

Chapter Three

The Audience



South Denali Visitor Center Complex: Interpretive Master Plan



Denali View North Viewpoint. June, 2008

The Audience

The South Denali Visitor Center Complex will serve two primary audiences: out-of state visitors and Alaska residents. Each of these audiences has different needs and expectations which make specific demands on facility design as well as staffing and operation of the facility. This chapter examines data for the various target markets within these categories and proposes ways to best meet the needs and expectations of these markets.

Out-of-State Visitors

The Alaska Visitor Statistics Program V: Summer 2008 report and Fall/Winter 2007-08 report provides the following key findings:

- From May 1 to September 30, 2008, Alaska received 1,707,400 out-of-state visitors. 87% of Alaska visitors come between May 1 and September 30.
- From October 1, 2007 to April 30, 2008, Alaska received 247,400 out-of-state visitors (13% of total).
- Summer trip purposes were 1,400,100 vacation/pleasure; 153,700 visiting friends/family; 85,400 business; 68,300 business/pleasure.
- Fall/winter trip purposes were 104,700 visiting friends/family;

96,500 business; 29,400 vacation/pleasure; 16,800 business/pleasure.

- Cruise ship market share was 1,033,100, 61% of total visitors. Approximately 200,000 exited Alaska by other modes. Cruise lines operate only in the summer.
- Summer visitation has been relatively stable for the past four years with slight increases from 2005-2007 (1,632,000 '05 to 1,714,100 '07) and a slight decrease in 2008 (1,707,400) attributed to higher fuel prices and the economy.
- The greatest growth in Alaska tourism has been through the cruise industry, with steady growth from 690,600 in 2001 to 1,033,100 in 2008.

Data from the AVSP Summer 2006 report includes profile data not included in the more recent reports:

- Ages of Alaska visitors were <18 6%; 18-24 3%; 25-34 7%; 35-44 10%; 45-54 22%; 55-64 28%; 65+ 23%. The average age was 51.6. 39% are retired or semi-retired.
- 34% have been to Alaska before.
- Six out of ten visitors were traveling in couples, while 18 percent were traveling alone, and 22 percent in parties of three or more.

- 6 of 10 are college graduates with 26% holding advanced degrees; average household income was \$103,000.
- 56% overall and 49% overnight Alaska visitors include South Central Alaska in their tour; 28% visit Denali.

The Matanuska-Susitna Borough Tourism Infrastructure Study (June 2008) reports the following estimates for out-of-state tourism:

- The annual volume of all visitors to the Mat-Su Borough was estimated to be nearly 780,000 visitors in 2006/2007.
- An estimated 332,000 out-of-state visitors traveled to the Mat-Su Borough. Summer visitation represented nearly 90 percent of the out-of-state visitor activity.
- The cruise market is anticipated to grow between 2 and 5 percent annually over the next five years. The percentage of passengers that spend time in Alaska before or after their cruise is also growing (including participation in tour packages and time spent on their own).

- About 12 percent of cruise passengers spend additional time in Alaska (outside of their tour package). This market segment is growing between 2 and 5 percent each year. It is anticipated that more of these cruise passengers will spend time in the Mat-Su Borough due to increased public and private investment in infrastructure and attractions.
- The independent visitor market that travels to and from Alaska by air is expected to grow steadily. Many of these visitors rent cars or RVs and have high potential for Mat-Su communities and attractions.
- Popular visitor activities included visiting friends and relatives, wildlife viewing, cultural activities, hiking and nature walking, camping, and flightseeing.



Train platform at Denali National Park. August, 2007



Roadhouse in Talkeetna. August, 2007



Gift shop at Denali National Park. September, 2008



Morino Grill food service at Denali National Park. September, 2008

The February 2008 report, **Economic Impacts of the South Denali Implementation Plan** estimates that 350,000 cruise customers in 2007 took the “Gulf crossing” and that up to 200,000 took Denali NP land tours. They estimate (based on information from the cruise companies) that there will be a 20% increase in cruise land tours because of the new opportunities and new tours developed to take advantage of the visitor center.

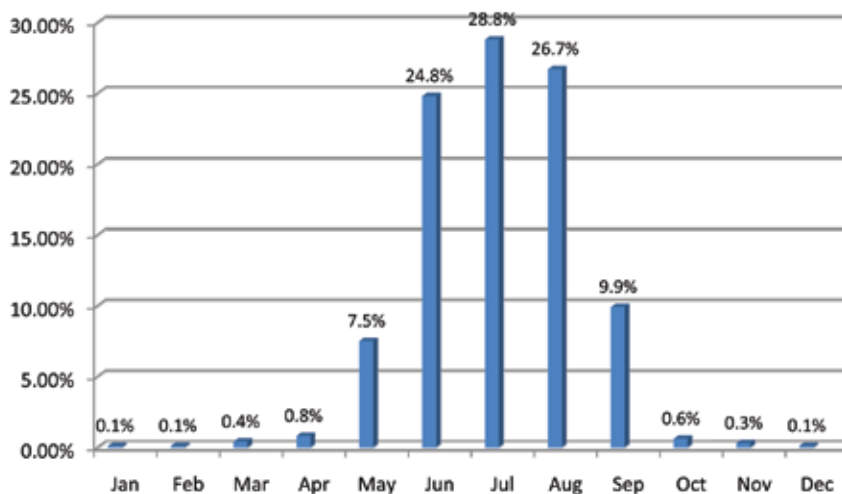
Denali National Park and Preserve Visitation (Source: DNPP fact sheet)

2008: 432,301 visitors
 2007: 458,307
 2006: 415,935

Visitation Scenarios for South Denali Visitor Center for 2010 and 2015 (Source: Final South Denali Implementation Plan and EIS, Appendix E, Visitor Projections)

	2010	2015
Low Growth Scenario (2%)	218,149	240,854
Medium Growth Scenario (4%)	245,105	298,208
High Growth Scenario (6%)	274,781	367,719

Denali NPP: 2004 Total Visitation percentage by month



(Source: Final South Denali Implementation Plan and EIS)

Discussion and Implications of Out-of-State Visitor Data

The data presented do not reflect the impact of the current economic recession on tourism in Alaska. The Alaska Visitor Statistics Program V reports that visitation to Alaska dropped by 0.4% between summer 2007 and summer 2008. It is difficult to make tourism projections for the immediate future, but past performance has shown that the tourism industry is resilient and rebounds quickly when the economic situation improves.

1. Cruise Package Tourists

Cruise package tours will comprise a large share of visitation to the South Denali Visitor Center in June, July, and August. In 2008 about 160,000 visited Denali National Park on a cruise land tour. However, this number is expected to decline to about 120-130,000 in 2009 and the number of cruise ships making regular Gulf crossings to Seward and Whittier will decline from ten to seven in 2010 (personal communication, Holland America/Princess-Alaska Land Operations).

The cruise industry is anticipating the development of the visitor center and will include it in many of their packages. A reasonable expectation is that about 100,000 cruise land package customers will visit South Denali annually with

growth potential into the future. Since about 85% of cruise visitation is in June, July, and August, this translates into approximately 1,000 cruise package visitors per day during this peak season. Special accommodation will be required for cruise package tourists. They will arrive in chartered buses with pre-paid shuttle tram tickets and a time limit on their visit. A separate loading zone is recommended. Cruise tourists are generally older, well educated and affluent, but there are an increasing number of families with children (personal communication, Holland America/Princess).

Cruise customers will appreciate the dramatic views, exhibits, and theater production which will provide welcome insights into the "spirit of Alaska." They will require time to shop for memorabilia. Many, if not all, will venture onto the Denali Vistas Trail, at least for a short distance to designated overlooks. When their allotted time is finished, they will board the shuttle tram as a group and return to their tour bus.



Star Princess Cruise courtesy of VASTtrak Vacations.





Bus loading facility in Denali National Park. September, 2008

2. Independent Tourists

In the summer of 2008, 1.4 million Alaska visitors came for “vacation or pleasure.” One million were cruise customers and about 330,000 arrived by air. Since about 12% (120,000) of the cruise customers travel independently after their cruise, the total Alaska independent tourists in 2008 were about 450,000.

Independent tourists will rent cars and RVs, and in the case of those visiting South Central Alaska, most will drive the George Parks Highway to their tourist destinations. The data indicate that about half of the independent tourists, about 200,000, came to South Central Alaska in 2008. It is reasonable to expect that about 100,000 will visit

the South Denali Visitor Center. A small proportion, about 10,000 (based on the reported data), will come during the shoulder and winter seasons. Therefore, about 90,000 independent tourists can be expected at South Denali during the peak months of June, July and August. This translates into about 1,000 daily independent tourists during these peak months.

Since this target market is only under self-imposed time limits, they should be encouraged to plan for a day-long experience on-site. This would include the visitor center media and facilities and hiking the Denali Vistas and Beaver Meadows trails. Multi-day visits would allow hikes on the Curry Lookout Trail.



Alaska Railroad train platform in Denali National Park. August, 2007

Alaska Residents

Anchorage and Mat-Su Borough residents are all within a three hour drive of the South Denali Visitor Center Complex at Milepost 135. The “Metro Statistical Area” (comprising Anchorage and Mat-Su Borough) encompasses 53% of Alaska residents with a 2008 population estimate of 364,700. This compares to a total 2007 state population of 683,478. The Anchorage growth rate is 1.4% and the Mat-Su Borough 4.2% which promises an increasing resident tourism base into the foreseeable future.

The **Matanuska-Susitna Borough Tourism Infrastructure Study** of June 2008 reports the following facts about resident tourism:

- Population growth in Anchorage (11 percent over the past decade) is extremely favorable for year-round Mat-Su visitation.
- The study team estimated that 446,000 Alaskans visited the Mat-Su Borough in 2007, with the largest market being Anchorage residents. Summer visitors represented nearly 60 percent or 262,800 visitors; the number of fall/winter visitors totaled 183,400 Alaskans.

The Economic Impacts of the South Denali Implementation Plan (February 2008) reports that one half of Alaskans living in Anchorage, the Kenai, or the Interior (Fairbanks and Environs) make at least one visit with about one million total “visits” to the Mat-Su Borough per year whose primary activity was:

- 9% visit developed campgrounds
- 13% camp
- 17% visit developed trail systems
- 17% hike
- 16% view wildlife
- 11% fish
- 4% boat
- 5% ski and snowshoe
- 8% snow machine

Camping, hiking, and viewing wildlife are major activities that Alaska residents participate in. The South Denali Visitor Center will serve as a hub for these activities. Camping on Curry Ridge. September, 2007





Residents at the community meetings felt that a facility open year-round would best meet their needs. Many were looking for more non-motorized recreational opportunities, like hiking, cross-country skiing, and snowshoeing.

Photo courtesy of Jill Homer, "Up in Alaska—Jill's Subarctic Journal"

Community Meetings

In September 2007, the planning team held community meetings and received public input in Anchorage, Wasilla, and Trapper Creek. Selected responses to one question provide guidance to the development and management of the South Denali Visitor Center Complex:

"How can the South Denali facility be developed to benefit Alaska resident?"

- Keep the facility open year-round. Most of the winter the mountain is visible.
- Provide space for Mat-Su school classes. The shoulder seasons will be ideal for field trips to the site. Offer teacher training workshops.
- Provide space for meetings. Offer retreats and educational opportunities around the core values of the landscape and Alaska issues.
- Have a warming area with a fireplace. Make it comfortable for people who cannot be outside where they can linger and watch the expansive view of the Alaska Range.
- Development of hiking trails will benefit Alaska residents. Not many trails in the state just for hiking, most are multi-use. Encourage non-motorized recreation such as snowshoeing and cross-country skiing.

Discussion and Implications of Alaska Residents Visitor Data

1. Residents hosting out-of-state visitors

The South Denali Visitor Center will be a major attraction for Alaska residents entertaining out-of-state visitors. As reported in the Alaska Visitor Statistics Program 2008 data, during the summer, 153,700 (9% of total summer visitation) are visiting family and friends, and during the winter, 104,700 (42% of winter total). Since South Denali will be easily accessible to more than half of Alaska residents, will be open year-around, and offers a "real Alaska" experience, it can be expected that this will be a significant market. Most important, this is a significant market winter and summer.

Residents are always looking for places to entertain their guests. It will be important to offer shoulder season and winter hours and perhaps a winter snow coach shuttle to the visitor center.

2. Residents on weekend and day-trip recreation excursions

The South Denali Visitor Center will be an ever-growing recreation venue for Alaska residents. As reported above, more than 75% of the 446,000 annual Alaska resident visitors to Mat-Su Borough are for outdoor pursuits including camping, hiking, snowshoeing, skiing and wildlife viewing. South Denali is easily accessible for more than half of Alaska residents and offers these recreational activities in one of the most scenic locations in the world. This will be a significant shoulder and winter season target market before and after the summer onslaught of tourists in June, July and August. A winter weekend snow coach shuttle to the visitor center would make this a popular winter destination for snowshoeing, skiing or simply enjoying the views.

As reported in the community meeting data, there is a strong sentiment that Curry Ridge in the vicinity of the visitor center be designated as a non-motorized recreation zone to preserve the quiet and serenity that the majority of residents are seeking and a place to enjoy the views from the trails and visitor center. The South Denali trails and visitor center will offer family-friendly recreational and learning experiences. This will be a popular venue for parents to bring their children.

3. Schools of Mat-Su Borough

The Mat-Su Borough School District currently has 37 schools ranging in size from 25 to over 1,000 students. The larger schools are in urban settings while some of the outlying schools are located farther north at the base of Denali. The Mat-Su Borough School District has an enrollment of 15,500 students, employing 1,005 teachers. It is the second largest and the fastest growing school district in the State of Alaska.

Participants in the community meetings envision the South Denali Visitor Center as ideal for class field trips and teacher training, especially in the shoulder season. The center educational exhibits and interpretive trails can be readily incorporated into the curriculum of the Borough School District. Coordinating field trips will require significant time for one or more staff members. Field trip visits could be independent of staff leadership, but online materials should detail how teachers can effectively use the visitor center exhibits, theater program, and interpretive trail. Special programs could be offered in the multi-purpose room.



The South Denali facility will be an ideal place for school field trips that focus on the natural history of the region.

Photo at Kachemak Bay National Estuarine Research Reserve, courtesy of NOAA

