Trip Spend per Person



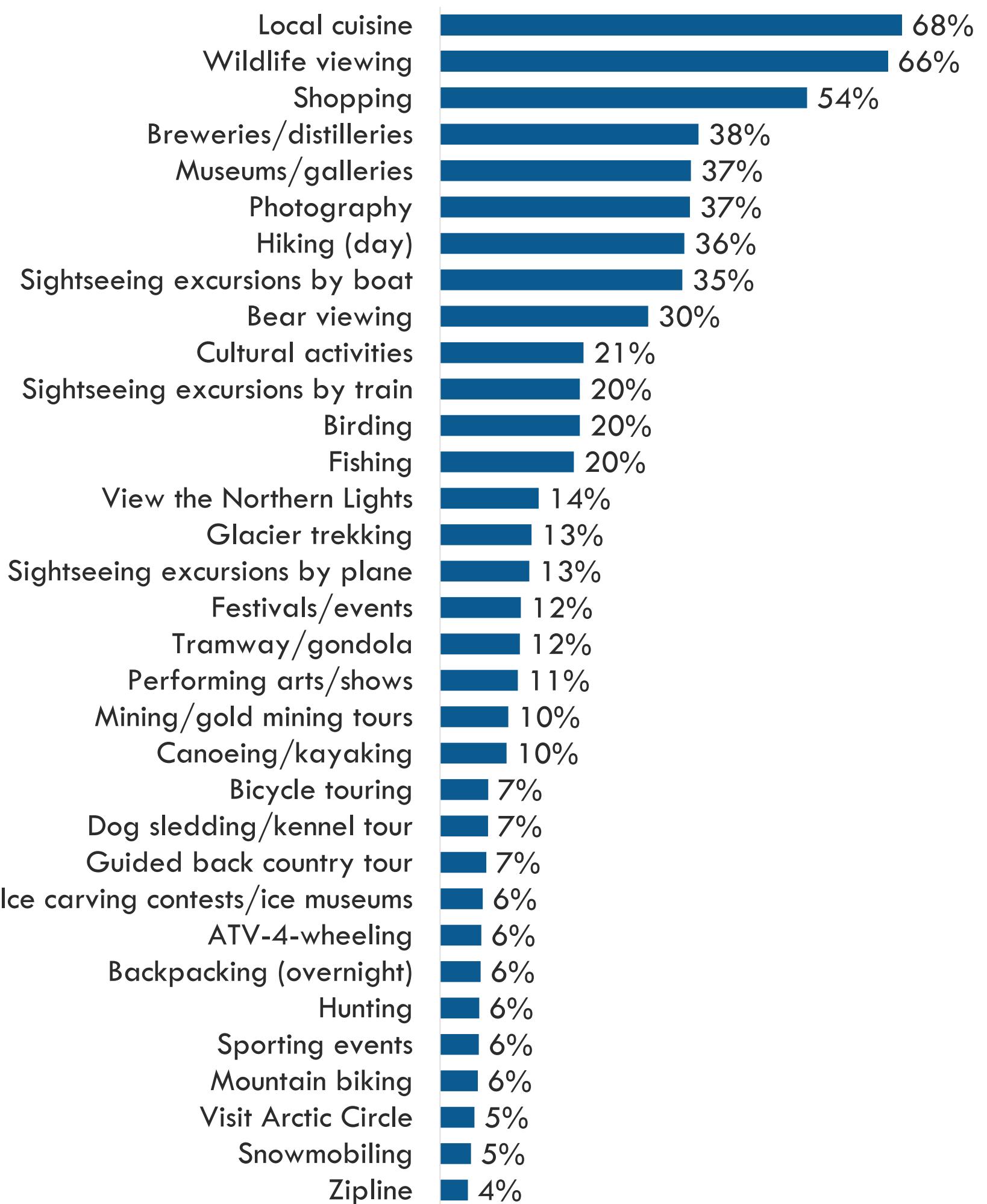
Question: PER DAY, approximately how much will you spend on each of the following? Base: Total, 4,007 respondents. Length of stay for Cruise and Group visitors is based on reported days spent on land before or after their cruise or guided group tour.

A photograph of three people wearing safety gear (yellow helmets, harnesses, and orange backpacks) walking across a glacier. They are dressed in outdoor clothing like red, purple, and green jackets. The glacier has large, textured ice formations. A woman in a green jacket is gesturing towards the ice.

VISITOR ACTIVITIES

IN-DESTINATION ACTIVITIES

In-Destination Activities



Base: Total, 4,117 respondents.

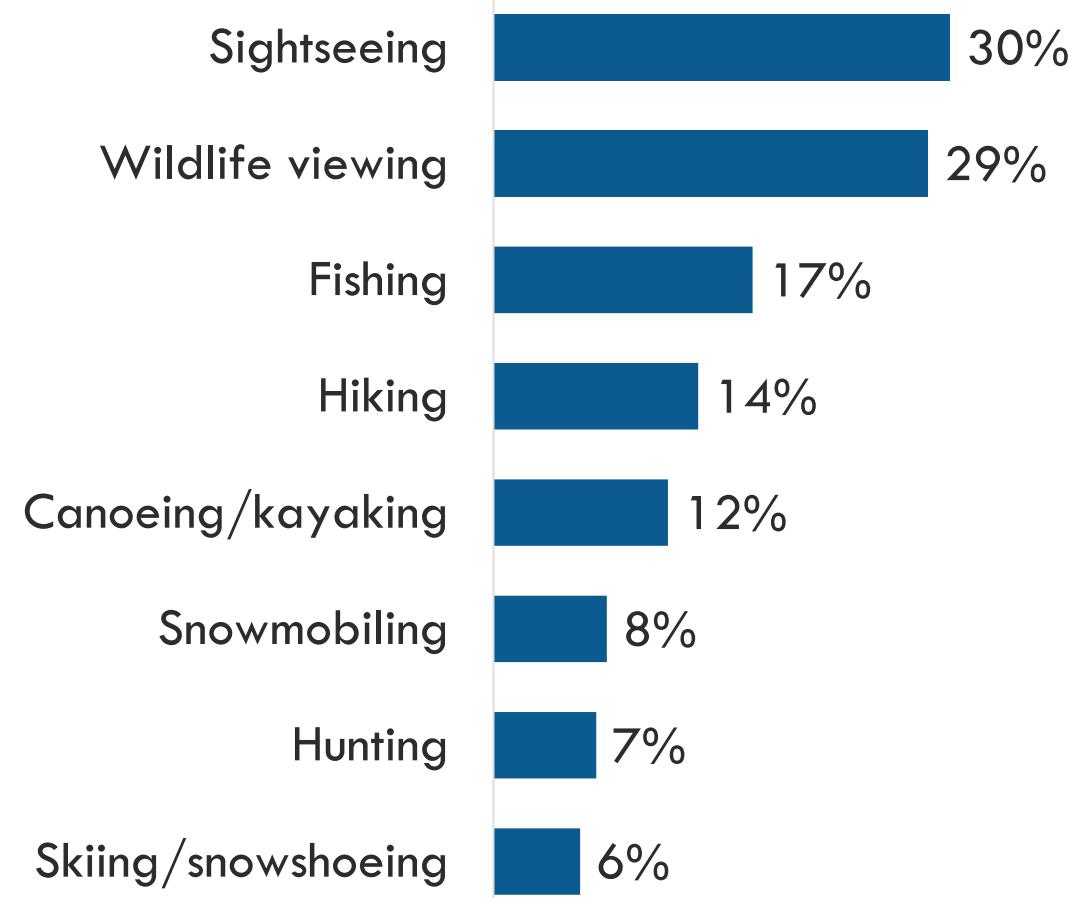
IN-DESTINATION ACTIVITIES – CONTINUED

Detail by Segment

	Total Visitors	Traveler Type				Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International	
Local cuisine	68%	72%	62%	74%	65%	68%	76%	
Wildlife viewing	66%	55%	75%	80%	61%	69%	62%	
Shopping	54%	43%	64%	70%	47%	57%	65%	
Breweries/distilleries	38%	39%	35%	44%	36%	39%	41%	
Museums/galleries	37%	34%	38%	52%	32%	39%	40%	
Photography	37%	37%	35%	47%	38%	35%	40%	
Hiking (day)	36%	40%	30%	39%	35%	36%	43%	
Sightseeing excursions by boat	35%	24%	47%	50%	30%	39%	38%	
Bear viewing	30%	24%	35%	52%	28%	32%	32%	
Cultural activities	21%	11%	32%	21%	17%	23%	25%	
Sightseeing excursions by train	20%	10%	31%	29%	15%	23%	26%	
Birding	20%	17%	22%	40%	20%	21%	24%	
Fishing	20%	20%	17%	34%	19%	21%	9%	
View the Northern Lights	14%	18%	8%	29%	14%	15%	6%	
Glacier trekking	13%	12%	14%	22%	11%	15%	15%	
Sightseeing excursions by plane	13%	9%	16%	29%	11%	14%	12%	
Festivals/events	12%	10%	12%	24%	11%	13%	5%	
Tramway/gondola	12%	5%	19%	11%	11%	12%	16%	
Performing arts/shows	11%	5%	17%	24%	11%	12%	7%	
Mining/gold mining tours	10%	5%	14%	21%	7%	12%	8%	
Canoeing/kayaking	10%	7%	12%	20%	9%	10%	10%	
Bicycle touring	7%	3%	11%	12%	8%	7%	2%	
Dog sledding/kennel tour	7%	8%	5%	15%	5%	9%	2%	
Guided back country tour	7%	3%	9%	22%	7%	7%	8%	
Ice carving contests/ice museums	6%	7%	5%	15%	6%	7%	3%	
ATV-4-wheeling	6%	6%	6%	10%	5%	7%	3%	
Backpacking (overnight)	6%	2%	9%	16%	6%	6%	3%	
Hunting	6%	3%	8%	10%	5%	7%	1%	
Sporting events	6%	3%	8%	13%	5%	7%	2%	
Mountain biking	6%	2%	9%	10%	6%	6%	2%	

Hired Guide

Hired Guide



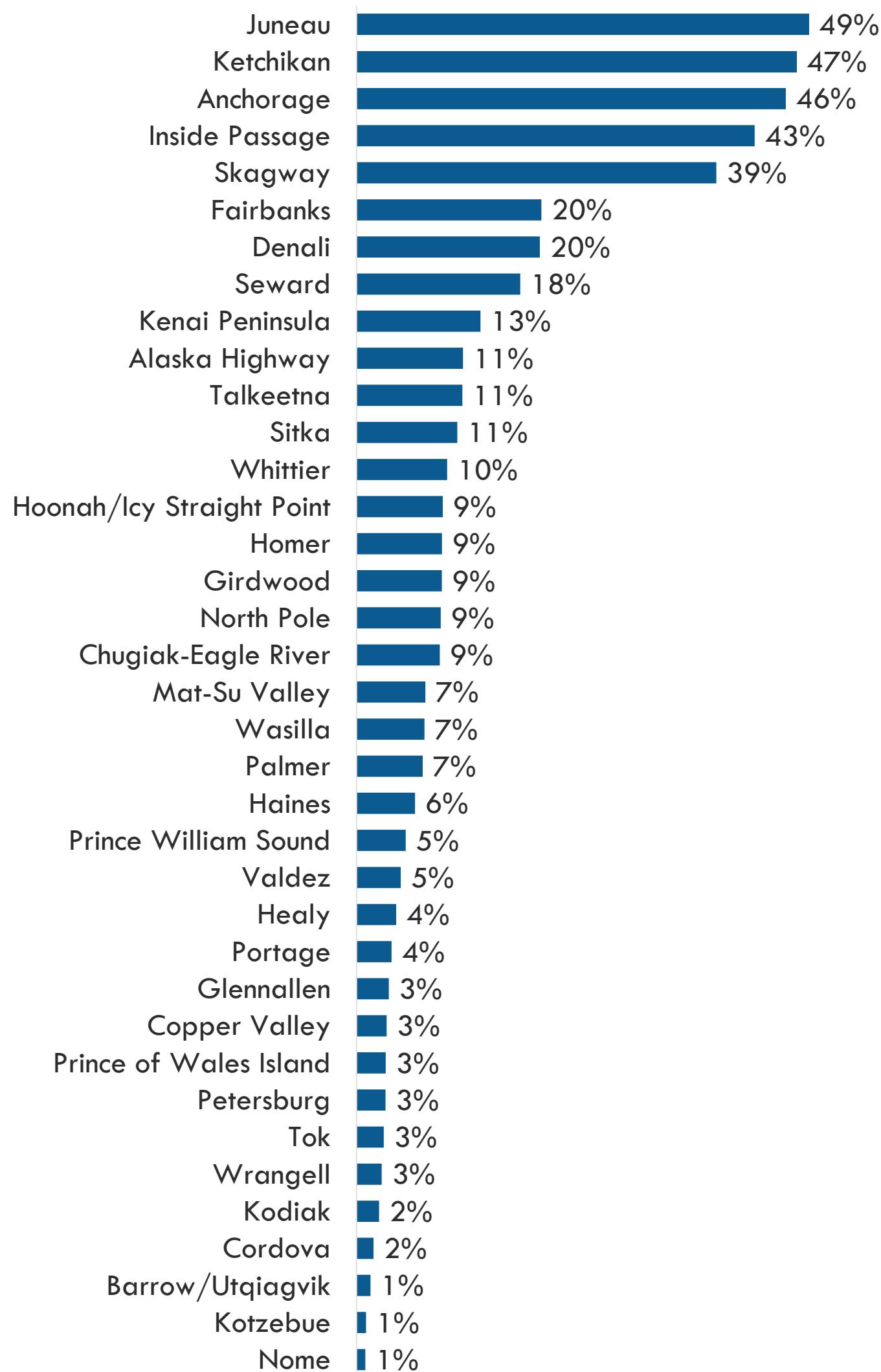
Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Sightseeing	30%	27%	33%	39%	26%	32%	46%
Wildlife viewing	29%	21%	35%	41%	28%	29%	37%
Fishing	17%	17%	16%	31%	16%	19%	7%
Hiking	14%	7%	17%	29%	13%	14%	12%
Canoeing/kayaking	12%	4%	17%	22%	11%	12%	9%
Snowmobiling	8%	4%	9%	19%	7%	8%	1%
Hunting	7%	2%	10%	12%	8%	7%	2%
Skiing/snowshoeing	6%	3%	7%	16%	5%	6%	3%

Question: While in Alaska did you/will you hire a guide for any of the following activities on this trip? Select all that apply. Base: Total, 3,523 respondents.

AREAS VISITED

Areas Visited



Question: What areas have you visited/are you planning to visit on this trip? Select all that apply. Base: Total, 4,119 respondents.

AREAS VISITED – CONTINUED

Detail by Segment

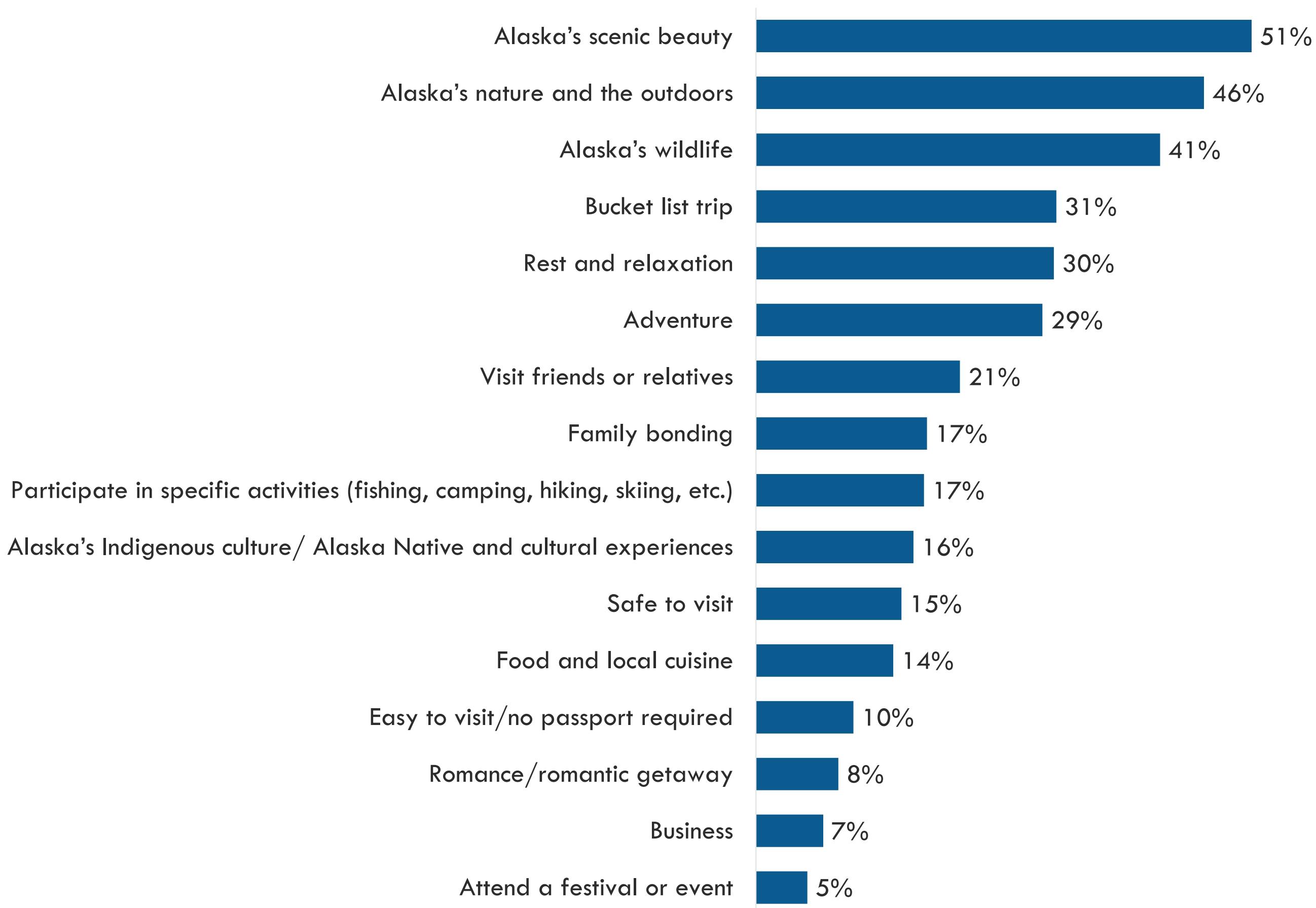
	Total Visitors	Traveler Type				Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International	
Juneau	49%	7%	100%	12%	42%	52%	62%	
Ketchikan	47%	4%	100%	11%	41%	50%	61%	
Anchorage	46%	65%	23%	56%	49%	44%	57%	
Inside Passage	43%	5%	88%	17%	37%	46%	48%	
Skagway	39%	4%	81%	13%	34%	41%	50%	
Fairbanks	20%	28%	8%	45%	17%	21%	25%	
Denali	20%	25%	12%	38%	14%	22%	29%	
Seward	18%	24%	10%	23%	15%	19%	28%	
Kenai Peninsula	13%	20%	4%	27%	11%	15%	16%	
Alaska Highway	11%	16%	4%	33%	8%	14%	10%	
Talkeetna	11%	14%	7%	24%	8%	13%	15%	
Sitka	11%	2%	21%	5%	9%	11%	19%	
Whittier	10%	11%	8%	18%	7%	11%	13%	
Hoonah/Icy Straight Point	9%	0%	19%	9%	9%	9%	11%	
Homer	9%	15%	2%	18%	8%	10%	9%	
Girdwood	9%	15%	2%	11%	7%	11%	7%	
North Pole	9%	13%	2%	24%	7%	10%	8%	
Chugiak-Eagle River	9%	14%	3%	18%	7%	10%	8%	
Mat-Su Valley	7%	12%	2%	13%	7%	8%	9%	
Wasilla	7%	11%	2%	12%	6%	8%	6%	
Palmer	7%	12%	2%	10%	6%	8%	5%	
Haines	6%	3%	10%	7%	5%	7%	10%	
Prince William Sound	5%	6%	2%	21%	4%	6%	5%	
Valdez	5%	6%	2%	14%	4%	5%	8%	
Healy	4%	6%	2%	9%	3%	5%	4%	
Portage	4%	5%	1%	9%	3%	4%	4%	
Glennallen	3%	5%	1%	10%	3%	4%	5%	
Copper Valley	3%	4%	1%	13%	2%	4%	3%	
Prince of Wales Island	3%	1%	5%	10%	2%	4%	1%	
Petersburg	3%	1%	5%	11%	3%	4%	1%	
Tok	3%	4%	1%	8%	2%	3%	7%	
Wrangell	3%	3%	2%	8%	2%	3%	5%	
Kodiak	2%	3%	1%	13%	3%	2%	0%	
Cordova	2%	2%	1%	10%	2%	2%	1%	
Barrow/Utqiagvik	1%	2%	1%	8%	1%	2%	1%	
Kotzebue	1%	1%	1%	5%	1%	1%	1%	
Nome	1%	1%	1%	3%	1%	1%	2%	



VISITOR EXPERIENCE

DESTINATION SELECTION FACTORS

Destination Selection Factors



Question: What were the most important motivators for visiting Alaska on this trip? Select all that apply. Base: Total, 4,117 respondents.

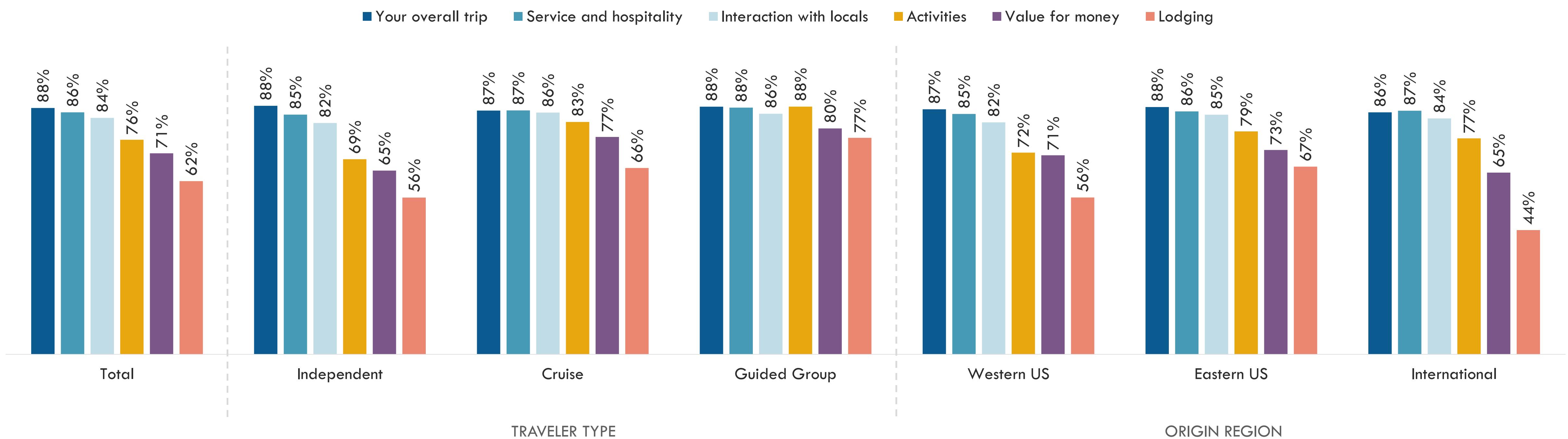
DESTINATION SELECTION FACTORS – CONTINUED

Detail by Segment

	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Alaska's scenic beauty	51%	44%	56%	62%	43%	55%	61%
Alaska's nature and the outdoors	46%	41%	49%	60%	39%	49%	58%
Alaska's wildlife	41%	37%	44%	55%	36%	44%	48%
Bucket list trip	31%	27%	34%	35%	24%	35%	34%
Rest and relaxation	30%	23%	38%	34%	29%	31%	35%
Adventure	29%	30%	27%	42%	27%	30%	41%
Visit friends or relatives	21%	31%	11%	13%	25%	19%	10%
Family bonding	17%	16%	20%	13%	16%	19%	11%
Participate in specific activities (fishing, camping, hiking, skiing, etc.)	17%	19%	13%	29%	18%	17%	12%
Alaska's Indigenous culture/ Alaska Native and cultural experiences	16%	10%	22%	22%	13%	18%	12%
Safe to visit	15%	11%	19%	18%	14%	16%	13%
Food and local cuisine	14%	10%	18%	21%	12%	16%	8%
Easy to visit/no passport required	10%	7%	13%	12%	10%	11%	1%
Romance/romantic getaway	8%	5%	11%	15%	8%	9%	9%
Business	7%	13%	1%	2%	8%	6%	7%
Attend a festival or event	5%	4%	6%	11%	5%	6%	1%

SATISFACTION RATING

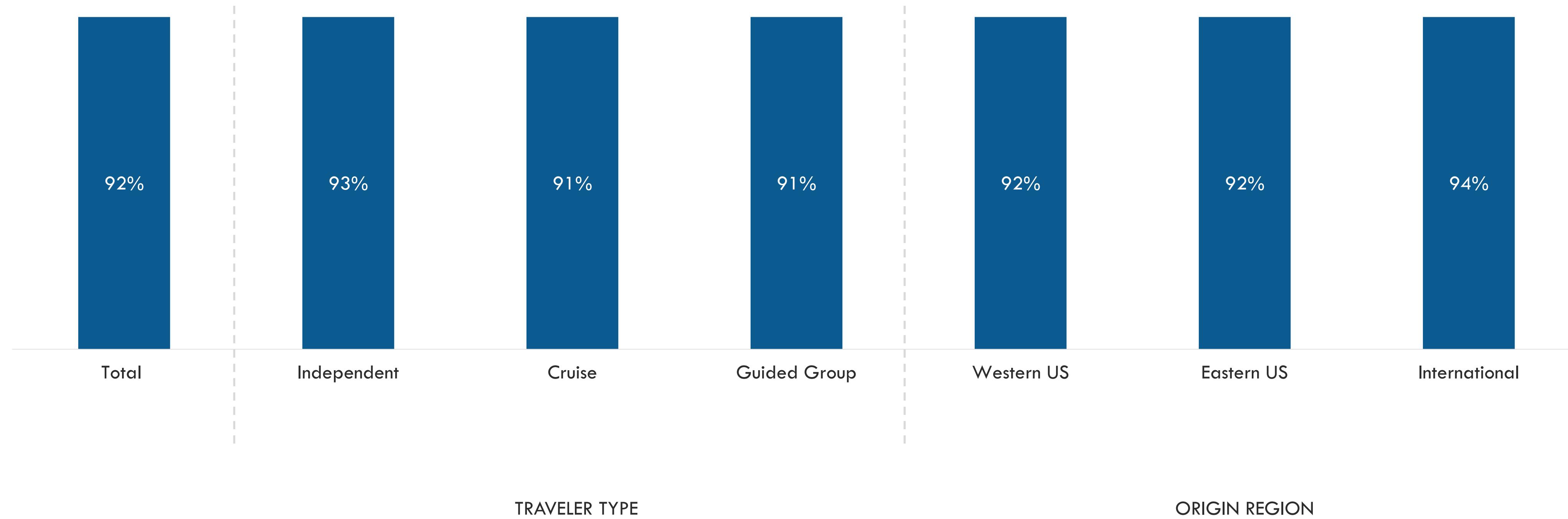
Satisfaction Rating



Question: How satisfied are you with... Base: Total, 4,117 respondents.

LIKELIHOOD TO RECOMMEND

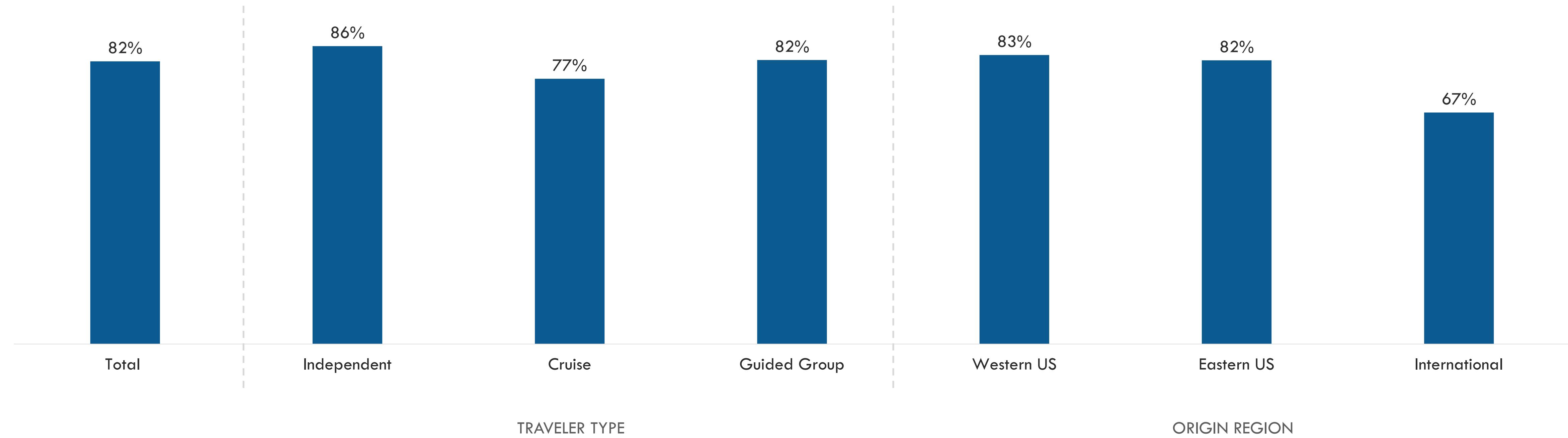
Likelihood to Recommend



Question: How likely are you to...? Base: Total, 4,117 respondents.

LIKELIHOOD TO RETURN

Likelihood to Return

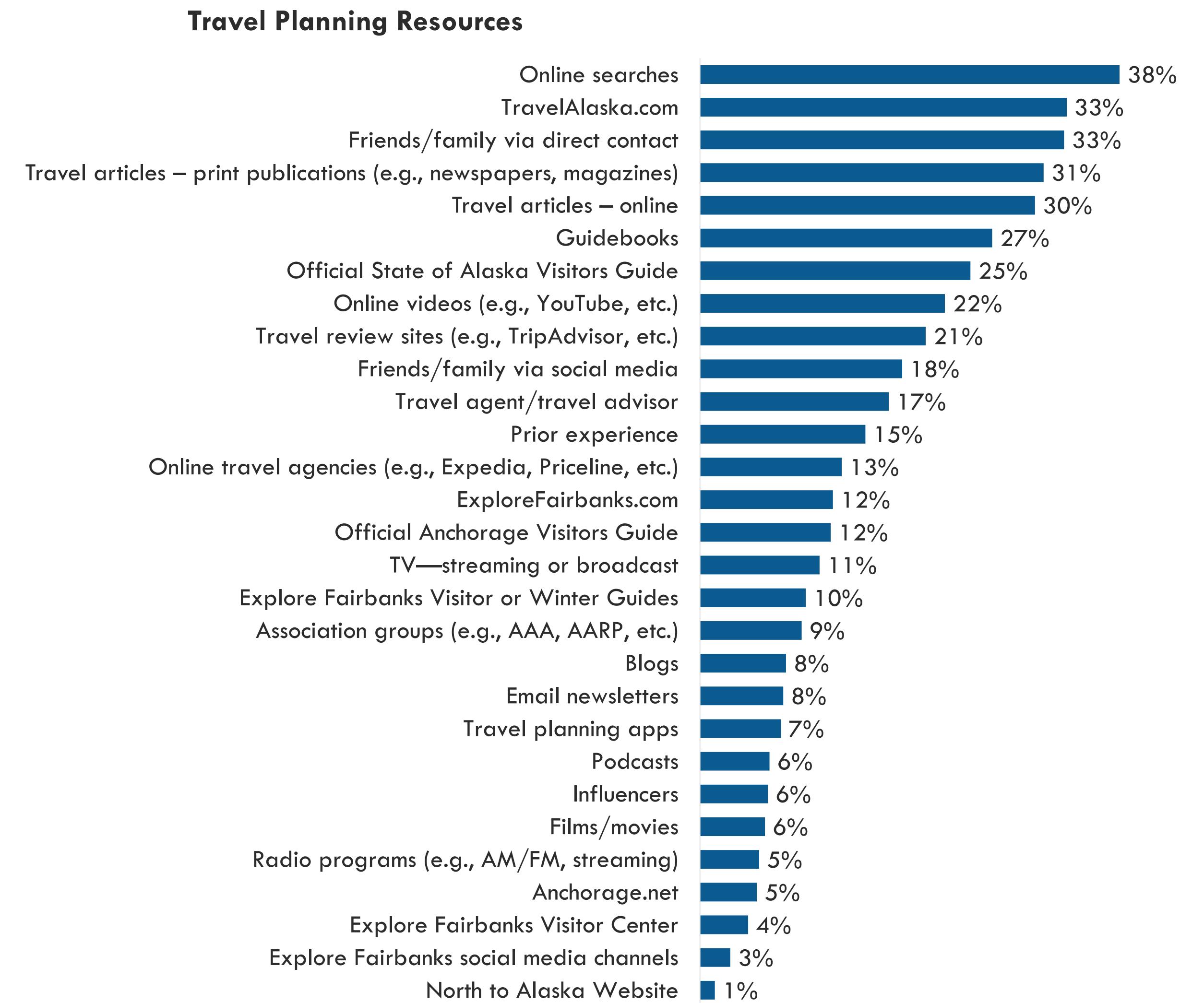


Question: How likely are you to...? Base: Total, 4,117 respondents.



TRAVEL PLANNING & MEDIA

TRAVEL PLANNING RESOURCES



Question: Which of the following sources did you use to plan your trip to Alaska? Select all that apply. Base: Total, 1,869 respondents.

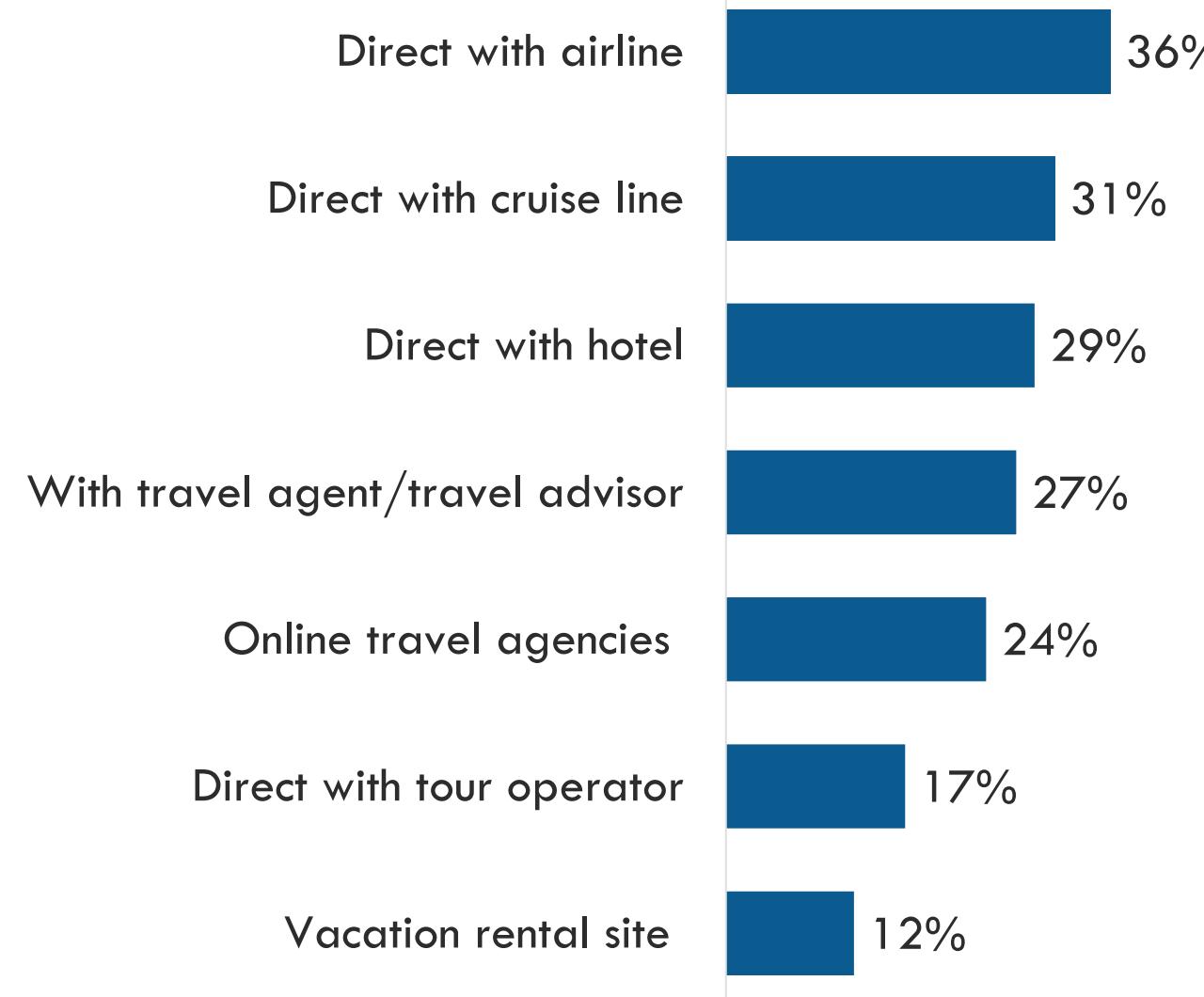
TRAVEL PLANNING RESOURCES – CONTINUED

Detail by Segment

	Total	Traveler Type				Origin Region	
	Total Visitors	Independent	Cruise	Guided Group	Western US	Eastern US	International
Online searches	38%	52%	32%	37%	33%	41%	37%
TravelAlaska.com	33%	52%	24%	37%	29%	35%	44%
Friends/family via direct contact	33%	44%	28%	31%	34%	33%	27%
Travel articles – print publications	31%	39%	27%	38%	29%	32%	27%
Travel articles – online	30%	40%	25%	35%	26%	32%	53%
Guidebooks	27%	36%	22%	33%	23%	28%	38%
Official State of Alaska Visitors Guide	25%	42%	16%	23%	19%	26%	37%
Online videos (e.g., YouTube, etc.)	22%	18%	25%	19%	19%	24%	21%
Travel review sites (e.g., TripAdvisor, etc.)	21%	27%	18%	17%	18%	22%	17%
Friends/family via social media	18%	13%	22%	11%	24%	16%	3%
Travel agent/travel advisor	17%	7%	22%	23%	12%	19%	13%
Prior experience	15%	20%	13%	12%	17%	14%	14%
Online travel agencies (e.g., Expedia, Priceline)	13%	12%	13%	13%	13%	13%	15%
ExploreFairbanks.com	12%	23%	6%	18%	11%	13%	5%
Official Anchorage Visitors Guide	12%	24%	6%	10%	10%	13%	14%
TV—streaming or broadcast	11%	5%	14%	8%	10%	11%	6%
Explore Fairbanks Visitor or Winter Guides	10%	18%	5%	14%	7%	11%	9%
Association groups (e.g., AAA, AARP, etc.)	9%	10%	9%	10%	9%	10%	4%
Blogs	8%	8%	8%	4%	7%	8%	8%
Email newsletters	8%	8%	7%	6%	7%	8%	4%
Travel planning apps	7%	7%	8%	6%	8%	7%	3%
Podcasts	6%	2%	9%	2%	5%	7%	0%
Influencers	6%	3%	8%	3%	5%	7%	0%
Films/movies	6%	3%	8%	2%	6%	6%	2%
Radio programs (e.g., AM/FM, streaming)	5%	1%	8%	3%	7%	5%	0%
Anchorage.net	5%	9%	4%	3%	4%	6%	11%
Explore Fairbanks Visitor Center	4%	10%	2%	3%	3%	5%	4%
Explore Fairbanks social media channels	3%	4%	2%	2%	2%	3%	5%
North to Alaska Website	1%	1%	1%	1%	1%	1%	4%

BOOKING SOURCES

Booking Sources

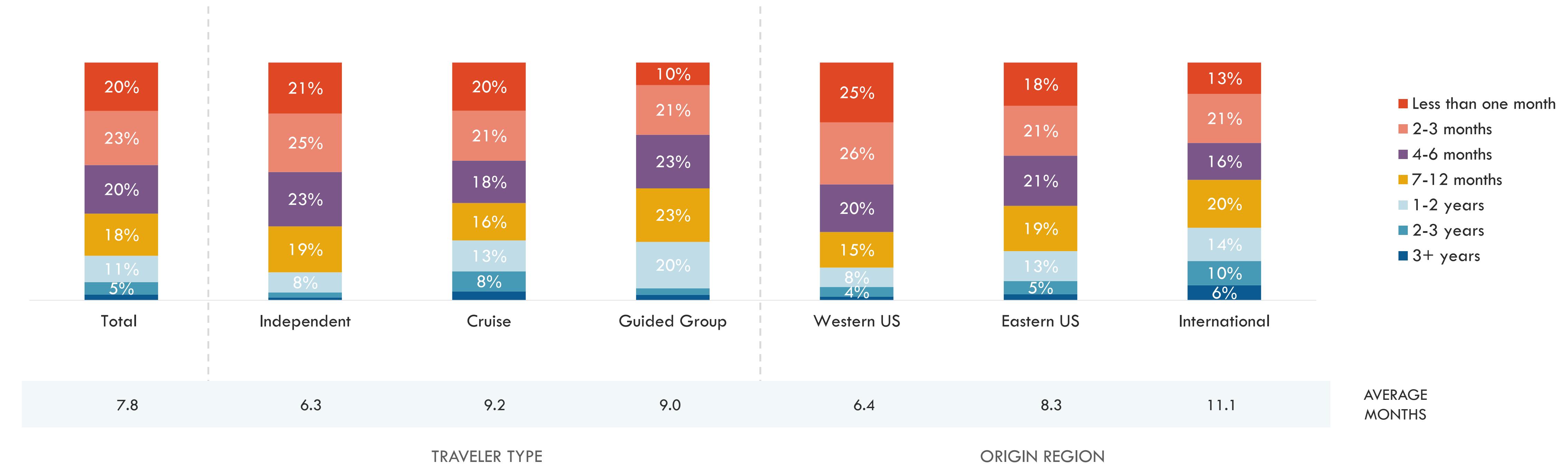


	Total	Traveler Type				Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International	
Direct with airline	36%	62%	22%	37%	34%	37%	20%	
Direct with cruise line	31%	4%	46%	17%	28%	32%	19%	
Direct with hotel	29%	40%	23%	32%	29%	29%	22%	
With travel agent/travel advisor	27%	10%	36%	29%	24%	28%	31%	
Online travel agencies (e.g., Expedia, Priceline, etc.)	24%	24%	23%	38%	27%	23%	25%	
Direct with tour operator	17%	22%	12%	34%	15%	17%	25%	
Vacation rental site (e.g., Airbnb, VRBO, etc.)	12%	26%	5%	12%	10%	13%	9%	

Question: Which of the following sources did you use to book your trip to Alaska? Select all that apply. Base: Total, 2,217 respondents.

PLANNING WINDOW

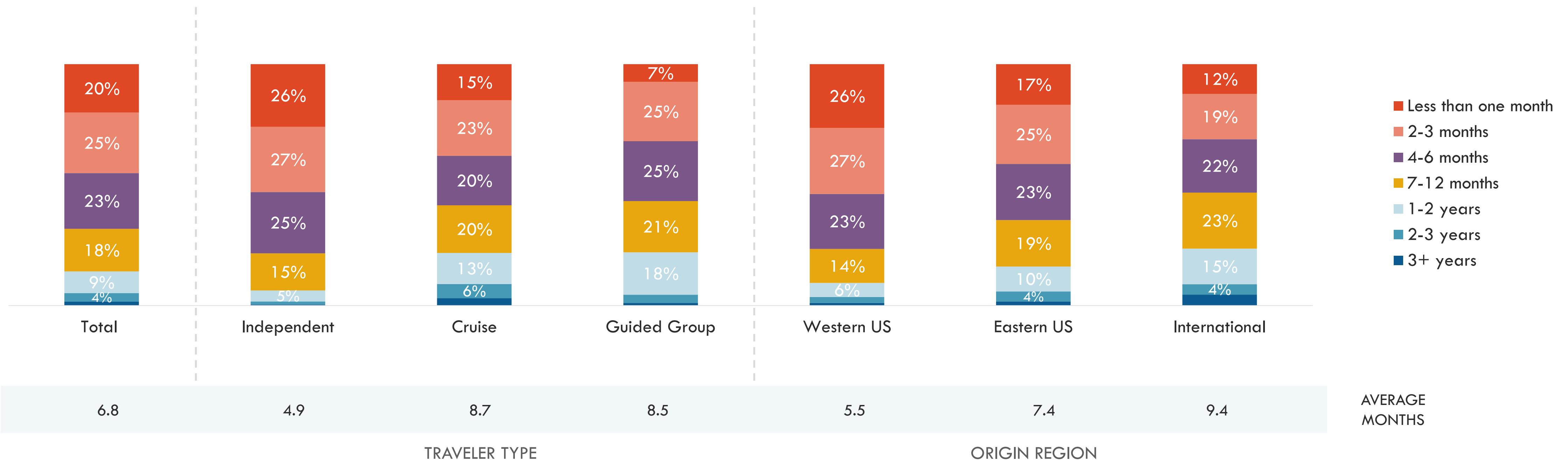
Planning Window



Question: How many months in advance did you begin planning and booking this trip to Alaska? Base: Total, 3,354 respondents.

BOOKING WINDOW

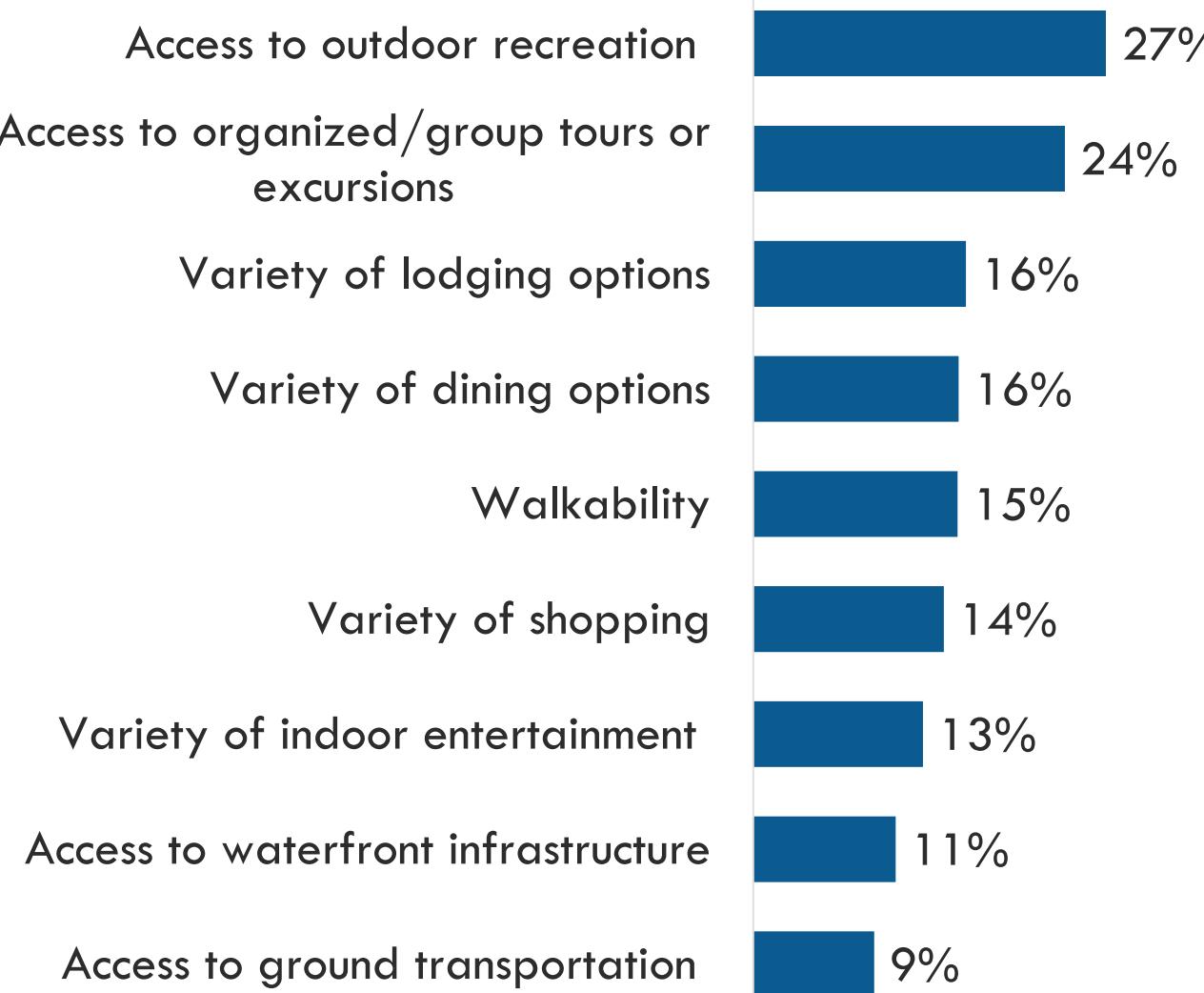
Booking Window



Question: How many months in advance did you begin planning and booking this trip to Alaska? Base: Total, 3,223 respondents.

CITY/COMMUNITY SELECTION FACTORS

City/Community Selection Factors



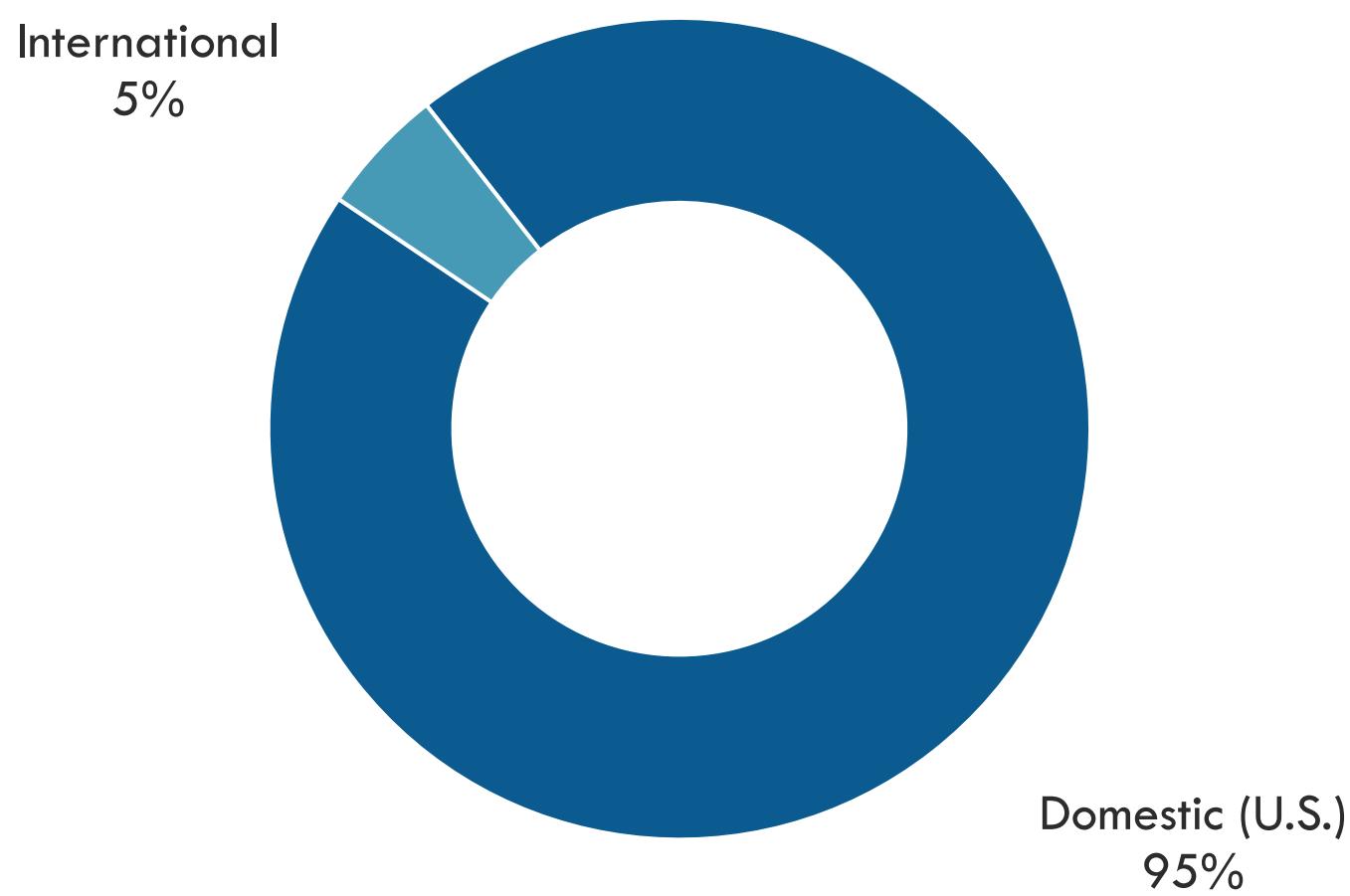
	Total Visitors	Traveler Type				Origin Region	
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Access to outdoor recreation (e.g., hiking, camping, etc.)	27%	22%	31%	38%	22%	31%	10%
Access to organized/group tours or excursions	24%	10%	38%	33%	19%	28%	6%
Variety of lodging options	16%	15%	15%	30%	13%	19%	4%
Variety of dining options	16%	10%	22%	17%	13%	18%	3%
Walkability	15%	8%	24%	14%	13%	18%	10%
Variety of shopping	14%	5%	25%	17%	13%	16%	6%
Variety of indoor entertainment (e.g., museums, movie theaters, etc.)	13%	6%	20%	16%	12%	14%	4%
Access to waterfront infrastructure (e.g., harbors, boat ramps, etc.)	11%	6%	16%	12%	9%	13%	2%
Access to ground transportation (e.g., taxis, ride share, etc.)	9%	6%	13%	12%	8%	10%	4%

Question: When choosing which cities/communities to visit on this trip in Alaska, what were the top three amenities that influenced your decision on where to visit? Base: Total, 4,256 respondents.

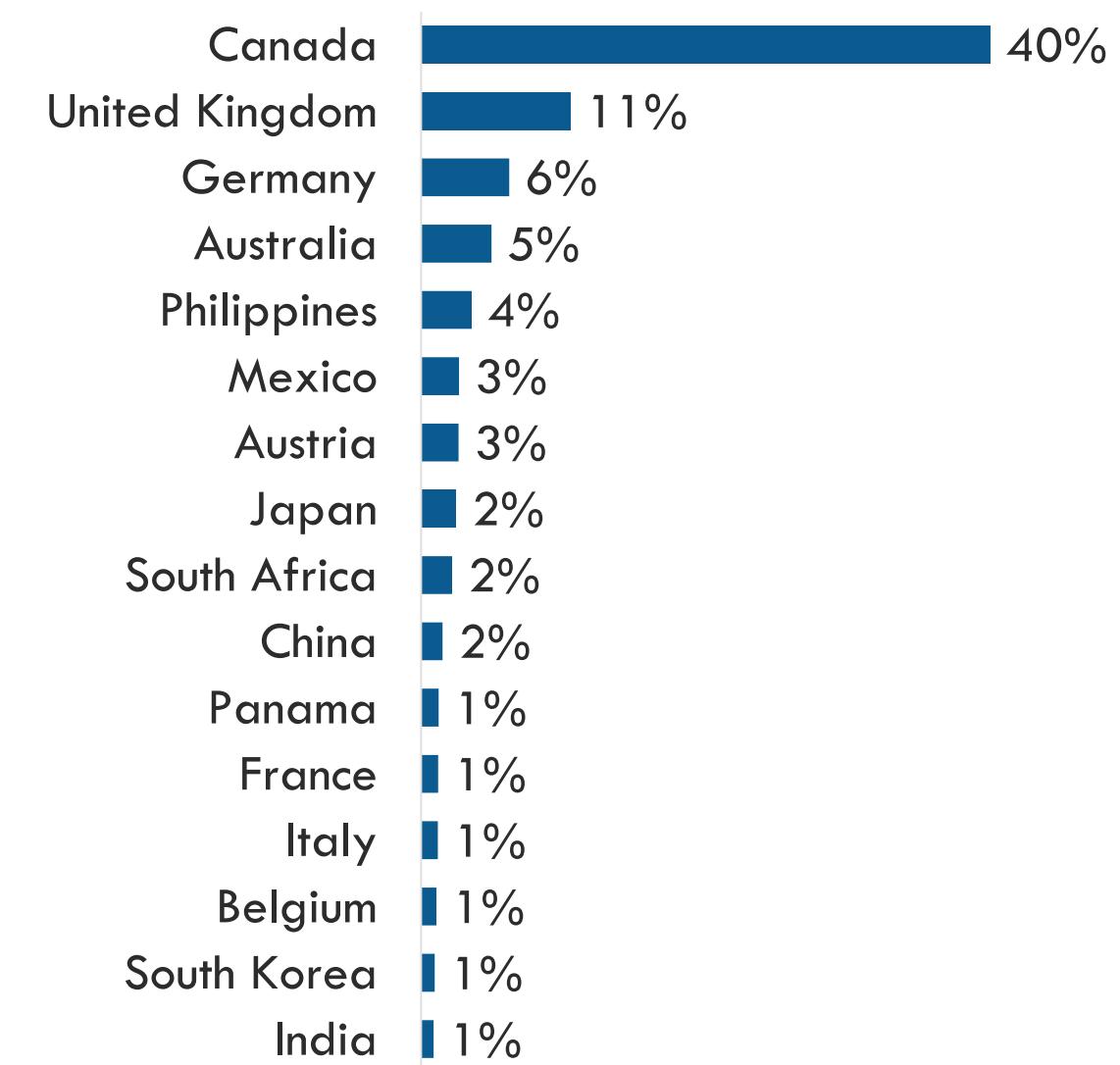
MARKETS & DEMOGRAPHICS

ORIGIN COUNTRIES

Domestic vs International Visitors

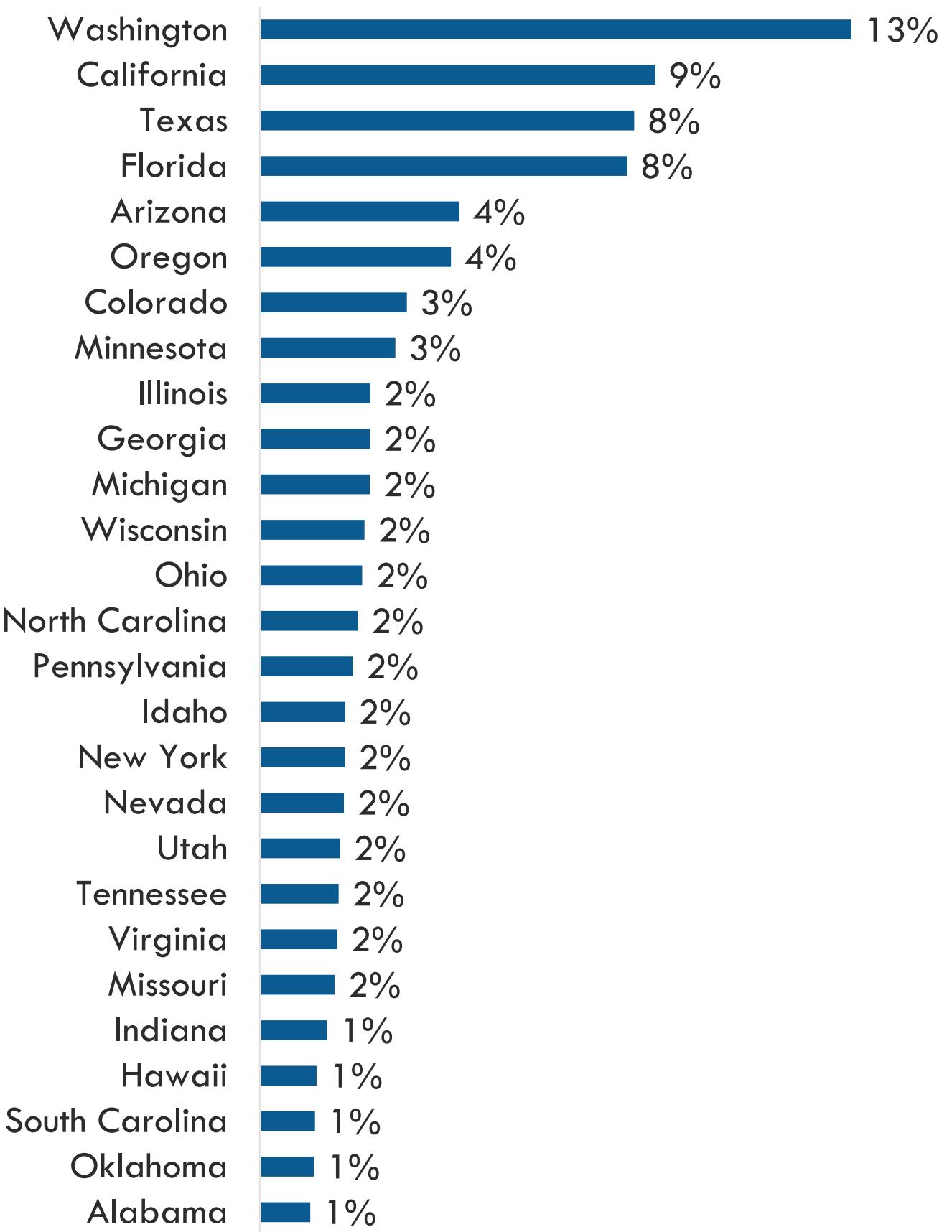


Top Countries of Origin



ORIGIN STATES

Top U.S. States

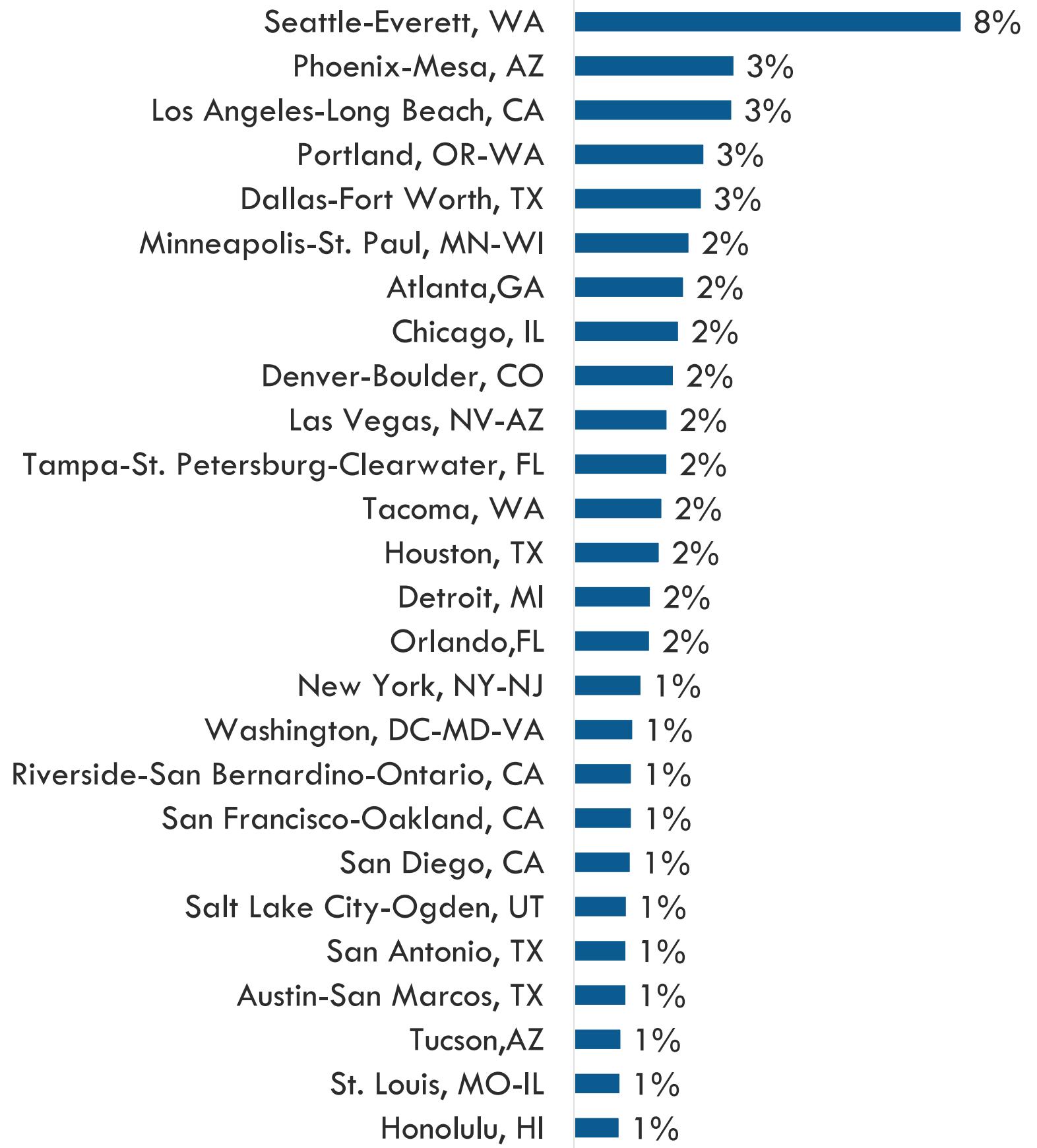


Detail by Segment

	Total	Traveler Type			
		U.S. Visitors	Independent	Cruise	Guided Group
Washington	13%	13%	17%	8%	6%
California	9%	9%	7%	11%	12%
Texas	8%	8%	8%	9%	7%
Florida	8%	8%	6%	11%	7%
Arizona	4%	4%	4%	5%	2%
Oregon	4%	4%	6%	2%	1%
Colorado	3%	3%	3%	3%	4%
Minnesota	3%	3%	4%	2%	1%
Illinois	2%	2%	1%	3%	9%
Georgia	2%	2%	2%	3%	0%
Michigan	2%	2%	2%	3%	2%
Wisconsin	2%	2%	2%	2%	4%
Ohio	2%	2%	2%	2%	3%
North Carolina	2%	2%	2%	3%	4%
Pennsylvania	2%	2%	2%	2%	4%
Idaho	2%	2%	2%	1%	1%
New York	2%	2%	1%	3%	3%
Nevada	2%	2%	2%	2%	1%
Utah	2%	2%	2%	2%	1%
Tennessee	2%	2%	2%	2%	2%
Virginia	2%	2%	1%	2%	2%
Missouri	2%	2%	2%	2%	2%
Indiana	1%	1%	2%	1%	1%
Hawaii	1%	1%	2%	1%	2%
South Carolina	1%	1%	1%	1%	1%
Oklahoma	1%	1%	1%	1%	1%
Alabama	1%	1%	1%	1%	1%

ORIGIN MARKETS

Top U.S. Markets



Detail by Segment

	Total	Traveler Type			
		U.S. Visitors	Independent	Cruise	Guided Group
Seattle-Everett, WA	8%	11%	4%	3%	3%
Phoenix-Mesa, AZ	3%	3%	4%	0%	0%
Los Angeles-Long Beach, CA	3%	3%	3%	6%	0%
Portland, OR-WA	3%	4%	1%	0%	2%
Dallas-Fort Worth, TX	3%	2%	3%	1%	1%
Minneapolis-St. Paul, MN-WI	2%	3%	1%	0%	0%
Atlanta, GA	2%	2%	3%	0%	8%
Chicago, IL	2%	1%	3%	2%	3%
Denver-Boulder, CO	2%	2%	2%	0%	1%
Las Vegas, NV-AZ	2%	2%	2%	1%	1%
Tampa-St. Petersburg-Clearwater, FL	2%	2%	2%	1%	1%
Tacoma, WA	2%	2%	1%	2%	3%
Houston, TX	2%	2%	2%	2%	2%
Detroit, MI	2%	2%	2%	2%	1%
Orlando, FL	2%	1%	2%	2%	2%
New York, NY-NJ	1%	1%	2%	2%	2%
Washington, DC-MD-VA	1%	2%	2%	1%	1%
Riverside-San Bernardino-Ontario, CA	1%	1%	2%	2%	2%
San Francisco-Oakland, CA	1%	1%	1%	3%	1%
San Diego, CA	1%	1%	1%	1%	1%
Salt Lake City-Ogden, UT	1%	1%	1%	1%	3%
San Antonio, TX	1%	1%	1%	1%	1%
Austin-San Marcos, TX	1%	1%	0%	1%	1%
Tucson, AZ	1%	1%	1%	1%	2%
St. Louis, MO-IL	1%	1%	1%	1%	1%
Honolulu, HI	1%	1%	0%	1%	1%

Demographics

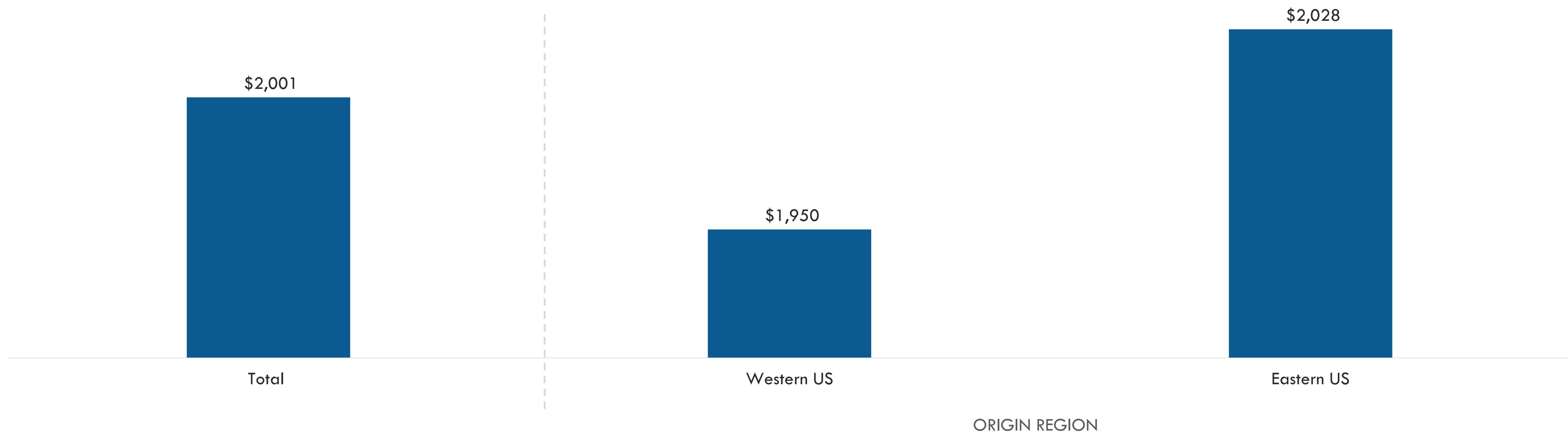
	Total Visitors	Traveler Type			Origin Region		
		Independent	Cruise	Guided Group	Western US	Eastern US	International
Gender							
Female	44%	43%	45%	42%	41%	45%	52%
Male	56%	56%	55%	58%	59%	55%	48%
Age							
Boomers or Older	38%	35%	43%	32%	33%	41%	43%
Gen X	24%	28%	20%	22%	25%	24%	18%
Millennial	33%	31%	35%	42%	37%	31%	33%
Gen Z	4%	6%	2%	4%	5%	4%	5%
Mean	48.4	47.4	49.8	46.4	46.9	49.4	48.5
Ethnicity							
White/Caucasian	80%	75%	87%	81%	77%	84%	67%
Black/African American	6%	8%	4%	9%	6%	6%	5%
Latino/Hispanic	5%	6%	4%	10%	6%	5%	8%
Asian/Pacific Islander	5%	7%	3%	4%	8%	3%	15%
Native American/Indigenous	3%	4%	2%	2%	3%	3%	2%
Other	1%	3%	0%	0%	2%	1%	2%
Marital Status							
Married/partnered	72%	63%	82%	78%	69%	74%	69%
Single	17%	21%	12%	16%	18%	15%	26%
Children in Household							
Under 18	33%	27%	38%	46%	36%	33%	22%
Education							
College Graduate	63%	60%	66%	67%	64%	63%	65%
Household Income							
More than \$150,000	28%	31%	24%	28%	31%	27%	21%
\$100,000 to \$149,999	32%	28%	36%	33%	32%	33%	16%
\$50,000 to \$99,999	30%	29%	32%	27%	29%	31%	33%
Less than \$50,000	10%	12%	8%	12%	9%	9%	30%
Mean	\$117,664	\$118,887	\$116,481	\$117,393	\$121,049	\$117,827	\$89,323
Employment							
Employed full-time	57%	57%	57%	58%	60%	56%	50%
Retired	28%	24%	34%	26%	25%	31%	29%
Orientation							
LGBTQ+	7%	9%	5%	7%	9%	7%	7%
Accessibility							
Accessibility needs in travel party	16%	11%	20%	18%	15%	16%	12%



APPENDIX: CRUISE VISITORS

CRUISE TICKET COST

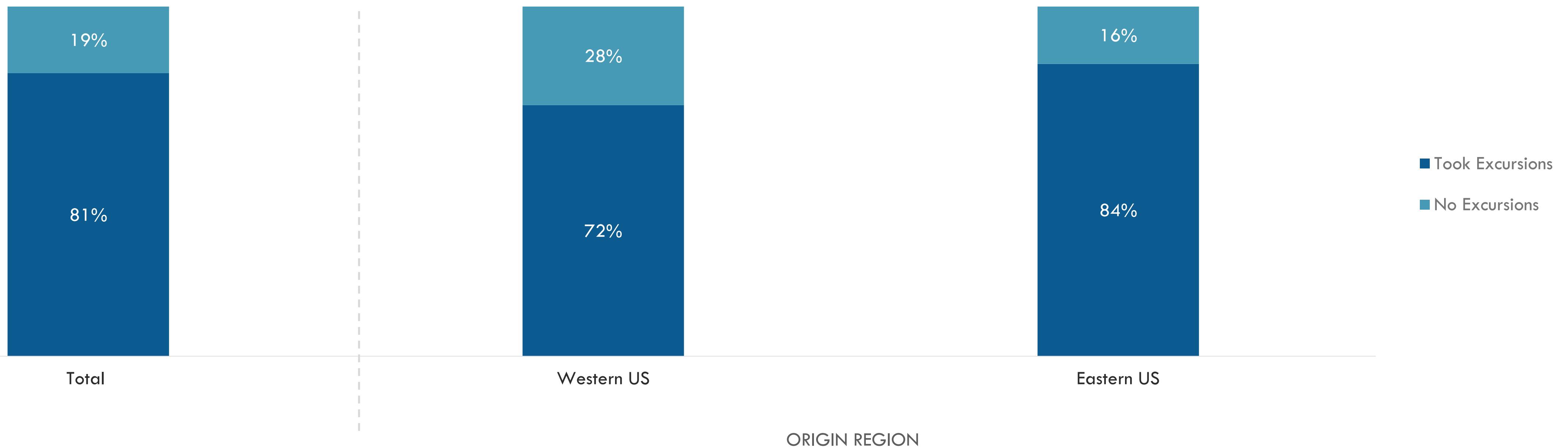
Cruise Cost Per Person



Question: Before arriving in Alaska, how much did you spend on cruise tickets per person? Exclude taxes and airfare. Base: Cruise visitors, 1,525 respondents.

EXCURSIONS

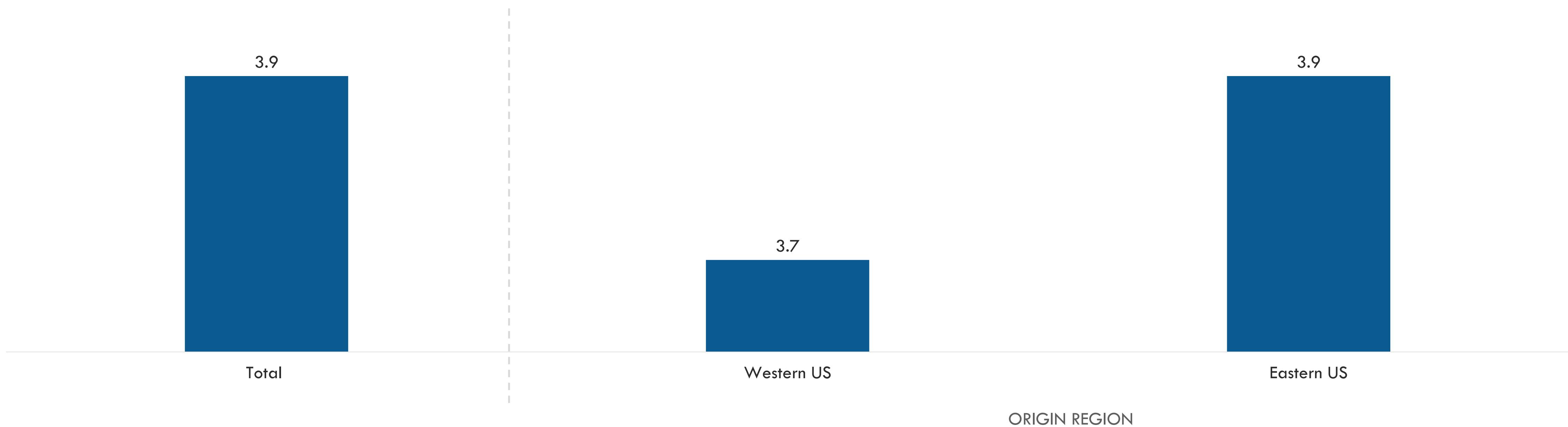
Excursions



Question: While on your cruise, have you gone/will you be going on shore to visit towns, villages, or attractions, or do a paid excursion? Select one. Base: Cruise visitors, 1,579 respondents.

CRUISE SHORE DAYS

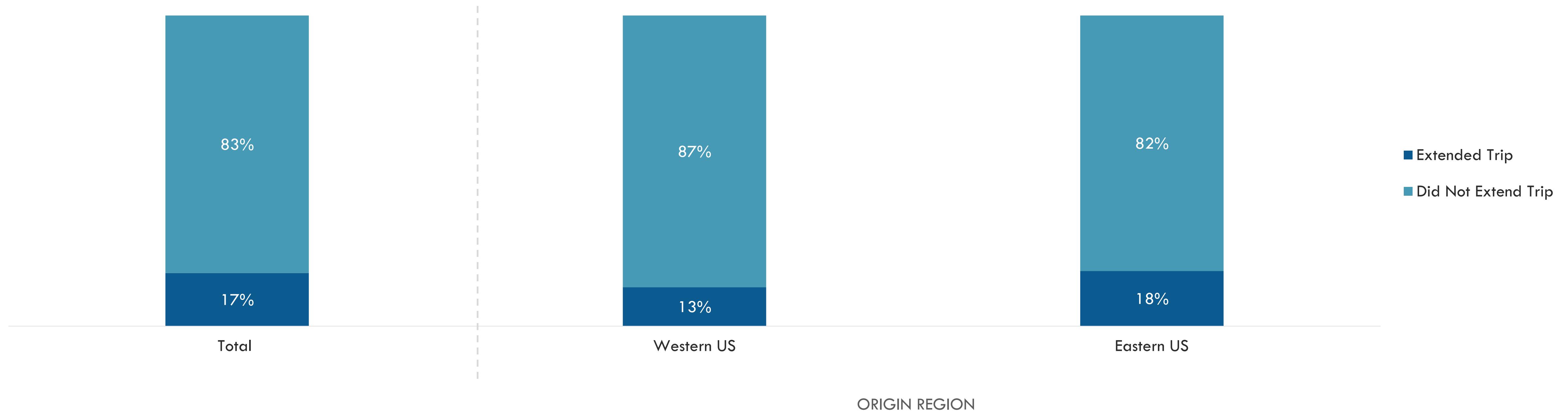
Cruise Shore Days



Question: How many total days will you spend on shore during your cruise? Base: Cruise visitors, 1,284 respondents.

PRE/POST CRUISE STAY

Pre/Post Cruise Stay



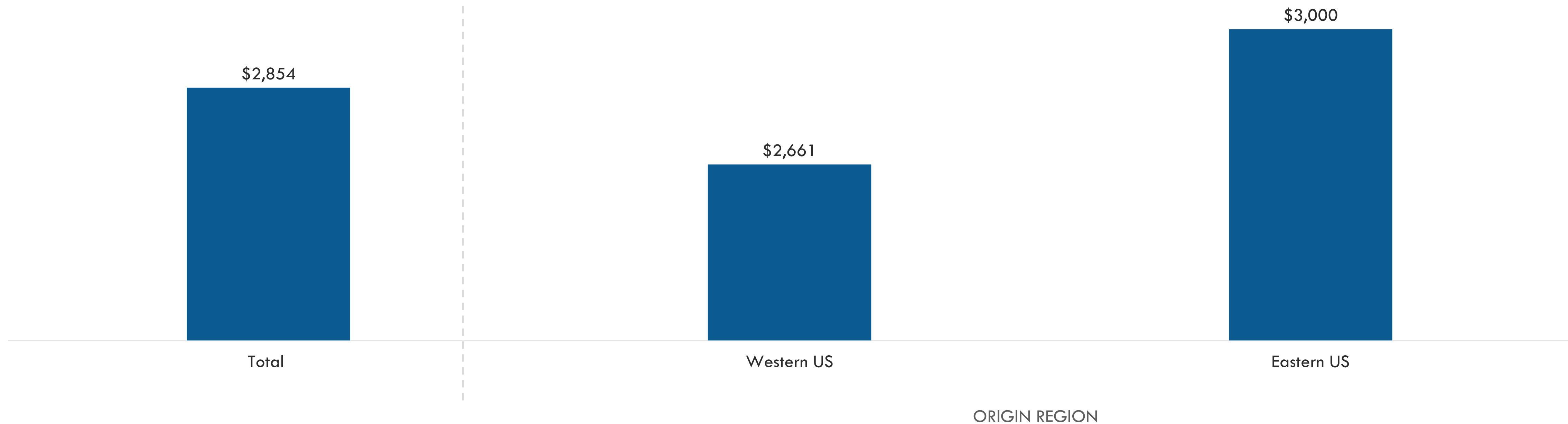
Question: Will you be spending any time in Alaska before or after your cruise? Base: Cruise visitors, 1,568 respondents.

A photograph of a couple from behind, hugging and looking out over a vast landscape. They are standing on a gravel path next to a wooden railing with chain links. In front of them is a large, light-colored rock. The background features a dense forest of green trees and a range of majestic, snow-capped mountains under a cloudy sky.

APPENDIX: GUIDED GROUP VISITOR

GUIDED GROUP COST

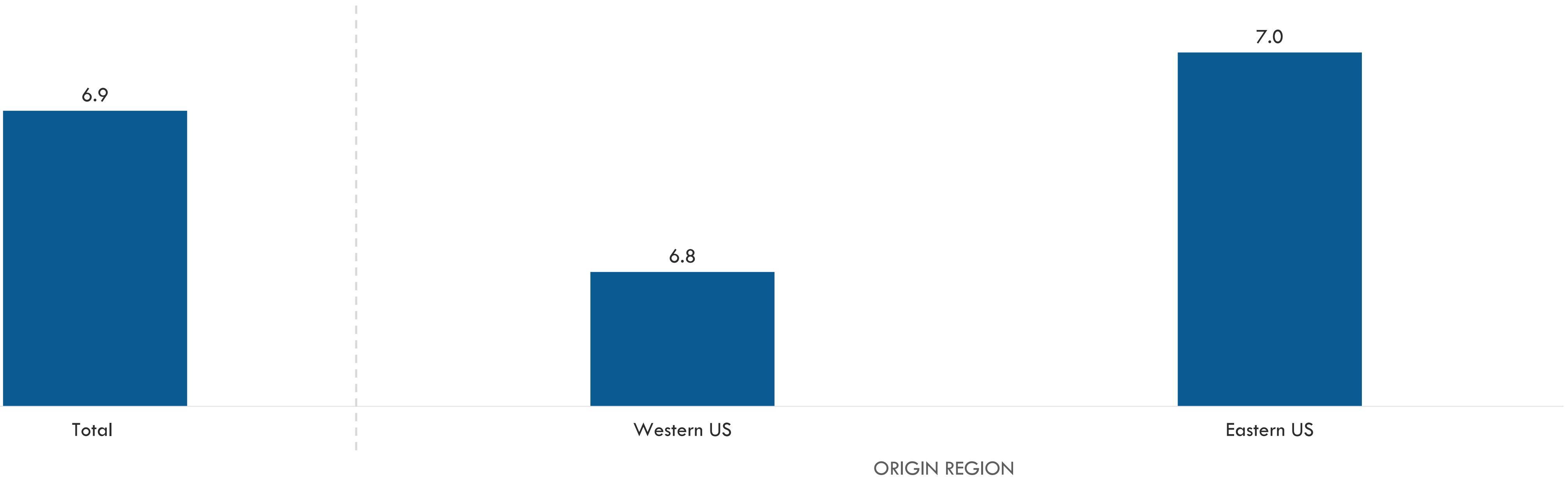
Guided Group Cost



Question: Before arriving in Alaska, how much did you spend on your guided group tour? Exclude taxes and airfare. Base: Guided group visitors, 186 respondents.

GUIDED GROUP DAYS

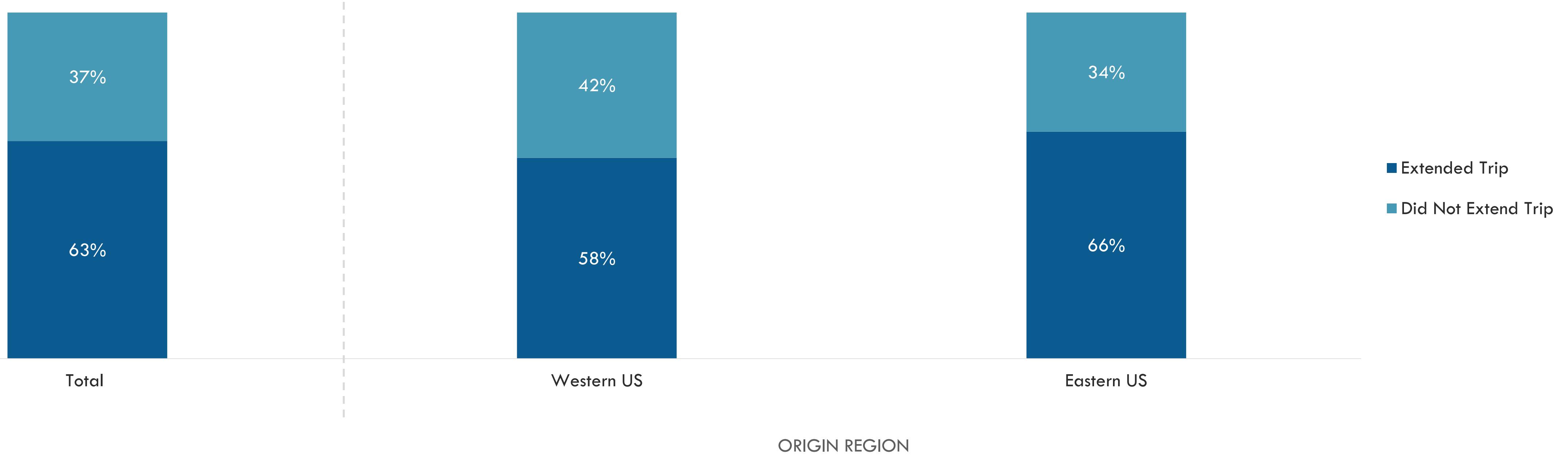
Guided Group Days



Question: During your guided group tour, how many total days will you spend in Alaska? Base: Guided group visitors, 252 respondents.

PRE/POST GUIDED GROUP STAY

Pre/Post Guided Group Stay



Question: Will you be spending any time in Alaska before or after your guided group tour? Base: Guided group visitors, 254 respondents.