MAT-SU CONVETION & VISITORS BUREAU 2020 MAT-SU VALLEY TRAVELER RESEARCH

REPORT OF FINDINGS

December 2020



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Destination Analysts

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RESEARCH OVERVIEW & OBJECTIVES

This report presents the findings of a destination perception and traveler research study conducted by Destination Analysts, Inc. on behalf of the Mat-Su Convention & Visitors Bureau. The primary focus of this research was to support the Mat-Su CVB in identifying and deeply understanding American travelers that represent the most potential for visitation and economic gain to the Mat-Su Valley generally and specifically for the summer of 2021. Another primary objective of this research was to explore destination perceptions of Mat-Su Valley from the perspective of Alaska-oriented leisure travelers.

This research study provides a comprehensive look at high value travelers for Alaska and Mat-Su Valley with the ultimate goal of inspiring incremental visitation to the Mat-Su Valley.

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RESEARCH METHODOLOGY

Survey of Domestic Travelers

Destination Analysts and Mat-Su CVB worked closely together to develop the questionnaire for the Survey of Domestic Travelers. The online survey was then distributed to a nationally representative sample of adult American travelers via global sample provider Dynata/Research Now/Survey Sampling International.

In order to complete the full survey, respondents had to meet the following screening requirements:

- Adults age 18+
- Reside in the U.S. OUTSIDE the state of Alaska
- Taken at least 1 overnight leisure trip in the past two years
- Anticipates taking at least 1 overnight leisure trip in the next 12 months
- Finds the idea of taking a leisure trip to Alaska appealing or neutral

The survey was fielded from October 8 - 13, 2020. In total, 2,000 completed surveys were collected.

The High Potential Summer 2021 Visitor to Mat-Su

- Nearly one-in-five American travelers—who are oriented towards Alaska as a travel destination already—are considered a high potential visitor to Mat-Su valley in the Summer of 2021.
- These high potential summer visitors anticipate taking more overnight leisure trips in the next 12 months compared to the average Alaska-oriented traveler (4.2 vs. 3.5, respectively) providing more opportunity for Mat-Su to convert at least one of these overnight trips to the region. In looking at their ready to travel state-of-mind, the high potential summer visitor is much more likely to say they are already traveling or ready to travel with no hesitations making it an easier sell to get them to book a trip to Mat-Su now, even with the backdrop of COVID-19.
- Demographically, the high potential summer visitor skews male and skews towards younger travelers. They are also more likely than the average Alaska-oriented traveler to have children under the age of 18 in their households and ethnically they are slightly more diverse with almost a quarter identifying as a non-Caucasian ethnicity.
- They are a higher economic impact segment. When asked how much they would spend in-market on their Mat-Su Valley trip, 40.4 percent of high potential summer visitors anticipates spending over \$800 a day—which is inclusive of their lodging, dining, entertainment and in-market transportation. On average though, this audience is likely to spend \$704 per day which is significantly higher than the average Alaska-oriented traveler (\$551/day).





Marketing the Mat-Su Valley Destination Experience

- For the Alaska destination attributes most important to the destination selection process, both high
 potential summer visitors and the typical Alaska-oriented traveler places high importance on
 opportunities to see new things, scenic beauty, affordability, welcoming atmosphere, being in nature
 and wildlife. However, high potential summer visitors are much more likely to also place importance on
 water activities, outdoor activities such as hiking and camping, opportunities for family time and
 opportunities for adventure.
- While scenic beauty, relaxation and affordability are the top components desired from a Mat-Su travel experience, high potential summer visitors are likelier to also seek out adventure and the local food scene. In contrast, the average Alaska-oriented traveler is likelier to seek out unique experiences they can't get elsewhere. In terms of the specific activities they'd most likely engage in on a Mat-Su trip, seeing wildlife, seeing the mountains and experiencing the outdoors top the list for all. However, high potential summer visitors are more likely to say they would also go fish and visit a farm on their trip compared to the average traveler. For their desired place of stay, both audiences are likeliest to seek out 4-star accommodations. However, high potential summer visitors are more likely to stay in a 3-star property compared to the average.





Marketing the Mat-Su Valley Destination Experience

- While lack of knowledge of Mat-Su Valley is the top deterrent across all travelers, it is a more significant impediment to visitation amongst general Alaska-oriented travelers—as high potential summer visitors are much likelier to be familiar with the destination's offerings. Secondarily, perceptions of it being too far away, too expensive to get to and too difficult to reach are also deterring visitation across both groups. This should be addressed in market messaging by showing travelers how to travel to and within the region.
- Additionally, high potential summer visitors are more likely to say they are waiting for a special occasion to visit Alaska. This deterrent is more difficult to overcome because it is so subjective, but in Destination Analysts' Coronavirus *Traveler Sentiment Index Study* those who are in a ready to travel state of mind—which high potential summer travelers mostly are—they are increasingly saying that their motivations to travel in the near term are to "check destinations off their bucket list." This presents a unique opportunity for Mat-Su to demonstrate to travelers that now is the time to make that trip to Alaska, particularly in the Covid-era where Mat-Su offers a pristine outdoors focused trip, free from crowding, with opportunities for adventure and relaxation—which are all highly desired right now.

Deterrents to Visiting the Mat-Su Valley

	Alaska-Oriented Traveler	High Potential Summer '21 Visitor
l don't know much about Mat-Su Valley	46.2 %	29.5%
Too far away	22.5%	21.9%
I don't know where it is	18.2%	9.5%
Too expensive to get to	17.5%	12.4%
Too difficult to reach (not enough flights, too many layovers/flights involved)	15.7%	13.3%
Too remote, rural or wild	11.2%	12.4%
Less interesting than other destinations	10.9%	9.5%
Too cold	10.7%	15.2%
A place I'm waiting for a special occasion (anniversary, retirement, birthday, other milestone)	9.9%	17.1%
I don't have enough vacation time	9.0%	7.6%
Too expensive once I'm there	8.8%	12.4%
Too hard to convince my friends/ family to go on a trip to	7.7%	6.7%
Too much work to plan a trip to	6.4%	10.5%
A place I will visit when I'm older	5.7%	8.6%
Too dangerous	3.9%	5.7%

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Reaching Alaska-Oriented Travelers & High Potential Summer Visitors

- Highlighting the need for a good search marketing and content strategy, half of all Alaskaoriented travelers say they regularly conduct searches on the internet for leisure destination inspiration. This audience also gets inspiration on where to travel from travel review websites and online travel agencies. Additionally, a social strategy will increase Mat-Su Valley's reach as nearly a third of all travelers turn to friends/family through social media and a quarter use social media services to get ideas on where to travel. Social will be even more effective at reaching Mat-Su's high potential summer visitor—with over a third of this segment turning to social channels for destination inspiration.
- In terms of the non-digital channels used for destination inspiration, aside from word-ofmouth from their networks, the top non-digital resources include travel-related TV shows, travel brochures, television programs, travel books and print magazine articles. Additionally, high potential summer visitors are much more likely than the average Alaska-oriented traveler to use film/movies, print advertising and traditional travel agencies as a resource.



MAT-SU VALLEY'S HIGH POTENTIAL SUMMER '21 VISITOR

PROFILE OF THE HIGH POTENTIAL SUMMER VISITOR TO THE MAT-SU VALLEY



IDENTIFYING THE HIGH POTENTIAL SUMMER VISITOR

To identify the high potential summer visitor, we looked at three metrics: appeal of Mat-Su, likelihood to visit the region in 2021 and their likely month of visitation. First, they had to find Mat-Su valley to be appealing for a leisure trip and be likely or very likely to visit the borough in 2021. Those who said they were likely or very likely were asked in which month they would be likely to visit and anyone who said they would visit during the warm season months of May to September were considered a high potential summer visitor.



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IDENTIFYING THE HIGH POTENTIAL SUMMER VISITOR

Nearly one-in-five American travelers—who are oriented towards Alaska as a travel destination already—are considered a high potential visitor to Mat-Su valley in the Summer of 21. Proportion of High Potential Summer Visitors Amongst Alaska-Oriented Travelers



In looking at the number of overnight leisure trips they've taken in the past two years, there is not much difference between the typical American traveler and your high potential summer visitor—both groups averaged just over 6 trips. However, when we look at how many overnight trips they anticipate taking in the next 12 months, the high potential summer visitor plans to travel more, with an average of 4.2 anticipated overnight trips compared to 3.5 for all travelers.

Overnight Leisure Trips Taken (Past 2 Years) Anticipated Overnight Trips in NEXT 12 Months



Total (All Travelers)

High Potential Summer Travelers



4.2

Total (All Travelers) High Potential Summer Travelers

In looking at their ready to travel state-of-mind, the high potential summer visitor is much more likely to say they are already traveling or ready to travel with no hesitations making it an easier sell to get them to book a trip to Mat-Su now, even with the backdrop of COVID-19.

Ready to Travel State-of-Mind



Demographically, the high potential summer visitor skews male and skews towards younger travelers. That is not surprising, given that Destination Analysts' Coronavirus Traveler Sentiment Index Study has shown males and millennials have been much more open to travel and more marketable for travel throughout the pandemic.











■ Total ■ High Potential Summer Visitors

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PROFILE OF THE HIGH POTENTIAL SUMMER VISITOR TO MAT-SU

Although both groups are affluent, the high potential summer visitor has a slightly higher average annual household income. Marital status-wise both groups look similar with about 70% being married or partnered and about a quarter being single. However, high potential summer visitors are more likely to have children under the age of 18 in their households and ethnically they are slightly more diverse with almost a quarter identifying as a non-Caucasian ethnicity.

Annual HHI Total \$105,154 Total 69.2%2.7% 80% (All Travelers) 60% 40% 20% **High Potential** \$108,161 0% **Summer Travelers** Married or partnered Children Under 18 in Household Yes No **High Potential High Potential Summer** 56.2% 43.8% **Summer Visitors** Visitors Total 64.2% 35.8% Total 40% 60% 80% 100% 20%

Marital Status



Ethnicity



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In looking at past visitation rates to Mat-Su Valley, the high potential summer visitor is much likelier to have visited previously, with 43.9% having visited in the last 5 years. In turn, they have much higher levels of familiarity with the destination. In total, 43.0% considers themselves familiar or very familiar with Mat-Su compared to just 21.8% of all Alaska-oriented American travelers.

Past Visitation to The Mat-Su Valley

Familiarity with The Mat-Su Valley





INSPIRING VISITATION TO THE MAT-SU VALLEY, SUMMER 2021



INSPIRING VISITATION TO MAT-SU

We presented a list of Alaska destination attributes and asked how important each is to how they decide which destinations they will visit within the state. The most important attributes are on the far right of this chart with scenic beauty, seeing new things, adventure, welcoming atmosphere, ease of access, chance to getaway, being in nature and affordability topping the list. These particular attributes should be prioritized in your market messaging to increase these travelers' consideration of Mat-Su for a summer trip.

High Potential Summer Visitors: Importance of Destination Attributes to Selecting Alaska Destinations to Visit

(Top 2 Box: % Rating Each as "Important" or "Very Important" to the Destination Decision Process)



INSPIRING VISITATION TO MAT-SU

Amongst high potential summer visitors, Mat-Su performs well for many of the attributes considered most important to selecting destinations within Alaska to visit with the exception of ease of access and affordability. The chart at right maps the importance of each destination attribute tested (denoted by the gray line), against the proportion who considers these same attributes to be good or very good in Mat-Su (denoted by the blue line). Attributes where the blue line is above the gray line shows where Mat-Su performs well, since the volume of travelers who considers this attribute to be good in Mat-Su outpaces the volume who say it is important to their Alaska destination selection process. In contrast, the attributes where the blue line is below the gray line shows where Mat-Su is underperforming in the minds of high potential summer visitors and these attributes are ease of access, affordability and direct flight service. Messaging against these perceived weaknesses should be prioritized to overcome potential barriers to visitation.

High Potential Summer Visitors:

Importance of Destination Attributes to Selecting Alaska Destinations to Visit vs. Mat-Su Valley Rating



DESIRED MAT-SU EXPERIENCES

What experiences should be showcased in the marketing of Mat-Su Valley? First and foremost, scenic beauty should be front and center of all messaging as it is a top desired experience and top attribute considered in the destination selection process.

Additionally, showcasing Mat-Su's opportunities for both adventure and relaxation will be important. This is followed by affordability which reiterates the need to position Mat-Su as a good value. Lastly, the local food scene rounds out the top 5 desired experiences for a Mat-Su Valley trip.

Secondary to these are a safe experience—which is all encompassing, travelers want a destination where they will be safe from a health perspective in this COVID era, and for a destination that needs to combat some perceptions of being too remote showing that Mat-Su is a place where travelers will also be physically safe will be important to inspiring visitation.

Travelers also want unique experiences they can't get elsewhere, which Mat-Su has in spades. Travelers also want a lot to see and do, outdoor recreations, a family friendly atmosphere and they want it to be easy for them to plan a trip there. If the CVB can make the planning process for travelers easier, such as outlining how they can travel to Mat-Su from across the country and providing different itineraries that highlight various trip experiences, it could go a long way in increasing consideration of Mat-Su for a trip this summer.

High Potential Summer Visitors: Desired Mat-Su Valley Experiences



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DESIRED MAT-SU ACTIVITIES

For the specific activities they are most likely to seek out, experiencing the outdoors, taking a day tour, seeing wildlife, seeing the mountains, taking a scenic day drive and dining in local restaurants top the list. There is also significant interest in exploring Alaska native culture, seeing a glacier, seeing the Northern Lights and hiking.

Additionally, nearly three-in-ten high potential summer visitors also said they would go to a new gateway visitor center on their Mat-Su trip.

High Potential Summer Visitors: Desired Mat-Su Valley Activities



DETERRENTS TO VISITING MAT-SU

The top deterrent to visiting Mat-Su amongst this audience is a lack of knowledge about the region, which can be overcome with the CVB's marketing efforts. Secondary to this is the perception that it is just too far away—which can also be addressed in messaging by showing travelers how to travel to and within the region.

Additionally, a notable percent of high potential summer visitors considers a trip to the Mat-Su Valley (and the state) as one they are waiting for a special occasion to take. This deterrent is more difficult to overcome because it is so subjective, but in Destination Analysts' Coronavirus Traveler Sentiment Index Study those who are in a ready to travel state of mind—which your high potential summer travelers mostly are-they are increasingly saying that their motivations to travel in the near term are to "check destinations off their bucket list." This presents a unique opportunity for Mat-Su to demonstrate to travelers that now is the time to make that trip to Alaska, particularly in the Covid-era where Mat-Su offers a pristine outdoors focused trip, free from crowding, with opportunities for adventure and relaxation—which are all highly desired right now.

High Potential Summer Visitors: Deterrents to Visiting Mat-Su Valley



SUMMER 2021 VISITOR TRIP PROFILE



METHOD OF ARRIVAL TO MAT-SU VALLEY

Most high potential summer travelers will likely arrive to the Mat-Su Valley by air. This audience is also likelier to arrive to the area by cruise compared to the typical Alaska-oriented traveler. In total, 36.5 percent of high potential summer visitors say they would arrive to the region by cruise compared to just 28.6 percent of all travelers.

High Potential Summer Visitors: Method of Arrival to Mat-Su Valley



TRAVEL PARTY COMPOSITION

In terms of their travel party composition, most will be traveling with their spouse of significant other, nearly a third will travel with children age 12 or younger and a quarter will travel with friends and/or teenaged children. Comparing back to the average traveler, high potential summer visitors are much more likely to be traveling with children, so depictions of a family friendly environment will again be important in messaging to this audience.

High Potential Summer Visitors: Travel Party Composition



ANTICIPATED DAILY SPENDING IN-MARKET

When asked how much they would spend in-market on their Mat-Su Valley trip, 40.4 percent of high potential summer visitors anticipates spending over \$800 a day—which is inclusive of their lodging, dining, entertainment and in-market transportation. On average though, this audience is likely to spend just over \$700 per day which is significantly higher than the average traveler (\$551/day)—suggesting that Mat-Su Valley's high potential summer '21 visitor is likely to be a higher economic impact segment.

High Potential Summer Visitors: Anticipated Daily Spending In-Market



PLACE OF STAY + LENGTH OF STAY IN MAT-SU

High potential summer visitors are likeliest to seek out 4-star or 5-star hotels for their Mat-Su Valley trip. Compared to the average traveler, this audience is much likelier to say they will stay in a 5-star property which again is evidence that they will be a higher economic impact group. The average length of stay in the region amongst high potential summer visitors is 5.2 days and 4.8 nights.

High Potential Summer Visitors: Anticipated Daily Spending In-Market



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REACHING HIGH POTENTIAL SUMMER 2021 VISITORS





SOURCES OF DESTINATION INSPIRATION: DIGITAL CHANNELS

The digital channels high potential summer visitors most typically use for destination inspiration include travel review websites and online searches, which highlights the need for a good search marketing and content strategy. Additionally, over a third also turn to online travel agencies and social media services—so an effective social strategy is a must, especially for reaching younger travelers who are the most likely to visit next summer. High Potential Summer Visitors: Sources of Destination Inspiration—Digital Channels



SOURCES OF DESTINATION INSPIRATION: NON-DIGITAL CHANNELS

As for non-digital resources, just under a third of high potential summer visitors use travel brochures, word-ofmouth recommendations from their network, travel-related TV shows and other television programs to learn about new destinations to visit for leisure. High Potential Summer Visitors: Sources of Destination Inspiration—Non-Digital Channels



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PRIORITIZING MARKETS FOR SUMMER 2021 VISITATION



PRIORITIZING U.S. MARKETS

As a way to prioritize domestic markets for summer '21 visitation to Mat-Su, Destination Analysts developed a tool that takes into account the size of the marketable audience and their reported average spending per day on a Mat-Su trip plus their average length of stay to estimate the potential impact of each market. Below is a visualization of the market prioritization calculation:



PRIORITIZING U.S. MARKETS (continued)

This table below shows the tool's formula put into practice. This potential marketable audience impact is a relative way to understand the impact of a particular market if every household ended up visiting Mat-Su. Based on the potential impact, DFW, the greater New York metro area, Los Angeles and Washington DC are the markets we recommend prioritizing. This is due to their higher rates of finding Mat-Su appealing and higher likelihoods to visit next year but also because they have higher anticipated in-market spending and longer lengths of stay compared to the other markets.

MSA	*Traveling household	Mat-Su Valley is "Very appealing" for leisure visit	"Very likely" to visit Mat-Su Valley in 2021	Likely to visit Mat-Su in Summer Months of May to September	Marketable audience	Average Spending per day on Mat-Su Valley Trip	Average Nights on Mat- Su Valley Trip	Spending per trip	Potential Marketable Audience Impact
Dallas-Fort Worth, TX	2,204,455	46.7%	36.7%	66.7%	251,471	\$734	4.1	\$3,009	\$756,571,180
New York	5,518,422	29.9%	25.2%	72.1%	299,794	\$617	4.0	\$2 , 491	\$746,689,544
Los Angeles-Long Beach, CA	4,684,043	26.1%	26.1%	67.4%	214,818	\$567	4.2	\$2,372	\$509,456,162
Washington, DC-MD-VA	1,873,571	32.4%	29.4%	61.8%	110,115	\$630	4.6	\$2,871	\$316,167,430
Philadelphia, PA-NJ	2,238,645	27.1%	14.6%	85.4%	75,524	\$586	4.2	\$2,465	\$186,199,551
Atlanta, GA	1,764,988	32.4%	17.6%	67.6%	68,167	\$577	4.0	\$2,291	\$156,141,673
Chicago, IL	2,569,676	21.3%	9.3%	84.0%	42,979	\$548	3.6	\$1,982	\$85,169,687
Detroit, MI	1,282,197	20.9%	7.0%	81.4%	15,240	\$568	3.9	\$2,192	\$33,407,551
Boston, MA	1,877,570	11.1%	5.6%	91.7%	10,624	\$589	4.1	\$2,390	\$25,391,211
Phoenix-Mesa, AZ	1,509,987	19.5%	4.9%	87.8%	12,620	\$430	3.8	\$1,624	\$20,499,351
San Francisco-Oakland, CA	1,731,922	13.5%	5.4%	75.7%	9,574	\$619	3.1	\$1,925	\$18,429,136
Minneapolis-St. Paul, MN- WI	1,305,669	13.9%	5.6%	86.1%	8,675	\$470	3.5	\$1,645	\$14,268,010

DETAILED FINDINGS: THE ALASKA-ORIENTED TRAVELER

(i.e., American Travelers who DO NOT consider the idea of taking a leisure trip to Alaska to be unappealing)
The Alaska Leisure Destination Brand

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APPEAL OF ALASKA

American travelers overwhelmingly consider Alaska to be an appealing place for leisure trips. In total, 71.4 percent considers the state to be appealing or very appealing for leisure visitation, while only one-in-ten (10.4%) considers it to be unappealing.

Appeal of Alaska



Question: How appealing do you find the idea of taking leisure trips (vacations, weekend getaways, etc.) to the state of Alaska? (Select one) Base: All respondents. 2,231 responses.

REASONS FOR FINDING A LEISURE TRIP TO ALASKA UNAPPEALING

American travelers who considers the state to be unappealing most commonly attributed this to their perception that Alaska is too cold. Secondary deterrents to visitation amongst this group include the perception that Alaska is too far, not being interested in the experiences the state offers and the perception that it is too expensive to travel there.

IMPORTANT NOTE: These respondents were then terminated from the survey and the remaining analysis focuses on "Alaska-Oriented Travelers" i.e., American travelers who DO NOT consider a trip to Alaska to be unappealing. **Reasons for Finding a Leisure Trip to Alaska Unappealing**



Question: Why do you consider taking a leisure trip to Alaska to be unappealing? (Select all that apply) Base: Respondents who find leisure trip to Alaska unappealing. 231 responses.

PREVIOUS VISITS TO ALASKA

Amongst Alaska-oriented American travelers, a majority (64.9%) have never visited the state. One-in-five, however, have taken a trip to Alaska within the last five years and 14.7 percent have visited more than five years ago.

Previous Visits to Alaska



Question: Have you visited Alaska before? (Select one) Base: Alaska oriented travelers. 2,000 responses.

NUMBER OF PREVIOUS VISITS TO ALASKA

While half of past visitors have only taken one trip to Alaska previously, the remaining half are repeat visitors. On average, this group has taken 2.4 trips to Alaska before.

Number of Previous Visits to Alaska



Question: How many times have you been to Alaska before? Base: Respondents who visited Alaska before. 703 responses.

FAMILIARITY WITH ALASKA

Although Alaska is largely considered an appealing leisure destination, this audience's familiarity with the state's leisure travel product is only moderate. Just 37.7 percent considers themselves familiar with Alaska and a similar proportion—33.3 percent considers themselves to be unfamiliar.

This is a particularly unique situation for a destination brand, as familiarity typically drives interest and appeal. However, for Mat-Su to grow demand for the region specifically will require educating American travelers about the unique offerings in the borough and demonstrating how the region can deliver on the experiential desires and needs of this audience.

Familiarity with Alaska



Question: How familiar are you with Alaska as a travel destination? (Select one) Base: Alaska oriented travelers. 2,000 responses.

IMPORTANT FACTORS TO SELECTING LEISURE DESTINATIONS IN ALASKA

Alaska-oriented travelers will consider a variety of factors when deciding on specific destinations in within the state to visit, but the most important include the opportunity to see new things, scenic beauty, welcoming atmosphere, affordability and the chance to getaway. Other important considerations for this audience are experiencing nature, easy accessibility, wildlife and the local food scene. Important Factors to Selecting Leisure Destinations in Alaska

(Top-Two Box Score --% Rating Each as "Important" or "Very important")



0% 20% 40% 60% 80% 100%

Question: How important would each generally be to how you would select the Alaska destinations you would visit? Base: Alaska oriented travelers. 2,000 responses.

DESTINATIONS OF INTEREST IN ALASKA

When asked which Alaska destinations they most want to visit in the next 2 years just 7.3 percent selected Mat-Su Valley specifically. However, when aggregating all the destinations within the valley, half of Alaska-oriented travelers say they want to visit a destination in the borough.

Because Denali is so widely known and is a top desired destination it absolutely needs to be leveraged in Mat-Su Valley's marketing and should be viewed as an easy hook to get travelers into the area which provides an increased opportunity to then influence them to visit the other, lesser-known towns and communities in the Mat-Su Valley.

Destinations of Interest in Alaska



Question: If you were to visit Alaska in the next two years, which of these destinations in the state would you most want to go? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

MAT-SU VALLEY LEISURE DESTINATION BRAND

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REASONS FOR WANTING TO VISIT THE MAT-SU VALLEY (UNAIDED)

For travelers who said they want to visit Mat-Su Valley specifically, they were asked—in an open-ended format—to describe their reasons for wanting to visit and the scenically beautiful setting and the chance to have great new experiences in the area appear to be the major driving forces. Opportunities for adventure, exploration and connecting with nature are also motivations for this group to visit the region.

Reasons for Wanting to Visit the Mat-Su Valley



Question: Earlier you said you would like to visit the Mat-Su Valley on a trip to Alaska. Please describe why. Base: Respondents who want to go to Mat-Su valley in the next two years. 137 responses.

TOP-OF-MIND ASSOCIATIONS WITH MAT-SU VALLEY (UNAIDED)

Mat-Su Valley is most associated with scenic beauty and being an amazing, interesting and exciting destination with wilderness and nature. This demonstrates the overwhelmingly positive perceptions of the destination brand. Typically, when this question is asked of lesserknown destinations the top cited responses are largely related to the destination being unknown, unfamiliar and sometimes perceived to be undesirable because it is so unknown. This is clearly not the case for Mat-Su Valley. The only potentially negative leaning descriptors cited were "remote" and "cold."

Top-of-Mind Associations with Mat-Su Valley



Question: What one word comes to mind when you think Mat-Su Valley as a place to visit for leisure? Base: Alaska oriented travelers. 1,615 responses.



AWARENESS OF THE MAT-SU VALLEY

Awareness of the Mat-Su Valley amongst Alaska-oriented travelers is low with just one-in-five having heard of the borough previously.

Awareness of the Mat-Su Valley

No



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Question: Prior to this survey, have you heard of Mat-Su Valley before? (Select one) Base: Alaska oriented travelers. 2,000 responses.

FAMILIARITY WITH MAT-SU VALLEY

Similarly, familiarity with Mat-Su Valley is low—just one-in-five of this audience considers themselves to be familiar or very familiar with the area. A majority (63.5%) are unfamiliar with the destination.

Familiarity with Mat-Su Valley



Question: How familiar are you with the Mat-Su Valley? (Select one) Base: Alaska oriented travelers. 2,000 responses.

APPEAL OF MAT-SU VALLEY

Despite the low levels of familiarity, travelers largely consider Mat-Su to be an appealing place for leisure trips. In fact, nearly twothirds (63.2%) finds Mat-Su to be appealing, and 34.2 percent are neutral about the destination.

Appeal of Mat-Su Valley



Question: Based on what you currently know, how appealing do you find Mat-Su Valley as a place to visit for leisure? (Select one) Base: Alaska oriented travelers. 2,000 responses.

PREVIOUS VISITS TO MAT-SU VALLEY

Amongst the travelers who have visited Alaska previously, 42.3 percent have visited Mat-Su before. A larger proportion have visited within the last 5 years (28.4%) compared to those who last visited over 5 years ago (13.9%).

Previous Visits to Mat-Su Valley



Question: Have you visited Mat-Su Valley before? (Select one) Base: Respondents who visited Alaska before. 703 responses.

LIKELIHOOD TO VISIT MAT-SU VALLEY IN 2021

Likelihood for this audience to visit Mat-Su in 2021 is moderate. Just a third (32.7%) of Alaska-oriented travelers say they are likely or very likely to visit the region in the next year while a similar proportion (33.2%) are unlikely to visit in 2021.

Those who said they are unlikely to visit Mat-Su next year are much likelier to say they "need more time to be ready to travel" compared to their counterparts (38.4% vs. 22.5% for those who said they are likely or very likely to visit the region in 2021). So at least in part, those unlikely to visit appear more deterred by the current coronavirus situation. Likelihood to Visit Mat-Su Valley in 2021



Question: How likely are you to visit Mat-Su Valley in 2021? (Select one) Base: Alaska oriented travelers. 2,000 responses.

MONTH OF VISIT TO MAT-SU VALLEY

Visitation to the Mat-Su Valley is likeliest to take place in the warm season months of June to August.

Interestingly, Alaska-oriented travelers who expressed interest in visiting Mat-Su during the cold season months of October to April are much likelier to be Millennials or younger (56.8% vs. 28.0% who prefer to visit during the warm season months). Cold season visitors are also much likelier to say they would visit Mat-Su with children under the age of 18 compared to warm season visitors (44.1% vs. 23.9%).

Month of Visit to Mat-Su Valley



Question: In which month(s) would you most likely visit Mat-Su Valley? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

RATING OF MAT-SU VALLEY ATTRIBUTES

Despite lower levels of familiarity with Mat-Su, Alaska-oriented travelers rate the region highly for opportunities to see new things, scenic beauty, being in nature and wildlife. Conversely the borough is rated lowest for ease of access, affordability, water activities and direct flight service.

Rating of Mat-Su Valley Destination Attributes

(Top-Two Box Score--% Rating Each as "Good" or "Very good" in Mat-Su Valley)



Question: Please rate Mat-Su Valley as a leisure destination for the following attributes using the scale below. Even if you are unfamiliar with Mat-Su Valley, please answer based on your current perceptions. Base: Alaska oriented travelers. 2,000 responses.

METHOD OF ARRIVAL

A majority of travelers would arrive to the Mat-Su valley by air if visiting. However, over a quarter say they would arrive via cruise line (28.6%) or by road (28.3%).

Younger travelers, Gen X and Millennials, are likelier to say they would arrive to the region by air (70.7% and 71.2%, respectively), while Baby Boomers—who also are most likely to arrive by air (58.0%)—are more likely than their younger counterparts to say they would travel to Mat-Su Valley by road (33.8% vs. 27.6% for Gen X and 22.8% for Millennials)

Method of Arrival



Question: How would you get to Mat-Su Valley? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

PLACE OF STAY

4-star hotels are the preferred place of stay in Mat-Su. Over half of this audience said they would stay in such accommodations if visiting the region, while a third (34.3%) are likely to stay in a 3-star property. Over a quarter (26.7%) would opt to stay in more luxury accommodations such as a 5-star hotel while one-in-five (22.7%) would stay in a vacation home rental.

Millennials are much likelier to seek out luxury accommodations (39.1% say they would stay in a 5-star hotel on a Mat-Su trip vs. 27.2% for Gen X and 15.1% for Boomers). Additionally, they are also more likely to stay in a vacation home rental than older travelers (30.1% vs. 22.4% for Gen X and 16.2% for Boomers).

Place of Stay



Question: Where would you stay? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses. On average, these travelers would spend approximately 4.6 days and 4.2 nights in the region. Interestingly, length of stay does not differ much between generations and regions of the U.S., each segment reported a likely length of stay of just over 4 days.

Length of Stay (Days)



Length of Stay (Nights)



Question: How many days and nights would you spend in the Mat-Su Valley? (Select one) Days: Base: Alaska oriented travelers. 2,000 responses. Question: How many days and nights would you spend in the Mat-Su Valley? (Select one) Nights: Base: Alaska oriented travelers. 2,000 responses.

TRAVEL PARTY COMPOSITION

A majority of travelers would visit the region with their spouse or significant other and nearly a quarter would visit with a friend group. In total, 27.7 percent would visit with children under the age of 18. Very few, just 8.7 percent say they would visit the Mat-Su Valley on a solo trip.

Travel Party Composition



Question: Who would you travel with? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

DAILY IN-MARKET SPENDING

The typical Alaska-oriented traveler anticipates spending an average of \$551 per day in-market for a Mat-Su Valley trip. However, nearly a quarter (24.0%) would spend over \$800 per day on such a trip.

Those who anticipate spending over \$800 per day in Mat-Su are much likelier to be Millennials (51.6%), whereas Baby Boomers are much more likely to spend under \$800 per day in-market (42.9%).

Daily In-Market Spending



Question: How much would you likely spend PER DAY for all of your purchases (hotel, food, transportation, shopping, entertainment, etc.) while in Mat-Su Valley? Exclude the cost of getting to Alaska. (Select one) Base: Alaska oriented travelers. 2,000 responses.

The activities travelers are most likely to engage in on a Mat-Su trip include seeing wildlife, dining in local restaurants, seeing the mountains and experiencing the outdoors. Nearly half also said they would be likely to see the Northern Lights, see a glacier, take a day tour/excursion and take a scenic day drive in the area.

Desired Mat-Su Valley Activities



Question: What would you most likely do? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

DESIRED MAT-SU VALLEY TRAVEL EXPERIENCES

By far, the Mat-Su Valley experience travelers desire most is enjoying in the area's scenic beauty. Secondary to this is having a trip experience that is relaxing, affordable, unique and adventurous.

Messaging on how a trip to Mat-Su can deliver on these desires will be key to converting these travelers into actual visitors.

Desired Mat-Su Valley Travel Experiences



Question: Which of the following would you like in your travel experience in Mat-Su Valley? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

MESSAGING & REACHING TRAVELERS



ATTRIBUTE IMPORTANCE VS. RATING IN MAT-SU

Amongst Alaska-oriented travelers, Mat-Su underperforms for many of the attributes considered most important to the Alaska destination selection process—especially for affordability, ease of access, welcoming atmosphere and local food scene. This is largely due to this audience's lower familiarity with the region as many of these attributes were rated as "neutral" as opposed to "poor." Nevertheless, this highlights a pressing need to educate these travelers about Mat-Su's opportunities to see new things, scenic beauty, welcoming atmosphere, value/affordability, ease of access and local food scene to increase their consideration of Mat-Su for a future trip.

Questions: 1. How important would each generally be to how you would select the Alaska destinations you would visit? 2. Please rate Mat-Su Valley as a leisure destination for the following attributes using the scale below. Even if you are unfamiliar with Mat-Su Valley, please answer based on your current perceptions. Base: Alaska oriented travelers. 2,000 responses.



Attribute Importance to Selecting Alaska Destinations to Visit vs. Mat-Su Valley Rating

DETERRENTS TO VISITING MAT-SU VALLEY

The most significant deterrent to visitation is a lack of knowledge about the Mat-Su Valley as a place to visit for leisure. Although it is widely viewed as a region that is appealing for leisure travel, more education about the borough's specific offerings is needed to motivate trips.

Secondarily, there are perceptions that it is too far away, too expensive to get to and too difficult to reach that has hindered visitation. Messaging against these perceptions in conjunction with education travelers about the region's destination product may increase their consideration of Mat-Su Valley.

Deterrents to Visiting Mat-Su Valley



Question: Which are reasons you have not visited Mat-Su Valley in the past 5 years? (Select all that apply) Base: Respondents who have not visited Mat-Su valley in the past 5 years. 543 responses.

DIGITAL RESOURCES USED FOR DESTINATION INSPIRATION

Highlighting the need for a good search marketing and content strategy, half of travelers say they regularly conduct searches on the internet for leisure destination inspiration. They also get inspiration on where to travel from travel review websites and online travel agencies. Additionally, a social strategy will increase Mat-Su Valley's reach as nearly a third of travelers turn to friends/family through social media and a quarter use social media services to get ideas on where to travel.

Digital Resources Used for Destination Inspiration



Question: From which digital resources do you get ideas and inspiration for where to travel to for leisure? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

NON-DIGITAL RESOURCES USED FOR DESTINATION INSPIRATION

Aside from word-of-mouth from their networks, the top non-digital resources travelers use for destination inspiration include travelrelated TV shows, travel brochures, television programs, travel books and print magazine articles.

Non-Digital Resources Used for Destination Inspiration



Question: From which non-digital resources do you get ideas and inspiration for where to travel to for leisure? (Select all that apply) Base: Alaska oriented travelers. 2,000 responses.

Advanced Trip Planning Window

The travel planning window for a Mat-Su Valley trip would be 11.1 months on average. In fact, 43.0 percent of travelers said they would start planning their travel to Mat-Su 6-12 months in advance of their travel and 35.8 percent would start planning their trip a year or more in advance.

Advanced Trip Planning Window



Question: How far in advance would you start planning your travel? (Select one) Base: Alaska oriented travelers. 2,000 responses.

Respondent Demographics

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	Alaska-Oriented	High Potential
	Travelers	Summer '21 Visitor
Female	50.7%	39.9%
Male	49.2%	59.8%
Millennial or younger (18-39)	33.5%	48.0%
Gen X (40-54)	29.2%	28.6%
Boomer or older (55-76)	37.3%	23.4%
Mean Age	48.1	43.3
\$200,000 or more	8.4%	8.1%
\$150,000 to \$199,999	11.4%	12.3%
\$125,000 to \$149,999	13.3%	15.2%
\$100,000 to \$124,999	14.8%	16.5%
\$76,000 to \$99,999	17.4%	16.5%
\$60,000 to \$75,999	11.5%	9.4%
\$40,000 to \$59,999	12.5%	10.8%
Under \$40,000	11.0%	11.0%
Mean Annual Household Income	\$105,154	\$108,161
Employed (full or part-time)	65.7%	77.7%
Retired	18.7%	8.7%
Self-employed	6.1%	7.1%
Homemaker	4.8%	2.6%
Not currently employed	4.8%	3.9%
Base	2000	381

	Alaska-Oriented Travelers	High Potential Summer '21 Visitor
Married or partnered	69.2%	72.7%
Single	28.5%	25.5%
Other	2.4%	1.8%
Has Children Under 18 in Home	35.8%	56.2%
Completed graduate degree	29.5%	27.8%
Some graduate school	5.1%	4.7%
College graduate	39.4%	42.0%
Some college	16.9%	15.0%
High school graduate	8.8%	9.7%
Some high school or less	0.4%	0.8%
White	79.0%	75.9%
Asian	8.6%	9.4%
Black/African-American	6.2%	5.0%
Hispanic/Latino	4.2%	7.3%
Two or more races	1.5%	1.6%
Native Hawaiian/Pacific Islander	0.4%	0.3%
American Indian/Native Alaskan	0.3%	0.5%
Base	2000	381