



Valdez Visitor Market Profile

Prepared for:
City of Valdez

Updated February 2017



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Table of Contents

- Executive Summary..... 1**
- Introduction and Methodology..... 5**
- Visitor Volume..... 8**
 - Total Visitor Volume..... 8
 - Visitor Volume by Mode..... 8
 - Highway..... 8
 - Ferry..... 8
 - Air..... 9
 - Cruise..... 9
- Visitor Survey Results 10**
 - Trip Purpose..... 10
 - Lodging and Length of Stay..... 10
 - Activities in Valdez..... 11
 - Satisfaction Ratings..... 12
 - Trip Planning..... 14
 - Visitor Spending..... 18
 - Demographics..... 19
- Appendix..... 24**
 - Trip Planning by Gender and Age, Summer Visitors..... 24
 - Comparative Satisfaction Ratings..... 25

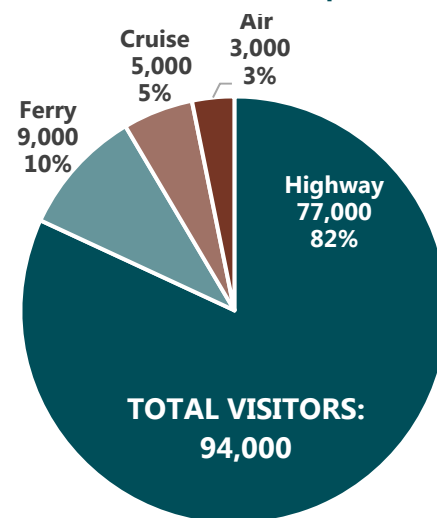
Executive Summary

The City of Valdez contracted with McDowell Group to conduct a survey with Valdez visitors over a seven-month period in 2016. The purpose of the survey was to gain a better understanding of Valdez' complex visitor markets: their activities, length of stay, satisfaction, trip planning behavior, and demographics, among other subjects. A total of 515 visitors were surveyed, including 415 in the summer months (May to September) and 100 in winter (February through April). The sample focuses on independent travelers that can be impacted by Valdez marketing efforts. The sample excludes cruise and cruise-tour passengers and people traveling only for business. The project also included an estimate of visitor volume over the 12-month period of October 2015 through September 2016 based on highway, ferry, air, and cruise traffic data. Following are key findings from the study.

Visitor Volume

- Valdez hosted an estimated 94,000 pleasure visitors between October 2015 and September 2016. Four-fifths (82 percent) of visitors exited via highway; 10 percent via ferry; and 3 percent via air. Five percent were cruise passengers who exited via motorcoach or catamaran.
- Summer visitation accounted for 92 percent of annual volume (86,500 visitors), while winter represented 8 percent (7,500 visitors).
- Visitors from outside of Alaska represented 66 percent of annual volume (62,500), while Alaska residents represented 34 percent (31,500).

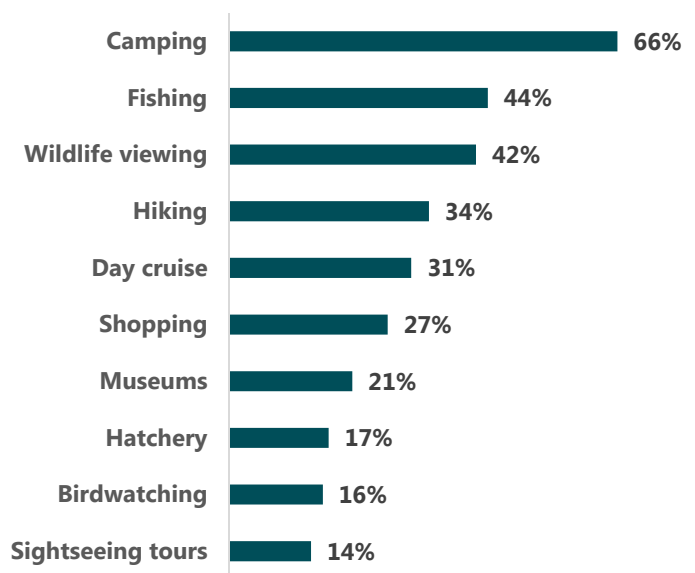
Estimated Valdez Pleasure Visitor Volume by Exit Mode, October 2015-September 2016



Visitor Activities

- Camping (including RV camping) was the number one activity reported by Valdez visitors, followed by fishing, wildlife viewing, and hiking.
- Respondents from outside Alaska were more likely to participate in wildlife viewing, day cruises, and sightseeing tours. Alaska residents were more likely to participate in camping, fishing, and biking.
- Winter visitors' top activities were skiing/snowboarding, snowmachining, visiting friends/relatives, hiking, and ice climbing,

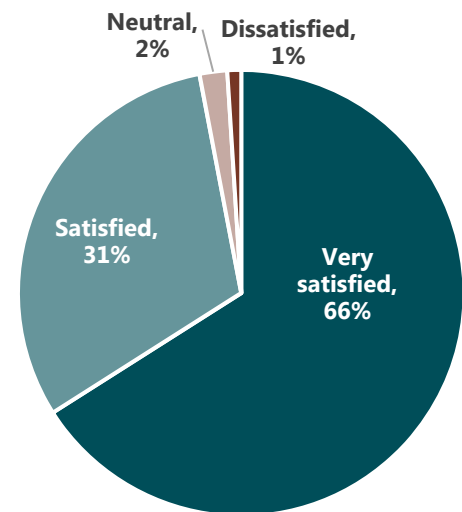
Top Ten Valdez Activities, Summer Visitors



Satisfaction with Valdez

- Summer visitors expressed a high degree of satisfaction with their overall Valdez trip, with 97 percent either very satisfied (66 percent) or satisfied (31 percent). Only 1 percent were dissatisfied, and zero were very dissatisfied.
- Alaska residents gave higher satisfaction ratings, at 83 percent very satisfied, compared to 58 percent of non-residents.
- The highest-rated categories were sightseeing, friendliness of residents, and tours/activities. The lowest-rated categories were shopping and value for the money.
- Winter visitors also gave high satisfaction ratings to their overall Valdez experience, at 71 percent very satisfied and 27 percent satisfied. Just 1 percent were dissatisfied.

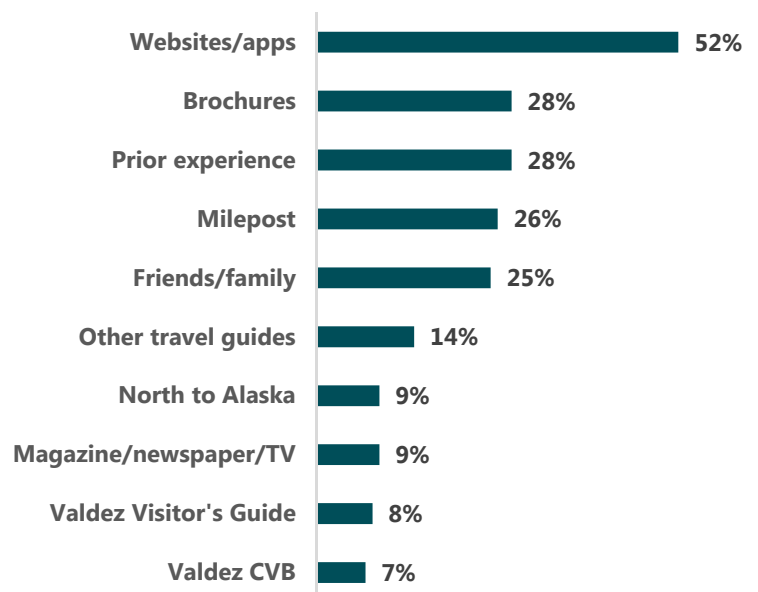
Satisfaction with Overall Valdez Trip, Summer Visitors



Valdez Trip Planning

- Just over half of summer respondents (52 percent) said they used the internet (including apps) to plan or book their Valdez trip.
- Among those who used the internet, the most popular sites for planning were Google (51 percent), ValdezAlaska.org (12 percent), AMHS (10 percent), and TripAdvisor (10 percent).
- Other popular sources of information included brochures (28 percent), prior experience (28 percent), the Milepost (26 percent), and friends/family (25 percent).
- Winter visitors were more likely to use the internet/apps to plan their trip, at 70 percent. Among these respondents, the most popular sites were Google, Facebook, and TripAdvisor.

Top Ten Sources Used to Plan Valdez Trip, Summer Visitors



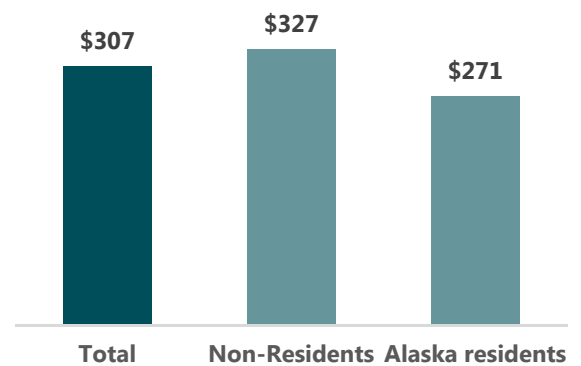
Demographics

- Just over two-thirds (69 percent) of summer visitors were from outside Alaska. Among non-Alaska visitors, the top US regions of origin were the Midwest (25 percent) and the West (20 percent). International visitors represented 29 percent of summer visitors. Winter visitors were more likely to be Alaskans at 61 percent.
- Summer visitors' average age was 52 years, compared with 35 years among winter visitors.
- Average party size was 2.6 people among both summer and winter visitors.

Visitor Spending and Economic Impacts

- Summer visitors reported spending an average of \$307 per person in Valdez. Average spending was slightly higher among visitors from outside Alaska (\$327) compared to Alaska residents (\$271).
- By category, tours/activities represented the highest average spending at \$105 per person, followed by lodging at \$78 per person and food/beverage at \$62 per person.
- Winter visitors reported spending an average of \$723 per person. In addition, heli-skiers reported an average package price of \$7,600 per person.
- Total spending by summer pleasure visitors, not including cruise passengers, is estimated at \$32 million.
- Total spending by winter pleasure visitors is estimated at \$9 million.

Average Per-Person Spending in Valdez, Summer Visitors



Key Findings and Recommendations

Destination marketing efforts should be prioritized for maximum influence on visitors' travel planning and booking behaviors.

- Valdez serves a wide array of markets including Alaska residents, independent visitors, cruise passengers, package tours, skiers/snowboarders, sportfishing, and other outdoor adventure-seekers.
 - When looking at the market in total, the largest segments are summer visitors (92 percent), non-Alaska residents (66 percent), and highway/ferry travelers (92 percent).
 - Valdez attracts a high percentage of international visitors, primarily from German-speaking Europe, Canada, and Australia. These visitors are known for their longer trip length, willingness to get "off the beaten path," and desire for outdoor adventure.
- The internet is an important marketing resource, used by 52 percent of summer visitors and 70 percent of winter visitors. However, summer visitors also utilize a wide array of travel planning resources including brochures, the Milepost and other travel guides, advice from friends and family, prior travel experience, and travel articles and television shows.
- Priority marketing activities include a robust website, strong relations with travel media, distribution of Valdez publications along highway corridors, and targeted use of paid advertising in frequently used travel publications. Visibility in top international markets should be a priority, using similar tactics.
- Destination marketing officials can effectively leverage marketing efforts of package tour operators, cruise lines, and other industry partners to reach smaller, but important, markets.

Recognizing that travel is discretionary and highly competitive among destinations, Valdez should seek ways to enhance the visitor experience where possible.

- This project reinforces feedback previously provided by visitors and tour operators regarding lower satisfaction ratings in Valdez when compared to other Alaska destinations.
- Among summer visitors, the lowest-rated categories were shopping (33 percent very satisfied), value for the money (36 percent very satisfied), and restaurants (food and service were each 40 percent very satisfied).

- The lowest-rated component among winter visitor was shopping (24 percent very satisfied). Three components had ratings of 31 percent very satisfied: restaurants, visitor information, and value for the money.
- McDowell Group was asked to provide context for satisfaction ratings by providing information from other studies for communities that serve similar markets.
 - The most comparable data was from AVSP VI, conducted in 2011 for the State of Alaska. Results are presented showing overall Alaska ratings for all visitors and those who visited various southcentral destinations. It is important to note that in this study visitors were asked to provide ratings for their overall Alaska experience – not for individual communities.
 - The summary table provided in the appendix reveals that statewide, Alaska visitors rate shopping, value for the money, and restaurants lower than other aspects of their trip (29, 32, and 37 percent very satisfied, respectively).
 - Valdez visitors rated these aspects of their Alaska trip lower than the overall market (21, 25, and 22 percent very satisfied, respectively), showing a correlation between the Valdez experience and overall ratings.

Although the sample size is small, winter survey data provides valuable information on visitor volume, demographics, travel planning habits, and spending.

- Recognizing that ice climbers were over-represented from adaption of sampling methods to target visitors, winter survey responses were examined unweighted and weighted.
- When weighted, top visitor activities were skiing, snowmachining, visiting friends and relatives, hiking, and ice climbing.
- Market characteristics and trip planning remained very similar between the weighted and unweighted data.
 - The winter visitor remained an average of 35 years old, predominantly Alaskan, and male.
 - Internet usage remained very high for travel planning, while use of printed marketing materials remained very low.

Additional data and analysis was provided in the report appendix, in response to discussions during presentation of the project findings to community members.

- Analysis of trip planning by age and gender revealed somewhat higher use of the internet by women and visitors under 35 years old.
- Women were more likely to use brochures and tended to consult more information sources.
- Younger visitors were less likely to use brochures and more reliant on referrals from friends and family. Although visitors under the age of 35 represent only 23 percent of the current summer market, their media and travel planning habits will become increasingly dominant among all visitors.
- Examination of satisfaction ratings from prior studies revealed that Alaska visitors rate shopping, value for the money, and restaurants lower than other aspects of their trip. (See discussion above.)

Introduction and Methodology

Introduction

Valdez has enjoyed a long history as a popular Alaska destination. It is also one of the more complex destinations from a marketing perspective, drawing large numbers of both Alaska residents and out-of-state visitors, and attracting a wide range of markets: sportfishermen, RVs, heli-skiers, package bus tours, cruise passengers, and adventure travelers, to name a few. To better understand Valdez' visitor markets, the City of Valdez contracted with McDowell Group to conduct an intercept survey of visitors to the community in both summer and winter seasons.

The "Updated February 2017" version of the report incorporates additional data and analysis following presentation of the project findings to community members. New tables in the appendix provide additional analysis of summer visitors' travel planning by age and gender. To provide context for satisfaction ratings, satisfaction ratings from AVSP VI are also included.

Methodology

This study has two major components: a visitor survey, and an analysis of visitor volume.

Visitor Survey

The survey was conducted with 515 visitors to Valdez between February and September of 2016. (Visitation in the October to January period was determined to be negligible and not justifying the expense of surveying in those months.) The survey fielding was divided into two periods: winter (February-April) and summer (May-September). McDowell Group trained local surveyors in conducting intercept surveys.

In general, respondents were screened to identify those near the end of their Valdez trip in order to capture their full range of activities and spending. Those traveling primarily for business were also screened out of the survey in order to focus on the pleasure-oriented market, reflecting the priorities of the City of Valdez in attracting more pleasure visitors.

SUMMER SURVEY

Summer surveys were conducted with 415 visitors. The majority of surveys were conducted either at the ferry terminal or RV parks (Eagle's Rest, Bear Paw, Bayside). Additional surveys were conducted in hotels, at the harbor, and in the airport.

The summer survey sample excluded cruise passengers who transit Valdez via catamaran and motorcoach/shuttle. This market would be difficult to survey due to their short time in Valdez. Other markets not captured in the survey due to logistical reasons are those on overnight motorcoach packages.

Summer survey data was weighted by survey location, based on estimated visitor traffic volumes, described below.

Survey results are presented in terms of all respondents, Alaska residents, and non-Alaska residents, reflecting how Valdez is likely to approach marketing efforts. Sample sizes and associated margins of error are presented in the following table. For example, the maximum margin of error for results based to non-Alaska residents is ± 5.4 percent at the 95 percent confidence level.

**Valdez Visitor Survey,
Summer Sample Size by Residency**

	Sample Size	Margin of Error
Non-Alaska residents	327	$\pm 5.4\%$
Alaska residents	88	$\pm 10.4\%$
Total	415	$\pm 4.8\%$

WINTER SURVEY

The winter survey was conducted with 100 Valdez visitors between February and April. As traffic figures show, Valdez receives comparatively few visitors in the winter months. By necessity, the sample was designed to capture visitors at high-density locations and events: Thompson Pass pullouts, the airport during heli-skiing season, and the ice climbing festival. (Note: Most of the festival respondents filled out the survey online after being emailed a link following the festival.)

Recognizing that ice climbers were over-represented in the winter sample, survey responses were examined both unweighted and weighted (using estimated market share for skiers, ice climbers, and other visitors). Weighted data revealed:

- Market characteristics in terms of demographics and travel planning remained very similar between the weighted and unweighted data.
 - Winter visitors remained an average of 35 years old, predominantly Alaskan, and male.
 - Internet usage remained high for travel planning, while use of printed travel planning materials remained low.
- Top winter activities included skiing, snowmachining, visiting friends and relatives, hiking, and ice climbing.

The resulting winter survey data should be considered representative of Valdez' winter visitors market providing valuable information on visitor volume, demographics, travel planning habits, and spending.

SURVEY LIMITATIONS

The Valdez Visitor Market Profile survey methodology mirrored the *Alaska Visitor Statistics Program (AVSP)* in many ways. This statewide exit survey of visitors (conducted by McDowell Group on behalf of the State of Alaska) is fielded as visitors exit Alaska via air, highway, ferry, and cruise ship. However, the methodology had to be adapted to Valdez' unique access, markets, and attractions – particularly around Thompson Pass and the Richardson Highway. Because field staff were not able to block the highway to conduct ratios or intercept visitors as they exited, McDowell Group adapted the fielding techniques for Valdez. Surveys were conducted primarily at RV parks, augmented by fielding efforts at the harbor, airport, and several hotels. To capture visitors that traveled for winter recreation, surveys were conducted during peak months at Thompson Pass augmented by surveys conducted at the airport and with special event participants. Even with these efforts to capture a

representative sample of the market, it is likely that a portion of the market that accessed Valdez by highway and stayed in hotels, private homes, and B&Bs is underrepresented.

Visitor Volume

Visitor volume was estimated based on a wide range of data sources, including:

- Alaska Marine Highway System for ferry traffic
- Alaska Department of Transportation and Public Facilities for highway traffic
- Bureau of Transportation Statistics for Valdez Airport passenger enplanements
- Ravn Air for passenger enplanements and visitor/resident ratios
- Stan Stephens Cruises and Major Marine Tours for cruise passenger traffic
- Princess Cruises for cruise passenger day tour traffic (from Copper River Princess Lodge)

In addition, the study team contacted several hotels and RV parks to contribute to our traffic estimates. These included:

- Best Western
- Mountain Sky
- Eagles Rest RV Park
- Bear Paw RV Park
- Chena RV Park

McDowell Group thanks these agencies and operators for their contribution to the study. Additional information on how visitor volume was estimated is provided in the Visitor Volume chapter.

This chapter presents estimates for the total number of pleasure-related visitors to Valdez over the study period. Business visitors are excluded.

Total Visitor Volume

An estimated 94,000 pleasure-related visitors traveled to Valdez over the 12-month period of October 2015 through September 2016. The vast majority of visitation (92 percent) occurred in the summer months of May through September.

Visitor markets are often described in terms of the mode of transportation visitors use to exit a community. A majority of visitors (82 percent) exited Valdez via highway; 10 percent exited via ferry; and 3 percent exited via air. Five percent were cruise ship passengers who exited Valdez via catamaran or motorcoach/shuttle.

Two-thirds (66 percent) of Valdez pleasure-related visitors were from outside Alaska, while one-third (34 percent) were Alaska residents.

Valdez Pleasure Visitor Volume, By Transportation Mode and Alaska Residency, 2015-16

	Summer 2016	Winter 2015-16	Total 2015-16	% of Total
Highway	72,000	5,000	77,000	82%
Ferry	8,000	1,000	9,000	10%
Cruise	5,000	0	5,000	5%
Air	1,500	1,500	3,000	3%
Total	86,500	7,500	94,000	100%
Out-of-state residents	60,000	2,500	62,500	66%
Alaska residents	26,500	5,000	31,500	34%

Additional detail by transportation mode is provided below.

Visitor Volume by Mode

Highway

An estimated 77,000 pleasure-related visitors exited Valdez via highway, nearly all (94 percent) in the summer months of May through September. Highway traffic estimates were based on Richardson Highway (northbound) traffic data from the Alaska Department of Transportation and Public Facilities and data from the Alaska Visitor Statistics Program (AVSP).

Ferry

An estimated 9,000 visitors departed Valdez by ferry during the study period, with most (87 percent) departing in the summer months. AMHS provided the number of passenger embarkations at Valdez for the October 2015 through September 2016 time period. Because AMHS has stopped requiring that passengers provide their zip

code when purchasing a ticket, ratios of Valdez residents to non-residents from previous data was used, by season, to estimate visitor volume.

Air

An estimated 3,000 visitors to Valdez departed via air during the study period, about half in the summer months, and half in the winter months. These estimates were arrived at based on passenger enplanement data from the US Bureau of Transportation Statistics and Ravn Air. Estimated ratios of Valdez residents to visitors, by month, were provided by Ravn Air. Ratios were applied to enplanement data, by month, to arrive at total visitation numbers.

Cruise

An estimated 5,000 cruise passengers visited Valdez in summer 2016. Cruise passengers visit Valdez through the following means:

- Day tour participants via motorcoach/shuttle from Copper River Princess Lodge
- Pass-through travelers who arrived from Whittier via catamaran in the morning and have 1-2 hours before embarking on motorcoach headed to Copper River, and the opposite route
- Overnight travelers who arrive/depart via catamaran and motorcoach

Major Marine Tours, Stan Stephens Cruises, and Princess Cruises provided passenger counts; exact passenger numbers by transportation mode are confidential.

Visitor Survey Results

This chapter presents results of the visitor survey. Note that visitors traveling for business were screened out of the survey. Also, cruise visitors were not included in the survey sample.

Trip Purpose

- Nearly all summer respondents (98 percent) were traveling for vacation/pleasure purposes, with only 2 percent traveling to visit friends or relatives, and less than 1 percent traveling for business/pleasure.
- Winter respondents also largely traveled for vacation/pleasure purposes (93 percent). Four percent traveled for business/pleasure, and 3 percent were visiting friends/relatives.

Trip Purpose (%)

	Total Visitors n=415	SUMMER Non-Residents n=327	Alaska Residents n=88	WINTER n=100
Vacation/pleasure	98	98	98	93
Visiting friends/ relatives	2	2	2	3
Business/pleasure	<1	-	<1	4

Note: Visitors traveling for business only were screened out of the survey.

Lodging and Length of Stay

- Most summer respondents (82 percent) stayed in a campground or RV while in Valdez. That figure was much higher among Alaska residents (94 percent) compared to non-residents (76 percent). Non-residents showed higher usage of hotels (18 percent, compared to 3 percent of Alaska residents).
- Average length of stay in Valdez was four nights among all respondents, four nights among non-Alaska residents, and three nights among Alaska residents.
- Winter respondents were most likely to stay in a hotel (49 percent). They reported an average length of stay of six nights.

Lodging and Length of Stay (%)

	Total Visitors n=415	SUMMER Non-Residents n=327	Alaska Residents n=88	WINTER n=100
Campground/RV	82	76	94	9
Hotel	14	18	3	49
Friends/family	3	4	2	22
Wilderness camping	3	3	2	11
B&B	1	1	<1	2
Lodge	<1	<1	-	14
Average # nights in Valdez	4 nights	4 nights	3 nights	6 nights

Activities in Valdez

- The most common activities among summer respondents were camping (66 percent), fishing (44 percent), wildlife viewing (42 percent), and hiking (34 percent).
- Respondents from outside Alaska were more likely to participate in wildlife viewing, day cruises, the hatchery, and sightseeing tours. Alaska residents reported higher participation in camping, fishing, biking, Old Town, and visiting friends/relatives.
- Winter respondents' most common activities were ice climbing, skiing/snowboarding, festival, visiting friends/relatives, and snowmachining.¹

Visitor Activities (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Camping	66	58	84	16
Fishing	44	36	64	2
Unguided	37	28	57	2
Guided	11	12	9	-
Wildlife viewing	42	46	34	8
Hiking	34	31	38	17
Day cruises	31	42	9	1
Shopping	27	26	28	4
Museums	21	21	21	-
Hatchery	17	22	5	-
Birdwatching	16	19	8	2
Sightseeing tours	14	17	7	-
Biking	13	8	23	-
Old Town	11	9	16	4
Kayaking	10	9	12	-
Visiting friends/relatives	9	6	15	26
Glacier trekking	9	9	8	11
Historical/cultural attractions	8	8	9	-
Festival/special event	5	4	7	30
Oil terminal/pipeline	4	5	3	-
Flightseeing	2	2	2	1
Business	2	2	3	1
Hunting	2	1	5	1
Rafting	1	1	<1	-
Ice climbing	-	-	-	54
Skiing/snowboarding	<1	-	1	50
Unguided	<1	-	1	34

¹ This table reflects unweighted results for the winter sample. When the data was weighted to reflect estimated proportions of ice climbers, skiers, and other visitors – leading activities included skiing, snow machining, visiting friends and relatives, and ice climbing.

Guided	-	-	-	20
Snowmachining	-	-	-	21
Crosscountry skiing	-	-	-	10
Other	1	1	<1	8

- Winter respondents who participated in skiing or snowboarding were asked for their level of expertise. The most common level was expert/professional at 44 percent, followed by advanced at 31 percent.

Level of Skiing/Snowboarding Expertise (%)
(Base: Participated in Skiing/Snowboarding)

	WINTER n=52
Novice	6
Intermediate	19
Advanced	31
Expert/professional	44

Satisfaction Ratings

Respondents were asked to rate various aspects of their Valdez visit. Those who responded with “don’t know” or “did not use” were removed from the base.

- Summer respondents expressed a high level of satisfaction with their overall Valdez experience, with 97 percent either satisfied (31 percent) or very satisfied (66 percent). Alaska residents gave higher satisfaction ratings than non-residents (83 versus 58 percent very satisfied).
- The highest-rated satisfaction category among summer respondents was sightseeing, with 71 percent very satisfied, followed by friendliness of residents (69 percent) and tours and activities (68 percent).
- The lowest-rated categories among summer respondents were shopping (33 percent very satisfied), value for the money (36 percent), and restaurants (food and service were each 40 percent very satisfied).
- Very few summer respondents gave dissatisfied ratings, ranging from zero (for sightseeing) to 6 percent (quality of restaurant food).
- Like summer respondents, winter respondents gave high overall satisfaction ratings at 71 percent very satisfied and 27 percent satisfied.
- Winter respondents gave their highest satisfaction ratings to tours/activities (65 percent very satisfied) and friendliness of residents (64 percent).

Satisfaction with Valdez Trip (%)
(Base: Excludes “don’t know” and “did not use” responses)

	Total Visitors	SUMMER Non- Residents	Alaska Residents	WINTER
Overall Valdez Experience	n=409	n=323	n=86	n=100
Very satisfied	66	58	83	71
Satisfied	31	39	15	27
Neutral	2	3	<1	1
Dissatisfied	1	1	2	1
Very dissatisfied	-	-	-	-

Satisfaction with Valdez Trip (%), Continued
(Base: Excludes “don’t know” and “did not use” responses)

	Total Visitors	SUMMER Non- Residents	Alaska Residents	WINTER
Accommodations	n=397	n=268	n=129	n=91
Very satisfied	59	51	76	37
Satisfied	35	41	23	55
Neutral	4	6	<1	4
Dissatisfied	1	1	-	3
Very dissatisfied	<1	<1	-	-
Restaurants – Food	n=269	n=186	n=83	n=84
Very satisfied	40	39	43	31
Satisfied	44	42	48	46
Neutral	10	11	9	17
Dissatisfied	4	6	<1	5
Very dissatisfied	2	2	-	1
Restaurants – Service	n=264	n=183	n=81	n=85
Very satisfied	40	40	41	38
Satisfied	44	43	47	40
Neutral	12	11	12	14
Dissatisfied	4	5	-	8
Very dissatisfied	-	-	-	-
Shopping	n=223	n=171	n=52	n=45
Very satisfied	33	29	40	24
Satisfied	47	48	45	42
Neutral	18	20	14	27
Dissatisfied	1	2	-	4
Very dissatisfied	1	1	-	2
Visitor Information Services	n=160	n=129	n=31	n=32
Very satisfied	59	56	67	31
Satisfied	32	31	33	25
Neutral	7	10	-	41
Dissatisfied	1	2	-	3
Very dissatisfied	-	-	-	-
Sightseeing	n=339	n=277	n=62	n=58
Very satisfied	71	71	72	62
Satisfied	26	26	28	34
Neutral	2	3	-	3
Dissatisfied	-	-	-	-
Very dissatisfied	-	-	-	-

Satisfaction with Valdez Trip (%), Continued
(Base: Excludes “don’t know” and “did not use” responses)

	Total Visitors	SUMMER Non- Residents	Alaska Residents	WINTER
Tours and Activities	n=245	n=171	n=88	n=48
Very satisfied	68	70	63	65
Satisfied	30	26	37	23
Neutral	3	4	<1	10
Dissatisfied	-	-	-	2
Very dissatisfied	<1	<1	-	-
Wildlife Viewing	n=330	n=262	n=68	n=50
Very satisfied	56	51	68	46
Satisfied	36	40	25	36
Neutral	7	7	8	18
Dissatisfied	1	1	-	-
Very dissatisfied	-	-	-	-
Friendliness of Residents	n=361	n=280	n=81	n=96
Very satisfied	69	66	74	64
Satisfied	28	32	21	30
Neutral	3	1	5	6
Dissatisfied	1	1	-	-
Very dissatisfied	-	-	-	-
Value for the Money	n=366	n=283	n=83	n=96
Very satisfied	36	29	50	31
Satisfied	42	46	34	51
Neutral	17	19	13	11
Dissatisfied	3	4	2	5
Very dissatisfied	1	2	-	1

Trip Planning

- About half of summer respondents said they used the internet to plan or book their Valdez trip, including 54 percent of non-Alaska residents and 48 percent of Alaska residents.
- Winter respondents were more likely to have used the internet at 70 percent.

Used Internet/Apps to Plan or Book Valdez Area Trip (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Used internet	52	54	48	70
Did not use internet	47	45	50	28
Don't know	1	<1	2	2

Respondents who used the internet were shown a list of websites and apps and asked which of the sites they had used to plan their trip, and which were used to book their trip.

- Among summer visitors, Google was by far the most popular website for trip planning, mentioned by half of respondents. Other sites mentioned by at least 10 percent of respondent included ValdezAlaska.org, AMHS, and TripAdvisor.
- Rates of using each site for booking purposes were much lower. The most commonly cited were Google at 22 percent, AMHS at 8 percent, and ValdezAlaska.org at 5 percent.
- Winter visitors most commonly cited Google as a planning tool (37 percent), followed by Facebook (28 percent) and TripAdvisor (15 percent).

**Websites/Apps Used to Plan or Book Valdez Area Trip (% Planned / % Booked)
(Base: Used Internet)**

	Total Visitors n=224	SUMMER Non- Residents n=159	Alaska Residents n=65	WINTER n=75
Google	51 / 22	52 / 24	50 / 17	37 / 19
ValdezAlaska.org	12 / 5	8 / 3	22 / 8	-
AMHS	10 / 8	10 / 10	11 / 2	4 / -
Trip Advisor	10 / 4	11 / 4	7 / 4	15 / 6
Travelalaska.com	9 / 3	12 / 2	<1 / 5	-
Facebook	6 / 3	8 / 4	2 / -	28 / 6
Alaska App	4 / 2	5 / 2	<1 / -	-
Instagram	3 / 1	2 / 2	7 / -	7 / -
Yelp	3 / 1	1 / -	7 / 4	4 / -
Booking.com	2 / 3	3 / 4	-	-
AAA.com	1 / 1	2 / 2	-	-
Airline websites	1 / 3	1 / 4	-	5 / 4
Hotel/lodging websites	1 / 1	<1 / <1	3 / 2	7 / 9
Travelocity	1 / 2	1 / 3	<1 / <1	3 / 4
Expedia	<1 / 1	1 / 2	- / <1	4 / 4
Kayak.com	<1 / 1	<1 / 1	- / <1	3 / 4
LonelyPlanet.com	<1 / <1	<1 / <1	-	-
AirBnB	<1 / <1	<1 / <1	<1 / -	5 / -
Hotels.com	<1 / <1	<1 / <1	-	4 / 2
HotelTonight	<1 / <1	<1 / <1	-	-
Orbitz	<1 / <1	<1 / <1	-	3 / -
Other	14 / 7	14 / 10	14 / -	24 / 19
Don't know/none	16 / 51	16 / 45	16 / 66	23 / 30

- Just 7 percent of summer respondents and 5 percent of winter respondents used a travel agent in booking their Valdez trip. (See table, next page.)

Used Travel Agent to Book Portion of Valdez Trip

	Total Visitors n=415	SUMMER Non-Residents n=327	Alaska Residents n=88	WINTER n=100
Used travel agent	7	10	<1	5
Did not use travel agent	90	88	96	93
Don't know	3	2	4	2

After being asked about internet and travel agent usage, respondents were asked what additional sources they used to plan their Valdez trip, before their trip.

- The most common sources cited by summer respondents were brochures and prior experience (both at 28 percent), followed by the Milepost (26 percent), and friend/family/co-workers (25 percent).
- Non-Alaska residents were much more likely to cite brochures (38 percent versus 4 percent of residents), Milepost (34 versus 10 percent), other travel guides/books (19 versus 4 percent), and the North to Alaska guide (19 versus <1 percent), among others. Alaska residents were much more likely to cite prior experience (54 versus 15 percent). They were also twice as likely to say they didn't use any sources to plan (20 versus 10 percent).
- Winter visitors most commonly cited friends/family/co-workers (47 percent) and prior experience (32 percent).

Additional Sources Used to Plan Valdez Trip, Before Trip (Besides Internet and Travel Agent) (%)

	Total Visitors n=415	SUMMER Non-Residents n=327	Alaska Residents n=88	WINTER n=100
Brochures	28	38	4	2
Prior experience	28	15	54	32
Milepost	26	34	10	2
Friends/family/co-workers	25	22	31	47
Other travel guides/books	14	19	4	3
North To Alaska guide	9	13	<1	1
Magazine/newspaper/TV	9	11	2	2
Valdez Visitor's Guide	8	10	2	-
Valdez Convention & Visitors Bureau	7	8	3	-
AAA	4	5	2	-
Tour company	3	4	<1	3
Ferry brochure/schedule	2	2	1	2
Hotel/lodge/B&B	1	1	<1	3
Other	3	4	2	9
None	13	10	20	26
Don't know	3	2	4	2

Respondents were also asked what sources of information they used while in Valdez.

- The most commonly cited sources used while in Valdez among summer visitors were brochures (33 percent), local residents (32 percent), and RV park offices (24 percent).²
- Non-Alaska residents were much more likely to cite brochures (41 percent versus 16 percent of Alaska residents), the VCVB (15 versus 5 percent), and hotel/lodge/campground (14 versus 6 percent), among others.
- Alaska residents were much more likely to respond that they consulted no sources while in Valdez (33 versus 18 percent).
- Winter respondents most commonly cited local residents (44 percent) and cell phone apps (23 percent). One-third said they consulted no sources while in Valdez.

Sources of Information While in Valdez (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Brochures	33	41	16	7
Local residents	32	32	31	44
RV park office	24	26	20	-
Valdez Visitor's Guide	13	14	11	3
VCVB	12	15	5	2
Hotel/lodge/campground	11	14	6	8
Cell phone apps	9	9	9	23
Tour guides	7	10	-	5
Reservation office	6	6	7	-
Ferry terminal	5	7	1	3
Forest Service office	<1	<1	-	1
Other	2	1	4	4
None	23	18	33	33
Don't know	2	1	5	3

²² Brochures include community and regional visitor guides and rack cards.

Visitor Spending

Respondents were asked a series of questions about their party's spending on their Valdez trip.

- Summer respondents reported spending an average of \$307 per person on their Valdez trip. The category accounting for the most spending was tours/activities/entertainment at \$105, followed by lodging at \$78 and food/beverage at \$62.
- Average spending was higher among non-residents at \$327, compared to \$271 among Alaska residents. Non-residents reported higher spending in every category with the exception of tours/activities/entertainment.
- Winter visitors reported a higher-per person average compared with summer visitors at \$723 per person. Food/beverage spending was the biggest category at \$214, followed by tours/activities/entertainment at \$208.
- In a separate question, heli-skiers were asked the price of their trip package. The average package price was \$7,600 per person.

Average Per-Person Spending in Valdez

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Lodging	\$78	\$81	\$73	\$98
Tours/activities/ entertainment	\$105	\$101	\$112	\$208
Gifts/souvenirs/clothing	\$18	\$21	\$13	\$107
Food/beverage	\$62	\$71	\$44	\$214
Rental cars/fuel/ transportation	\$31	\$34	\$26	\$69
Festival registration (winter only)	-	-	-	\$20
Other	\$13	\$19	\$3	\$7
Total	\$307	\$327	\$271	\$723

Notes: Sample sizes differ for each category, ranging between 221 and 320 for summer and 30 and 70 for winter, depending on "don't know" responses.

Demographics

- Over two-thirds of summer respondents (69 percent) were from outside Alaska. Among winter respondents, that percentage was 39 percent.

Visitor Origin (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Outside Alaska	69	100	-	39
Alaska	31	-	100	61

- Alaska residents were most likely to be from Fairbanks (40 percent), followed by Anchorage/Eagle River (24 percent), and Palmer/Wasilla (19 percent).
- Winter resident respondents were most likely to be from Anchorage/Eagle River (63 percent).

Alaska Visitor Origin (%)

	SUMMER n=88	WINTER n=63
Fairbanks	40	16
Anchorage/Eagle River	24	63
Palmer/Wasilla	19	5
Delta Junction	5	-
Girdwood	4	10
Kenai/Soldotna	3	-
Juneau	3	-
Other	2	6

- Among summer respondents, 71 percent were from the US. The most common US regions of origin were the Midwest (25 percent) and the West (20 percent).
- Among international respondents (29 percent of non-Alaska visitors), the most common countries of origin were Switzerland (7 percent), Germany (6 percent), and Canada (5 percent).
- Nearly two-thirds (63 percent) of winter (non-Alaska) respondents were from the US, most commonly the West (49 percent). Of the international respondents (37 percent), the most common country of origin was Switzerland (7 percent).

Outside Alaska Visitor Origin (%)

	SUMMER n=279	WINTER n=41
US	71	63
Midwestern US	25	10
Western US	20	49
Southern US	19	2
Eastern US	8	2
International	29	37
Switzerland	7	7
Germany	6	-
Canada	5	5
Australia	2	5
UK	1	5
China	1	2
Spain	1	-
Israel	1	-
France	1	-
Italy	1	-
Netherlands	1	-
New Zealand	-	2
Austria	<1	2
Brazil	-	2
Norway	-	2
Other	3	-

Respondents were asked to provide the gender and age of themselves and others in their party. The figures below represent everyone in the travel party.

- Summer visitors were fairly evenly split between males (52 percent) and females (48 percent).
- The average age of summer visitors was 52 years, including 56 years among non-Alaska visitors and 44 years among Alaska residents.

Respondents were also asked whether they had children in their household (not necessarily in their traveling party) and whether they themselves were retired or semi-retired.

- Nearly one-quarter (23 percent) of summer respondents reported children in their household. This percentage was much higher among Alaska residents (52 percent, compared to 10 percent of non-Alaska residents).
- Nearly one-half (48 percent) of summer respondents were retired or semi-retired, including 10 percent of non-Alaska residents and 28 percent of Alaska residents.

Gender, Age, and Retirement Status (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=104
Gender (Combined)				
Male	52	54	50	68
Female	48	46	50	32
Age (Combined)				
Under 18	9	3	19	-
18-24	3	3	3	10
25-34	11	10	14	55
35-44	12	7	19	15
45-54	12	9	16	10
55-64	23	29	14	7
65 and older	29	38	15	3
Average age	52 yrs	56 yrs	44 yrs	35 yrs
Children in household	23	10	52	12
Retired/Semi-retired	48	58	28	4

- Average party size of summer respondents was 2.6 people, including 2.4 percent among non-Alaska residents and 3.1 people among Alaska residents. Party size was defined as those with whom the respondent was sharing travel expenses.
- Respondents were also asked for their group size, which was the number of friends/relatives the respondent was traveling with, regardless of travel expenses. Average group size was 4.4 people, and was consistent among both Alaska residents and non-Alaska residents.

Party and Group Size (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=104
Party Size (Sharing Expenses)				
1 person	11	10	11	26
2 people	59	70	33	41
3 people	11	5	25	12
4 people	9	6	15	9
5 people	5	3	9	5
6+ people	6	5	7	8
Average party size	2.6 people	2.4 people	3.1 people	2.6 people
Group Size				
1 person	7	7	6	15
2 people	50	61	28	36
3 people	11	5	23	13
4 people	12	11	15	10
5 people	6	4	10	4
6+ people	15	13	18	23
Average group size	4.4 people	4.4 people	4.4 people	3.8 people

- A majority of summer visitors (53 percent) had attained at least a bachelor's degree, including 24 percent who had attained a higher degree.
- Winter respondents reported a higher rate of achieving a bachelor's or higher, at 69 percent.
- Summer respondents reported an average income of \$106,000, with non-residents and residents reporting similar averages (\$104,000 and \$110,000, respectively).
- Winter respondents reported an average income of \$97,000.

Education and Household Income (%)

	Total Visitors n=415	SUMMER Non- Residents n=327	Alaska Residents n=88	WINTER n=100
Highest Education Attained				
Grade 11 or less	1	2	-	-
High school graduate/GED	18	18	20	4
Associate/technical degree	8	8	9	5
Some college	13	11	19	19
Graduated from college	29	27	33	37
Masters/Doctorate	24	28	17	32
Don't know	2	2	-	-
Declined	4	5	2	4
Household Income				
Less than \$25,000	2	2	1	9
\$25,001-\$50,000	6	7	6	16
\$50,001-\$75,000	16	16	18	14
\$75,001-\$100,000	17	16	18	16
\$100,001-\$125,000	12	10	16	9
\$125,001-\$150,000	9	8	12	3
\$150,001-\$200,000	7	6	8	4
More than \$200,000	7	6	7	13
Average income	\$106,000	\$104,000	\$110,000	\$97,000
Don't know	4	5	2	8
Declined	20	23	13	8

Trip Planning by Gender and Age, Summer Visitors

Used Internet/Apps to Plan or Book Valdez Area Trip (%)

	AGE			GENDER	
	18-34 yrs n=58	35-54 yrs n=102	55+ yrs n=234	Male n=274	Female n=138
Used internet	57	54	52	50	57
Did not use internet	43	46	48	49	43
Don't know	-	-	<1	1	<1

Websites/Apps Used to Plan Valdez Area Trip (Top 10)
(Base: Used Internet) (%)

	AGE			GENDER	
	18-34 yrs n=36	35-54 yrs n=66	55+ yrs n=134	Male n=158	Female n=85
Google	33	63	55	49	54
AMHS	20	7	8	8	14
Trip Advisor	11	6	11	8	13
Yelp	10	4	-	2	5
Valdez.org	7	18	11	13	9
Travelalaska.com	7	9	10	6	13
Instagram	5	8	<1	3	3
Facebook	5	7	6	8	3
Alaska App	-	<1	6	2	6
Booking.com	-	1	4	3	1

Additional Sources Used to Plan Valdez Trip,
Before Trip (Top 10, Besides Internet and Travel Agent) (%)

	AGE			GENDER	
	18-34 yrs n=58	35-54 yrs n=101	55+ yrs n=234	Male n=274	Female n=137
Brochures	15	18	36	24	34
Prior experience	28	33	23	30	23
Milepost	15	18	33	27	26
Friends/family/ co-workers	33	26	22	23	28
Other travel guides/ books	17	6	17	13	15
North to Alaska guide	-	5	14	7	12
Magazine/newspaper/ TV	10	6	10	5	15
Valdez Visitor's Guide	8	5	9	4	14
Valdez CVB	2	9	7	5	9
AAA	<1	7	4	4	4

Comparative Satisfaction Ratings

- The table on the following page was provided in response to community members' request for context for satisfaction ratings in this study. The data is summarized from AVSP VI, conducted by McDowell Group in 2011 on behalf of the State of Alaska.
- Discussion is provided in the Executive Summary.

AVSP VI, Satisfaction Ratings Southcentral Communities (%), Summer 2011

	All Visitors		South-central		Anchorage		Seward		Whittier		Talkeetna	
Value for the money, compared to other destinations												
Much better	13		12		11		12		10		12	
Better	24		24		24		22		25		21	
About the same	50		48		48		49		49		49	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska	71	4.7	72	4.7	72	4.7	75	4.7	71	4.7	74	4.7
Friendliness of residents	69	4.6	69	4.6	69	4.6	72	4.7	68	4.6	71	4.7
Sightseeing	67	4.6	69	4.7	69	4.7	71	4.7	69	4.7	73	4.7
Tours and activities	63	4.6	64	4.6	64	4.6	66	4.6	60	4.5	66	4.6
Wildlife viewing	55	4.4	57	4.4	57	4.4	60	4.5	54	4.3	58	4.4
Accommodations	53	4.4	50	4.4	49	4.4	48	4.4	51	4.4	47	4.4
Visitor info. services	52	4.4	53	4.4	53	4.4	55	4.4	50	4.4	56	4.5
Transportation within Alaska	47	4.4	50	4.4	50	4.4	54	4.4	53	4.5	57	4.5
Restaurants	37	4.2	37	4.2	37	4.2	34	4.1	36	4.2	36	4.2
Value for the money	32	4.0	29	4.0	29	4.0	28	3.9	28	4.0	28	3.9
Shopping	29	4.0	29	4.0	29	4.0	31	4.0	29	4.0	31	4.0
Very likely to recommend Alaska	78		77		77		78		79		78	
Very likely to return to Alaska in next five years	38		42		43		35		31		29	
			Kenai/Soldotna		Homer		Palmer/Wasilla		Girdwood		Valdez	
Value for the money, compared to other destinations												
Much better			12		11		12		12		10	
Better			23		22		23		22		22	
About the same			47		46		46		48		45	
Percent "very satisfied" and average (Scale: 1 = very dissatisfied, 5 = very satisfied)												
Overall exper. in Alaska			72	4.7	72	4.7	74	4.7	73	4.7	73	4.7
Sightseeing			71	4.7	69	4.7	72	4.7	75	4.7	69	4.7
Friendliness of residents			65	4.6	68	4.6	68	4.6	65	4.6	64	4.6
Tours and activities			63	4.5	61	4.5	64	4.6	63	4.6	57	4.5
Wildlife viewing			59	4.5	59	4.5	60	4.5	60	4.5	65	4.6
Visitor info. services			51	4.4	55	4.5	58	4.5	53	4.4	53	4.5
Accommodations			48	4.4	46	4.3	47	4.3	47	4.3	33	4.2
Transportation within Alaska			44	4.3	44	4.3	47	4.3	51	4.3	44	4.3
Restaurants			33	4.1	33	4.1	36	4.2	40	4.2	22	4.0
Value for the money			26	3.9	29	3.9	30	3.9	25	3.8	25	3.8
Shopping			23	3.9	27	4.0	31	4.1	26	4.0	21	3.9
Very likely to recommend Alaska			76		79		78		77		74	
Very likely to return to Alaska in next five years			52		47		52		50		41	