

ALASKA LEGISLATURE COMMITTEE FILES 1987-1988 8672

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I. Outline of the Survey

1. Objectives

To define Japanese high potential visitors to Alaska numerically, and investigate their characteristics.

2. Procedures of the Survey

A nationally representative 20,000 prospective participants were called and a total of 13,265 responded to a telephone-screening interview. Thereafter, 715 of the total were screened from the aforementioned 13,265 (1st phase). 715 questionnaires mailed, some 494 completions were received (2nd phase).

The followings are the screening questions.

- A. In the past 3 years, have you taken any vacation trips away from home lasting at least 4 days or more?
- B. In the past 5 years, have you taken any overseas trips to places that were 3,300 km or more away from your home, that is where the one-way trip was 3,300 km or more from home?
- C. Do you currently hold a valid passport?
- D. Who in your family decides where to go on vacation?

3. Sampling Method

After selecting 300 locations by proportionate probability procedures, we sampled 20,000 respondents from telephone owners rosters (Japanese yellow pages) in all sampling locations by systematic random sampling techniques.

4. Period of the Survey

(1) Telephone-interview (screening)

27th September, 1986 - 7th October, 1986

(2) Mail-survey

12th October, 1986 - 13th November, 1986

5. The Organization of the Survey

International department, marketing division,

NIKKEI RESEARCH INC. TOKYO, JAPAN

II. Results of the Survey

1. Definitions of PROSPECTS, ACCEPTORS, and HIGH POTENTIALS

(1) Definition of PROSPECTS

A "Prospect" is one who makes or shares in the family vacation decision, has taken vacation of at least 4 days during the 3 years, and taken a vacation of at least 3,300 km one way during the past 5 years.

(2) Definition of ACCEPTORS

An "Acceptor" is the individual who indicates an interest in an Alaskan vacation (3-5 on 1-5 point interest scale).

(3) Definition of HIGH POTENTIALS

A "High Potential" is an Acceptor with a stated interest in an Alaskan vacation, have taken 2 or more long-distance (3,300 km one way) vacations in the past 5 years, and spent at least ¥250,000 per person on the longest distance trip.

Table 1 Constitution of Travelers' Types in Japan

| | <u>N</u> | <u>% of Total Population Contacted (N = 13,265)</u> | <u>N</u> | <u>% of PROSPECTS (N = 494)</u> |
|---------------------------------|----------|---|----------|-------------------------------------|
| PROSPECTS (screened samples) | 715 | 5.4% | 494 | 100.0% |
| ACCEPTORS | - | *) 2.3 | 215 | 43.5 |
| HIGH POTENTIALS | - | *) 1.0 | 95 | 19.2 |

*) These volumes were the estimated by the following method PROSPECTS' 5.4% in '% of total populaton contacted' x each volume in '% of PROSPECTS'.

2. Characteristics of PROSPECTS, ACCEPTORS, and HIGH POTENTIALS

(1) Demographic Characteristics

1) Number of Family Members (%)

Table 2

| | 1 | 2 | 3 | Equal to 4 or more 5 | | N.A. |
|-----------------|-----|------|------|-------------------------|------|------|
| PROSPECTS | 2.8 | 17.4 | 23.1 | 29.1 | 26.1 | 1.4 |
| ACCEPTORS | 2.3 | 15.3 | 21.4 | 30.2 | 29.8 | 0.9 |
| HIGH POTENTIALS | 4.2 | 16.8 | 24.2 | 24.2 | 28.4 | 2.1 |

2) Children in Family (%)

a. 12 years of age or less

Table 3

| | YES | NO | N.A. |
|-----------------|------|------|------|
| PROSPECTS | 39.9 | 51.6 | 8.5 |
| ACCEPTORS | 38.1 | 53.0 | 8.8 |
| HIGH POTENTIALS | 36.8 | 53.7 | 9.5 |

b. 13 to 17 years of age (%)

Table 4

| | YES | NO | N.A. |
|-----------------|------|------|------|
| PROSPECTS | 19.2 | 63.8 | 17.0 |
| ACCEPTORS | 25.1 | 60.9 | 14.0 |
| HIGH POTENTIALS | 20.0 | 61.1 | 18.9 |

3) Marital Status (%)

Table 5

| | NOT MARRIED | MARRIED | N.A. |
|-----------------|----------------|---------|------|
| PROSPECTS | 19.0 | 79.1 | 1.8 |
| ACCEPTORS | 17.7 | 80.9 | 1.4 |
| HIGH POTENTIALS | 11.6 | 85.3 | 3.2 |

4) Age (%)

Table 6

| | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | N.A. | MEAN |
|-----------------|-------|-------|-------|-------|-------|------|------|------|
| PROSPECTS | 9.5 | 29.6 | 20.9 | 17.6 | 10.7 | 9.9 | 1.8 | 42.6 |
| ACCEPTORS | 7.4 | 21.4 | 26.0 | 24.7 | 11.2 | 7.9 | 1.4 | 44.0 |
| HIGH POTENTIALS | 3.2 | 20.0 | 28.4 | 21.1 | 12.6 | 12.6 | 2.1 | 46.4 |

5) Educational Background (%)

Table 7

| | JUNIOR HIGH SCHOOL | HIGH SCHOOL | UNIVER- SITY | N.A. |
|-----------------|--------------------------|----------------|-----------------|------|
| PROSPECTS | 5.9 | 32.8 | 58.9 | 2.4 |
| ACCEPTORS | 7.4 | 33.0 | 56.7 | 2.8 |
| HIGH POTENTIALS | 5.3 | 29.5 | 61.1 | 4.2 |

6) Head of Household's Occupation (%)

Table 8

| | MANAGER/ ADMINIST. | CLERI- CAL | SALES | PROFES- SIONAL | SER- VICE | OTHERS | NO OCCU- PATION | N.A. |
|-----------------|-----------------------|---------------|-------|-------------------|--------------|--------|-----------------------|------|
| PROSPECTS | 28.3 | 7.7 | 10.3 | 20.0 | 7.3 | 17.0 | 7.7 | 1.6 |
| ACCEPTORS | 35.3 | 4.7 | 10.2 | 18.6 | 8.4 | 17.7 | 3.3 | 1.9 |
| HIGH POTENTIALS | 38.9 | 5.3 | 8.4 | 16.8 | 9.5 | 13.7 | 3.2 | 4.2 |

7) Family Which Has more than one Worker (%)

Table 9

| | NO | YES |
|-----------------|------|------|
| PROSPECTS | 54.0 | 46.0 |
| ACCEPTORS | 52.1 | 47.9 |
| HIGH POTENTIALS | 60.0 | 40.0 |

8) Family Income (%)

Table 10

| | Yen x 10,000 | | | | | | | | | N.A. |
|-----------------|--------------|-------------|-------------|-------------|-------------|--------------|---------------|--------------|-------|------|
| | -200 | 200- 300 | 300- 400 | 400- 500 | 500- 700 | 700- 1000 | 1000- 1500 | 1500 2000 | 2000+ | |
| PROSPECTS | 1.6 | 6.1 | 10.3 | 13.8 | 21.3 | 23.9 | 14.2 | 3.2 | 2.2 | 3.4 |
| ACCEPTORS | 2.3 | 3.7 | 8.8 | 12.1 | 21.4 | 26.0 | 15.3 | 4.7 | 2.8 | 2.8 |
| HIGH POTENTIALS | 0.0 | 4.2 | 9.5 | 14.7 | 14.7 | 26.3 | 16.8 | 6.3 | 4.2 | 3.2 |

(2) Characteristics of the Previous Traveling Experiences

1) The Frequency of at least 4 Days Vacation in 5 years

More than 70% of PROSPECTS have taken a vacation trip of at most 5 times or less. The percentage of ACCEPTORS was 64.7%, and that of HIGH POTENTIALS was 51.6%. The vacation frequency was PROSPECTS' 4.9 times, ACCEPTORS' 5.9 times, and HIGH POTENTIALS' 7.8 times. Thus, the half of PROSPECTS have taken at least 4 days vacation annually.

Table 11

| | times in 5 years | | | | | | | MEAN |
|--------------------------------|------------------|-------|-------|------|-------|-------|-----------|---------------------|
| | 1 | 2 | 3 | 4 | 5 | 1-5 | 6 or more | |
| PROSPECTS (N = 494) | 16.8% | 21.1% | 11.9% | 9.3% | 14.4% | 73.5% | 26.5% | 4.9 times/ 5 YRS |
| ACCEPTORS (N = 215) | 12.6 | 16.7 | 11.6 | 11.2 | 12.6 | 64.7 | 35.3 | 5.9 |
| HIGH POTENTIALS (N = 95) | 0.0 | 14.7 | 9.5 | 11.6 | 15.8 | 51.6 | 48.4 | 7.8 |

2) Frequency of at Least 3,300 km Distance Overseas Vacation Trip during the Past 5 Years.

60.3% of PROSPECTS had taken such a vacation only once, while, the percent of ACCEPTORS was 54.4.

The actual frequency was PROSPECT' 1.9 times, ACCEPTORS' 2.0 times, and HIGH POTENTIALS' 3.1 times.

Table 12 .

| | times in 5 years | | Mean | |
|-----------------------------|------------------|-----------|------|---------------|
| | 1 | 2 or more | | |
| PROSPECTS (N = 494) | 60.3% | 39.7% | 1.9 | times/5 years |
| ACCEPTORS (N = 215) | 54.4 | 45.6 | 2.0 | |
| HIGH POTENTIALS (N = 95) | 0.0 | 100.0 | 3.1 | |

3) Destinations of Overseas Vacation during the Past 5 Years

Table 13 shows the ranking of the visited locations.

North America's (U.S.A. and Canada) accounted for 33.8% of PROSPECTS followed by Hawaii's 34%.

Table 14 shows the visited states in U.S.A., California is the Highest rank and New York ranked second.

Table 13

Unit: % (MA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|---|------------------------|------------------------|--------------------------------|
| Hawaii | 34.0% | 34.0% | 41.1% |
| Europe | 28.3 | 32.6 | 36.8 |
| Asia or India | 28.3 | 31.6 | 41.1 |
| U.S.A. | 26.1 | 29.3 | 36.8 |
| South Pacific, Philippines, Indonesia | 22.5 | 20.0 | 31.6 |
| Canada | 7.7 | 6.5 | 11.6 |
| Australasia | 6.9 | 7.4 | 12.6 |
| Middle East | 3.0 | 3.7 | 6.3 |
| Mexico | 2.4 | 2.8 | 5.3 |
| Africa | 2.0 | 1.4 | 3.2 |
| South or Central America | 1.4 | 1.4 | 3.2 |
| Caribbean | 0.4 | 0.9 | 2.1 |

Table 14

Base = People who have taken vacation in U.S.A.

Unit: % (MA)

| | PROSPECTS (N = 147) | ACCEPTORS (N = 74) | HIGH POTENTIALS (N = 38) |
|----------------|------------------------|-----------------------|--------------------------------|
| California | 10.9% | 9.5% | 15.8% |
| New York | 4.1 | 5.4 | 7.9 |
| Illinois | 1.4 | 1.4 | 2.6 |
| Texas | 1.4 | 0.0 | 0.0 |
| Washington | 1.4 | 0.0 | 0.0 |
| <u>Alaska</u> | 0.7 | 1.4 | 2.6 |
| Arizona | 0.7 | 0.0 | 0.0 |
| Colorado | 0.7 | 0.0 | 0.0 |
| Florida | 0.7 | 0.0 | 0.0 |
| Georgia | 0.7 | 0 0 | 0.0 |
| Louisiana | 0.7 | 1.4 | 2.6 |
| Massachusetts | 0.7 | 1.4 | 2.6 |
| New Jersey | 0.7 | 0.0 | 0.0 |
| New Mexico | 0.7 | 0.0 | 0.0 |
| North Carolina | 0.7 | 0.0 | 0.0 |
| Pennsylvania | 0.7 | 1.4 | 2.6 |
| Wyoming | 0.7 | 1.4 | 2.6 |

4) The Furthest Destinations of Overseas Vacation Trips

Table 15 indicates the ranking of the furthest destinations which the respondents had visited.

Europe is the first rank, Hawaii ranked second, and the third was U.S.A. More than 30% of PROSPECTS had been to Europe.

Table 15

Unit: % (SA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|---|------------------------|------------------------|--------------------------------|
| Europe | 30.8% | 36.3% | 41.1% |
| Hawaii | 19.0 | 16.3 | 13.7 |
| U.S.A. | 15.8 | 19.1 | 18.9 |
| South Pacific, Philippines, Indonesia | 11.3 | 7.4 | 7.4 |
| Asia or India | 8.5 | 8.8 | 6.3 |
| Australasia | 3.2 | 2.8 | 3.2 |
| Canada | 3.0 | 2.3 | 3.2 |
| Africa | 2.2 | 2.3 | 3.2 |
| South or Central America | 0.8 | 0.9 | 2.1 |
| Mexico | 0.8 | 0.5 | 0.0 |
| Middle East | 0.6 | 0.5 | 1.1 |
| Caribbean | 0.0 | 0.0 | 0.0 |
| Others | 1.0 | 1.4 | 0.0 |
| N.A. | 2.8 | 1.4 | 0.0 |

Table 16 indicates the ranking of states for the PROSPECTS who stated U.S.A. as the furthest destination of previous vacation trips.

Table 16

Unit: %

| | PROSPECTS (N = 78) | ACCEPTORS (N = 41) | HIGH POTENTIALS (N = 18) |
|----------------|-----------------------|-----------------------|--------------------------------|
| California | 50.0 | 53.7% | 55.6 |
| New York | 12.8 | 9.8 | 0.0 |
| Arizona | 2.6 | 0.0 | 0.0 |
| Georgia | 2.6 | 2.4 | 5.6 |
| <u>Alaska</u> | 1.3 | 2.4 | 5.6 |
| Colorado | 1.3 | 2.4 | 5.6 |
| Maine | 1.3 | 0.0 | 0.0 |
| Maryland | 1.3 | 0.0 | 0.0 |
| Massachusetts | 1.3 | 0.0 | 0.0 |
| Nebraska | 1.3 | 2.4 | 0.0 |
| Rhode Island | 1.3 | 2.4 | 5.6 |
| South Carolina | 1.3 | 0.0 | 0.0 |
| Virginia | 1.3 | 0.0 | 0.0 |
| Washington | 1.3 | 0.0 | 0.0 |

5) The Total Expenditure for the Furthest Vacation Trip

78% of PROSPECTS spent a maximum ¥800,000 per person for their furthest vacation trip.

The mean expenditure was ¥640,000 per person.

Table 17 The Expenditure per Person for the Furthest Vacation Trip

| | Expenditure per person (¥ x 10,000) | | | | | | | | MEAN (¥ x 10,000) |
|-----------------------------|-------------------------------------|-------|-------|-------|------------|-------------|-------------|------|-------------------------|
| | 1-20 | 21-40 | 41-60 | 61-80 | 81- 100 | 101- 150 | 151- 200 | 201+ | |
| PROSPECTS (N = 494) | 6.3% | 26.1% | 30.6% | 15.0% | 12.3% | 3.8% | 1.4% | 1.6% | 64.0 |
| ACCEPTORS (N = 215) | 5.1 | 24.7 | 28.8 | 17.7 | 15.3 | 3.3 | 1.9 | 0.9 | 64.8 |
| HIGH POTENTIALS (N = 95) | 0.0 | 26.3 | 35.8 | 16.8 | 14.7 | 3.2 | 1.1 | 2.1 | 67.0 |

(3) Interests in Vacation Activities

Table 18 indicates the mean scores of the interest-scale for the vacational activities which are more than 3 points in each scale. The traditional sightseeing-related activities such as visiting national parks ..., sightseeing in cities, and visiting museums, and shopping were very popular with PROSPECTS.

Table 18 The Mean Scores of Interests in Vacational Activities Which were rated more than 3 Points (5 Point rating scale, 1 is the least, 5 is the most)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|---|------------------------|------------------------|--------------------------------|
| Visiting national parks and scenic wonders | 4.18 | 4.40 | 4.35 |
| Sightseeing in cities | 3.97 | 4.06 | 4.05 |
| Shopping | 3.81 | 3.80 | 3.81 |
| Visiting museums | 3.67 | 3.91 | 3.92 |
| Dining out in fine restaurants | 3.65 | 3.65 | 3.64 |
| Enjoying nighttime entertainment | 3.49 | 3.53 | 3.45 |
| Learning about different cultures | 3.33 | 3.63 | 3.66 |
| Seeing wildlife in its natural habitat | 3.29 | 3.75 | 3.54 |
| Swimming and sunbathing | 3.18 | 3.18 | 3.16 |
| Visiting friends and relatives | 3.08 | 3.11 | 3.11 |
| Having things for children to do and be interested in | 3.04 | 3.09 | 3.09 |
| Taking trips that offer adventure and challenge | 3.01 | 3.26 | 3.11 |

3. Images of Alaska

(1) The Associated Images of Alaska

Table 19 indicates the results of the first free associations of Alaska which were higher than 1%.

Alaska was associated with 'climate' and 'surroundings' by more than 50% of PROSPECTS.

Table 19

(SA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|--|------------------------|------------------------|--------------------------------|
| Cold/Freezing | 26.3% | 19.1% | 14.7% |
| Snow/Ice/Icicle | 14.6 | 11.6 | 11.6 |
| General comments on nature | 12.8 | 21.4 | 24.2 |
| Eskimos/Indians/ Nature Alaskans | 10.3 | 10.2 | 8.4 |
| Glaciers/Icebergs | 7.5 | 8.4 | 10.5 |
| Wildlife/Animals | 6.5 | 4.7 | 3.2 |
| Anchorage/Juneau/ Other cities | 3.4 | 2.3 | 3.2 |
| Others on Sights | 3.0 | 3.7 | 5.3 |
| Mt. McKinley/Denali/ National parks | 1.6 | 3.3 | 3.2 |
| Vast/Open space | 1.4 | 2.3 | 3.2 |

Table 20 The Second Free Associations of Alaska

(SA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|--|------------------------|------------------------|--------------------------------|
| Wildlife?Animals | 12.3% | 13.0% | 16.8% |
| Cold/Freezing | 11.5 | 8.4 | 5.3 |
| Eskimos/Indians/ Nature Alaskans | 10.9 | 6.5 | 6.3 |
| General comments on nature | 9.5 | 14.4 | 12.6 |
| Snow/Ice/Icicles | 7.5 | 6.0 | 8.4 |
| Others on sights | 5.7 | 8.8 | 10.5 |
| Glaciers/Icebergs | 5.1 | 7.0 | 8.4 |
| Winter sports | 2.0 | 2.8 | 3.2 |
| Far away | 2.0 | 1.4 | 0.0 |
| Anchorage/Juneau/ Other cities | 1.8 | 0.5 | 0.0 |
| Mt. McKinley/Denali/ National parks | 1.6 | 1.9 | 1.1 |
| Hunting/Fishing | 1.6 | 1.9 | 2.1 |
| Pipeline/Oil | 1.4 | 1.9 | 0.0 |

(2) The Images of Types of Japanese Travelers to Alaska

Table 21 indicates the types of people who would be most likely to take an Alaskan vacation.

Alaska appealed the nature-oriented types such as 'Adventurers', 'People who like scenic wonders', and 'People who like winter sports'.

Table 21

UNIT: % (MA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|--|------------------------|------------------------|--------------------------------|
| People who like scenic wonders | 66.4% | 75.8% | 76.8% |
| Adventurers | 49.2 | 42.3 | 45.3 |
| People who like winter sports | 29.8 | 34.9 | 38.9 |
| People who like fishing | 29.8 | 40.5 | 36.8 |
| Climbers | 18.8 | 20.5 | 22.1 |
| People who like animals | 13.6 | 18.1 | 20.0 |
| People who have the interest in different cultures | 13.4 | 17.7 | 22.1 |
| People who like outdoor sports | 11.9 | 17.7 | 12.6 |
| People who like outdoor life | 11.3 | 13.0 | 12.6 |
| Professional travellers | 11.1 | 10.2 | 12.6 |
| People who enjoy gorgeous hotel-life | 2.0 | 3.7 | 1.1 |
| People who like shopping | 1.0 | 0.9 | 1.1 |
| Others | 1.4 | 1.4 | 1.1 |

(3) The Vacation-related Attributes of Alaska

PROSPECTS indicated that 'Hotels & Motels' and 'Food & restaurants' would have no more than 'fair' conditions.

Table 22 The Mean Scores of the Expectations towards the
Alaskan Vacation-related Attributes
(4 Point rating scale - 1: poor, 2: fair, 3: good, 4: excellent)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|---|------------------------|------------------------|--------------------------------|
| Hotels and motels | 2.13 | 2.29 | 2.33 |
| Food and restaurants | 2.15 | 2.39 | 2.41 |
| Ease of getting around | 1.60 | 1.72 | 1.75 |
| Climate | 1.40 | 1.58 | 1.55 |
| Recreational facilities for tourists | 1.86 | 2.09 | 2.04 |

4. The Interest in Alaska

(1) The Intention to Travel to Alaska

43.5% of PROSPECTS had at least some intention to travel to Alaska.

Table 23 The Interest in Traveling to Alaska
(5 Point rating scale - 1: Not at all interested, 5: Very interested)

| | Interest scale point | | | | | N.A. | MEAN |
|-----------------------------|----------------------|-------|-------|-------|-------|------|------|
| | 5 | 4 | 3 | 2 | 1 | | |
| PROSPECTS (N = 494) | 8.1% | 17.0% | 18.4% | 30.6% | 24.5% | 1.4% | 2.53 |
| ACCEPTORS (N = 215) | 18.6 | 39.1 | 42.3 | 0.0 | 0.0 | 0.0 | 3.76 |
| HIGH POTENTIALS (N = 95) | 20.0 | 36.8 | 43.2 | 0.0 | 0.0 | 0.0 | 3.77 |

(2) Reasons Why People Would Like to Travel to Alaska

The interest in scenic wonders was the main reason why ACCEPTORS would like to travel to Alaska. On the other hand, coldness is the main reason why NON-ACCEPTORS would not like to travel to Alaska.

PROSPECTS who had never been to Alaska gave as much the same reasons for not going as NON-ACCEPTORS.

Table 24 Reasons for the Interest in an Alaskan Vacation
Base = PROSPECTS who have at least some interest in an Alaskan Vacation

| | ACCEPTORS N = 215 | HIGH POTENTIALS N = 95 |
|-----------------------------------|----------------------|---------------------------|
| National parks/ scenic wonders | 29.8% | 31.6% |
| Different culture | 10.2 | 9.5 |
| Fishing | 7.4 | 5.3 |
| Winter sports | 5.6 | 5.3 |
| Outdoor life | 2.8 | 4.2 |
| Shopping | 1.9 | 3.2 |
| Good restaurants | 0.5 | 0.0 |
| Tennis/Golf | 0.0 | 0.0 |
| Swimming/Sunbathing | 0.0 | 0.0 |
| Others | 42.3 | 47.4 |
| N.A. | 9.8 | 6.3 |

Table 25 The Reason of the Non-interest in an Alaskan Vacation

Base: PROSPECTS who have little or no interest in an Alaskan vacation

| | PROSPECTS (N = 272) |
|-------------------------------------|------------------------|
| Coldness | 38.6% |
| Would like to go to other places | 21.3 |
| No interest in Alaska | 14.0 |
| Unfamiliar | 4.0 |
| Faraway from Japan | 3.3 |
| Expensive to travel | 2.2 |
| No time | 2.2 |
| No popular resort | 1.5 |
| Positive answer | 0.4 |
| Others | 19.5 |
| N.A. | 7.0 |

Table 26 Reasons why respondents have never been to Alaska

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|-------------------------------------|------------------------|------------------------|--------------------------------|
| Coldness | 39.7% | 29.8% | 31.6% |
| Would like to go to other places | 29.1 | 24.7 | 30.5 |
| No interest in Alaska | 26.9 | 3.7 | 5.3 |
| No time | 22.5 | 38.6 | 28.4 |
| Unfamiliar | 20.6 | 16.3 | 18.9 |
| Expensive to travel | 17.6 | 28.4 | 17.9 |
| Faraway from Japan | 16.4 | 20.0 | 15.8 |
| No popular resort | 0.6 | 0.5 | 1.1 |
| Others | 3.4 | 6.0 | 6.3 |
| N.A. | 2.4 | 3.3 | 5.3 |

(3) The Favorable Season for Visiting Alaska

Most PROSPECTS would favor a summer vacation if they decided to travel to Alaska.

Table 27

UNIT: %

| | N | Months | | | | | | | | | | | | N.A. |
|--------------------|-----|--------|-----|-----|-----|-----|------|------|------|-----|-----|-----|-----|------|
| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | |
| PROSPECTS | 494 | 3.2 | 2.6 | 2.6 | 3.0 | 5.7 | 8.1 | 23.1 | 47.2 | 3.6 | 1.8 | 0.4 | 2.4 | 5.5 |
| ACCEPTORS | 215 | 4.2 | 2.8 | 4.2 | 3.7 | 6.5 | 10.2 | 25.6 | 44.7 | 5.1 | 2.3 | 0.0 | 4.2 | 1.9 |
| HIGH POTENTIALS | 95 | 4.2 | 2.1 | 2.1 | 5.3 | 5.3 | 11. | 27.4 | 40.0 | 5.3 | 3.2 | 0.0 | 4.2 | 3.2 |

5. Evaluation of an Alaskan Vacation

The great nature-oriented activities, such as 'visit national parks and scenic wonders', 'go winter sports', 'see wildlife in its natural habitat', and 'take trips that offer adventure and challenge' were very highly evaluated.

Table 28 The Mean Scores of Expectation of an Alaskan Vacation
 (5 Point rating scale, 1: Very poor, 5: Excellent)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|--|------------------------|------------------------|--------------------------------|
| Visiting national parks and scenic wonders | 4.32 | 4.57 | 4.56 |
| Going winter skiing and play other winter sports | 4.11 | 4.18 | 4.18 |
| Seeing wildlife in its natural habitat | 4.11 | 4.31 | 4.32 |
| Taking trips that offer adventure and and challenge | 4.05 | 4.05 | 4.01 |
| Fishing | 3.95 | 4.06 | 4.15 |
| Learning about different cultures | 3.41 | 3.54 | 3.67 |
| Camping, hiking, back- packing, and having good facilities for outdoor activities | 3.19 | 3.55 | 3.55 |
| Having a things for children to do and be interested in | 3.07 | 3.26 | 3.19 |
| Sightseeing in cities | 3.00 | 3.23 | 3.22 |
| Shopping | 2.99 | 3.15 | 3.13 |
| Dining-out in fine restaurants | 2.91 | 3.09 | 3.09 |
| Visiting museums | 2.54 | 2.68 | 2.64 |
| Enjoying nighttime entertainment | 2.45 | 2.60 | 2.55 |
| Playing tennis and golf | 2.23 | 2.46 | 2.47 |
| Visiting friends and relatives | 2.05 | 2.13 | 2.14 |
| Swimming and sunbathing | 2.01 | 2.22 | 2.29 |

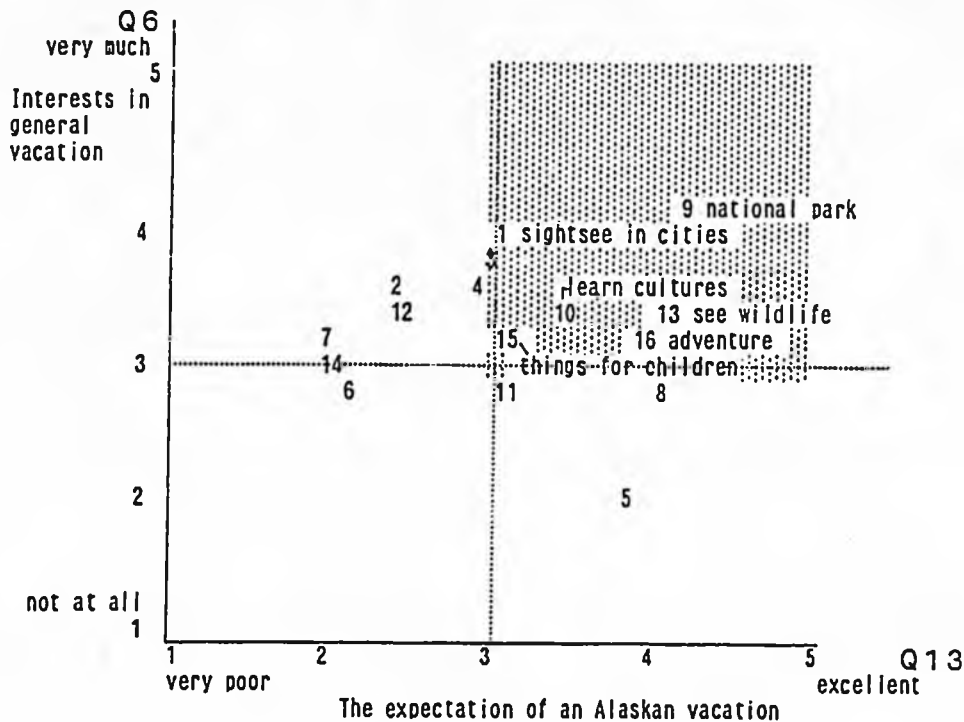
III. Implications and Considerations

1. Benefits of an Alaskan Vacation and Preferred Vacation Pastimes

The vertical score indicates the level of interest in a general vacation, and the horizontal axis indicates the expectation of an Alaskan vacation.

In order to ascertain the most effective activities for the sale & promotion of Alaska, attention should be paid to the areas covered by dots.

Fig. 1 Interest in a General Vacation and Expectations of an Alaskan Vacation



- 1 To sightsee in cities
- 2 To visit museums
- 3 Shopping
- 4 To dine out in fine restaurants
- 5 Fishing
- 6 To play tennis and golf
- 7 To swim and sunbathe
- 8 To go winter skiing and play other winter sports
- 9 To visit national parks and scenic wonders
- 10 To learn about different cultures
- 11 To camp, hike, backpack and have good facilities for outdoor activities
- 12 To enjoy nighttime entertainment
- 13 To see wildlife and relatives
- 14 To visit friends and relatives
- 15 To have things for children to do and be interested in
- 16 To take trips that offer adventure and challenge

The following are the prospective activities for sale & promotion of an Alaskan Vacation.

to visit national parks and scenic wonders

to see wildlife in its natural habitat

to sightsee in cities

to learn about different cultures

to take trips that offer adventure and challenges

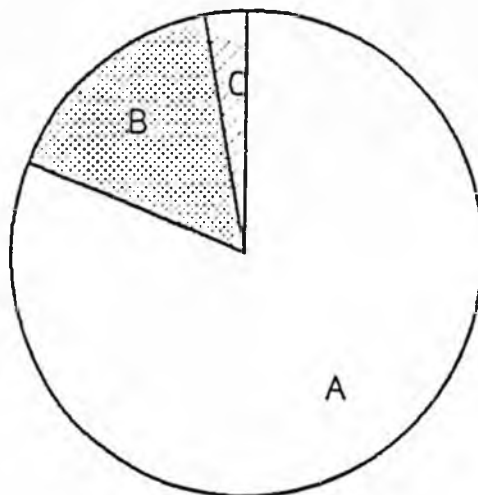
to have things for children to do and to be interested in

2. The Market Characteristics of Prospective Japanese Travelers

(1) The Percentage Rates of Japanese Overseas Travelers by Purpose

Fig. 2 indicates the percentage rates of 1985's Japanese overseas travelers by the purposes of trip. The 81.3% of all Japanese Overseas Travelers who nominated sightseeing as their main vacation determinant may be categorized as Prospects.

fig.2 Percentage of Japanese overseas travelers by purposes
(source:1985'data of THE MINISTRY OF JUSTICE)



| | unit : % | |
|---------------|----------|-------|
| A sightseeing | 81.3 | 81.3% |
| B business | 15.5 | 15.5% |
| C others | 3.2 | 3.2% |

(2) Distribution of Travelers by Age

Table 29 shows the distribution of 1985's Japanese travelers by age and that of PROSPECTS.

Both approximate each other although the youngest category (18-24 age) of PROSPECTS is somewhat less than the corresponding percentage of the total population, as it is the PROSPECTS are the family vacation decision makers.

Table 29

| | *All Japanese travelers | PROSPECTS |
|---------|----------------------------|-----------|
| 18 - 24 | 15.1% | 9.5% |
| 25 - 34 | 26.5 | 29.6 |
| 25 - 44 | 22.1 | 20.9 |
| 45 - 54 | 17.7 | 17.6 |
| 55 - 64 | 13.2 | 10.7 |
| 65+ | 5.5 | 9.9 |

* The source of these data is THE MINISTRY OF JUSTICE, but we adjusted them in order to match the categories of the survey instrument.

(3) The Constitution of the Total Japanese Outbound Travel Market by Destinations

Table 30 indicates the constitution of the total Japanese outbound travel market segmented by destinations of 3,300 km distance or more, and others.

The percentage of trips equal to or more than 3,300 km is approximately 70%, which corresponds to the definition of PROSPECTS.

Table 30
(Source: WTO & OECD's 1984's data)

| | Total Japanese travelers |
|---|-----------------------------|
| * More or equal 3,300 km distance destinations | 69.7% |
| Others | 30.3% |

* We accumulated the % of each destination which is equal to or more than 3,300 km distant from Japan.

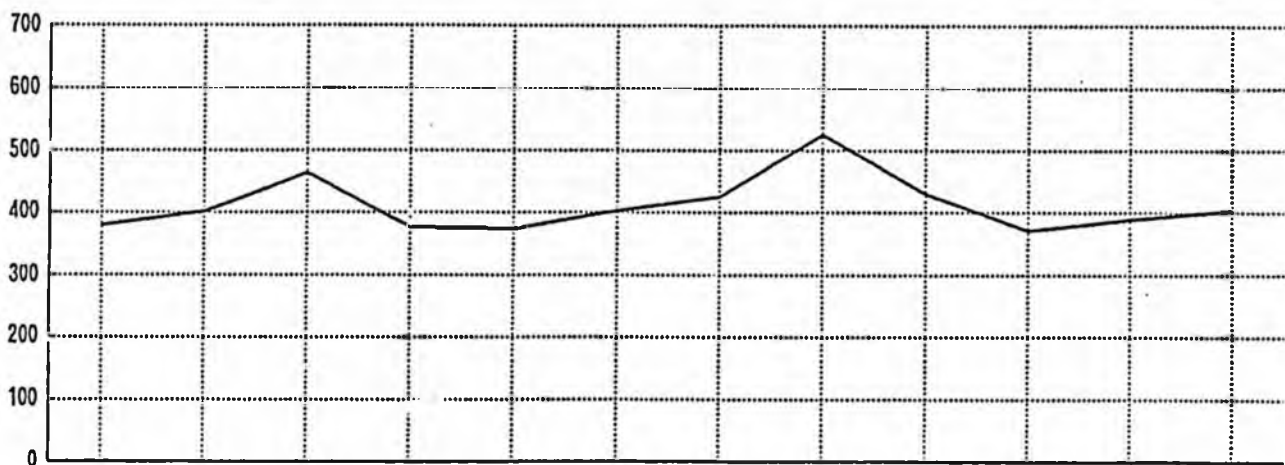
(4) The Seasonal Distribution of Japanese Overseas Travelers

Fig. 3 indicates the seasonal distributions of the Japanese overseas travelers in 1985.

Summer is the most favored season for prospective Japanese travelers to Alaska.

fig.3 Number of Japanese overseas travelers by month
(source:1985's data of THE MINISTRY OF JUSTICE)

UNIT:1,000



| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 379 | 402 | 465 | 377 | 374 | 403 | 426 | 526 | 430 | 371 | 389 | 404 |

month

THE ALASKA VISITORS ASSOCIATION
MARKETING COUNCIL

THE POTENTIAL FOR JAPANESE
TRAVEL TO ALASKA
[EXECUTIVE SUMMARY]

NOVEMBER, 1986

NIKKEI RESEARCH INC.

TOKYO, JAPAN

1. Definition and Percentages of PROSPECTS, ACCEPTORS, and HIGH POTENTIALS.

Table 1 Constitution of Travelers' Types in Japan

| | <u>N</u> | <u>% of Total Population Contacted (N = 13,265)</u> | <u>N</u> | <u>% of PROSPECTS (N = 494)</u> |
|---------------------------------|----------|---|----------|-------------------------------------|
| PROSPECTS (screened samples) | 715 | 5.4% | 494 | 100.0% |
| ACCEPTORS | - | *) 2.3 | 215 | 43.5 |
| HIGH POTENTIALS | - | *) 1.0 | 95 | 19.2 |

*) These volumes were the estimated by the following method; PROSPECTS' 5.4% in '% of total populaton contacted' x each volume in '% of PROSPECTS'.

1. Definitions of PROSPECTS, ACCEPTORS, and HIGH POTENTIALS

(1) Definition of PROSPECTS

A "Prospect" is one who makes or shares in the family vacation decision, has taken vacation of at least 4 days during the 3 years, and taken a vacation of at least 3,300 km one way during the past 5 years.

(2) Definition of ACCEPTORS

An "Acceptor" is the individual who indicates an interest in an Alaskan vacation (3-5 on 1-5 point interest scale).

(3) Definition of HIGH POTENTIALS

A "High Potential" is an Acceptor with a stated interest in an Alaskan vacation, have taken 2 or more long-distance (3,300 km one way) vacations in past 5 years, and spent at least ¥250,000 per person on the longest distance trip.

2. Characteristics of PROSPECTS, ACCEPTORS, and HIGH POTENTIALS

(1) Demographic Characteristics

1) Number of Family Members (%)

Table 2

| | 1 | 2 | 3 | Equal to 4 or more 5 | | N.A. |
|-----------------|-----|------|------|-------------------------|------|------|
| PROSPECTS | 2.8 | 17.4 | 23.1 | 29.1 | 26.1 | 1.4 |
| ACCEPTORS | 2.3 | 15.3 | 21.4 | 30.2 | 29.8 | 0.9 |
| HIGH POTENTIALS | 4.2 | 16.8 | 24.2 | 24.2 | 28.4 | 2.1 |

2) Children in Family (%)

a. 12 years of age or less

Table 3

| | YES | NO | N.A. |
|-----------------|------|------|------|
| PROSPECTS | 39.9 | 51.6 | 8.5 |
| ACCEPTORS | 38.1 | 53.0 | 8.8 |
| HIGH POTENTIALS | 36.8 | 53.7 | 9.5 |

b. 13 to 17 years of age (%)

Table 4

| | YES | NO | N.A. |
|-----------------|------|------|------|
| PROSPECTS | 19.2 | 63.8 | 17.0 |
| ACCEPTORS | 25.1 | 60.9 | 14.0 |
| HIGH POTENTIALS | 20.0 | 61.1 | 18.9 |

3) Age (%)

Table 5

| | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | N.A. | MEAN |
|-----------------|-------|-------|-------|-------|-------|------|------|------|
| PROSPECTS | 9.5 | 29.6 | 20.9 | 17.6 | 10.7 | 9.9 | 1.8 | 42.6 |
| ACCEPTORS | 7.4 | 21.4 | 26.0 | 24.7 | 11.2 | 7.9 | 1.4 | 44.0 |
| HIGH POTENTIALS | 3.2 | 20.0 | 28.4 | 21.1 | 12.6 | 12.6 | 2.1 | 46.4 |

4) Educational Background (%)

Table 6

| | JUNIOR HIGH SCHOOL | HIGH SCHOOL | UNIVER- SITY | N.A. |
|-----------------|--------------------------|----------------|-----------------|------|
| PROSPECTS | 5.9 | 32.8 | 58.9 | 2.4 |
| ACCEPTORS | 7.4 | 33.0 | 56.7 | 2.8 |
| HIGH POTENTIALS | 5.3 | 29.5 | 61.1 | 4.2 |

5) Head of Household's Occupation (%)

Table 7

| | MANAGER/ ADMINIST. | CLERI- CAL | SALES | PROFES- SIONAL | SER- VICE | OTHERS | NO OCCU- PATION | N.A. |
|-----------------|-----------------------|---------------|-------|-------------------|--------------|--------|-----------------------|------|
| PROSPECTS | 28.3 | 7.7 | 10.3 | 20.0 | 7.3 | 17.0 | 7.7 | 1.6 |
| ACCEPTORS | 35.3 | 4.7 | 10.2 | 18.6 | 8.4 | 17.7 | 3.3 | 1.9 |
| HIGH POTENTIALS | 38.9 | 5.3 | 8.4 | 16.8 | 9.5 | 13.7 | 3.2 | 4.2 |

6) Family Income (%)

Table 8

| | Yen x 10,000 | | | | | | | | | N.A. |
|-----------------|--------------|---------|---------|---------|---------|----------|-----------|-----------|-------|------|
| | -200 | 200-300 | 300-400 | 400-500 | 500-700 | 700-1000 | 1000-1500 | 1500-2000 | 2000+ | |
| PROSPECTS | 1.6 | 6.1 | 10.3 | 13.8 | 21.3 | 23.9 | 14.2 | 3.2 | 2.2 | 3.4 |
| ACCEPTORS | 2.3 | 3.7 | 8.8 | 12.1 | 21.4 | 26.0 | 15.3 | 4.7 | 2.8 | 2.8 |
| HIGH POTENTIALS | 0.0 | 4.2 | 9.5 | 14.7 | 14.7 | 26.3 | 16.8 | 6.3 | 4.2 | 3.2 |

3. The Frequency of at least 4 Days Vacation in 5 years

Table 9

| | times in 5 years | | | | | | | MEAN |
|--------------------------------|------------------|-------|-------|------|-------|-------|-----------|---------------------|
| | 1 | 2 | 3 | 4 | 5 | 1-5 | 6 or more | |
| PROSPECTS (N = 494) | 16.8% | 21.1% | 11.9% | 9.3% | 14.4% | 73.5% | 26.5% | 4.9 times/ 5 YRS |
| ACCEPTORS (N = 215) | 12.6 | 16.7 | 11.6 | 11.2 | 12.6 | 64.7 | 35.3 | 5.9 |
| HIGH POTENTIALS (N = 95) | 0.0 | 14.7 | 9.5 | 11.6 | 15.8 | 51.6 | 48.4 | 7.8 |

4. Frequency of at least 3,300 km Distance Overseas Vacation Trip during the past 5 years

Table 10

| | times in 5 years | | Mean |
|-----------------------------|------------------|-----------|-------------------|
| | 1 | 2 or more | |
| PROSPECTS (N = 494) | 60.3% | 39.7% | 1.9 times/5 years |
| ACCEPTORS (N = 215) | 54.4 | 45.6 | 2.0 |
| HIGH POTENTIALS (N = 95) | 0.0 | 100.0 | 3.1 |

5. Seven Most Popular Destinations of Overseas Vacation during the past 5 Years

Table 11

Unit: % (MA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|---|------------------------|------------------------|--------------------------------|
| Hawaii | 34.0% | 34.0% | 41.1% |
| Europe | 28.3 | 32.6 | 36.8 |
| Asia or India | 28.3 | 31.6 | 41.1 |
| U.S.A. | 26.1 | 29.3 | 36.8 |
| South Pacific, Philippines, Indonesia | 22.5 | 20.0 | 31.6 |
| Canada | 7.7 | 6.5 | 11.6 |
| Australasia | 6.9 | 7.4 | 12.6 |

Table 12 Seven Most Popular Vacation States for Japanese

Base = People who have taken vacation in U.S.A.

Unit: % (MA)

| | PROSPECTS (N = 147) | ACCEPTORS (N = 74) | HIGH POTENTIALS (N = 38) |
|---------------|------------------------|-----------------------|--------------------------------|
| California | 10.9% | 9.5% | 15.8% |
| New York | 4.1 | 5.4 | 7.9 |
| Illinois | 1.4 | 1.4 | 2.6 |
| Texas | 1.4 | 0.0 | 0.0 |
| Washington | 1.4 | 0.0 | 0.0 |
| <u>Alaska</u> | 0.7 | 1.4 | 2.6 |
| Arizona | 0.7 | 0.0 | 0.0 |

6. The Seven Most Associated Images of Alaska

Table 13

(SA)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|-------------------------------------|------------------------|------------------------|--------------------------------|
| Cold/Freezing | 26.3% | 19.1% | 14.7% |
| Snow/Ice/Icicle | 14.6 | 11.6 | 11.6 |
| General comments on nature | 12.8 | 21.4 | 24.2 |
| Eskimos/Indians/ Nature Alaskans | 10.3 | 10.2 | 8.4 |
| Glaciers/Icebergs | 7.5 | 8.4 | 10.5 |
| Wildlife/Animals | 6.5 | 4.7 | 3.2 |
| Anchorage/Juneau/ Other cities | 3.4 | 2.3 | 3.2 |

7. The Intention to Travel to Alaska

43.5% of PROSPECTS indicated some intention to do so.

Table 14 The Interest in Traveling to Alaska
(5 Point rating scale - 1: Not at all interested, 5: Very interested)

| | Five point scale | | | | | N.A. | MEAN |
|-----------------------------|------------------|-------|-------|-------|-------|------|------|
| | 5 | 4 | 3 | 2 | 1 | | |
| PROSPECTS (N = 494) | 8.1% | 17.0% | 18.4% | 30.6% | 24.5% | 1.4% | 2.53 |
| ACCEPTORS (N = 215) | 18.6 | 39.1 | 42.3 | 0.0 | 0.0 | 0.0 | 3.76 |
| HIGH POTENTIALS (N = 95) | 20.0 | 36.8 | 43.2 | 0.0 | 0.0 | 0.0 | 3.77 |

8. The mean scores for seven elements of expectations for an Alaskan Vacation

Table 15
(5 Point rating scale, 1: Very poor, 5: Excellent)

| | PROSPECTS (N = 494) | ACCEPTORS (N = 215) | HIGH POTENTIALS (N = 95) |
|--|------------------------|------------------------|--------------------------------|
| Visiting national parks and scenic wonders | 4.32 | 4.57 | 4.56 |
| Going winter skiing and play other winter sports | 4.11 | 4.18 | 4.18 |
| Seeing wildlife in its natural habitat | 4.11 | 4.31 | 4.32 |
| Taking trips that offer adventure and challenge | 4.05 | 4.05 | 4.01 |
| Fishing | 3.95 | 4.06 | 4.15 |
| Learning about different cultures | 3.41 | 3.54 | 3.67 |
| Camping, hiking, back-packing, and having good facilities for outdoor activities | 3.19 | 3.55 | 3.55 |

THE ALASKA VISITORS ASSOCIATION
MARKETING COUNCIL

THE POTENTIAL FOR JAPANESE
TRAVEL TO ALASKA
[IMPLICATIONS FOR MANAGERS]

NOVEMBER, 1986

NIKKEI RESEARCH INC.

TOKYO, JAPAN

This survey was conducted between October 12 and November 13, 1986, and reflects the market conditions pertaining at that time.

The methodology consisted of a professionally designed self-administered mail questionnaire. Strict national random probability procedures were used to ensure that each element of the population had an equal probability of selection in the sample.

Two waves of mailouts were employed to maximize the data yield and each respondent was given an incentive gift in appreciation of his/her cooperation. The reader is referred to page 2 for full particulars of the sampling procedures.

As Japan is a homogeneous country without significant ethnic or religious subgroups - and since the telephone directories which constituted the frame of reference for respondent selection cover 95 percent of the household population - the sample may be said to be representative of the Japanese population at large.

Furthermore, the two mailouts of 715 questionnaires elicited a total of 494 completions or a response rate of approximately 70 percent, thus minimizing the possibility of bias and inputting the findings with a reliable level of statistical confidence.

Basically, feedback on Alaska and its attractions was relatively low among the target market subgroups of so-called prospects, Acceptors and High Potentials. It may be hypothesized that this was attributable to lack of

cognizance of available facilities and activities. For example, shopping, dining-out and nighttime entertainment generated generally low scores.

Another aspect which seems capable of correction concerns Japanese impressions of Alaska's 'coldness' with it's concurrent implications of discomfort. However, in point of fact Alaska's summer climate is roughly comparable with that of Hokkaido - which is particularly popular with Japanese tourists during the temperate spring through autumn seasons.

As the average temperatures in Alaska from May through September are relatively mild, and since the findings of this survey indicate that Japanese prefer to take their vacations in the summer, a concerted campaign to dispel the negative connotations of Alaska's 'coldness' seems called for. The seriousness of this problem highlighted by the following percentage perceptions which are climate related:

| | |
|-------------------|-------|
| Cold/freezing | 26.3% |
| Snow/ice/icicle | 14.6% |
| Glaciers/icebergs | 7.5% |
| | <hr/> |
| Total: | 48.4% |

As a corollary of this situation, the image of Alaska as a destination to indulge in outdoor sports such as tennis, golf and swimming has been impaired to such an extent that these activities garnered zero percentage reasons for wanting to take a vacation in Alaska among Acceptors and High Potentials.

Similarly, Alaska's image as a place with good restaurants was minimal, although such dishes as Alaska Salmon, Alaska Crab, and other seafood such as

shrimp, virtually parallel similar delicacies which are much sought after from Hokkaido (and which tend to be expensive). Familiarizing potential Japanese visitors with these similarities - and their availability at reasonable prices in comfortable, clean restaurants - should be a cornerstone of any advertising campaign.

Campers, wildlife enthusiasts, skiers, and photographers form significant segments of adventurous travellers who are always seeking new experiences and are sufficiently affluent to actualize their anticipations. On a cost/benefit basis, such subgroups can generally be reached through clubs, associations and specialty publications as well as non-commercial travelogues aired over the Japanese public television network (NHK and affiliated channels).

Another misconception evident from this survey is the far-away distance of Alaska in comparison with other so-called long-haul destinations, and the time/cost constraints involved in getting there. In point of fact, Alaska is closer than either Europe or the popular U.S. East Coast destinations which attract virtually millions of Japanese tourists annually.

It is perhaps also worthy of mention that according to the Ministry of Justice the fastest-growing segment of Japanese outbound travellers consists of younger people in the 15-24 age group. As the importance of this group increases, so the relevance of the head of the family as the destination decision maker tends to diminish. At this juncture the 15-24 rate of increase is as much as 8 percent per annum. To contend with this explosive growth new strategies and appeals must be developed, with more emphasis on activities which are responsive to their wants and needs.

In Japan, the knowledge of Japanese travellers and potential tourists represents only one side of the coin. Equally important functions are the views of travel agents and tour organizers. While in many Western countries, these functionaries are viewed more or less as booking agents, Japanese vacationers look upon them as consultants whose recommendations are sought and acted upon. Unless the agent or wholesaler has an intimate knowledge of all that Alaska has to offer, chances are that a more familiar destination will be recommended.

Our recommendation is therefore that a further study should be conducted among two levels of travel trade professionals - those who man the agency counters and have direct contact with the public, and those at the executive/administrative level who are responsible for providing the guidelines and organizing the various tour packages. By taking a pulse on the extent of their cognizance of Alaska in a frame of reference of similar-distance competing countries, it should be possible to suggest appropriate strategies and campaigns to contend with any areas of haziness or apprehension.

German Traveller Study

carried out for: Alaska Visitors Association
Marketing Council
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3057 70th Avenue SE
Mercer Island, WA 98040 (USA)

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Project no. 46 022
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ANNEX: QUESTIONNAIRE (IN GERMAN)

A. OBJECTIVES OF SURVEY

The Alaska Visitors Association Marketing Council, Anchorage, Alaska, commissioned Marplan Forschungsgesellschaft mbH to carry out a marketing study to analyze the size and the structure of the potential visitors to Alaska. This study has been conducted in the USA in 1976 with a similar questionnaire. To achieve comparable data sets it was decided to use similar concepts to the U.S. version in Germany and Japan.

In accordance with the U.S. study several strata are to be considered within the market potential. The modest form of the market potential are the

a) Prospects

who are head of households, responsible for or taking part in decision making for vacations, who took vacations of at least one week in the past three years and who took vacation in a place of at least 3.300 km one way from home in the past five years.

Further groups are:

b) Acceptors

who are prospects who show interest in an Alaska vacation (3 to 5 on a 1 to 5 interest scale).

c) High Potentials

who are acceptors having taken two or more long-distance vacations in the past five years and spent at least 3.000 DM per person on the last long-distance trip.

d) High Profiles

who are prospects, 35 years of age and over with 5.000 DM household income minimum and without children at home.

e) Visitors

Persons having visited Alaska during the past three years.

To work out an optimum marketing concept we have to have some information about the travel behaviour (part 1), the information behaviour (part 2), travel motivations (part 3) and the perception and image Alaska has among prospects.

All questions of the interviews were analyzed and cross tabulated against the potential groups a) to e), demographic variables with touristic relevance as sex, age, education, size of community, children in household and typology. The typology of five attitude types of travel motivations was the result of a cluster analysis. It is a multivariate statistical procedure to get a condensed version of the motivation question (qu. 8). The typology allows a more differentiated analysis of the target group and to design a more specific communication strategy of the benefits of Alaska journeys.

We received five significant groups with specific demands towards travelling:

1. The first type we called the "fun-type", who loves amusement, wants to relax during vacation and is not very interested in culture.
2. The second type we called "adventure-type", he is the one who is most interested in nature and wildlife, also in foreign cultures and likes to hike and camp.
3. The third type is the "sportive/conventional type" who is interested in sports activities (tennis, skiing, etc.). He expects a big range of offers of entertainment and sports activities. But he does not seek as much adventures as other types. Special needs for family vacation must be met.
4. The fourth type we called "visitor-type". He is the one who visits friends and relatives on his long-distance trips to save money.
5. The last type is the "education-type". He is interested in culture and nature. Sports activities are of no interest to him.

We have to point out that within this report only the most relevant results for your marketing actions can be shown. More information can be found in the separate set of tables.

B. SAMPLING AND WEIGHTING PROCEDURES

To have a sound statistical basis for analyzing size and structure of the Alaska tourism market potential in West Germany, the methodological concept had to construct a basis sample which enables to interview 500 prospects (market potential) in a second stage. The total procedure therefore was:

Phase 1: Screening Interviews

Target group for the screening interviews are telephone households in West Germany. The selection of the interviewees was two-fold. In the first stage, the ADM-Master Sample was used with 525 sample points. This sample is representative for West-German households and is a stratified probability sample.

Within the sample points the addresses were drawn at random on the basis of telephone books.

The purpose of the screening interviews was to get information about the potential within the total population and to get the addresses of persons belonging to the target group.

Phase 2: Full Interviews with prospects

489 respondents belonging to the target group were found during the screening interviews. They have been re-interviewed with a full questionnaire. The target group consisted of:

a) prospects: Head of households or one other person in a household who makes or shares in vacation decisions and had taken vacation of at least a one-way distance of 3.300 km.

Weighting: Because of sampling errors, drop-outs and other circumstances the sample had to be weighted. For weighting the following factors were used:

Region, size of community, size of household. Basis for the weighting was the official household statistic of Microcensus.

The tabulation of the results show in the first line the unweighted number of respondents belonging to a group and below a projection in 1.000 households.

Technical details:

| | |
|---|-------------------------|
| Screening interviews | 5,987 households |
| Out of these were found prospects belonging to target group | 667 households |
| re-interviews with full questionnaire response rate | 489 households 73.3% |
| Target group (prospects) as percentage of total number of households (25.3 Mio.) | 11.2% |
| Target group in numbers approximately | 2.84 Mio- |

All interviews - screenings and full inter-
views - were carried out between
September 10 and October 8, 1986

| | |
|-----------------------------------|-----|
| Number of interviewers on the job | 153 |
|-----------------------------------|-----|

C. RESULTS

1. Travel Behaviour In General

As described in the preface to this report the complete study was carried out in two parts. The target of the first part (screening interviews) was to recruit respondents for the main part of the study and to find some information according to the general behaviour of the German population. Taking the 25,320 Mio. German Households as a basis the findings are that in 68,0%, which means roughly 17 Mio. German households there is at least one person taking a vacation trip lasting one week or longer during the past three years. If we restrict vacation trips to those who went to places with a one-way distance of at least 3.300 km there are still 11,7% (approx. 3 Mio.) found who travelled to these more distant places within the past five years. Reduced by those who travelled to places 3.300 km away during the past five years but did not have vacation of at least one week during the past three years, the final target group for this study is 11.2%, equivalent to 2,840 Mio. households.

| | <u>in 1000</u> | <u>in Percent</u> |
|---|----------------|-------------------|
| Total of West-German households | 25,320 | 100.0 |
| With one or more persons having vacation of at least one week during the past three years | 17,230 | 68.0 |
| Having vacation in places at least 3.300 km away from home during the past five years | 2,950 | 11.7 |
| Visited places in 3.300 km distance for vacation during the last five years and having at least one week vacation during the last three years | 2,840 | 11.2 |

Within the target group the study differentiates between prospects, acceptors, high potentials, high profiles and visitors according the terminology of AVA.

Prospects, the target group for the main study,

Acceptors, those who state interest in an Alaska vacation,

High potential, acceptors who have taken two or more long-distance vacations in the past five years

High profiles, prospects 35 years of age or more with a household income of 5.000 DM net per month as a minimum and finally

Visitors, persons known to have visited Alaska for a pleasure or pleasure/business trip in the past three years.

This study shows the following size of these five groups:

| | Households in 1000 | Percentage of Prospects | | Percentage of total households | |
|----------------|-----------------------|----------------------------|------|-----------------------------------|-------------|
| Prospects | 2,840 | 100,0 | 30,7 | | U.S. - 1990 |
| Acceptors | 1,068 | 37,6 | 2,3 | 11,3 | 13,1 |
| High potential | 282 | 9,9 | 1,0 | 1,1 | 1,5 |
| High profiles | 93 | 3,3 | | 0,4 | 2,7 |
| Visitors | 42 | 1,5 | | 0,16 | 3,3 |

Evaluating these results one has to take in consideration that at least the groups "high profiles" and "visitors" are based on very small numbers of interviews, i.e. for

| | |
|--------------|---------------|
| high profile | 16 interviews |
| visitors | 7 interviews |

Even the group "high potentials" is based on 43 interviews only.

1.1. Structure of Market Potential

For developing marketing strategies AVA has to know which is the structure of the most promising target groups. Accepting that the "value" of the groups is increasing from prospects over acceptors to high potential one has to analyze which socio-demographic groups are increasingly participating on these groups. Education seems to be one of the key elements. The percentage of people with elementary school goes down from 27,7% in the group of prospects to 20,5% among the acceptors to 16,1% within the high potentials. But already the percentage of people with senior high school is going up (from 44,4% to 48,9%). Taking together people with elementary school or better education we find that they make 72% of prospects, 79% of acceptors and 84% of high potential.

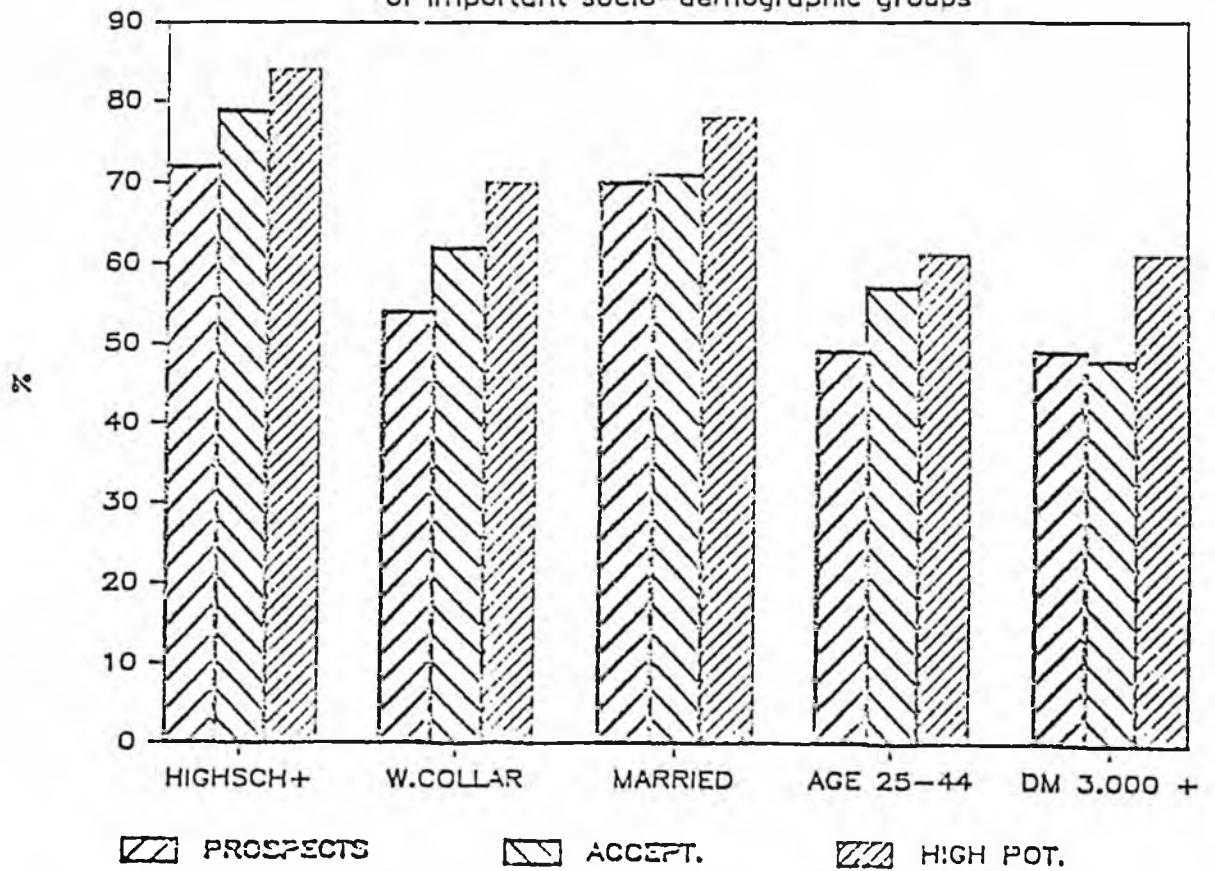
There is of course a certain dependency of education and profession and therefore it is not astonishing knowing the results mentioned above that senior personnel in leading positions and white-coliar junior executives form another prospective group. They participate with 54% among prospects, 62% among acceptors and 70% among high potential.

Not only because they form the majority in the population married people are a promising target group. We find them at 70% among prospects, 71% among acceptors and 78% among high potentials.

Looking at the age groups we have to accept that neither the young nor the elder people are of high interest. The real target group are people starting in the mid-twenties up to the mid-forties. And, of course, if we come to far-distance travelling income is an important factor. Therefore, the percentage of those having a household income of 3.000 DM net per month and more is growing from 49% to 61% going through target groups from prospects to high potentials.

PERCENTAGES IN TARGET GROUPS

of important socio-demographic groups



On the other side: for people who are interested in Alaska as a possible vacation destination it is not important whether they have children or not.

Knowing the structure in West-Germany it is not astonishing to learn that people living in places up to 20.000 inhabitants are nearly as much interested as people in bigger communities. On the contrary, in the big cities and centers of population we find going from prospects to high potential a decreasing percentage going from

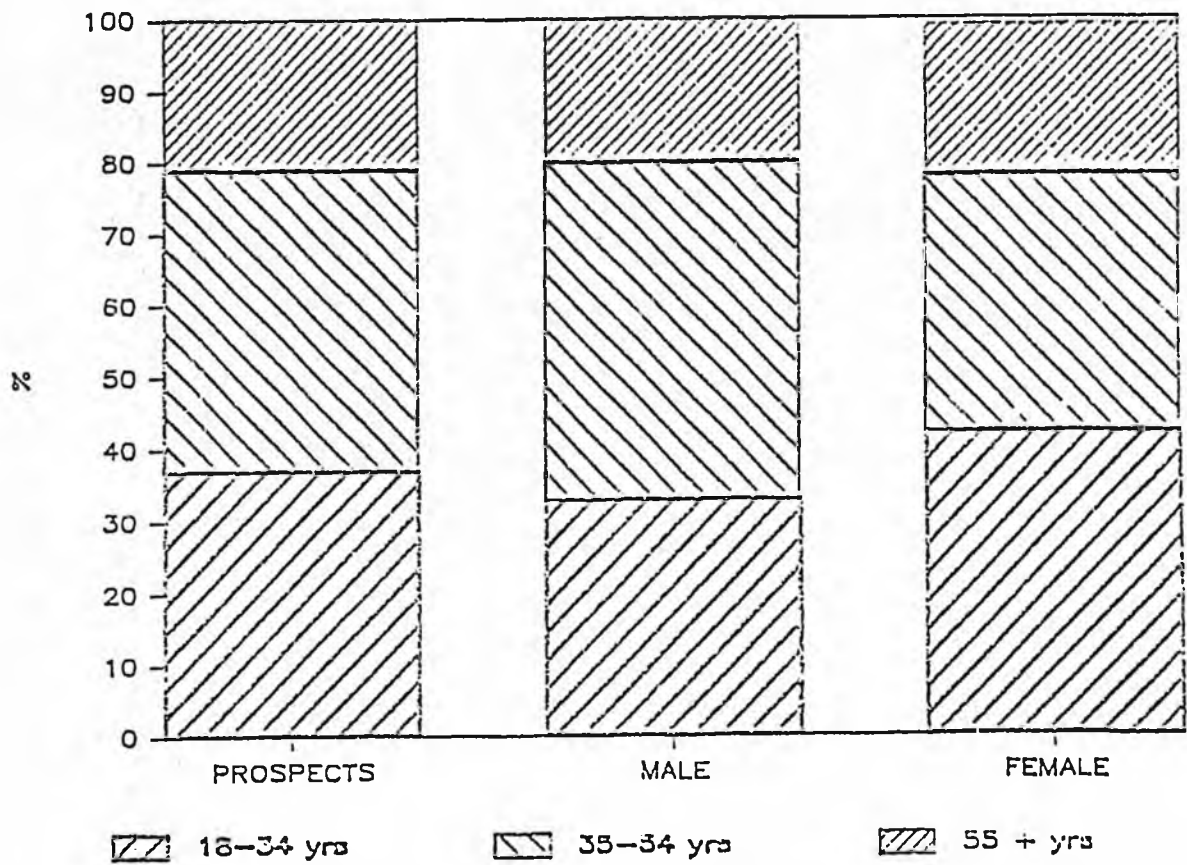
| | |
|----------------|----------|
| prospects | 50,8% |
| acceptors | 42,6% to |
| high potential | 38,6%. |

Here the most interesting target group could be the population living in places from 20.000 to 500.000 inhabitants but unfortunately compared with those living in the real big places, they are a minority.

Although the regions don't differ too much, Hamburg as well as Bavaria show a remarkable higher percentage among the high potential but on the basis of 43 interviews this does not mean too much. It cannot be proven by the figures but it seems to be a tendency that the more "world-open" places as Hamburg, Rhein-Main-Area and Munich might be of special interest.

At a first glance one cannot recognize a difference between male and female interviewees. But if one analyses the figures deeper one comes to interesting results. Female singles, widowed, divorced or separated living people seem to be more active than their male counterparts and if one analyses the prospects by age and sex one can see that younger females are much more interested than the younger males.

PROSPECTS BY SEX AND AGE



1.2. Travelling Experience

By definition already our target group had to have at least one one-week vacation during the past three years and one long-distance vacation during the past five years. In reality we find that respondents on the average did one vacation of at least one week per year. Over five years it accumulates to an average of 5.3 vacations per person.

For vacations where they had to go to places at least 3.300 km away from home the story is different. During the past five years they had 1.8 vacations of this type. Concerning the number of vacations they had there is a remarkable variation.

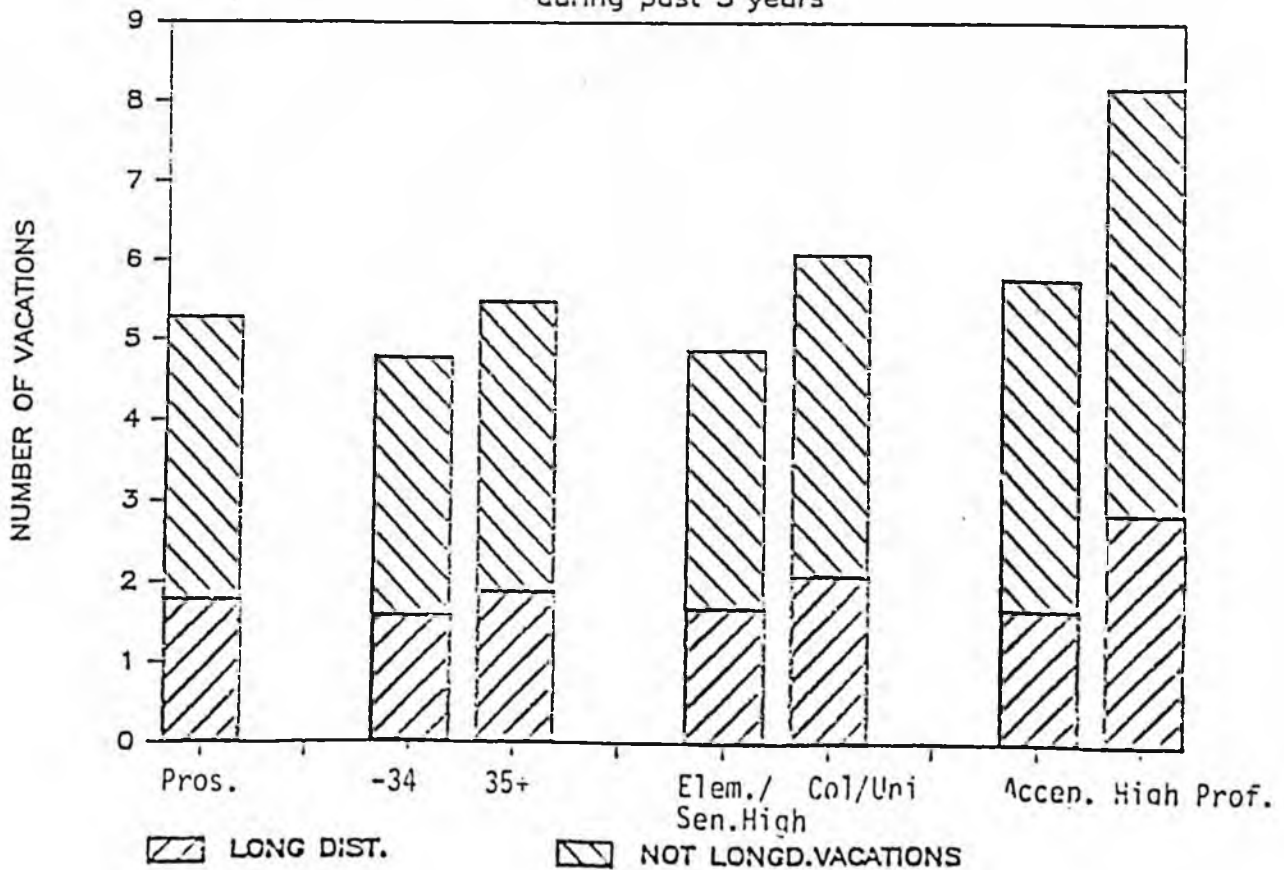
| | Number of vacations during past 5 years | |
|----------------------|--|-------------------|
| | 1 week % | far distance % |
| n = 489 | | |
| 1 vacation | 10,2 | 62,2 |
| 2 vacations | 9,6 | 21,9 |
| 3 vacations | 13,6 | 5,3 |
| 4 vacations | 11,1 | 3,9 |
| 5 vacations | 23,6 | 4,4 |
| 6 vacations and more | <u>31,9</u> | <u>2,3</u> |
| | 100,0 | 100,0 |
| Mean | 5.3 | 1.8 |

Nearly two third of our prospects had only one vacation leading to far-distant places compared with only 6,7% saying they had five or more far-distant vacations during the past five years. On the other side more than half (55,5%) of our respondents had five or more vacations of at least one week during the past five years.

If we compare the travel experience among different sub-groups we find the highest frequency of long-distance travelling among the high potentials. On the average they had 2.9 long-distance vacations during the past five years and belong to the group of "high-frequent-vacationers" if it comes to have vacations of one week or more at all. On the average they had 1.5 vacations per year during the past five years.

AVERAGE NUMBER OF VACATIONS

during past 5 years



1.3. Destination Countries

Asked where they spent their vacation during the past five years European countries are dominating of course. Because they are not of relevance to this study we have to concentrate on Overseas countries visited during the past five years.

Most of the respondents (nearly one third) say they had visited the United States. Second as a single country ranks Canada with 14,5%. Asian destinations were mentioned by 32,1%, Africa by 25,9%, Latin America and Caribbean destinations by 20,4%, Australia and New Zealand by 3,9%. Alaska is mentioned by 1,8% which is equal to approximately 50 000 West-German households.

44.5%
32.1%
25.9%

| | % of Prospects | Travel groups in 1000 |
|--------------------------------------|-------------------|--------------------------|
| USA | 31,3 | 890 |
| Canada | 14,5 | 413 |
| Africa | 25,9 | 734 |
| Middle East | 8,5 | 241 |
| South/Southeast Asia | 18,6 | 529 |
| East Asia, South Pacific | 5,0 | 141 |
| Australia/New Zealand | 3,9 | 112 |
| Hawaii | 2,5 | 71 |
| Caribbean | 9,3 | 263 |
| Mexico | 4,6 | 131 |
| Rest of Central and South America | 6,5 | 184 |
| Alaska | 1,8 | 51 |

As far as they visited the United States the main regions they went to were:

| | |
|-----------------------|-------|
| New York/Rhode Island | 37,2% |
| California | 35,4% |
| Florida | 19,1% |
| Texas | 15,6% |

Analyzing the results by our sub-groups acceptors and high potentials one can see that nearly all regions are more frequented by acceptors than by the prospects and again more by the high potentials than by the acceptors. The percentage of the visitors of the United States goes from 31,3% to 38,8% and 44,7%, those visiting Canada from 14,5% to 22,1% to 33,4%. Even the figure for visitors to Alaska shows a dramatic increase starting with 1,8% among prospects coming to 3,9% among the acceptors and finally 12,8% among high potentials. But it has to be said again that these results are based on very small figures.

As explained in the preface to this report already Marplan calculated a typology of the respondents based on their travel motivations.

United States and Canada show the highest percentage among conventional travellers and visitors. Mexico and the Caribbean Islands are preferred by the fun-type. The educational traveller prefers the Middle-East and plays an important part also in other Asian countries. Hawaii attracts the fun-type very much.

| | fun | advert. | convent. | visitors | educ. |
|-----------------------|-----|---------|----------|----------|-------|
| | % | % | % | % | % |
| USA/Canada | 25 | 41 | 61 | 57 | 44 |
| Alaska | - | 4 | 3 | 1 | - |
| Mexico/Carribbean | 24 | 12 | 14 | 2 | 17 |
| South Africa | 4 | 9 | 6 | 6 | 7 |
| Middle East | 5 | 9 | 5 | 9 | 17 |
| Other Asian countries | 24 | 24 | 16 | 27 | 30 |
| Australia/New Zealand | 2 | 4 | 7 | 4 | 1 |
| Hawaii | 7 | 2 | 2 | - | 1 |

After the question which region they have visited during the last five years the question was asked which one was the furthest. Of course, it brings the percentages down because double countings are eliminated. But this effects the different regions in a different way. United States dropped from 31,3% to 23,7%, Canada from 14,5% to 10,0%, South/South-East Asia from 18,6% to 14,3%, the Carribbean from 9,3% to 8,0%. This indicates that for instance the Carribbean is a destination for itself; if somebody goes to the Carribbean it is the furthest destination on this trip.

This is different for Alaska as well as for Hawaii. The figures indicate that Hawaii as well as Alaska are not final "destinations" but more places to have a stop-over when travelling around the world or in case of Alaska being on a flight to e.g. East Asia. Hawaii drops from 2,5% to 1,2%, Alaska from 1,8% to 0,7%.

1.4. Travel Expenditures

Asked for the money they spend for the journey - in case they did more than one trip during the past five years they were asked for the furthest destination - answers differ widely. Some claim they used less than 1.500 DM, others more than 6.000 DM per person. On the average it is calculated with 3.865 DM per person. The average amount per person spent differs with the destinations as well as with different socio-economic groups but also between the types mentioned above already.

| Destination: | Average spending per person |
|-----------------------|--------------------------------|
| Hawaii | 6.465 DM |
| South America | 6.220 DM |
| Australia/New Zealand | 5.255 DM |
| Mexico | 4.574 DM |
| South Asia | 4.454 DM |
| East Asia | 4.101 DM |
| USA | 3.913 DM |
| Caribbean | 3.713 DM |
| Africa | 3.423 DM |
| Alaska | 3.418 DM |
| Canada | 3.312 DM |
| Middle East | 2.962 DM |

Hawaii, Central and South America are the places where they spend the most money, Middle East but also Canada, Alaska and Africa are countries where they spend significantly less. There are different reasons for the differences as availability of reasonably priced package tours or - true certainly for the United States - a high percentage of the visitor type living with friends or relatives in the country of destination or when travelling through several destinations costs for one destination was not so high (e.g. Alaska).

If we analyze the target groups of AVA we find that "high potentials" are high spenders. The average among high potentials is 5,465 DM per person compared to 4,192 DM per person among the acceptors and in average 3,865 DM among the prospects in total.

Among our cluster types we found the lowest spending among the visitors with 2.840 DM.

1.5. Type of Tourism

Again asked if one than more far-distance vacation was taken during the past five years for the furthest destination the respondents were asked what kind of trip it was. The answers show:

| | |
|---|-------|
| * all-inclusive group tours with travel guide | 27,7% |
| * all-inclusive tours without travel guide | 20,9% |
| * self-organized trips | 50,5% |

The highest proportion of self-organized trips we find among the group of "visitors" (78%) followed by the "adventurers" (58,5%). "Fun" and "educational" travellers organize their trip themselves far less. Educational travellers prefer all-inclusive group tours with a travel guide (51,6%). Even if about half of the travellers organize their trip themselves they ask a travel agent for help and if only to book the transportation.

Again we find remarkable differences according the places the respondents went for vacation.

| | self organized % | organized % |
|-----------------------|------------------------|----------------|
| Alaska | 100 | 0 |
| Australia/New Zealand | 91 | 9 |
| Canada | 82 | 18 |
| Central/South America | 79 | 21 |
| USA | 68 | 32 |
| East Asia/Pacific | 52 | 48 |
| Middle East | 47 | 53 |
| South Asia | 46 | 54 |
| Mexico | 38 | 62 |
| Hawaii | 26 | 74 |
| Africa | 17 | 83 |
| Carribbean | 15 | 85 |

2. Information Behaviour

The travel agent is the most important source of information. 72,6% of the respondents say they ask their travel agency for information if they start to prepare a long-haul trip.

Other important sources are

| | |
|------------------|-------|
| Friends | 40,9% |
| Travel guides | 34,3% |
| Automobile club | 12,3% |
| Tourist agencies | 11,9% |
| Books | 8,1% |

In case one asks the travel agency for information it concerns mostly prices followed by accommodation and transportation facilities; but also 48,3% of the respondents declare they look for information to which country to go.

There are many resources and publications where one can find out through which media channels one can reach certain target groups. Nevertheless, within the study respondents were asked with a list which magazine they read frequently. Prospects as well as acceptors and high potentials read magazines more frequently than average Germans. Within the list ADAC Motorwelt, Stern and Hör Zu are the magazines with the highest coverage. A comparatively small magazine but in a special interest group "Geo" reaches 20,5% of prospects, 23,5% of acceptors and 38,8% of high potential. With a combination of ADAC Motorwelt plus Geo plus Stern one can reach among

| | |
|-----------------|-------|
| Prospects | 67,0% |
| Acceptors | 71,2% |
| High potentials | 85,1% |

3. Travel Motivations

What are the reasons why Germans travel in their vacation time to far-distant places. Respondents were asked to rank on a 5-point scale how much they like to do some things when they go on vacation. Point 5 equals I like to do it very much and point 1 equals I don't like it at all.

According to these rankings we find the following rank order:

| | |
|---|-----|
| Learn about different cultures | 4.3 |
| Sightseeing in cities | 4.1 |
| Dine-out in fine restaurants | 4.1 |
| Visit national parks and scenic wonders | 4.1 |
| Swim and sunbath | 4.0 |
| See wildlife in its natural habitat | 3.8 |
| Go shopping | 3.5 |
| Take trips that offer adventure and challenge | 3.4 |
| Visit museums | 3.3 |
| Enjoy nighttime entertainment | 3.2 |
| Visit friends and relatives | 3.2 |
| Camp, hike, outdoor activities | 2.9 |
| Wintersports | 2.5 |
| Playing possibilities for children | 2.3 |
| Play tennis/golf | 2.1 |
| Fishing | 1.7 |

As mentioned before these ratings were used to calculate a typology for the respondents. A logical clustering came out with five different types. They were named:

| | |
|-----------------------|------------|
| Fun-type | 19% |
| Adventurer | 20% |
| Sportive type | 24% |
| Visitor | 18% |
| Educational traveller | 19% |
| Total | <hr/> 100% |

Of course, there is a certain overlapping between the five types but each one of them has its unique strength and can be described as follows:

"Fun" prefers to dine, swim and sunbath and enjoys nighttime entertainment.

"Adventurer" likes to visit natural parks, to camp, hike, take trips but learns about cultures also.

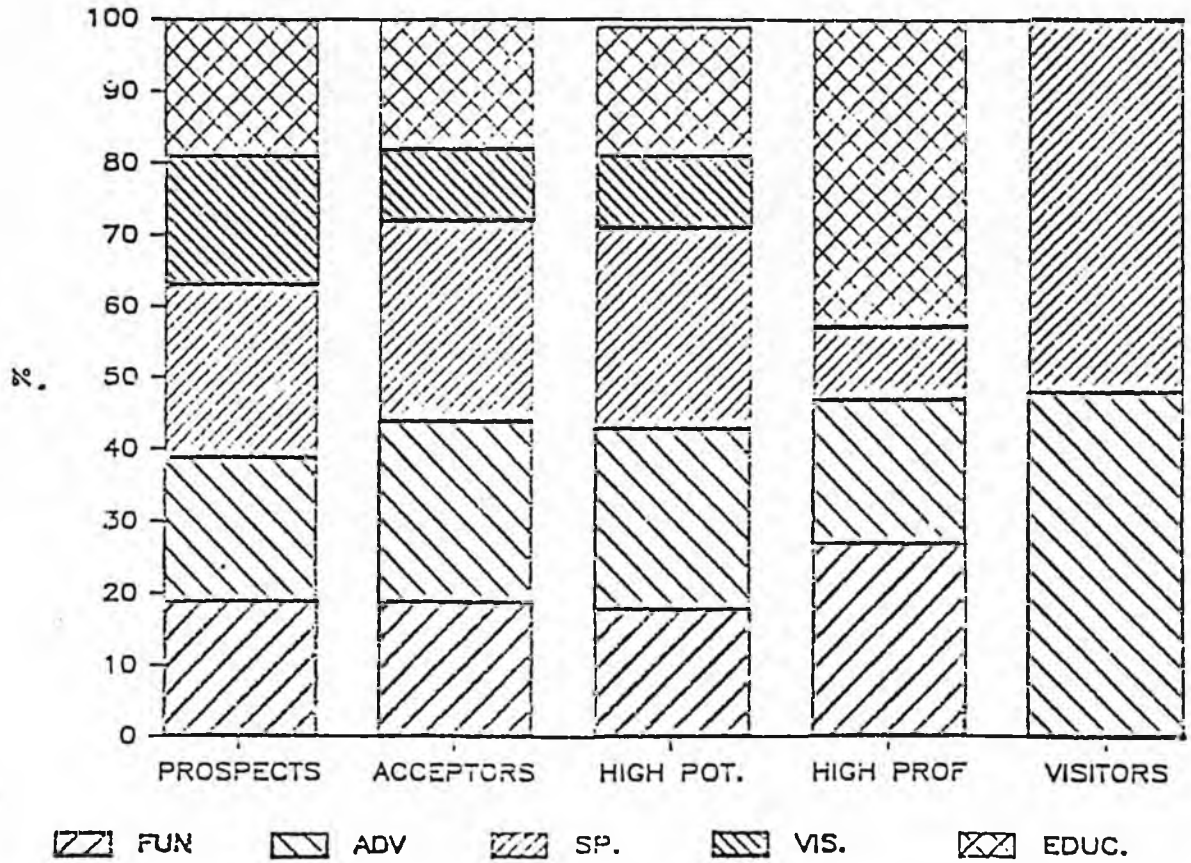
"Sports" likes to swim, likes wintersports, tennis, fishing, wildlife.

"Visitor" is mainly interested in seeing friends and relatives.

"Educational" likes to go sightseeing, visits museums and likes to learn about cultures.

If we look how the picture fits into the target group we find adventurers and sportive travellers above average among the acceptors but in the high potential group only the adventurers are above average this time together with the educational type. High profiles are dominated by the educational type of traveller but if we come to the small group of visitors of Alaska we find only adventurers and sportive types.

CLUSTER BY TARGET GROUPS



4. Perception and Image of Alaska

4.1. Spontaneous Associations

To all respondents the question was asked: "What is the first thing that comes to your mind when you think about Alaska?" Within all very open associations there is a lot of things mentioned by the respondents. But there are some items the answers concentrate on. The image of Alaska is to be a cold country and it is proven by answers as

| | |
|-----------------------------------|-------|
| Coldness | 50,1% |
| Winter, snow, ice | 29,6% |
| Glacier, snow mountains, icebergs | 8,8% |

and some other things mentioned in this open-ended question. The next dimension we can find is the image of untouched nature expressed in

| | |
|-------------------------------|-------|
| clean, untouched nature | 11,6% |
| icepears, bears, wild animals | 11,7% |
| wide, big country | 7,8% |
| wildlife | 7,5% |
| landscape, nice sceneries | 5,7% |
| forest | 3,1% |
| lakes, sea, rivers | 3,0% |

and many others. Another dimension partly seen very close to the second is the relaxing aspect of Alaska shown by answers as

| | |
|-----------------------------|------|
| solitude, silence, relaxing | 9,9% |
| not many people | 4,4% |
| not much tourists | 1,6% |

The second and third dimensions are the more important for the group of acceptors and high potentials.

4.2. The typical Alaska Traveller

If we ask the respondents to describe the kind of people they think people like to have vacations in Alaska are, there are only three types mentioned by more than 10% of the respondents. Mostly it is

| | |
|-------------------------------------|-------|
| the adventurer | 37,1% |
| people who love nature | 20,9% |
| people who love silence, loneliness | 9,8% |

If we take all different types of sports activities together a fourth group can be formed by sportsmen (14,5%).

4.3. Alaska ranked on Image items

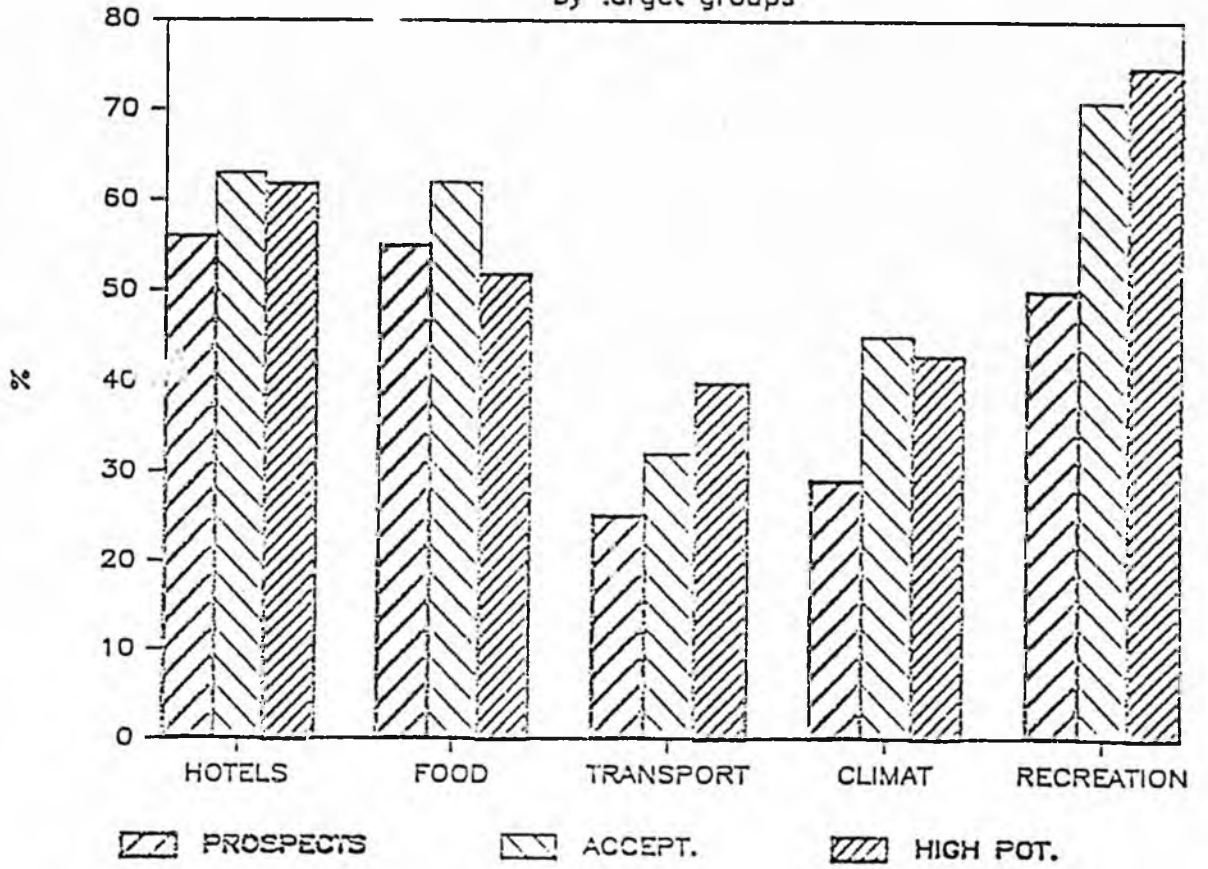
To see a country as an attractive opportunity for vacation it has to offer certain facilities. Vacationers ask for a certain standard in hotels, food, transportation, have some ideas about the climate they want and finally the overall aspect of value for recreation. The image profile of touristic Alaska is not at all excellent, if it comes to the best than it is good. Taking excellent and good together, 56% of the respondents believe they could be satisfied with the hotels and motels in Alaska, 55% believe in good food, 50% that there is a possibility for good recreation but only 29% believe in the climate and 25% in the transportation system.

| | Hotels | Food | Transp. | Climate | Recr. |
|-----------|--------|------|---------|---------|-------|
| | % | % | % | % | % |
| excellent | 5 | 8 | 3 | 6 | 14 |
| good | 51 | 47 | 22 | 23 | 36 |
| fair | 35 | 39 | 42 | 36 | 33 |
| poor | 9 | 6 | 32 | 33 | 16 |
| MEAN | 2.5 | 2.4 | 3.0 | 3.0 | 2.5 |

But again acceptors and high potential see Alaska more positive.

ITEMS RANKED EXCELLENT OR GOOD

by target groups



Then again the respondents were shown the list of items they knew already from the question what they like and don't like for their vacation (qu. 8). Taking the rank order of their likes for vacation and comparing it with the rank order for how they see Alaska one can see that Alaska does not fit easily into their picture of an ideal country for vacation.

| | Rank on | |
|----------------------|-------------------|-------------|
| | Likes on vacation | Alaska seen |
| learn about cultures | 1 | 4 |
| sightseeing | 2 | 9 |
| dining | 3 | 8 |
| natural parks | 4 | 2 |
| swim/sunbath | 5 | 14 |
| see wildlife | 6 | 1 |
| shopping | 7 | 10 |
| visit museums | 8 | 11 |

If we take the most important items for vacation and compare them with the ranks they have for Alaska we find that only four are the same. The most important point for vacation to learn about cultures is ranked "4" in Alaska, the second important point sightseeing is ranked "9" and the third dining is ranked "8". But visiting national parks and see wildlife are the two most important things one can do in Alaska according to the opinion of the respondents.

So far the results based on ranks and averages. But to go to Alaska for vacation is an individual decision and one has to find out to what extent personal ideas of vacation are satisfied by the image one has of Alaska vacation. In a cross tabulation we tried to find out and calculate the percentages of those who agreed that they would like (point 4 and 5) to find certain circumstances on their vacation and agreed again (point 4 and 5) that they believe this could be found in Alaska. Under this perspective the situation looks far better.

| | Prospects | In 1.000 |
|--------------------------------|-----------|----------|
| | % | % |
| learn about different cultures | 66 | 1.876 |
| visit national parks | 62 | 1.760 |
| see wildlife | 58 | 1.650 |
| dining | 35 | 1.000 |
| sightseeing | 31 | 880 |
| camp/hike | 30 | 850 |
| wintersports | 25 | 720 |
| shopping | 19 | 550 |

66% of the respondents like to learn about different cultures during their vacation and believe there is a possibility for it in Alaska. The potential behind this in numbers is roughly 1.870.000 households in Germany.

62% of the respondents like to visit national parks and believe it could be done easily in Alaska. 58% like to see wildlife and believe they could do it in Alaska, and so on. Here seems to be a quite impressive potential for future tourism.

4.4. Ideal Travel Season

Alaska is seen as a cold country and therefore it is natural that most of the respondents think that summer would be the right time to visit Alaska. In detail they would prefer as their season in Alaska:

| | |
|--------|-------|
| Spring | 14,9% |
| Summer | 68,5% |
| Autumn | 9,6% |
| Winter | 4,6% |

4,7% have no idea which time of the year they would prefer or declare they would not go to Alaska at all.

4.5. Interest in going to Alaska for Vacation

Even if only 8,2% of the respondents say they would be very interested in spending one of their vacations in the next five years in Alaska it still represents a potential of 232.000 households. Knowing that most of the far-distant travellers don't travel alone it might represent a total of 400.000 to 500.000 persons. If we analyze interested (points 4 and 5), undecided (point 3) and not interested (points 1 and 2) by different sub-groups we find the following picture:

INTEREST IN ALASKA VACATIONS

by prospects, clusters, sex and age

