

ALASKA VISITOR VOLUME REPORT

Winter 2018-19 and Summer 2019

PREPARED FOR:

Alaska Travel Industry Association

June 2020

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Visitor Volume, Winter 2018-19

Between October 2018 and April 2019, an estimated 323,000 out-of-state travelers visited Alaska. Nearly all winter visitors (96%) exited the state by air, while 4% exited by highway or ferry. Visitor volume barely increased from 2017-18: by 2,000 people, or 0.6%. Air exits likewise increased by 0.6%, while highway/ferry exits increased by 2.3%.

Table 1. Alaska Visitor Volume Winters 2017-18 and 2018-19, By Exit Mode

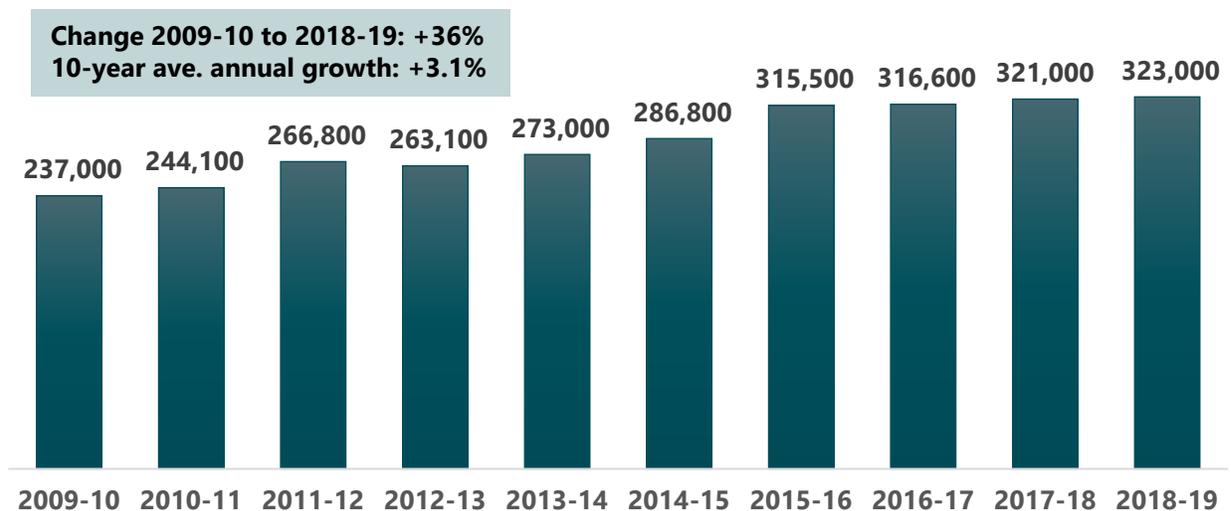
| | 2017-18 | 2018-19 | % Change |
|---------------|----------------|----------------|--------------|
| Air | 308,000 | 309,700 | +0.6% |
| Highway/ferry | 13,000 | 13,300 | +2.3% |
| Total | 321,000 | 323,000 | +0.6% |

While a few cruise ships make Alaska voyages in April and October, these visitors represent a tiny fraction of the total and are included in the summer visitor count for consistent reporting on cruise passengers.

Long-Term Winter Visitor Volume

The most recent winter season represented a small increase (0.6%) compared with the 10-year annual average rate of 3.1%. The 2018-19 volume was 36% up from a decade earlier (2009-10).

Chart 1. Alaska Visitor Volume, Winters 2009-10 to 2018-19



Traffic and Tax Indicators

Table 2 presents changes in traffic data and other indicators between winters 2017-18 and 2018-19. Unless otherwise indicated, data refers to the October to April time period. All numbers refer to Alaska residents and out-of-state visitors combined.

- Domestic air exiting traffic (visitors and residents combined) showed no change between 2017-18 and 2018-19, and there were only minimal changes by port. Anchorage was up by 1% and Ketchikan was up by 2%, while Juneau and Sitka were down slightly (by 2% and 4%, respectively). Fairbanks and “other” airports showed no change. (“Other” airports include Petersburg, Wrangell, Cordova, and Yakutat.)
- The number of passengers exiting via international air fell 22% in 2018-19. As in 2017-18, there was only one international carrier in each airport: Korean Air in Anchorage, and Japan Airlines in Fairbanks. Both airlines reported decreased enplanements in 2018-19, for a combined decrease of about 200 passengers. (Because many international visitors to Alaska depart via domestic air, international air enplanements are not necessarily reflective of the international visitor market.)
- Total Alaska Marine Highway System (AMHS) ridership was down by 2% in 2018-19.
- Anchorage bed tax revenues showed the strongest growth, increasing by 14%, while Fairbanks revenues increased by 5%. Juneau and Mat-Su were each down by 1%. (Other municipalities’ bed taxes tend to not be reflective of the winter market, as some summer bed tax sales are reported in the 4th quarter.)
- The large increase in Anchorage bed tax revenues appears to be at odds with flat domestic air numbers. Note that bed tax revenues may reflect higher room rates in addition to more visitors. Also, the air traffic estimate is based on 2011-12 ratios, and assumes that visitors and residents change their travel habits at the same rate. There may indeed have been an increase in visitors in winter 2018-19, but without new ratios, it is difficult to detect.
- Car rental tax revenues in Anchorage increased by 9% between winter 2017-18 and 2018-19.
- Anchorage convention attendance by out-of-town visitors was up by 4% in winter 2018-19, while Fairbanks convention attendance was up by 3%.

**Table 2. Winter Visitor Industry Indicators
Change between 2017-18 to 2018-19**

| | % Change |
|--|------------------|
| Air passengers exiting Alaska, Oct-April | |
| Anchorage | +1% |
| Fairbanks | No change |
| Juneau | -2% |
| Ketchikan | +2% |
| Sitka | -4% |
| Other | No change |
| Total Domestic | No change |
| Total International | -22% |
| Alaska Marine Highway traffic, Oct-April | |
| Total passengers | -2% |
| Bed tax revenues, 4th plus 1st quarters | |
| Anchorage | +14% |
| Fairbanks | +5% |
| Juneau | -1% |
| Mat-Su | -1% |
| Vehicle tax revenues, 4th plus 1st quarters | |
| Anchorage car rental | +9% |
| Convention attendance, October-April | |
| Anchorage | +4% |
| Fairbanks | +3% |

Notes: Air passenger traffic includes both residents and non-residents. Fairbanks bed tax figures reflect combined revenues from City of Fairbanks, City of North Pole, and Fairbanks North Star Borough. Fairbanks convention numbers reflect number of room nights associated with conventions, not number of attendees.

Sources: Alaska Airlines, Alaska Department of Transportation and Public Facilities, Alaska Marine Highway System, Municipality of Anchorage, Visit Anchorage, Explore Fairbanks, and City and Borough of Juneau.

Industry Observations

Following is a summary of industry contacts' observations on Alaska's winter visitor market in 2018-19. (A list of contributing organizations is provided in the Methodology section.)

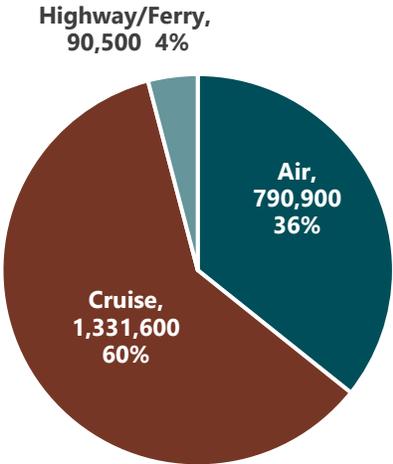
- For some operators, winter 2018-19 was the first year in many years that didn't show growth. They attributed this primarily to the Asian market. Political tension between U.S. and China and difficulty obtaining visas were blamed for some of the slowdown in Chinese travelers. One business catering to Chinese business travelers said their market dried up last year.
- Other operators reported continued growth in the winter market, building on the momentum of previous seasons. One lodging establishment noted that March 2019 was their best month ever, including summer months. They also observed that winter travelers had longer average stays than summer travelers.
- The number of Fairbanks "micro-businesses" catering to the winter market increased, a trend noted in recent years by industry participants. There are new aurora viewing facilities, ice-fishing tours, and dog-sledding tours.
- A DMO representative noted that Anchorage had benefited from increased winter tourism promotional efforts including aurora viewing.
- The non-resident ski market was reported to be flat between 2017-18 and 2018-19.

Volume by Transportation Market

An estimated 2,213,000 out-of-state visitors traveled to Alaska between May and September 2019. By transportation market, 1,331,600 traveled by cruise ship, 790,900 were air visitors (entered *and* exited the state by air), and 90,500 were highway/ferry visitors (entered *or* exited the state by highway *or* ferry).

AVSP methodology counts visitors as they exit the state, by transportation mode (airport, highway, ferry, and cruise ship). However, measuring traffic by transportation market is useful because many cruise ship passengers exit the state via air; in addition, the highway and ferry markets overlap, making it practical to group them together.

Chart 2. Alaska Visitor Volume by Transportation Market, Summer 2019

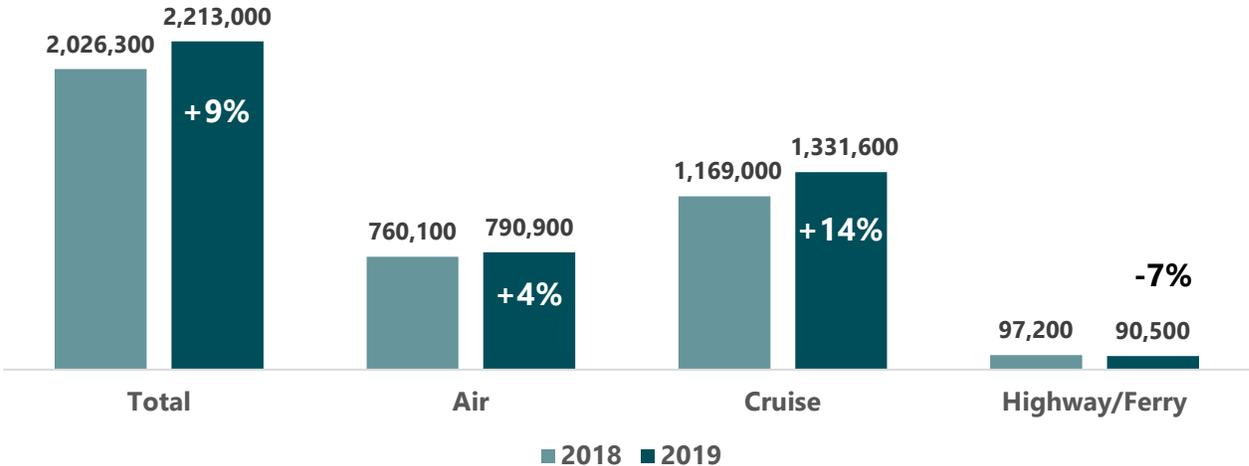


Total Visitor Volume: 2,213,000

Change from Summer 2018

Summer 2019 visitor volume represented an increase of 9% (187,000 visitors) from summer 2018. Most of the increase is attributable to the cruise market, which grew by 14% (163,000 visitors). The air market increased by 4% (31,000 visitors), while the highway/ferry market decreased by 7% (7,000 visitors). In terms of market representation, cruise passengers increased from 58% of the summer 2018 total to 60% of the summer 2019 total.

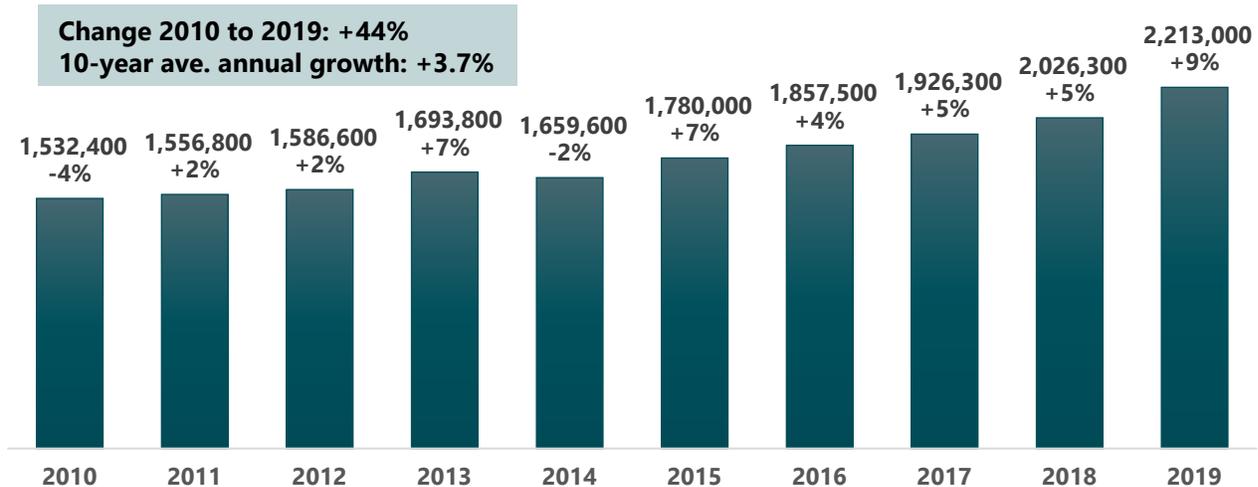
Chart 3. Alaska Visitor Volume, Total and By Transportation Market, Summers 2018 and 2019



Trends in Total Volume

The summer 2019 visitor volume of 2,213,000 is the fifth consecutive summer of growth, and the largest single-year growth in the last decade. Last summer's volume was 44% more than the volume a decade earlier (2010).

Chart 4. Alaska Visitor Volume, Summers 2010-2019



Trends by Transportation Market

The chart and table on the following page show how visitor volume to Alaska has fluctuated over the last decade, broken down by air, cruise, and highway/ferry transportation markets.

- The air market experienced its seventh consecutive year of growth in summer 2019, with 37% more visitors than a decade earlier. The 2019 increase was greater (4%) than the previous two years' growth (1% to 2% each year).
- Cruise passenger volume experienced its biggest year-over-year increase of the last decade. Volume increased by 14%, on the heels of four previous annual increases: 3% in 2015, 3% in 2016, 6% in 2017, and 7% in 2018. The 2019 total was 52% above the level of a decade earlier. Cruise volume is projected to increase another 5% in 2020.
- The highway/ferry market declined in 2019 for the first time since 2014. Personal vehicle border crossings fell at three out of four borders; only the Klondike Highway near Skagway saw an increase. While ferry passengers account for a small fraction of highway/ferry volume, they were likewise down. Last summer's highway/ferry volume was still 19% higher than a decade earlier, however.

See chart and table, next page.

Chart 5. Trends in Summer Visitor Volume, By Transportation Market, 2010-2019

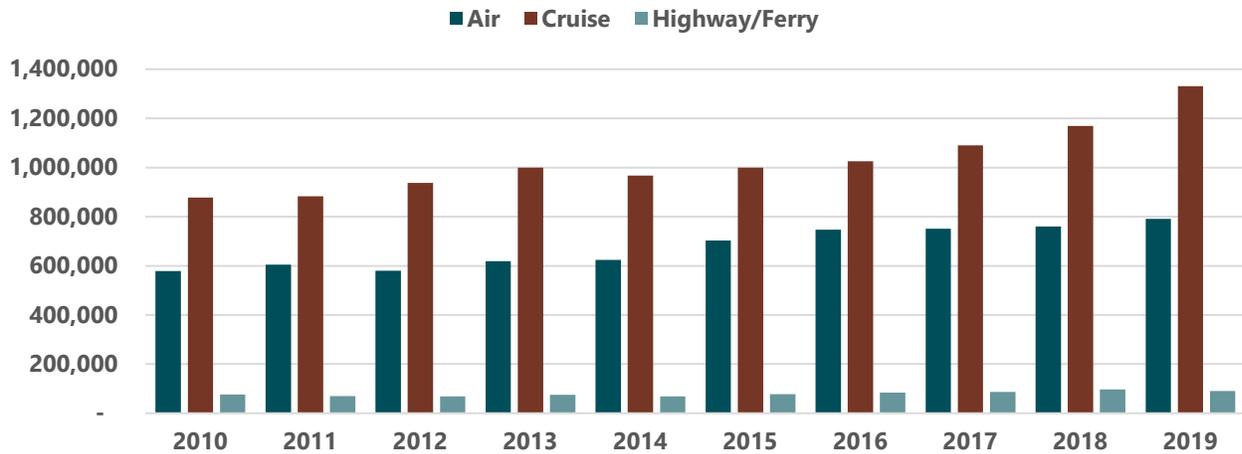


Table 3. Trends in Summer Visitor Volume, By Transportation Market, 2010-2019

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|-------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Air | 578,400 | 604,500 | 580,500 | 619,400 | 623,600 | 703,400 | 747,100 | 750,500 | 760,100 | 790,900 |
| Cruise ship | 878,000 | 883,000 | 937,000 | 999,600 | 967,500 | 999,600 | 1,025,900 | 1,089,700 | 1,169,000 | 1,331,600 |
| Highway/ Ferry | 76,000 | 69,300 | 69,100 | 74,800 | 68,500 | 77,000 | 84,500 | 86,100 | 97,200 | 90,500 |
| Total | 1,532,400 | 1,556,800 | 1,586,600 | 1,693,800 | 1,659,600 | 1,780,000 | 1,857,500 | 1,926,300 | 2,026,300 | 2,213,000 |
| % change | -4.3% | +1.6% | +1.9% | +6.8% | -2.0% | +7.3% | +4.4% | +3.7% | +5.2% | +9.2% |

Sources: AVSP 6 and 7.

Cruise Volume by Port

Table 4 shows the number of cruise passengers by location for ports visited by at least 10,000 passengers. Juneau, Ketchikan, and Skagway represent the top three ports, capturing between 78% and 98% of statewide volume. Secondary ports including Icy Strait Point, Seward, Sitka, and Whittier receive between 15% and 20% of statewide volume. The remaining ports are visited by 5% or less of total passengers statewide.

“Cross-gulf” volume, ships that cross the Gulf of Alaska, is represented by Seward plus Whittier passengers; their total was 431,700, or 32% of the statewide total. The remaining 68% were on round-trip cruises.

Table 4. Alaska Cruise Volume by Port, 2019 (> 10,000 passengers)

| | Passengers | % of Total |
|------------------|------------|------------|
| Juneau | 1,305,700 | 98% |
| Ketchikan | 1,186,400 | 89% |
| Skagway | 1,035,800 | 78% |
| Icy Strait Point | 267,200 | 20% |
| Seward | 237,900 | 18% |
| Sitka | 218,600 | 16% |
| Whittier | 193,800 | 15% |
| Haines | 63,400 | 5% |
| Kodiak | 26,300 | 2% |
| Wrangell | 17,300 | 1% |
| Homer | 14,800 | 1% |
| Anchorage | 13,700 | 1% |
| Valdez | 12,400 | 1% |

Source: Cruise Line Agencies of Alaska and small cruise lines.

Traffic and Tax Indicators

Table 5 presents changes in traffic data and other indicators comparing the 2019 summer visitor season with the previous year. Unless otherwise indicated, data refers to the May through September time period.

- Domestic air traffic exiting Alaska (including both residents and visitors) grew by 4% in summer 2019, with increases ranging from 2% (Sitka) to 6% (Fairbanks). Only “other” airports showed a decrease (by 2%; this includes Petersburg, Wrangell, Cordova, and Yakutat).
- International air traffic was down by 10% in summer 2019. (This is not necessarily an indicator of international visitors, as most travel via cruise ship or domestic air.) Three airlines stopped serving Alaska (Korean Air, Edelweiss, Hainan) while others carried fewer passengers (Condor, Japan Airlines, Yakutia, Icelandair).
- While the overall increase in 2019 cruise passenger traffic was 14%, round-trip volume increased more than cross-gulf volume (18% versus 11%). Small ship passenger volume (ships with capacities of less than 300 passengers) grew by 11%.
- AMHS passenger volume fell by 22% in 2019, impacted by fewer scheduled sailings, laid-up vessels, and the labor strike in August.
- The number of non-resident sportfishing licenses sold by the Alaska Department of Fish and Game between January and September increased by 3% in 2019.
- Bed tax revenues were up in every community for which data was available, with the highest increase in Anchorage (up by 14%) and the smallest increase in Fairbanks (up by 1%). (Note that bed tax revenues can reflect changes in room rates as well as volume, and are attributable to both residents and visitors.)
- Anchorage car rental tax revenues were up by 8% in summer 2019, while RV rental tax revenues were down by 8%.

**Table 5. Summer Visitor Industry Indicators
Change 2018 to 2019**

| | % Change |
|--|-------------|
| Air Passengers Exiting Alaska | |
| Anchorage | +4% |
| Fairbanks | +6% |
| Juneau | +3% |
| Ketchikan | +3% |
| Sitka | +2% |
| Other | -2% |
| Total Domestic | +4% |
| Total International | -10% |
| Cruise Passengers | |
| Total passengers | +14% |
| Cross-gulf passengers | +11% |
| Round-trip passengers | +18% |
| Small ship passengers | +11% |
| Alaska Marine Highway Traffic | |
| Total passengers | -22% |
| Non-Resident Sportfishing Licenses (Jan-Sept) | |
| Number of licenses sold | +3% |
| Bed tax revenues, 2nd plus 3rd quarters | |
| Anchorage | +14% |
| Fairbanks | +1% |
| Mat-Su* | +13% |
| Juneau | +5% |
| Ketchikan | +7% |
| Sitka | +6% |
| Vehicle tax revenues, 2nd plus 3rd quarters | |
| Anchorage car rental | +8% |
| Anchorage RV rental | -8% |

Notes: Air passenger traffic includes both residents and non-residents. Fairbanks bed tax figures reflect combined revenues from City of Fairbanks, City of North Pole, and Fairbanks North Star Borough.

Sources: Alaska Airlines, DOT&PF, ADF&G, AMHS, Municipality of Anchorage, Visit Anchorage, Explore Fairbanks, Mat-Su CVB, City and Borough of Sitka, Ketchikan Gateway Borough, and City and Borough of Juneau

Industry Observations

Following is a summary of industry contacts' observations on Alaska's summer visitor market in 2019. (A list of contributing organizations is provided in the Methodology section.)

- The large increase in cruise ship capacity was reported to be associated with several trends in summer 2019:
 - Cruise passengers booked later, closer to their time of travel.
 - Cruises were discounted in order to fill the ships, attracting lower-income travelers.
 - Passengers were less likely to purchase high-end shore excursions.
 - Passengers on cross-gulf voyages were more likely to stay only in Anchorage and to stay for shorter amounts of time.
 - Passengers were less likely to purchase land tours with their cruise. Lower average incomes and last-minute planning were cited as factors.
- Cruise passengers are becoming more savvy about traveling independently and planning less traditional land tours. They want more customization. They were more likely to rent cars in 2019 both in Southeast ports and in the Railbelt. They are more comfortable navigating on their own than in the past. One contact also observed a trend of cruise passengers desiring smaller groups.
- Southeast shore excursion sales were strong overall, although not as strong as the traffic increase suggested. The Ketchikan air accidents in May discouraged flightseeing purchases.
- Unfavorable exchange rates discouraged some international travelers but others reported increases including in the UK and Australia. One operator noted a long-term, slow decline in the GSE (German-Speaking Europe) market.
- One contact associated a downturn in Chinese travelers with news that the Chinese government had advised citizens not to travel to the U.S.; however, others did not experience a downturn in Chinese travelers.
- The sunny weather in Southeast contributed to more cruise passengers disembarking, more outdoor tour sales, and fewer cancelled flights.
- It was a "chaotic" summer in terms of unexpected events.
 - Wildfires had a big impact on some businesses, particularly in the Kenai and Talkeetna areas. Some businesses lost significant revenue due to cancellations, disrupted transportation, and displaced guests. Flightseeing tours were cancelled due to smoke. Rental cars were in very high demand by visiting firefighters and officials.
 - Other travel disruptions included the collapse of a hillside in the Denali area that impacted the railroad and the AMHS labor strike.
- Several operators reported increases in the adventure market, including multi-day outdoor-oriented packages. One noted that National Parks are gaining in popularity and name recognition.

U.S. Travel and Economic Indicators

Nationwide travel indicators mostly showed incremental growth in 2019. Travel spending was estimated to be up by 3.2%, and domestic person-trips were up by 1.7%. International travel and spending were both down, by 1.0% and 1.7% respectively; however, overseas travelers (who make up nearly all of Alaska’s international travelers) were up by 1.5%. Hotel occupancy rate showed no change, while ADR (average daily rate) was up by 1.0% and RevPAR (revenue per available room) was up by 0.9%.

U.S. economic indicators were strong in 2019, with GDP up by 2.2%, unemployment down by 0.2%, and the Consumer Price Index up by 2.6%.

Looking ahead, the U.S. Travel Association projects domestic travel to increase by 1.4% in 2020, then by 1.6% in 2021.¹ U.S. travel expenditures are projected to be up by 3.3% in 2020, and 3.6% in 2021.

Table 6. U.S. Economic and Travel Industry Indicators 2018-19

| | Change 2018-19 |
|--|-------------------|
| U.S. Travel Indicators | |
| Total travel spending in the U.S. | +3.2% |
| U.S. residents | +4.0% |
| International visitors | -1.7% |
| International travelers to U.S. | -1.0% |
| Overseas travelers | +1.5% |
| Total U.S. domestic person-trips | +1.7% |
| Business | +1.1% |
| Leisure | +1.9% |
| Hotel indicators | |
| Occupancy rate | No change |
| ADR (average daily rate) | +1.0% |
| RevPAR (revenue per available room) | +0.9% |
| U.S. Economic Performance | |
| Real GDP | +2.2% |
| Unemployment rate (% of labor force) | -0.2% |
| Consumer Price Index | +2.6% |

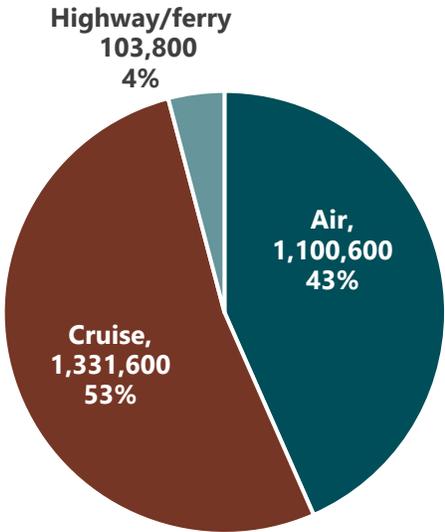
Source: U.S. Travel Association *Travel Forecast Fall 2019*; STR.

¹ www.ustravel.org

Combining results of the Winter 2018-19 and Summer 2019 study periods, the volume of out-of-state visitors to Alaska for the 12-month period of October 2018 through September 2019 was 2,536,000. The summer market (2,213,000) represented 87% of the annual volume; the winter market (323,000) represented 13%. The full-year volume of 2018-19 represents an increase of 8.0% over the previous 12-month period.

The chart at right shows the full-year volume by transportation market. The cruise ship volume of 1,331,600 includes all cruise ship visitors (regardless of entry/exit transportation mode). The air volume of 1,100,600 represents all visitors who entered and exited Alaska via air (excluding cruise ship passengers). The highway/ferry volume of 103,800 includes all visitors who entered or exited Alaska via highway or ferry.

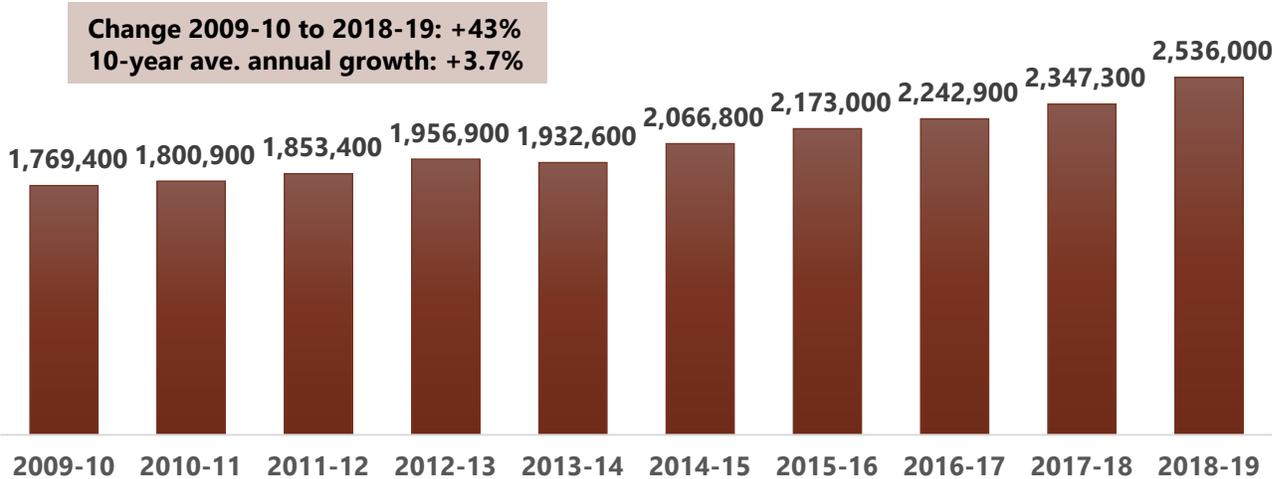
Chart 6. Alaska Visitor Volume, Full Year, 2018-19, By Market



Total Visitor Volume: 2,536,000

The chart below shows annual Alaska visitor volume over the last ten periods. Last year's total of 2,536,000 was 43% above the volume ten years earlier (2009-10). The most recent increase of 8.0% is the fifth consecutive year of growth, following annual increases in the 3% to 7% range since 2014-15.

Chart 7. Annual Alaska Visitor Volume, 2009-10 to 2018-19



Source: AVSP 6 and 7. Note that these numbers differ from previously reported annual estimates due to a change from a May-to-April study period to an October-to-September study period.

This report provides visitor volume estimates for Alaska for three study periods:

- Winter 2018-19 (October 2018 through April 2019)
- Summer 2019 (May through September 2019)
- Full Year 2018-19 (October 2018 through September 2019)

Note that previous Winter Visitor Volume reports included Full Year estimates based on a May-through-April time period. This report changes the schedule to October-through-September to be consistent with the time period used in recent economic impact analyses.

For additional information on both visitor volume and visitor characteristics, please refer to the following studies:

Alaska Visitor Statistics Program 6 (Summer 2011 and Fall/Winter 2011-12)

Alaska Visitor Statistics Program 7 (Summer 2016 only)

These are available at the following link:

<https://www.alaskatia.org/marketing/alaska-visitors-statistics-program-avsp-vii>

Visitor volume is estimated by exit mode; the methodology is slightly different for each mode.

Domestic and International Air: Outgoing traffic by month and by port was gathered from Alaska Airlines, Delta Airlines, Alaska Department of Transportation and Public Facilities (for Anchorage and Fairbanks airport traffic), Ketchikan International Airport, and Juneau International Airport. Visitor/resident ratios were applied to monthly traffic, by port, to arrive at visitor volume estimates. Summer ratios were determined in the 2016 AVSP survey fielding period, during which time 53,394 flight passengers were tallied as they embarked on flights exiting Alaska. Winter ratios were determined in the winter 2011-12 AVSP survey fielding period, during which time 34,381 domestic flight passengers and 3,634 international flight passengers were tallied as they embarked on flights exiting Alaska. Tallies took place at airports in Anchorage, Fairbanks, Juneau, Ketchikan, and Sitka. (The most recent AVSP included only the summer period of 2016, not the fall/winter period; fall/winter ratios have not been updated since 2011-12.)

Cruise: Cruise Line Agencies of Alaska (CLAA) provided passenger data for every port and every cruise ship for the summer 2019 season. The few small ship lines that do not use CLAA services also provide passenger volumes. Two numbers are generated from this data: the total number of cruise passengers, and the number of passengers who exit Alaska via cruise ship. The total number of cruise passengers is determined by adding together the maximum number of passengers recorded for each ship (without double-counting passengers who call at the same port twice). The number of passengers exiting Alaska is determined by counting the passengers aboard each ship as it exited the state (sailed southbound from an Alaska port to a Canadian port, or sailed eastbound towards Asian ports). All cruise ship passengers are assumed to be visitors. To minimize confusion, passengers on late-April and early-October sailings are grouped with the summer passenger counts.

Highway: Highway border crossing data was gathered from the U.S. Department of Homeland Security. While all other traffic data refers to exiting traffic, entering traffic is used for highway estimates due to Yukon border data being incompatible with AVSP methodology. The assumption is made that a similar number of people cross the border each direction, as previous data has shown.

Visitor/resident ratios were applied to monthly traffic, by port, to arrive at visitor volume estimates. Summer ratios were determined in the summer 2016 AVSP survey fielding period, during which time 4,047 highway travelers were tallied as they drove the highway, before exiting Alaska. Tallies occurred at four locations: near the US border stations on the Klondike, Haines, and Alcan Highways, and north of Tetlin Junction on the Taylor highway. Winter ratios were based on tallies conducted in AVSP V (2006-07) because no highway tallies were conducted for AVSP VI (2011-12).

Ferry: The Alaska Marine Highway provided exiting traffic data by month and port (passengers disembarking at Bellingham and Prince Rupert). Because AMHS no longer requires zip codes when passengers purchase a ticket, visitor/resident ratios from 2015 were applied to total passengers, by month and port, to arrive at estimated visitor volume.

Visitor/Resident Ratios

The following table shows the percentage of all travelers exiting the state by various transportation modes who are out-of-state visitors (rather than Alaska residents) during the three study periods. For example, an estimated 71.2% of travelers who exited Alaska via Domestic Air in summer 2019 were visitors. These ratios are a composite of ratios by location, by month. Because they apply to traffic data on a monthly and by-location basis, applying them to overall traffic will not yield the same results.

It is important to note that the highway ratio refers to highway travelers who are exiting the state for the final time on their trip. This eliminates the possibility of double-counting visitors who exit the state twice – for example, ferry passengers who exit the state at Beaver Creek, then re-enter at Haines to board a ferry.

Table 7. Visitor Percentages, by Mode

| Exit Mode | Winter 2018-19 | Summer 2019 |
|----------------------|-----------------------|--------------------|
| Domestic air | 32.3% | 71.2% |
| International air | 100.0% | 78.8% |
| Cruise ship | n/a | 100.0% |
| Highway ¹ | 21.2% | 34.5% |
| Ferry | 25.4% | 64.6% |
| Total | 31.7% | 79.8% |

¹ The highway ratio refers to “last-exit” visitors: not planning to re-enter Alaska on the same trip.

Sources

McDowell Group acknowledges the following entities for their assistance in providing traffic data for the project.

Alaska Airlines
Alaska Department of Transportation and Public Facilities
Alaska Marine Highway System
Cruise Line Agencies of Alaska
Delta Airlines
Juneau International Airport
Ketchikan International Airport
U.S. Department of Homeland Security

Additional sources for traffic and tax indicators included the following:

- Bed tax revenue data from Municipality of Anchorage, Mat-Su Convention and Visitors Bureau, Explore Fairbanks, City and Borough of Sitka, Ketchikan Gateway Borough, and City and Borough of Juneau.
- Vehicle and RV rental tax revenue data from Municipality of Anchorage.
- Convention attendance from Visit Anchorage and Explore Fairbanks.
- Fishing license sales data from the Alaska Department of Fish and Game.

McDowell Group conducted 20 interviews with visitor industry executives to gather insights into both the winter 2018-19 and summer 2019 seasons. They represented a range of businesses and organizations: DMOs, receptive tour operators, shore excursion providers, cruise industry representatives, and accommodations. McDowell Group thanks the following organizations for sharing their insights into the winter 2018-19 and summer 2019 visitor seasons.

Alaska Alpine Adventures
Alaska Railroad
Alaska Travel Adventures
Alaska Wildland Adventures
All Alaska Tours
Alyeska Hotel
A Taste of Alaska Lodge
Avis
Chilkat Guides
Cruise Line International Association – Alaska
Explore Fairbanks
Gastineau Guiding
Icy Strait Point
My Alaska Tours
Northern Alaska Tour Company
Ketchikan Visitors Bureau
Knightley Tours
Mat-Su Convention and Visitors Bureau
Premier Alaska Tours
Skylar Travel
Visit Anchorage