International Visitors to Alaska

Alaska Visitor Statistics Program VI

Summer 2011

Conducted by McDowell Group

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

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Prepared for:

STATE OF ALASKA

Alaska Department of Commerce, Community, and Economic Development

Division of Economic Development

Conducted by:

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March 2012

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International Visitor Volume

Alaska received an estimated 154,100 international visitors in summer 2011 (not including Canadians). They represented 10 percent of the overall Alaska out-of-state visitor market. Compared to 2006, the international market increased its share of the overall visitor market, from 9 to 10 percent. Overall volume, however, was essentially the same between the two years (growing by less than 1 percent, from 153,400 to 154,100). The slight growth in market share is due to a decline in the size of the North American market over the same period.

Europe accounted for the bulk of international visitors in summer 2011 at 64,000, including 33,000 from the United Kingdom (UK) and 20,000 from German-Speaking Europe (GSE). The Australia/New Zealand market accounted for 42,000 visitors, while Asia accounted for 18,000, including 6,000 Japanese and 2,000 Koreans. Mexico accounted for 8,000 visitors. An estimated 22,000 visitors were from other international countries; the most common other countries were Israel and Brazil.

Despite showing essentially the same volume of traffic between 2006 and 2011, the make-up of the international market has shifted. The UK share of the market fell from 37 to 21 percent, while Australia/New Zealand grew from 20 to 27 percent. GSE grew from 10 to 13 percent. Visitors from Other countries grew from 7 to 14 percent of the market.

CHART 1 - Alaska Visitor Volume by Origin

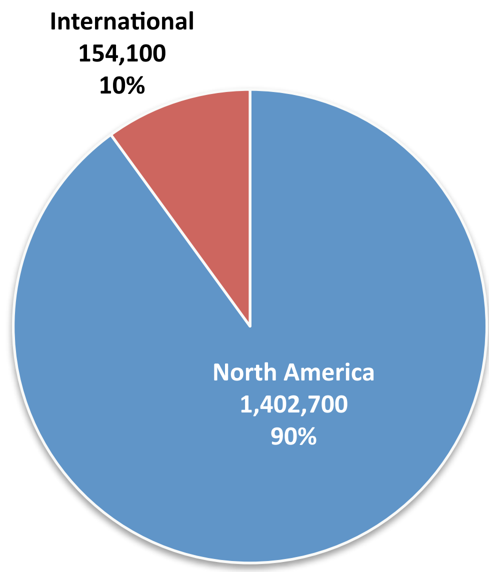


CHART 2 - International Visitor Volume by Origin

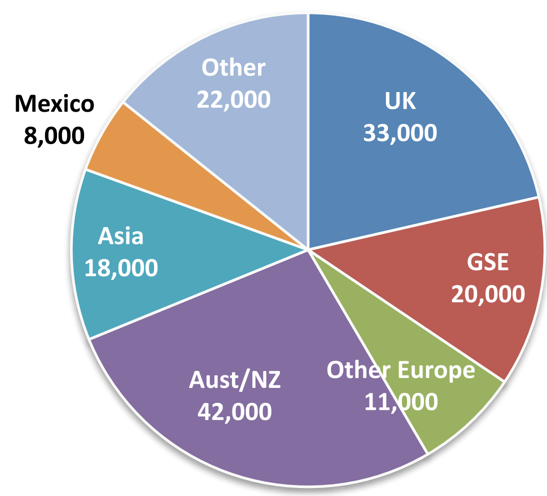
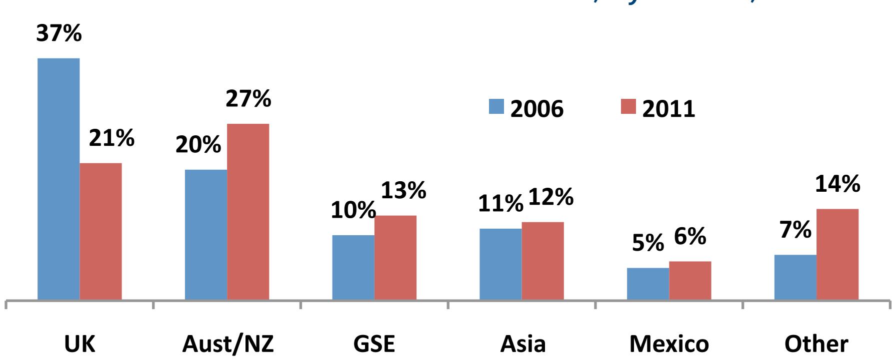


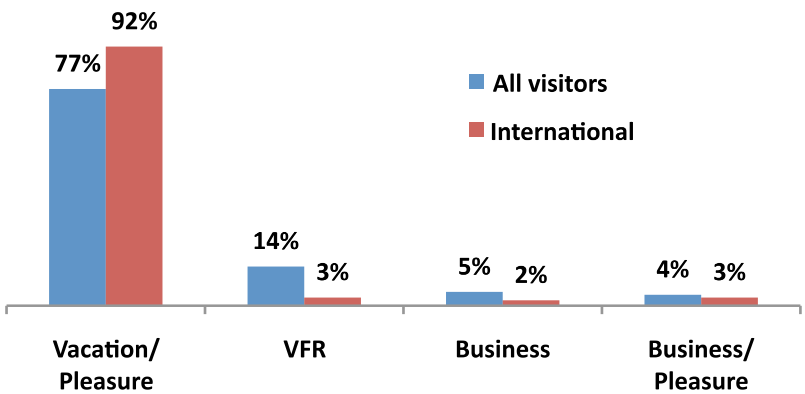
CHART 3 - Share of Total International Volume, by Market, 2006 and 2011



Trip Purpose

Nine out of ten international visitors in summer 2011 were traveling for vacation/pleasure; 5 percent were business-related travelers; and 3 percent were visiting friends or relatives (VFR). Compared to the overall market, international travelers were much more likely to be vacation/pleasure visitors (92 versus 77 percent), and much less likely to be VFRs (3 versus 14 percent). Vacation/pleasure rates were consistently high among the individual markets, ranging from 81 percent of Japanese visitors to 94 percent of UK visitors.

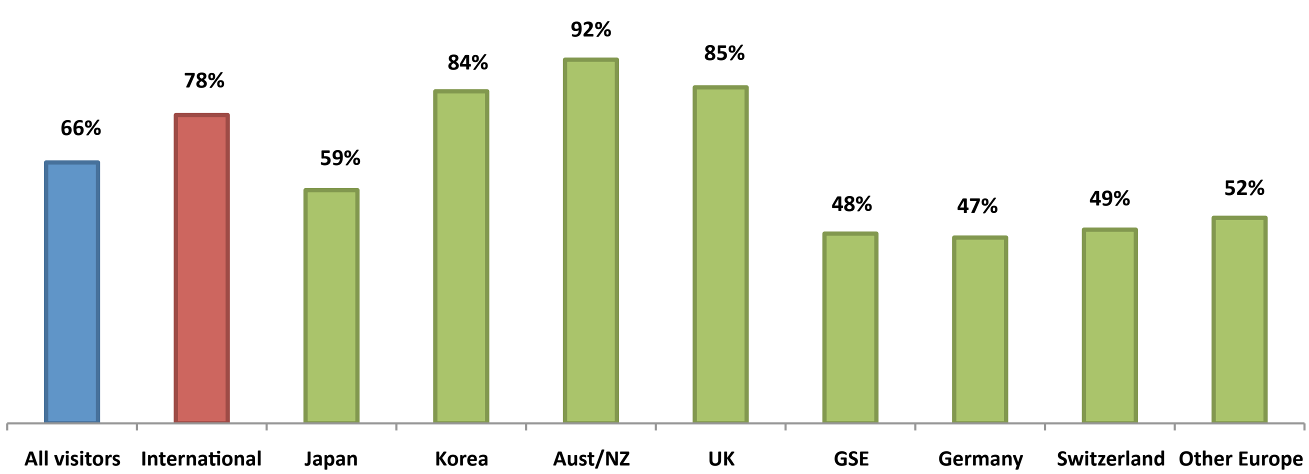
CHART 4 – Trip Purpose, All Visitors and International



Package Purchase

Over three-quarters of international visitors (78 percent) purchased a multi-day package in summer 2011, a higher rate than among all Alaska visitors (66 percent). The rate of package purchase was highest among the Australia/New Zealand, UK, and Korean markets, and lowest among the GSE and Other Europe markets. The vast majority of package purchasers were cruise passengers. Among non-cruise package purchasers, the most common package type was motorcoach tour (37 percent), followed by wilderness lodge (24 percent), then adventure tour and rental car/RV package (both at 13 percent).

CHART 5 – Package Purchase, by Market

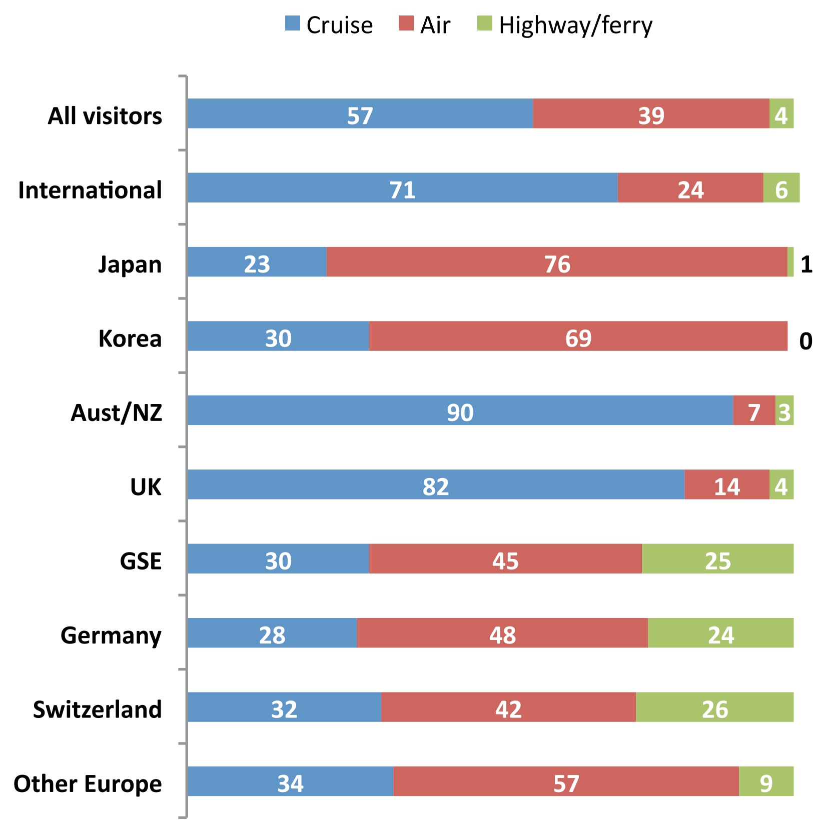


Transportation Market

Seven out of ten international visitors (71 percent) traveled by cruise ship, 24 percent entered and exited the state by air, and 6 percent entered or exited the state by highway or ferry. International visitors were more likely than the overall market to be cruise passengers (71 versus 57 percent); they were less likely to be air visitors (24 versus 39 percent); and they were slightly more likely to be highway/ferry visitors (6 versus 4 percent).

Transportation usage varied widely by market, with Australia/New Zealand and UK visitors much more likely to be cruise passengers (90 and 82 percent, respectively). Japanese visitors were the least likely to be cruise passengers (23 percent), and were the most likely to travel by air (76 percent). GSE visitors were the most likely to travel by highway/ferry at 25 percent (including 24 percent of Germans and 26 percent of Swiss).

CHART 6 – Transportation Market, by International Market (%)



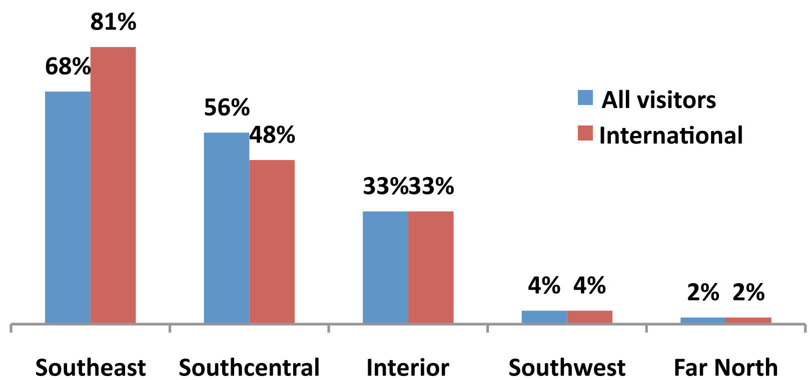
Length of Stay

International visitors reported an average length of stay in Alaska of 10.2 nights, one night longer than the overall market average of 9.2. The markets with higher average stays included Switzerland at 15.2 nights, Other Europe at 14.3 nights, GSE at 13.4 nights, and Germany at 12.2 nights. Korean visitors reported the lowest average length of stay at 7.4 nights, followed by UK at 8.2 nights.

Regions Visited

Four out of five international visitors (81 percent) traveled to Southeast Alaska, nearly half (48 percent) visited Southcentral, and one-third (33 percent) visited the Interior. Compared to the total visitor market, international visitors were more likely to visit Southeast (81 versus 68 percent), and less likely to visit Southcentral (48 versus 56 percent). Regional visitation varied significantly between individual markets, generally reflecting each market's propensity to travel by cruise ship versus highway/ferry. Markets primarily consisting of cruise ship passengers (including UK and Australia/New Zealand) showed high rates of Southeast travel, while markets with a higher-than-average proportion of highway/ferry visitors (GSE markets) showed high rates of Interior travel.

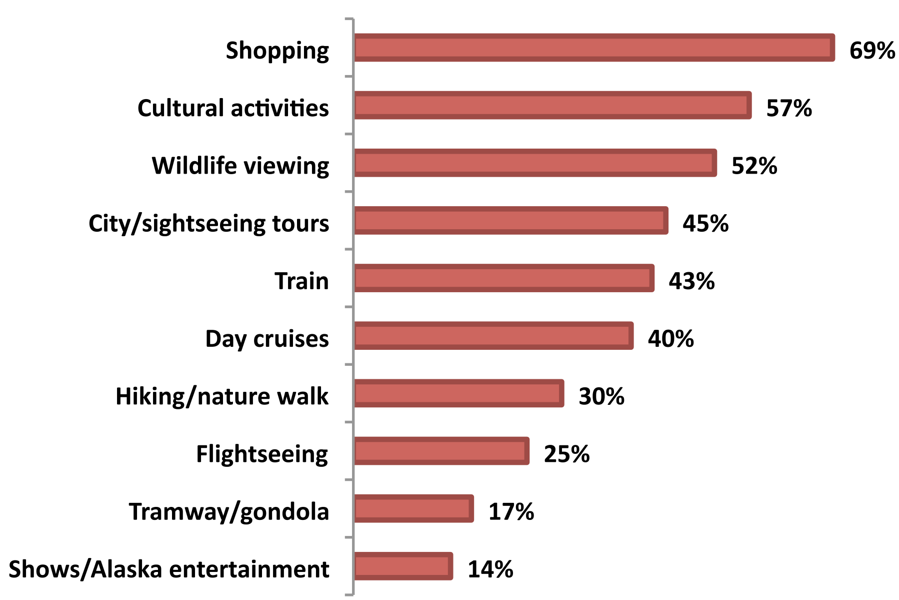
CHART 7 – Regions Visited, All Visitors and International



Activities

The most popular activities among international visitors were shopping, cultural activities, and wildlife viewing. International visitors tended to participate in activities at similar rates to the overall market, although they were much less likely to go fishing or visit friends/family.

CHART 8 - International Visitors' Top 10 Activities in Alaska

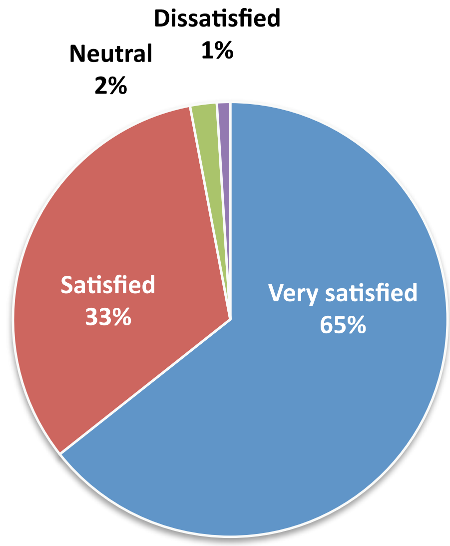


Satisfaction Ratings

Virtually all international visitors (98 percent) expressed satisfaction with their overall Alaska experience, including 65 percent who were very satisfied. Just 1 percent were dissatisfied, and zero were very dissatisfied. International visitors were slightly less satisfied when compared to the overall visitor market (65 versus 71 percent very satisfied). Australia/New Zealand and Other European visitors showed the highest very satisfied ratings, while Japanese and Korean visitors showed lower ratings.

In terms of individual categories, international visitors were the most satisfied with friendliness of residents (65 percent very satisfied), followed by sightseeing (61 percent) and wildlife viewing (52 percent). They were least satisfied with shopping (24 percent very satisfied) and value for the money (25 percent).

CHART 9 – Satisfaction with Overall Alaska Experience

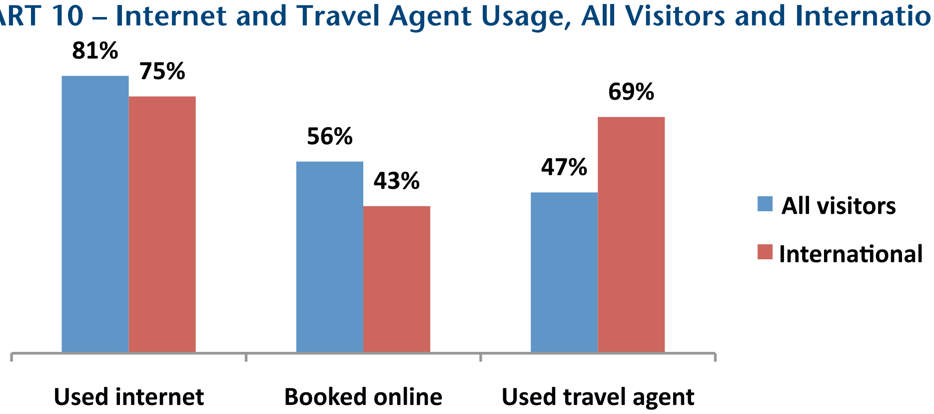


Compared to the overall visitor market, international visitors gave lower ratings in every category, with the exception of visitor information services.

Trip Planning

Three-quarters of international visitors used the internet to plan their Alaska trip, including 43 percent who booked at least one portion of their trip online. Both internet usage rates and online booking rates were lower than that of the overall visitor market (75 versus 81 percent, and 43 versus 56 percent, respectively). Seven out of ten international visitors used a travel agent to book at least one portion of their Alaska trip, a much higher rate when compared to the overall visitor market rate of 47 percent.

CHART 10 – Internet and Travel Agent Usage, All Visitors and International



International visitors made their Alaska trip decision an average of 9.7 months ahead of time, compared to 8.6 months among all visitors. International visitors booked their major travel arrangements an average of 6.2 months ahead of time, about one month longer than the average among all visitors (5.4 months).

Demographics

International visitors tended to show demographic characteristics similar to the overall Alaska visitor market. Their average reported party size was 2.5 people, the same as among all visitors. The average was lowest among UK and GSE visitors (2.1) and highest among Korean visitors (3.4). The average age among international visitors was 50.7, matching the average among all visitors. Average age was lowest among Other Europeans at 43.1, and highest among UK visitors at 59.0.

Expenditures

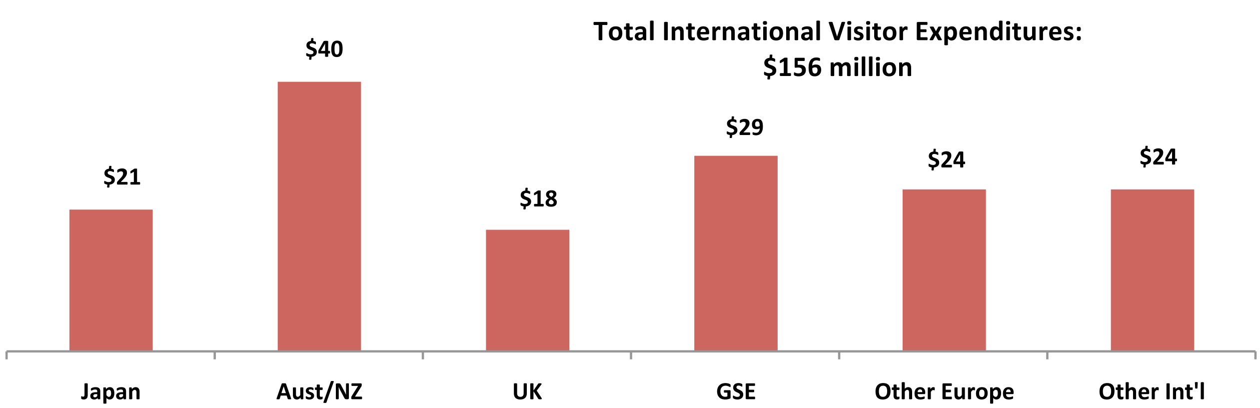
On average, international visitors spent $1,013 per person while in Alaska in summer 2011, excluding spending on transportation to enter/exit the state and cruise packages. Average per-person spending was highest among Japanese visitors at $3,440, followed by Other Europeans ($2,218), GSE ($1,446), Australia/New Zealand ($961), and UK visitors ($531). (The sample size among Korean respondents was too small for analysis.)

The average spending of $1,013 per person is 8 percent above the average among all visitors of $941. It also represents an increase of 8 percent over the 2006 average among international visitors ($936); however, in terms of inflation-adjusted dollars, average spending fell by 5 percent. (The decline among all visitors in terms of real dollars was 11 percent.)

International visitors spent an estimated $156 million in Alaska in summer 2011, excluding transportation costs to enter/exit the state, and cruise packages. Australia/New Zealand visitors made the biggest impact at $40 million in spending, followed by GSE at $29 million, Other Europe at $24 million, Japan at $21 million, and UK at $18 million.

Total spending by international visitors increased by 9 percent between 2006 and 2011; in terms of real (inflation-adjusted) dollars, total spending actually decreased by 4 percent. This decline in real spending is less pronounced among international visitors than among the total visitor market (down 4 versus 13 percent).

CHART 11 – Total International Visitor Expenditures in Alaska in Millions of Dollars By International Market



Notes: Expenditures by Swiss and German visitors are included in GSE total. Sample size among Korean visitors too small for analysis.

Introduction

This report provides a profile of Alaska's international visitor market for summer 2011, and is supplemental to the main report for the *Alaska Visitor Statistics Program VI* (AVSP). The AVSP is a statewide visitor study periodically commissioned by the Alaska Department of Commerce, Community, and Economic Development. The study provides the state government and the tourism industry essential information on one of Alaska's major economic engines: out-of-state visitors. Previous AVSP studies were undertaken in 1985, 1986, 1989, 1993, 2001, and 2006. McDowell Group conducted all but the 2001 study.

The project consists of two main components: an estimate of visitor volume, and a survey of visitors. The study is undertaken in two stages: Summer 2011 (May 1-September 30) and Fall/Winter 2011-2012 (October 1-April 30). This report addresses the summer period.

The AVSP VI project team was lead by McDowell Group, Inc., a research and consulting firm with offices in Juneau and Anchorage. McDowell Group was assisted by Fusion MR based in Portland, Oregon and MR Data of Seaview, Washington.

This report presents estimated international visitor volume by market, followed by visitor survey results for all international visitors, in addition to the following sub-groups: Japan, Korea, Australia/New Zealand, United Kingdom, German-Speaking Europe (GSE), Switzerland, and Other Europe. Results for the entire Alaska visitor market (international and US visitors combined) are provided for comparative purposes.

The following table shows the sample sizes for each market profiled in this report, and their maximum margin of error.

TABLE 1 - International Market Sample Sizes

Market	Sample Size	Maximum Margin of Error
International Visitors (excludes Canadians)	1,220	±2.8%
German-Speaking Europe (Germany, Switzerland, Austria)	455	4.6
Japan	153	7.8
Korea	59	12.6
Australia/New Zealand	116	9.0
United Kingdom	108	9.4
Germany	298	5.6
Switzerland	138	8.3
Other Europe	190	7.1

Note: For the purpose of this report, the term "international" excludes Canadians.

Methodology

Following is a brief summary of methods employed in the AVSP Summer 2011 visitor survey, including extra detail on the international visitor sample. For a full description of methodology used in AVSP VI, please refer to the complete report, available at the following website:

http://www.dced.state.ak.us/ded/dev/toubus/home.cfm

Survey Population

The AVSP Summer 2011 survey was conducted with out-of-state visitors who were exiting Alaska between May 1 and September 30, 2011. Seasonal residents, such as cannery and oil field workers, were screened out of the survey. The AVSP Summer 2011 survey program included 3,563 intercept surveys (in-person interviews) and 3,184 surveys completed online, for a total of 6,747 surveys.

Survey Design

The McDowell Group study team designed the survey with input from the Alaska Department of Commerce, Community, and Economic Development and the Alaska Travel Industry Association.

Survey Staff

The AVSP Summer 2011 survey staff included 40 surveyors. Surveyors underwent extensive training in order to ensure that respondents were dealt with in a friendly and courteous manner, and that all surveys were administered in the same way to minimize bias.

Survey Locations

The following table shows where surveys were conducted. These exit locations account for virtually 100 percent of visitors exiting Alaska. The limited number of visitors using other modes and locations does not warrant including them in the sample.[1] In every survey location, online invitation cards were also distributed.

TABLE 2 - Survey Locations

Exit Mode	Survey Location
Domestic Air	Anchorage, Fairbanks, Juneau, Ketchikan, and Sitka Airports
International Air	Anchorage and Fairbanks Airports
Highway	Near borders on Klondike, Haines, and Alcan Highways; north of Tetlin Junction on Taylor Highway
Cruise Ship	Cruise ship and lightering docks in Ketchikan, Skagway, and Sitka
Ferry	In the Ketchikan ferry terminal and onboard ferries docked in Ketchikan, bound for Bellingham and Prince Rupert

[1] Un-sampled exit modes include: commercial vehicles, motorcoaches, private planes, private boats, pedestrians, and airplane passengers flying directly out-of-state from Cordova, Yakutat, Petersburg, and Wrangell.

International Visitors

AVSP VI included a number of strategies designed to increase the international sample above what was achieved in 2006.

- The international air sample was increased substantially, from 573 to 891. The increase in the domestic air sample (from 3,445 to 4,149) also allowed for greater capture of international visitors exiting by that mode.
- Japanese and Korean interpreters were employed for Japan Air and Korean Air flights. The Anchorage International Airport survey crew also included fluent speakers of German and Spanish.
- The online survey was translated into German, Japanese, and Spanish. The back side of the invitation card contained translated text in the three languages inviting survey participation.

These efforts resulted in a sample size of 1,220 international visitors – an increase of 74 percent over the 2006 sample of 703.

Visitor Volume by Market

Alaska received an estimated 154,100 international visitors in summer 2011, not including Canadians. Europe accounted for 42 percent of international visitors, including 21 percent from the United Kingdom (UK) and 13 percent from German-Speaking Europe (GSE). Australia/New Zealand was also a prominent market at 27 percent of all international visitors. Asia (including Japan, Korea, Malaysia, Thailand, and India, among others) accounted for 12 percent of international visitors; and Mexico accounted for 6 percent.

The table below shows countries that captured a minimum of 1 percent of the international market. Readers are advised that the market size estimates reflect survey results, all of which carry a margin of error.

CHART 12 - International Visitors, By Origin

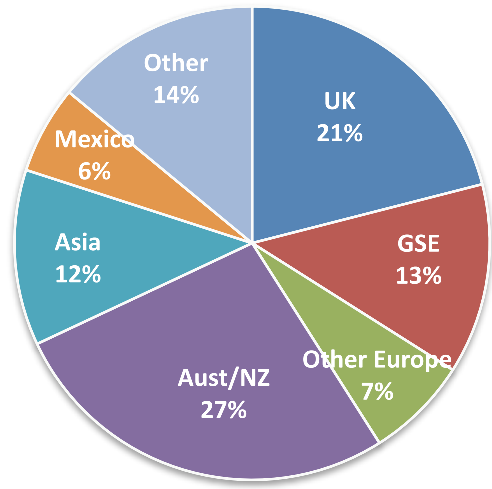


TABLE 3 - Countries of Origin and Estimated Market Size

	% of Int'l Visitor Market	Estimated Market Size
Europe	**42%**	**64,000**
United Kingdom	21	33,000
German-Speaking Europe	13	20,000
Germany	8	12,000
Switzerland	5	7,000
Austria	1	1,000
Other Europe	7	11,000
Netherlands	2	3,000
France	1	2,000
Australia/New Zealand	**27%**	**42,000**
Australia	23	36,000
New Zealand	4	6,000
Asia	**12%**	**18,000**
Japan	4	6,000
India	2	3,000
China	2	3,000
Malaysia	2	2,000
Korea	1	2,000
Thailand	1	2,000
Mexico	**6%**	**8,000**
Other International	**14%**	**22,000**
TOTAL INTERNATIONAL	**100%**	**154,000**

All countries listed in the preceding table represented at least 1 percent of the international market (after data weighting), with the exception of Austria at 0.8 percent. Following is a list of additional countries mentioned by survey respondents, along with the number of survey respondents for each country. The countries listed below each represent less than 1 percent of the international market. Such small sample sizes preclude drawing conclusions about estimated market size, but it is useful to see which countries were mentioned more, or less, often.

Eight of the top ten most frequently mentioned additional countries were European, including Italy, Spain, Belgium, Czech Republic, Denmark, Norway, Poland, and Russia. The two exceptions were Israel and Brazil.

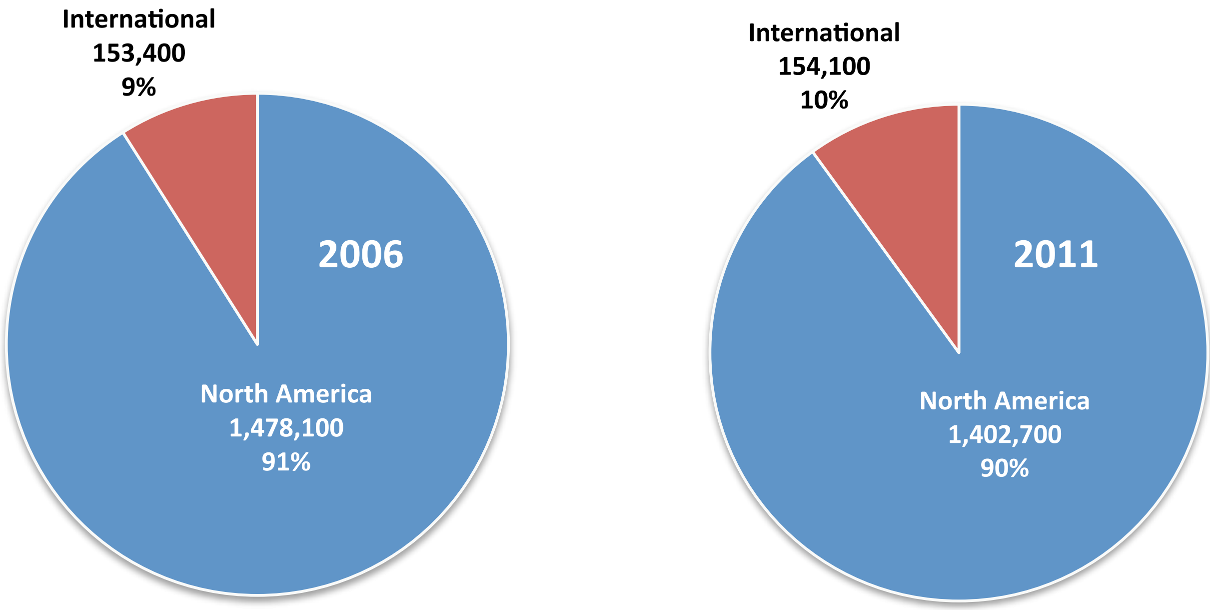
TABLE 4 - Additional International Countries with Number of Responses

Countries with more than one response		Countries with one response each
Italy (35)	Ireland (3)	Argentina
Spain (29)	Colombia (2)	Costa Rica
Belgium (21)	Peru (2)	Dominican Republic
Israel (13)	Lithuania (2)	Ecuador
Czech Republic (9)	Venezuela (2)	Egypt
Denmark (9)		Guatemala
Norway (9)		Iceland
Brazil (9)		Indonesia
Poland (8)		Lebanon
Russia (8)		Liechtenstein
Puerto Rico (7)		Luxemburg
Hungary (7)		Nepal
Sweden (6)		Nicaragua
Slovakia (5)		Philippines
South Africa (5)		Romania
Virgin Islands (5)		Saudi Arabia
Portugal (4)		Serbia
Singapore (4)		Taiwan
Greece (4)		Turkey

International Visitor Volume Trends

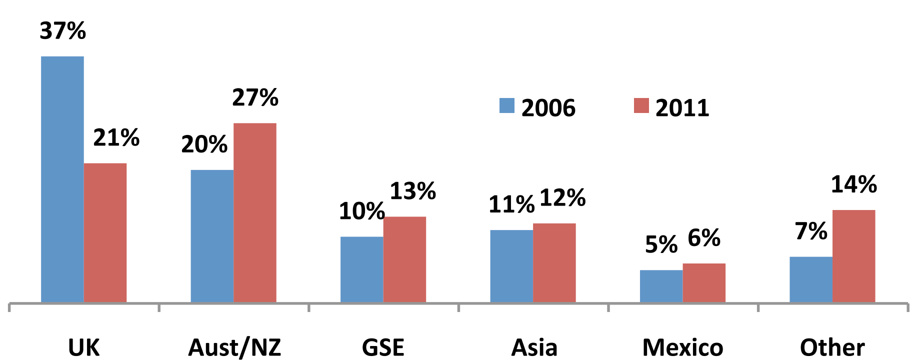
International visitor volume in summer 2011 (154,100) fairly closely matched the estimated volume of 2006 – less than 1 percent more than the 2006 volume of 153,400. However, while volume was essentially the same, international visitors' share of the overall visitor market increased from 9 to 10 percent, while North America's share fell from 91 to 90 percent. In terms of visitor volume, the North American market declined between the two years, while the international market held steady.

CHART 13 – International Visitors' Share of Total Alaska Visitor Market, 2006 and 2011



Despite showing essentially the same volume of traffic between 2006 and 2011, the make-up of the international market shows some differences between the two years. The largest difference was in the UK market, which fell from 37 percent of the international market, to 21 percent. Australia/New Zealand visitors appear to have increased, growing from 20 to 27 percent of the international market. The GSE market grew slightly, from 10 to 13 percent of the market. Asia's share grew by 1 percent, from 11 to 12 percent, and Mexico's share likewise grew by 1 percent (from 5 to 6 percent). Visitors from other countries grew from 7 to 14 percent of the market.

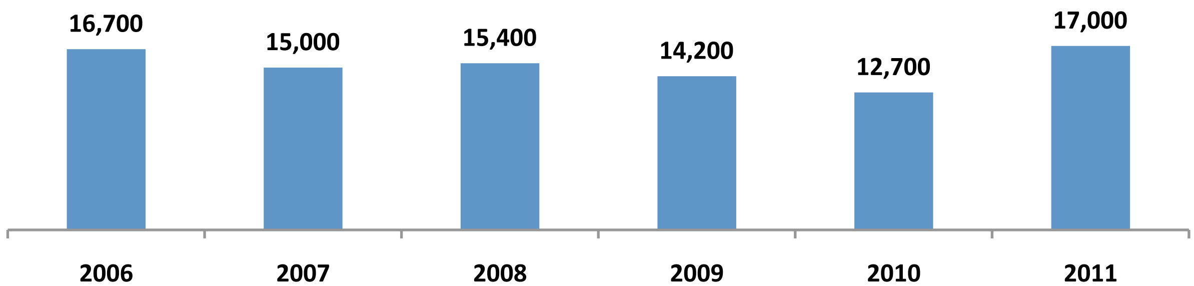
CHART 14 - Share of Total International Volume, by Market, 2006 and 2011



While international visitors primarily exit Alaska via cruise ship and domestic air, a significant number travel via international air. International air passenger statistics are useful indicators because these passengers are virtually all international visitors. The chart below shows how the volume of visitors exiting via international air has fluctuated over the last six years.

The volume of visitors departing Alaska via international air increased significantly in summer 2011, from 12,700 to 17,000. However, the total was still only slightly above 2006 levels, after declines in both 2009 and 2010. International carriers in 2011 included Condor Air (with service to Frankfurt), Japan Airlines, Korean Airlines, and Edelweiss Air (with service to Zurich). The addition of Edelweiss and Korean Air in 2011 helped offset the loss of China Airlines, which ceased Anchorage flights in April 2011.

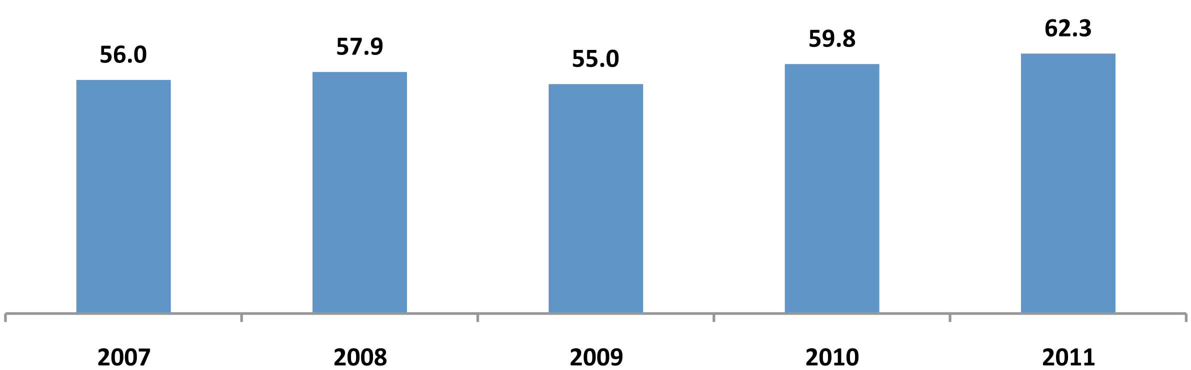
CHART 15 – Visitor Volume Departing Alaska via International Air, 2006-2011



To help put Alaska's international market into context, the following chart shows total international visitor volume to the US between 2007 and 2011. Total international travel to the US has fared better than travel within the US over the last several years. Since a drop of 5.1 percent in 2009 in reaction to the global recession, international travel increased by 8.8 percent in 2010 and by 4.1 percent in 2011 (versus 3.4 percent and 2.2 percent for domestic travel). The volume of visitors in 2011 (62.3 million) is 11 percent greater than the volume in 2007 (56.0 million).

Exchange rates for the US dollar have been favorable for many international travelers over the last few years. The value of the Japanese Yen based to the US dollar increased 44 percent from 2006 to 2011, the Australian dollar by 44 percent, the Canadian dollar by 17 percent, and the Euro by 13 percent.

CHART 16 - International Visitors to US, in Millions, 2007-2011



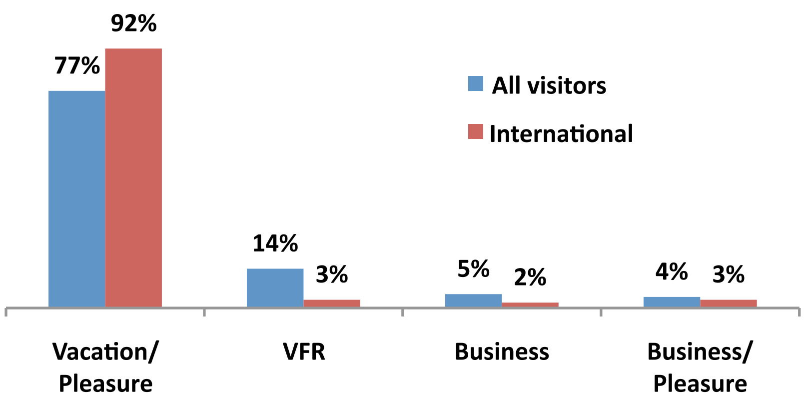
Source: US Travel Association.

Trip Purpose

Nine out of ten international visitors (92 percent) in summer 2011 were traveling for vacation/pleasure purposes – significantly higher than the 77 percent rate among all visitors. Only 3 percent were visiting friends or relatives (VFRs), compared to 14 percent of the total market. The rate of those traveling for business-related purposes was also lower than the total market (5 versus 9 percent).

Trip purpose rates among international visitors in summer 2011 very closely matched those of 2006.

CHART 17 - Trip Purpose, All Visitors and International



Among the various international markets, GSE, UK, and Australia/NZ visitors had slightly higher rates of vacation/pleasure travelers. Japanese and Korean visitors were less likely to be traveling for vacation/pleasure, and more likely to be traveling for business.

TABLE 5 - Trip Purpose, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Vacation/pleasure	77	92	81	84	93
Visiting friends or relatives	14	3	7	4	1
Business only	5	2	6	12	1
Business and pleasure	4	3	6	-	5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Vacation/pleasure	94	93	91	96	91
Visiting friends or relatives	2	5	6	3	4
Business only	1	1	1	-	4
Business and pleasure	2	2	3	1	1

Packages

Over three-quarters of international visitors purchased a multi-day package, compared to two-thirds of the overall visitor market. (Cruise visitors are automatically considered package visitors.) The rate of package purchase was highest among the Australia/New Zealand, UK, and Korean markets, and lowest among the GSE and Other Europe markets. The 2011 package purchase rate of 78 percent was similar to the 2006 rate of 79 percent.

CHART 18 - Purchased Multi-Day Package, By International Market

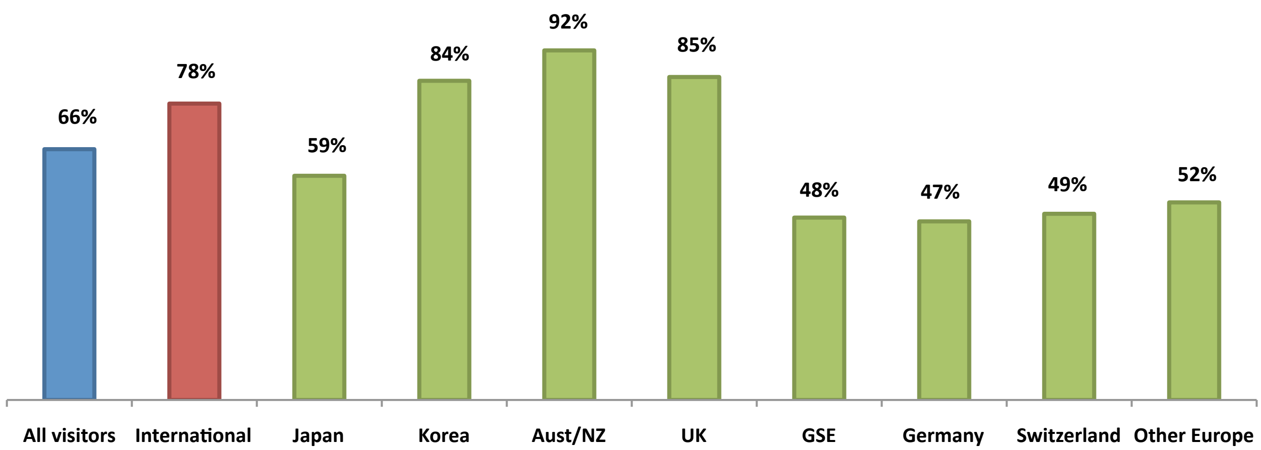


TABLE 6 - Purchase of Multi-Day Packages, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Purchased package	66	78	59	84	92
Did not purchase package	34	21	30	16	7
Don't know	1	1	11	-	<1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Purchased package	85	48	47	49	52
Did not purchase package	15	50	51	49	47
Don't know	<1	2	2	2	1

The most popular type of non-cruise package among international visitors was motorcoach tour at 37 percent, followed by wilderness lodge package, adventure tour, rental car/RV package, and fishing lodge package. Compared to the overall visitor market, non-cruise international visitors were less likely to participate in fishing packages, and more likely to purchase both motorcoach and rental car/RV packages.

Korean visitors who purchased a package almost exclusively fell in the motorcoach tour category. Japanese visitors were also much more likely to purchase motorcoach tours compared to other international visitors. GSE visitors participated in a range of package types. They were nearly twice as likely as the total international market to purchase rental car/RV packages. Within the GSE market, German and Swiss visitors differed in their package purchase behavior. Germans were less likely to purchase fishing lodge packages, and more likely to purchase motorcoach tours and rental car/RV packages, when compared to Swiss visitors.

International visitors who purchased non-cruise packages in 2011 were more likely to purchase motorcoach packages, and less likely to purchase rail and adventure packages, when compared to 2006.

TABLE 7 - Package Type, By International Market (%)
Base: Non-Cruise Package Visitors

	All visitors	International	Japan	Korea	Aust./NZ
Fishing lodge package	44	9	1	-	*
Wilderness lodge package	16	24	15	2	*
Adventure tour	13	13	2	-	*
Motorcoach tour	10	37	67	98	*
Rail package	9	3	13	-	*
Rental car/RV package	6	13	1	-	*
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Fishing lodge package	*	17	9	33	7
Wilderness lodge package	*	23	20	29	34
Adventure tour	*	15	11	16	24
Motorcoach tour	*	20	31	2	14
Rail package	*	2	3	-	2
Rental car/RV package	*	24	27	18	19

* Sample size too small for analysis.

A follow-up question asked non-cruise package purchasers which portions of their trip were included in their package. The most common component was lodging at 90 percent, followed by tours at 70 percent and meals at 66 percent. Packages purchased by international visitors were more inclusive when compared to those of the overall visitor market, with inclusion rates higher for each component among international visitors, with the exception of fishing.

Japanese and Korean visitors showed much higher rates of inclusion for most trip components compared to other international visitors. GSE visitors were much more likely to have rental car/RV included in their trip package.

TABLE 8 - Portions of Trip Included in Package (%)
Base: Non-Cruise Package Visitors

	All visitors	International	Japan	Korea	Aust./NZ
Lodging	88	90	98	100	*
Meals	60	66	93	100	*
Fishing	44	10	2	-	*
Tours	39	70	89	96	*
Air	29	61	81	98	*
Bus/motorcoach	22	41	87	98	*
Railroad	22	30	87	4	*
Vehicle/RV rental	11	18	1	-	*
Ferry	5	13	16	2	*
Other	7	5	3	-	*
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Lodging	*	89	91	87	71
Meals	*	45	41	53	40
Fishing	*	16	7	29	7
Tours	*	46	55	33	74
Air	*	50	48	51	62
Bus/motorcoach	*	22	23	22	17
Railroad	*	5	8	2	16
Vehicle/RV rental	*	35	42	25	26
Ferry	*	13	17	4	16
Other	*	2	1	5	2

* Sample size too small for analysis.

Among international visitors who cruised, 69 percent were on a round-trip cruise; 15 percent purchased a land tour; 13 percent cruised one-way and flew one-way; and 3 percent cruised within the state. These rates are similar to those of the overall market, although international visitors were slightly more likely to be on round trip cruises, and were less likely to take land tours. Thirty-six percent of international cruisers spent time on their own before or after their cruise.

TABLE 9 - Cruise Package Type (%)
Base: International Cruise Visitors

	All visitors	International	Aust./NZ	UK
Round trip	59	69	80	76
Cruise one-way, fly one-way	15	13	11	12
Cruise with land tour	24	15	8	12
In-state cruise	1	3	1	<1
Spent time on own before/after cruise	27	36	31	27

Note: Sample sizes for other markets too small for analysis.

The vast majority of international cruisers who participated in a land tour said that lodging, railroad, and bus/motorcoach were included in their land tour package, similar to the overall market. One-third of land tour purchasers said they purchased the land tour through their cruise line, a much lower rate compared to the overall market (61 percent). International visitors were much less likely to know who they purchased their land tour from (25 percent did not know, compared to 11 percent of the total market).

TABLE 10 – Land Tour Packages (%)
Base: International Cruise Visitors

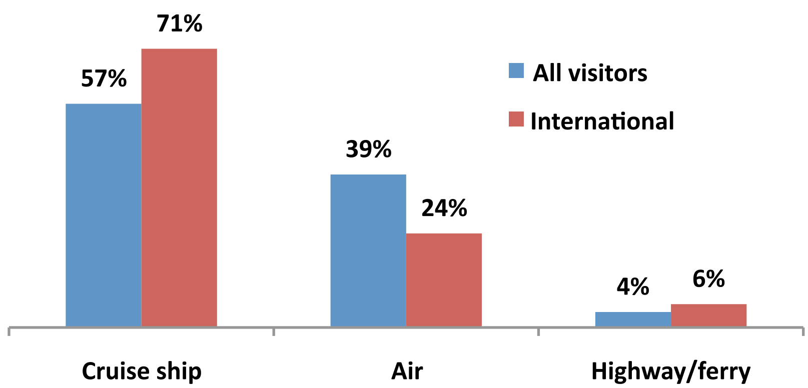
	All visitors	International
Portions of trip included in land tour package (Base: participated in land tour)		
Lodging	93	79
Railroad	89	78
Bus/motorcoach	88	81
Tours	73	58
Meals	30	40
Air	28	32
Vehicle/RV rental	1	6
Other	2	1
Don’t know/refused	1	<1
Purchased land tour from cruise line (Base: participated in land tour)		
Cruise line	61	34
Other company	28	41
Don’t know	11	25

Note: Sample sizes for individual markets too small for analysis.

Modes of Transportation

The following chart and table show how international markets break down by transportation market. Seven out of ten international visitors were cruise ship passengers; 24 percent traveled to and from the state by air; and 6 percent entered or exited Alaska by highway or ferry. International visitors reported a higher rate of cruise participation compared to the overall market, largely due to the prominent Australia/New Zealand and UK markets. International visitors were slightly more likely to travel by highway/ferry when compared to the overall market (6 versus 4 percent). The likelihood of traveling by cruise ship stayed the same between 2006 and 2011; 71 percent of international travelers overnighted on a cruise ship in 2006.

CHART 19 - Transportation Market, All Visitors and International



Australia/New Zealand and UK visitors were much more likely than other international markets to travel by cruise ship, at 90 and 82 percent, respectively. About one-quarter to one-third of other international visitors traveled by cruise ship. GSE visitors were unique in showing a high rate of highway/ferry travel: 25 percent, compared to 6 percent of the total international market.

TABLE 11 - Transportation Market, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ[1]
Cruise ship	57	71	23	30	90
Air	39	24	76	69	7
Highway/ferry	4	6	1	-	3
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Cruise ship	82	30	28	32	34
Air	14	45	48	42	57
Highway/ferry	4	25	24	26	9

[1] Other data suggests that the size of the Australia/New Zealand cruise market to Alaska is approximately 25,000 passengers, which translates to 60 percent (rather than 90 percent) of the Australia/New Zealand visitor market.

Visitors were also asked whether they used specific forms of transportation to travel between communities within Alaska. Compared to the overall visitor market, international visitors were less likely to use rental vehicles, personal vehicles, or train to travel between communities. Japanese and Korean visitors were particularly likely to travel by motorcoach/bus, while GSE and Other European visitors showed high rates of rental vehicle usage.

Compared to 2006, international visitors in 2011 reported higher usage of both motorcoach/bus (from 16 percent in 2006 to 27 percent in 2011) and train (from 8 to 18 percent). Rates for other types of transportation were similar between the two years.

TABLE 12 - Transportation Used to Travel Between Communities, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Motorcoach/bus	25	27	72	54	24
Train	22	18	49	4	16
Rental vehicle	15	12	3	-	3
Personal vehicle	11	5	<1	1	4
Air	10	9	16	31	6
State ferry	3	6	7	-	3
Rental RV	2	4	-	-	1
Personal RV	1	<1	-	-	<1
Don't know/refused	<1	<1	-	-	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Motorcoach/bus	25	14	16	7	22
Train	18	7	10	3	17
Rental vehicle	8	37	38	40	31
Personal vehicle	2	8	8	8	7
Air	10	14	12	15	21
State ferry	4	16	17	13	13
Rental RV	1	14	10	24	12
Personal RV	<1	2	1	4	1
Don't know/refused	2	<1	<1	-	-

Note: Cruise ship was not included in this question because it is an assumed mode of travel for all cruise visitors.

International visitors who reported entering or exiting the state via highway were asked what type of vehicle they were using. Responses were about evenly split between car/truck/van and RV/camper. These rates were similar to the overall visitor market, although international visitors were less likely to enter Alaska via car/truck/van, and more likely to enter Alaska using an "other" type of vehicle, most commonly motorcoach.

Among GSE visitors who entered/exited Alaska by highway, they showed a slightly higher tendency to use an RV/camper to enter/exit the state than to use a car/truck/van. Fifty-two percent used an RV/camper to enter the state, and 57 percent used an RV/camper to exit the state. Forty-seven percent used a car/truck/van to enter the state, and 42 percent used a car/truck/van to exit the state.

TABLE 13 - Type of Vehicle (%)
Base: Entered and/or Exited by Highway

	ALL VISITORS		INTERNATIONAL	
	Entered by Highway	Exited by Highway	Entered by Highway	Exited by Highway
Car/truck/van	52	51	44	50
RV/camper	41	44	42	47
Motorcycle	4	4	1	-
Other	4	1	13	3

Note: Sample sizes for individual markets too small for analysis.

Length of Stay, Destinations, and Lodging

Length of Stay

International visitors reported an average length of stay in Alaska of 10.2 nights, one night longer than the overall market average of 9.2. The markets with higher average stays included Switzerland at 15.2 nights, Other Europe at 14.3 nights, GSE at 13.4 nights, and Germany at 12.2 nights. Korean visitors reported the lowest average length of stay at 7.4 nights, followed by UK at 8.2 nights. The summer 2011 average stay of 10.2 represents an increase over the average stay in 2006 of 8.9 nights.

CHART 20 - Average Number of Nights in Alaska, By International Market

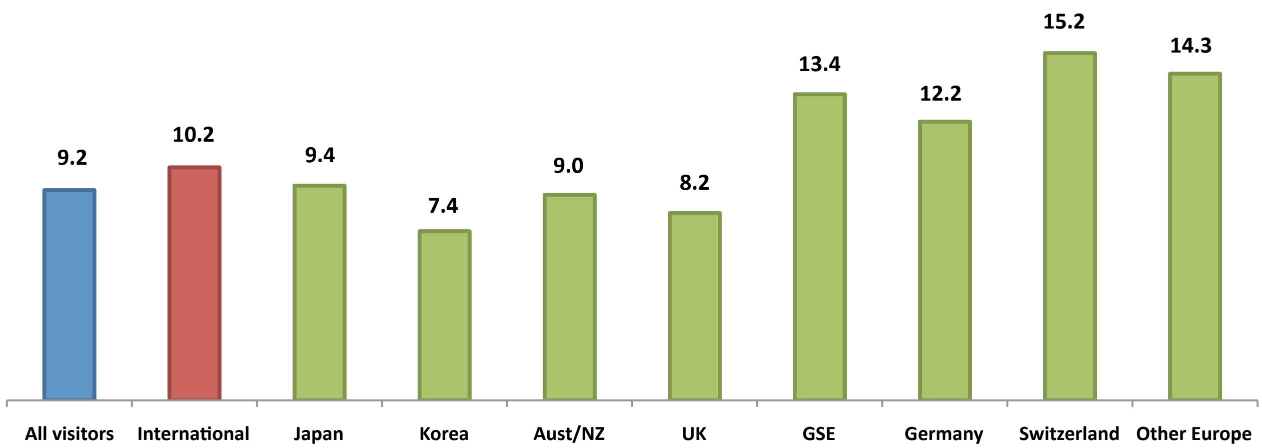


TABLE 14 - Length of Stay in Alaska, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Three nights or less	6	3	-	3	<1
Four to seven nights	49	56	77	82	69
Eight to 14 nights	36	28	13	1	26
15 to 21 nights	5	7	5	5	3
22 or more nights	3	6	4	7	2
Average number of nights	**9.2**	**10.2**	**9.4**	**7.4**	**9.0**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Three nights or less	7	8	11	6	1
Four to seven nights	65	25	24	21	24
Eight to 14 nights	22	30	32	32	40
15 to 21 nights	3	23	23	20	20
22 or more nights	3	14	10	21	14
Average number of nights	**8.2**	**13.4**	**12.2**	**15.2**	**14.3**

Lodging

Cruise ship was by far the most common type of lodging used by international visitors in summer 2011 at 69 percent. One-third of international visitors overnighted in a hotel/motel. Less commonly used lodging types included lodge, campground/RV, B&B, private home, and wilderness camping. International visitors were more likely than the overall market to overnight on a cruise ship (69 versus 56 percent) and much less likely to stay in private homes (5 versus 16 percent), reflecting their lower proportion of VFRs.

Australia/New Zealand and UK visitors were the most likely to overnight on a cruise ship, and showed low usage rates of other types of lodging. Japanese and Korean visitors showed high rates of hotel/motel usage at 62 and 60 percent, respectively. GSE visitors reported using a wide variety of lodging, reflecting their higher average length of stay. They were much more likely than other international visitors to use a campground/RV at 33 percent, including 46 percent of Swiss visitors.

TABLE 15 - Lodging Types Used, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ[1]
Cruise ship	56	69	23	30	90
Hotel/motel	38	35	62	60	23
Lodge	19	13	18	14	6
Private home	16	5	11	33	3
Campground/RV	6	8	-	1	3
B&B	5	6	2	-	5
Wilderness camping	3	4	-	-	2
Other	5	4	6	-	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Cruise ship	79	30	28	32	34
Hotel/motel	22	48	48	52	60
Lodge	14	25	22	31	19
Private home	5	9	11	7	9
Campground/RV	3	33	28	46	23
B&B	5	16	15	15	17
Wilderness camping	5	9	10	6	8
Other	2	10	11	10	8

[1] Other data suggests that the size of the Australia/New Zealand cruise market to Alaska is approximately 25,000 passengers, which translates to 60 percent (rather than 90 percent) of the Australia/New Zealand visitor market.

Destinations

The following pages show the regions and communities visited by international visitors, including overall visitation (day or overnight), overnight visitation, and the average number of nights spent in each location (based to those who overnighted in each location). The following map shows how the regions are defined. The Inside Passage region is referred to as Southeast for this report.

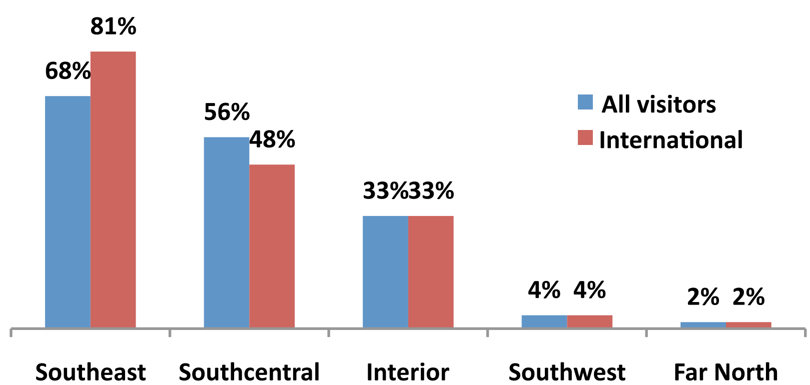
Alaska Regional Map

International visitors were most likely to visit Southeast (81 percent), followed by Southcentral (48 percent), Interior (33 percent), Southwest (4 percent), and Far North (2 percent). Compared to the total visitor market, international visitors were more likely to visit Southeast (81 versus 68 percent), and less likely to visit Southcentral (48 versus 56 percent). These differences reflect the international market's higher proportion of cruise visitors (who are more likely to visit Southeast), and lower proportion of air visitors (who are more likely to visit Southcentral).

Regional visitation varied significantly between individual markets, generally reflecting each market's propensity to travel by cruise ship versus highway/ferry. Australia/New Zealand visitors were the most likely to visit Southeast at 96 percent. This compares to 88 percent of UK visitors, 62 percent of Other Europe visitors, 61 percent of GSE visitors, 33 percent of Korean visitors, and 31 percent of Japanese visitors. Japanese visitors were the most likely to visit Southcentral (92 percent), followed by Other Europeans (87 percent). This compares to just 29 percent of the Australia/New Zealand market, and 37 percent of the UK market. The Swiss were the most likely to visit three regions: Interior (69 percent), Southwest (20 percent), and Far North (11 percent). GSE visitors also showed high visitation rates for the Interior (65 percent), while just 21 percent of Australia/New Zealand and 24 percent of the UK market visited the Interior.

Compared to 2006, international visitors in 2011 were slightly more likely to visit Southcentral (48 versus 43 percent). They were also more likely to visit the Interior in 2011 (33 versus 27 percent). The Southeast visitation rate grew slightly, from 80 to 81 percent. Visitation to the Far North fell from 4 to 2 percent, while visitation to Southwest changed from 3 to 4 percent.

CHART 21 - Regions Visited, All Visitors and International



In terms of specific communities, the international market was most likely to visit Juneau (73 percent), followed by Ketchikan (70 percent) and Skagway (61 percent). Compared to the overall market, international visitors showed higher visitation rates for cruise ports, and lower visitation rates for most Southcentral communities. Differences between individual markets reflect the regional differences detailed above.

TABLE 16 - Destinations Visited (Day or Overnight), By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Southeast	**68**	**81**	**31**	**33**	**96**
Juneau	61	73	25	33	91
Ketchikan	58	70	25	30	92
Skagway	49	61	23	30	64
Glacier Bay	24	25	8	1	31
Sitka	10	13	2	-	26
Hoonah/Icy Strait Point	8	9	-	1	9
Haines	6	8	-	-	6
Wrangell	1	2	<1	-	2
Prince of Wales Island	1	1	-	-	2
Petersburg	1	1	1	-	<1
Other Southeast	3	3	-	-	2
Southcentral	**56**	**48**	**92**	**85**	**29**
Anchorage	49	43	81	84	25
Kenai Peninsula	30	28	16	43	18
Seward	22	25	15	43	16
Kenai/Soldotna	10	8	3	4	4
Homer	19	8	1	2	3
Other Kenai Peninsula	4	2	-	1	1
Whittier	14	15	34	25	9
Talkeetna	13	13	19	35	4
Palmer/Wasilla	11	7	2	11	2
Girdwood/Alyeska	9	6	12	26	7
Portage	6	4	4	7	1
Prince William Sound	5	6	8	9	6
Valdez	4	7	8	11	3
Other Southcentral	9	6	13	2	2
Interior	**33**	**33**	**53**	**38**	**21**
Denali	28	29	49	23	20
Fairbanks	21	20	34	27	14
Tok	4	8	-	-	5
Glennallen	3	5	-	-	2
Other Interior	4	4	-	-	1
Southwest	**4**	**4**	**5**	**-**	**2**
Kodiak	2	1	4	-	1
Other Southwest	2	3	5	-	<1
Far North	**2**	**2**	**2**	**-**	**1**
Nome	<1	<1	-	-	-
Other Far North	2	2	2	-	1

TABLE 16 - Destinations Visited (Day or Overnight), By International Market (%) (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Southeast	**88**	**61**	**61**	**58**	**62**
Juneau	86	39	36	37	51
Ketchikan	83	32	30	33	35
Skagway	78	38	44	32	35
Glacier Bay	34	13	9	20	10
Sitka	6	<1	1	1	12
Hoonah/Icy Strait Point	3	13	12	9	16
Haines	8	21	16	32	13
Wrangell	1	6	7	4	5
Prince of Wales Island	<1	<1	<1	1	<1
Petersburg	1	<1	1	<1	1
Other Southeast	4	1	1	2	3
Southcentral	**37**	**70**	**66**	**83**	**87**
Anchorage	30	65	60	76	83
Kenai Peninsula	17	53	51	60	65
Seward	14	46	45	52	54
Kenai/Soldotna	6	21	19	26	22
Homer	5	21	21	19	32
Other Kenai Peninsula	2	9	9	8	9
Whittier	13	24	20	30	20
Talkeetna	8	24	21	27	29
Palmer/Wasilla	2	22	18	31	26
Girdwood/Alyeska	3	10	14	6	9
Portage	2	7	7	9	13
Prince William Sound	3	9	8	11	12
Valdez	2	21	19	23	25
Other Southcentral	6	16	16	17	20
Interior	**24**	**65**	**63**	**69**	**63**
Denali	22	48	51	47	55
Fairbanks	13	41	41	45	40
Tok	4	30	27	40	16
Glennallen	1	19	19	22	20
Other Interior	3	14	11	16	12
Southwest	**2**	**10**	**5**	**20**	**14**
Kodiak	1	2	1	4	6
Other Southwest	2	9	4	19	8
Far North	**1**	**6**	**3**	**11**	**8**
Nome	-	1	-	4	-
Other Far North	1	4	3	7	8

TABLE 17 - Overnight Destinations, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Southcentral	**48**	**43**	**75**	**85**	**24**
Anchorage	39	38	55	81	21
Kenai Peninsula	18	17	8	5	8
Seward	1	13	8	5	5
Kenai/Soldotna	6	5	<1	-	3
Homer	5	5	-	<1	<1
Other Kenai Peninsula	3	2	-	-	1
Talkeetna	7	9	17	2	2
Palmer/Wasilla	4	4	-	-	<1
Valdez	3	7	8	8	3
Girdwood/Alyeska	3	3	9	18	4
Whittier	1	2	4	-	<1
Portage	1	1	-	-	-
Prince William Sound	<1	<1	4	1	-
Other Southcentral	6	5	10	-	1
Interior	**32**	**33**	**53**	**29**	**20**
Denali	26	27	49	14	18
Fairbanks	20	19	26	26	14
Tok	4	7	-	-	4
Glennallen	2	3	-	-	<1
Other Interior	2	3	-	-	1
Southeast	**10**	**10**	**2**	**3**	**5**
Juneau	3	4	1	3	2
Skagway	3	5	-	-	2
Ketchikan	2	1	1	-	2
Sitka	2	1	2	-	1
Haines	1	3	-	-	1
Prince of Wales Island	1	<1	-	-	-
Petersburg	<1	<1	1	-	<1
Glacier Bay	<1	1	-	-	<1
Wrangell	<1	1	-	-	1
Hoonah/Icy Strait Point	<1	<1	-	-	-
Other Southeast	1	<1	-	-	<1
Southwest	**2**	**3**	**5**	**-**	**<1**
Kodiak	1	1	4	-	-
Other Southwest	1	2	5	-	<1
Far North	**1**	**1**	**1**	**-**	**<1**
Nome	<1	<1	-	-	-
Other Far North	1	1	1	-	<1

TABLE 17 - Overnight Destinations, By International Market (%) (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Southcentral	**29**	**68**	**65**	**78**	**76**
Anchorage	26	60	56	70	73
Kenai Peninsula	8	50	46	58	42
Seward	6	36	36	40	39
Kenai/Soldotna	2	17	13	25	10
Homer	3	17	17	17	25
Other Kenai Peninsula	2	7	8	7	3
Talkeetna	7	15	10	22	22
Palmer/Wasilla	2	10	9	12	13
Valdez	2	20	18	22	24
Girdwood/Alyeska	1	4	6	2	5
Whittier	1	6	5	3	6
Portage	-	3	1	6	2
Prince William Sound	-	1	1	1	1
Other Southcentral	6	14	14	14	13
Interior	**25**	**63**	**62**	**69**	**62**
Denali	19	43	44	46	51
Fairbanks	13	38	38	42	38
Tok	3	29	26	39	10
Glennallen	1	14	14	17	11
Other Interior	1	10	7	11	10
Southeast	**5**	**28**	**30**	**25**	**24**
Juneau	3	7	6	5	14
Skagway	3	19	22	17	13
Ketchikan	1	1	1	<1	2
Sitka	<1	<1	1	1	1
Haines	1	10	12	10	8
Prince of Wales Island	<1	<1	<1	-	<1
Petersburg	-	<1	-	<1	-
Glacier Bay	1	2	1	3	5
Wrangell	1	2	1	4	2
Hoonah/Icy Strait Point	-	-	-	-	<1
Other Southeast	<1	<1	<1	1	1
Southwest	**2**	**9**	**3**	**19**	**5**
Kodiak	1	2	1	3	1
Other Southwest	2	7	3	17	5
Far North	**1**	**3**	**2**	**6**	**6**
Nome	-	1	-	4	-
Other Far North	1	2	2	3	6

Visitors were shown a list of activities and asked which of them they participated in while in Alaska. Compared to the overall visitor market, international visitors tended to report similar participation rates for most activities, with a few exceptions. International visitors were particularly less likely to participate in fishing, at 5 percent, compared to 20 percent of all visitors. International visitors also visited friends/relatives at a much lower rate (6 percent, compared to 19 percent of all visitors).

Among all international visitors, Japanese visitors were less likely to participate in shopping and cultural activities, and more likely to participate in day cruises, flightseeing, Alaska railroad, shows/Alaska entertainment, and Northern Lights viewing. Korean visitors also reported lower rates of shopping but were unique in their high rate of museum visitation (77 percent) as well as participation in city/sightseeing tours (66 percent). The Australia/New Zealand market showed high rates for shopping, cultural activities, city/sightseeing tours, and tramway/gondola. The UK market showed a high rate of participation in wildlife viewing. GSE visitors were also highly likely to participate in wildlife viewing; they also showed very high rates for outdoor activities such as camping, hiking, and biking.

Participation rates among international visitors in 2011 generally resembled those of 2006, with a few exceptions. Participation in cultural activities increased from 47 to 57 percent, largely due to an increase in the category of historical/cultural attractions (from 15 to 29 percent). Participation in birdwatching fell from 19 to 8 percent. Participation in shows/Alaska entertainment grew from 8 to 14 percent.

CHART 22 – Top 10 Activities in Alaska, International Visitors

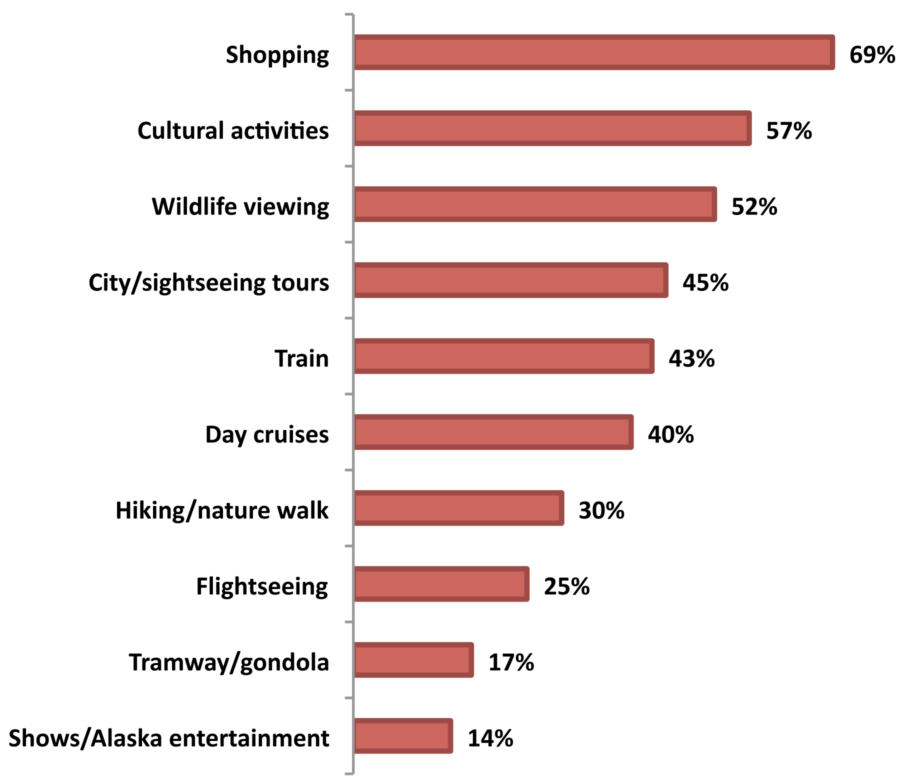


TABLE 18 - Activity Participation, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Shopping	69	69	49	46	74
Wildlife viewing	52	52	47	31	43
Birdwatching	12	8	2	8	2
Cultural activities	49	57	39	79	61
Museums	27	34	31	77	39
Historical/cultural attractions	25	29	4	5	41
Native cultural tours/ activities	17	16	4	7	16
Gold panning/mine tour	15	11	5	4	8
City/sightseeing tours	39	45	39	66	53
Train	38	43	52	32	41
White Pass/Yukon Route	26	31	4	30	31
Alaska Railroad	20	17	49	3	16
Hiking/nature walk	38	30	32	15	28
Day cruises	32	40	46	52	28
Fishing	20	5	2	1	5
Guided fishing	11	3	2	-	2
Unguided fishing	10	3	-	1	3
Visiting friends/relatives	19	6	11	4	3
Flightseeing	16	25	43	33	24
Shows/Alaska entertainment	13	14	21	7	14
Tramway/gondola	12	17	2	5	26
Salmon bake	10	9	2	1	14
Dog sledding	9	11	6	11	12
Camping	7	9	-	1	3
Kayaking/canoeing	7	9	-	-	7
Business	7	2	10	12	1
Rafting	6	6	1	1	8
Zipline	5	3	4	-	8
ATV/4-wheeling	5	3	-	1	4
Biking	5	7	1	2	4
Northern lights viewing	2	3	27	-	1
Hunting	1	<1	-	-	-
Other	4	2	3	5	1

TABLE 18 - Activity Participation, By International Market (%) (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Shopping	64	73	66	81	74
Wildlife viewing	59	62	61	68	73
Birdwatching	10	15	10	24	17
Cultural activities	53	47	40	51	64
Museums	33	33	29	31	52
Historical/cultural attractions	25	25	21	30	32
Native cultural tours/ activities	14	8	11	5	12
Gold panning/mine tour	13	11	9	17	8
City/sightseeing tours	31	23	33	10	34
Train	46	29	35	23	28
White Pass/Yukon Route	39	15	19	9	15
Alaska Railroad	16	16	17	16	20
Hiking/nature walk	23	49	44	63	54
Day cruises	45	47	46	49	59
Fishing	4	12	11	14	8
Guided fishing	3	6	4	8	5
Unguided fishing	1	9	9	10	4
Visiting friends/relatives	4	10	11	7	18
Flightseeing	20	17	17	15	28
Shows/Alaska entertainment	18	5	5	5	15
Tramway/gondola	16	15	15	14	17
Salmon bake	5	5	7	3	14
Dog sledding	8	3	4	1	13
Camping	6	35	30	47	17
Kayaking/canoeing	11	9	9	8	15
Business	3	2	3	1	1
Rafting	4	9	9	10	9
Zipline	-	-	-	-	<1
ATV/4-wheeling	5	2	3	1	3
Biking	9	11	8	18	14
Northern lights viewing	2	1	2	1	7
Hunting	-	<1	<1	-	-
Other	5	4	5	1	2

Compared to Expectations

When asked how well their Alaska trip met their expectations, 60 percent of international visitors said it was either higher or much higher than expectations, slightly less than the overall visitor rate of 63 percent. Three percent said the trip was below expectations (about equal to the overall visitor rate). The overall compared-to-expectations rating was 3.8 on a 1-5 scale, slightly lower than the overall visitor average of 3.9.

Ratings were highest among Japanese and UK visitors, 31 and 27 percent of whom (respectively) said their trip was much higher than their expectations. Korean visitors gave by far the lowest ratings – only 10 percent said the trip was much higher than their expectations, and 15 percent said the trip fell below expectations.

Compared to 2006, international visitors in 2011 were more likely to say their Alaska trip was about what they expected (37 percent, versus 29 percent in 2006). International visitors were less likely to say the trip was much higher than their expectations (23 percent, versus 28 percent in 2006); however, they were also less likely to say the trip fell below their expectations (3 percent, versus 10 percent in 2006).

TABLE 19 - Alaska Trip Compared to Expectations, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
5 - Much higher than expectations	26	23	31	10	15
4 - Higher than expectations	37	37	14	21	41
3 - About what you expected	34	37	51	53	41
2 - Below expectations	2	2	4	15	2
1 - Far below expectations	<1	1	-	-	-
Average 1-5	**3.9**	**3.8**	**3.7**	**3.3**	**3.7**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
5 - Much higher than expectations	27	14	16	13	21
4 - Higher than expectations	41	49	51	48	44
3 - About what you expected	29	35	32	37	29
2 - Below expectations	1	1	1	2	6
1 - Far below expectations	3	-	-	-	-
Average 1-5	**3.9**	**3.8**	**3.8**	**3.7**	**3.8**

Note: Business visitors were screened out of this question. * Sample size too small for analysis.

Value for the Money

Visitors were asked how Alaska rated in terms of value for the money in comparison to other vacation destinations visited in the last five years. Just over half of international visitors said the value was about the same, 33 percent said the value was better, and 13 percent said the value was worse. Ratings closely matched those of the overall visitor market.

Among the different markets, Japanese gave the highest value-for-money ratings, with 50 percent saying the value was better. Koreans and Germans gave the lowest ratings, with 11 and 21 percent saying the value was better, respectively.

Compared to 2006, fewer international visitors said that value-for-the-money was worse than other destinations – 13 percent, compared to 19 percent in 2006. The percentage that said the value was about the same increased from 48 to 55 percent.

TABLE 20 - Value for the Money
Compared with other vacation destinations visited in the past five years
By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
5 - Much better	13	12	13	5	15
4 - Better	24	21	37	11	25
3 - About the same	50	55	38	66	58
2 - Worse	12	12	10	16	2
1 - Much worse	2	1	1	3	-
Average 1-5	**3.3**	**3.3**	**3.5**	**3.0**	**3.5**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
5 - Much better	4	3	2	4	15
4 - Better	16	21	19	17	29
3 - About the same	61	58	54	68	40
2 - Worse	18	16	22	10	11
1 - Much worse	1	2	3	-	5
Average 1-5	**3.0**	**3.1**	**2.9**	**3.2**	**3.4**

Note: Business visitors were screened out of this question. * Sample size too small for analysis.

Satisfaction with Overall Experience

Virtually all international visitors (98 percent) were either satisfied or very satisfied with their overall Alaska experience. However, ratings were somewhat lower than those of the overall visitor market, with 65 percent of international visitors very satisfied, compared to 71 percent of all visitors. Australia/New Zealand visitors showed the highest ratings (72 percent very satisfied), followed by Other Europe (69 percent), UK (63 percent), Germany (61 percent), GSE (59 percent), Switzerland (50 percent), Japan (46 percent), and Korea (11 percent). Although Japan and Korean showed the lowest ratings, very few respondents in either of these subgroups said they were dissatisfied or very dissatisfied with their overall experience.

The rate of international visitors who were very satisfied with their overall Alaska experience stayed the same between 2006 and 2011. The percentage saying they were dissatisfied dropped from 3 to 1 percent.

CHART 23 - Satisfaction with Overall Alaska Experience, All Visitors and International

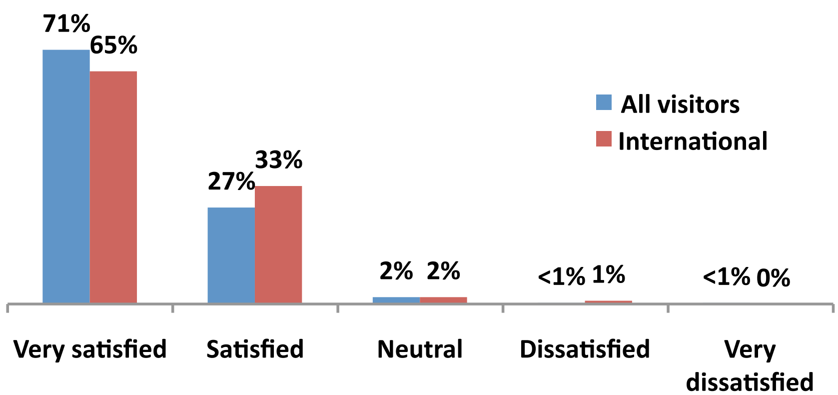


TABLE 21 - Satisfaction with Overall Alaska Experience, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
5 - Very satisfied	71	65	46	11	72
4 - Satisfied	27	33	46	78	28
3 - Neither/neutral	2	2	7	10	1
2 - Dissatisfied	<1	1	1	1	-
1 - Very dissatisfied	<1	-	-	-	-
Average 1-5	**4.7**	**4.6**	**4.4**	**4.0**	**4.7**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
5 - Very satisfied	63	59	61	50	69
4 - Satisfied	34	38	38	46	31
3 - Neither/neutral	<1	2	1	4	-
2 - Dissatisfied	3	<1	<1	-	-
1 - Very dissatisfied	-	-	-	-	-
Average 1-5	**4.6**	**4.6**	**4.6**	**4.5**	**4.7**

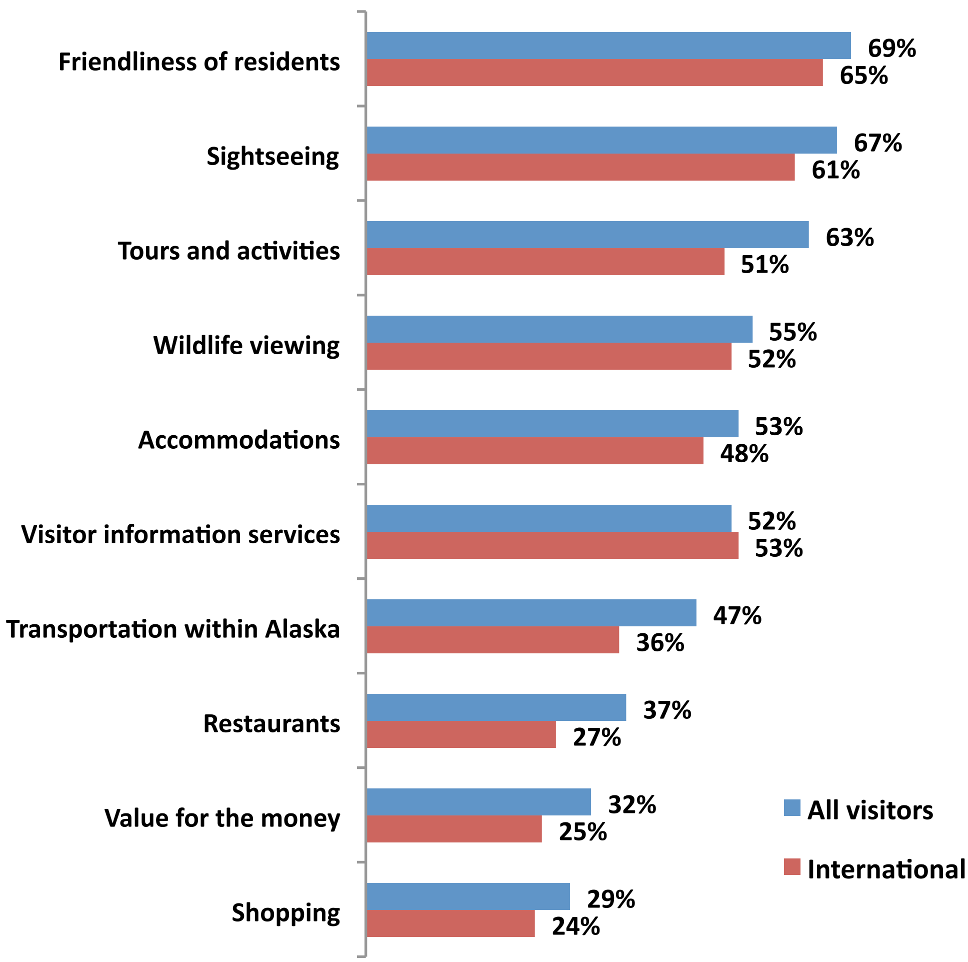
Satisfaction by Category

Visitors were asked to rate their satisfaction with a wide array of categories. The following chart and table shows the "very satisfied" ratings only; all responses are shown in tables on the following pages.

Compared to the overall visitor market, international visitors gave lower satisfaction ratings in every category, with the exception of visitor information services. The largest differences were in tours and activities (51 percent very satisfied, compared to 63 percent among all visitors), transportation within Alaska (36 versus 47 percent), restaurants (27 versus 37 percent), and value for the money (25 versus 32 percent). As with the previous question, although satisfaction levels were lower than the overall market, there were still very few dissatisfied ratings (between 1 and 6 percent for each category).

Compared to 2006, satisfaction ratings among international dropped in eight out of ten categories. The larger declines occurred in restaurants (from 43 to 27 percent very satisfied), accommodations (from 55 to 48 percent), and transportation within Alaska (from 42 to 36 percent). Ratings increased for shopping (from 21 to 24 percent very satisfied) and wildlife viewing (from 44 to 52 percent).

CHART 24 - Percent Very Satisfied by Category, All Visitors and International



By market, ratings differences tended to reflect the differences in the overall trip ratings. Australia/New Zealand visitors gave the highest very satisfied ratings in six out of ten categories, while UK visitors gave the highest ratings in two categories. Japanese and Korean visitors tended to give much lower ratings.

TABLE 22 - Satisfaction Ratings: % "Very Satisfied, "By International Market

	All visitors	International	Japan	Korea	Aust./NZ
Friendliness of residents	69	65	35	18	68
Sightseeing	67	61	36	36	68
Tours and activities	63	51	37	21	57
Wildlife viewing	55	52	39	24	46
Accommodations	53	48	29	44	71
Visitor information services	52	53	11	51	62
Transportation within Alaska	47	36	14	17	44
Restaurants	37	27	17	29	32
Value for the money	32	25	7	5	40
Shopping	29	24	17	3	33
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Friendliness of residents	75	69	64	75	70
Sightseeing	66	47	53	38	49
Tours and activities	54	56	63	49	40
Wildlife viewing	52	52	48	61	62
Accommodations	56	29	34	20	29
Visitor information services	61	48	56	40	54
Transportation within Alaska	42	31	33	26	41
Restaurants	35	20	20	19	19
Value for the money	24	14	11	21	19
Shopping	17	20	14	29	21

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

TABLE 23 - Satisfaction Ratings, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Accommodations					
5 - Very satisfied	53	48	29	44	71
4 - Satisfied	39	44	60	42	26
3 - Neither/neutral	6	6	9	10	1
2 - Dissatisfied	2	2	2	3	1
1 - Very dissatisfied	<1	1	<1	-	-
Average 1-5	**4.4**	**4.4**	**4.1**	**4.3**	**4.7**
Restaurants					
5 - Very satisfied	37	27	17	29	32
4 - Satisfied	49	51	35	30	46
3 - Neither/neutral	12	18	37	25	15
2 - Dissatisfied	2	3	11	13	4
1 - Very dissatisfied	1	1	1	3	3
Average 1-5	**4.2**	**4.0**	**3.6**	**3.7**	**4.0**
Shopping					
5 - Very satisfied	29	24	17	3	33
4 - Satisfied	48	46	41	30	44
3 - Neither/neutral	19	25	37	56	20
2 - Dissatisfied	3	4	5	11	3
1 - Very dissatisfied	1	1	-	-	<1
Average 1-5	**4.0**	**3.9**	**3.7**	**3.2**	**4.1**
Visitor Information Services					
5 - Very satisfied	52	53	11	51	62
4 - Satisfied	40	38	28	41	32
3 - Neither/neutral	7	7	58	7	4
2 - Dissatisfied	1	1	2	2	-
1 - Very dissatisfied	<1	1	-	-	2
Average 1-5	**4.4**	**4.4**	**3.5**	**4.4**	**4.5**
Sightseeing					
5 - Very satisfied	67	61	36	36	68
4 - Satisfied	30	34	42	58	30
3 - Neither/neutral	3	5	21	5	<1
2 - Dissatisfied	<1	1	<1	1	2
1 - Very dissatisfied	<1	-	-	-	-
Average 1-5	**4.6**	**4.5**	**4.1**	**4.3**	**4.6**

TABLE 23 - Satisfaction Ratings, By International Market (%) (cont'd)

	All visitors	International	Japan	Korea	Aust./NZ
Tours and activities					
5 - Very satisfied	63	51	37	21	57
4 - Satisfied	31	43	51	65	39
3 - Neither/neutral	5	5	11	11	2
2 - Dissatisfied	1	1	2	1	2
1 - Very dissatisfied	<1	<1	-	-	<1
Average 1-5	**4.6**	**4.4**	**4.2**	**4.1**	**4.5**
Wildlife viewing					
5 - Very satisfied	55	52	39	24	46
4 - Satisfied	32	34	45	41	39
3 - Neither/neutral	9	8	12	33	7
2 - Dissatisfied	3	5	3	2	8
1 - Very dissatisfied	1	1	1	-	-
Average 1-5	**4.4**	**4.3**	**4.2**	**3.9**	**4.2**
Transportation within Alaska					
5 - Very satisfied	47	36	14	17	44
4 - Satisfied	43	50	57	34	40
3 - Neither/neutral	8	13	17	47	16
2 - Dissatisfied	2	2	11	1	<1
1 - Very dissatisfied	<1	<1	1	-	-
Average 1-5	**4.4**	**4.2**	**3.7**	**3.7**	**4.3**
Friendliness of residents					
5 - Very satisfied	69	65	35	18	68
4 - Satisfied	26	30	33	69	30
3 - Neither/neutral	4	4	30	6	2
2 - Dissatisfied	1	1	1	7	-
1 - Very dissatisfied	<1	-	-	-	-
Average 1-5	**4.6**	**4.6**	**4.0**	**4.0**	**4.7**
Value for the money					
5 - Very satisfied	32	25	7	5	40
4 - Satisfied	46	53	45	40	50
3 - Neither/neutral	16	18	35	48	9
2 - Dissatisfied	5	3	12	8	1
1 - Very dissatisfied	1	1	<1	-	-
Average 1-5	**4.0**	**4.0**	**3.5**	**3.4**	**4.3**

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

TABLE 23 - Satisfaction Ratings, By International Market (%) (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Accommodations					
5 - Very satisfied	56	29	34	20	29
4 - Satisfied	37	56	51	64	58
3 - Neither/neutral	1	13	13	14	12
2 - Dissatisfied	5	2	2	2	<1
1 - Very dissatisfied	-	<1	<1	-	<1
Average 1-5	**4.4**	**4.1**	**4.2**	**4.0**	**4.2**
Restaurants					
5 - Very satisfied	35	20	20	19	19
4 - Satisfied	45	52	48	56	55
3 - Neither/neutral	20	23	27	17	22
2 - Dissatisfied	1	4	3	6	4
1 - Very dissatisfied	-	1	1	2	<1
Average 1-5	**4.1**	**3.8**	**3.8**	**3.9**	**3.9**
Shopping					
5 - Very satisfied	17	20	14	29	21
4 - Satisfied	43	55	57	47	48
3 - Neither/neutral	28	21	25	20	29
2 - Dissatisfied	10	3	3	4	1
1 - Very dissatisfied	2	1	1	-	<1
Average 1-5	**3.6**	**3.9**	**3.8**	**4.0**	**3.9**
Visitor Information Services					
5 - Very satisfied	61	48	56	40	54
4 - Satisfied	27	42	37	42	41
3 - Neither/neutral	11	5	6	2	6
2 - Dissatisfied	-	6	1	16	<1
1 - Very dissatisfied	<1	-	-	-	-
Average 1-5	**4.5**	**4.3**	**4.5**	**4.1**	**4.5**
Sightseeing					
5 - Very satisfied	66	47	53	38	49
4 - Satisfied	28	48	41	60	46
3 - Neither/neutral	5	4	5	3	5
2 - Dissatisfied	1	-	-	-	<1
1 - Very dissatisfied	-	-	-	-	-
Average 1-5	**4.6**	**4.4**	**4.5**	**4.4**	**4.4**

TABLE 23 - Satisfaction Ratings, By International Market (%) (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Tours and activities					
5 - Very satisfied	54	56	63	49	40
4 - Satisfied	44	35	24	47	54
3 - Neither/neutral	1	8	12	4	7
2 - Dissatisfied	1	1	1	-	-
1 - Very dissatisfied	-	-	-	-	-
Average 1-5	**4.5**	**4.5**	**4.5**	**4.4**	**4.3**
Wildlife viewing					
5 - Very satisfied	52	52	48	61	62
4 - Satisfied	35	35	32	35	34
3 - Neither/neutral	9	11	17	3	3
2 - Dissatisfied	4	2	3	1	1
1 - Very dissatisfied	-	-	-	-	-
Average 1-5	**4.3**	**4.4**	**4.2**	**4.6**	**4.6**
Transportation within Alaska					
5 - Very satisfied	42	31	33	26	41
4 - Satisfied	52	56	48	70	46
3 - Neither/neutral	1	12	18	2	11
2 - Dissatisfied	6	1	1	2	2
1 - Very dissatisfied	-	<1	<1	-	<1
Average 1-5	**4.3**	**4.2**	**4.1**	**4.2**	**4.3**
Friendliness of residents					
5 - Very satisfied	75	69	64	75	70
4 - Satisfied	25	25	27	23	26
3 - Neither/neutral	<1	3	4	1	4
2 - Dissatisfied	-	3	5	-	<1
1 - Very dissatisfied	-	-	-	-	-
Average 1-5	**4.7**	**4.6**	**4.5**	**4.7**	**4.7**
Value for the money					
5 - Very satisfied	24	14	11	21	19
4 - Satisfied	44	53	50	50	63
3 - Neither/neutral	30	28	30	28	12
2 - Dissatisfied	2	5	7	1	3
1 - Very dissatisfied	-	<1	1	-	2
Average 1-5	**3.9**	**3.8**	**3.6**	**3.9**	**3.9**

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

Recommending Alaska

Seven out of ten international visitors (72 percent) said they were very likely to recommend Alaska as a vacation destination to their friends and family, while another 27 percent were likely to do so. (This compares to 78 and 20 percent of the overall visitor market.) Only 1 percent said they were unlikely to do so. Likelihood was highest among Australia/New Zealand visitors at 76 percent very likely, followed by Swiss visitors at 72 percent and UK visitors at 71 percent.

Compared to 2006, international visitors in 2011 were slightly more likely to recommend Alaska to friends/family (72 percent very likely, compared to 69 percent in 2006). The percentage who said they were unlikely to recommend Alaska fell from 6 to less than 1 percent.

TABLE 24 - Likelihood of Recommending Alaska to Friends/Family By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Very likely	78	72	54	59	76
Likely	20	27	44	35	24
Unlikely	1	<1	1	3	-
Very unlikely	<1	<1	-	-	-
Don't know	1	<1	1	2	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Very likely	71	64	56	72	56
Likely	28	34	41	26	41
Unlikely	-	1	1	1	3
Very unlikely	1	-	-	-	-
Don't know	1	2	2	1	<1

Returning to Alaska

Eighteen percent of international visitors said they were very likely to return to Alaska in the next five years. Another 26 percent said they were likely to do so. Likelihood of returning was highest among Japanese visitors at 34 percent very likely, followed by Other European visitors at 24 percent. It is interesting to note that intention to return was relatively high among Japanese and Korean visitors, who showed the lowest satisfaction ratings. Likelihood of returning was lowest among Australia/New Zealand visitors at 5 percent very likely.

Likelihood of returning to Alaska fell between 2006 and 2011, with those saying they were very likely to return dropping from 26 to 18 percent.

TABLE 25 - Likelihood of Returning to Alaska in Next Five Years By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Very likely	38	18	34	23	5
Likely	23	26	37	30	28
Unlikely	19	28	8	11	31
Very unlikely	7	13	5	31	20
Don't know	13	15	16	5	16
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Very likely	16	19	18	20	24
Likely	12	38	34	47	33
Unlikely	40	26	28	19	20
Very unlikely	20	5	8	<1	8
Don't know	12	12	13	13	14

Previous Alaska Travel

Nearly nine out of ten international visitors in summer 2011 were on their first visit to Alaska. That figure is lowest among Swiss visitors, at 57 percent, and highest among Australia/New Zealand visitors, at 96 percent. International visitors were much more likely than the overall visitor market to be on their first trip to Alaska (86 versus 62 percent). The repeat travel rate among international visitors in 2011 was similar to the 2006 rate (14 versus 12 percent).

TABLE 26 - Repeat Alaska Travel, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
First trip to Alaska	62	86	72	89	96
Been to Alaska before	38	14	28	10	4
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
First trip to Alaska	90	70	77	57	66
Been to Alaska before	10	30	23	43	34

Repeat international travelers reported an average number of 3.3 previous Alaska vacation trips, lower than the average among all visitors (5.0 trips). Most international subgroups were too small for analysis. Survey results show that Germans tended to report more previous trips when compared to Swiss visitors (average of 5.4 versus 2.9 previous trips, respectively).

TABLE 27 - Number of Previous Vacation Trips, By International Market (%)
Base: Repeat Visitors

	All Visitors	International	GSE	Germany	Switzerland
None	6	5	1	2	-
One	32	48	45	35	56
Two	17	11	15	13	18
Three to five	19	18	19	25	13
Six to ten	9	7	9	7	7
Eleven or more	8	7	11	16	6
Average # of trips	**5.0**	**3.3**	**4.2**	**5.4**	**2.9**

Notes: Those who said "none" had been to Alaska before, but not for vacation. Sample sizes for Japan, Korea, Australia/New Zealand, UK, and Other Europe were too small for analysis.

Repeat visitors were asked how they entered and exited the state on their last Alaska trip. Repeat international visitors most often traveled by air (72 percent). Twenty-nine percent had traveled by cruise ship; 18 percent by highway; and 7 percent by state ferry. Percentages add up to more than 100 percent because some visitors used different methods to enter and exit the state.

TABLE 28 - Entry/Exit Modes Used on Previous Trip, By International Market (%)
Base: Repeat Visitors

	All Visitors	International	GSE	Germany	Switzerland
Cruise ship	71	29	11	23	1
Air	29	72	54	55	49
Highway	9	18	36	24	50
State ferry	3	7	5	2	9
Other	1	<1	<1	-	-

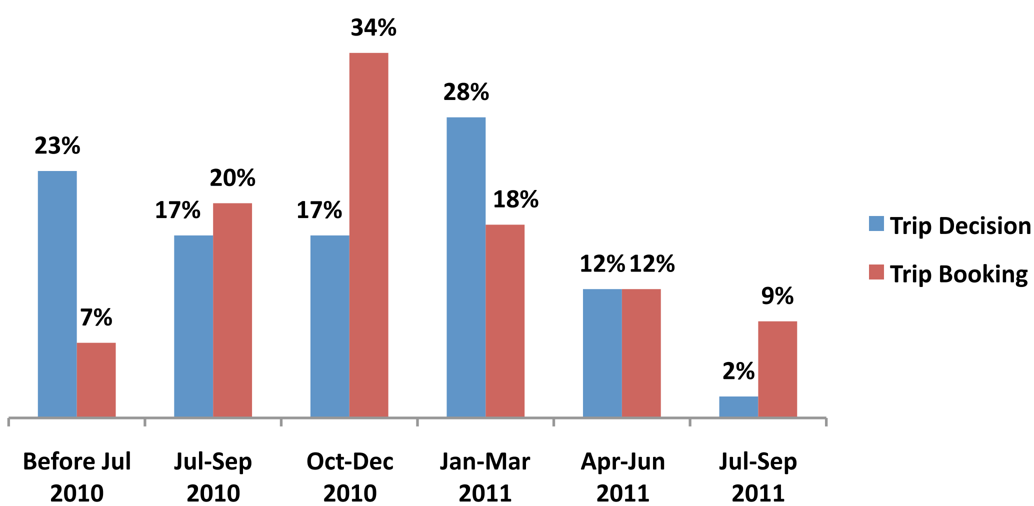
Note: Sample sizes for Japan, Korea, Australia/New Zealand, UK, and Other Europe were too small for analysis.

Trip Planning Timeline

Surveyed visitors were asked two questions about their trip planning timeline: how many months ahead of time they decided to come to Alaska, and how many months ahead of time they booked their major travel arrangements. The following chart show trip decision and booking timelines based on the calendar year. The timeline was determined by applying the number of months given by respondents to the month in which they participated in the survey.

The most common period of time for trip decision was January-March 2011 (28 percent). One-quarter of international visitors (23 percent) decided on their Alaska trip before July 2010. The most common time period for booking major travel arrangements was October-December 2010 (34 percent), followed by July-September 2010 (20 percent).

CHART 25 - Timeline of Alaska Trip Decision and Booking by Quarter



The tables on the following pages show trip planning timing by market, by quarter, as well as by number of months.

International visitors made their Alaska trip decision an average of 9.7 months ahead of time, compared to 8.6 months among all visitors. The average was highest among Australia/New Zealand visitors at 10.8 months and UK visitors at 10.4 months. The average was lowest among Korean visitors at 4.9 months and Japanese visitors at 5.1 months.

International visitors booked their major travel arrangements an average of 6.2 months ahead of time, about one month longer than the average among all visitors (5.4 months). The average was longest among Australia/New Zealand and UK visitors at 7.5 months; it was lowest among Korean visitors at 1.7 months.

The average lead time for the Alaska trip decision increased from 8.4 months in 2006 to 9.7 months in 2011. The average lead time for trip booking increased from 5.7 months to 6.2 months.

TABLE 29 - Timeline of Alaska Trip Decision by Quarter, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Before July 2010	16	23	6	6	33
July-Sept 2010	19	17	3	10	27
Oct-Dec 2010	18	17	2	-	7
Jan-March 2011	26	28	37	20	22
April-June 2011	16	12	47	36	12
July-Sept 2011	5	2	5	26	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Before July 2010	26	13	17	4	25
July-Sept 2010	18	12	11	16	12
Oct-Dec 2010	27	27	30	28	5
Jan-March 2011	23	32	27	43	36
April-June 2011	3	13	11	8	22
July-Sept 2011	3	3	4	2	1

TABLE 30 - Timeline of Alaska Trip Booking by Quarter, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Before July 2010	5	9	<1	-	16
July-Sept 2010	10	12	1	4	21
Oct-Dec 2010	17	18	-	-	16
Jan-March 2011	30	34	23	9	28
April-June 2011	26	20	60	40	15
July-Sept 2011	13	7	16	47	5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Before July 2010	12	3	2	<1	1
July-Sept 2010	19	7	11	3	4
Oct-Dec 2010	27	22	30	13	23
Jan-March 2011	33	42	33	61	23
April-June 2011	6	18	15	16	37
July-Sept 2011	3	8	10	7	12

TABLE 31 - Timeline of Alaska Trip Decision by Number of Months, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Less than one month	4	2	1	14	<1
One to three months	15	12	31	26	12
Four to six months	26	30	53	5	20
Seven to 11 months	17	17	1	-	18
One year or more	28	33	8	9	48
Don't know	10	6	4	45	3
Average # of months	**8.6**	**9.7**	**5.1**	**4.9**	**10.8**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Less than one month	1	3	4	1	3
One to three months	8	9	6	6	17
Four to six months	26	38	36	47	36
Seven to 11 months	26	20	18	25	9
One year or more	34	23	24	19	33
Don't know	5	8	12	2	2
Average # of months	**10.4**	**8.6**	**9.0**	**7.5**	**9.8**

TABLE 32 - Timeline of Alaska Trip Booking by Number of Months By International Market (%)

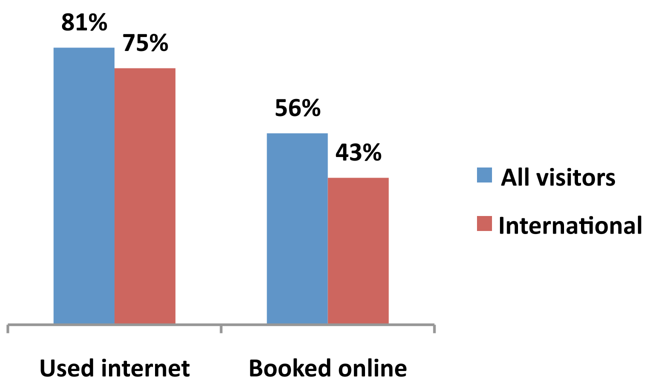
	All visitors	International	Japan	Korea	Aust./NZ
Less than one month	11	5	4	12	3
One to three months	26	21	46	45	16
Four to six months	32	36	46	1	29
Seven to 11 months	17	18	<1	-	19
One year or more	11	15	-	2	30
Don't know	4	5	2	40	2
Average # of months	**5.4**	**6.2**	**3.5**	**1.7**	**7.5**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Less than one month	1	4	6	2	4
One to three months	11	18	14	18	39
Four to six months	38	43	42	50	24
Seven to 11 months	25	23	22	27	28
One year or more	21	5	4	3	2
Don't know	4	8	13	<1	3
Average # of months	**7.5**	**5.7**	**5.9**	**5.2**	**4.7**

Internet Usage

Three-quarters of international visitors used the internet to plan their Alaska trip, including 43 percent who booked some portion of their trip online. When compared to the overall visitor market, international visitors were somewhat less likely to use the internet to plan their trip (75 compared to 81 percent); they also tended to book online at a lower rate (43 compared to 56 percent).

Internet usage among international visitors grew from 64 to 75 percent between 2006 and 2011, while online booking increased from 29 to 43 percent.

CHART 26 - Internet Usage and Online Booking, All Visitors and International



Internet usage was highest among Other Europeans and Swiss visitors (both at 88 percent), and GSE visitors (79 percent). Usage was lowest among Korean visitors (40 percent). Online booking rates were particularly high among Other Europeans (61 percent), followed by Swiss visitors at 44 percent.

TABLE 33 - Internet Usage, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Used internet	81	75	66	40	68
Research only	25	32	37	32	34
Research and book	56	43	30	8	33
Did not use internet	18	24	32	30	32
Don’t know	1	1	1	31	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Used internet	74	79	71	88	88
Research only	42	37	32	44	27
Research and book	32	42	40	44	61
Did not use internet	25	20	27	12	12
Don’t know	1	1	2	-	-

Among all international visitors, 25 percent booked their airfare over the internet, 19 percent booked tours, 17 percent booked a cruise, and 16 percent booked lodging. Most booking rates were lower than those of the overall visitor market, particularly for airfare (25 versus 44 percent). Among individual markets, GSE and Other European markets showed higher rates of booking both airfare and lodging online, when compared to all international visitors.

TABLE 34 - Trip Components Booked over Internet, International Visitors (%)

	All visitors	International	Japan	Korea	Aust./NZ
Airfare	44	25	*	*	*
Tours	22	19	*	*	*
Cruise	19	17	*	*	*
Lodging	19	16	*	*	*
Vehicle rental	11	8	*	*	*
Overnight packages	3	3	*	*	*
Ferry	2	3	*	*	*
Other	<1	<1	*	*	*
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Airfare	20	32	29	35	34
Tours	21	13	15	11	26
Cruise	10	5	3	10	11
Lodging	10	24	22	26	25
Vehicle rental	7	19	17	26	22
Overnight packages	2	3	4	2	17
Ferry	3	7	9	5	7
Other	-	-	-	-	<1

* Sample sizes for Japan, Korea, and Australia/New Zealand markets too small for analysis.

Travel Agent Usage

Over two-thirds of international visitors booked at least part of their Alaska trip through a travel agent. This rate is much higher than that of the total visitors market (47 percent). Travel agent usage was highest among the Australia/New Zealand (84 percent) and UK (78 percent) markets, and lowest among Other European and Korean markets, both at 51 percent.

Travel agent usage among international visitors fell slightly, from 72 percent in 2006 to 69 percent in 2011.

TABLE 35 - Travel Agent Usage, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Booked through travel agent	47	69	59	51	84
Did not book through travel agent	52	29	23	20	16
Don't know	2	2	18	31	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Booked through travel agent	78	62	59	65	51
Did not book through travel agent	22	36	38	35	48
Don't know	-	2	3	-	<1

Usage of State of Alaska Information Sources

Visitors were asked if they had used the official State of Alaska travel website, www.travelalaska.com. Thirty percent said they had, slightly higher than the overall visitor rate of 26 percent. The usage rate was higher among Swiss visitors (38 percent) and Other European visitors (35 percent). International visitor usage of travelalaska.com appears to have increased, from 22 percent in 2006 to 30 percent in 2011.

Ten percent of international visitors said they had received the State of Alaska Official Vacation Planner, lower than the overall visitor rate of 17 percent. Rates were highest among GSE visitors (27 percent). Rates were much lower among the other markets, ranging from 6 to 11 percent. The percentage of international visitors receiving the Vacation Planner increased from 9 percent in 2006 to 10 percent in 2011.

TABLE 36 - Usage of State of Alaska Information Sources, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Did you visit the official State of Alaska travel website? (www.travelalaska.com)					
Yes	26	30	10	5	26
No	68	63	87	91	67
Don't know	6	7	2	4	7
Did you receive the State of Alaska Official Vacation Planner?					
Yes	17	10	7	11	6
No	79	86	78	70	94
Don't know	4	4	15	18	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Did you visit the official State of Alaska travel website? (www.travelalaska.com)					
Yes	32	32	29	38	35
No	59	61	68	48	56
Don't know	8	7	3	14	9
Did you receive the State of Alaska Official Vacation Planner?					
Yes	6	27	27	27	8
No	89	70	69	70	88
Don't know	5	3	4	2	4

Usage of Other Information Sources

After visitors were asked about their usage of the internet, travel agents, and State of Alaska sources, they were shown a list of additional sources and asked to identify which they had used in planning their Alaska trip. The three most popular additional sources were each mentioned by 39 percent of international visitors: friends/family, cruise line, and brochures. Compared to the overall visitor market, international visitors were less likely to cite friends/family, prior experience, and AAA. International visitors were more likely to cite brochures, travel guide/book, tour company, and television.

Japanese visitors were particularly likely to cite travel guide/book and tour company. Korean visitors showed low rates of usage for most sources, with the exception of friends/family. Australia/New Zealand visitors primarily relied on cruise line, friends/family, and brochures; they also showed higher-than-average rates for tour company and television.

TABLE 37 - Additional Information Sources, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Friends/family	50	39	22	44	45
Cruise line	37	39	1	1	59
Prior experience	24	10	13	10	4
Brochures (net)	23	39	20	8	43
Community brochures	3	5	4	-	5
Ferry brochure/schedule	3	5	4	-	3
AAA	16	1	<1	1	2
Travel guide/book	12	21	49	5	15
Tour company	7	13	27	16	17
Television	6	15	14	10	16
Magazine	6	11	11	11	10
Hotel/lodge	5	7	6	2	5
Milepost	5	5	<1	-	3
Convention & Visitors Bureau(s)	5	5	6	2	7
Library	4	5	9	1	6
Newspaper	3	8	6	2	12
North to Alaska guide	2	2	<1	-	1
Cell phone apps	2	1	<1	-	-
Club/organization	1	<1	-	-	-
Travel/recreation exhibits	1	2	1	1	3
Other	2	2	-	-	5
None	9	10	7	11	8
Don't know	1	1	1	1	-

UK visitors resembled Australia/New Zealand visitors in primarily relying on cruise line, brochures, and friends/family. GSE visitors showed lower-than-average usage rates for friends/family, cruise line, and tour company; they were much more likely to cite prior experience, community brochures, travel guide/book, hotel/lodge, television, and magazine. Other European visitors showed low rates for friends/family and cruise line, and high rates for brochures, travel guide/book, and television.

TABLE 37 - Other Information Sources, By International Market (cont'd)

	UK	GSE	Germany	Switzerland	Other Europe
Friends/family	39	27	29	25	20
Cruise line	45	10	15	4	20
Prior experience	7	25	21	34	20
Brochures (net)	40	50	53	48	51
Community brochures	3	15	6	28	2
Ferry brochure/schedule	1	13	11	19	9
AAA	-	3	5	<1	5
Travel guide/book	23	38	33	50	31
Tour company	18	8	9	3	9
Television	8	16	20	10	17
Magazine	6	17	23	9	11
Convention & Visitors Bureau(s)	3	7	9	6	8
Milepost	4	13	11	17	12
Hotel/lodge	4	18	17	17	10
Library	4	11	9	17	7
Newspaper	6	2	4	1	1
North to Alaska guide	5	1	1	1	1
Cell phone apps	-	1	1	2	5
Club/organization	-	<1	<1	-	-
Travel/recreation exhibits	<1	2	2	1	2
Other	1	2	3	1	6
None	7	10	5	12	14
Don't know	<1	1	2	<1	3

Party Size

International visitors in the summer of 2011 reported an average party size of 2.5, matching the average among all visitors. (Party size was defined as those traveling in their immediate party, sharing expenses such as food, lodging and transportation.) The most common party size was two, accounting for 65 percent of all parties. Compared to the overall market, international visitors were more likely to travel in parties of two, and less likely to travel by themselves.

UK and GSE visitors showed slightly lower average party sizes, while Korean visitors showed a higher average party size.

Average party size among international visitors increased from 2.3 people in 2006 to 2.5 people in 2011.

TABLE 38 - Party Size, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
One	16	12	21	16	6
Two	57	65	63	26	82
Three	9	6	3	15	<1
Four	10	11	4	9	10
Five or more	8	7	10	32	2
Average party size	**2.5**	**2.5**	**2.2**	**3.4**	**2.2**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
One	13	15	19	8	25
Two	77	72	67	79	53
Three	4	7	7	7	5
Four	4	3	3	3	8
Five or more	2	4	5	3	9
Average party size	**2.1**	**2.1**	**2.1**	**2.2**	**2.3**

A second question asked for the number of people traveling in the respondent's group, including any friends or family they were traveling with (regardless of sharing expenses). The average group size among international visitors was 6.5 people, higher than the average among all visitors (5.1). Average group size was highest among Australia/New Zealand visitors at 8.5 people, followed by Other European visitors at 7.6 people. Average group size was lowest among GSE visitors at 2.6 people.

TABLE 39 - Group Size, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
One	11	9	19	20	6
Two	40	52	63	27	56
Three	8	6	1	11	1
Four	16	10	4	9	13
Five	4	3	5	2	2
Six to ten	13	7	2	31	-
Eleven or more	8	14	5	1	23
Average party size	**5.1**	**6.5**	**3.8**	**3.6**	**8.5**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
One	8	14	20	5	10
Two	66	64	57	74	55
Three	6	7	7	7	8
Four	8	5	4	8	4
Five	3	4	5	2	6
Six to ten	2	3	4	2	4
Eleven or more	8	2	2	2	13
Average party size	**4.3**	**2.6**	**2.7**	**2.6**	**7.6**

Age and Gender

International visitors reported a nearly even gender split in the summer of 2011 at 49 percent male, 51 percent female, just 1 percent off the ratio of the overall market. Korean, GSE, and Other European visitors were slightly more likely to be male, while Japanese and Australia/New Zealand visitors were slightly more likely to be female. The average age reported was 50.7 years, matching the average among all visitors. The lowest average age was among Other Europeans at 43.1; the highest average was among UK visitors at 59.0. Average age among international visitors dropped slightly between 2006 and 2011, from 51.7 to 50.7.

TABLE 40 - Age and Gender, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Gender					
Male	50	49	45	56	48
Female	50	51	55	44	52
Age					
Under 18	8	7	1	5	2
18 to 24	4	4	1	6	2
25 to 34	7	8	14	6	5
35 to 44	9	10	12	6	3
45 to 54	19	20	6	65	16
55 to 64	28	30	46	8	44
65 and older	24	21	20	5	28
Average age	**50.7**	**50.7**	**53.5**	**46.2**	**57.1**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Gender					
Male	50	54	55	53	57
Female	50	46	45	47	43
Age					
Under 18	<1	5	7	2	11
18 to 24	3	6	5	7	3
25 to 34	5	16	15	18	18
35 to 44	6	18	13	27	19
45 to 54	13	20	18	14	18
55 to 64	34	26	29	23	22
65 and older	40	10	12	8	9
Average age	**59.0**	**46.2**	**46.8**	**44.6**	**43.1**

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

Household Characteristics

One-quarter of international visitors in summer 2011 reported children living in their household. The rate was much higher among Korean visitors at 45 percent, and lowest among UK visitors at 9 percent.

TABLE 41 - Children Living In Household, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Children living in household	24	25	20	45	15
No children in household	75	74	74	55	83
Don't know	<1	1	6	-	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Children living in household	9	18	15	15	26
No children in household	91	82	84	85	74
Don't know	-	1	1	-	<1

The rate of international visitors who were retired or semi-retired (41 percent) matched that of the overall market. Retired rates were highest among UK visitors at 65 percent, and lowest among Korean visitors at 7 percent.

TABLE 42 - Retired or Semi-Retired, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Retired or semi-retired	41	41	47	7	51
Not retired	59	58	48	91	48
Don't know	1	1	6	2	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Retired or semi-retired	65	17	18	19	17
Not retired	35	81	80	81	80
Don't know	<1	2	3	-	3

About six in ten international visitors in the summer of 2011 had graduated from college, including 31 percent who attained an advanced degree. Educational attainment appeared to be higher among Japanese and Korean visitors, although differences in educational systems among the various countries may have influenced responses to this question.

TABLE 43 – Education, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Some high school	2	5	1	2	13
High school diploma/GED	12	15	15	5	20
Associate/technical degree	8	10	1	2	12
Some college	17	9	1	14	5
Graduated from college	33	28	57	58	28
Master's/Doctorate	27	31	21	16	17
Don't know	1	2	3	2	5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Some high school	4	2	3	-	2
High school diploma/GED	24	11	14	5	11
Associate/technical degree	9	12	12	14	10
Some college	17	7	3	11	13
Graduated from college	21	21	23	20	28
Master's/Doctorate	23	44	40	49	36
Don't know	2	3	4	<1	<1

International visitors reported an average household income of $107,000, matching the average among the overall visitor market. The average was highest among Swiss visitors at $118,000 and lowest among German visitors at $87,000. When visitors responded to this question in terms of a foreign currency, the amount was noted by the surveyor, then later converted to US currency using the latest published conversion rates.

TABLE 44 - Household Income, By International Market (%)

	All visitors	International	Japan	Korea	Aust./NZ
Less than $25,000	3	4	5	1	1
$25,000 to $50,000	10	10	4	4	11
$50,000 to $75,000	15	15	14	2	17
$75,000 to $100,000	16	14	8	9	18
$100,000 to $125,000	11	10	8	46	13
$125,000 to $150,000	9	7	21	5	8
$150,000 to $200,000	8	4	4	2	4
Over $200,000	8	10	2	5	4
Refused	22	27	33	24	24
Average income	**$107,000**	**$107,000**	**$104,000**	**$115,000**	**$97,000**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Less than $25,000	2	6	8	3	3
$25,000 to $50,000	11	4	5	1	11
$50,000 to $75,000	16	12	15	7	17
$75,000 to $100,000	8	23	14	37	18
$100,000 to $125,000	8	9	13	5	5
$125,000 to $150,000	8	6	5	9	4
$150,000 to $200,000	3	5	5	7	10
Over $200,000	7	5	2	11	9
Refused	37	30	33	19	23
Average income	**$101,000**	**$99,000**	**$87,000**	**$118,000**	**$107,000**

Expenditures Per Person

On average, international visitors spent $1,013 per person while in Alaska in summer 2011. This average is 8 percent above the average among all visitors of $941. Average per-person spending was highest among Japanese visitors at $3,440, and lowest among UK visitors at $531. Markets with the lowest averages (Australia/New Zealand and UK) were also the most likely to purchase cruise packages. The average spending figures exclude spending on cruise packages.

Readers are advised that spending at the individual market level carries a much higher margin of error than the other figures in this report, due to small sample sizes. The smaller sample sizes result from the exclusion of online responses, and a high number of "don't know" responses. Sample sizes are noted in the table below, and exclude "don't know" responses.

The 2011 average per-person spending figure of $1,013 represents an increase of 8 percent over the international visitor average of $936 in 2006. In terms of real (inflation-adjusted) dollars, average spending decreased by 5 percent. (Among all visitors, the decline in spending in terms of real dollars was more pronounced, at 11 percent.)

TABLE 45 - Visitor Expenditures in Alaska, Per Person, Overall Excluding Transportation to/from Alaska, By International Market (%)

	All visitors n=3,063	International n=510	Japan n=52	Korea	Aust./NZ n=55
Less than $500	47	50	8	*	45
$501 - $1,000	21	18	14	*	27
$1,001 - $2,500	15	10	15	*	6
$2,501 - $5,000	5	4	6	*	2
Over $5,000	2	3	28	*	3
Don't know	10	15	29	*	16
Average per person, per trip	**$941**	**$1,013**	**$3,440**	*	**$961**
	UK n=53	**GSE n=200**	**Germany n=124**	**Switzerland n=66**	**Other Europe n=78**
Less than $500	71	39	48	18	13
$501 - $1,000	11	14	11	24	7
$1,001 - $2,500	5	17	16	16	42
$2,501 - $5,000	3	11	8	13	10
Over $5,000	-	4	4	5	8
Don't know	10	15	12	23	20
Average per person, per trip	**$531**	**$1,446**	**$1,254**	**$1,805**	**$2,218**

*Sample size too small for analysis.
Notes: This data is based to intercept respondents only. Spending on cruise packages and ferry tickets to enter/exit state is excluded.

The following table provides information on average spending by category. (Sample sizes for individual markets were too small for analysis.) International visitors spent the largest portion of their expenditures on packages (not including cruises), at $275 per person, followed by tours/activities at $231, then gifts/souvenirs at $208.

Compared to the overall visitor market, international visitors showed somewhat different spending habits. They spent much more, on average, on packages (not including cruises). They also spent more on tours/activities and gifts/souvenirs. They spent less on lodging, food/beverage, and transportation.

TABLE 46 - International Visitor Expenditures in Alaska, Per Person, by Category

	All Visitors	International
Lodging	$116	$73
Tours/activities/entertainment	190	231
Gifts/souvenirs/clothing	175	208
Food/beverage	115	93
Cars/fuel/transportation	80	56
Package not including cruise	153	275
Other	112	77

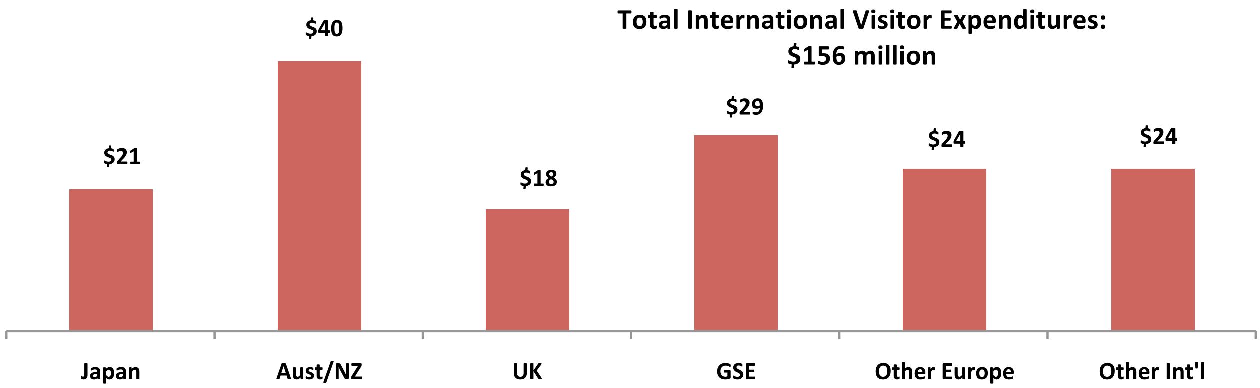
Notes: This data is based to intercept respondents only. Spending on cruise packages and ferry tickets to enter/exit state is excluded.

The spending figures above exclude spending on cruise or cruise/tour packages. A separate question asked international visitors who participated in a cruise how much they spent on their cruise or cruise/tour package. The average per-person cruise package price (without airfare) was $2,546. A separate question also asked visitors what they spent, per person, on ferry tickets. The average among international visitors was $356.

Total Expenditures

Spending by international visitors in Alaska totaled $156 million in summer 2011, excluding transportation costs to travel to and from the state and cruise packages. This figure represents 10 percent of the total spent by all Alaska visitors ($1.51 billion). Australia/New Zealand visitors made the greatest impact at $40 million, followed by GSE visitors at $29 million (including $15 million among German visitors and $13 million among Swiss visitors), Other European visitors at $24 million, Japanese visitors at $21 million, and UK visitors at $18 million. Spending by other international visitors (not included in the individual markets) totaled $24 million.

CHART 29 - Total International Visitor Expenditures in Alaska in Millions of Dollars By International Market



Notes: Expenditures by Swiss and German visitors are included in GSE total. Sample size among Korean visitors too small for analysis.

International visitors who participated in a cruise spent an additional $279 million on cruise or cruise/tour packages. This figure is derived from applying the percentage of international visitors who cruised to the total international volume, then multiplying the international cruise volume by the average spent on cruise packages.

Total spending by international visitors increased by 9 percent between 2006 and 2011, from $144 million to $156 million. In terms of real (inflation-adjusted) dollars, total spending actually decreased by 4 percent. This decline in real spending is less pronounced among international visitors than among the total visitor market (down 4 versus 13 percent).