



Alaska 2022-2023 Tourism Impact Model

Destination  Analysts





EXECUTIVE SUMMARY

Alaska's tourism industry is experiencing a steady rebound from the COVID-19 pandemic and continues to be a major economic driver in the state. The Alaska Travel Industry Association's Tourism Impact Report represents travel in summer 2022 and winter 2022/23 and serves as baseline research to demonstrate where Alaska was positioned immediately following the COVID-19 pandemic.

Data was collected between May 2022 – April 2023 (summer 2022 and winter 2022/23) and resulted in the following highlights:

- In the full year, Alaska saw 2.7 million visitors who spent an average of 8.5 nights in the state.
- Alaska's visitors directly spent approximately \$3.9 billion in the state, with a total economic impact of \$5.6 billion.
- Alaska's travel industry supported 43,661 jobs.
- The Inside Passage remains the most visited region in the state, seeing 67 percent of travelers, while Southcentral was the second most visited region with 50 percent of travelers.
- 74 percent of travelers were very satisfied with their vacation.

Knowing that 2022 was not a typical travel year, this research will allow ATIA to build on this foundational knowledge coming out of the pandemic. Key factors that played into the overall recovery during the study's timeframe included:

- Alaska's cruise industry rebounded strongly and continues to show signs of even more growth.
- Independent travel continued to contribute to the state's tourism recovery.
- Due to ongoing travel restrictions, Alaska's international travel market rebound was slowed.

This study is only one piece of ATIA's data matrix and is part of a larger picture the organization is analyzing as it continues to plan for the future of Alaska's tourism industry.

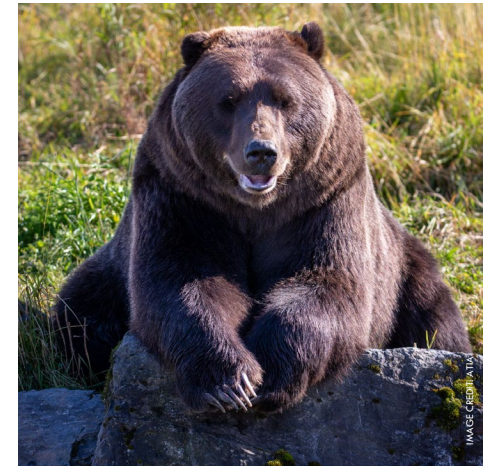
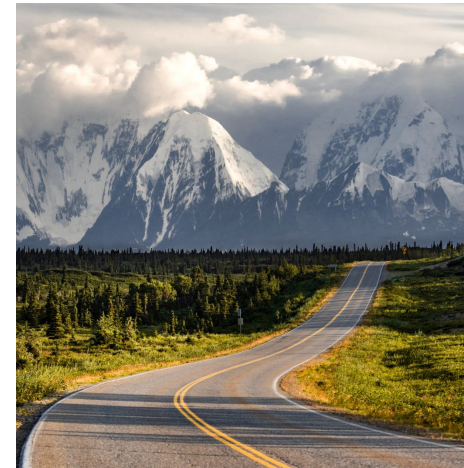


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RESEARCH OBJECTIVES

This report presents the findings of the 2022-2023 Tourism Impact Modeling for Alaska, conducted by Destination Analysts on behalf of the Alaska Travel Industry Association. The 2022-2023 Visitor Profile study of travelers to Alaska was conducted with a primary objective of collecting data to calculate Alaska visitor volume and spending estimates by region and segment.



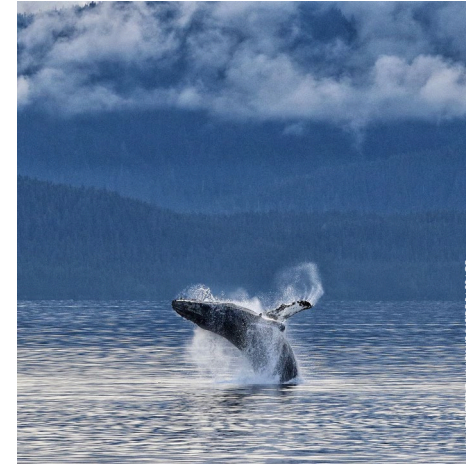
RESEARCH METHODOLOGY

The three components of the 2022-2023 Visitor Profile study included:

1. Intercept survey of visitors to Alaska, collected monthly. Intercept sites included Anchorage, Denali, Fairbanks, Juneau, Kenai Peninsula, and Cordova.
2. Online panel survey of U.S. travelers who visited Alaska.
3. Online survey of Alaska Travel Industry Association partners' owned audiences who visited Alaska.

A total of 4,256 surveys were collected for travel between May 2022 – April 2023. This include 1, 900 intercept surveys, 1,190 panel surveys, and 1,166 partner surveys.

Participants were age 18+ and must have resided outside Alaska. Results were weighted by the volume estimates, as well as origin and destination markets using geolocation data.

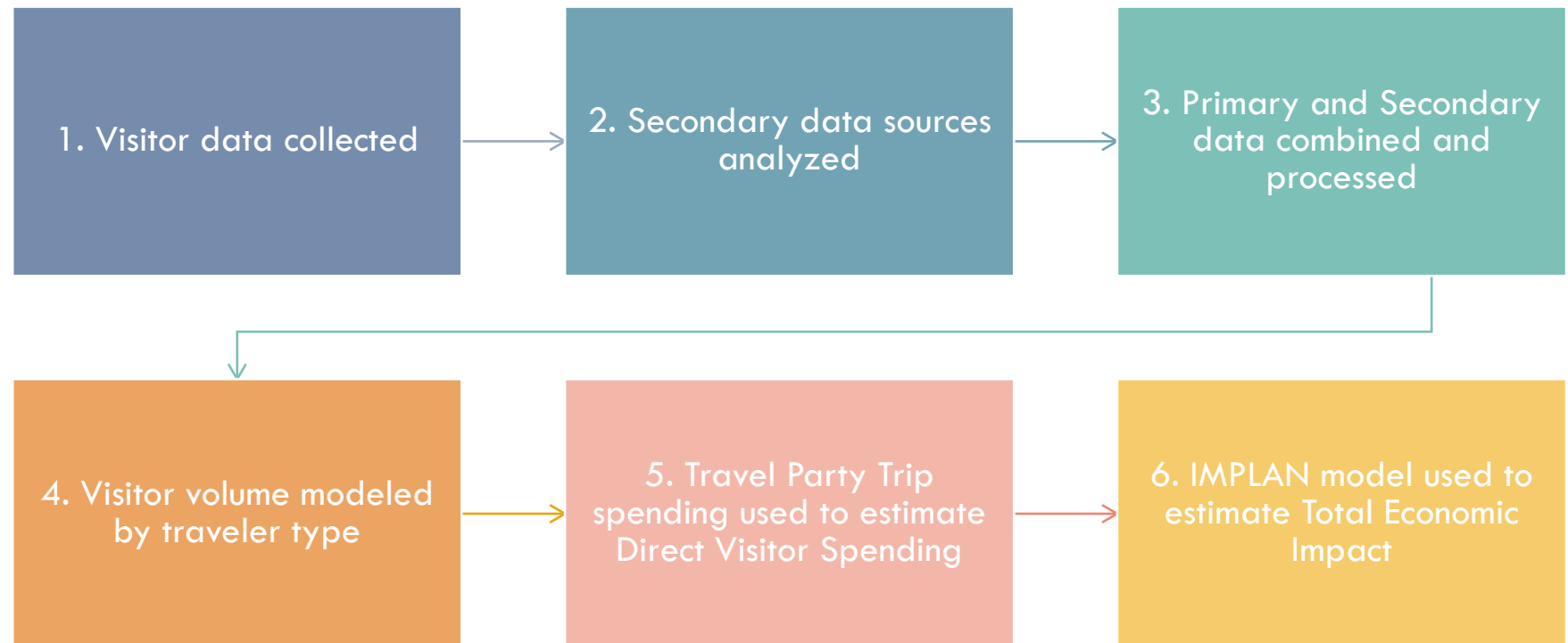


TOURISM IMPACT MODEL



TOURISM IMPACT MODEL *Overview*

The following process was implemented to develop the 2022-2023 Tourism Impact Model for Alaska:



TOURISM IMPACT MODEL *Data Sources*

Visitor Data

Visitor behavior

Lodging Type

Length of Stay

Travel Party Size

Spending In-Market

CLIA Data

Cruise Volume

Round-Trip/Cross Gulf

Seasonality

STR Data

Hotel Occupancy

Hotel ADR

Seasonality

IMPLAN

Input Output Model

Total Economic Impact

Taxes Generated

Jobs Supported

2022-2023 TOURISM IMPACT *Summary*

	Summer (May – Oct 22)	Winter (Nov 22 – Apr 23)	Full Year
Visitor Volume	2,081,624	642,556	2,724,180
Visitor Days	17,856,660	4,609,186	22,465,847
Direct Spending	\$3,091,178,109	\$809,251,132	\$3,905,573,498
Total Economic Impact	\$4,442,788,581	\$1,186,148,040	\$5,632,356,465

2022-2023 TOURISM IMPACT *Year-Over-Year Comparison*

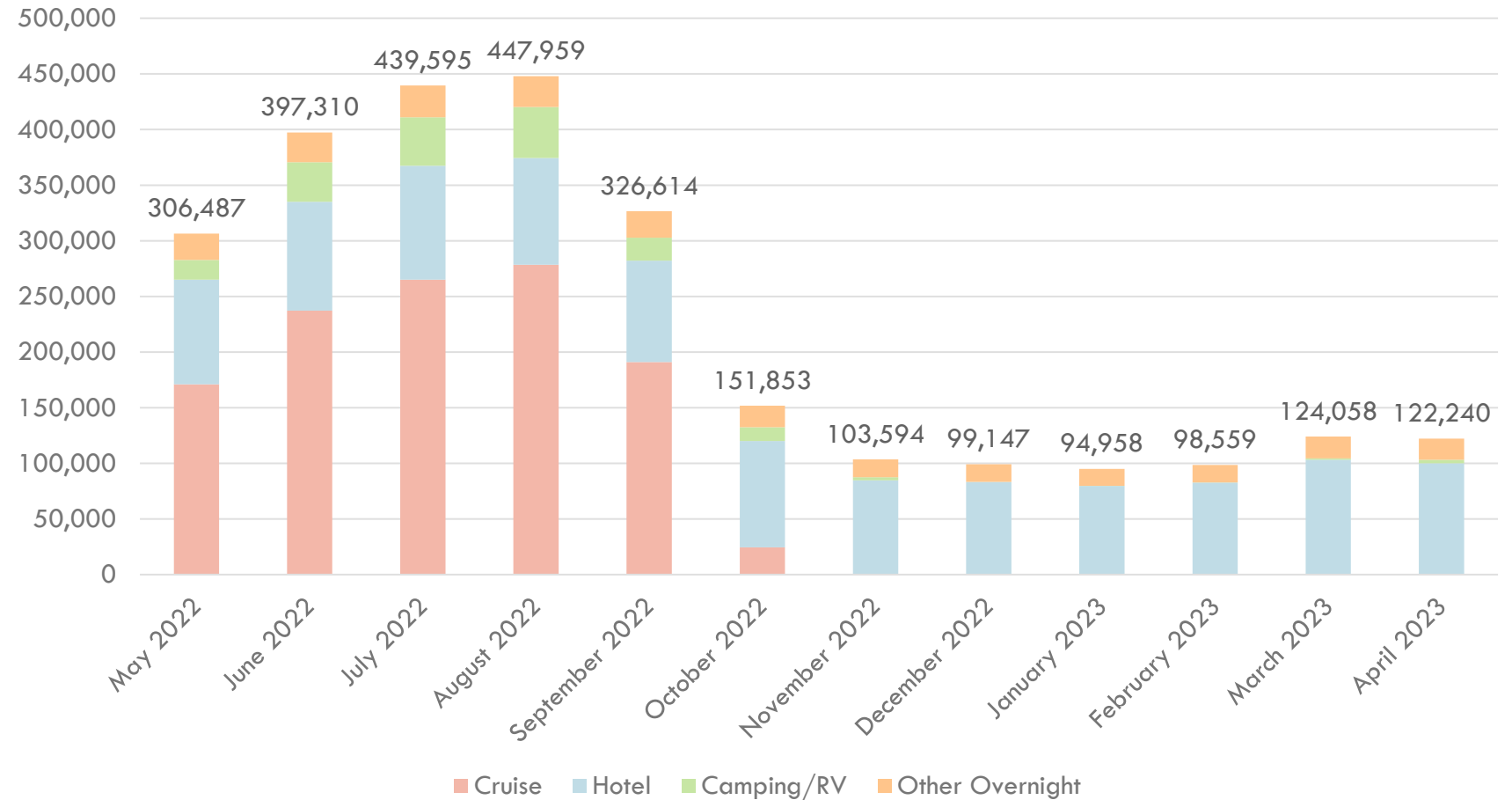
	Summer 2006	Summer 2011	Summer 2016	Summer 2022
Visitor Volume	1,714,100	1,556,800	1,857,500	2,081,624
Average Trip Spending	\$934	\$941	\$1,057	\$1,485
Total Direct Spending	\$1.52 Billion	\$1.51 Billion	\$1.97 Billion	\$3.09 Billion

2022-2023 TOURISM IMPACT

	2022
Direct Tourism Jobs	43,661
Total Payroll	\$1.4 Billion

2022-2023 TOURISM IMPACT *Visitor Volume*

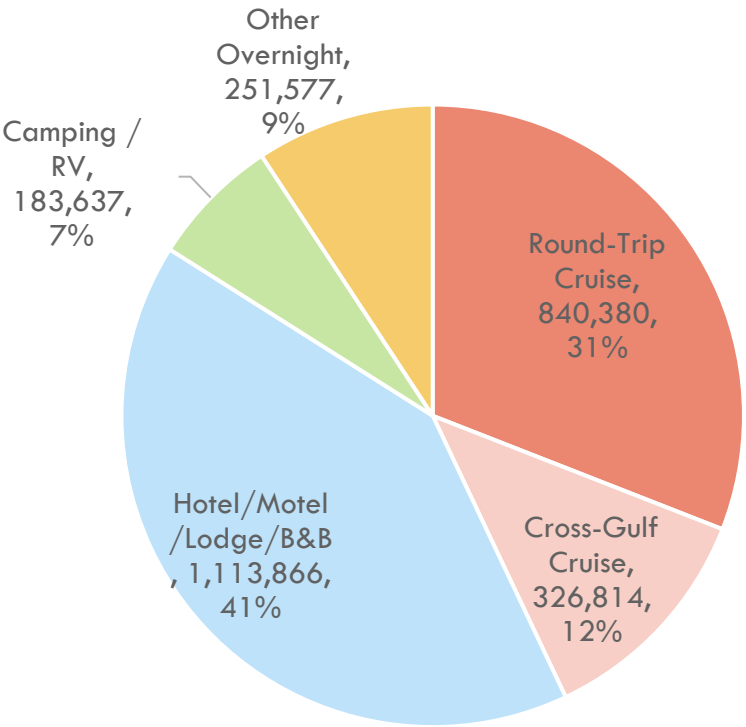
Total Visitor Volume by Traveler Type



2022-2023 TOURISM IMPACT *Visitor Volume By Segment*

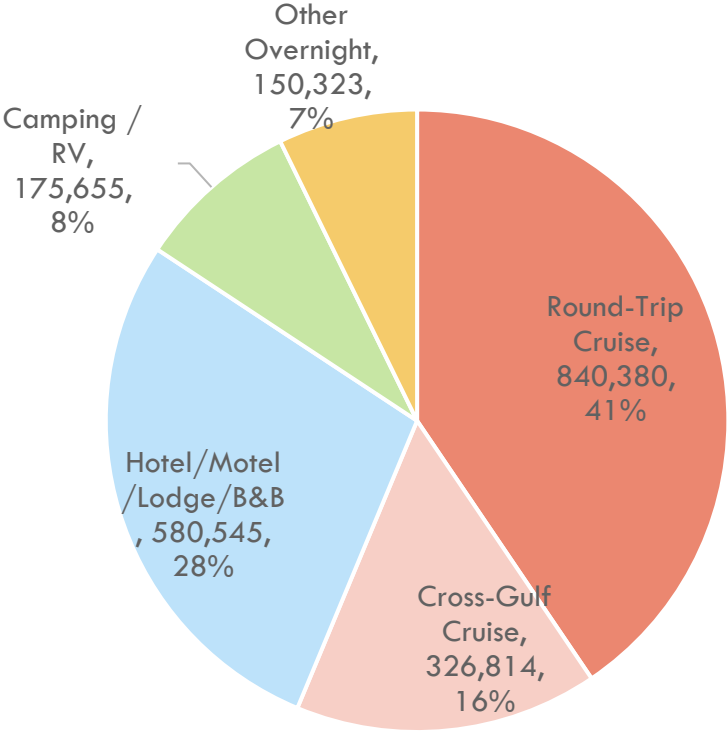
Total Volume

2,724,180



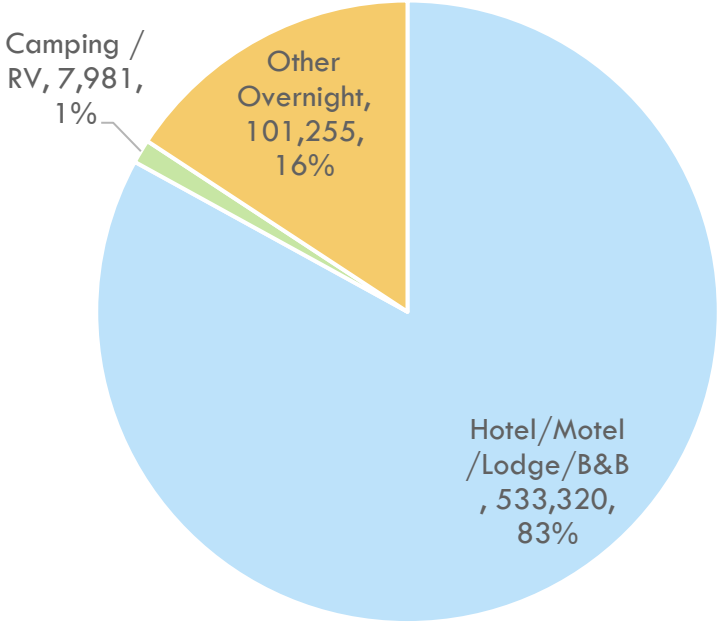
Summer Volume May-Oct

2,081,624

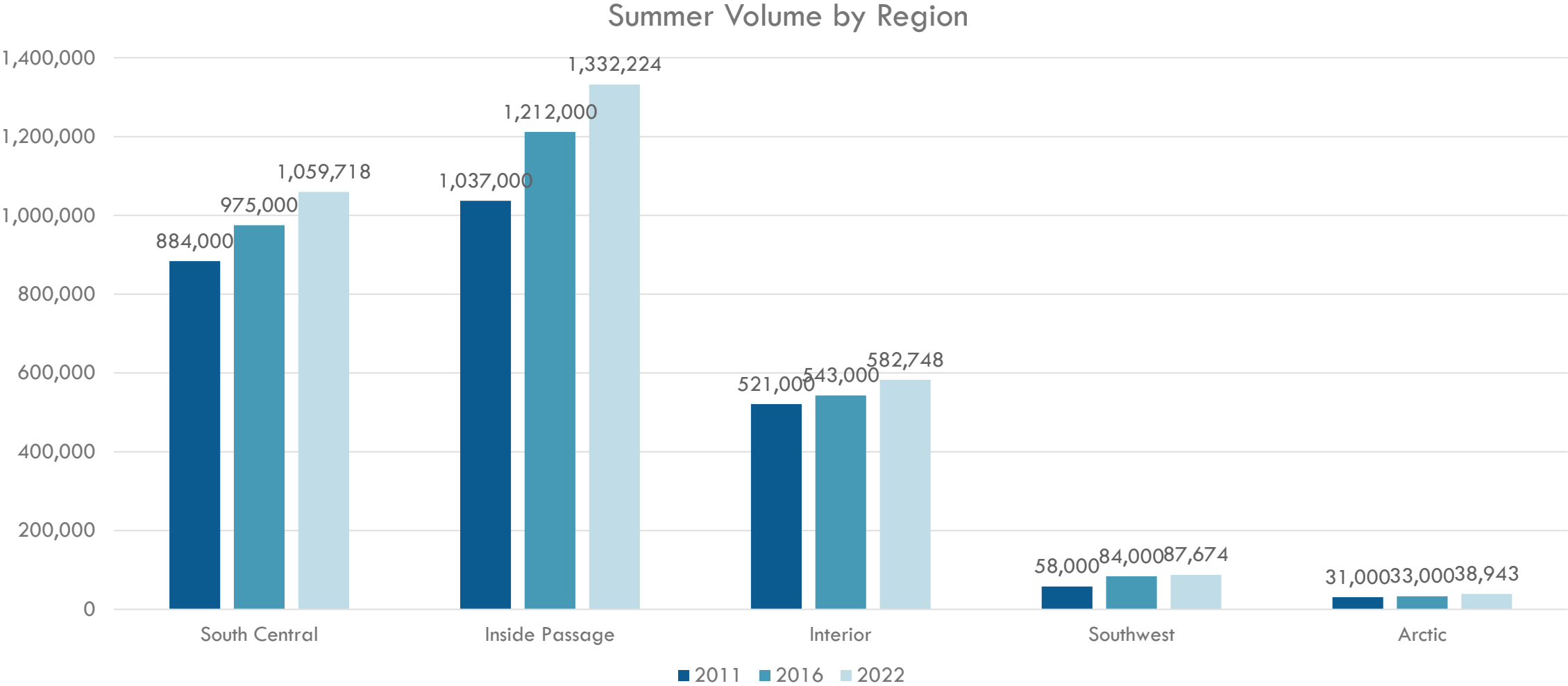


Winter Volume Nov-Apr

642,556

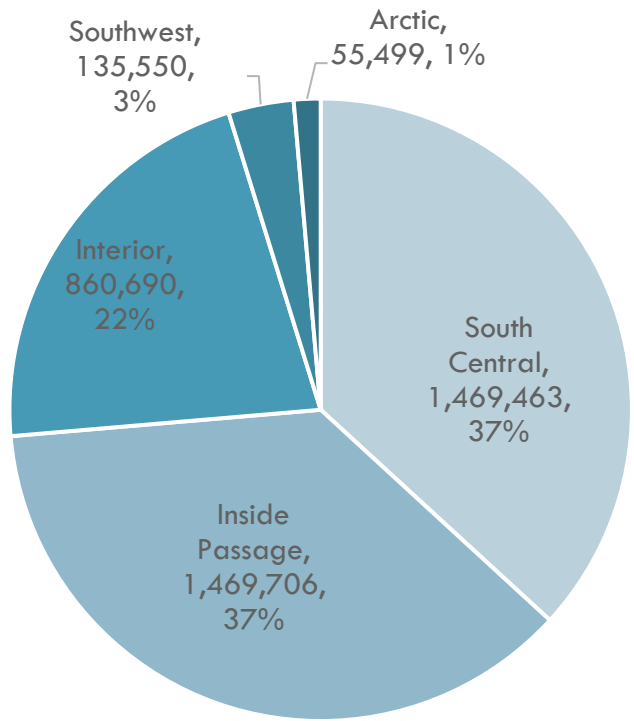


SUMMER REGION VOLUME *Historic Comparison*

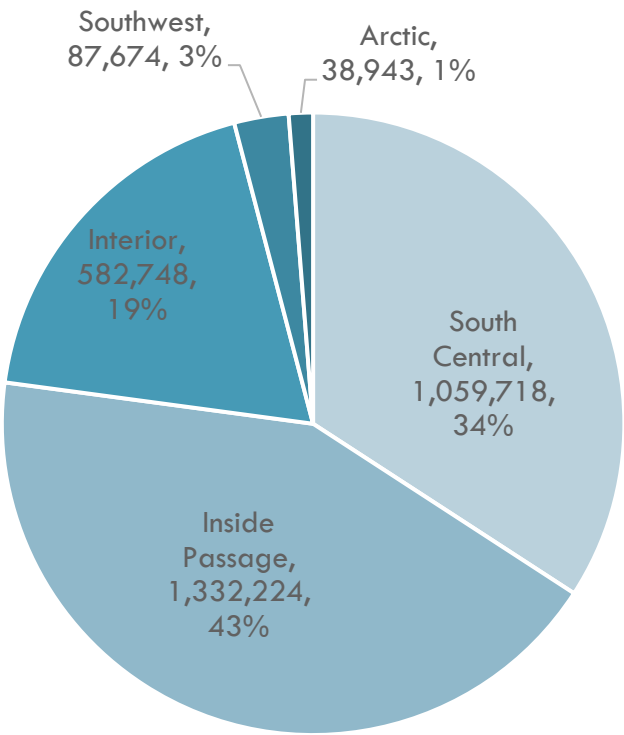


2022-2023 TOURISM IMPACT *Visitor Volume By Region*

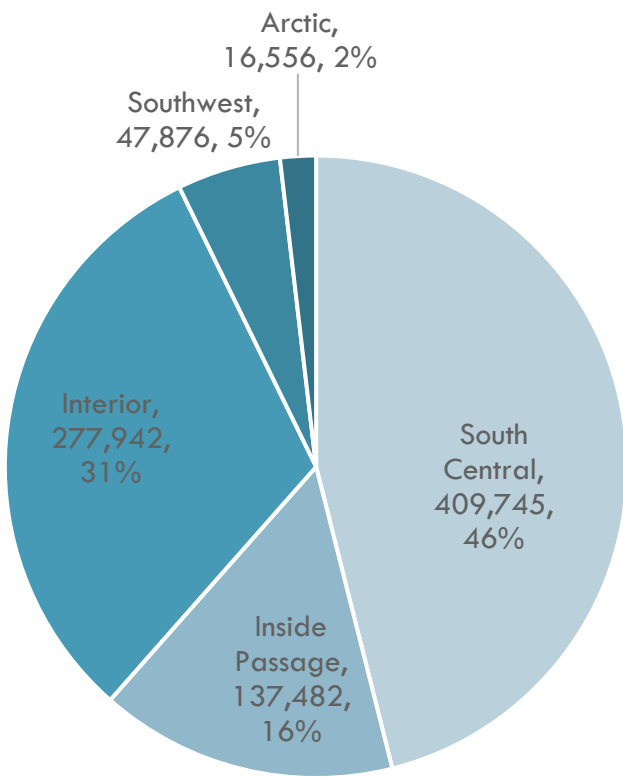
Total



Summer May-Oct

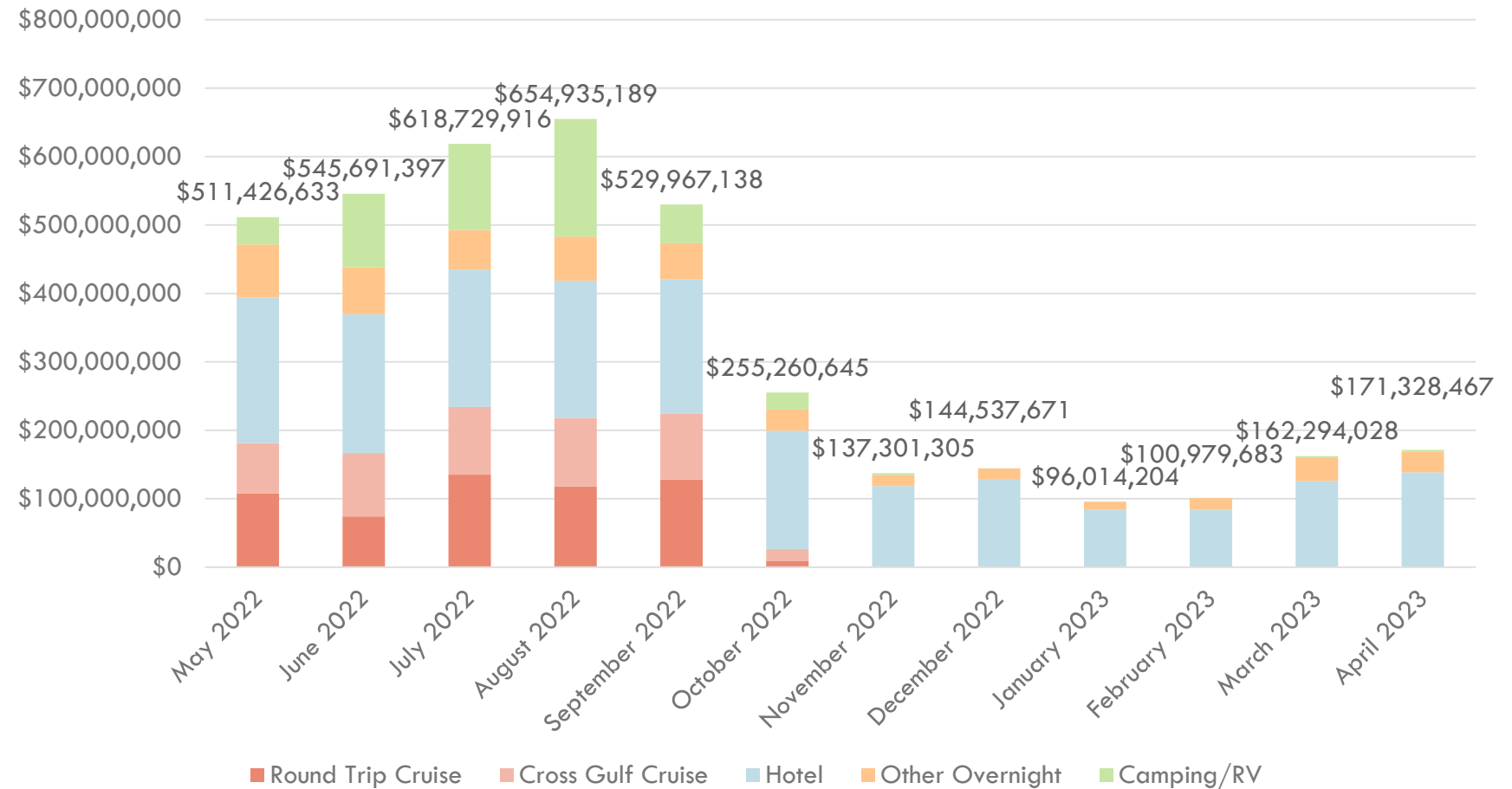


Winter Nov - Apr



2022-2023 TOURISM IMPACT *Direct Spending*

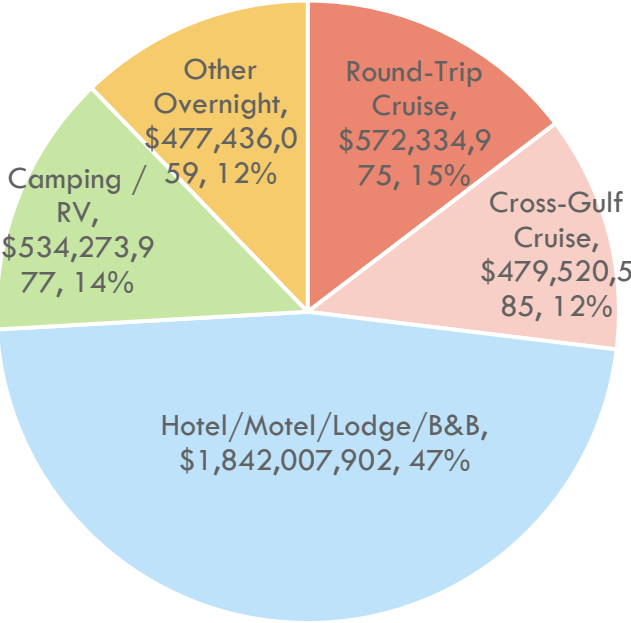
Direct Spending by Traveler Type



2022-2023 TOURISM IMPACT *Direct Spending By Segment*

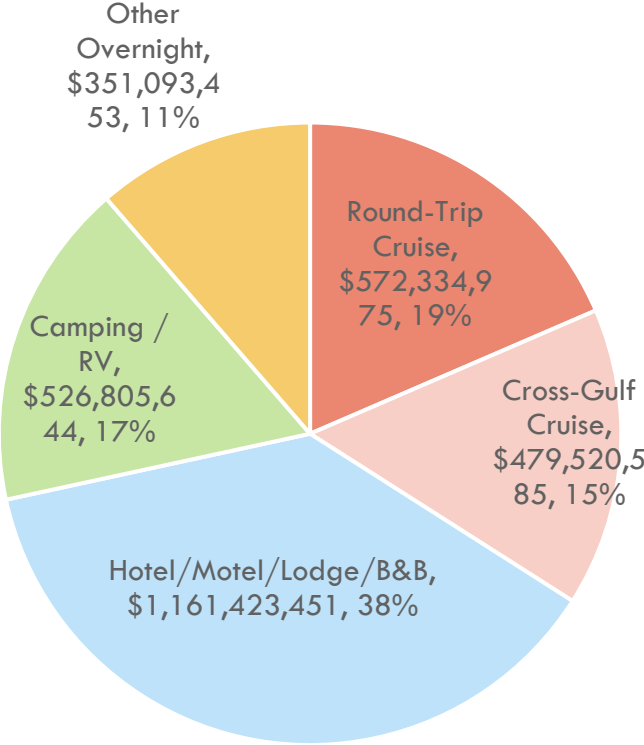
Total Direct Spend

\$3.91 Billion



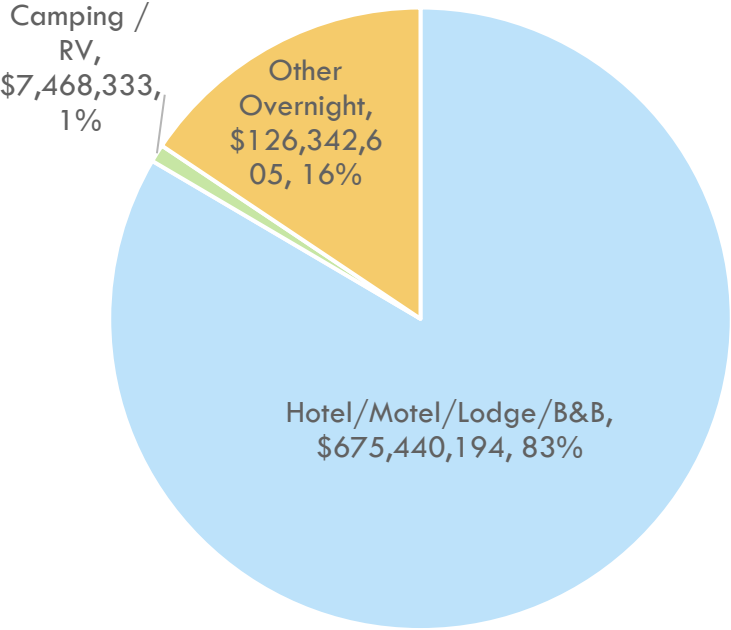
Summer May-Oct

\$3.09 Billion



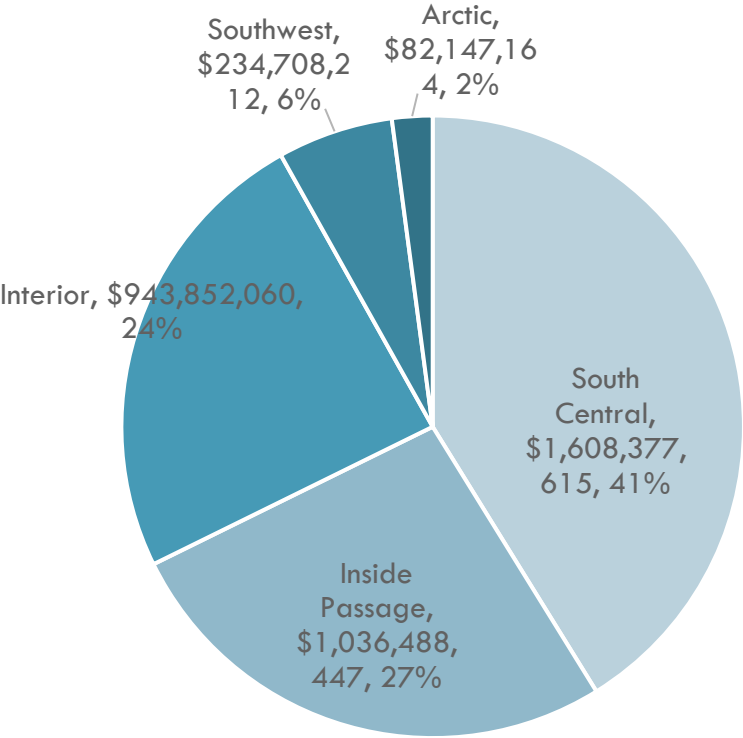
Winter Nov-Apr

\$809.2 Million

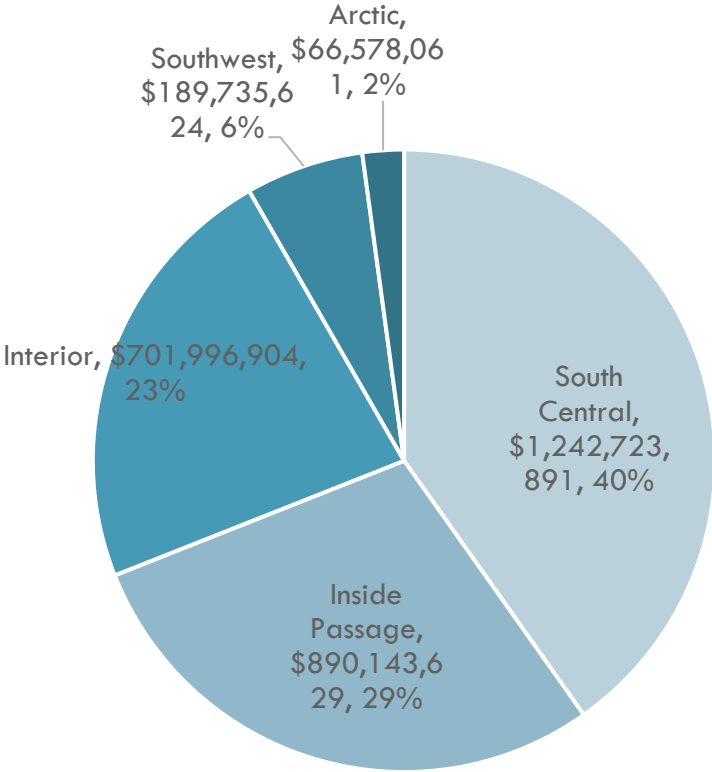


2022-2023 TOURISM IMPACT *Direct Spending By Region*

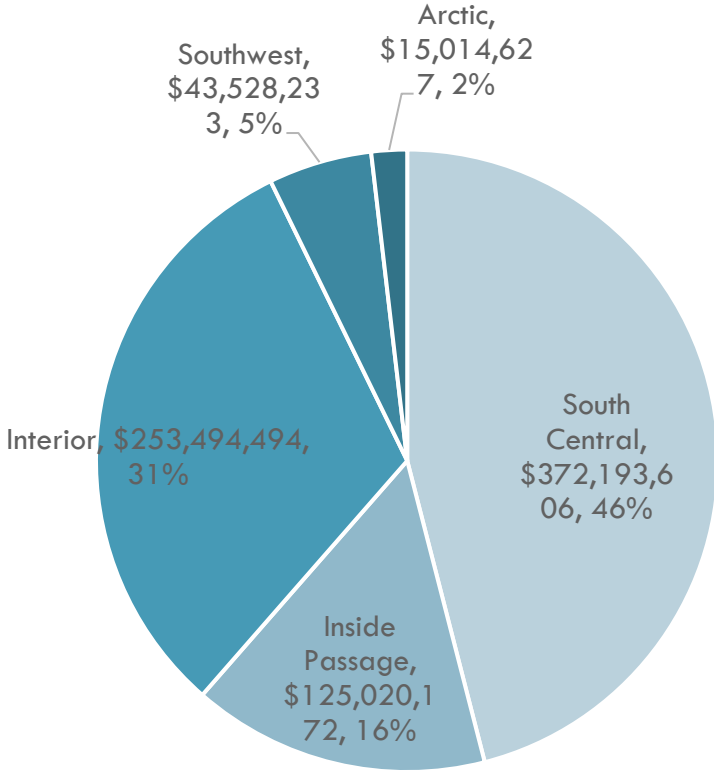
Total



Summer May-Oct



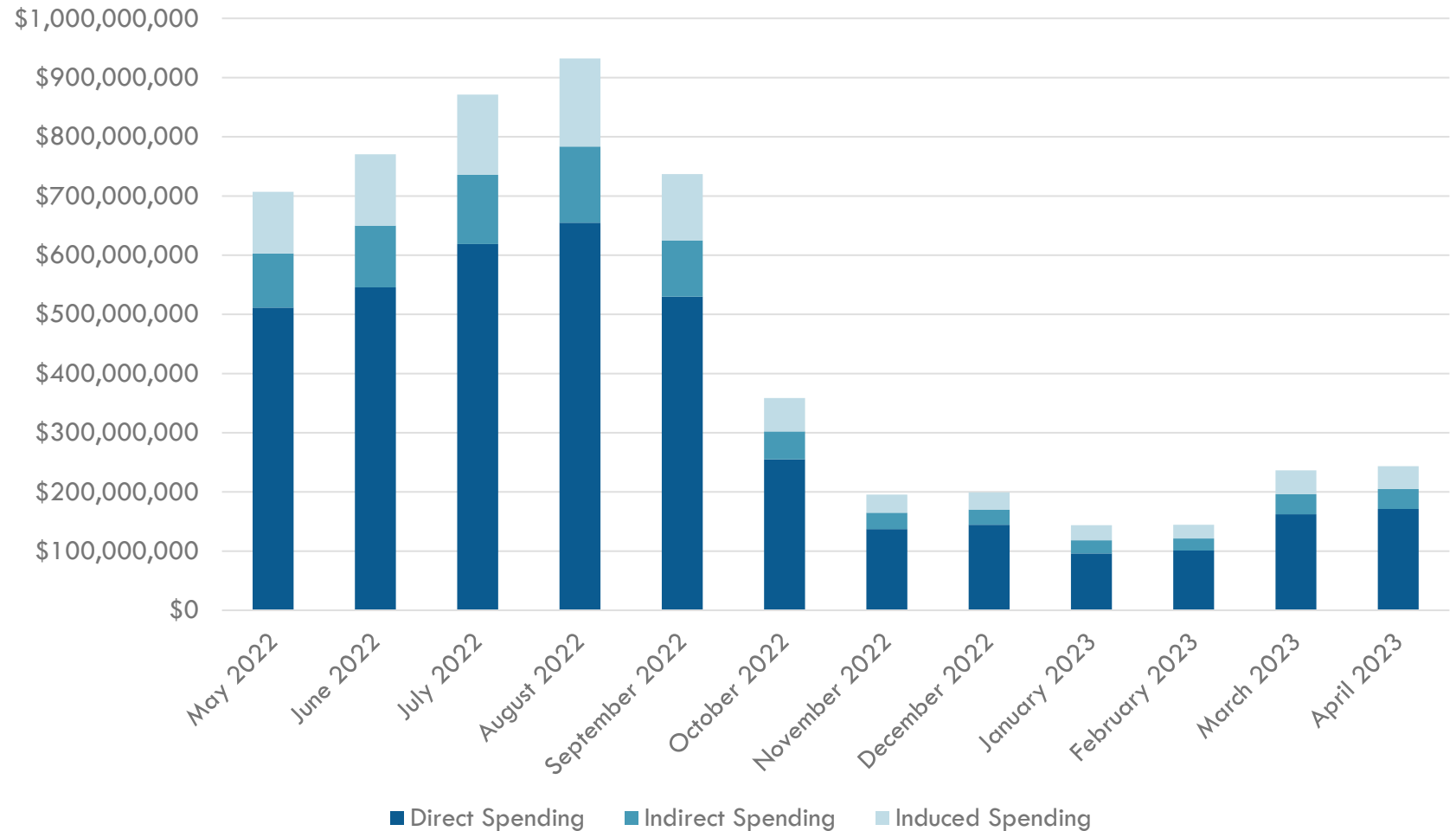
Winter Nov-Apr





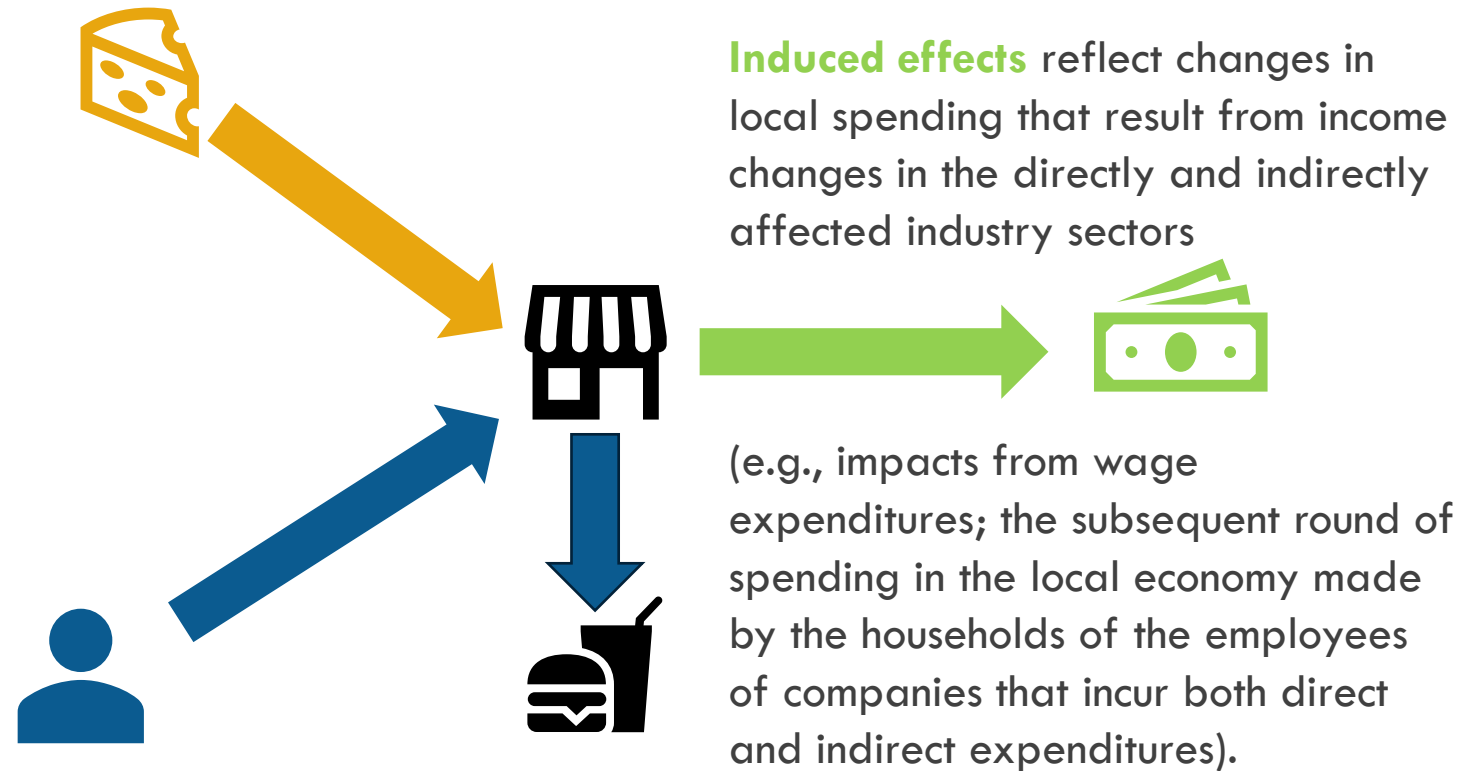
2022-2023 TOURISM IMPACT *Total Economic Impact*

Total Economic Impact by Spending Type



2022-2023 TOURISM IMPACT *Total Economic Impact*

Indirect effects are changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries



Direct Visitor Spending

The injection of money into the local economy that takes place when a visitor purchases any good or service inside Alaska

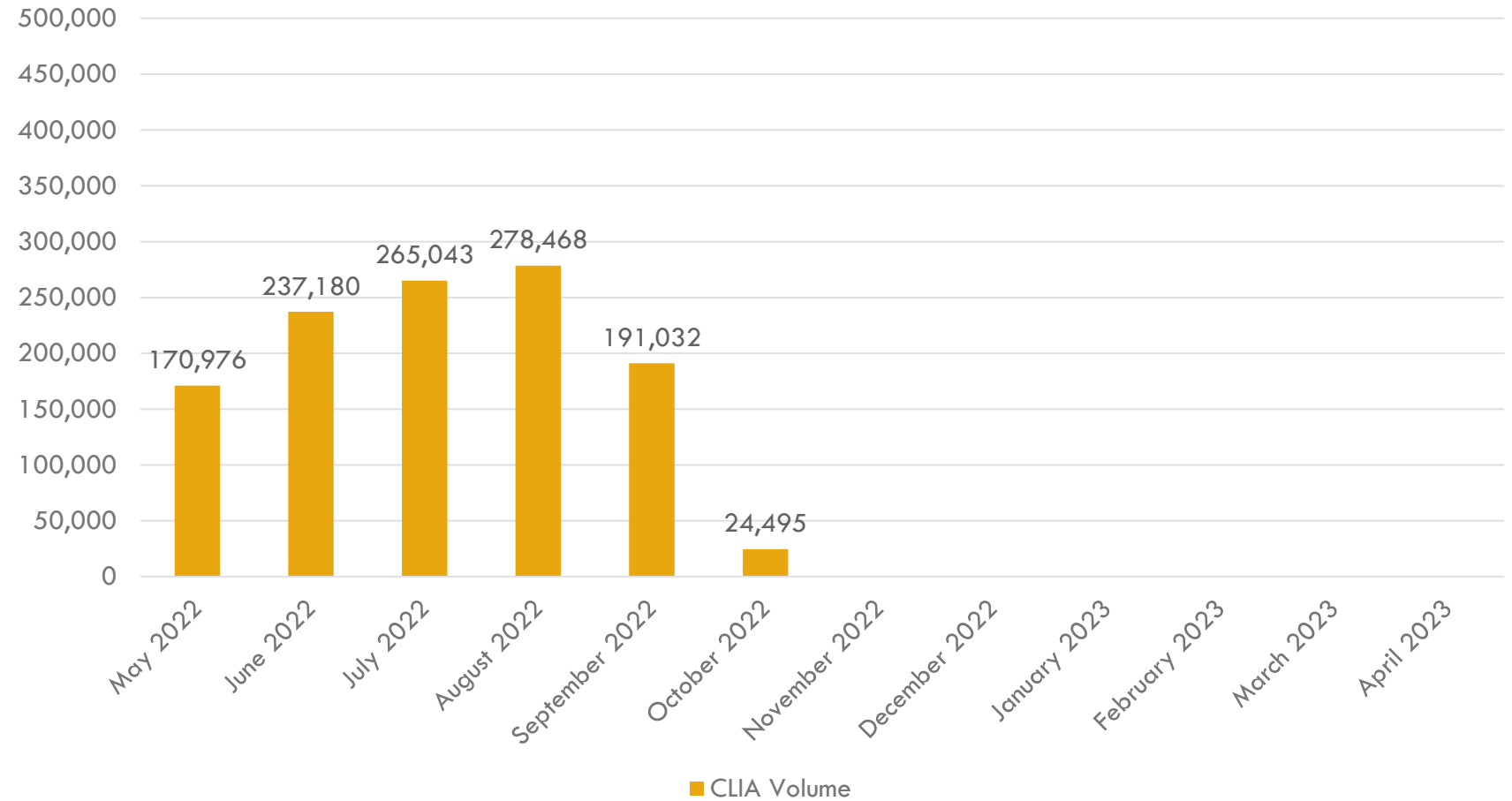
A photograph of three hikers walking across a vast, cracked glacier. The hiker on the left wears a red jacket and an orange helmet. The hiker in the middle wears a purple jacket and a red helmet. The hiker on the right wears a green jacket and a blue helmet, and is pointing towards the glacier's edge. The glacier is a massive wall of white and blue ice with dark crevasses. A body of water is visible in the background to the right.

APPENDIX: SECONDARY DATA

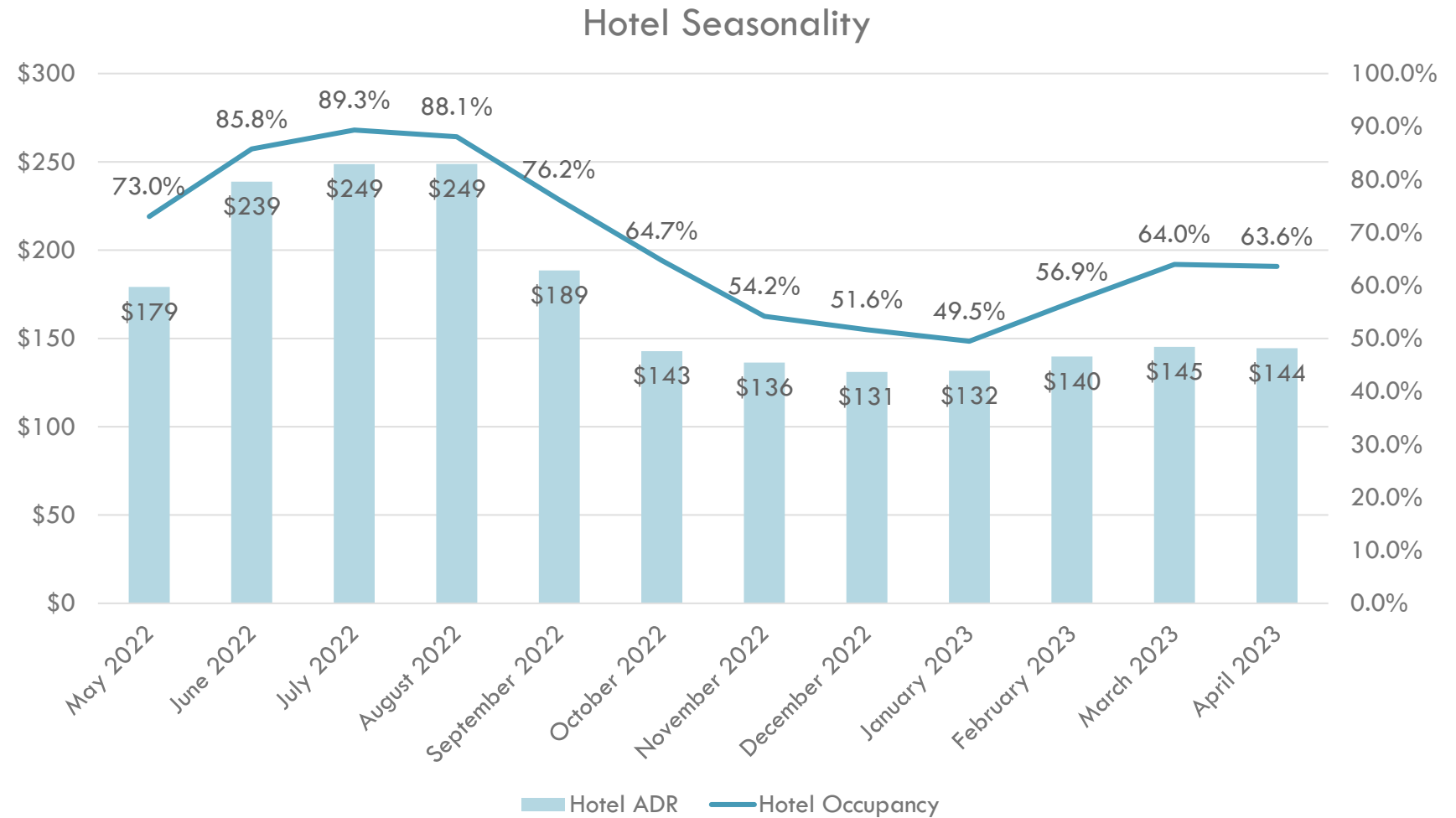


CRUISE REPORTED DATA *Seasonality*

Cruise Seasonality



HOTEL REPORTED DATA *Seasonality*

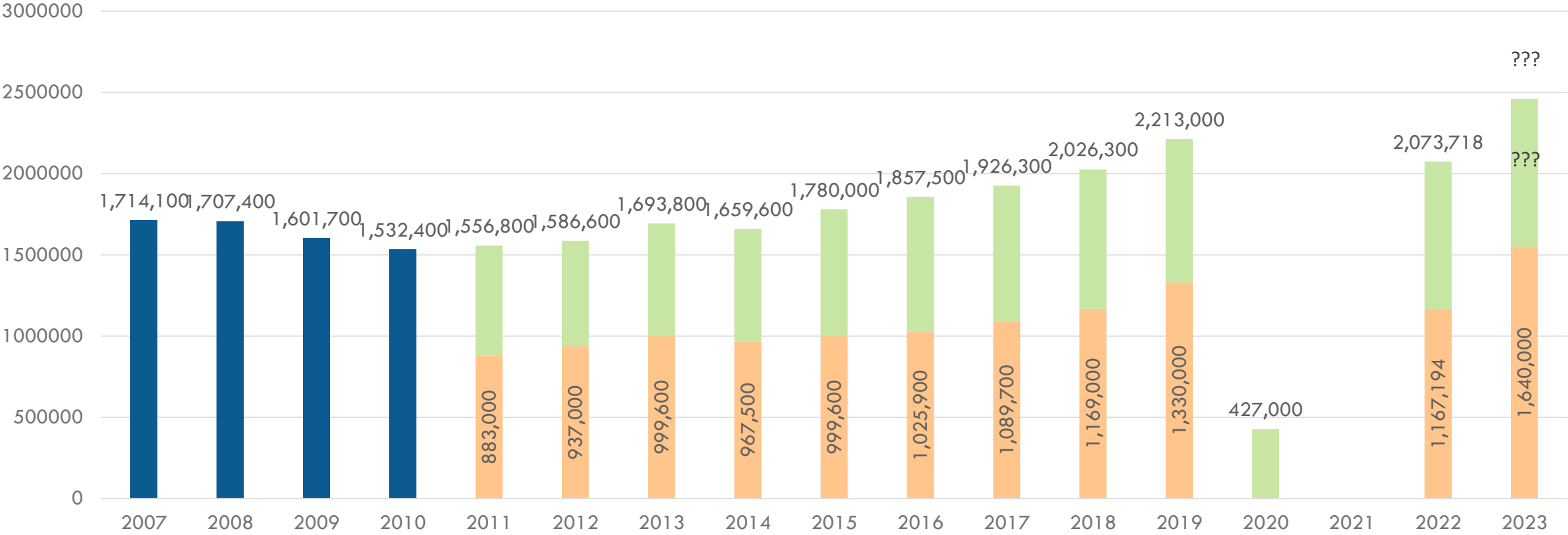


A person in a dark winter coat stands in a snowy, forested landscape at night, looking up at a vibrant aurora borealis (Northern Lights) display. The aurora shows green and yellow-green hues against a dark sky filled with stars. The trees in the foreground are heavily covered in snow.

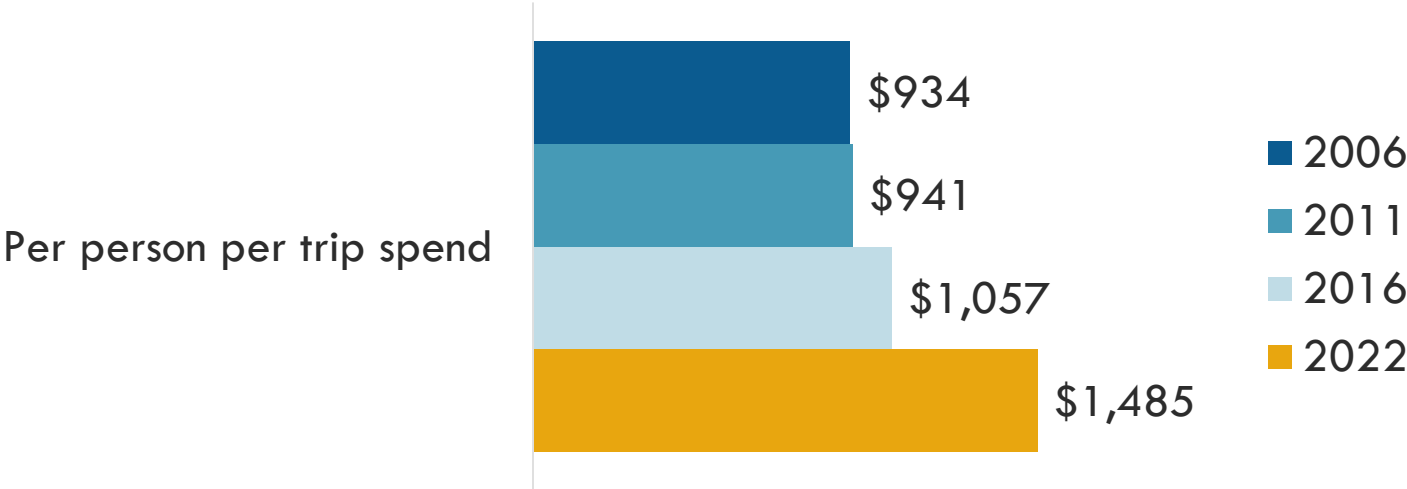
APPENDIX: HISTORIC COMPARISONS

SUMMER VOLUME *Historic Comparison*

Cruise Non-Cruise



SUMMER PER PERSON PER TRIP SPEND *Historic Comparison*

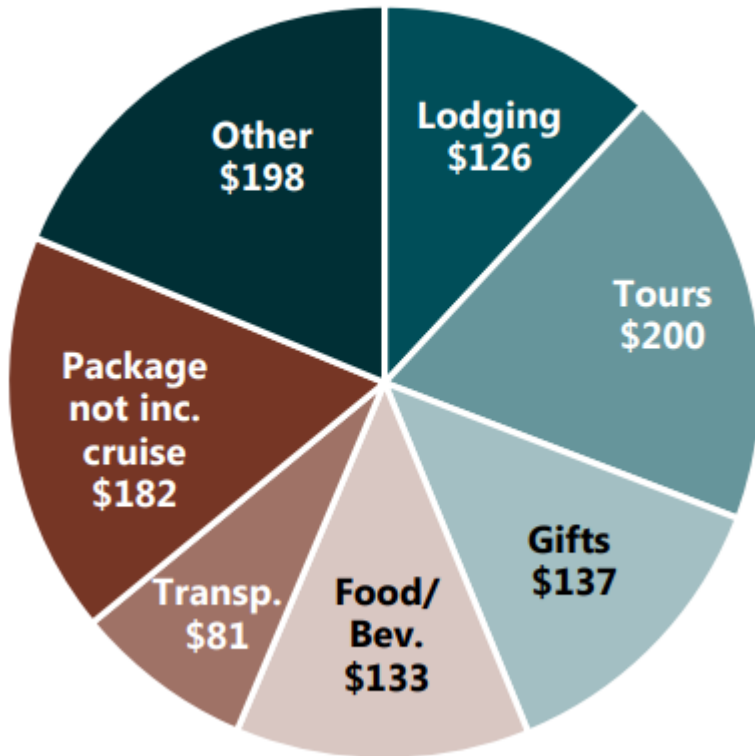


	Cruise			
	2006	2011	2016	2022
Average per person, per trip	\$636	\$632	\$624	\$874

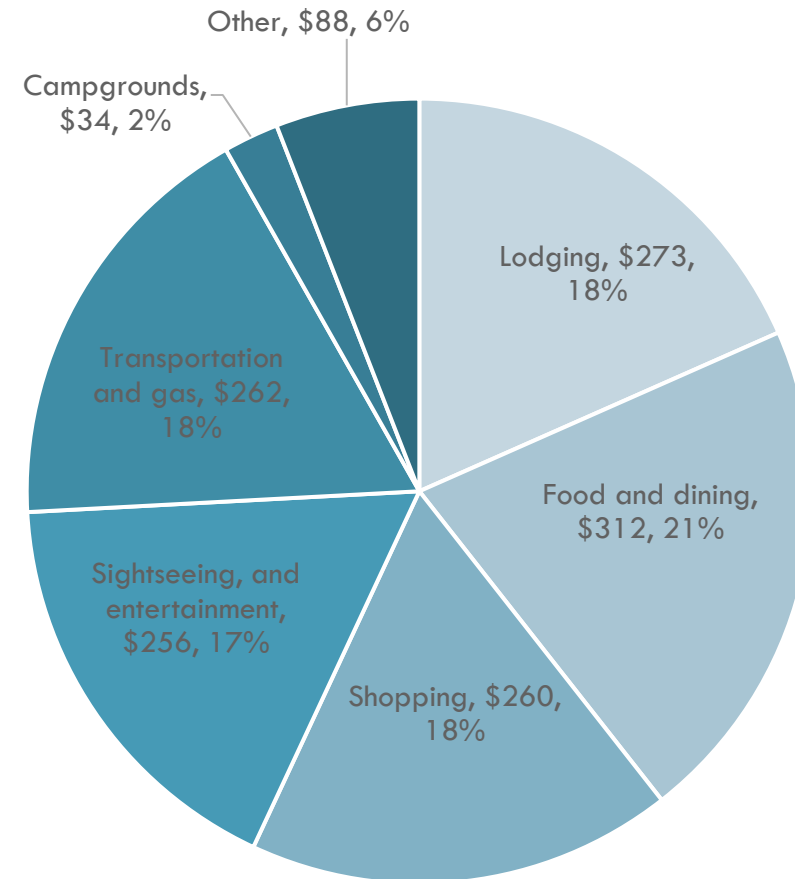
Question: PER DAY, approximately how much will you spend on each of the following? Base: Total, 3,164 respondents. Trip spending for Cruise and Group visitors only reflects spending reported on land within the State of Alaska and thus is calculated based on reported last excursion days and spending on days reported pre/post cruise or group.

SUMMER PER PERSON PER TRIP SPEND *Historic Comparison*

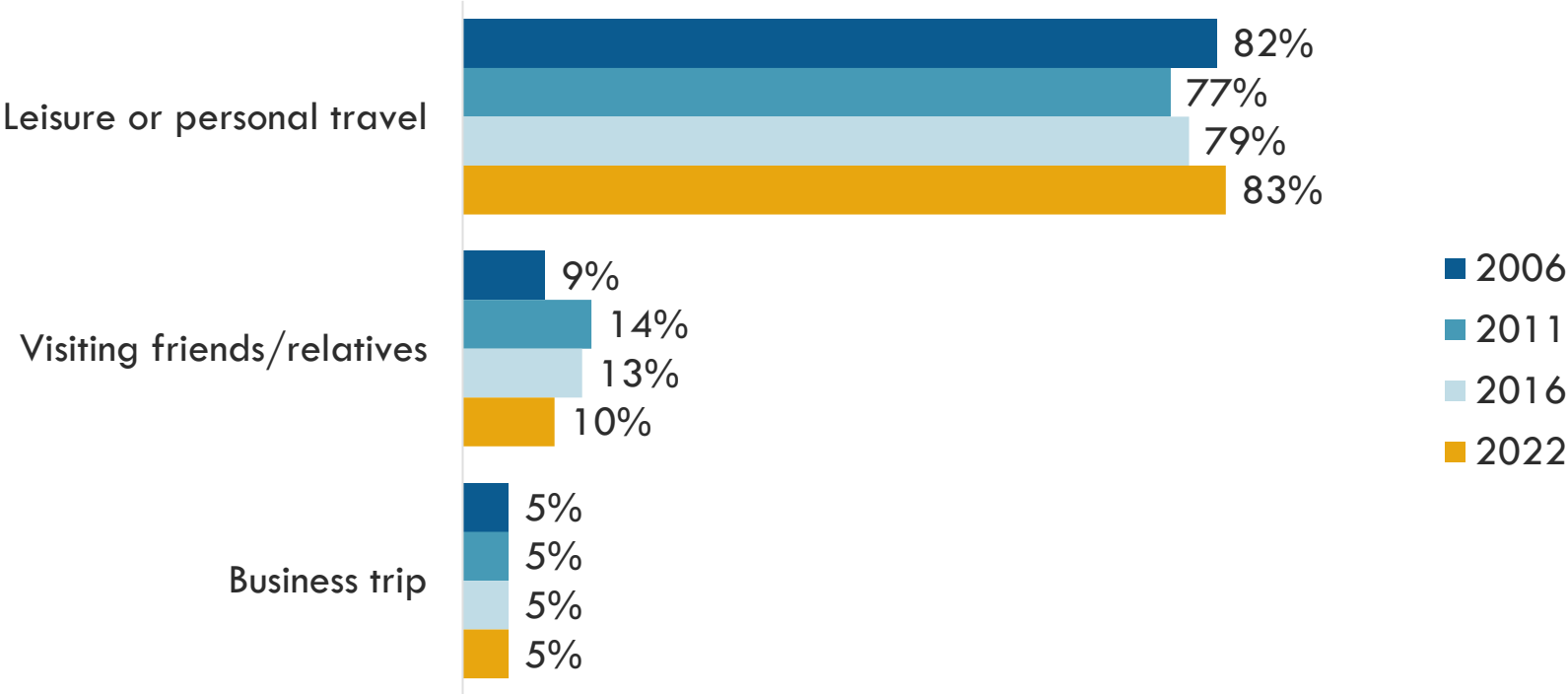
CHART 1.16 – Average Visitor Spending, Per Person, By Category, 2016



2022 Summer Share of Wallet



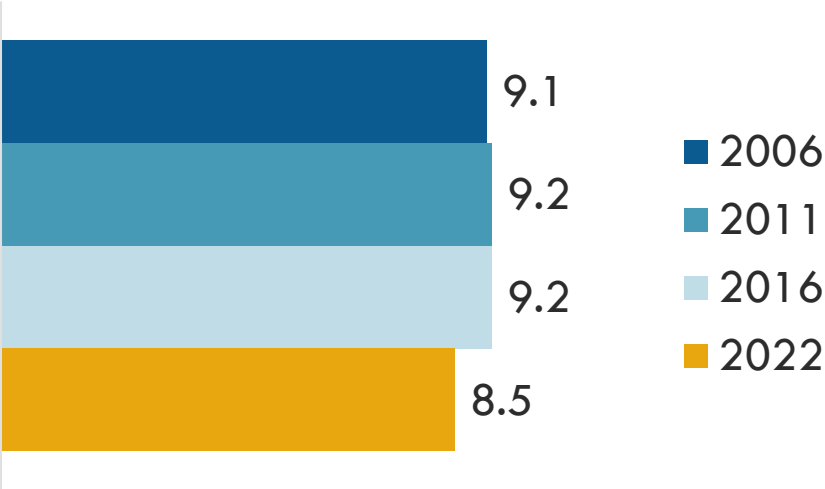
SUMMER PRIMARY PURPOSE OF TRIP *Historic Comparison*



Question: What best describes the purpose of your trip to Alaska? Base: Total, 3,333 respondents.

SUMMER LENGTH OF STAY – NIGHTS *Historic Comparison*

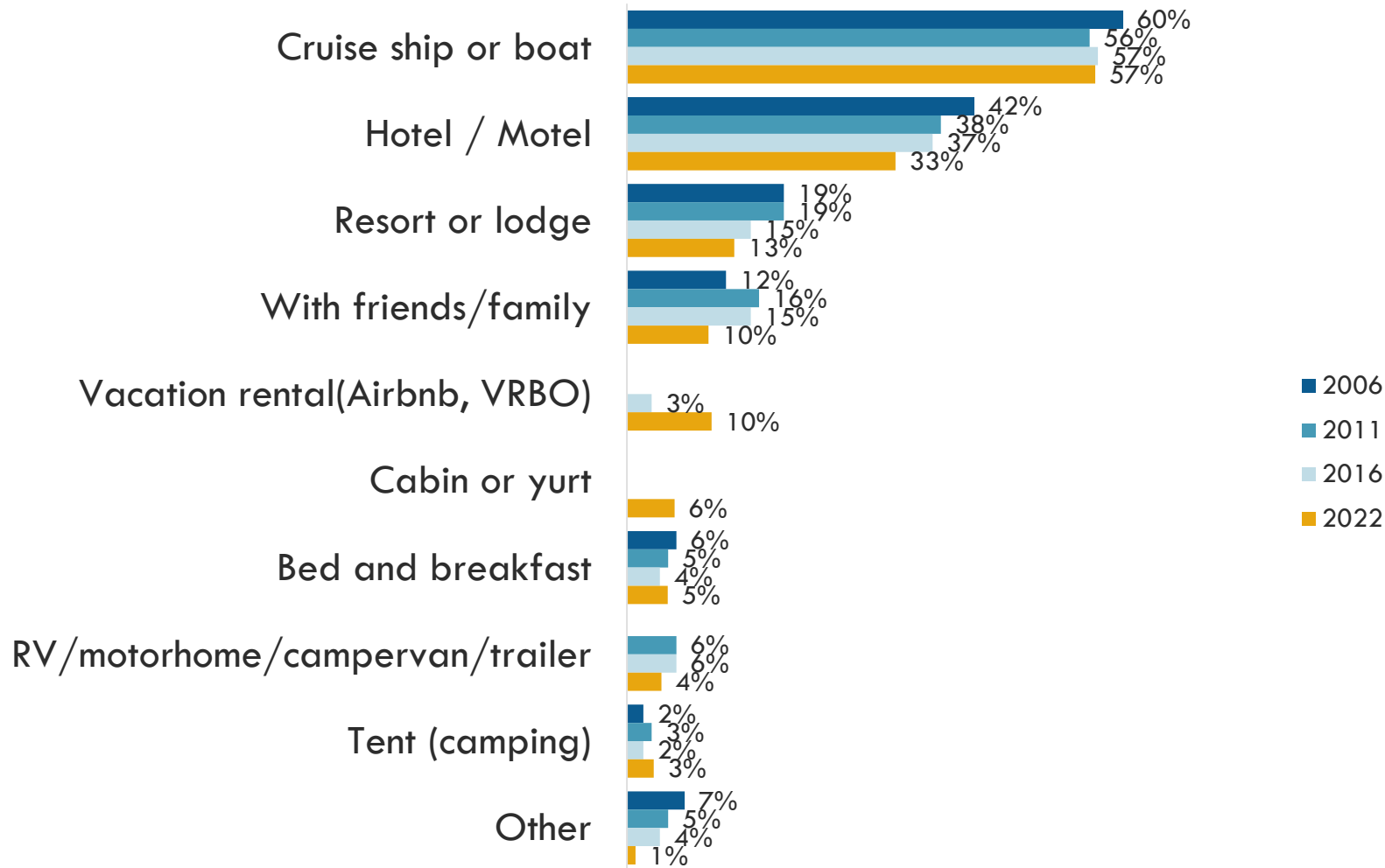
Average length of stay in Alaska



	Cruise			
	2006	2011	2016	2022
Average number of nights	8.1	8.5	8.4	7.5

Base: Total, 3,259 respondents.

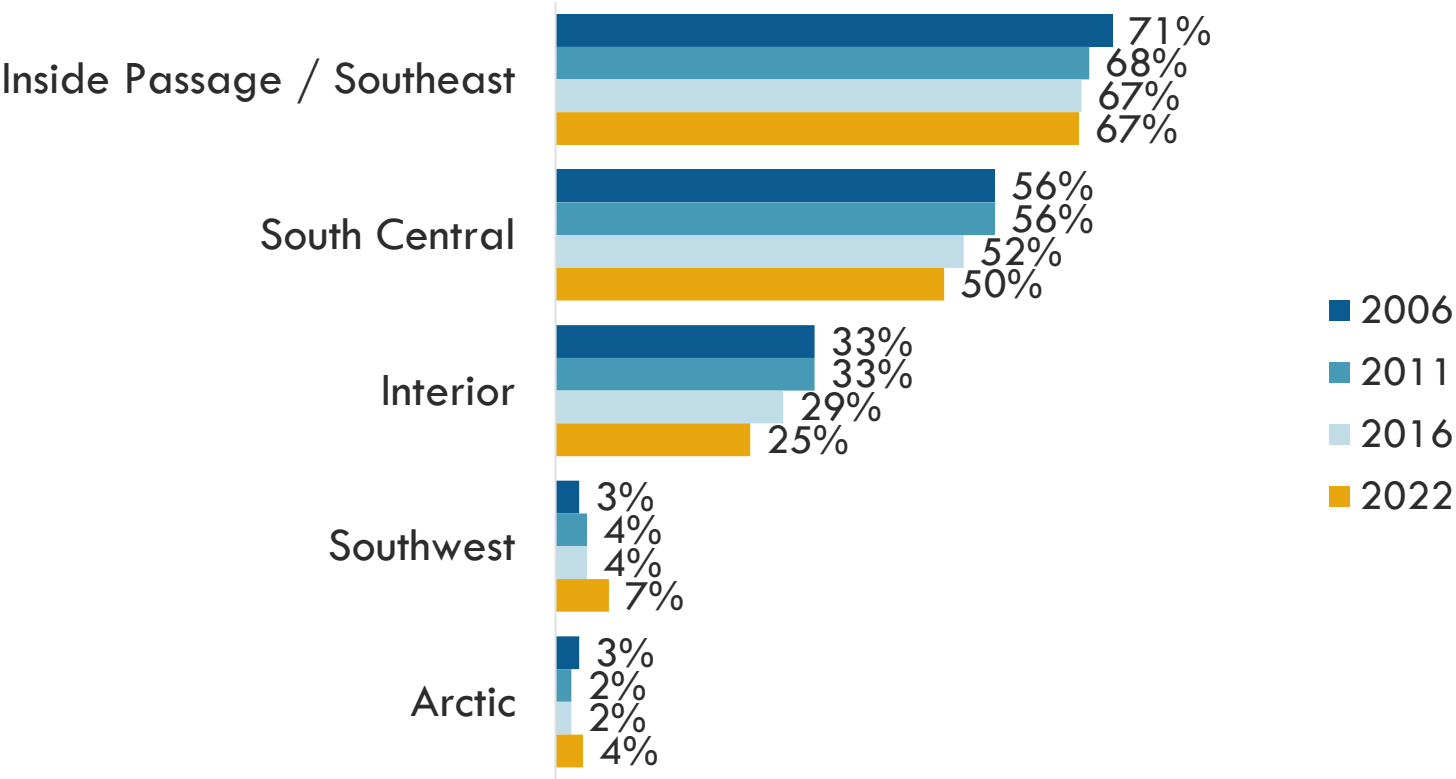
SUMMER ACCOMMODATION TYPE *Historic Comparison*



Cruise		
	2016	2022
Cruise ship or boat	100%	100%
Hotel / Motel	25%	15%
Vacation rental (Airbnb, VRBO)	<1%	3%
With friends/ family	<1%	1%
Resort or lodge	12%	9%
Cabin or yurt	-	1%
Bed and breakfast	1%	2%
RV/ motorhome/ campervan/ trailer	<1%	1%
Tent (camping)	<1%	1%
Other	<1%	0%

Question: What types of lodging did you/will you stay in on this trip? Select all that apply. Base: Total, 3,328 respondents.

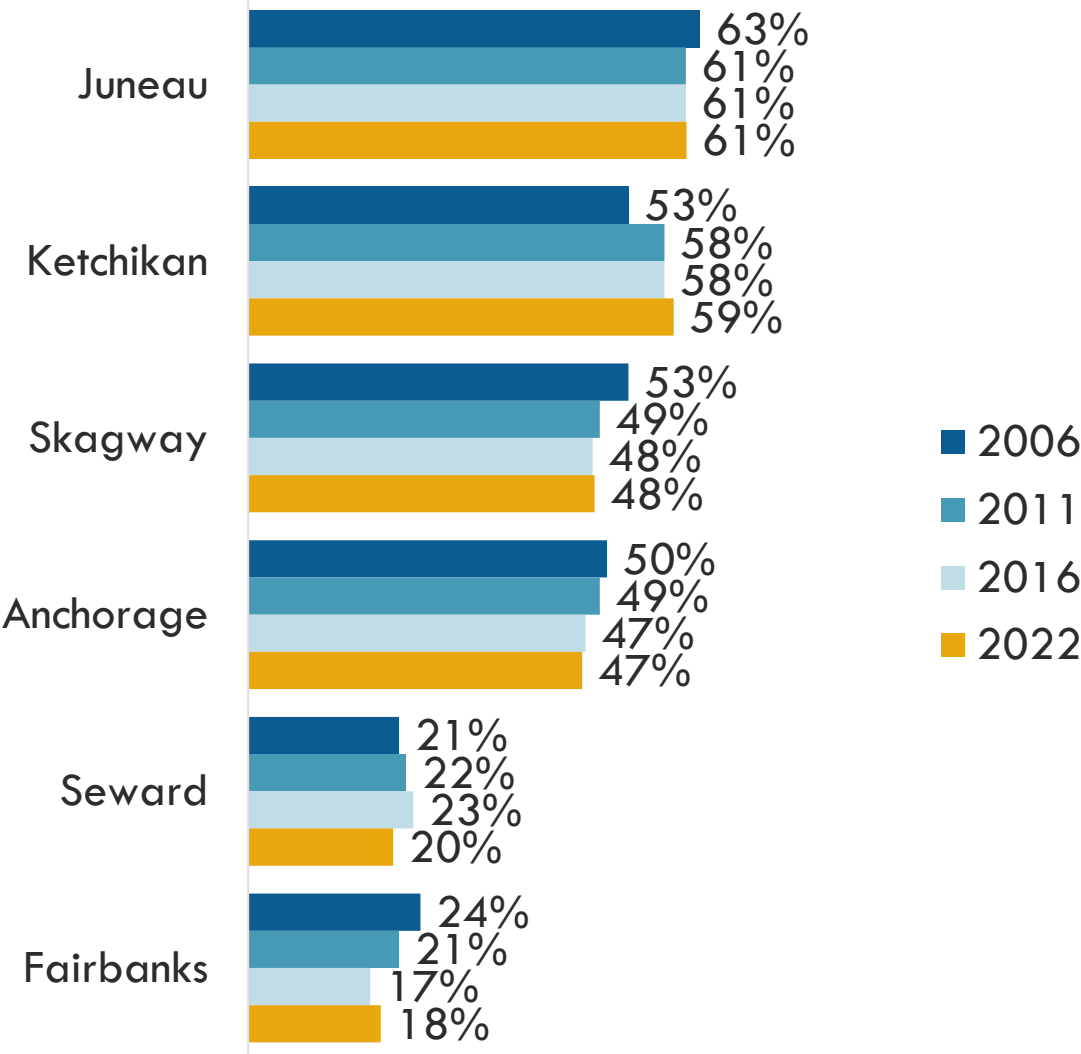
SUMMER AREAS VISITED *Historic Comparison*



Cruise				
	2006	2011	2016	2022
Inside Passage	99%	99%	100%	100%
South Central	42%	41%	34%	27%
Interior	27%	30%	21%	10%
Southwest	1%	2%	1%	2%
Arctic	1%	1%	< 1%	1%

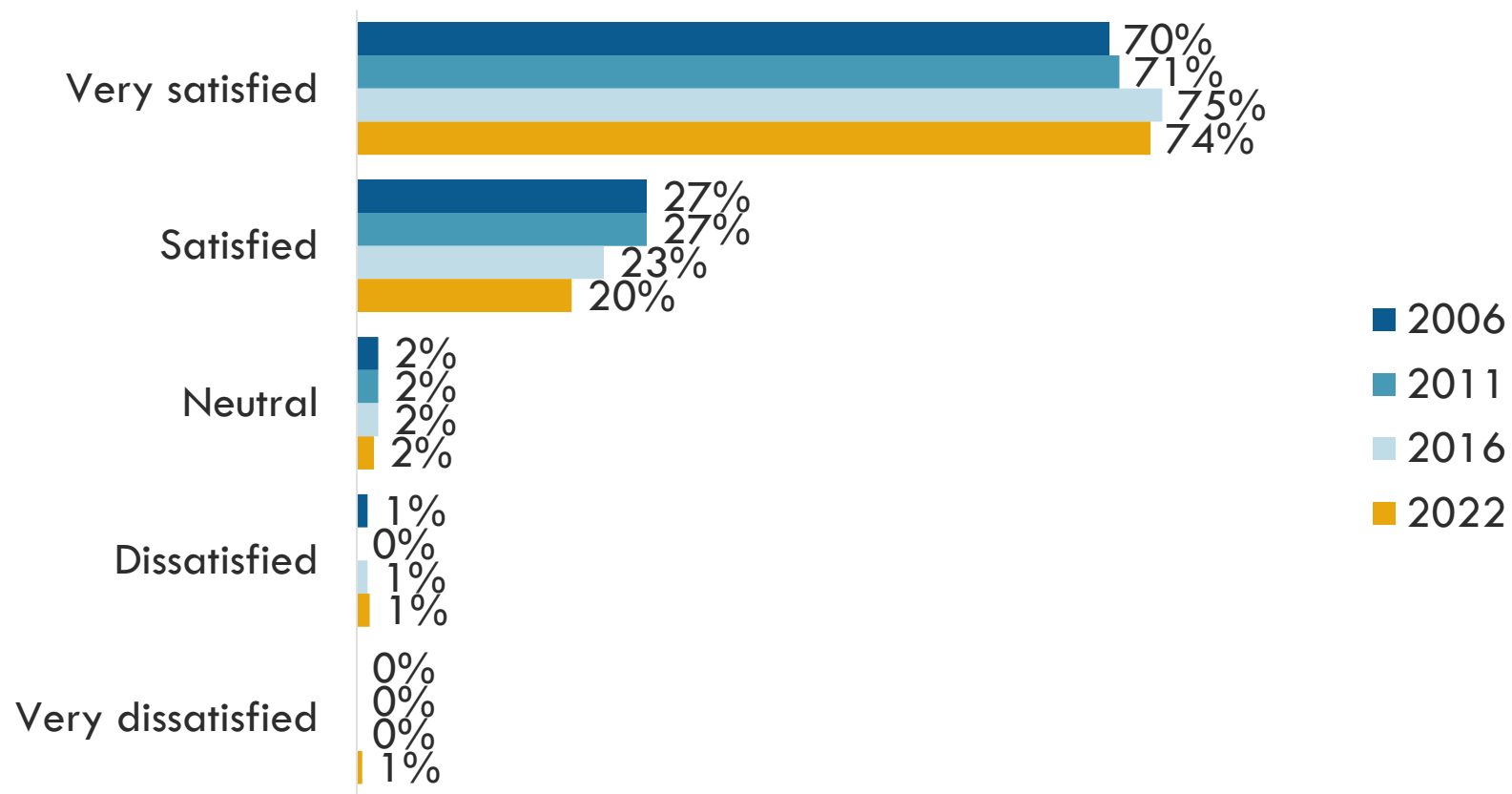
Question: How many nights did you stay/are you staying in each region on this trip? Base: Total, 3,259 respondents.

SUMMER AREAS VISITED *Historic Comparison*



Question: What areas have you visited/are you planning to visit on this trip? Select all that apply. Base: Total, 3,328 respondents.

SUMMER SATISFACTION – OVERALL TRIP *Historic Comparison*

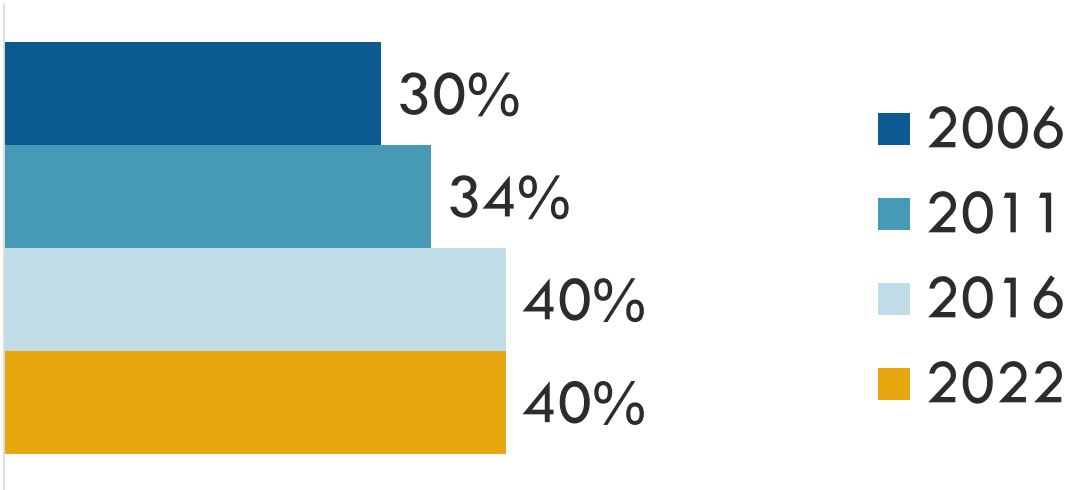


Question: How satisfied are you with... Base: Total, 3,293 respondents.

SUMMER FIRST TIME VS REPEAT VISITATION *Historic Comparison*

FIRST TIME VS REPEAT VISITATION (SUMMER)

Been to Alaska before



Question: Is this your first visit to Alaska as an adult (after age 18)? Base: Intercept, 1,295 respondents.