



Valdez Visitor Market Profile 2016



Prepared for:
City of Valdez
February 1, 2017

McDowell Group

- Multidisciplinary research and consulting firm since 1972
- 17 professional staff; offices in Anchorage and Juneau
- Tourism clients include:
 - State/Federal agencies (DCCED, AMHS, Alaska Railroad, NPS)
 - DMOs and municipalities (Anchorage, Fairbanks, Juneau, Ketchikan, Sitka, Kodiak, Haines, Valdez, Kenai, Mat-Su)
 - Native Corporations (Huna Totem, Shee Atika, Goldbelt, Ahtna, Sealaska)
 - Cruise lines (Princess, Holland America, Royal Caribbean, small cruise lines)
 - Industry associations (ATIA, CLIA-Alaska, SEATrails, sportfishing assn.)
 - Other private companies (hotels, tours, attractions)



Presentation Outline

- Methodology
- Visitor Volume
- Activities
- Satisfaction
- Trip Planning
- Spending
- Demographics
- Questions



Methodology

- Total visitor surveys: 515
- Winter survey: 100
 - February-April
 - Sites: Thompson Pass pullouts, airport, online with festival participants
- Summer survey: 415
 - May-September
 - Sites: RV parks, AMHS terminal, hotels, harbor, airport
- Survey conducted at/near end of trip
- Business-only visitors screened out; cruise passengers not surveyed



Methodology (cont'd)

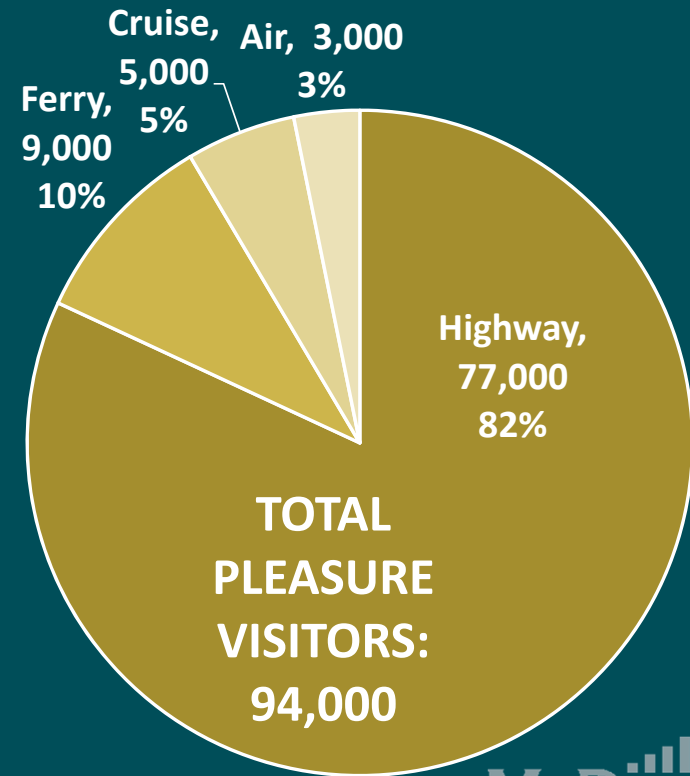
- Summer survey data presented in terms of non-Alaska residents vs. residents reflecting marketing approach
- Survey limitations
- Traffic data collection
 - AMHS passenger traffic
 - ADOTPF for highway traffic
 - Bureau of Transportation Statistics for air passenger traffic
 - Ravn Air for air passenger traffic and visitor/resident composition
 - Stan Stephens Cruises and Major Marine Tours for cruise passenger traffic
 - Princess Cruises for day tour traffic
- Interviews with Valdez hotels and RV parks

Visitor Volume



Visitor Volume, 2015-16

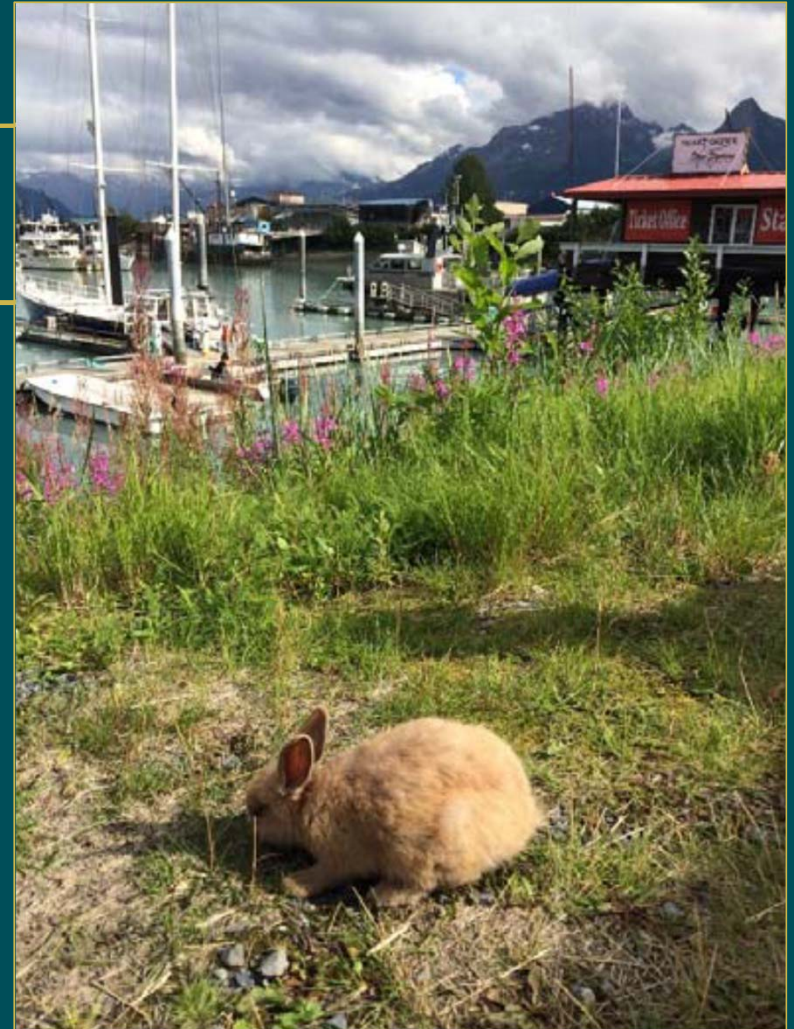
- Total pleasure-related visitor volume 2015-16 (October-September): 94,000
- Visitors counted on departure
- Cruise passengers include:
 - Day tour participants via bus/shuttle from Copper River Princess Lodge
 - Pass-through and overnight travelers arriving/ departing by catamaran and bus/shuttle



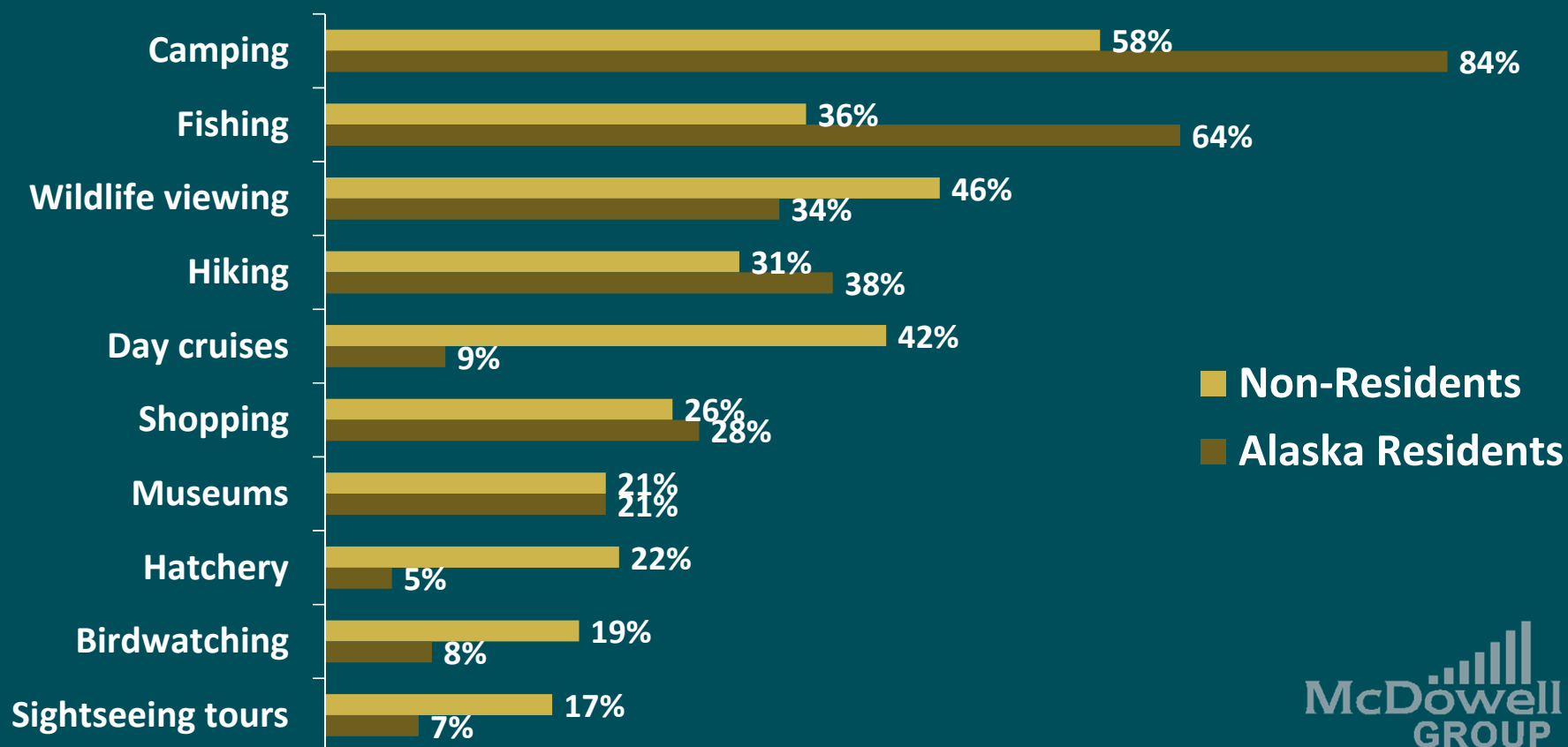
Visitor Volume, By Mode/Season

| | 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% |

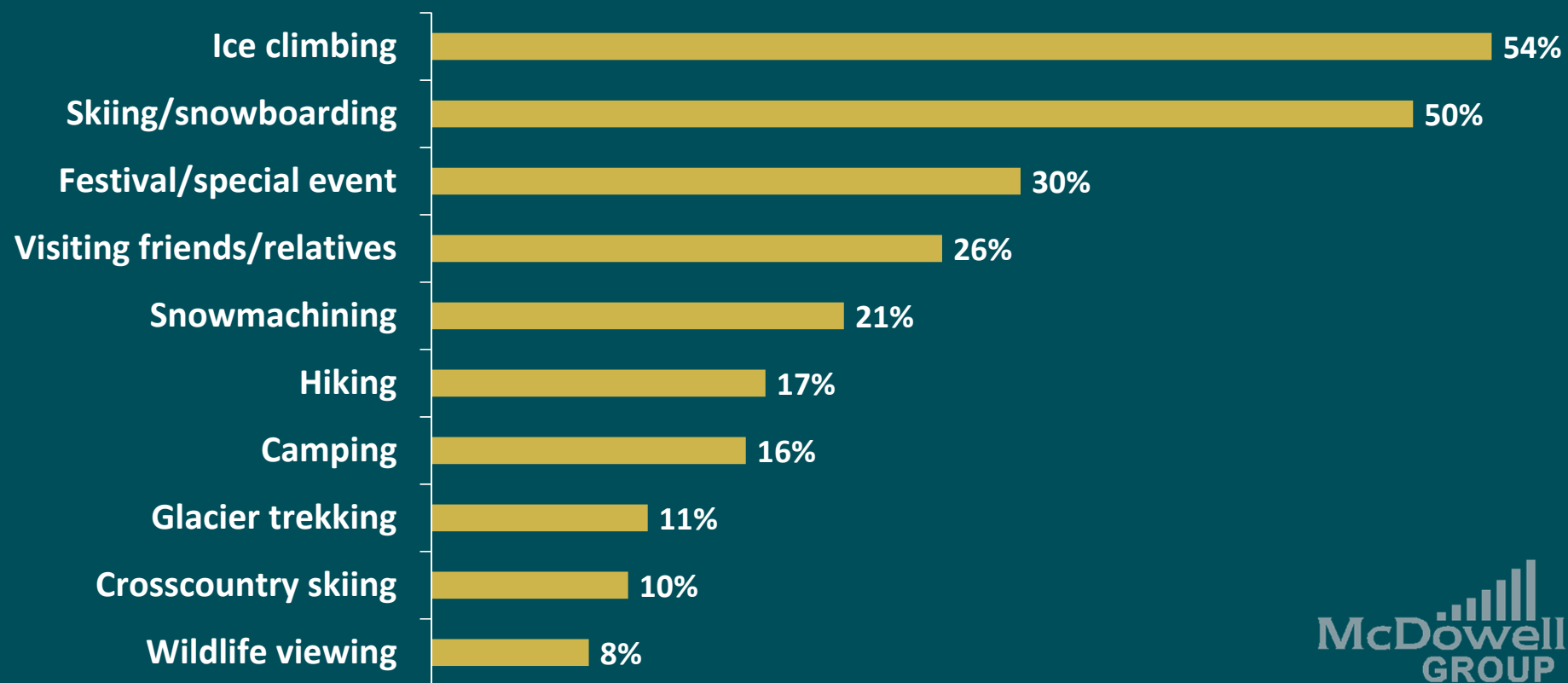
Survey Results



Summer Visitor Activities, Top 10

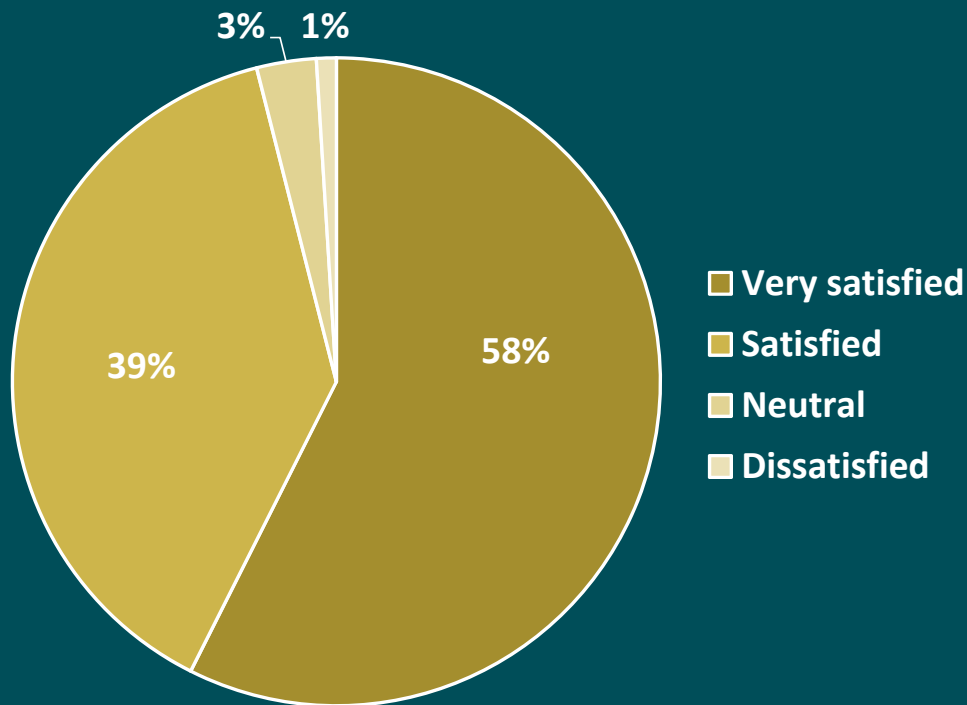


Winter Visitor Activities, Top 10

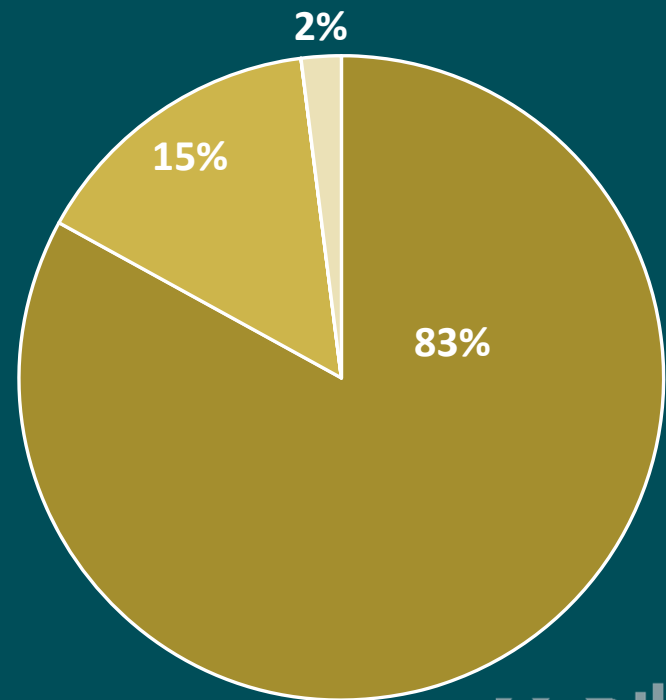


Summer Visitor Satisfaction, Overall Valdez Experience

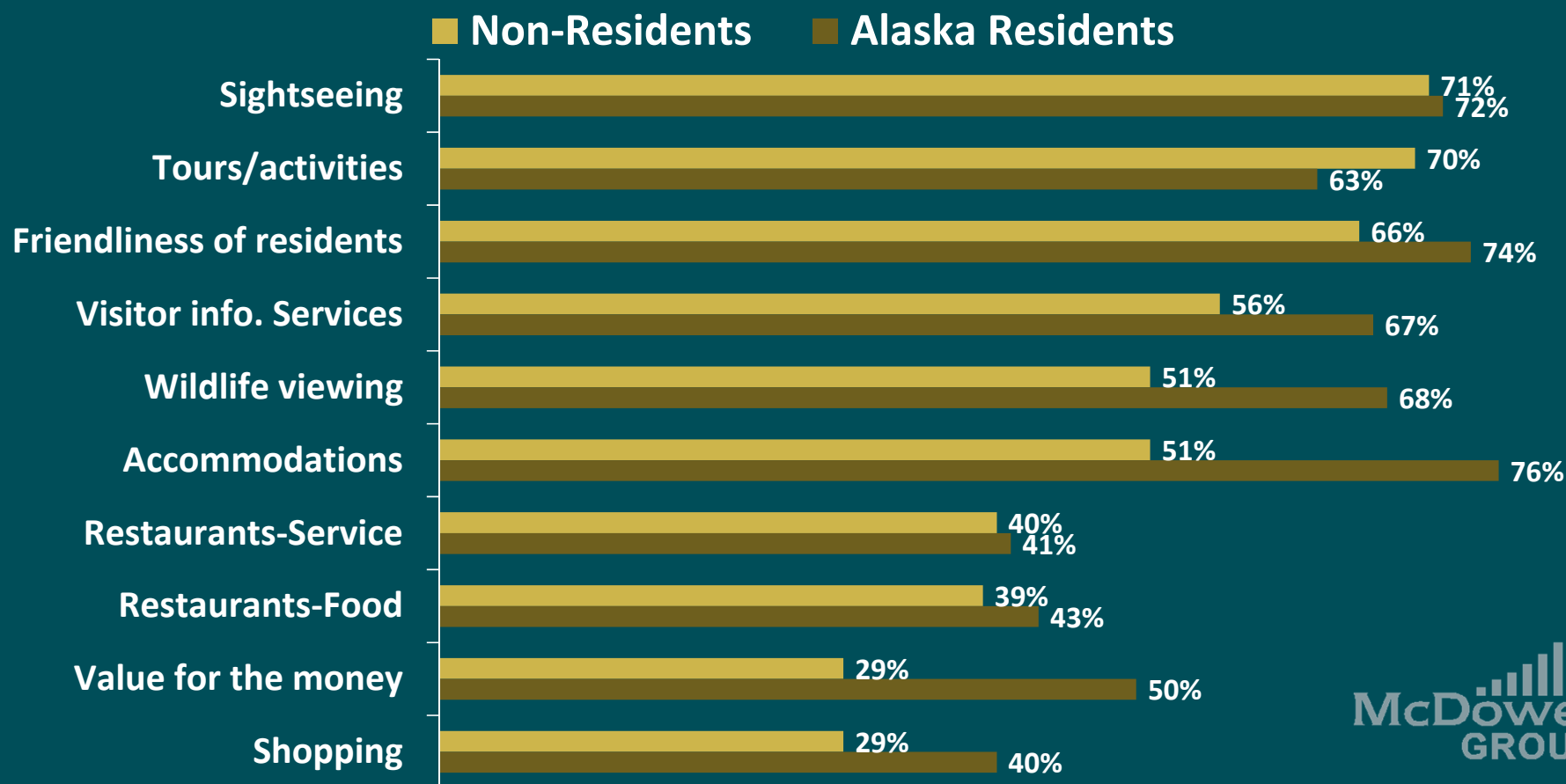
Non-Alaska Residents



Alaska Residents

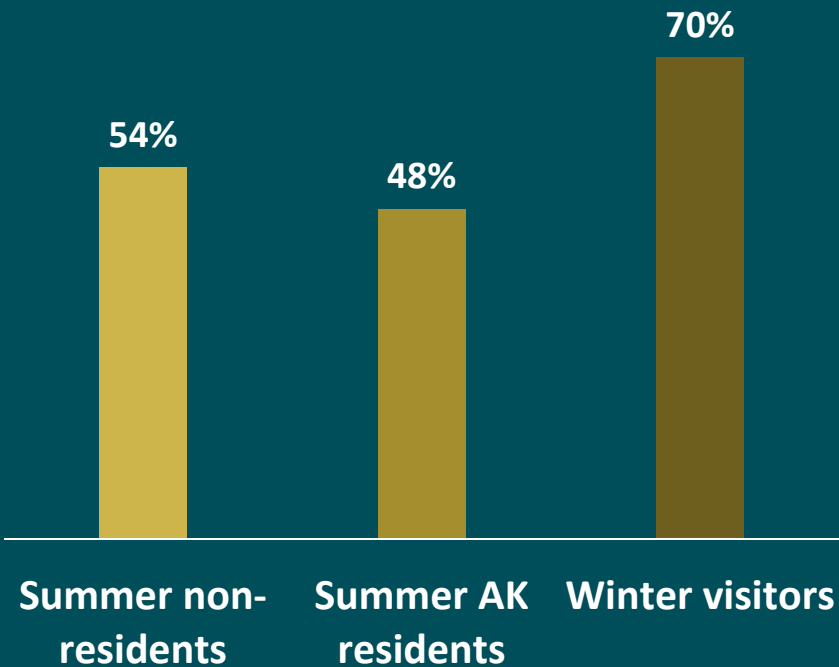


Summer Visitor Satisfaction, % Very Satisfied



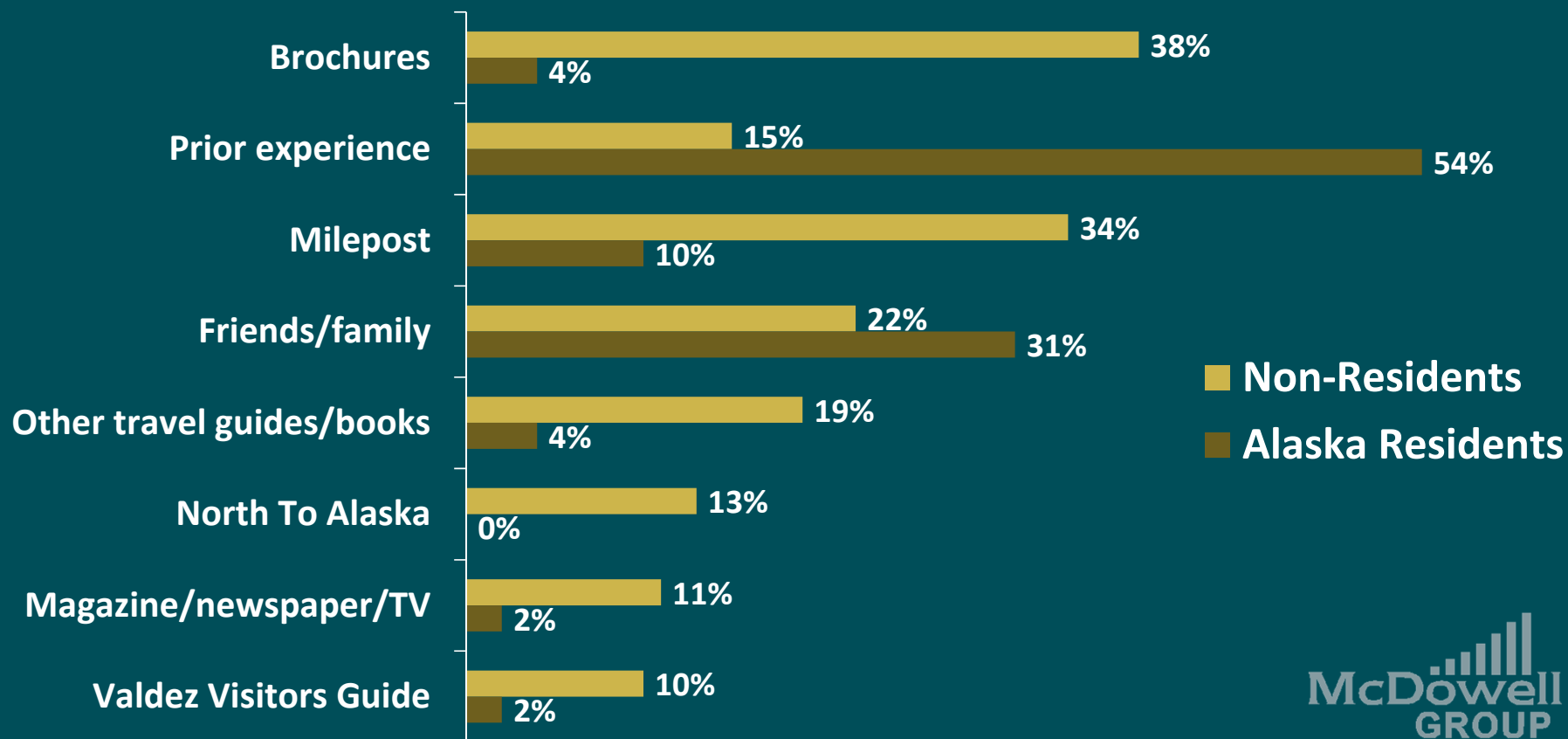
Internet Usage

% Used Internet to Plan Valdez Trip



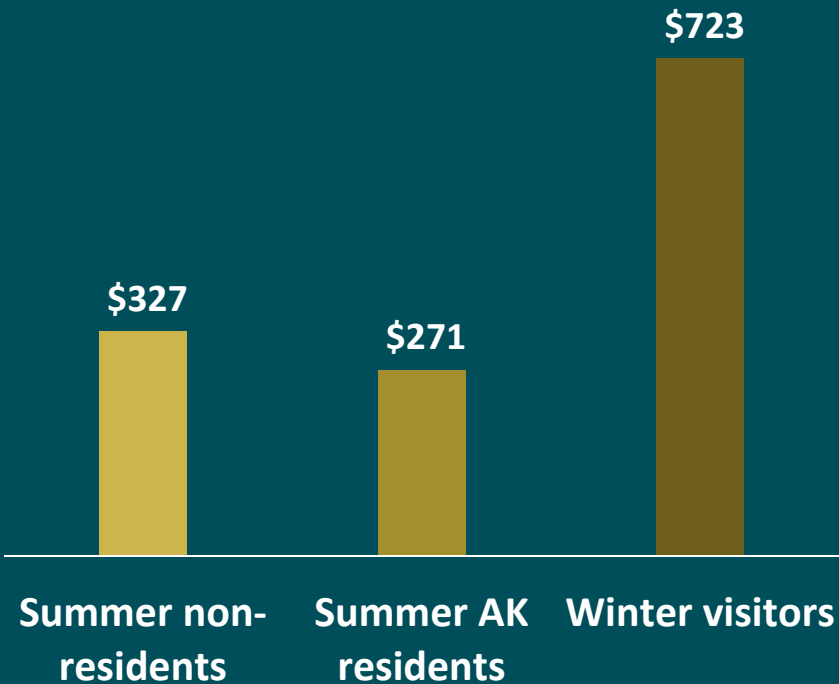
- Most commonly used sites/apps among summer visitors:
 - Google
 - ValdezAlaska.org
 - AMHS
 - TripAdvisor
 - TravelAlaska.com
- Most commonly used sites/apps among winter visitors:
 - Google
 - Facebook
 - TripAdvisor

Summer Visitor Add'l Planning Sources (most common)



Visitor Spending

Average Per-Person Spending in Valdez

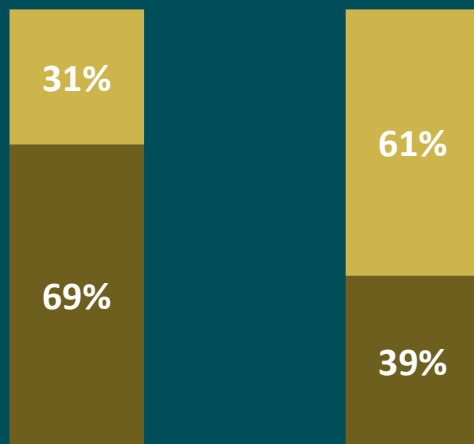


- Tours/activities
 - \$101 Non-residents
 - \$112 Alaska residents
 - \$208 Winter visitors
- Lodging
 - \$81 Non-residents
 - \$73 Alaska residents
 - \$208 Winter visitors
- Food/beverage
 - \$71 Non-residents
 - \$44 Alaska residents
 - \$214 Winter visitors

Visitor Origin

In-State vs. Outside

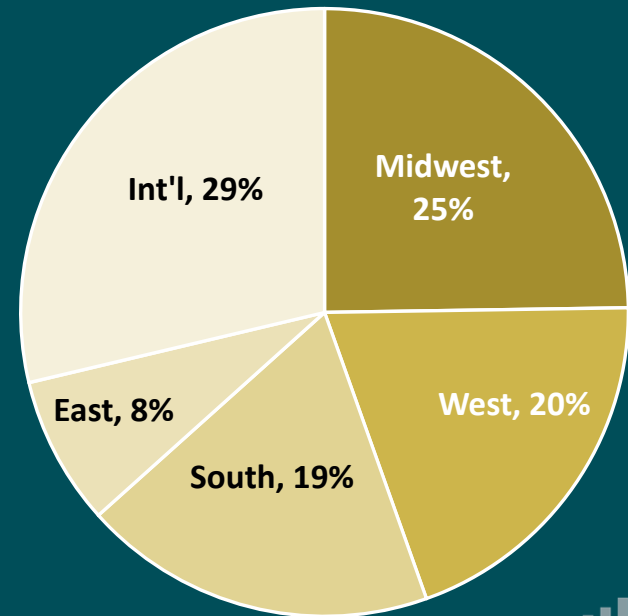
■ Outside Alaska ■ Alaska residents



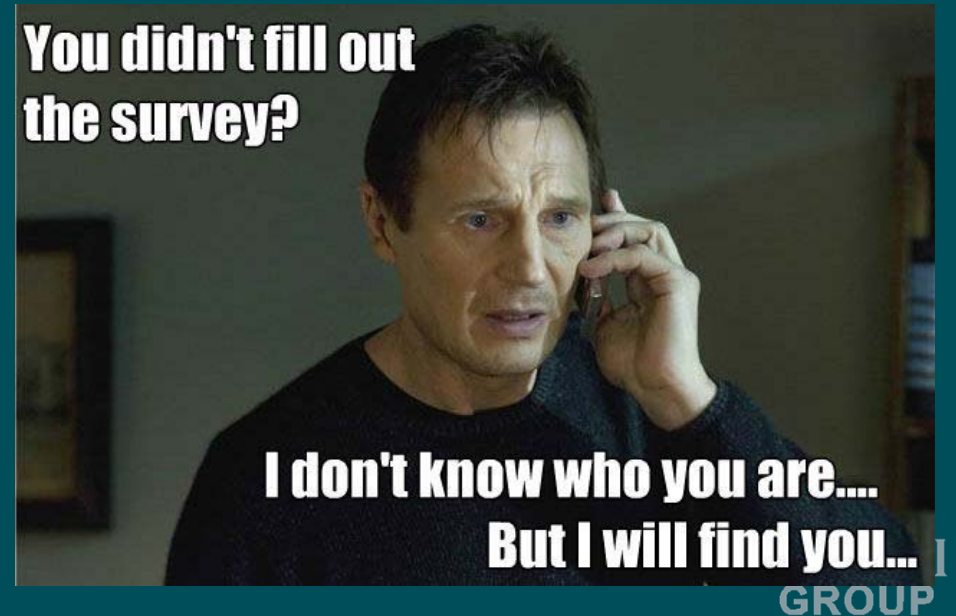
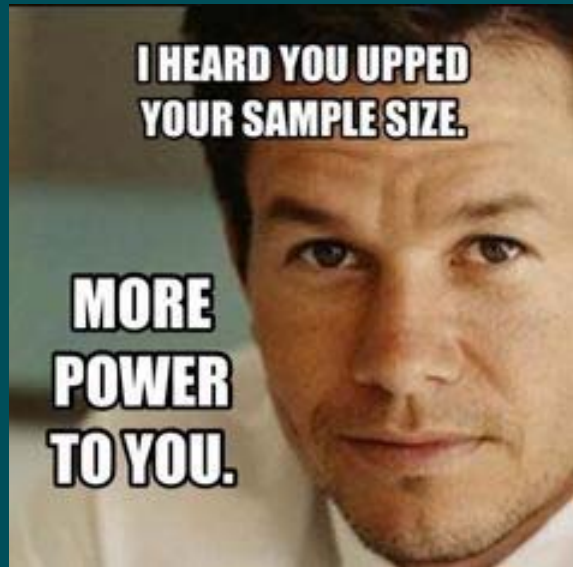
Summer visitors

Winter visitors

Summer Visitor Origin, Outside



Questions





Thank you!

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