AVSP VI – Fall/Winter 2011-12

Section V: International Visitors

Introduction

This section presents survey results for international visitors as well as Japanese visitors (the only international market with a sufficient sample size for analysis). The following table shows each market's sample size and maximum margin of error.

As the table below shows, Japanese respondents represent the majority of international respondents in terms of sample size (129 out of 169). However, once the survey data is weighted by visitor volume, Japanese visitors only represent 40 percent of the international market. The over-sampling of Japanese visitors occurred because nearly all international air flights were Japan Air flights, and a minimum of 125 surveys was required to provide a sufficient sample size for the international air mode.

Because surveys of visitors who exited by international air are weighted down during data processing, Japanese visitors are not over-represented in either the international market or the overall visitors market data.

TABLE 5.1 – International Market Sample Sizes

Market	Sample Size	Maximum Margin of Error
Total international visitors (other than Canada)	169	±7.5%
Japanese visitors	129	8.5

International visitors represented 5.2 percent of all fall/winter visitors, for an overall estimated volume of 13,900 (out of 266,800 total fall/winter visitors).

Japanese visitors represented an estimated 5,600 visitors, based on survey results showing that 40 percent of international visitors are Japanese. This figure is corroborated by Anchorage and Fairbanks airport data, which shows that 4,632 passengers exited Alaska via Japan Air during the fall/winter period. With survey data showing that 13 percent of Japanese visitors exited Alaska via domestic air, the figure of 5,600 is a reasonable estimate.

TABLE 5.2 – International Market Volume

Market	Estimated Volume
Total international visitors (other than Canada)	13,900
Japanese visitors	5,600

The table below shows all international countries mentioned by survey respondents. Small sample sizes prevent estimating market sizes in terms of overall volume.

TABLE 5.3 - Additional International Countries with Number of Survey Responses

EUROPE (24)	**ASIA (135)**
United Kingdom (5)	Japan (129)
Germany (5)	Taiwan (4)
Italy (3)	China (1)
Norway (2)	Korea (1)
France (2)	
Switzerland (1)	Australia (6)
Austria (1)	
Belgium (1)	**LATIN AMERICA (4)**
Denmark (1)	Brazil (2)
Russia (1)	Mexico (1)
Poland (1)	Peru (1)
Czech Republic (1)	

Trip Purpose

The most frequently cited trip purpose for international visitors was vacation/pleasure, at 62 percent of total international visitors and 91 percent of the Japanese market. Among total fall/winter visitors, those traveling for vacation/pleasure were just 13 percent.

Among international visitors, those traveling to visit friends and relatives (VFRs) and those traveling for business (17 percent and 16 percent, respectively) were much higher than the Japanese international market alone (2 percent and 6 percent, respectively).

TABLE 5.4 - Trip Purpose, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Business only	43	16	6
Visiting friends/relatives	36	17	2
Vacation/pleasure	13	62	91
Business and pleasure	8	4	1

Packages

Two out of five international visitors, including four out of five Japanese visitors, purchased a multi-day travel package, compared to only 4 percent of the total fall/winter visitor market. This is attributable to the much higher rate of vacation/pleasure travelers in the international market.

TABLE 5.5- Purchase of Multi-Day Packages, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Purchased package	4	41	84
Did not purchase package	96	58	13
Don't know	<1	1	2

Northern Lights packages accounted for virtually all packages purchased by international visitors. Among the total fall/winter package market, about half purchased Northern Lights packages. (The "other" category includes skiing and boating packages.)

TABLE 5.6 – Package Type, International Visitors, 2011-12 (%)
Base: Package Visitors

	All Visitors	Int'l Visitors	Japanese
Northern lights package	53	94	100
Hunting package	13	-	-
Fishing lodge package	7	-	-
Skiing package	6	2	-
Dog sledding package	5	2	-
Rental car/RV package	5	-	-
Motorcoach tour	1	-	-
Adventure tour	1	-	-
Other	9	2	-

Virtually all packages purchased included lodging. Meals were included in eight out of ten packages among international visitors and nine out of ten Japanese visitors. Both the total international market and the Japanese market were equally as likely to have tours included in their package (91 percent each).

TABLE 5.7 – Portions of Trip Included in Package, International Visitors, 2011-12 (%)
Base: Package Visitors

	All Visitors	Int'l Visitors	Japanese
Lodging	99	99	98
Meals	74	80	93
Tours	64	91	91
Air	58	60	71
Bus/motorcoach	50	82	85
Railroad	11	19	23
Fishing	11	-	-
Vehicle/RV rental	9	1	1
Other	23	2	1

Modes of Transportation

The following table shows how visitors entered and exited the state and the mode of transportation used to travel within the state. Virtually all fall/winter international visitors entered and exited Alaska by air.

Highway was not a sampled exit mode in 2011-12; therefore it is not included below under "Used to exit Alaska." According to traffic estimates, 4 percent of all visitors exited Alaska via highway in fall/winter 2011-12. The percentage of international visitors who exited via highway is not known.

International visitors that traveled to more than one community used a variety of transportation modes including rental vehicles (19 percent), airplanes (18 percent), personal vehicles (13 percent), and train (12 percent). The Japanese market was more likely to travel via motorcoach/bus and train, where 20 percent and 19 percent, respectively, reported using these modes of transportation.

TABLE 5.8 - Transportation Modes, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Used to enter Alaska			
Air	98	97	100
Highway	1	-	-
Ferry	1	1	-
Other	<1	2	-
Used to exit Alaska			
Domestic air	97	63	13
International air	2	36	87
Ferry	1	<1	-
Used to Travel Between Communities			
Personal vehicle	17	13	-
Air	16	18	8
Rental vehicle	14	19	-
State ferry	1	2	-
Motorcoach/bus	1	8	20
Train	1	12	19
Rental RV	<1	-	-
Personal RV	<1	<1	-
Don't know/refused	1	-	-

Notes: "Other" methods of entering Alaska included private boats. The survey did not ask visitors to differentiate between domestic and international air for entry mode. Highway was not a sampled exit mode; therefore it is not listed under "Used to exit Alaska."

Length of Stay, Destinations, and Lodging

Length of Stay

International visitors reported an average length of stay in Alaska of 11.2 nights, slightly longer than that of the total fall/winter visitor market which reported 10.5 nights. The Japanese international market, however, reported a significantly shorter average length of stay in Alaska of 4.9 nights. The most common trip length for both total international visitors and Japanese visitors was four to seven nights, accounting for 55 percent and 89 percent of those markets, respectively.

TABLE 5.9 - Length of Stay in Alaska, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Three nights or less	25	7	6
Four to seven nights	37	55	89
Eight to 14 nights	21	20	2
15 to 21 nights	7	5	2
22 or more nights	10	13	-
Average number of nights	**10.5**	**11.2**	**4.9**

Lodging

International fall/winter visitors were most likely to have stayed in hotels/motels (64 percent), lodges (21 percent), and private homes (19 percent) while visiting Alaska. Nine out of ten Japanese visitors reported staying in hotel/motels and 40 percent stayed in lodges. Compared to the overall fall/winter market, international visitors were more likely to stay in lodges, and less likely to stay in private homes.

TABLE 5.10 - Lodging Types Used, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Hotel/motel	56	64	89
Private home	41	19	-
Lodge	3	21	40
B&B	2	6	-
Wilderness camping	1	2	-
Campground/RV	1	3	-
Other[1]	9	14	2

[1] Other lodging types included company-owned housing, college dormitories, and youth hostels.

Destinations

Tables in the following pages show where international visitors went in Alaska, overall (day visits and overnights combined) and overnight.

While Southcentral is the primary destination for the total fall/winter visitor market (drawing 77 percent of visitors), the Interior was more likely to attract international visitors, drawing two-thirds of the total international market and 100 percent of the Japanese international market. Southcentral was visited by 57 percent of all international visitors and 22 percent of Japanese visitors. The next most visited region was the Far North at 6 percent of the total international market and 5 percent of the Japanese market. The Southeast and Southwest regions were less likely to draw international visitors at 3 percent and 2 percent, respectively, while no Japanese visitors reported traveling to these regions.

Fairbanks was the most-visited community among fall/winter international visitors, attracting 64 percent of the total international market and 100 percent of the Japanese market. (Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.) Anchorage was the next most-visited community at 55 percent of total international visitors and 22 percent of Japanese visitors. While the Japanese market seldom reported visiting other communities, the international market as a whole reported visiting Palmer/Wasilla (13 percent), Seward (12 percent), and Denali (10 percent). Overnight visits to regions and communities were similar to overall visitation.

TABLE 5.11 - Destinations Visited (Day or Overnight) International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Southcentral	**77**	**57**	**22**
Anchorage	73	55	22
Kenai Peninsula	13	12	-
Kenai/Soldotna	7	3	-
Seward	6	12	-
Homer	3	3	-
Other Kenai Peninsula	1	1	-
Palmer/Wasilla	13	13	-
Girdwood/Alyeska	10	7	-
Portage	3	2	-
Talkeetna	3	9	-
Whittier	2	3	-
Valdez	1	3	-
Prince William Sound	<1	-	-
Other Southcentral	3	4	-
Interior	**21**	**65**	**100**
Fairbanks	19	64	100
Denali	2	10	1
Glennallen	1	1	-
Tok	1	-	-
Other Interior	3	4	1
Southeast	**10**	**3**	**-**
Juneau	5	2	-
Ketchikan	4	1	-
Sitka	2	1	-
Haines	1	1	-
Prince of Wales Island	1	-	-
Skagway	<1	<1	-
Wrangell	<1	1	-
Petersburg	<1	-	-
Glacier Bay/Gustavus	<1	-	-
Hoonah/Icy Strait Point	<1	-	-
Other Southeast	<1	-	-
Far North	**6**	**6**	**5**
Nome	2	2	-
Other Far North	4	4	5
Southwest	**5**	**2**	**-**
Kodiak	3	-	-
Other Southwest	2	2	-

Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.

TABLE 5.12 - Overnight Destinations, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Southcentral	**73**	**53**	**22**
Anchorage	63	44	22
Kenai Peninsula	8	7	-
Kenai/Soldotna	5	2	-
Seward	2	5	-
Homer	1	<1	-
Other Kenai Peninsula	1	1	-
Palmer/Wasilla	6	8	-
Girdwood/Alyeska	2	4	-
Valdez	1	3	-
Talkeetna	1	2	-
Whittier	<1	-	-
Other Southcentral	2	4	-
Interior	**20**	**65**	**100**
Fairbanks	18	63	100
Denali	1	4	-
Glennallen	1	1	-
Tok	1	-	-
Other Interior	2	2	-
Southeast	**10**	**3**	**-**
Juneau	4	2	-
Ketchikan	3	1	-
Sitka	2	-	-
Haines	1	1	-
Prince of Wales Island	1	-	-
Skagway	<1	<1	-
Wrangell	<1	1	-
Petersburg	<1	-	-
Hoonah/Icy Strait Point	<1	-	-
Glacier Bay/Gustavus	<1	-	-
Other Southeast	<1	-	-
Far North	**5**	**4**	**-**
Nome	2	2	-
Other Far North	3	2	-
Southwest	**5**	**2**	**-**
Kodiak	3	-	-
Other Southwest	2	2	-

Note: Chena Hot Springs was considered part of Fairbanks for the purposes of the survey.

Shopping was the most frequently cited activity by the total international market and by the Japanese market at 80 percent for each, compared to 55 percent of the total fall/winter visitor market. Cultural activities, specifically museum visits, were also popular with over half of international visitors (59 percent) participating in this activity, including 76 percent of Japanese visitors. The third most-popular activity was Northern Lights viewing, accounting for 54 percent of total international visitors and 84 percent of the Japanese market.

Participation rates in a number of activities were high among international visitors, particularly those of Japanese origin, likely due to the high rate of those traveling for the primary purpose of vacation/pleasure. Other popular activities among international visitors were wildlife viewing (39 percent), dog sledding (37 percent), visiting Chena Hot Springs (35 percent), city/sightseeing tours (24 percent), visiting friends and relatives (21 percent), business (20 percent), and hiking/nature walking (17 percent).

The Japanese market was more likely than the overall international visitor market to participate in many touristic activities but less likely to participate in business (6 percent) and visiting friends and relatives (2 percent). Popular activities reported by Japanese visitors were visiting Chena Hot Springs (69 percent), dog sledding (62 percent), city/sightseeing tours (46 percent), flightseeing (22 percent), wildlife viewing (19 percent), and the Alaska Railroad (16 percent).

Participation in other winter activities such as snow skiing/boarding and snowmobiling among international visitors was somewhat low compared to other activities at 8 percent for each activity.

TABLE 5.13 - Activity Participation, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Shopping	55	80	80
Business	51	20	6
Visiting friend/relatives	47	21	2
Wildlife viewing	23	39	19
Birdwatching	3	3	1
Cultural activities	17	59	76
Museums	12	53	76
Historical/cultural attractions	4	9	1
Native cultural tours/ activities	3	5	1
Gold panning/mine tour	<1	2	-
Hiking/nature walk	15	17	3
Northern Lights viewing	8	54	84
City/sightseeing tours	4	24	46
Dog sledding	4	37	62
Snow skiing/boarding	4	8	2
Snowmobiling	4	8	4
Fishing	3	5	3
Unguided fishing	2	3	-
Guided fishing	1	2	3
Chena Hot Springs	3	35	69
Shows/Alaska entertainment	3	4	-
Flightseeing	2	9	22
Day cruises	2	2	1
Hunting	2	3	-
ATV/4-wheeling	2	2	-
Tramway/gondola	1	<1	-
Camping	1	5	-
Alaska Railroad	1	11	16
Biking	1	<1	-
Kayaking/canoeing	<1	1	-
Zip-line	<1	-	-
Other	9	40	71

Compared to Expectations

When asked how well their Alaska trip had lived up to their expectations, three-quarters of both total international visitors (76 percent) and Japanese visitors (73 percent) said it was either higher or much higher than expectations. One out of five said it was about what they expected. Those citing their trip was below expectations accounted for 4 percent of total international visitors and 10 percent of Japanese visitors, while none said it was far below expectations. International visitors were more likely than the overall visitor market to rate their trip "much higher" than expectations.

TABLE 5.14 - Alaska Trip Compared to Expectations, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Much higher than expectations	21	31	40
4 - Higher than expectations	28	45	33
3 - About what you expected	49	20	18
2 - Below expectations	2	4	10
1 - Far below expectations	<1	-	-
Average 1-5	**3.7**	**4.0**	**4.0**

Note: Business only visitors were screened out of this question.

Value for the Money

When asked how Alaska compared to other destinations in terms of value for the money, the most common answer (chosen by 42 percent of total international visitors and 49 percent of Japanese visitors) was "about the same." The overall international market was more likely than the Japanese market to rate value for the money as much worse (8 percent vs. 1 percent).

TABLE 5.15 - Value for the Money
Compared with other vacation destinations visited in the past five years
International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Much better	13	11	8
4 - Better	21	29	34
3 - About the same	46	42	49
2 - Worse	18	9	9
1 - Much worse	2	8	1
Average 1-5	**3.3**	**3.3**	**3.4**

Note: Business only visitors were screened out of this question.

Satisfaction with Overall Experience

Fall/winter international visitors were generally satisfied with their overall Alaska experience, with 58 percent of total international visitors and 57 of Japanese visitors very satisfied. Additionally, another one-third of each group was satisfied (37 percent and 36 percent, respectively). Three percent of international visitors were dissatisfied or very dissatisfied. Just 1 percent of Japanese visitors were dissatisfied and none reported feeling very dissatisfied. International visitors gave similar ratings of their overall experience as the total fall/winter visitor market.

TABLE 5.16 - Satisfaction with Overall Alaska Experience International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
5 - Very satisfied	61	58	57
4 - Satisfied	38	37	36
3 - Neither/neutral	1	3	6
2 - Dissatisfied	<1	1	1
1 - Very dissatisfied	<1	2	-
Average 1-5	**4.6**	**4.5**	**4.5**

Satisfaction by Category

Categories with the highest number of very satisfied ratings among total international visitors include: friendliness of residents (73 percent very satisfied), sightseeing (57 percent), and tours and activities (50 percent). Japanese visitors were somewhat less likely to be very satisfied with various aspects of their trip. Restaurants received the lowest very satisfied ratings among total international visitors (18 percent), while shopping received the lowest very satisfied ratings among Japanese visitors (9 percent).

Dissatisfaction ranged from 0 to 16 percent for international visitors. Value for the money received the lowest ratings (16 percent dissatisfied).

Compared to the overall fall/winter market, international visitors gave fewer very satisfied ratings in several categories, including tours/activities (50 versus 58 percent), accommodations (38 versus 50 percent), wildlife viewing (43 versus 50 percent), and restaurants (18 versus 42 percent).

TABLE 5.17 - Satisfaction Ratings by Category: % "Very Satisfied" International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Friendliness of residents	66	73	54
Sightseeing	60	57	43
Tours and activities	58	50	52
Accommodations	50	38	22
Wildlife viewing	50	43	30
Visitor information services	48	42	17
Restaurants	42	18	12
Shopping	32	29	9
Value for the money	32	34	22
Transportation within Alaska	31	29	25

Note: "Don't know/does not apply" responses have been removed from the base for each category.

TABLE 5.18 - Satisfaction Ratings by Category International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Overall experience in Alaska			
5 - Very satisfied	61	58	57
4 - Satisfied	38	37	36
3 - Neither/neutral	1	3	6
2 - Dissatisfied	<1	1	1
1 - Very dissatisfied	<1	2	-
Average 1-5	**4.6**	**4.5**	**4.5**
Accommodations			
5 - Very satisfied	50	38	22
4 - Satisfied	46	41	53
3 - Neither/neutral	4	17	20
2 - Dissatisfied	1	4	5
1 - Very dissatisfied	<1	-	-
Average 1-5	**4.4**	**4.1**	**3.9**
Restaurants			
5 - Very satisfied	42	18	12
4 - Satisfied	50	52	38
3 - Neither/neutral	6	21	38
2 - Dissatisfied	2	7	10
1 - Very dissatisfied	<1	3	1
Average 1-5	**4.3**	**3.8**	**3.5**
Shopping			
5 - Very satisfied	32	29	9
4 - Satisfied	55	40	36
3 - Neither/neutral	9	28	44
2 - Dissatisfied	3	3	7
1 - Very dissatisfied	<1	1	3
Average 1-5	**4.2**	**3.9**	**3.4**
Visitor information services			
5 - Very satisfied	48	42	17
4 - Satisfied	43	37	47
3 - Neither/neutral	7	20	32
2 - Dissatisfied	2	1	2
1 - Very dissatisfied	<1	1	2
Average 1-5	**4.4**	**4.2**	**3.7**
Sightseeing			
5 - Very satisfied	60	57	43
4 - Satisfied	36	32	41
3 - Neither/neutral	3	5	11
2 - Dissatisfied	1	5	4
1 - Very dissatisfied	<1	1	2
Average 1-5	**4.6**	**4.4**	**4.2**

TABLE 5.18 - Satisfaction Ratings by Category (cont'd)
International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Tours and activities			
5 - Very satisfied	58	50	52
4 - Satisfied	37	39	34
3 - Neither/neutral	4	10	12
2 - Dissatisfied	<1	<1	1
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.5**	**4.4**	**4.4**
Wildlife viewing			
5 - Very satisfied	50	43	30
4 - Satisfied	41	37	39
3 - Neither/neutral	7	15	23
2 - Dissatisfied	2	4	8
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.4**	**4.2**	**3.9**
Transportation within Alaska			
5 - Very satisfied	31	29	25
4 - Satisfied	59	49	56
3 - Neither/neutral	6	16	16
2 - Dissatisfied	3	6	2
1 - Very dissatisfied	<1	<1	1
Average 1-5	**4.2**	**4.0**	**4.0**
Friendliness of residents			
5 - Very satisfied	66	73	54
4 - Satisfied	31	24	39
3 - Neither/neutral	2	3	7
2 - Dissatisfied	1	-	-
1 - Very dissatisfied	<1	-	-
Average 1-5	**4.6**	**4.7**	**4.5**
Value for the money			
5 - Very satisfied	32	34	22
4 - Satisfied	47	29	36
3 - Neither/neutral	14	21	33
2 - Dissatisfied	7	11	9
1 - Very dissatisfied	1	5	-
Average 1-5	**4.0**	**3.8**	**3.7**

Note: "Don't know/Does not apply" responses have been removed from the base for each question.

Recommending Alaska

Nearly two-thirds of both total international visitors (63 percent) and Japanese visitors (62 percent) said they were very likely to recommend Alaska as a vacation destination to their friends and family, while one-third of each group was likely (32 percent and 35 percent, respectively). Five percent of international visitors and 1 percent of Japanese visitors said they were unlikely or very unlikely to recommend Alaska. Likelihood of recommending Alaska was slightly lower among international visitors compared to the overall fall/winter market (63 versus 70 percent).

TABLE 5.19 - Likelihood of Recommending Alaska to Friends/Family International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Very likely	70	63	62
Likely	25	32	35
Unlikely	2	3	1
Very unlikely	<1	2	-
Don't know	2	1	2

Returning to Alaska

Two out of five international visitors and one-quarter of Japanese visitors said they were very likely to return to Alaska in the next five years. Another one-quarter of international visitors and one-third of Japanese visitors said they were likely. International visitors were much less likely than the overall market to say they would return to Alaska (38 versus 76 percent very likely).

TABLE 5.20 - Likelihood of Returning to Alaska in Next Five Years, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Very likely	76	38	25
Likely	17	24	31
Unlikely	3	12	17
Very unlikely	1	17	9
Don't know	2	10	18

Previous Alaska Travel

Three-quarters of fall/winter international visitors were on their first trip to Alaska, in sharp contrast to just one-quarter of total fall/winter visitors. Eight out of ten Japanese visitors were on their first Alaska trip.

TABLE 5.21 - Repeat Alaska Travel, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
First trip to Alaska	26	73	81
Been to Alaska before	74	27	19

Trip Planning Timeline

Fall/winter international visitors decided to come on their trip an average of 6.3 months ahead of time, while Japanese visitors made their travel decision 7.1 months in advance. Booking arrangements were made an average of 2.9 months prior to travel for total international visitors and 3.5 months prior for Japanese visitors. Not surprisingly, advance planning times among international visitors are much longer when compared to the overall fall/winter market.

TABLE 5.22 - Trip Planning Timeline, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
How far in advance did you decide to come on this trip to Alaska?			
Less than one month	39	14	6
One to three months	39	34	33
Four to six months	12	31	40
Seven to 11 months	3	7	6
One year or more	7	13	14
Don't know	<1	1	1
Average # of months	**2.9**	**6.3**	**7.1**
How far in advance did you book your major travel arrangements?			
Less than one month	47	23	8
One to three months	40	44	42
Four to six months	9	25	45
Seven to 11 months	2	6	3
One year or more	1	2	1
Don't know	1	<1	1
Average # of months	**1.7**	**2.9**	**3.5**

The most common time period for both making the decision to travel to Alaska and booking the trip was between August and October 2011. The following period (November 2011 to January 2012) was also frequently cited. International visitors were much less likely than the overall fall/winter market to either make their trip decision or book in the last three months of February to April 2012.

TABLE 5.23 - Trip Planning Timeline by Calendar Month, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Trip Decision – Top Three Periods			
Before Jan 2011	6	12	11
Feb-Apr 2011	4	7	4
May-Jul 2011	7	8	4
Aug-Oct 2011	32	42	51
Nov 2011-Jan 2012	31	22	24
Feb-Apr 2012	21	9	8
Trip Booking – Top Three Periods			
Before Jan 2011	1	4	1
Feb-Apr 2011	2	1	1
May-Jul 2011	5	5	-
Aug-Oct 2011	33	47	56
Nov 2011-Jan 2012	35	29	29
Feb-Apr 2012	24	14	14

Internet Usage

Eight out of ten fall/winter international visitors used the internet to plan their trip, including two-thirds of Japanese visitors. More than half of total international visitors and one-fourth of Japanese visitors booked at least one component of their trip online. International visitors were much less likely to book online compared to the overall market (55 versus 74 percent).

TABLE 5.24 - Internet Usage, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Used Internet	80	80	65
Research only	6	25	41
Research and book	74	55	24
Did not use Internet	17	19	33
Don't know	3	1	2

The most common component booked online among international visitors was airfare, followed by lodging, vehicle rental, overnight packages, and tours. While international visitors were less likely than the overall market to book airfare online, they were more likely to book tours and packages. The sample size of Japanese visitors that booked online was too small for analysis.

TABLE 5.25 - Trip Components Booked over Internet, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors
Airfare	71	43
Lodging	28	23
Vehicle rental	16	13
Tours	2	10
Overnight packages	1	13
Ferry	1	1
Other	<1	3

Note: The sample size of Japanese visitors who booked online was too small for analysis.

Travel Agent Usage

Half of fall/winter international visitors, including three-fourths of Japanese visitors, booked at least one component of their trip through a travel agent, compared to just 17 percent of total fall/winter visitors.

TABLE 5.26 - Travel Agent Usage, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Booked through travel agent	17	49	74
Did not book through travel agent	80	49	23
Don't know	3	1	3

Nearly half of international visitors (44 percent) booked airfare through a travel agent, including 63 percent of Japanese visitors. Over one-quarter booked overnight packages via a travel agent, while 17 percent booked tours, 16 percent booked lodging, and 6 percent booked vehicle rental. Japanese visitors were more likely to book airfare, overnight packages, and tours via a travel agent.

TABLE 5.27 - Trip Components Booked through a Travel Agent International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Airfare	16	44	63
Lodging	10	16	22
Vehicle rental	5	6	1
Overnight packages	2	27	64
Tours	1	17	38
Ferry	<1	-	-
Other	<1	<1	1

Usage of State of Alaska Information Sources

One out of four international visitors (23 percent), including 12 percent of Japanese visitors, had visited the travelalaska.com website. Nine percent of total international visitors had received the Official Alaska State Vacation Planner. Japanese visitors were more likely to have received it (16 percent). Usage of the State website and the Vacation Planner were higher among international visitors then among all fall/winter visitors.

TABLE 5.28 - Usage of State of Alaska Information Sources, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Did you visit the official State of Alaska travel website? (www.travelalaska.com)			
Yes	9	23	12
No	88	74	84
Don't know	2	4	4
Did you receive the Official Alaska State Vacation Planner?			
Yes	4	9	16
No	94	87	80
Don't know	2	4	4

Usage of Additional Information Sources

International visitors were more likely to use a variety of information sources than total fall/winter visitors. The most commonly cited source of information for their trip was friends and family accounting for 39 percent of international respondents. Other popular sources were travel guide/books (24 percent), brochures (23 percent), prior experience (20 percent), hotel/lodge (14 percent), and television (13 percent).

Among Japanese visitors, television was the most commonly cited information source (27 percent), followed by brochures (24 percent), travel guide/book (22 percent), prior experience (14 percent), and friends and family (13 percent).

TABLE 5.29 - Other Information Sources, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Prior experience	62	20	14
Friends/family	57	39	13
Brochures (net)	10	23	24
Community brochures	1	<1	1
Ferry brochure/schedule	1	2	-
Cell phone apps	6	<1	1
Hotel/lodge	6	14	8
Television	5	13	27
Magazine	4	9	9
Travel guide/book	3	24	22
AAA	3	-	-
Newspaper	3	3	8
Milepost	1	<1	-
Club/organization	1	-	-
Convention & Visitors Bureau(s)	1	3	1
Library	1	8	8
North to Alaska guide	1	<1	1
Travel/recreation exhibits	<1	3	6
Cruise line/tour company	<1	-	-
Other	2	3	3
None	10	10	9
Don't know	<1	-	-

Origin

Asian visitors made up half of the fall/winter international market, with four out of ten from Japan. One-third of non-Canadian international visitors were from Europe, including the United Kingdom (9 percent), Germany (6 percent), France (4 percent), and Norway (4 percent).

TABLE 5.30 – Origin, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
International	**5**	**100**	**100**
Asia	**3**	**51**	**100**
Japan	2	40	100
Taiwan	<1	7	-
China	<1	2	-
Korea	<1	2	-
Europe	**2**	**31**	**-**
United Kingdom	<1	9	-
German-speaking Europe (GSE)	<1	7	-
Germany	<1	6	-
France	<1	4	-
Norway	<1	4	-
Belgium	<1	2	-
Denmark	<1	2	-
Italy	<1	2	-
Australia	**<1**	**8**	**-**
Brazil	**<1**	**4**	**-**
Mexico	**<1**	**2**	**-**
Other International	**<1**	**4**	**-**

Party Size

Fall/winter international visitors, as well as the sub-group of Japanese visitors, reported an average party size of 1.6. Party size was defined as those traveling in their immediate party, sharing expenses such as food, lodging, and transportation. International visitors traveling in parties of two were nearly double that of total fall/winter visitors, attributable to the higher rate of business travelers and VFRs among total visitors.

TABLE 5.31 - Party Size, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
One	72	51	47
Two	22	42	49
Three	3	6	4
Four	1	-	-
Five or more	1	2	-
Average party size	**1.4**	**1.6**	**1.6**

A new question in AVSP VI, fall/winter visitors were asked their group size – the number of people they are traveling with but not sharing expenses. Average group size among international visitors was 3.4, while Japanese visitors reported an average group size of 4.6. The most commonly cited group size among both total international visitors and Japanese visitors was two people (38 percent and 46 percent, respectively).

International fall/winter visitors were much more likely to be traveling in groups of three or more than total fall/winter visitors (30 percent vs. 12 percent).

TABLE 5.32 - Group Size, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
One	63	31	25
Two	24	38	46
Three	4	9	11
Four	3	8	8
Five	1	3	1
Six to ten	2	7	-
Eleven or more	2	3	8
Average group size	**2.2**	**3.4**	**4.6**

Age and Gender

Fall/winter international visitors were slightly more likely to be male (55 percent male), while the sub-group of Japanese visitors was slightly more likely to be female (56 percent female). The average age among total international visitors was 46.5 years, while Japanese visitors were somewhat older with an average age of 51.9 years.

TABLE 5.33 - Age and Gender, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Gender			
Male	57	55	44
Female	43	45	56
Age			
Under 18	4	2	2
18 to 24	7	9	5
25 to 34	14	21	16
35 to 44	15	15	13
45 to 54	20	15	7
55 to 64	26	18	30
65 and older	15	19	28
Average age (years)	**47.8**	**46.5**	**51.9**

Note: Age and gender data reflect the entire traveling party, not just the respondent.

Household Characteristics

Over one-third of total international visitors reported children living in their household (37 percent), though the proportion of Japanese visitors with children in their household was just 20 percent.

TABLE 5.34 - Children Living In Household, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Children living in household	32	37	20
No children in household	68	63	80
Don't know	<1	-	-

One-quarter of total fall/winter international visitors were retired or semi-retired, similar to figures for total fall/winter visitors. Japanese travelers were somewhat more likely to be retired or semi-retired, at 39 percent.

TABLE 5.35 - Retired or Semi-Retired, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Retired or semi-retired	22	25	39
Not retired	78	75	61
Don't know	1	-	-

Nearly two-thirds of fall/winter international visitors (64 percent) had graduated from college, including over half of Japanese visitors (53 percent). International visitors were more likely to hold a Master's/Doctorate degree than the total fall/winter visitor market (35 versus 21 percent).

TABLE 5.36 – Education, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Some high school	1	5	-
High school diploma/GED	12	8	21
Associate/technical degree	9	4	7
Some college	19	17	14
Graduated from college	37	29	49
Master's/Doctorate	21	35	4
Don't know	<1	2	4

Average income of fall/winter international visitors was reported at $88,000, lower than the figure for total fall/winter visitors ($108,000). Japanese visitors reported an annual average income of $75,000. International visitors were more likely to decline this question, perhaps because they were unable to report their income in terms of US dollars.

TABLE 5.37 - Household Income, International Visitors, 2011-12 (%)

	All Visitors	Int'l Visitors	Japanese
Less than $25,000	6	5	7
$25,000 to $50,000	11	21	22
$50,000 to $75,000	15	13	14
$75,000 to $100,000	15	12	9
$100,000 to $125,000	11	6	10
$125,000 to $150,000	10	3	5
$150,000 to $200,000	8	10	3
Over $200,000	10	4	2
Refused	15	27	28
Average income	**$108,000**	**$88,000**	**$75,000**

Expenditures Per Person

International fall/winter visitors reported spending an average of $1,612 per person on their Alaska trip, including $2,075 among Japanese visitors. This compares with $920 among all fall/winter visitors. On a per-night basis, international visitors spent $144 per person, while Japanese visitors spent $423 per person.

TABLE 5.38 - Visitor Expenditures in Alaska, Per Person, Overall Excluding Transportation to/from Alaska International Visitors, 2011-12

	All Visitors	Int'l Visitors	Japanese
Less than $500	36	9	5
$501 - $1,000	26	22	13
$1,001 - $2,500	17	19	15
$2,501 - $5,000	7	21	22
Over $5,000	3	11	14
Don't know	11	18	32
Average per person, per trip	**$920**	**$1,612**	**$2,075**
Average per person, per night	**$88**	**$144**	**$423**

Note: Spending on airfare and ferry tickets to enter and exit the state is excluded.

Total Expenditures

International visitors spent an estimated $22 million on Alaska travel in fall/winter 2011-12, $12 million of which is attributable to Japanese visitors. International visitor spending represented 9 percent of total fall/winter spending.

TABLE 5.39 - Total Visitor Expenditures in Alaska in Millions of Dollars International Visitors, 2011-12

	All Visitors	Int'l Visitors	Japanese
Total in-state spending	$249m	$22m	$12m

Note: Spending on ferry tickets to enter and exit the state is excluded.