AVSP 7 – Summer 2016

Section 19: International Visitors

McDowell GROUP

Introduction

This section presents visitor volume and survey results for Alaska's international visitors in summer 2016, for the total market as well as the individual markets of Asia, Japan, Australia/New Zealand, United Kingdom, German-Speaking Europe (GSE), Germany, Switzerland, and Other Europe. For this report (and previous AVSP reports), the term "international" excludes Canadians. A profile of Canadian visitors is provided in Section 10.

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

TABLE 19.1 – International Market Sample Sizes

Market	Sample Size 2016	Margin of Error
International Visitors (excludes Canadians)	781	±3.5%
Asia (Japan, Korea, China, India, Thailand, Taiwan, Other Asia)	106	±9.5%
Japan	51	±13.7%
Australia/New Zealand	136	±8.4%
United Kingdom	115	±9.1%
German-Speaking Europe (Germany, Switzerland, Austria)	223	±6.5%
Germany	156	±7.8%
Switzerland	49	±13.4%
Other Europe	146	±8.1%

Readers are advised to interpret survey results for international submarkets with some caution, particularly the markets with the lowest sample sizes: Japan and Switzerland.

The sample of international visitors decreased substantially from AVSP 6, from 1,220 to 781 (on par with the 2006 sample of 703). A variety of factors contributed to this decrease.

- In 2011, online surveys represented 53 percent of all surveys; in 2016, that percentage went down to 13 percent. (The reasons for the shift to the intercept method are discussed in Section 2.) Thus, the option of filling out the survey online in a foreign language was given to many fewer visitors in 2016.
  - A total of 570 out of 1,220 international surveys were filled out online in 2011. That number went down to 181 in 2016.
  - In 2011, German was one of the languages offered online (replaced by Mandarin in 2016), and 150 German language surveys were submitted. In comparison, only 10 Mandarin surveys were submitted.
- International flight boarding procedures were streamlined between 2011 and 2016. In both survey years, surveyors were not allowed into the secure area for international flights (unlike domestic flights). However, in 2011, it took airlines longer to check in international passengers, which allowed more time for surveying. By 2016, airlines had gotten more efficient at processing passengers, making it more difficult to conduct the (fairly lengthy) survey with passengers in the check-in area.

As in 2011, McDowell Group took efforts to boost sample sizes among international visitors.

- The international air sample was given a much higher target sample than its volume would suggest, in relation to the entire visitor market. In 2016, international air passengers represented 0.9 percent of all visitor exits. International air surveys represented 7 percent of all surveys.
- Every Asian charter flight out of the Anchorage and Fairbanks airports was sampled. Japanese and Korean interpreters were hired to accompany the survey team for every Asian-bound flight. However, many fewer Asia-bound flights occurred in 2016, compared to 2011. The number of passengers aboard Asia-bound flights decreased from 4,801 in 2011 to 1,997 in 2016 – from 23 percent of international passengers, to 9 percent. This greatly limited the opportunities to boost Asian market sample sizes.

In addition to the above challenges, there are cultural and language barriers that introduce respondent bias, particularly in the Asian markets. Consequently, market size estimates presented in the following section should be seen as conservative.

International Visitor Volume

An estimated 167,000 international visitors, not including Canadians, traveled to Alaska in summer 2016, up from 154,000 in summer 2011. The following table shows estimated market sizes for individual countries and regions.

Note that the margins of error presented in the previous section refer to the survey responses based to each sub-sample – not to the international country/region percentages and volumes in the table below, which are based on the total international sample, with a maximum margin of ±3.5 percent.

- Europeans represented the largest portion of international visitors at 38 percent, down slightly from 42 percent in 2011. Volume, however, stayed about the same (from 64,000 to 63,000).
- The Australia/New Zealand market was nearly as big as the European market at 36 percent (61,000 visitors). This market increased their share of the international market from 27 to 36 percent, representing an increase in volume from 42,000 to 61,000. The New Zealand market grew at a higher rate, from 4 to 10 percent (from 6,000 to 17,000).
- The Asian market grew from 12 to 14 percent, or from 18,000 to 23,000 travelers. The Indian market appears to have grown faster, from 2 to 5 percent of all international travelers. (Note that representation of Asian markets may have been constrained in the survey sample by cultural and language barriers. These estimates should be considered conservative.)

TABLE 19.2 - Countries of Origin and Estimated Market Size

	% of Int'l 2011	% of Int'l 2016	Estimated Volume 2011	Estimated Volume 2016
Europe	**42%**	**38%**	**64,000**	**63,000**
United Kingdom	21	17	33,000	28,000
German-Speaking Europe	13	12	20,000	20,000
Germany	8	9	12,000	15,000
Switzerland	5	2	7,000	3,000
Austria	1	1	1,000	2,000
Other Europe	7	7	11,000	12,000
Netherlands	2	2	3,000	3,000
Italy	n/a	2	n/a	3,000
Australia/New Zealand	**27%**	**36%**	**42,000**	**61,000**
Australia	23	26	36,000	44,000
New Zealand	4	10	6,000	17,000
Asia	**12%**	**14%**	**18,000**	**23,000**
India	2	5	3,000	8,000
Japan	4	3	6,000	6,000
China	2	3	3,000	5,000
Korea	1	1	2,000	2,000
Latin America	**n/a**	**8%**	**n/a**	**14,000**
Mexico	6	3	8,000	4,000
Other International	**14%**	**4%**	**22,000**	**6,000**
Israel	n/a	2	n/a	3,000
TOTAL INTERNATIONAL	**100%**	**100%**	**154,000**	**167,000**

- The Latin American market, which was not measured separately in 2011, represented 8 percent (14,000) of international visitors.
- The “other international” market represented 4 percent (6,000) of international visitors. While it appears to have declined since 2011, most of the decline can be attributed to adding Latin America as its own region.

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.

TABLE 19.3 - Additional International Countries with Number of Responses

Countries with more than one response		Countries with one response each
Spain (14)	Colombia (2)	American Samoa
Belgium (12)	Dubai (2)	Bermuda
France (11)	Indonesia (2)	Dominican Republic
Ireland (9)	Estonia (2)	Greenland
Denmark (9)	Finland (2)	Grenada
Norway (9)	Portugal (2)	Guam
Argentina (8)	Indonesia (2)	Guatemala
Czech Republic (6)		Honduras
South Africa (5)		Macedonia
Brazil (4)		Malta
Sweden (4)		Nicaragua
Russia (3)		Poland
Puerto Rico (3)		Romania
Philippines (3)		Taiwan
Croatia (3)		Virgin Islands

Trip Purpose

- Over nine out of ten international visitors (93 percent) were traveling for vacation/pleasure, significantly above the overall visitor rate of 79 percent. VFR rates were significantly lower at 4 percent (compared to 13 percent of all visitors), while only 2 percent of international visitors were traveling for business or business/pleasure, compared to 8 percent of all visitors.
- Vacation/pleasure rates for international markets ranged from 85 percent among Germans to 98 percent among those from Australia/New Zealand. Germans were the most likely international market to be VFRs (10 percent), while Japanese travelers were the most likely to be traveling for business (6 percent).
- International visitors' trip purpose was fairly consistent between 2011 and 2016: vacation/pleasure was 92 percent in 2011 and 93 percent in 2016; VFR was 3 and 4 percent, respectively; and business (combined) was 5 and 2 percent.

TABLE 19.4 - Trip Purpose
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Vacation/pleasure	79	93	86	94	98
Visiting friends/rel.	13	4	6	-	2
Business only	5	1	4	6	-
Business/pleasure	3	1	4	-	-
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Vacation/pleasure	92	88	85	95	87
Visiting friends/rel.	5	8	10	3	6
Business only	2	1	1	2	3
Business/pleasure	1	2	3	-	4

Packages

- Three-quarters of international visitors (75 percent) purchased a multi-day package as part of their Alaska trip, compared to the overall visitor rate of 64 percent. Australia/New Zealand visitors were the most likely to be package travelers (94 percent), while Germans were the least likely (40 percent).
- Non-cruise international visitors who purchased a package were fairly evenly distributed in terms of package type, ranging from 12 percent for motorcoach tour to 19 percent for adventure tour. They differed from the overall market, which was much more focused on fishing lodge packages. Sample sizes for individual markets were too small for analysis.
- The rate of package purchase decreased slightly between 2011 and 2016, from 78 percent of international visitors to 75 percent.
- Among international visitors who participated in a cruise, over half (56 percent) were on round-trip itineraries, lower than the overall market rate of 66 percent.

TABLE 19.5 - Packages
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Purchased multi-day package (including cruise)					
Yes	64	75	63	65	94
Package type (Base: non-cruise, purchased package)					
Fishing lodge package	49	13	-	*	*
Rail package	11	16	39	*	*
Wilderness lodge	10	14	24	*	*
Adventure tour	9	19	10	*	*
Motorcoach tour	8	12	25	*	*
Rental car/RV package	6	14	-	*	*
Hunting	2	-	-	*	*
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Purchased multi-day package (including cruise)					
Yes	78	41	40	43	48

Note: Sample size for all markets not shown were insufficient for analysis.

TABLE 19.6 – Cruise Type
International Visitors (%)

	All Visitors	International	Aust./NZ
Round trip	66	56	48
Cross-gulf	31	38	43
Cruise one-way, fly one-way	13	17	13
Cruise with land tour	18	21	30
In-state/small ship cruise	1	2	3
Other	1	3	6

Note: Sample size for all markets not shown were insufficient for analysis.

Transportation Modes

- Two-thirds of international visitors (68 percent) were cruise passengers; 28 percent were air visitors; and 4 percent were highway/ferry visitors. International visitors show a higher rate of cruise participation compared to the overall market (68 versus 55 percent), and a lower air visitor rate (28 versus 40 percent).
- Cruise passenger rates varied widely among individual markets, ranging from 25 percent of Swiss visitors to 92 percent of Australia/New Zealand visitors.
- International visitors relied most heavily on tour buses/vans to travel around Alaska (26 percent), followed by the Alaska Railroad at 21 percent. Both these rates are higher than the overall market (15 and 14 percent, respectively). International visitors are less likely than the overall market to use a personal vehicle (3 versus 9 percent).
- International visitors' transportation markets changed little between 2011 and 2016. The cruise market decreased slightly from 71 to 68 percent; the air market increased from 24 to 28 percent; and the highway/ferry market decreased from 6 to 4 percent.

TABLE 19.7 - Transportation Modes
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Transportation Market					
Cruise	55	68	48	27	92
Air	40	28	50	67	6
Highway/ferry	5	4	2	6	2
Used to Travel Between Communities					
Tour bus or van	15	26	29	56	37
Rental vehicle	14	1	21	8	2
Alaska Railroad	14	21	20	49	32
Air	9	8	11	15	5
Personal vehicle	9	3	1	-	2
Rental RV	2	4	2	-	<1
State ferry	2	3	-	-	1
Personal RV	1	1	<1	-	2
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Transportation Market					
Cruise	67	32	33	25	34
Air	31	52	53	47	57
Highway/ferry	2	16	14	28	10
Used to Travel Between Communities					
Tour bus or van	19	16	16	12	8
Rental vehicle	16	28	26	31	36
Alaska Railroad	18	12	13	11	10
Air	10	11	10	17	16
Personal vehicle	5	7	8	5	6
Rental RV	3	16	15	29	11
State ferry	4	10	10	15	8
Personal RV	1	1	2	2	<1

Length of Stay

- International visitors stayed an average of 10.4 nights in summer 2016, slightly longer than the average among all visitors (9.2 nights).
- Average length of stay was longest among Swiss visitors (15.6 nights) and shortest among Japanese visitors (5.6 nights).
- International visitors' average length of stay increased only slightly between 2011 and 2016: from 10.2 nights to 10.4 nights.

TABLE 19.8 – Average Length of Stay
International Visitors

	All Visitors	International	Asia	Japan	Aust./NZ
Average length of stay in Alaska	9.2	10.4	9.8	5.6	9.5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average length of stay in Alaska	9.3	13.0	12.6	15.6	15.5

Lodging Type

- International visitors were most likely to use a cruise ship as lodging (66 percent), followed by hotel/motel (42 percent), and lodge (20 percent).
- Compared to the overall market, this market is more likely to stay on a cruise ship (66 versus 57 percent), slightly more likely to use hotels/motels (42 versus 37 percent), and slightly more likely to use lodges (20 versus 15 percent). Unsurprisingly, they are less likely to stay with friends/family (6 versus 15 percent).
- Lodging type varied widely by market. Japanese visitors were much more likely to use hotels/motels at 72 percent. Australia/New Zealand visitors were the most likely to use lodges at 29 percent. Swiss visitors were much more likely to use campgrounds/RVs at 48 percent. (Variation in cruise ship usage was discussed in the previous section.)
- Compared to 2011, international visitors in 2016 were more likely to use hotels/motels (from 35 to 42 percent); and more likely to use lodges (from 13 to 20 percent). Other usage rates were consistent.

TABLE 19.9 - Lodging Type
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Cruise ship	57	66	47	27	90
Hotel/motel	37	42	38	72	41
Lodge	15	20	15	16	29
B&B	4	7	8	3	3
Vacation rental	3	2	2	1	1
Friends/family	15	6	6	-	2
Campground/RV	6	9	6	-	3
Wilderness camping	2	4	3	-	1
State ferry	1	1	-	-	<1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Cruise ship	66	31	32	25	34
Hotel/motel	44	46	45	51	56
Lodge	15	15	15	18	18
B&B	5	15	15	8	19
Vacation rental	2	4	5	2	8
Friends/family	5	13	14	6	14
Campground/RV	6	33	31	48	21
Wilderness camping	4	10	9	8	15
State ferry	<1	3	4	1	3

Destinations

- International visitors were most likely to visit the Southeast region (75 percent), followed by Southcentral (57 percent), Interior (40 percent), Southwest (4 percent), and Far North (2 percent).
- Compared to the overall market, international visitors were more likely to visit Southeast (75 versus 67 percent), Southcentral (57 versus 52 percent), and the Interior (40 versus 29 percent). Visitation rates to Southwest and Far North were consistent with the overall market.
- Visitation rates to cruise ports were higher among international visitors, consistent with the market's larger proportion of cruise passengers. Additional destinations showing higher rates of visitation by international travelers included:
    - Anchorage (53 percent, versus 47 percent of overall market)
    - Seward (29 versus 23 percent)
    - Valdez (9 versus 4 percent)
    - Denali (36 versus 23 percent)
    - Fairbanks (30 versus 17 percent)
- Destinations varied widely by market, largely influenced by cruise and land tour behavior, as well as the GSE market's tendency towards travel by rental vehicle/RV.
    - For instance, Southeast was visited by 93 percent of the (heavily cruise-oriented) Australia/New Zealand market, but only 27 percent of the Japanese market.
    - The Interior was visited by 70 percent of the Swiss market, but only 36 percent of the UK market.
- Between 2011 and 2016, visitation by international travelers to Southeast dropped from 81 to 75 percent, while visitation to Southcentral increased from 48 to 57 percent, and visitation to the Interior increased from 33 to 40 percent. Visitation to Southwest and the Far North did not change.

TABLE 19.10 - Destinations Visited (Day or Overnight)
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Southeast	**67**	**75**	**51**	**27**	**93**
Juneau	61	69	50	26	91
Ketchikan	58	65	47	24	88
Skagway	48	58	22	-	78
Glacier Bay Nat'l Park	29	43	19	27	68
Hoonah/Icy Strait Point	13	15	21	-	16
Sitka	9	6	7	24	4
Haines	4	4	1	-	1
Prince of Wales Island	1	<1	-	-	1
Gustavus	1	1	-	-	1
Wrangell	1	2	-	-	2
Petersburg	1	1	-	-	1
Other Southeast	1	1	-	-	1
Southcentral	**52**	**57**	**57**	**74**	**53**
Anchorage	47	53	56	74	45
Kenai Peninsula	30	32	29	18	18
Seward	23	29	26	16	16
Homer	9	8	3	-	3
Other Kenai Peninsula	7	6	5	-	3
Kenai/Soldotna	7	5	5	3	2
Talkeetna	11	12	9	11	8
Whittier	10	13	11	9	10
Palmer/Wasilla	9	9	4	2	2
Girdwood/Alyeska	8	8	10	20	2
Portage	5	5	2	1	1
Valdez	4	9	10	-	1
Prince William Sound	2	5	3	3	3
Other Mat-Su	1	2	-	-	<1
Cordova	<1	1	-	-	<1
Other Southcentral	3	6	1	-	1
Interior	**29**	**40**	**45**	**63**	**37**
Denali Nat'l Park	23	36	38	54	35
Fairbanks	17	30	35	62	31
Tok	3	4	-	-	2
Glennallen	3	5	2	-	1
Healy	2	3	<1	-	<1
Delta Junction	2	3	3	-	<1
Copper Center	1	2	-	-	<1
Chicken	1	2	-	-	1
Other Interior	2	3	1	-	1
Southwest	**4**	**4**	**2**	**1**	**3**
Kodiak	2	1	2	1	-
Other Southwest	3	3	-	-	3
Far North	**2**	**2**	**2**	**8**	**3**
Coldfoot	1	1	1	3	2
Nome	<1	<1	-	-	1
Kotzebue	<1	<1	-	-	-
Other Far North	1	1	1	6	1

TABLE 19.10 - Destinations Visited (Day or Overnight) (cont'd)
International Visitors (%)

	UK	GSE	Germany	Switzerland	Other Europe
Southeast	**73**	**58**	**59**	**56**	**54**
Juneau	67	39	39	29	41
Ketchikan	67	23	24	28	35
Skagway	62	40	43	28	35
Glacier Bay Nat'l Park	33	19	19	20	27
Hoonah/Icy Strait Point	12	3	1	14	6
Sitka	9	4	3	5	5
Haines	3	15	16	16	10
Prince of Wales Island	-	<1	-	2	<1
Gustavus	1	3	1	2	1
Wrangell	2	3	3	3	6
Petersburg	1	3	3	-	1
Other Southeast	2	1	1	2	1
Southcentral	**54**	**70**	**68**	**86**	**70**
Anchorage	53	68	64	86	66
Kenai Peninsula	40	51	47	73	50
Seward	37	46	45	57	46
Homer	8	19	15	32	25
Other Kenai Peninsula	4	15	11	28	15
Kenai/Soldotna	3	10	8	27	15
Talkeetna	9	26	28	21	23
Whittier	10	16	14	27	28
Palmer/Wasilla	12	19	18	24	23
Girdwood/Alyeska	11	11	9	14	18
Portage	8	12	11	11	8
Valdez	9	23	20	29	22
Prince William Sound	6	6	6	5	9
Other Mat-Su	3	2	1	8	8
Cordova	1	1	1	-	3
Other Southcentral	5	16	14	25	17
Interior	**37**	**56**	**54**	**70**	**54**
Denali Nat'l Park	31	49	49	61	45
Fairbanks	25	41	40	47	38
Tok	1	18	17	29	10
Glennallen	4	14	13	22	17
Healy	5	8	9	5	7
Delta Junction	2	10	10	12	11
Copper Center	<1	5	5	5	7
Chicken	<1	11	10	18	6
Other Interior	4	9	7	11	8
Southwest	**6**	**5**	**3**	**13**	**11**
Kodiak	1	1	1	3	3
Other Southwest	5	3	3	10	7
Far North	**1**	**3**	**3**	**8**	**5**
Coldfoot	<1	1	1	5	3
Nome	<1	<1	<1	-	1
Kotzebue	-	1	1	-	-
Other Far North	1	2	2	5	2

Activities

- International visitors were most likely to participating in shopping (75 percent), wildlife viewing (58 percent), cultural activities (51 percent), and day cruises (49 percent).
- Compared to the overall market, international visitors were more likely to participate in the following activities:
    - Wildlife viewing (58 percent, versus 45 percent of the overall market)
    - Cultural activities (51 versus 39 percent) including museums (31 versus 22 percent) and historical/cultural attractions (22 versus 15 percent)
    - Day cruises (49 versus 39 percent)
    - Train (42 versus 32 percent)
    - Flightseeing (22 versus 13 percent)
- International visitors were less likely to participate in fishing (7 versus 16 percent).
- Activity participation rates varied widely among different markets.
    - Wildlife viewing rates ranged from 42 percent among Asian travelers to 83 percent among Swiss visitors.
    - Swiss visitors were the least likely to participate in cultural activities (34 percent); Australia/ New Zealand visitors were the most likely (57 percent).
    - Train usage rates varied from 16 percent among Swiss visitors to 53 percent among Australia/New Zealand visitors.
    - Hiking/nature walk rates ranged from 22 percent among Australia/New Zealand visitors to 70 percent among Swiss visitors.
    - GSE, German, and Swiss visitors were much more likely to participate in camping (26 percent, 24 percent, and 37 percent, respectively).
    - The Japanese market showed high rates of participation in hot springs (29 percent) and Northern Lights viewing (24 percent).
- Overall, participation rates among international visitors did not differ markedly from 2011 rates, with the following exceptions.
    - Cultural activities fell from 57 percent in 2011 to 51 percent in 2016. The largest drop was in historical/cultural attractions, which fell from 29 to 22 percent.
    - City/sightseeing tours fell from 45 to 31 percent.
    - Day cruise participation increased from 40 to 49 percent.

TABLE 19.11 - Statewide Activities
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Shopping	75	75	78	55	75
Wildlife viewing	45	58	42	78	56
Birdwatching	9	13	1	3	11
Cultural activities	39	51	52	47	57
Museums	22	31	28	16	37
Historical/cultural attractions	15	22	13	31	29
Native cultural tours/activities	12	15	15	-	20
Gold panning/mine tour	9	11	-	-	20
Day cruises	39	49	51	45	48
Hiking/nature walk	34	35	39	42	22
Train	32	42	33	39	53
White Pass/Yukon Route	22	33	19	-	49
Alaska Railroad	14	12	14	39	8
City/sightseeing tours	31	31	46	27	31
Fishing	16	7	5	-	3
Guided fishing	10	5	5	-	3
Unguided fishing	8	2	<1	-	<1
Flightseeing	13	22	31	10	14
Tramway/gondola	13	14	17	-	20
Dog sledding/kennel tour	11	14	19	2	19
Shows/Alaska entertainment	10	10	10	-	15
Salmon bake/crab feed	10	7	3	-	12
Business	7	2	8	10	-
Kayaking/canoeing	5	7	1	3	5
Camping	5	6	1	-	<1
ATV/4-wheeling/ORV/Jeep	4	3	3	-	2
Zipline	4	3	12	-	3
Rafting	3	2	1	-	2
Biking	3	4	2	2	1
Hot springs	2	5	9	29	1
Northern Lights viewing	2	3	10	24	1
Hunting	1	<1	-	-	-
Other	1	<1	2	-	-

TABLE 19.11 - Statewide Activities (cont'd)
International Visitors (%)

	UK	GSE	Germany	Switzerland	Other Europe
Shopping	73	70	69	78	68
Wildlife viewing	65	75	74	83	56
Birdwatching	12	21	19	24	24
Cultural activities	43	39	40	34	50
Museums	24	31	32	24	37
Historical/cultural attractions	18	12	10	11	14
Native cultural tours/ activities	14	6	7	3	10
Gold panning/mine tour	6	9	9	11	4
Day cruises	54	52	51	51	48
Hiking/nature walk	29	54	50	70	60
Train	43	32	36	16	19
White Pass/Yukon Route	29	21	22	5	11
Alaska Railroad	18	15	18	11	11
City/sightseeing tours	40	22	19	20	20
Fishing	7	15	10	32	12
Guided fishing	6	7	4	10	8
Unguided fishing	3	9	7	24	5
Flightseeing	31	16	19	7	24
Tramway/gondola	14	6	5	4	7
Dog sledding/kennel tour	12	6	4	2	4
Shows/Alaska entertainment	8	3	2	9	8
Salmon bake/crab feed	2	4	5	-	5
Business	2	2	2	-	5
Kayaking/canoeing	7	18	19	9	14
Camping	4	26	24	37	19
ATV/4-wheeling/ORV/Jeep	3	3	4	2	5
Zipline	4	-	-	-	<1
Rafting	2	3	3	6	2
Biking	2	6	7	2	8
Hot springs	5	13	12	11	8
Northern Lights viewing	4	5	5	9	3
Hunting	-	1	1	-	-
Other	1	-	-	-	-

Satisfaction

- Two-thirds of international visitors (65 percent) said they were very satisfied with their overall Alaska experience, lower than the overall market (75 percent).
- Japanese visitors reported the highest "very satisfied" rate at 81 percent. The Asian market (which includes the Japanese market) were the least satisfied, at 53 percent. However, another 45 percent of Asians were "satisfied", for a total satisfaction rate of 98 percent. (While the Japanese market constituted half of the Asian market in terms of unweighted sample, they represented a much smaller portion of the market after weighting. Other Asian markets gave much lower ratings, in comparison.)
- Germans and GSE visitors gave a higher very satisfied rating (73 percent) compared to other international visitors, while Swiss and Other European visitors gave slightly lower ratings (58 and 61 percent, respectively).
- Overall satisfaction among international visitors was essentially the same in 2016 as in 2011: 65 percent were very satisfied both years, while 33 percent were satisfied in 2011, compared to 32 percent in 2016.
- When asked how their Alaska trip compared to their expectations, international visitors responded very similarly to the overall market, with 28 percent saying much higher (compared to 29 percent of the overall market), 34 percent saying higher (compared to 36 percent), and 35 percent saying about as expected (compared to 32 percent).
- Japanese visitors were the most likely to say their trip turned out much higher than their expectations at 46 percent; Other Europeans were the least likely at 12 percent.
- The percentage of international visitors giving a "much higher" rating increased slightly between 2011 and 2016, from 23 percent to 28 percent.

TABLE 19.12 - Satisfaction Ratings
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Satisfaction with overall Alaska experience					
Very satisfied	75	65	53	81	64
Satisfied	23	32	45	18	36
Compared to expectations					
Much higher	29	28	23	46	24
Higher	36	34	31	16	32
About as expected	32	35	42	36	42
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Satisfaction with overall Alaska experience					
Very satisfied	83	73	73	58	61
Satisfied	14	25	25	34	26
Compared to expectations					
Much higher	49	24	24	20	12
Higher	32	36	33	45	50
About as expected	16	36	39	33	31

Value, Recommendation, and Likelihood of Returning

- International visitors tended to rate Alaska "about the same" as other vacation destinations in terms of value for the money at 49 percent, similar to the overall market (45 percent). About one-quarter (26 percent) rated Alaska better or much better – less than the overall market (38 percent).
- Japanese visitors were much more likely than other international visitors to give a better or much better rating (64 percent). GSE, German, Swiss, and Other Europeans were the least likely to give a better or much better rating (20 percent, 19 percent, 19 percent, and 17 percent, respectively).
- The percentage of international visitors giving a better or much better rating decreased from 33 percent in 2011 to 26 percent in 2016.
- Over two-thirds of international visitors (69 percent) said they were very likely to recommend Alaska as a vacation destination, lower than the overall visitor rate of 79 percent. UK, GSE, and German visitors gave the highest "most likely" ratings at 77 percent, 76 percent, and 76 percent, respectively. Asian and Other European visitors gave the lowest ratings at 58 and 59 percent, respectively.
- The percentage of international visitors saying they were very likely to recommend Alaska fell only slightly between 2011 and 2016, from 72 to 69 percent.
- One out of five international visitors (19 percent) said they were very likely to return to Alaska in the next five years, about half as many as the overall market (40 percent).
- GSE and German visitors were the mostly likely to return at 33 and 34 percent, respectively. Australia/ New Zealand and UK visitors were the least likely at 8 and 17 percent, respectively.
- The rate of those very likely to return was similar between 2011 and 2016 at 18 and 19 percent.

TABLE 19.13 – Value for the Money and Likelihood of Recommending/Returning to Alaska International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Value for the money, compared to other destinations					
Much better	15	9	13	23	8
Better	23	17	27	41	18
About the same	45	49	49	22	62
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	79	69	58	74	67
Very likely to return to Alaska in next five years	40	19	23	29	8
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Value for the money, compared to other destinations					
Much better	10	12	11	10	7
Better	20	8	8	9	10
About the same	40	45	46	36	41
Likelihood to recommend and return to Alaska					
Very likely to recommend Alaska	77	76	76	71	59
Very likely to return to Alaska in next five years	17	33	34	23	26

Previous Alaska Travel

- One out of eight international visitors (12 percent) had been to Alaska before, a much smaller percentage than the overall market (40 percent). Swiss visitors showed the highest repeat rate at 32 percent; Japanese visitors showed the lowest at 7 percent.
- The repeat travel rate decreased slightly between 2011 and 2016, from 14 to 12 percent.
- The average number of previous Alaska trips among repeat international visitors was 3.3, lower than the overall average of 4.1. The only market with a sufficient sample size of repeaters was the GSE market, which reported an average number of 5.5 previous trips.
- The average number of previous trips among international visitors was the same in 2011 and 2016 at 3.3.
- Four percent of international visitors reported having traveled to Alaska by cruise ship previously, ranging from 3 percent among Asian, UK, and GSE visitors, to 6 percent among Other Europeans. (This question was not asked in 2011.)

TABLE 19.14 - Previous Alaska Travel
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Been to Alaska	40	12	9	7	9
Average # of vacation trips (base: repeaters)	4.1	3.3	*	*	*
Previously traveled by cruise ship	16	4	3	-	5
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Been to Alaska	15	21	21	32	19
Average # of vacation trips (base: repeaters)	*	5.5	*	*	*
Previously traveled by cruise ship	3	3	4	-	6

*Sample size insufficient for analysis.

Trip Planning Timeline

- International travelers made the decision to take their Alaska trip an average of 9.5 months ahead of time, two months longer than the average Alaska visitor (7.7 months).
- Swiss visitors had the longest advance decision period at 11.2 months, followed by Australia/New Zealand (10.9), GSE (10.5), and Germany (10.3). The Japanese and Asian markets had the shortest timelines at 4.3 and 4.8 months, respectively.
- The average trip decision period changed very little between 2011 (9.7 months) and 2016 (9.5 months).
- International visitors booked an average of 6.6 months ahead of their trip, about one month longer than the average visitor (5.4 months).
- The average advance booking timeline was shortest among Asian and Japanese travelers at 3.1 and 3.6 months, respectively. The longest timeline was among Australia/New Zealand and UK travelers at 7.6 and 8.6 months.

TABLE 19.15 - Trip Planning Timeline
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Trip Decision					
Before July 2015	14	23	2	2	28
July-Sept 2015	17	15	4	-	14
Oct-Dec 2015	17	24	17	3	32
Jan-Mar 2016	23	19	21	54	18
Apr-Jun 2016	20	13	44	22	7
July-Sept 2016	8	6	12	20	1
Avg. # of months	**7.7**	**9.5**	**4.8**	**4.3**	**10.9**
Trip Booking					
Before July 2015	6	10	-	-	16
July-Sept 2015	11	12	2	6	16
Oct-Dec 2015	15	20	9	3	17
Jan-Mar 2016	27	29	23	44	36
Apr-Jun 2016	29	20	50	27	10
July-Sept 2016	13	9	18	21	4
Avg. # of months	**5.4**	**6.6**	**3.1**	**3.6**	**7.6**
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Trip Decision					
Before July 2015	32	20	20	15	10
July-Sept 2015	25	24	28	15	16
Oct-Dec 2015	24	13	14	15	30
Jan-Mar 2016	11	28	21	41	22
Apr-Jun 2016	5	8	8	11	14
July-Sept 2016	3	7	9	3	8
Avg. # of months	**11.2**	**10.5**	**10.3**	**11.2**	**8.6**
Trip Booking					
Before July 2015	17	1	2	-	4
July-Sept 2015	23	13	11	17	5
Oct-Dec 2015	27	16	16	20	26
Jan-Mar 2016	16	33	33	34	28
Apr-Jun 2016	12	22	23	15	25
July-Sept 2016	4	14	15	13	12
Avg. # of months	**8.6**	**6.3**	**6.3**	**6.6**	**5.8**

Sources of Information

- Over half of international visitors (60 percent) used the internet to plan their Alaska trip, including 44 percent who booked online.
- Online usage rates were lower than the overall market for both planning (60 versus 68 percent) and booking (44 versus 58 percent).
- Internet usage rates ranged from 42 percent among UK visitors to 91 percent among Asian visitors.
- One-fifth of international visitors (22 percent) said they used travelalaska.com, slightly more than the overall market (18 percent). Usage rates ranged from 13 percent among Australia/New Zealand travelers to 41 and 39 percent of Other European and Japanese travelers, respectively.
- Over half of international visitors (54 percent) booked through a travel agent, much higher than the overall visitor rate of 35 percent. Travel agent usage rates ranged from 30 and 31 percent among Japanese and German travelers, respectively, to 71 percent among Australia/New Zealand travelers.
- Only 8 percent of international travelers said they had received the official State of Alaska vacation planner, lower than the overall visitor rate of 12 percent. German travelers were the most likely to have received it (14 percent); Japanese were the least likely (3 percent).
- Other than online sources and travel agents, international visitors were most likely to cite friends/family/co-workers (42 percent), brochures (25 percent), and cruise lines (22 percent) as sources of information.
- International travelers' usage of additional sources differed from the overall market in the following ways:
  - Less likely to cite friends/family/co-workers (42 versus 51 percent)
  - Less likely to cite prior experience (8 versus 23 percent)
  - More likely to cite brochures (25 versus 15 percent)
  - Less likely to cite AAA (2 versus 8 percent)
  - More likely to cite other travel guides/books (13 versus 6 percent)
  - More likely to cite tour company (9 versus 5 percent)
  - More likely to cite television (10 versus 4 percent)
- Usage rates for additional sources varied widely by market:
  - Usage of friends/family/co-workers ranged from 29 percent among Asian travelers to 51 percent among Australia/New Zealand travelers.
  - Brochure usage ranged from 13 percent among Japanese visitors to 35 percent among Australia/New Zealand visitors.
  - Cruise line usage ranged from 7 percent among German travelers to 29 percent among Asian travelers.

TABLE 19.16 – Sources of Information
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Internet, Travel Agent, Planner Usage					
Used internet	68	60	91	87	45
Booked over internet	58	44	67	73	30
Used travelalaska.com	18	22	36	39	13
Booked through travel agent	35	54	39	30	71
Received Official Planner	12	8	10	3	4
Other Sources – Top 10					
Friends/family/co-workers	51	42	29	36	51
Prior experience	23	8	4	8	6
Cruise line	22	22	29	26	24
Brochures	15	25	18	13	35
AAA	8	2	2	6	-
Other travel guide/book	6	13	12	15	8
Tour company	5	9	5	17	8
Magazine	5	6	7	7	2
Television	4	10	14	2	13
Milepost	4	5	1	3	1
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Internet, Travel Agent, Planner Usage					
Used internet	53	70	70	72	73
Booked over internet	42	60	62	48	60
Used travelalaska.com	19	29	25	27	41
Booked through travel agent	52	34	31	53	37
Received Official Planner	16	12	14	9	5
Other Sources – Top 10					
Friends/family/co-workers	28	36	32	36	33
Prior experience	8	12	10	29	12
Cruise line	19	9	7	11	9
Brochures	15	30	28	33	31
AAA	6	3	3	4	1
Other travel guide/book	14	32	34	21	19
Tour company	14	14	13	2	8
Magazine	4	13	12	17	13
Television	6	15	17	11	5
Milepost	5	18	14	30	10

Specific Websites/Apps

- International visitors' most common websites/apps for planning their Alaska trip were Google (41 percent), Trip Advisor (39 percent), airline websites (36 percent), and cruise line websites (34 percent). Their most common websites/apps for booking their trip were airline websites (37 percent), cruise line websites (22 percent), car/RV rental websites (12 percent), and tour company websites (10 percent).
- Compared to the overall market, international visitors were less likely to plan using airline websites (36 versus 50 percent) and more likely to plan using Google (41 versus 28 percent) and Trip Advisor (39 versus 23 percent). They were less likely to book using airline websites (37 versus 50 percent).

TABLE 19.17 - Top 10 Websites and Apps Used to Plan/Book International Visitors (%)

	All Visitors		International		Asia		Japan		Aust./NZ	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	50	50	36	37	40	48	16	11	33	23
Cruise line websites	35	27	34	22	16	21	30	34	56	29
Google	28	4	41	5	29	4	27	1	35	3
Trip Advisor	23	3	39	6	30	21	38	-	36	1
Expedia	14	10	16	8	9	7	4	5	21	8
Hotel/lodge/RV Park	11	10	10	6	6	5	17	3	13	5
Tour company websites	11	8	16	10	6	8	17	18	14	2
Car/RV rental websites	10	9	14	12	5	9	3	4	18	5
Travelocity	7	2	2	<1	2	-	1	-	2	1
Facebook	7	<1	8	<1	6	2	10	-	10	1
	UK		**GSE**		**Germany**		**Switzerland**		**Other Europe**	
	Plan	Book	Plan	Book	Plan	Book	Plan	Book	Plan	Book
Airline websites	27	29	35	49	35	53	34	37	61	53
Cruise line websites	23	21	21	6	21	3	30	14	24	26
Google	54	7	42	5	38	4	41	8	53	9
Trip Advisor	53	7	29	1	22	1	28	5	48	7
Expedia	15	11	15	8	15	10	-	-	19	1
Hotel/lodge/RV Park	13	8	9	7	10	8	10	7	12	14
Tour company websites	33	19	16	14	14	12	15	11	20	17
Car/RV rental websites	8	8	26	25	23	23	35	29	24	26
Travelocity	2	-	<1	-	-	-	-	-	<1	<1
Facebook	7	-	4	-	4	-	4	-	11	-

Demographics

- International visitors reported an average party size of 2.3 people, similar to the overall visitor average of 2.4 people. Average group size was higher: 5.9 people, compared with 4.2 people.
- Average party size ranged from 2.0 among Japanese travelers to 2.7 among Asian travelers. Average group size ranged from 2.6 people among Swiss travelers to 6.6 people among Asian travelers.
- The average party size of 2.3 people is down slightly from the 2011 average of 2.5 people. Average group size declined from 6.5 people to 5.9 people.
- The male/female split among international travelers was about even at 48 percent/52 percent, similar to the overall market (49/51). The balance was fairly even throughout the individual markets. The 2011 balance was likewise even (49/51).
- International travelers reported an average age of 55.3 years, two years older than the overall market (53.7 years). Average age ranged from 44.6 among Swiss travelers to 62.3 among Australia/New Zealand visitors. The average age increased by nearly five years from 2011 (from 50.7 to 55.3 years).
- One out of five international travelers (20 percent) reported children in their household, slightly lower than the overall market (23 percent). Forty-one percent were retired/semi-retired, compared with 44 percent of the overall market.
- The rate of international travelers with children in their household fell slightly between 2011 and 2016, from 25 to 20 percent, while the retirement rate stayed the same at 41 percent both years.
- Seven out of ten international visitors (71 percent) were college graduates, higher than the overall visitor rate of 63 percent. The college graduate rate was highest among Asians at 87 percent, and lowest among Swiss travelers at 62 percent. The college graduate rate increased from 59 percent in 2011 to 71 percent in 2016.
- International travelers reported an annual average income of $89,000, less than the overall visitor average of $114,000. (Incomes reported in non-U.S. currencies were adjusted to U.S. dollars.) Average incomes ranged from $77,000 among Asian visitors to $128,000 among Swiss visitors.
- Average income among international travelers fell from $107,000 in 2011 to $89,000 in 2016.

See table, next page

TABLE 19.18 - Demographics
International Visitors (%)

	All Visitors	International	Asia	Japan	Aust./NZ
Average party size	2.4	2.3	2.7	2.0	2.1
Average group size	4.2	5.9	6.6	5.4	8.6
Male/female	49/51	48/52	48/52	51/49	48/52
Average age	53.7	55.3	50.6	55.9	62.3
Children in household	23	20	39	19	12
Retired/semi-retired	44	41	20	39	52
College graduate	63	71	87	72	63
Average income	$114,000	$89,000	$77,000	$82,000	$78,000
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average party size	2.1	2.2	2.1	2.3	2.1
Average group size	5.2	2.9	3.0	2.6	3.0
Male/female	47/53	52/48	54/46	52/48	52/48
Average age	58.6	45.6	47.1	44.6	49.7
Children in household	9	15	10	26	25
Retired/semi-retired	66	18	20	21	28
College graduate	65	78	79	62	77
Average income	$102,000	$117,000	$110,000	$128,000	$97,000

Spending

- International visitors reported spending an average of $1,322 per person on their Alaska trip, excluding transportation to enter/exit the state, $300 more than the average Alaska visitor. Average spending ranged from $1,064 among Australian/New Zealand travelers to $1,827 among Other European travelers. Sample sizes for the Japanese and Swiss markets were too small for analysis.
- Average spending among international visitors increased from $1,013 in 2011 to $1,322 in 2016. Total spending increased from $156 million to $221 million.

TABLE 19.19 – Average Per-Person and Total Spending in Alaska Excluding Transportation to Enter/Exit Alaska International Visitors

	All Visitors	International	Asia	Japan	Aust./NZ
Average per-person	$1,057	$1,322	$1,442	*	$1,064
Total spending (millions)	$1,974.5	$220.8	$33.2	*	$64.9
	UK	**GSE**	**Germany**	**Switzerland**	**Other Europe**
Average per-person	$1,422	$1,768	$1,677	*	$1,827
Total spending (millions)	$39.8	$35.4	$25.2	*	$21.9

* Sample size insufficient for analysis.