SEAtrails

Business and Marketing Plan

Supporting Research

SEA trails

June 2008

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Prepared for:

SEAtrails – Southeast Alaska Trail System

**Alaska Department of Commerce,
Community and Economic Development**

**Western Federal Lands Highway Division,
Federal Highway Administration**

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Cover photos, clockwise from left:
El Capitan, Whale Pass; Balls Lake, Thorne Bay; Mt. Ripinsky, Haines; Alaska Marine Highway vessel

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Introduction

Established in 2003, SEAtrails is a non-profit organization with a mission to "facilitate planning, promotion, maintenance, and construction of a region-wide Southeast Alaska trail system that will stimulate economic development, enhance quality of life, and improve transportation." In 2007, SEAtrails received a grant for a *Business and Marketing Plan* from the Alaska Department of Commerce, Community and Economic Development. McDowell Group, Inc., a research and consulting firm based in Juneau, conducted the study. This document presents supporting research for the Business and Marketing Plan.

Since 2000, the agencies and volunteers involved in SEAtrails have accomplished a considerable amount of work, including inventorying regional recreational and cultural features, securing participation and endorsement from 19 regional communities, forming a non-profit organization and Board of Directors, completing the SEAtrails Trails and Transportation Master Plan (TTMP), awarding a significant number of trail improvement and maintenance grants, and developing the SEAtrails website. However, the organization is facing challenges shared by many non-profits, such as inconsistent funding and lack of staff support. This business and marketing plan aims to provide SEAtrails the tools it needs to take the organization to the next level – to achieve sustainability, establish and strengthen partnerships, and ultimately fulfill the SEAtrails mission.

SEAtrails Communities, 2007

Methodology

Visitor Research

Baseline visitor research is provided in two sections: visitor profile and visitor traffic. The visitor profile data is extrapolated from the McDowell Group's 2006 study for the Department of Commerce, Community and Economic Development: *Alaska Visitor Statistics Program V* (AVSP). Survey results are presented based to non-cruise visitors to Southeast Alaska, with additional information provided on visitors to selected SEAtrails communities. Visitor volumes to Southeast and some SEAtrails communities were also derived from AVSP data. Additional traffic data was obtained from the Alaska Marine Highway System, Juneau International Airport, Cruise Line Agencies of Alaska, and the National Park Service. For further information on AVSP methodology, please see the Baseline Visitor Data chapter.

Site Visits and Partner Meetings

The study team conducted site visits to the following SEAtrails communities, selected by the SEAtrails board: Haines, Juneau, Ketchikan, Petersburg, Wrangell, Craig, Coffman Cove, Naukati, Thorne Bay, Sitka, and Skagway. Interviews were conducted with a wide variety of community representatives and trail stakeholders, including city administrators, Forest Service employees, trail organizations, local businesses (such as kayak rental companies, bicycle shops, and guiding companies), Chamber of Commerce representatives, Convention and Visitors Bureaus, and SEAtrails board members, among others. To the extent that time allowed, the study team visited SEAtrails-designated trails within each site visit community. The study team also met with current and potential partner organizations, including Southeast Alaska Tourism Council, Alaska Marine Highway, Inter-Island Ferry Authority, Alaska Airlines, Alaska Department of Fish and Game, Alaska State Parks, and the Alaska Travel Industry Association. A complete list of contacts can be found in Appendix II.

Case Studies

Three trail organizations were selected as case studies for this report: the Pacific Crest Trail Association, the Appalachian Trail Conservancy, and Island Trails (on Prince Edward Island). Each of these groups were profiled in terms of their structure, membership, trail access, partnerships, budget, staff, marketing activities, and websites. The study team conducted interviews with representatives of each organization, as well as representatives of related destination marketing organizations. Brief profiles of several additional trail entities are provided because their websites may be useful to consult as the SEAtrails website is redesigned: Cleveland Area Mountain Bike Association, Noquemanon Trail Network (Michigan), and Waymarked Ways of Ireland.

Website Research

The study team consulted three recent studies of Alaska destination websites, all conducted for the Alaska Travel Industry Association: an online survey of travelalaska.com users; an analysis of the *North to Alaska* website based on focus group and survey research; and a comparative analysis of travelalaska.com alongside selected destination websites. A fourth study that was consulted was the

Images of Alaska report, also prepared for the Alaska Travel Industry Association. The nationwide survey of potential travelers to Alaska reveals what appeals to them about an Alaska vacation. Relevant findings from these studies are provided in the report.

SEAtrails Website Upgrade

The McDowell Group sub-contracted with Clutch Media and Marketing, an Anchorage-based advertising firm that specializes in website design, to upgrade the SEAtrails website based on study findings and recommendations. Clutch Media had participated in the original website design.

SEAtrails Board Meetings

The scope of work included facilitation and funding for two SEAtrails board meetings where the project was planned and reviewed: one in Ketchikan (July 30 and 31, 2007) and one in Sitka (October 21 and 22, 2007).

Southeast Alaska Visitor Profile

Introduction

This section provides a profile of the out-of-state visitor market most likely to use SEAtrails: non-cruise visitors who spent time in Southeast Alaska. The overall market to Southeast is profiled, alongside visitors to each SEAtrails community which had a large enough sample size for analysis: Juneau, Ketchikan, Skagway, Sitka, Gustavus, Haines, Petersburg, and Wrangell.

The data is derived from the Summer 2006 *Alaska Visitor Statistics Program*. Commissioned by the Alaska Department of Commerce, Community and Economic Development, AVSP V consists of two main components: an estimate of visitor volume, and a survey of visitors as they exited Alaska. This report is based on data obtained for the Summer 2006 (May through September) study period.

The Visitor Volume estimate was based on visitor/resident tallies of 49,703 travelers exiting Alaska at major exit points. The resulting ratios were applied, by month and by location, to traffic data (for example, highway border crossings, ferry disembarkations, airport enplanements) to arrive at the visitor volume estimates.

The Visitor Survey included 2,703 intercept surveys (in-person interviews) and 2,956 surveys completed online, for a total of 5,659 surveys. Of these visitors, 1,317 visited the Southeast region. Visitors were surveyed at all major exit points: airports, highways, cruise ship docks, and ferries. To obtain the online sample, "invitation cards" were distributed to visitors during intercept sample periods, inviting them to participate in an identical web-based survey. The response rate for the intercept survey was 86 percent; for the online survey, 18 percent. All data was weighted to reflect actual traffic volumes by mode of transportation.

The table below shows the sample sizes for each of these markets and the maximum margin of error at the 95 percent confidence level.

Sample Size by Destination
Non-Cruise Visitors to Southeast Alaska

	Sample Size	Maximum Margin of Error
Southeast	1,317	±2.8%
Juneau	569	4.2
Ketchikan	501	4.5
Skagway	367	5.2
Sitka	370	5.2
Gustavus	144	8.2
Haines	280	5.8
Petersburg	191	7.1
Wrangell	187	7.1

Certain data in this report excludes online survey data due to misinterpretation of several questions by Internet respondents. The sample sizes for these questions are somewhat lower than for other questions, leading to a higher margin of error. The intercept-only data is noted in footnotes to each table.

Further information on the methodology of the *Alaska Visitor Statistics Program V* can be found in the full report, available at: http://www.commerce.state.ak.us/oed/toubus/research.htm.

Implications for SEAtrails

Findings from the Southeast Alaska non-cruise visitor profile and statistics that are relevant to the SEAtrails Business and Marketing Plan are summarized below.

- Four out of ten non-cruise visitors participate in hiking and/or nature walks, while less than 5 percent go kayaking, canoeing, or biking. As sample itineraries and website content are developed, SEAtrails should keep these relative participation rates in mind.

- Visitors that purchase multi-day wilderness lodge or adventure packages represent only a few percent of the overall non-cruise market. SEAtrails has an opportunity to highlight existing packages and encourage more operators to develop packages.

- Given the small size of the guided and unguided adventure market, SEAtrails will have to pursue creative, cost-effective ways to target these prospective visitors.

- With nearly 40 percent of the market staying in one community only, SEAtrails should promote day trips and short outdoor recreation packages that can be easily incorporated into visitors' current travel plans. Additionally, SEAtrails should cross-sell trail experiences and partnering communities at visitor information centers.

- With 30 percent of the market spending some time visiting friends and family, it will be very important to educate regional residents about SEAtrails (while simultaneously encouraging local participation and trail usage).

- Given current visitors' very high intention to travel to Alaska in the next five years (60 percent) as well as their strong intended Alaska referral rate (76 percent), SEAtrails should try to maintain communication with current visitors. Methods may include membership services, website forums, and an e-newsletter.

- Leading information sources include the Internet, brochures, and travel guides/books. SEAtrails should focus marketing efforts in these areas.

- More than half of all non-cruise visitors to Southeast hail from the Western US states. SEAtrails should take this into consideration as they allocate resources for travel media support, consumer and trade shows, and promotions with regional transportation providers.

Findings

- One out of seven Southeast non-cruise visitors (14 percent) are traveling for the purpose of visiting friends and relatives (VFR). This figure is highest among Juneau and Ketchikan visitors (16 percent and 14 percent, respectively) and lowest among Skagway and Wrangell visitors (6 percent and 7 percent).

- Twenty-five percent of Southeast non-cruise visitors purchased a multi-day package; among package purchasers, sportfishing was the leading package type (63 percent).

- Of visitors who purchased a multi-day package, 13 percent purchased a wilderness lodge package and 7 percent purchased "adventure tour packages" – for example, multi-day kayaking or hiking tours. Each of these package types represent only a few percent of the overall Southeast non-cruise market. Visitors to Juneau, Gustavus, and Haines were more likely to purchase these kinds of packages.

- Seven out of ten Southeast non-cruise visitors traveled to and from Alaska via airplane, with most of the remainder entering and exiting by highway. Only 8 percent of the market entered Alaska by ferry, and 7 percent exited by ferry.

- However, when asked how they traveled between communities, 23 percent of the market said they used the ferry. This number was much higher among visitors to Haines (59 percent) and Wrangell (55 percent). It was lowest among visitors to Ketchikan (23 percent) and Sitka (31 percent).

- Airplane was slightly more popular than the ferry as a method of traveling between communities, accounting for 29 percent of this visitor market.

- Nearly four out of ten Southeast non-cruise visitors (38 percent) did not travel between communities; that is, they stayed in one community. This figure varied widely among visitors to different communities; it was highest among Sitka and Ketchikan visitors (48 and 45 percent), and lowest among Skagway and Haines visitors (7 and 8 percent).

- Southeast non-cruise visitors spent an average of 11.4 nights in the state, ranging from 10.8 nights among Sitka visitors to 19.0 nights among Wrangell visitors. The average length of stay within Southeast was much shorter, at 6.3 nights.

- Visitors' average length of stay within each community ranged from 2.3 nights in Skagway to 4.8 nights in Gustavus. Other averages included: Haines at 2.9, Juneau and Wrangell at 3.8, Petersburg at 4.0, Ketchikan at 4.3, and Sitka at 4.4.

- The most common destination among this market was Juneau, visited by 39 percent of all Southeast non-cruise visitors, followed by Ketchikan (33 percent), Skagway (27 percent), and Sitka (23 percent) as the most-visited communities. Haines, Wrangell, Petersburg and Gustavus each captured between 10 and 20 percent of the market. Prince of Wales Island and Hoonah were visited by less than 10 percent of the market, along with other SEAtrails communities that were not captured individually in the survey: Yakutat, Angoon, Kake, and Pelican.

- The data shows a significant amount of inter-travel between SEAtrails communities. For example, among Gustavus visitors, 54 percent also visited Juneau. Among Petersburg visitors, 69 percent also visited Ketchikan. As could be expected, these relationships were strongest between communities in close proximity: Petersburg/Wrangell, Haines/Skagway, and Gustavus/Juneau.

- Southeast non-cruise visitors were most likely to stay in hotels/motels on their Alaska trip, with 52 percent spending at least one night in a hotel or motel. About one-quarter stayed in lodges (such as fishing lodges), and 14 percent in B&B's. Camping accounted for a significant portion of visitors, with 17 percent staying at least one night in commercial campgrounds; 12 percent in state/national campgrounds, and 6 percent "wilderness camping."

- The most popular activities among Southeast non-cruise visitors were shopping (65 percent), wildlife viewing (55 percent), and fishing (51 percent). The survey measured participation in several activities particularly relevant to SEAtrails: hiking/nature walk (40 percent), camping (19 percent), kayaking/canoeing (5 percent) and biking (2 percent).

- It is important to note that 30 percent of this market listed "visiting friends/relatives" as an activity – twice as many as those who reported visiting friends or relatives as the purpose of their trip (14 percent).

- Southeast non-cruise visitors expressed high levels of satisfaction with their Alaska trip. Seven out of ten were "very satisfied" with their overall experience. Categories with high levels of satisfaction included friendliness of residents, sightseeing, and wildlife viewing. Categories with lower levels of satisfaction included restaurants, shopping, and value for the money.

- Three-quarters of this market said they were very likely to recommend Alaska as a vacation destination, and 60 percent were very likely to return to Alaska in the next five years.

- Over half of Southeast non-cruise visitors (58 percent) had been to Alaska before for vacation, and reported 5.1 average previous trips. Repeat rates were highest among visitors to Sitka (60 percent) and Ketchikan (62 percent).

- Among repeat visitors, 11 percent had used a cruise ship to enter or exit Alaska on their previous trip. This translates into 6 percent of the entire Southeast non-cruise market.

- Southeast non-cruise visitors made the decision to come to Alaska an average of 7.9 months ahead of time, and made their travel arrangements an average of 3.9 months ahead of time.

- Two-thirds of visitors (67 percent) used the Internet in planning their trip, including 50 percent who booked some portion of their trip online. Among online bookers, airfare was the most common item booked (42 percent), followed by lodging (17 percent) and ferry (8 percent).

- The number one information source, besides the Internet, was friends/family, mentioned by 47 percent of visitors. This was followed closely by prior experience (46 percent). This market did not use other sources at very high rates: the third most-commonly used source of information – brochures – was only mentioned by 19 percent of visitors. (Although CVB's were only mentioned by 8 percent,

visitors often have difficulty recognizing information originating from CVB's, such as community brochures and websites.)

- Over half of Southeast non-cruise visitors (53 percent) hail from Western US states. This rate was highest among Sitka and Ketchikan visitors (62 and 59 percent, respectively) and lowest among Skagway and Haines visitors (24 and 34 percent, respectively). Not surprisingly, Skagway and Haines visitors reported much higher percentages of Canadian visitors (25 and 17 percent). They also reported much higher rates of visitors from other international countries.

- Southeast non-cruise visitors traveled in parties averaging 2.3 people. There were significantly more males than females (62 versus 38 percent), likely attributable to sportfishing visitors. The average age was 50.8 years old.

- Education and income levels tended to be high among Southeast non-cruise visitors. Six out of ten were college graduates, and the average income reported was $104,700.

Trip Purpose and Packages
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Trip Purpose					
Vacation/pleasure	74%	69%	68%	91%	79%
Visiting friends/rel.	14	16	14	6	12
Business only	6	9	9	1	4
Business/pleasure	6	7	9	2	4
Purchased multi-day package					
Yes	25%	24%	28%	15%	39%
Package type (Base: non-cruise, purchased package)					
Fishing lodge	63%	34%	63%	4%	77%
Wilderness lodge	13	24	12	19	9
Adventure tour	7	13	5	9	4
Rail package	3	7	5	9	1
Motorcoach tour	3	<1	1	14	2
Other	12	22	13	44	7

	Gustavus	Haines	Petersburg	Wrangell
Trip Purpose				
Vacation/pleasure	83%	88%	80%	82%
Visiting friends/rel.	12	8	10	7
Business only	<1	1	2	2
Business/pleasure	4	3	8	9
Purchased multi-day package				
Yes	23%	10%	23%	24%
Package type (Base: non-cruise, purchased package)				
Fishing lodge	33%	5%	20%	11%
Wilderness lodge	18	7	25	43
Adventure tour	13	27	9	9
Rail package	15	6	1	2
Motorcoach tour	1	6	2	1
Other	20	50	44	35

Transportation Modes
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Mode of Entry into Alaska					
Air	70%	75%	71%	28%	82%
Highway	21	12	8	60	7
Ferry	8	12	19	11	11
Mode of Exit from Alaska					
Air	71%	79%	73%	30%	81%
Highway	21	12	8	59	5
Ferry	7	9	16	10	12
Used to Travel Between Communities[1]					
Air	29%	41%	34%	17%	27%
State ferry	23	40	23	53	31
Rental vehicle	11	18	9	17	12
Personal vehicle	7	8	4	13	6
Personal RV	5	3	1	15	2
Train	4	7	4	10	8
Motorcoach/bus	3	5	3	4	4
Rental RV	3	2	<1	3	2
None of the above	38	28	45	7	48
Don't know/refused	3	1	1	8	1

	Gustavus	Haines	Petersburg	Wrangell
Mode of Entry into Alaska				
Air	77%	28%	57%	58%
Highway	15	58	13	19
Ferry	7	12	27	22
Mode of Exit from Alaska				
Air	76%	30%	63%	62%
Highway	16	55	15	19
Ferry	5	13	19	13
Used to Travel Between Communities[1]				
Air	71%	16%	30%	38%
State ferry	27	59	52	55
Rental vehicle	18	14	14	22
Personal vehicle	1	19	11	11
Personal RV	6	11	2	6
Train	5	6	7	2
Motorcoach/bus	11	5	2	3
Rental RV	11	8	6	1
None of the above	12	7	23	16
Don't know/refused	3	1	-	-

[1] Based to intercept respondents only.

Length of Stay, Destinations & Lodging Type
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Average length of stay in Alaska	11.4 nights	12.0 nights	12.1 nights	14.8 nights	10.8 nights
Average length of stay in each destination	6.3 nights	3.8 nights	4.3 nights	2.3 nights	4.4 nights
Other Regions Visited					
Southcentral	41%	46%	30%	64%	34%
Interior	37	39	28	68	28
Southwest	3	4	3	3	3
Far North	5	6	4	12	7
Southeast Communities Visited					
Juneau	39%	100%	39%	43%	44%
Ketchikan	33	32	100	24	34
Skagway	27	30	20	100	20
Sitka	23	26	23	17	100
Haines	19	21	14	44	15
Wrangell	14	17	23	18	19
Glacier Bay/ Gustavus	12	16	7	14	10
Petersburg	11	21	24	14	20
Prince of Wales Is.	7	2	20	1	1
Hoonah	2	6	3	4	3
Other Southeast	10	14	9	3	6
Lodging Types Used					
Hotel/motel	52%	68%	55%	47%	55%
Lodge	25	25	26	17	37
Private home	21	22	23	11	17
Comm. campground	17	11	10	41	7
B&B	14	20	12	17	18
State/nat'l campground	12	9	8	27	7
Wilderness camping	6	6	5	9	1
Other	13	15	18	14	16

SEAtrails Business and Marketing Plan: Supporting Research

Length of Stay, Destinations & Lodging Type (cont'd)
Non-Cruise Visitors to Southeast Alaska

	Gustavus	Haines	Petersburg	Wrangell
Average length of stay in Alaska	11.9 nights	18.6 nights	15.6 nights	19.0 nights
Average length of stay in each destination	4.8 nights	2.9 nights	4.0 nights	3.8 nights
Regions Visited				
Southcentral	65%	67%	48%	68%
Interior	56	72	46	66
Southwest	8	4	5	7
Far North	5	10	8	14
Southeast Communities Visited				
Juneau	54%	44%	73%	48%
Ketchikan	19	24	69	53
Skagway	33	65	34	35
Sitka	19	19	41	31
Haines	27	100	30	28
Wrangell	16	21	55	100
Glacier Bay/ Gustavus	100	17	13	13
Petersburg	12	18	100	46
Prince of Wales Is.	2	1	6	9
Hoonah	7	7	9	7
Other Southeast	9	5	14	7
Lodging Types Used				
Hotel/motel	66%	45%	68%	62%
Lodge	36	10	17	19
Private home	18	16	17	13
Comm. campground	16	40	15	26
B&B	21	16	24	25
State/nat'l campground	12	26	14	21
Wilderness camping	9	11	6	6
Other	17	17	24	19

Statewide Activities[1]
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Shopping	65%	67%	64%	71%	72%
Wildlife viewing	55	56	52	55	60
Fishing	51	34	51	27	60
Hiking/nature walk	40	48	37	43	40
Museums	35	46	29	63	38
Visiting friends/rel.	30	33	36	20	23
Day cruises	27	42	16	53	22
Bird watching	25	25	23	25	29
City/sightseeing	23	34	19	33	25
Camping	19	18	6	42	7
Native cultural tours/activ.	12	13	17	16	12
Train	9	14	6	32	8
Flightseeing	9	12	10	15	8
Tramway	9	21	5	14	6
Shows/AK entertainment	7	10	7	14	8
Gold panning/mine tour	6	6	1	12	3
Kayaking/canoeing	5	7	5	5	5
Salmon bake	5	10	4	9	6
Rafting	2	4	2	7	3
Dog sledding	2	2	1	3	2
Biking	2	3	1	2	1

	Gustavus	Haines	Petersburg	Wrangell
Shopping	78%	69%	71%	81%
Wildlife viewing	72	65	76	80
Fishing	33	35	52	50
Hiking/nature walk	51	49	56	64
Museums	41	53	49	65
Visiting friends/rel.	30	25	36	47
Day cruises	70	46	41	41
Bird watching	49	37	21	35
City/sightseeing	20	34	37	33
Camping	28	43	20	17
Native cultural tours/activ.	21	15	18	19
Train	18	21	12	5
Flightseeing	18	14	11	8
Tramway	26	13	9	5
Shows/AK entertainment	12	10	7	15
Gold panning/mine tour	11	12	9	2
Kayaking/canoeing	8	11	9	6
Salmon bake	9	7	4	9
Rafting	9	8	7	4
Dog sledding	7	5	5	1
Biking	12	6	2	2

[1] Based to intercept respondents only.

Satisfaction Ratings
Non-Cruise Visitors to Southeast Alaska

	Southeast		Juneau		Ketchikan		Skagway		Sitka	
Compared to expectations										
Much higher	22%		21%		23%		28%		18%	
Higher	33		36		32		32		36	
About as expected	42		40		42		37		44	
Value for the money, compared to other destinations										
Much better	14%		12%		13%		15%		14%	
Better	22		23		27		20		24	
About the same	50		50		48		50		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)										
Overall experience in Alaska	70%	4.7	73%	4.7	74%	4.7	67%	4.6	75%	4.7
Accommodations	40	4.2	38	4.2	42	4.3	28	4.1	42	4.3
Restaurants	28	4.0	27	4.0	31	4.1	24	3.9	28	4.0
Shopping	20	3.9	21	3.9	20	3.8	20	3.9	21	3.8
Visitor info. services	48	4.3	46	4.3	44	4.2	57	4.5	41	4.2
Sightseeing	61	4.6	64	4.6	59	4.5	59	4.6	59	4.5
Tours and activities	54	4.4	57	4.5	52	4.3	59	4.5	50	4.3
Wildlife viewing	60	4.5	65	4.5	61	4.5	58	4.4	59	4.5
Transportation within Alaska	35	4.1	37	4.2	37	4.2	28	4.0	34	4.1
Friendliness of residents	64	4.6	65	4.6	63	4.6	64	4.5	65	4.6
Value for the money	28	4.0	26	3.9	27	4.0	24	3.9	29	4.0
Very likely to recommend Alaska as a vacation destination	76%		76%		77%		75%		81%	
Very likely to return to Alaska in the next five years	60%		57%		65%		35%		65%	

Satisfaction Ratings (cont'd)
Non-Cruise Visitors to Southeast Alaska

	Gustavus		Haines		Petersburg		Wrangell	
Compared to expectations								
Much higher	23%		23%		21%		27%	
Higher	40		35		39		32	
About as expected	36		40		38		36	
Value for the money, compared to other destinations								
Much better	15%		12%		11%		19%	
Better	17		25		26		23	
About the same	53		52		53		47	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)								
Overall experience in Alaska	72%	4.7	71%	4.7	80%	4.8	79%	4.8
Accommodations	42	4.3	34	4.1	41	4.2	33	4.1
Restaurants	27	4.0	27	3.9	26	4.0	23	3.9
Shopping	18	3.9	22	3.9	25	3.9	22	3.8
Visitor info. services	56	4.4	64	4.6	53	4.4	55	4.4
Sightseeing	73	4.7	66	4.6	69	4.7	64	4.6
Tours and activities	60	4.5	59	4.5	50	4.4	49	4.3
Wildlife viewing	71	4.6	62	4.5	67	4.6	71	4.6
Transportation within Alaska	40	4.2	33	4.0	36	4.1	35	4.2
Friendliness of residents	64	4.5	66	4.6	65	4.6	77	4.7
Value for the money	30	3.9	26	3.9	18	3.9	20	3.8
Very likely to recommend Alaska as a vacation destination	75%		80%		84%		80%	
Very likely to return to Alaska in the next five years	49%		46%		62%		50%	

Previous Alaska Travel
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Been to Alaska before for vacation	58%	55%	62%	44%	60%
Average # of vacation trips (base: repeaters)	5.1	4.6	5.3	4.1	3.9
Previous mode of transportation used to enter/exit Alaska					
Air	74%	81%	79%	44%	85%
Highway	16	12	7	50	5
Cruise	11	8	8	13	9
Ferry	6	5	11	6	7
	Gustavus	**Haines**	**Petersburg**	**Wrangell**	
Been to Alaska before for vacation	35%	47%	43%	46%	
Average # of vacation trips (base: repeaters)	5.6	5.9	3.3	3.0	
Previous mode of transportation used to enter/exit Alaska					
Air	73%	44%	81%	61%	
Highway	21	45	13	15	
Cruise	6	17	2	9	
Ferry	5	4	9	20	

Trip Planning[1]
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Ave. # of months, trip decision	7.9	7.7	7.3	9.7	8.4
Ave. # of months, trip booking	3.9	4.1	3.9	3.4	5.0
Used Internet[1]	67%	76%	67%	59%	71%
Booked over Internet[1]	50%	61%	58%	31%	51%
Airfare	42	49	49	16	44
Lodging	17	26	16	13	15
Ferry	8	15	10	13	14
Vehicle rental	8	12	7	6	6
Tours	7	11	2	10	5
Overnight package	2	1	2	<1	4
Booked through travel agent[1]	17%	22%	16%	16%	17%
Other Sources – Top 10[1]					
Friends/family	47%	46%	53%	31%	52%
Prior experience	46	46	62	19	43
Brochures	19	21	14	29	20
Milepost	16	18	8	33	12
Travel guide/book	15	22	7	30	13
AAA	12	19	5	19	14
Hotel/lodge	10	11	13	4	9
CVBs	8	12	6	13	3
Magazine	6	4	6	9	3
Clubs/organizations	2	2	4	2	1

Trip Planning (cont'd)
Non-Cruise Visitors to Southeast Alaska

	Gustavus	Haines	Petersburg	Wrangell
Ave. # of months, trip decision	7.3	9.6	8.1	9.1
Ave. # of months, trip booking	4.2	3.0	4.2	3.8
Used Internet[1]	81%	64%	78%	78%
Booked over Internet[1]	57%	34%	60%	62%
Airfare	43	20	48	53
Lodging	28	12	21	20
Ferry	7	12	25	31
Vehicle rental	16	8	8	2
Tours	17	6	7	7
Overnight package	4	1	<1	1
Booked through travel agent[1]	19%	20%	14%	13%
Other Sources – Top 10[1]				
Friends/family	38%	37%	58%	52%
Prior experience	38	22	41	55
Brochures	18	28	33	29
Milepost	14	37	30	40
Travel guide/book	31	34	15	22
AAA	23	18	15	26
Hotel/lodge	9	3	6	1
CVBs	12	11	14	25
Magazine	5	10	7	1
Clubs/organizations	4	3	2	8

[1] Based to intercept respondents only.

Demographics
Non-Cruise Visitors to Southeast Alaska

	Southeast	Juneau	Ketchikan	Skagway	Sitka
Origin					
Western US	53%	54%	59%	24%	62%
Southern US	13	12	13	15	12
Midwest US	10	9	10	12	10
Eastern US	7	9	5	4	8
Canada	9	4	4	25	1
Other international	17	16	13	44	7
Average party size[1]	2.3	2.2	2.2	2.2	2.6
Male/female	62/38	56/44	65/35	50/50	69/31
Average age	50.8	51.9	50.6	53.4	52.8
Children in household	24%	21%	28%	11%	18%
Retired/semi-retired	41	40	42	56	45
College graduate	60	67	57	55	62
Average income	$104,700	$108,800	$106,100	$88,300	$107,300

	Gustavus	Haines	Petersburg	Wrangell
Origin				
Western US	37%	34%	49%	45%
Southern US	19	18	15	14
Midwest US	13	11	7	13
Eastern US	2	1	4	4
Canada	4	17	3	4
Other international	19	34	18	18
Average party size[1]	2.3	2.5	2.4	2.4
Male/female	55/45	51/49	62/38	55/45
Average age	50.7	52.9	51.9	52.9
Children in household	17%	12%	20%	13%
Retired/semi-retired	45	57	45	50
College graduate	62	54	59	56
Average income	$103,800	$84,500	$98,800	$91,900

[1] Based to intercept respondents only.

Southeast Alaska Visitor Traffic Indicators

Introduction

The data below shows the estimated number of out-of-state, non-cruise visitors to most SEAtrails communities between May and September, 2006. These figures are based on data from the *Alaska Visitor Statistics Program V*, a comprehensive visitor study commissioned by the Department of Commerce, Community and Economic Development. The study included a survey of 5,659 out-of-state visitors and volume estimates based on nearly 50,000 visitor/resident tallies at the state's major exit points. The data in the table below is derived from survey responses indicating day or overnight visitation to communities, applied to volume estimates for non-cruise visitors.

Implications for SEAtrails

- Cruise visitation in 2006 was approximately 1 million visitors, while non-cruise visitation was nearly 180,000 visitors. SEAtrails should consider ways to tap into this incredibly large number of travelers for membership, future adventure travel, and purchase of SEAtrails merchandise.

- It is important to recognize that the current non-cruise visitor volume to different SEAtrails communities varies widely – from fewer than 1,000 visitors to nearly 200,000. Each community has a different "starting place" from where they can grow the SEAtrails market. The types of visitors among SEAtrails communities also vary widely – for example, Juneau attracts approximately 1 million cruise visitors, while most visitors to Haines travel by highway and ferry. Such differences should be taken into account as SEAtrails executes the marketing plan.

- Total marine highway traffic in the region has been steadily decreasing over the last decade. While 2006 saw a slight increase, future traffic is uncertain. In the same period, deplanements at the Juneau airport have increased by approximately 50,000.

  - In order to reach as much of the travel market as possible, SEAtrails should acknowledge the importance of air travel to the region. The website should include planning information for these visitors whose schedule or preferences lead them to choose air over ferry transportation. SEAtrails should consider promotion at major airports.

  - At the same time, SEAtrails and marketing partners should consider ways to increase Alaska Marine Highway usage by promoting intra-regional ferry travel and multi-modal transportation options.

- Ferry traffic is highest in Juneau, Ketchikan, Haines and Skagway. Given the volume of travelers, the ferry terminals in these communities may be optimal for disseminating information about SEAtrails communities and activities.

- Visitation to National Parks in Southeast has increased dramatically over the last decade. While this increase is largely driven by the cruise market, it is important to recognize the growing recognition of these federally designated areas. SEAtrails should educate potential travelers about the unique opportunities available to independent travelers who are spending more time in the parks and gateway communities.

Findings

Southeast Alaska attracted nearly 180,000 non-cruise visitors from outside Alaska in summer 2006. This represents 11 percent of all Alaska visitors, and 27 percent of non-cruise visitors. Their most popular destinations were Juneau at 70,000, Ketchikan at 56,000, and Skagway at 46,000. Please see the Visitor Profile section for information on the non-cruise market to Southeast: trip purpose, length of stay, lodging, activities, trip planning, and demographics, among other data.

Estimated Summer 2006 Non-Cruise Visitor Volume, SEAtrails Communities

	Non-Cruise Visitors
Southeast	179,000
Juneau	70,000
Ketchikan	56,000
Skagway	46,000
Sitka	41,000
Haines	31,000
Wrangell	23,000
Glacier Bay/Gustavus	21,000
Petersburg	19,000
Prince of Wales Is.	12,000
Hoonah	4,000

Note: Due to the small number of visitors to Kake, Angoon, Pelican, and Yakutat, visitation to these individual communities was not measured.
Source: *Alaska Visitor Statistics Program V*, McDowell Group, Inc.

Cruise Ship Visitation

Southeast Alaska's cruise traffic has nearly doubled over the last decade, with growth rates fluctuating year-to-year. Traffic increased by 8 percent in 2005, by less than 1 percent in 2006, then by 6 percent in 2007.

Alaska Cruise Ship Passenger Volume, 1997-2006

	Cruise Passengers
1997	524,900
1998	569,700
1999	596,000
2000	640,500
2001	690,600
2002	739,800
2003	777,000
2004	884,400
2005	953,400
2006	958,900
2007	1,015,384

Source: Cruise Line Agencies of Alaska.

Of SEAtrails' 19 member communities, eight receive cruise ship calls. (While Glacier Bay is included in the table below for informational purposes, Gustavus does not receive any cruise ship traffic.) Juneau, Ketchikan, and Skagway are the three major cruise destinations in the region, followed by Glacier Bay and Sitka. It is important to note that in addition to the 33,000 passengers disembarking in Haines, there are an estimated 60,000 cruise visitors who come on day trips from Skagway. Petersburg and Wrangell receive only a fraction of the region's cruise traffic, at 10,700 and 5,800, respectively.

Cruise Ship Passenger Volume, 2006
SEAtrails Communities

	Cruise Passengers
Southeast	958,900
Juneau	951,400
Ketchikan	838,900
Skagway	767,400
Glacier Bay	402,900
Sitka	267,000
Haines[1]	32,900
Petersburg	10,700
Wrangell	5,800

Source: Cruise Line Agencies of Alaska.
[1] An additional 60,000 cruise passengers are estimated to visit Haines from Skagway on day tours.

Additional Traffic Indicators

Passenger traffic aboard the Alaska Marine Highway for Southeast ports decreased by 21 percent between 1997 and 2006. The most significant declines occurred in 2000 (7 percent) and 2001 (10 percent). The last year, however, saw the system's first increase since 1999: traffic grew by 1.8 percent between 2005 and 2006.

Alaska Marine Highway
1997-2006 Annual Passenger Traffic, Southeast Routes

	Disembarking Passengers
1997	300,653
1998	303,076
1999	323,540
2000	301,176
2001	270,443
2002	263,040
2003	245,818
2004	240,666
2005	233,667
2006	237,965

Source: Alaska Marine Highway Annual Traffic Volume Report, 2006.

The table below shows that of SEAtrails communities, Juneau receives by far the most traffic, at 66,000 passengers. Ketchikan receives about half as many passengers (33,000), followed closely by Haines (30,000). Most SEAtrails communities experienced the same declines in ridership faced by the overall system over the last decade. Last year saw traffic growth in a few ports (particularly in Ketchikan), and sharp declines in others – Pelican's traffic fell in half, while Haines and Skagway each went down by about 2,500.

Alaska Marine Highway
1997-2006 Annual Passenger Traffic, SEAtrails Communities

Southeast	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Angoon	4,307	3,940	4,419	4,273	3,962	4,398	3,949	3,554	3,720	3,775
Haines	38,948	37,804	40,054	38,779	33,333	36,923	35,237	34,055	32,223	29,759
Juneau	68,552	71,377	80,660	75,463	64,334	72,782	67,640	68,009	66,618	66,038
Kake	1,841	1,669	1,980	1,932	2,096	2,234	2,105	1,968	1,748	1,726
Ketchikan	51,793	47,908	52,473	47,813	43,099	32,664	29,628	27,976	27,173	33,336
Pelican	1,025	783	756	573	672	702	694	344	1,353	603
Petersburg	11,149	11,069	12,401	11,020	10,708	11,117	11,246	10,903	10,722	10,065
Sitka	16,383	16,636	15,843	13,593	13,989	13,975	13,459	14,956	13,292	13,357
Skagway	35,057	36,377	36,205	34,850	29,080	32,598	30,359	28,824	25,745	23,164
Wrangell	7,557	7,612	8,218	7,475	7,215	7,755	7,981	7,562	7,209	7,676
Yakutat	-	30	52	66	104	73	140	148	158	184

Source: Alaska Marine Highway Annual Traffic Volume Report, 2006.

Juneau airport deplanements are shown below as a general indicator of the region's air traffic. (Other communities' air traffic data are not readily available.) Over the last decade, deplanements have increased by 22 percent. Traffic has risen slowly but steadily in the last several years, with 3 percent increases in 2004 and 2005, followed by a 1.5 percent increase in 2006.

Juneau Airport Deplanements, 1997-2006
Alaska Airlines

Year	Deplaning Passengers
1997	235,402
1998	239,648
1999	243,414
2000	271,637
2001	275,500
2002	264,710
2003	265,236
2004	273,696
2005	282,679
2006	286,955

Source: Juneau International Airport Passenger Statistics.

National park visitation in Southeast Alaska has grown rapidly over the last decade, largely reflecting the growth in the cruise market. Visitation to Skagway's Klondike Gold Rush Park has increased by 38 percent since 1997, while Glacier Bay visitation has increased by 19 percent (with large fluctuations year-to-year). Visitation to Sitka's National Historic Park has also ebbed and flowed, with 270,000 in 1997, down to 160,000 the following year, and eventually up to 331,000 in 2006.

Southeast Alaska National Park Visitation, 1997-2006

	Sitka National Historic Park	Klondike Gold Rush National Historic Park	Glacier Bay National Park and Preserve
1997	269,606	655,858	347,046
1998	159,965	679,980	403,512
1999	197,809	693,883	442,607
2000	194,053	697,051	384,684
2001	211,984	713,436	380,114
2002	295,094	754,436	408,143
2003	251,036	844,576	366,319
2004	297,139	843,623	353,686
2005	291,610	888,255	359,829
2006	331,393	903,079	413,382

Source: National Park Service Public Use Statistics Office; www2.nature.nps.gov/stats

Site Visits and Partner Meetings

Introduction

McDowell Group coordinated a series of meetings and telephone interviews with community leaders, adventure tour businesses, outfitters (such as kayak and bicycle shops), and agencies affiliated with outdoor recreation. When schedules permitted, a SEAtrails board member and/or the Vista Coordinator participated in the meetings. The purpose of the meetings was two-fold: to raise awareness about SEAtrails activities and goals, and to capture input regarding SEAtrails future marketing activities and revenue-generating concepts. A list of contacts is included in Appendix II.

Implications for SEAtrails

- In general, those contacted expressed enthusiasm for the SEAtrails organization and goals. The business owners (including tour companies, outfitters, and rental shops) were very interested in keeping updated with SEAtrails information and possibly participating in marketing activities in the future.

- Many contacts agreed that due to its limited resources for marketing, SEAtrails should take advantage of the marketing power of its partners such as CVBs and the Marine Highway.

- A wide variety of marketing tactics were suggested by those interviewed, including (but not limited to): membership in nationwide adventure travel organizations; developing travel packages; creating special events; and working with travel writers. Many have been incorporated into the Marketing Plan; suggestions are presented in more detail below.

- Many of those interviewed agreed that SEAtrails should focus on its website as the most cost-effective way to market to visitors. Specific website recommendations include: develop sample itineraries; add a photo gallery; provide specific travel and logistical information; add links to nationwide trail and adventure travel organizations; and add user-generated content such as trail journals and reviews.

- The concept of the "SEAtrails Passport" was generally seen as too cumbersome and costly by those interviewed. Businesses said they would be unlikely to participate in such a program.

- Contacts suggested a wide range of organizations that SEAtrails should consider partnering with, including, but not limited to: Southeast Conference, local trail groups, regional tribal organizations, CVBs, Elderhostel, and public agencies such as State Parks. It was suggested that SEAtrails submit articles to newsletters in tourism and trail organizations.

- In terms of revenue generation, it was recommended that SEAtrails develop its membership program. Some contacts were apprehensive of a membership system because there are already so many membership organizations. They advised SEAtrails to ensure members value for their contribution.

- Other suggestions to generate revenue included: pursue grants, sell SEAtrails maps, sell advertising on SEAtrails materials, increase retail offerings, and sell links on the SEAtrails website.

Findings

Each meeting included a brief overview of SEAtrails history and current activities, using the SEAtrails index map, the *Trails and Transportation Master Plan*, and the SEAtrails website as resources. Comments and suggestions offered regarding SEAtrails are summarized below.

Marketing

- Develop a plan with specific goals and tasks to ensure that SEAtrails keeps the marketing focus.
- Need to leverage strategic partners like the Convention and Visitor Bureaus that have marketing resources and skills.
- SEAtrails should focus on developing the product and let Southeast Alaska Tourism Council and local communities take care of the marketing.
- SEAtrails should be an information organization, not a marketing organization. To accomplish the latter requires a lot more expertise and funding.
- Partner with Southeast Alaska Tourism Council, as they are already marketing the region. They are placing ads, attending trade shows, have a website, and already networked. Additionally, they have a track record of success, which is important when attracting funding for marketing.
- Need cohesive regional information at ferry terminals. May need to partner with Alaska Marine Highway System, Convention and Visitor Bureaus, and US Forest Service.
- It is important to promote travel packages. Research tells us that the visitor has limited time and Alaska is very complicated for travel planning. The most common trip length is 3 to 5 days.
- Consider membership in the Adventure Travel Association.
- Target companies that package travel like REI, Alaska Discovery, and Backroads.
- Some tour companies would hesitate to promote SEAtrails until they have closed the sale. Ask them to provide SEAtrails information after guests are booked to help enhance their stay before and after their tour.
- Work with promoters of large-scale events like the EcoChallenge.
- Before rolling out an expensive marketing campaign to attract outside visitors, be sure you are targeting regional and statewide residents.
- Explore marketing opportunities associated with the Scenic Byway program. AMHS' designation as an All American Road allows non-profits to pursue grants for marketing plans, interpretative plans, brochure development, and other special projects. (For example, another Alaska region produced map placemats with a Scenic Byway grant.)
- Develop an image library that can be accessed online by travel writers, Convention and Visitor Bureaus, and others.
- Expand usage of SEAtrails logo by allowing Alaska Marine Highway System, outfitters, and Convention and Visitor Bureaus to use it in their marketing materials. Also ask that the logo be used when marketing community festivals.
- Develop a SEAtrails rack card or brochure that Alaska Marine Highway System and others can take to trade shows. SEAtrails rack card could also be put into community media kits, "VIP" bags/folders, relocation packets, and convention delegate bags.

- Work with travel writers and marketing organizations to increase press coverage on SEAtrails. Seek articles in places like National Geographic Traveler, Outside Magazine, and other adventure publications.
- SEAtrails needs to hook into the right type of media. The State and some of the other marketing organizations have a broader focus.
- Monitor and contribute to the influential "blog" sites. Some people don't make a move with consulting Trip Advisor.
- Increase connection to wildlife viewing opportunities in the region.
- You need to make an emotional connection with potential visitors first, not a logical one. Engage visitors in why they should come to the region and they will do the research.
- Tell stories about the experience, not the trail and travel details. Those things should appear as a "side bar" to help people plan. They will go to the next level, if the trip story is compelling.
- Don't overlook recreational vehicle travelers. They use the trails for hiking, biking, and canoeing. They can also be great referral sources for SEAtrails.
- Post information on community information boards at private and public campgrounds.
- Put promotional information in cafes and bulletin boards on major bike trails where potential Alaska visitors would see it.
- Promote major recreational events (like the Kluane Bike Relay and the Buckwheat Ski Classic) in national magazines and club newsletters.
- Provide opportunities for member business to place co-op advertising with SEAtrails. Keep integrity by ensuring that marketing partners provide a service in the region related to SEAtrails.
- Look for Alaska or Southeast Alaska editorial when placing magazine ads to increase impact of placements.
- Look for strategic partners to help publish marketing materials. The Kenai Peninsula publishes a map with advertising. Without that support, they would not be able to distribute 20,000 free copies.
- Seek promotional opportunities specifically associated with ADA-accessible trails.
- Seek free or low cost advertising opportunities in regional or national club newsletters and magazines. Examples: cycling clubs, hiking, kayaking, and diving.
- Cross-promote the regional activities, understanding that the same people are actually in several market niches. The bikers are the divers and the kayakers and the skiers.
- Partner with representatives from dive certification programs like PADI to promote the region. Work on articles that promote the region—especially in the winter when visibility is best.
- Look at groups within Alaska that would come to Southeast for specialized activities.
- Some communities have multiple visitor guides including Chamber of Commerce, Convention and Visitor Bureau, newspaper, and/or privately-produced guides. It is important to understand the distribution of each publication.
- There is inconsistency within each community and across the region about the language and messages used to describe the region. For example, the Tongass is not even mentioned in some publications. In others, community histories/attractions are over-simplified.

- Develop short- and medium-length write-ups on SEAtrails, so they can easily be adapted for visitor guides and other marketing efforts.
- Write a paragraph about trail opportunities in each community, so it can be pitched to travel media.
- When looking at trade and consumer shows, invite businesses to insert their brochure into a SEAtrails information pack for a fee. Saves money for everyone.
- Tap into the new travel model "geo-tourism." People are looking for an authentic travel experience.
- Promote the fact that people can have authentic experiences, visit real places, and meet real people in the region.
- Consider featuring B & Bs and nearby trails as a unit. The B & B could feature the trail(s) in all their promotional materials.
- The State of Alaska needs to push more outdoor adventure.
- Inform people that have direct contact with visitors about SEAtrails.
    o Work with outfitters and guides to extend visitors' stay in the region.
    o Place SEAtrails information around cruise ship lightering docks. Tell people about the unique things they can do if they come back to Alaska and spend more time.
    o Use places like the Discovery Center and the Mendenhall Glacier Visitor Center as focal points to get SEAtrails information out.
    o Provide information to US Forest Service interpreters that travel onboard the ferries. Where/when is their training? How can SEAtrails participate?
    o Train staff at fee sites and information centers about SEAtrails. Include front office staff in ranger offices.
    o It is critical that the Alaska Marine Highway System terminal staff is also made aware of SEAtrails.
    o Charter fishing guides and lodges can tell people to extend their stay, entertain the non-fishing spouses, and keep people happy on poor weather days.
- While ferry kiosks are useful, the goal should be to get visitors signed on to SEAtrails long before they arrive in Alaska.
- POW should look into hooking into the Queen Charlotte Islands biking/camping market. It is only three hours by boat to Hydaburg.

Promotion and Upgrade of SEAtrails Website
- Need to determine what the priority of the website is. Elevate that information.
- The website is the key to accessing independent visitors.
- The web is the single most important tool. Need to develop sample itineraries with real time and cost information. Allow visitors to shop and compare features.
- Consider a direct booking mechanism on the website. Some Convention and Visitor Bureaus use Travel Hero. Other software is available. This allows you to track the direct benefit to members and marketing partners.

- Think about user-generated content for itinerary development and comments. Develop a place where people can post journals and photos.
- Think about regional residents' needs when thinking about how to make the website more useful and appealing.
- The website has a nice, clean look now. You can create links that are helpful for the visitor without cluttering it up with advertising.
- If you have advertising on the website, make it non-commercial and inviting up front.
- Feature links to Convention and Visitor Bureaus and Southeast Alaska Tourism Council on the site. In turn, they can list members.
- Secure agreements with regional transportation providers and marketing organizations to link SEAtrails from their websites.
- Provide SEAtrails link from municipal websites, as visitors frequently look there for information and maps.
- Promote an Inside Passage wildlife viewing trail. The map can have icons that connects to the State of Alaska's watchable wildlife program. (www.wildlifeviewing.alaska.gov)
- Consider reciprocal website links with outfitters and guides.
- Cautionary note: links from website may seem like an endorsement from SEAtrails of the companies.
- Be sure to measure total traffic to the SEAtrails website as well as the number of hits that an advertiser generates from it.
- Offer virtual tours. Link to virtual tours being developed by National Park Service and others.
- Link to existing webcams in the region. People come back to these again and again.
- Provide an online chat section for past and prospective visitors to share information. (Example: bear activity on this trail; bridge washed out here.)
- Be sure the website is clear about the degree of difficulty for trails.
- Showcase itinerary options (see New Zealand for examples).
- Provide more structure on the website regarding itineraries. Help people understand how to "bite" off a piece of the region. Help plant the seed that you need to return again and again.
- Provide itineraries that group several communities such as Juneau/Gustavus or Haines/Skagway/Juneau. Tell people what they can do, how long they need for each piece, and details on transfers and accommodations.
- As SEAtrails is promoted now there is no "peak experience" in the region, like Rainier or Denali. This makes it harder for the visitor to sift through all the information.
- Promote the travel agents and tour operators that can sell a package. Identify those that will help set up customized trips.
- Showcase people that have accomplished the whole trail.
- Provide a gear checklist.
- Include a suggested reading list, either developed by SEAtrails or posted by visitors.
- Provide a Frequently Asked Questions (FAQ) section that tells people what kind of clothing and gear they need and answers to other commonly asked questions.
- Conduct a photo contest, where residents and visitors can post their best photos on the website.

- Look to the National Park Service for example of enhanced web tools like 360 degree views, recordings, and other ways to draw people into the site. (Yellowstone example given.)
- Ask if the National Park Service can assist SEAtrails by making the technology available.
- Offer small, printable maps.
- Increase regional resident awareness of website through special events and promotions.
- Develop more content on Native cultural including historical and current canoe travel routes.
- Increase content on virgin forests, glaciers, and wildlife. These topics will draw people into the site and encourage them to explore the region.
- Direct people to local guides. They will have a safe and enjoyable trip that way.
- Tie trails and cabins together. Help increase usage of cabins.
- Every business linked on the website should get equal coverage. The website should not have flashy ads.
- Maybe businesses with links could get a period of time for free.
- SEAtrails should focus on its website as a marketing tool (versus other types of advertising). It is cost-effective and low-maintenance.
- The website has two audiences: visitors and partners/grantees. Website should serve both audiences.

Passport Concept and Electronic Tracking Programs
- Discounting tours and merchandise is not the way to attract visitors to the region or area trails.
- The season is too short, and profit margins too small, for tour operators to offer discounts just because SEAtrails wants to develop this program.
- It is impractical to think that merchants, transportation companies, and land management agencies would be able to implement a single computer system to accommodate the tracking and discount program.
- A private company already provides an Alaska Marine Highway pass program that is very similar in concept to the SEAtrails idea. They used to be located in Alaska; now they are in Washington State. (www.AlaskaPass.com)
- Don't compete with the private sector companies that are packaging and selling tours. Instead, help promote them through the website and your media efforts.
- Retail is tough enough already; not a good idea to ask retailers for a discount for pass holders.
- Passport/kiosk idea is not realistic. Kiosks would get vandalized. The costs are too high.

Community and Partner Development
- Look for partners like national agencies and municipal maintenance staff that can help with signage, webcams, and trail work.
- SEAtrails need to be strategic when defining their market, as this can increase or diminish potential partners. The market of people that travel independently through the region is small, while the number of residents and visitors that use trails is quite large.
- Public agencies may be able to help with community mapping efforts.
- Seek partnerships with organizations like Southeast Conference.
- There are already trail groups in Sitka, Ketchikan, and Juneau. Don't compete with their efforts.

- It is important to clearly communicate relationship between the local organizations. People don't want to see duplication of efforts or harm done to local groups.
- SEAtrails should participate in state and regional conferences where possible. Participation may include being a presenter, having SEAtrails materials there, as a co-sponsor, and/or asking the organization to use SEAtrails logo in their materials.
- Explore possible partnerships with regional tribal organizations.
- Sitka Tribe instrumental in coordinating the Historical and Cultural conference with Sitka Convention and Visitor Bureau. Could build stronger tie to SEAtrails.
- Pursue speaking engagements like the Chambers of Commerce, trail groups, municipal governments, and others that share desire to grow economic development and eco-tourism.
- Contribute SEAtrails articles to newsletters concerning trails, tourism development, and other topics relevant to SEAtrails.
- Need to update community contacts.
- Develop a SEAtrails conference. It could be a membership-building and fundraising activity. Held every other year, it could pull in national speakers on trail building, funding, and marketing. Work with the colleges to get credit for attendance. Offer ancillary fundraising activities like a cruise that is open to the public.
- Partner with Elderhostel. Promote lifelong learning and recreation.
- Help attract corporate and private sponsors for trails and cabins. Develop a SEAtrails adopt-a-cabin program.
- SEAtrails will need to be careful about unwanted business partners/members. Make a plan to handle that if it occurs.
- Communities do not necessarily need the approval of their city councils to become members of SEAtrails. The Parks and Recreation budget can cover the membership fees.
- Alaska State Parks has great assets and infrastructure but no way to market them. It could be a good partnership with SEAtrails. SEAtrails could help identify infrastructure priorities for State Parks.

Revenue Generation

- SEAtrails needs to hire an Executive Director to develop and manage programs—especially if focusing on earned income.
- It is important to raise funds to leverage grants.
- Use the plan as your platform for asking for funds. "Here is my plan, but we need help to get started." Funders are willing to get an organization get started if it looks like it can be sustainable later.
- Participating communities should contribute funds in exchange for the marketing benefits and access to trail improvement grants.
- SEAtrails needs to think about its purpose. What it trying to accomplish? It will be hard to convince people to pay dues to another organization without a clear purpose.
- Be specific about fundraising needs. People don't know if you need $100 or $10,000.
- Look for grants from the North West CruiseShip Association and the newly formed Alaska Cruise Association.

- Apply "peer pressure" between communities to increase donations.
- Solicit donations on a regional level. Showcase donors on the website and in presentations.
- Expand membership program to include multiple levels: individual, community, corporate.
- Membership adds another layer of administration. You need to chase down the members annually. You need to think about it carefully before you commit yourself to this type of revenue generation.
- Develop a "founders circle" or something similar where you target major donations from a handful of funders. For these, you need to give perpetual recognition of their donation. Examples: Bureau of Indian Affairs, foundations, major corporate sponsors.
- Make membership valuable by providing information about the bigger picture: marketing, trail developments, visitor statistics, etc. You can also provide information about SEAtrails and our surroundings that members can pass along to their employees.
- SEAtrails could offer training for front line employees on local trails, natural history, or other elements related to SEAtrails. It could be a component of the State's *AlaskaHost* program. Needs to be ongoing, as employees are continually starting during the summer.
- Sell maps to AMHS, retail shops, and guides, building in a little profit for SEAtrails in the price. Some companies provide a souvenir map for their clients, so they would be less likely to participate in this program.
- Sell advertising on the maps, then provide maps for free or a nominal fee to provide exposure for advertisers.
- When targeting small businesses for advertising opportunities, rates should be in the $50 to $250 range. Marketing budgets are typically small in this type of industry.
- Increase retail offerings. Sell regionally produced products like chocolates and artwork.
- Add the word "Alaska" to the SEAtrails logo items to boost appeal and sales. Sell it wholesale to existing retail shops and guides.
- Sell links from SEAtrails website.
- Tap into commercial user fees collected by US Forest Service and other land management agencies.
- How can you expand trail user fees from commercial users? If you demonstrated increased usage, you might be able to secure funds from US Forest Service and National Park Service.
- If bed and sales tax increases were linked to visitor industry activity, you could make a case for municipal funding.
- SEAtrails needs an initial funding source to get going on the marketing and business plan, even if the organization pursues small ways to generate funds.
- Explore bank grants and other corporate donations.
- Communities vary considerably in their ability to contribute. This should not be a requirement for participation in SEAtrails.
- Communities should all have the same benefits.
- Secure grant funding for providing ADA-accessible trails.

- Limit the amount of funding that is allocated to administration by committing to specific percentages that will go to marketing and trail development. Southeast Alaska Tourism Council did something like a 15 percent on admin.
- Develop a speakers bureau and charge a nominal fee ($25 to $50) for presentations on trails.
- Seek a grant from the US Forest Service to promote the cabins. Include photos, locations, and booking information.
- Provide clear marketing value for membership. Example: Sitka Chamber offers advertising credit for members.
- Develop a tour product and retail it to visitors. (Sitka Trail Works example.)
- Stay away from directly offering a tour product. You would be competing directly with the businesses that you want to partner with. Instead, help educate businesses and help them market.
- Build SEAtrails into educational talk given to visitors to attract members that want to support the mission, but may not return to hike. (Raptor Center example.) Develop an email database and stay in touch with members.
- Pursue funding from Outdoor Recreation Trail Advisory Board (ORTAB), an outdoor recreation board that may fund administrative activities. Sitka Trail Works is aware of this group. (www.dnr.state.ak.us/parks/misc/ortaboard.htm)
- Sponsor regional events like a triathalon or a series of 10k runs. You could have people travel by ferry and complete the run in each port stop. Fundraising activity and a media event.
- Coordinate rental/loan of bear-proof containers. Get business sponsors to pay for the program.
- Coordinate a raffle or auction, using donated transportation and travel products.
- Bring in money by selling links on the website. $200 is reasonable.
- As a business owner, the idea of purchasing an ad on the website is more appealing than a membership system.

Trails and Regional Travel
- Need to develop itineraries that create interest in traveling in the region. Must have logistical information like time/distance.
- SEAtrails is really offering a network of starting and ending points, rather than a single trail like the Pacific Crest Trail.
- It is important to have communities involved in the trail nomination process.
- Communities need to revisit the trails they originally nominated.
- Make sure that communities have the Trail Assessment Form.
- Is rafting considered part of SEAtrails?
- Does SEAtrails include all-terrain vehicles (ATVs)?
- Provide information on trams, zip-lines, and canopy trails.
- Need to provide a link between communities and beach heads for kayakers. It makes sense to construct access points and camping sites.
- Need to add kayak storage on the ferries.

- Ferry travel is sketchy because of the limited service to some communities and high cost. There has been a precipitous drop in regional traffic.
- Has SEAtrails considered snowboarding and heli-skiing? Some areas in the region are outstanding.
- Increase awareness of the regional marine parks. Some of these do not require "extreme" skills to be accessed.
- Increase promotion of dive trails.
- Alaska Airlines is a critical partner. Can they create vacation packages for SEAtrails? Can you do something with the mileage plan promotion?
- Maps should be in two formats: topographical maps that have the technical information and a more simplified version for the more casual trail user.
- Tell visitors about local search and rescue organizations, where to get current trail terrain and condition information, and updated weather.
- SEAtrails can help connect the dots for visitors with signage and visitor information.
- There is little inter-agency connection. SEAtrails can help convey the history and opportunity on a regional level.
- Incorporate "geo-caching" and SEAtrails. (A GPS-based scavenger hunt.)
- Need to provide safety information—especially about bears.
- Be sure that visitors know about shelters, not just cabins.
- Need to continually get the word out that people are on the Tongass—their public lands.
- SEAtrails needs to better assess which trails are appropriate to include. Some trails are barely used by residents, and are therefore not necessarily safe for visitors.
- SEAtrails should sponsor a triathlon for Northern POW/Wrangell/Petersburg.
- People are more interested in soft adventure and shorter trips than in the past.
- The European market is growing in Southeast. They like to rent cars. There should be an itinerary where people can rent a car in Ketchikan, go to Wrangell and POW, and drop the car off.
- Bear viewing sites (such as in Hyder) should be included in SEAtrails.

Community-Specific Comments

Juneau:
- A trail at Mendenhall Glacier should be included in SEAtrails (East or West Glacier Trails, Moraine Ecology Trail).

Ketchikan:
- SEAtrails should market to the Ketchikan women's trail organization.

Petersburg:
- Petersburg has a lack of tent camping available. Can SEAtrails help? A grant for the Tent City campground would be ideal.
- There needs to be a link to the Petersburg kayak route map on the SEAtrails website.
- Petersburg needs a kiosk at the ferry terminal.
- SEAtrails needs to increase its visibility in Petersburg, maybe hold a community meeting to inform residents.

Prince of Wales Island:

- The Honker Lake Divide trail should not be a SEAtrail. Residents barely use it; we should not be telling visitors to use it if we barely use it ourselves. There is nowhere to rent canoes in order to do the trail.
- There is a strong desire on POW to expand to non-consumptive (not hunting or fishing) tourism. However, there is limited infrastructure – nowhere to rent kayaks or bikes, no whale watching company.
- There is resistance in Klawock to non-resident use of certain trails.
- More RV-ers and families are coming to Prince of Wales Island. They need more activities.

Sitka:

- Tie into Maritime Heritage and Japonski Island.
- Access administrative and marketing funds from the Community Development Fund.
- Sitka has developed a concept for launching and storing kayaks. Need to secure construction funding.
- Agencies looking at development of a coastal trail that honors historical Tlingit "survival trail" to Hannis Bay. Considering shelters, as they are less expensive than cabins.
- New State Park causeway has WWII history, camping sites, and very good access.

Skagway:

- Some concern noted about safety of kayak route between Skagway and Haines. Replace that with Long Bay kayak route?
- Increase awareness of Dyea—not just Skagway.
- Increased recreation in the West Creek area.

Contact List

Meetings and interviews were held with the following individuals.

Haines

Thom Ely, Owner, Sockeye Cycle (company also operates in Skagway)
Karen Hess, President, Haines Chamber of Commerce
Greg Schlachter, Owner, The Expedition Broker (also Haines Chamber Board of Directors, Parks and Recreation Advisory Board Member)
Lori Stepansky, Director, Haines Convention and Visitors Bureau
Robert Venables, Borough Manager, Haines Borough

Juneau

Mike Eberhardt, Southeast Park Superintendent, Alaska State Parks
Butch Carver, General Manager, Alaska Discovery Wilderness Adventures
Karla Hart, Watchable Wildlife Coordinator, Fish and Game
Lorene Palmer, President & CEO, Juneau Convention and Visitors Bureau
Jeremy Geiser, Manager, Gastineau Guiding Company

George Schaaf, Executive Director, Trail Mix
Aneta Synan, State Byways Coordinator, Alaska Department of Transportation & Public Facilities
Robert Rehfeld, Elgee Rehfeld Mertz CPAs

Ketchikan

Patti Mackey, Executive Director, Ketchikan Visitor Bureau (also Alaska Travel Industry Association President and Southeast Alaska Tourism Council President)
Wanda Vandergriff, Ketchikan Reservation Center
Vern Craig, Marketing Manager, Alaska Marine Highway System
Peter Rice, former board member of State of Alaska Trail Board and Ketchikan Trail Coalition
Greg Thomas, Southeast Sea Kayaks
Len Laurence, Mariner Marketing

Petersburg

Liz Cabrera, Coordinator, Petersburg Economic Development Council
David Berg, Viking Travel
Leo Luczak, Director of Community Development, City of Petersburg
Katy O'Rear, Interim City Manager, City of Petersburg
Ryan MacFarland, Parks and Recreation Manager, City of Petersburg; Chamber of Commerce
Carin Christensen, Petersburg Ranger District, US Forest Service
Brad Hunter, Recreation and Wilderness, Petersburg Ranger District, US Forest Service
Joe Teter, Staff Officer, Petersburg Ranger District, US Forest Service
Scott Roeberge, Owner, Tongass Kayaks

Prince of Wales Island

Dennis Benson, Craig and Thorne Bay Ranger District Recreation Officer, US Forest Service
Chuck McGee, City Administrator, Coffman Cove
Elaine Price, City Clerk, Coffman Cove
John Bruns, Board Member, Prince of Wales Chamber of Commerce
Denise Daniels, Office Manager, Prince of Wales Chamber of Commerce
Jan Bush, President, Prince of Wales Chamber of Commerce
Bruce Jones, General Manager, Inter-Island Ferry Authority (Craig)
Victoria Merritt, City of Craig Parks and Recreation
John Bolling, City Administrator, Craig

Sitka

Davey Lubin, Marine Wildlife Tours & Coastal Transport
Carol Goularte, District Ranger, Sitka Ranger District, USDA Forest Service
Jon Martin, Staff Officer for Recreation, Lands, Minerals, and Heritage, US Forest Service
Greg Dudgeon, Superintendent Sitka National Historical Park, National Park Service
Camille Ferguson, Economic Development Director, Sitka Tribal Enterprises
Michelle Gundaker, Island Fever Diving and Adventure Tours

John Stein, Municipal Administrator, City and Borough of Sitka

Lynne McGowan, Parks and Recreation, City and Borough of Sitka

John Dunlap, Vice President, Allen Marine

Sherry Aitken, Sales and Service Manager, Allen Marine

Sandy Lorrigan, Executive Director, Sitka Convention and Visitors Bureau

Andrea Keikkala, Executive Director, Greater Sitka Chamber of Commerce

Jeff Budd, Guide (former owner of Sitka Hike & Bike)

Karen Smith, SEAtrails Vista Coordinator

Deborah Lyons, Executive Director, Sitka Trail Works

Skagway

Tom Cochran, Borough Mayor, Municipality of Skagway

Mike Korsmo, Borough Assembly Member, Municipality of Skagway (also Parks and Recreation Advisory Board Member)

Kathy Hosford, Chilkoot Trail Outpost

Wrangell

Kim Covalt, Parks and Recreation

Jim Leslie, Alaska Waters, Inc.

Eric Yancey, Breakaway Adventures

Dave Sweat, Klondike Bike

Carol Rushmore, Economic Development, City of Wrangell

Keith Appleman, Wrangell Ranger District

John Verhay, Alaska Vistas and Stikine Wilderness Adventures

Other Contacts

Scott Habberstad, Manager Regional Sales, Alaska Airlines
Andrew Ogilvie, Senior Account Executive, Alaska Airlines

Case Studies

Introduction

Three trail organizations were selected as case studies for SEAtrails: Pacific Crest Trail Organization, the Appalachian Trail Conservancy, and Island Trails (of Prince Edward Island). All three case study organizations are helpful to SEAtrails as it develops a stronger website and organizational structure. Brief profiles are provided on four additional trail organizations whose websites offer interesting options for users, including trail user forums, trail searches, advertising by local outfitters, and online membership purchasing.

Implications for SEAtrails

- The first two organizations profiled, Pacific Crest Trail Association and Appalachian Trail Conservancy, represent long-established, multi-state trail systems with a high level of recognition among adventure travelers, both nationwide and worldwide. Their annual operating budgets are in the millions of dollars. These organizations are useful models for SEAtrails' longer-term outlook.

- Both PCTA and ATA rely on memberships for significant portions of their operating budgets.

- The PCTA and ATA websites are highly developed and sophisticated, in keeping with their wide reach. They include the following services, which SEAtrails may consider developing as it grows:

  - User-generated content, including trail condition updates, trail journals, and links to personal trail blogs
  - Ability to renew a membership and donate online
  - News, press releases, and events calendars
  - Online stores that sells items such as guidebooks, videos, coffee mugs, and t-shirts.

- Several key differences are important for SEAtrails to keep in mind as they consider the two larger organizations:

  - PCTA and ATA have little need to market themselves to travelers in the way that SEAtrails does: the trails are easily accessible from major population centers along both coasts.

  - PCTA and ATA are much more focused than SEAtrails is on conservation and preservation, with a considerable amount of resources directed towards these goals. With its focus on economic development and visitor growth, SEAtrails should also look to destination marketing organizations as models for marketing and business activities.

- The third organization selected, Island Trails of Prince Edward Island, shares more in common with SEAtrails. They have a much smaller (and somewhat unstable) budget, and they participate in marketing efforts to attract outside visitors.

Findings

Pacific Crest Trail Association (www.pcta.org)

Overview

The Pacific Crest Trail (PCT) is a 2,650-mile national scenic trail linking Mexico with Canada through California, Oregon and Washington. Although some users attempt to do the entire course of the PCT, most users cover only short distances of the trail at any one time. There are five distinct sections: Southern California, Central California, Northern California, Oregon and Washington. The PCT traverses three national monuments, seven national parks, 24 national forests, and 33 federally mandated wildernesses. The trail is open to foot and horse (or other pack stock) travel only.

Founded in 1997, the Pacific Crest Trail Association (PCTA) is a membership organization formed as a nonprofit public benefit corporation and is recognized as a charitable and educational organization under the Internal Revenue Code Section 501(c)3. The organization has an annual operating budget of roughly $1.3 million, nearly half of which comes from individual membership dues. Much of the remainder comes from Forest Service contributions. The PCTA is the government's major partner in the operation of the trail. Its mission is to protect, preserve, and promote the Pacific Crest National Scenic Trail as an internationally significant resource for the enjoyment of hikers and equestrians, and for the value that wild and scenic lands provide to all people.

Partnerships and Access

The PCTA has Memorandums of Understanding with the Forest Service, the National Park Service, and the Bureau of Land Management. The PCT has been designated as a non-mechanized trail by the U.S. Forest Service (the agency responsible for management of the trail). Permits are required in all wilderness areas, National Parks, and other restricted areas along the trail. Users obtain a permit from the agency on which their PCT trip originates. The PCTA issues wilderness permits for trips of 500 miles or more along the PCT. Partnerships with other trail associations are also important linkages used by PCTA in their efforts to promote the PCT.

Structure

There are 11 paid staff, two long-term contractors, and 12 volunteer board members. PCTA organizes volunteer trail maintenance and provides a toll-free telephone help line for trail condition reports. Staff is available during business hours to assist trail users in planning their trip.

Membership

There are over 6,000 members of the PCTA. Membership is coordinated by the PCTA Development Director and benefits include: a subscription to Pacific Crest Trail Communicator magazine; a free wilderness permit for travel in excess of 500 miles on the PCT; discounts on all PCTA activities and store items; and an invitation to trail projects and trail classes. There are several levels of membership, with different benefits associated with each: Trail Guide ($35), Trail Advocate ($50), Trail Partner ($100), Trail Builder ($500), and Trail Guardian ($1,000). Members contributing $500 or more also receive a set of

note cards with trail photos, and members contributing $1,000 or more receive a framed photograph. Those donating over $250 to PCTA generally receive more contact and attention from the organization to recognize their significant contribution.

Marketing

Currently, PCTA's marketing efforts are relatively ad hoc, taking advantage of local and regional events and programs to promote the trail and the organization. As part of their 2007-2009 strategic plan, the organization would like to adopt a more formal marketing plan and possibly create a position focused primarily on marketing. In addition to their website, the PCTA distributes a bi-monthly magazine called the *Pacific Crest Trail Communicator*. Some ad sales are included in the magazine, but their nonprofit designation prohibits the organization from selling any amount of ad space that would make the magazine a profitable publication.

Although the PCTA currently does little active marketing, much of their external promotion results from their partnerships with other trail associations in the West, such as the Washington Trail Association, Mount Shasta Trail Association, and Chico Hiking Association.

Website

The PCTA website (www.pcta.org) offers a wide array of information and services, including: trail maps, trail condition updates, events calendar, news and press releases, photo gallery, and trail journals. The website allows users to join the PCTA, renew a membership, and donate online. Website users can submit their own trail journals and links to personal trail blogs. Users can also submit trail condition reports. The website has an online store that sells PCT-related items such as guidebooks, videos, coffee mugs, and t-shirts.

The PCTA website does not advertise guides, outfitters, hotels, or any other private businesses.

Appalachian Trail Conservancy (www.appalachiantrail.org)

Overview

The Appalachian Trail (AT) was the county's first nationally designated scenic trail, recognized in 1968, although it was officially completed and protected by the U.S government as trailway 30 years prior. Stretching over 2,175 miles of the East Coast from Maine to Georgia, the AT touches 14 states, crosses six national parks, and traverses eight national forests. An estimated three to four million visitors hike a portion of the AT each year. Most of these hikers cover relatively short distances, spending a day or a few days on the trail. In contrast, 387 hikers were reported to have completed in the entire Appalachian Trail in one continuous trip in 2006. Generally speaking, the trail is open to foot travel only.

Known as the Appalachian Trail Conference until 2005, the now-termed Appalachian Trail Conservancy (ATC) was founded by hikers, foresters, and public officials in 1925. It is a private, nonprofit, volunteer-based organization whose mission is to protect and promote the Appalachian Trail experience. ATC's 2006 operational budget was $6.1 million. Sources of revenue for 2006 include: contractual services (31 percent), public contributions (24 percent), membership (22 percent), sales (17 percent), in-kind

contributions (1 percent), net investment income (1 percent), and other sources (4 percent). The ATC executes its mission through five central programs: trail protection, trail stewardship, information and education, membership services and development, and administration.

Partnerships and Access

The ATC partners with a number of public and private organizations, including the National Park Service, the USDA Forest Service, various state agencies and parks, and 30 local trail-maintaining clubs. A nine-person staff within the National Park Service, the Appalachian Trail Park Office, was set up to focus solely on issues pertaining to the AT. Permits are needed for some of the national and state parks, and others simply require on-site self-registration. In some locations a campsite fee is charged as well. The trail is generally for foot traffic only; dogs are allowed on most of the trail if they remain under their owner's control at all times. Three of the state parks along the trail do not permit dogs. Additionally, in the few areas where the trail coincides with paved paths or roads, bicycles are allowed. Hunting is permitted along more than half of the AT. Hunters must abide by each state's laws on licenses, registration, and other firearm regulations.

Structure

Under the supervision of the Executive Director, over 45 year-round, paid staff work in four regional offices to implement the ATC's five trail management and protection programs. Roughly half of the staff work in the field on trail conservation and grant research, while the other half work in the following departments: membership, marketing, finance and administration, and publications. A board of 15 elected members, including the Executive Director, gives the organization direction, oversees finances and administration, and sets policies related to the organization's mission. ATC coordinates with 30 trail-maintaining clubs for maintenance, and staff are available during business hours to help trail users plan their trip.

Membership

There are 3,500 ATC members as of 2007. Membership benefits include: a subscription to *AT Journeys: The Magazine of the Appalachian Trail Conservancy*, discounts at the ATC's online store, an ATC decal and patch, and an ATC member card. Membership levels include: $30, $50, $75, and $100, as well as options for larger donations.

Marketing

During their renaming and re-branding efforts in 2005, the ATC hired a private marketing firm to design a new logo, website, and other marketing materials. This was a short-term effort, not a continued campaign. More routinely, the ATC relies heavily on the membership, publications, and outreach efforts of its 30 trail-maintaining club partnerships, as well as the Appalachian Trail Park Office. Changing course from past promotional efforts, the ATC is focusing its marketing on the organization rather than the trail itself in attempts to attract trail users who will offer financial support to the organization. The ATC has a five-person marketing department, including visitor center staff, with an annual budget of roughly $500,000.

External marketing efforts include publicity in visitor guides produced by the various states containing parts of the trail; promotion by the Appalachia Regional Commission, which partnered with National Geographic on trail guides; and a partnership between a regional travel association and AAA focusing on trail tourism on a state level.

Website

The ATC website (www.appalachiantrail.org) offers a wide array of information and services, including: trail maps and planning assistance, trail condition updates and alerts, trail user statistics, historical information, news and press releases, and links to AT- and hiking-related websites. On the ATC website, users can join the ATC, renew a membership, and donate online. Website users also submit trail condition reports. The website has an online store that sells ATC-related items such as guidebooks, apparel, gear, and souvenirs such as patches.

The ATC website does not advertise guides, outfitters, hotels, or any other private businesses.

Island Trails (www.islandtrails.org)

Overview

Island Trails is a nonprofit organization that develops, maintains, and promotes the extensive trail network of Prince Edward Island (PEI), located on the east coast of Canada. Incorporated in 1990 under the former name, Rails-to-Trails PEI, Island Trails spent the past 17 years converting the divested rail lines of the island to a network of trails for hikers and bicyclists. This local effort has coincided with a nation-wide effort to connect Canada from coast-to-coast with converted rail lines.

The 250-mile trail network consists of the Confederation Trail, a mainline trail covering the island tip-to-tip, with spur trails extending off the mainline. Individual spur trails range from under a mile to over 10 miles and are rated according to difficulty. The organization also coordinates events highlighting trail use in conjunction with area sponsors.

Partnerships and Access

Island Trails and the PEI provincial government have separate and distinct mandates for their respective roles regarding the Confederation Trail. The government is responsible for maintenance and marketing of the trail system, and Island Trails serves as a trail information center, volunteer and event coordinator, and local liaison for the trail. Additional partnerships exist through the organization's board of directors. Board members represent tourism organizations, government agencies, and national trail groups.

PEI's Department of Transportation and Public Works spends $1.2 million (Canadian) annually on trail maintenance, including one full-time staff person devoted to the Trail. The Department of Tourism is responsible for marketing and safety of the Confederation Trail with an annual marketing budget of $100,000. This budget includes $20,000 that has been given to Island Trails in recent years to coordinate the Island Trails' safety patrol program. Marketing efforts are not coordinated between the provincial government and Island Trails.

Access to the Confederation Trail system is free of charge, and use of motorized vehicles is prohibited (with the exception of motorized bicycles and wheelchairs). It has been a challenge for trail safety patrols to enforce this rule (particularly with regard to ATVs and dirt bikes).

Structure

Island Trails has a 14-member board of directors representing key supporters and user groups, such as the Tourism Industry Association, various recreational associations, PEI provincial government, the Trans Canada Trail Foundation, and the Canadian Trail Federation. There is one full-time staff member whose salary is funded by the provincial government six months out of the year and works as a full-time volunteer during the remaining six months. This position is mainly responsible for event coordination. Other operational duties, such as membership coordination, communications, finances, etc., are handled by volunteers. Additionally, volunteers are recruited for trail maintenance, trail patrols, to report existing plant and wildlife species, and to help with community events.

Membership

Membership is estimated at 400-500. Membership dues provide the main source of revenue to the nonprofit organization. Sales from the online gift shop add a relatively small amount to Island Trails' annual revenues. There are several types of Island Trails membership: Individual ($10), Family ($20), Explorer ($125), Trail Blazer ($250), and Pathfinder ($500). There is also a community and organization membership for $25.

Marketing

Island Trails promotes the trail system and its own organization mainly to the local population through its organized cycling events (25 in 2006) and website.

Official marketing of the Confederation Trail system is handled by the PEI Department of Tourism. With an annual budget of $100,000, the Department of Tourism (Parks Division) includes the trail system in all of its marketing literature, including the PEI Visitors Guide and a hard cover trail-focused book that provides information on accommodations, restaurants, activities, and cycling-related services. Canada and the US is their main market for these publications, but the Department of Tourism website has a wider reach. Eventually, the trail-focused guide will be available on their website. The Department of Tourism has also tried to specifically attract guided tour operators from northern New England, but has found this effort less successful.

Website

The Island Trails website (www.islandtrails.org) includes the following information and services: trail descriptions, visitor and event information, news and press releases, photo gallery, and guestbook. The website also allows users to become an Island Trails member, renew a membership, and donate online. An online store sells branded apparel, such as shirts, windbreakers, and ball caps.

The Island Trails website does not advertise guides, outfitters, hotels, or any other private businesses, but it does offer a link to the *PEI Visitors Guide*, produced by the PEI Department of Tourism.

Other Trail Organizations

Cleveland Area Mountain Bike Association (www.camba.us)

CAMBA is a non-profit organization that encourages sustainable, low-impact mountain bike riding; encourages volunteer trail work participation; and promotes cooperation among different trail user groups. They work with land managers and park officials to gain access to trails, and organize group rides. The website has a popular discussion forum where trail users ask questions, hook up with other riders, and report on their experiences. The website has an online store, offers online membership purchase, and promotes sponsors' logos and affiliated retailers.

Noquemanon Trail Network (www.noquetrails.org)

The Noquemanon Trail Network is a non-profit organization dedicated to developing, maintaining, signing and mapping a non-motorized water and land trail network throughout Marquette and Alger Counties in Michigan's Upper Peninsula. Their trails include 125 kilometers of groomed cross-country ski trails and 100 miles of mountain bike and hiking trails. Memberships start at $25; depending on the level of membership, benefits include discounts at coffee shops, restaurants, and bicycle shops. The website advertises local gear shops and lodges. A major focus of the website is events such as ski swaps, races, and fundraisers. Links to private businesses, such as vacation retreats, are also featured on the website.

Waymarked Ways of Ireland (www.walkireland.ie)

This website is operated by the National Trails Office, part of the Irish Sports Council. It was developed as part of the Irish Trails Strategy, launched in January 2007, with a goal of sustainable development of a diverse recreational trails network in Ireland. There are about 30 "waymarked ways" covered on the website, divided into four geographical areas. The website includes interactive trail maps, a trails grading system, photo gallery, event calendar, and newsletters. There is no advertising on the website, but it does contain links to other sites where you can buy trail maps. As a governmental organization (under the Department of Arts, Sports and Tourism), the National Trails Office does not solicit memberships from the public.

Texas Trails Network (www.texastrails.org)

Established in 1992, the Texas Trails Network (TTN) is a non-profit organization established to promote quality development and management of trails; provide a forum to address concerns related to trail acquisition, development, management, and user conflicts; and to promote the development of a statewide trails system network. The website includes an events calendar, newsletter, and online registration. Although the site is not extensive, it does provide a unique service: a "trail search" where the user can enter in various preferences (type of activity, difficulty level, county, accessibility, etc.) and the website will search for all trails meeting your criteria. This serviced is provided by Google Maps. There is also a "member portal" area where users can log on and share their trail events and experiences. Additionally, links to recent conference sponsors are featured on the website.

SEAtrails Business and Marketing Plan: Supporting Research

Introduction

Following are selections from four different studies of Alaska destination websites: an online survey of travelalaska.com users; an analysis of the *North to Alaska* website based on focus group and survey research; a comparative analysis of travelalaska.com alongside selected destination websites; and a study of potential visitors' Alaska travel images and motives. These studies provide useful information for SEAtrails as its website is upgraded.

Implications for SEAtrails

- The survey of travelalaska.com shows that the number one route to their website was search engines. This underscores the importance of SEAtrails maximizing its search engine visibility, and making sure this visibility is consistent over time.

- The survey demonstrates the importance of links on other websites, mentioned by 15 percent of respondents as the way they accessed travelalaska.com. Making sure that all of SEAtrails' partners have links to its website will be an essential tool in increasing usage.

- The survey also shows that only 6 percent of users typed in the URL from a print advertisement, and only 4 percent linked to the site from an online advertisement. These promotional tools are probably not the best use of SEAtrails' resources.

- With a significant portion of online travel researchers planning travel for an unknown future date, or far into the future, SEAtrails website content should include compelling content that makes the visitor want to travel immediately.

- The focus group study underscores the importance of providing very specific information on the SEAtrails website: exact distances and estimated travel time between communities, detailed information on available services and lodging in communities, and detailed, printable maps. Sample itineraries were also suggested, and should be incorporated into the SEAtrails website. Finally, the importance of quality photos – preferably with captions – was emphasized in this study.

- The competitive analysis contained a number of recommendations relevant to SEAtrails. These included: testimonials from travelers, sample itineraries, quality photos (photo gallery), minimum number of categories with simple labels, easy to read and navigate, welcome message, links for more information (CVB's, for example), and allow for e-newsletter sign-up (build mailing list).

- The national phone survey of potential visitors advises marketers to emphasize Alaska's scenery, wildlife, parks, museums, and dining opportunities. The text and images utilized on SEAtrails' website should reinforce the fact that visitors have exceptional opportunities to experience these elements while visiting the trails and communities of Southeast Alaska.

Findings

TravelAlaska.com User Survey

The following table summarizes results from a survey of www.travelalaska.com users. The Alaska Travel Industry Association (ATIA), which owns the website, conducts this study periodically through GMA Research. Over 5,000 website users responded in this 2006 survey.

The number one method of accessing travelalaska.com was through a search engine, mentioned by over a third of respondents. One-quarter accessed the website through an email message or newsletter. The third most common method was a link from another website or web channel.

While respondents were most likely to be planning a trip for the following year (35 percent), a significant portion were planning over a year in advance (18 percent), or were unsure of when they would visit (39 percent).

Survey of www.TravelAlaska.com Website Users

	% of Total
Method of Accessing TravelAlaska.com	
Linked from a search engine result	35%
Linked from an email message or newsletter	26
Linked from another website or web channel	15
Typed in website address found in a magazine, newspaper or on a TV ad	6
Linked from an online advertisement	4
Friend/co-worker	2
Other	11
Don't know	2
Alaska Trip Planning Status	
Plan to visit in 2006	35%
Plan to visit in 2007	18
Likely to visit in next 3 years, but don't know when	25
Likely to visit someday, but don't know when	14
Haven't decided	4
Other	4

North To Alaska Website Focus Groups

The following information was summarized from the report *North To Alaska Website Usability Focus Groups*, prepared for ALASKA TRAVEL INDUSTRY ASSOCIATION by GMA Research Corporation. The information was gathered from two focus groups and a survey of regular Internet users who were interested in taking a driving vacation through Canada and into Alaska. With nearly one-third of the Southeast Alaska non-cruise marketing entering or existing Alaska by highway and ferry, these findings reflect the opinions of potential SEAtrails users.

Focus group and survey participants made several suggestions on how the North to Alaska website could better serve people planning a driving vacation to Alaska.

- Provide driving distances/mileage.
- Provide average driving times.
- Provide printing capability on the website including for maps.
- Show more pictures on the website.
- Have captions under the pictures.
- Include itineraries; people want to know where they can go and what they can see and do on a 7-day, 10-day, 20-day, 30-day trip.
- Provide more specific information on campgrounds, RV parks, available gas stations and lodging along the listed routes.
- Provide better and bigger individual maps for each route on the website.
- Provide a way in which people can customize their routes or find alternate routes.
- Include information or links on cities/towns that may not be along the listed routes but are nearby.
- Provide more links to sites that would have more detailed information on any trip-related issues not covered in the website.

Alaska Travel Industry Assocation Competitive Website Analysis

The following selections are excerpted from the report *Competitive Website Analysis*, prepared for Alaska Travel Industry Association by GMA Research Corporation. The study team reviewed the websites of a number of destinations (Australia, Germany, Britain, California, Texas, Washington, Minnesota, North Carolina, Colorado, and British Columbia) and compared them to www.travelalaska.com. The study's conclusions include many findings relative to SEAtrails and its website.

At this point in time, using the Internet to plan your own travel is experiencing a sort of transition phase. More and more people are using the Internet everyday as their primary means of researching and arranging vacation travel. However, many travelers, especially seniors, have always used travel agents to make recommendations and arrange all of the travel for them, and are therefore less Internet savvy and new to the experience. Each type of traveler has different wants and preferences and therefore it can be a tremendous challenge to develop a website that meets the needs of every type of visitor.

Despite the fact that do-it-yourself travel is relatively new and encompasses a wide range of travelers, generally accepted marketing techniques can and should be applied when developing and maintaining a website. Some of the techniques and strategies to consider are:

- *Develop a clearly defined mission. Is the website designed to be only a resource to motivate the visitor to come to the destination, or it is an all-encompassing site designed to research, plan and purchase travel arrangements?*

- *Welcome the visitor and make them feel comfortable, important and valued. The site should engage and interact with the visitor. Invite them back and let them know they are welcome anytime.*

- *Understand the visitors' needs and listen to their feedback.*

- *Demonstrate a willingness to help the visitor and offer sufficient help functions and guidance.*

- *Provide enough content, resources and tools for the visitor to get what they need.*

- *Design the site to be easy to read and understand through the use of simple and logical menus choices, labels and links.*

- *Make visiting the site a pleasing experience by using effective use of photographs, color and fonts.*

- *Provide the necessary tools and resources to allow the visitor to customize their experience.*

- *Utilize effective navigation tools and search functionality so that the visitor can find what they need quickly and efficiently.*

- *Adequately maintain the site so that it is free of broken links and error messages.*

- *Dedicate adequate bandwidth and resources to ensure that pages load quickly and that graphics and multimedia presentations are optimized for easy web viewing.*

Summary of Best Practices

Following is a summary of best practices that competitive websites utilize that can be very effective at marketing a destination.

Homepage

- *Some sites utilize flash technology that changes the photographs on the homepage every few seconds, which can enhance visual appeal and increase interest.*

- *The sites that have relatively few main categories have a clean look and feel.*

- *The use of drop-down or mouse-over menus can minimize the time it takes to find specific information and help the visitor identify where to get started.*

- *The use of easy to read fonts greatly enhances visual appeal.*

- *Labels that are easy to understand and reflective of the content can enhance navigation and site organization.*

- *The effective use of "official site" wording and branding statements can instill credibility and trust.*

- *A well-written welcome message can set the tone for the site to help make the visitor feel comfortable.*

Content and Resources

- *Providing specific content that is tailored to the most popular activities at the destination enhances personalization.*

- *The use of interactive video tours, 360-degree photo galleries and testimonials from actual travelers can increase interest in the destination.*

- *Including a wide assortment of sample trips and unique vacation ideas complete with cost estimates can turn interest into conversations.*

- *Offering visitor guides that can be viewed digitally online or downloaded directly provide instant access to information.*

- *Sites that offer the ability to purchase travel arrangements directly on the site can make it much easier to plan and execute a vacation.*

- *Sites that offer a wide selection of travel specials and discounts can give the visitor a sense that they can save money and increase the likelihood of booking with members or partners.*

Site Organization and Design

- *Sites with a minimum amount of categories that have simple and descriptive labels make finding information easier for the visitor.*

- *The use of intuitive design elements and features greatly enhance personalization and overall efficiency. Sites that anticipate where the visitor will want to go next and provide related links and searches on each page require fewer clicks to find the information the visitor is most interested in. Other effective intuitive features that some sites utilize are "most popular searches" or "most viewed pages."*

- *Sites that condense the information to fit reasonably within the browser and add links to more detailed information are easier to scan.*

Overall Performance

- *Dedicating adequate bandwidth to ensure that pages load quickly can reduce the likelihood of the visitor becoming frustrated.*

- *Sites that have multimedia presentations must offer the ability to download the necessary tools and software easily.*

- *Navigation is easier on those sites that utilize mouse-over menus on all pages to allow the visitor to see the information within each category.*

- *Sites that utilize local navigation and breadcrumb trails are also easier to navigate.*

- *Offering an advanced search function enables more relevant and concise results by allowing the visitor to narrow their choices based on their specific interests or needs, ultimately saving time.*

Services

- *All of the sites offer a free travel guide, but some offer a much wider selection of guides and brochures than others. Some offer the ability to download them.*

- *One of the key elements to targeting high potential prospects is through email alerts and e-newsletters. One site in particular offers a wide range of personalized email alerts.*

- *Since some site visitors are more website savvy than others, offering a site map and comprehensive help section can increase satisfaction and minimize frustration.*
- *Many of the sites offer a toll-free phone number for those that need additional assistance. One site offers live web chat.*
- *Some sites offer the ability to print the web pages in a printer friendly format.*
- *Several sites allow the visitor to change languages.*

Images of Alaska

The *Images of Alaska* report, prepared by GMA Research Corporation for the Alaska Travel Industry Association, is based on a nationwide telephone survey of 1,000 prospective visitors to Alaska. The 2006 sample included middle-to upper-income adults who make travel decisions and have taken long-distance vacations in the last five years. "High Potential" respondents are those who said they are likely to visit Alaska in the next five years. The report is available on the ATIA website at: www.alaskatia.org/research/research.asp

The survey reveals that potential visitors to Alaska most often mention scenery and wildlife as the appealing aspects of an Alaska vacation. The report advises that "Marketing efforts should emphasize Alaska's outstanding scenery, wildlife, parks, museums, and dining opportunities. While on vacation, three-fourths or more of high potentials like to view outstanding scenery (91 percent), visit national and state parks (84 percent), dine out (84 percent), visit historic sites or museums (84 percent), travel independently (83 percent) and view wildlife (75 percent)."[1]

What is appealing about a vacation to Alaska?

	All Respondents	High Potential Respondents
Beautiful scenery	45%	49%
Wildlife/animals	20	24
Sights/attractions	10	11
Wilderness	8	11
New adventure/different	7	7
Hunting/fishing	7	8
Glaciers/icebergs	5	5
Unspoiled/last frontier	4	5
Vast/open spaces	3	4
Eskimos/Native Alaskans	3	4
Mt. McKinley	2	3
Inside Passage	1	2
Nothing	7	1

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[1] *Images of Alaska 2006*, prepared by GMA Research Corporation for the Alaska Travel Industry Association, September 2006.