

Economic Impact of the Ted Stevens Anchorage International Airport

Prepared for:
AEDC



Research-Based Consulting

Juneau
Anchorage

January 2012

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Summary of Key Findings

The Ted Stevens Anchorage International Airport (ANC) is an important contributor to the Anchorage and Alaska economy. The airport serves as a critical link in passenger and cargo transport between Alaska communities and the U.S. It plays an important global role supporting the movement of air cargo between North America and Asia, as well as other international destinations. Air cargo trends at ANC are often a good indicator of the ebbs and flows of the global economy, particularly the trade flows between North America and Asia. ANC also supports economic activity generated by these air linkages, including airline, air services, wholesale and retail trade, transportation, utilities, hospitality, construction, and professional services sectors. Important governmental services are also provided at ANC, including national security and border control. To better understand the economic impact of ANC, the Anchorage Economic Development Corporation (AEDC) contracted with McDowell Group to conduct a study of ANC and its role in Anchorage's economy in fiscal year (FY) 2011 (July 2010 – June 2011).

Following is a summary of key findings.

Overview of ANC

- ANC encompasses 4,837 acres, including three runways and the adjacent Lake Hood Seaplane Base (LHD) and Lake Hood Strip (Z41) general aviation airports. It also comprises:
 - 500 floatplane slips and 500 wheeled airplane tiedowns
 - Two terminal buildings (North and South)
 - Rental Car Center
 - Alaska Railroad Train Depot
- Along with the airport administration (Alaska Department of Transportation & Public Facilities), approximately 265 businesses or agencies lease (or sublease) space at ANC. These tenants provide services directly to the airport and its operation, or provide goods and services that primarily serve air passengers or air cargo clients. Tenants include:
 - Air service companies (more than 35 regional and small carriers)
 - Airlines (about 45 large air carriers, both all-cargo and passenger service)
 - Airport operations and support (about 40 businesses providing services to the airport and airlines)
 - Logistics and freight forwarders (at least 10 companies)
 - Car rental and parking services (about 15 companies)
 - Government agencies, including local, state and federal
 - Associations, tour companies, and cultural attractions
 - Retail operations and service providers (approximately 80 businesses)

Economic Impacts

Employment and Earnings

- An estimated 9,123 employees work directly for ANC (such as ANC's administrative staff) or businesses or entities located at ANC. These employees earned \$724 million in earnings in FY 2011.
- The multiplier effect (indirect and induced impacts) of the economic activity at ANC supports an additional 6,454 jobs and \$303 million in annual earnings.
- In total, ANC generated 15,577 jobs and \$1.0 billion in earnings in the Anchorage economy in FY 2011.
- One in 10 jobs in Anchorage is directly or indirectly related to ANC.

Spending on Goods and Services

- Alaska's private sector provides a wide range of goods and services to ANC, including wholesale and retail trade goods, electric power and other utilities, fuel, construction services, and professional and technical services. Eighty percent of ANC's spending in FY 2011 was related to construction, followed by utilities (5 percent), and wholesale and retail trade (4 percent).
- The majority of vendors are located in the Anchorage area, representing \$8 out of every \$10 ANC spent with Alaska's private sector in FY 2011.

Construction Projects

- In FY 2011, public infrastructure construction projects at ANC generated an estimated 1,078 annual equivalent jobs (direct and indirect) in Anchorage and \$54 million in earnings.

Government Revenues

- Since ANC falls under the Alaska International Airport System, which is owned and operated by the Alaska Department of Transportation and Public Facilities, all revenues support the International Airport Revenue Fund (IARF), a self-sufficient enterprise fund of the State of Alaska.
 - In FY2011, \$101.2 million in operating and investment revenues were generated for the IARF. Landing fees made up 37 percent (or \$37.5 million) of total revenue.
- ANC generates a significant amount of direct revenue for the Municipality of Anchorage, including at least \$2.3 million in property tax payments to the Municipality from businesses operating at ANC in 2011.
- ANC also received \$32.5 million in capital contributions from federal agencies (Federal Aviation Administration and Transportation Safety Administration) and passenger facility charges in FY 2011.

Aviation Activity

- ANC is an international air cargo hotspot, as well as an important passenger gateway in Alaska. ANC received about 274,000 aircraft landings in FY 2011. These landings accounted for over 5 million passengers and more than 5.75 billion pounds of freight. Below is a table that summaries FY2011 flight activity.

ANC Flight Activity Summary, July 2010-June 2011

Totals	
Passenger	
Total international volume	40,831 passengers
Total domestic volume	4,877,898 passengers
Total transit volume	164,204 passengers
<i>Total passenger volume</i>	<i>5,082,592 passengers</i>
Total passenger landings	50,687 landings
Cargo	
Total international cargo	3.78 billion pounds
Total domestic cargo	1.97 billion pounds
Percentage of cargo that is transit	34%
<i>Total cargo volumes</i>	<i>5.75 billion pounds</i>
Total all-cargo landings	86,254 landings
Other	
Total general aviation and other aircraft movements	82,909 landings
Total all aircraft movements	273,682 landings

Source: ANC

Linking Anchorage

Passenger Travel

- In 2010, 2.3 million passengers boarded direct flights that originated in Anchorage. These passengers traveled from Anchorage to 136 different “first stop” destinations in Alaska, the U.S., and internationally.
 - Top Alaska destinations are Fairbanks, Juneau, Kenai, Kodiak, and Bethel.
 - Top U.S. destinations are Seattle (WA), Minneapolis (MN), Chicago (IL), Portland (OR), and Salt Lake City (UT).
 - Top international destinations are Taipei (Taiwan), Vancouver (Canada), Frankfurt (Germany), Tokyo (Japan) and Osaka (Japan).

Cargo Linkages

WITHIN ALASKA

- Approximately 148 million pounds of cargo was transported from Anchorage to over 90 Alaska communities in 2010. The largest volume of cargo was transported to Bethel with 36 million pounds, followed by Nome, Kotzebue, Dillingham, and Fairbanks.

OTHER U.S. DESTINATIONS

- Of the 3.4 billion pounds of cargo that traveled from ANC to the Lower 48 in 2010, approximately 3.2 billion pounds went to 10 destinations. Chicago received the most cargo, followed by Los Angeles, New York, Louisville, and Dallas/Fort Worth.

ASIA

- In total, 2.1 billion pounds of cargo were transported from the U.S. to Asia in 2010. Another 4.1 billion pounds were transported from Asia to the U.S. The majority of the cargo going both directions traveled through ANC:
 - 71 percent of all Asia-bound cargo volume from the U.S., and
 - 82 percent of all cargo U.S.-bound cargo volume from Asia.
- While the volume of cargo transiting through ANC is already substantial, just over half of total aircraft capacity (56 percent) was utilized on the way from ANC to Asia in 2010. Substantially more aircraft capacity (84 percent) was utilized from Asia to ANC. This additional capacity represents an opportunity for future growth in ANC's already important role in international cargo transportation.

OTHER INTERNATIONAL DESTINATIONS

- Less than 1 percent of ANC's total international cargo activity in 2010 went to countries other than China, Hong Kong, Japan, Korea, and Taiwan. Of that 1 percent, the top five international destinations were: Toronto, Canada; Frankfurt, Germany; Helsinki, Finland; Guadalajara, Mexico; and Yuzhno-Sakhalinsk, Russia.

Other Measures of Economic Impacts

Visitor Spending Impacts

- The visitor industry is an important contributor to Southcentral Alaska's economy. Most of Anchorage's visitors (not including Alaska resident visitors) enter or exit Southcentral Alaska through ANC.
- An estimated 550,000 out-of-state and international visitors traveled to Southcentral Alaska via ANC during the summer 2011 tourist season.

- Combined with an average per person per trip spending estimate of \$1,500 in FY 2011, total annual spending by nonresident visitors exiting Alaska from ANC is \$825 million. Additional spending on air tickets by nonresidents traveling to Anchorage is estimated at \$220 million.
- Visitor spending on air travel affects ANC's revenues from a number of sources, including landing fees, fuel fees, airline employee wages, and other purchases in support of airline and airport operations.
- The visitor industry also generates significant revenue to the Municipality of Anchorage in the form of room tax and vehicle rental tax receipts. An estimated 75 percent (or \$18.9 million) of these tax receipts is associated with resident and nonresident travel through ANC.

Summary of ANC Economic Impacts, FY 2011

Economic Activity	Impacts
Direct Impacts	
Annual average direct employment	9,123
Annual direct payroll	\$723.6 million
Private sector spending on goods and services	\$82.6 million
Construction expenditure	\$89.0 million
Revenue to International Airport Revenue Fund	\$101.2 million
Property tax payments to Municipality of Anchorage by ANC leaseholders	>\$2.3 million
Number of communities with direct passenger service from ANC	136
Global airport ranking by volume of air cargo	5 th
Domestic airport ranking by volume of air cargo	2 nd
Multiplier Effects	
Indirect and induced employment in Anchorage	6,454
Indirect and induced payroll in Anchorage	\$303.2 million
Total Impacts	
Total employment (direct, indirect, and induced) in Anchorage	15,577
Total payroll (direct, indirect, and induced) in Anchorage	\$1,026.8 million
Other Economic Impacts	
Estimate of Alaska spending by Southcentral visitors who use ANC	\$825 million

Source: ANC, Alaska Department of Labor and Workforce Development, and McDowell Group estimates.

Methodology

The Anchorage Economic Development Corporation contracted with McDowell Group to conduct an economic impact study of the Ted Stevens Anchorage International Airport (ANC).

The analysis is based on the impact of businesses, organizations, and agencies located at ANC, including air carriers, airport concessions and other leaseholders, air freight companies, airline support services, and government and civic organizations. This analysis includes not only the activity associated with ANC's North and South Terminals and runways, but also the adjacent Lake Hood Seaplane Base (LHD) and Lake Hood Strip (Z41) general aviation airports. It provides an estimate, otherwise known as the multiplier effect, of the spending impacts of these entities and their employees on jobs and income for businesses located elsewhere in Anchorage.

This study does not include other air-related businesses (such as off-site air freight companies, or aircraft repair or supply businesses) that are not found at ANC, as these firms are also present to serve other private and commercial interests located at Merrill Field and other airports and airstrips throughout Alaska.

While it is obvious that visitation to Southcentral Alaska would be seriously curtailed without ANC, this report does not estimate the visitor industry's employment and income impacts directly attributable to ANC. Rather, this report includes a discussion of the value of Alaska's visitor industry and its importance in Anchorage's economy, and the role ANC plays in supporting that industry.

A variety of data sources were used for this study. ANC provided McDowell Group with employment, payroll, labor costs, revenue and vendor spending data. ANC also provided background information on airport facilities, leaseholders, and number of badged employees working at ANC. The Alaska Department of Labor and Workforce Development (ADOLWD) provided customized data on the annual average employment and payroll of entities located at ANC. Transportation statistics were reported by the Airports Council International and ANC. Property tax data was retrieved from the Municipality of Anchorage's property tax account website. Many individual businesses located at ANC were also directly contacted to better understand their employment impact and business activities.

McDowell Group used the input-output model, IMPLAN™, to estimate the multiplier effect of activity at ANC on the Anchorage economy.

Overview of ANC

ANC is Alaska's busiest airport. The airport serves as the principal hub for many carriers serving Alaska's regional, U.S. and international markets. ANC encompasses 4,837 acres, including three runways over 10,600 feet long (the longest is 12,400 feet). The ANC property also contains the adjacent Lake Hood Seaplane Base (LHD) and Lake Hood Strip (Z41) general aviation airports connected by a taxiway. ANC has 500 floatplane slips and 100 ski-equipped airplanes use Lake Hood during the winter season. There are also 500 wheeled airplane tiedowns (largely for private-use planes). Lake Hood is considered the largest and most heavily populated seaplane base in the world.¹

Two terminal buildings, known as the North and South terminals, operate at ANC. The North Terminal houses both domestic and international operations, a duty-free shop, and the administration and operations for the U.S. Department of Homeland Security, Customs and Border Protection, and the U.S. Department of Agriculture. The South Terminal largely serves domestic and regional air carrier operations in A, B, and C concourses, as well as providing space for ANC staff offices, restaurants, bars, gift shops, ground transportation, the Rental Car Center, and the Alaska Railroad Train Depot.

Since operations began in 1953, ANC has grown significantly; most changes have occurred in the past 10 years, including:

- 2000-2004 – major renovations to C concourse
- 2005 – opening of a new airfield maintenance facility
- 2007 – construction of the Rental Car Center
- 2007-2009 – renovation of B concourse
- 2010 – reconstruction of the southerly east/west runway
- 2011 – lengthening of the southerly east/west runway

Tenants

In addition to ANC administrative offices, approximately 265 businesses or agencies lease (or sublease) space at ANC. These businesses range from large operations (e.g., Federal Express) to small businesses (e.g., a barbershop.) The tenants provide direct services for airport and airline operations, or they provide goods or services that primarily serve passengers or air cargo clients. The wide array of businesses or agencies includes:

- Air service (more than 35 regional and small carriers, and flight seeing operations, such as Iliamna Air and Rust's Flying Service)

¹ ANC.

- Airlines (approximately 45 large carriers, such as Alaska Airlines, Delta Airlines, Korean Air Lines and Cathay Pacific)
- Airport operations and support (at least 40 businesses, including Sky Chefs, Alaska Snow Removal, Huntleigh USA Corporation, Swissport Fueling, and Tesoro Alaska Company)
- Logistics and freight forwarders (at least 10 companies, such as Alaska Air Forwarding, Commodity Forwarders, and Midnight Sun Logistics)
- Car rental and parking (approximately 15 companies, including AVIS Rent a Car, and Republic Parking)
- Federal government offices, including U.S. Transportation Security Administration, US Fish & Wildlife Service, U.S. Coast Guard, U.S. Department of Commerce – National Oceanic and Atmospheric Administration, U.S. Postal Service, and Federal Aviation Administration
- State government, including Alaska Department of Transportation and Public Facilities and Alaska Department of Public Safety
- Associations or organizations (such as the Anchorage Convention and Visitors Bureau, and Alaska Airmen’s Association, Inc.)
- Tourism and cultural attractions (Alaska Railroad Corporation, Alaska Aviation Heritage Museum, and Royal Celebrity Tours)
- Retail stores and service providers (approximately 80 businesses, including Duty Free Shoppers, Brookstone Stores, and Hudson’s)
- Food and drink establishments (such as Chili’s, Starbucks, Yogurtland, and McDonald’s)
- Alaska industry (including BP Exploration Alaska and ConocoPhillips Alaska)

By February 2011, Kulis Air National Guard Base located at ANC completed its move of approximately 350-400 full-time jobs and 1,300 “weekend warriors” to Joint Base Elmendorf-Richardson. ANC is actively seeking new tenants for the space previously occupied by Kulis.

A complete list of tenants (and subtenants) is found in the Appendix.

Summary of ANC Aviation Activity

ANC is an international air cargo hotspot, as well as an important passenger gateway in Alaska. The airport received 273,682 landings in FY 2011 (July 2010 – June 2011). These landings include a total of over 5 million passengers. The table below provides a summary of ANC's passenger and air cargo activity in FY 2011.

ANC Aviation Activity Summary, July 2010-June 2011

Totals	
Passenger	
Total international volume	40,831 passengers
Total domestic volume	4,877,898 passengers
Total transit volume	164,204 passengers
<i>Total passenger volume</i>	<i>5,082,592 passengers</i>
Total passenger landings	50,687 landings
Cargo	
Total international cargo	3.78 billion pounds
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Percentage of cargo that is transit	34%
<i>Total cargo volumes</i>	<i>5.75 billion pounds</i>
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Other	
Total general aviation and other aircraft movements	82,909 landings
Total all aircraft movements	273,682 landings

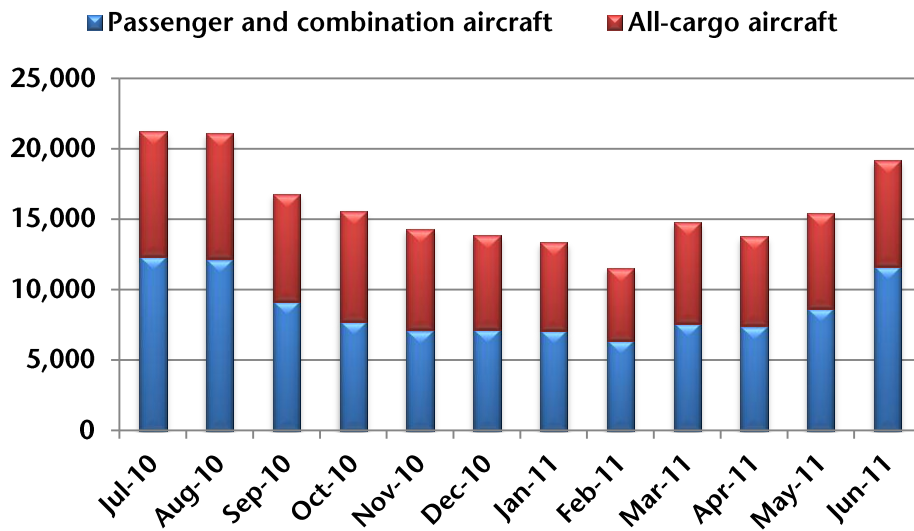
Source: ANC

Landings

Of the total landings at ANC in FY 2011, 86,254, or 32 percent, were all-cargo landings. Another 38 percent were either all-passenger landings or a combination of passengers and cargo. The remaining 30 percent of landings were categorized as "general aviation and other aircraft movements."

The airport received the most air transportation movements (combined total passenger, combination and all-cargo landings) in the summer months and the fewest in the winter season. Total air transportation movements for July and August 2010, and June 2011 combined totaled 61,486 landings, or 32 percent of all landings in FY 2011. Total combined air transportation movements for December 2010, and January and February 2011 were 38,669, or 20 percent of all landings in FY 2011.

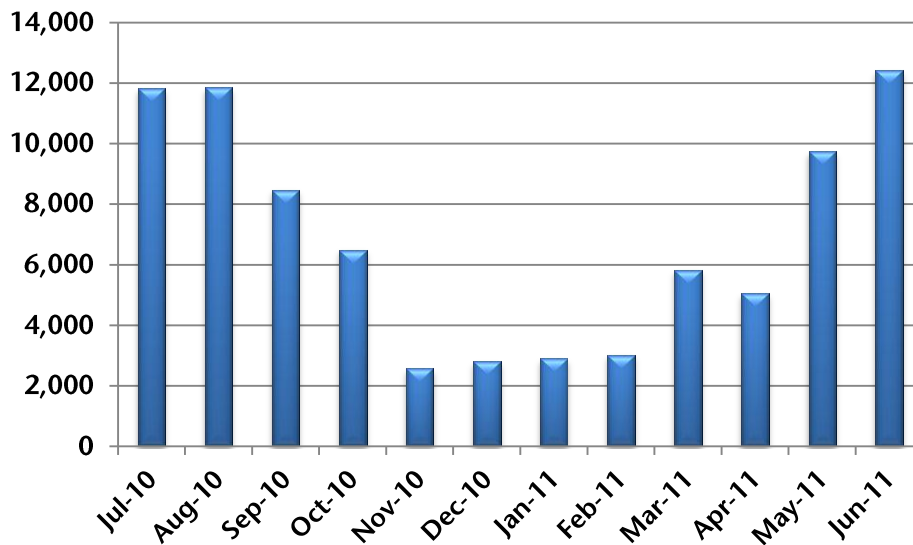
Total ANC Air Transportation Movements by Month, July 2010-June 2011



Source: ANC

General aviation and other aircraft movements followed a similar seasonal pattern, with the lowest number of landings for FY 2011 in November (2,807 landings) and the highest in June (12,409).

ANC General Aviation and Other Aircraft Movements, by Month, July 2010-June 2011



Source: ANC

Cargo Activity

Global Ranking

ANC ranks among the top five airports worldwide in terms of air cargo throughput (including loaded and unloaded freight and mail.) The cargo throughput at ANC was the fifth highest worldwide in 2010, after Hong Kong; Memphis, Tennessee; Shanghai, China; and Incheon, Korea. Watching the cargo activity trends at these airports is often a good indicator of the ebbs and flows of the global economy.

Top Five Air Cargo Airports, Worldwide, 2010

Airport	Volume (pounds)
Hong Kong	9.18 billion
Memphis, Tennessee	8.64 billion
Shanghai, China	7.12 billion
Incheon, Korea	5.92 billion
Anchorage, Alaska*	5.83 billion

* Includes transit freight

Source: Airports Council International, 2010.

Domestic Ranking

Within North America, ANC ranks second in landed weight behind Memphis. Other airports with high cargo volumes in North America include Louisville, Kentucky; Miami, Florida; and Los Angeles, California.

Top Five Air Cargo Airports, North America, 2010

Airport	Volume (pounds)
Memphis, Tennessee	8.64 billion
Anchorage, Alaska*	5.83 billion
Louisville, Kentucky	4.78 billion
Miami, Florida	4.05 billion
Los Angeles, California	3.85 billion

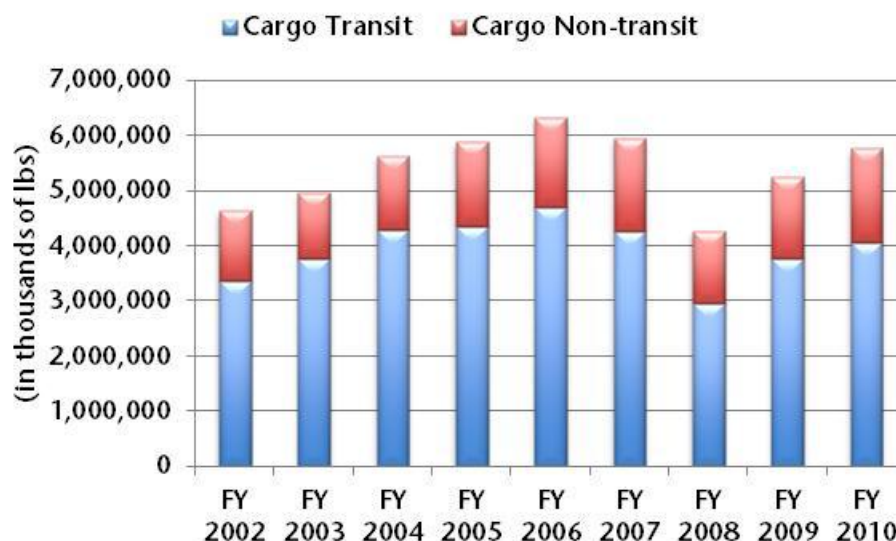
* Includes transit freight

Source: Airports Council International – North America, 2010.

Historical Air Cargo Volume

The volume of air cargo through ANC has fluctuated from year to year (between FY 2002 and FY 2010), ranging from a low of 4.19 billion pounds in 2008 to a high of 6.39 billion pounds in 2006. Since FY 2002, approximately 73 percent of all air cargo was “in transit” through ANC.

ANC Air Cargo Transit and Air Cargo Non-transit Volume, by Fiscal Year, FY 2002-FY 2010

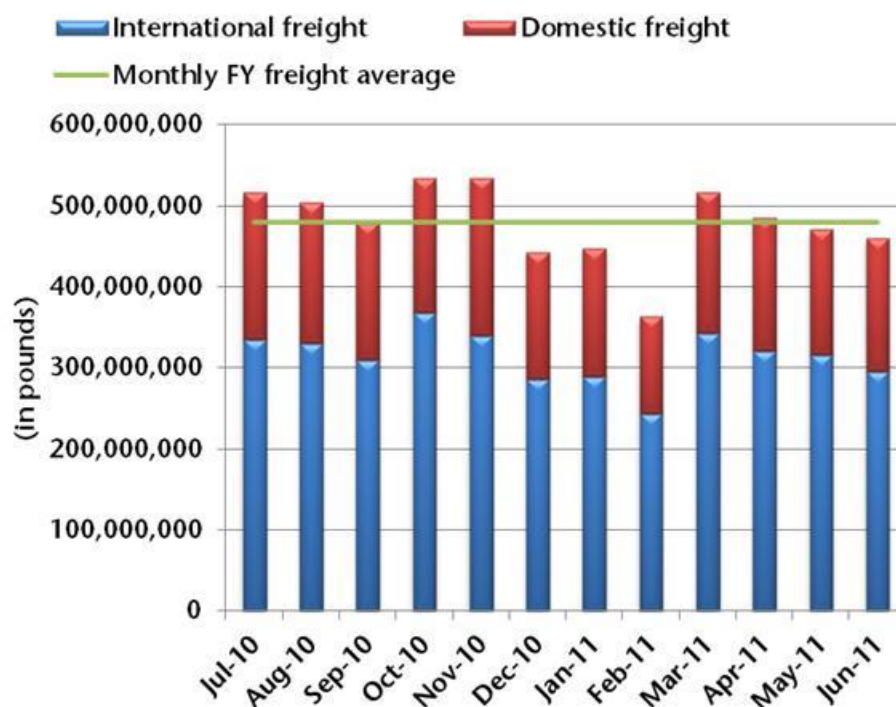


Source: ANC

FY 2011 Air Cargo Volume

For all landings, total cargo volume at ANC in FY 2011 topped 5.73 billion pounds of freight. The monthly average cargo volume for the airport was 480 million pounds in FY 2011, with a low of 363 million pounds in February and a high of 535 million pounds in November. International cargo accounted for an average 66 percent of all cargo volume. Thirty-four percent of FY 2011 cargo volume was in transit.

Total ANC Freight Volume, by Month, July 2010-June 2011

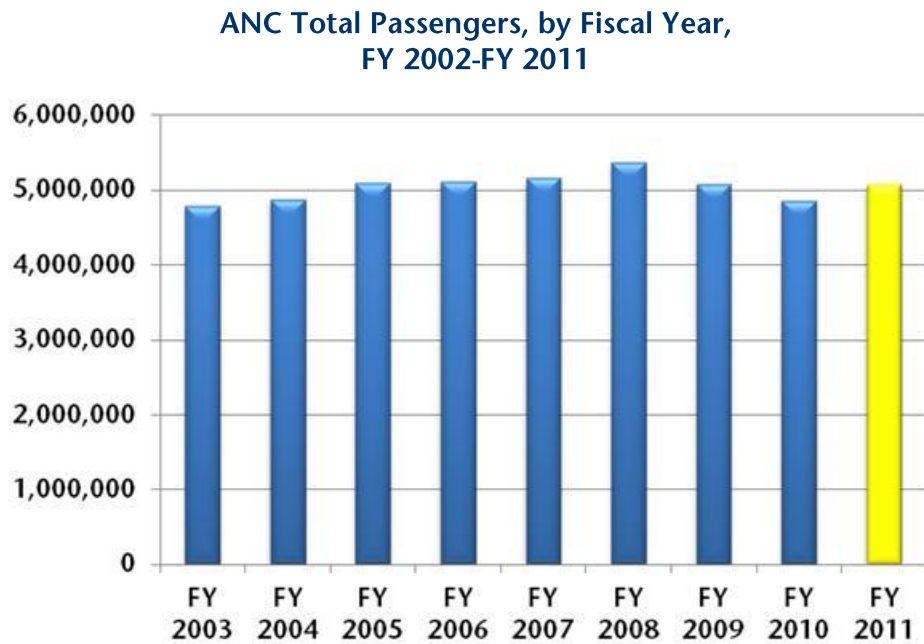


Source: ANC

Passengers

Historical Passenger Volume

Passenger volumes through ANC remained fairly steady between FY 2002 and FY 2010. During that period, the volume of passengers through ANC reached a low of 4.8 million in FY 2002 and a high of 5.4 million in FY 2007.

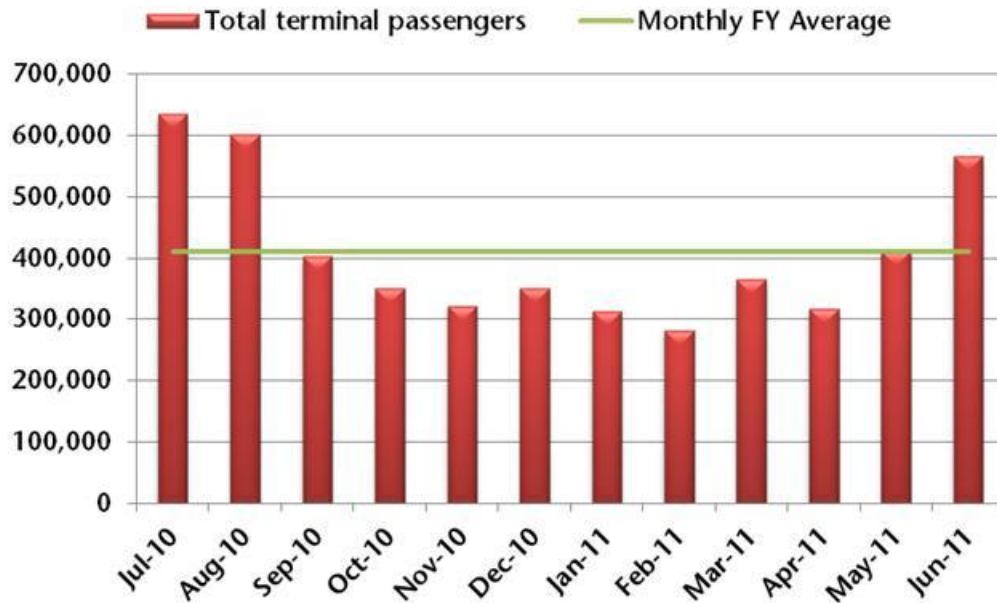


Source: ANC

FY 2011 Passenger Volume

The total passenger volume at ANC fluctuates seasonally much more than cargo volume. Total monthly terminal passenger volume averaged 409,866 in FY 2011. This figure includes all ANC enplaning and deplaning passengers and does not include “in transit” passengers transferring flights in ANC to other destinations. The monthly volume was highest in summer months and lowest in the winter. July saw the largest passenger volume at 635,263 and the lowest volume was in February at 282,424 passengers.

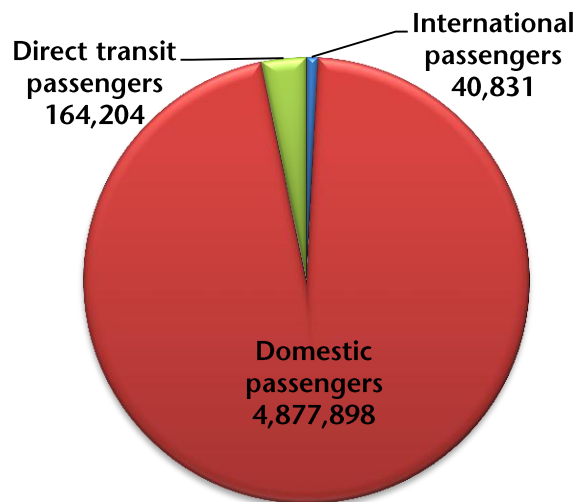
Total ANC Terminal Passenger Volume, by Month, July 2010-June 2011



Source: ANC

The vast majority of passenger traffic at ANC is domestic. Over 4.8 million domestic passengers accounted for 96 percent of passenger volume in FY 2011. Transit passengers (164,204) accounted for a little over 3 percent of total passenger volume and international passengers (40,821) comprised less than one percent.

ANC Commercial Passenger Volume, by Type, July 2010-June 2011



Source: ANC

Passenger Travel Linkages

In 2010, 2.3 million passengers boarded direct flights that originated in Anchorage. Those passengers traveled on flights segments from ANC to 136 different “first stop” destinations in Alaska, the U.S., and a number of other countries.

Top Alaska Destinations

With direct connections to 92 locations in the state, Anchorage serves as a major air transportation hub for Alaska communities. In 2010, ANC passengers most frequently traveled to Fairbanks, with 244,545 enplanements on eight airline carriers (two of which carried the bulk of the passengers). Juneau was the next most frequent destination, with 94,807 enplanements. Kenai, Kodiak, Bethel, and King Salmon were also common destinations for Anchorage passengers.

Top 20 Alaska Destinations, 2010

Community	Total Segment Enplanements	Number of Carriers
Fairbanks	244,545	8
Juneau	94,807	5
Kenai	78,925	5
Kodiak	65,789	6
Bethel	55,956	7
King Salmon	40,739	7
Kotzebue	33,434	3
Dillingham	26,814	6
Homer	24,675	3
Cordova	24,536	3
Nome	21,567	5
Deadhorse	16,678	3
Valdez	15,209	2
Unalaska	7,040	7
Red Dog	6,961	2
Unalakleet	6,145	5
Sandpoint	4,425	2
St. Mary's	4,247	3
McGrath	4,071	4
Iliamna	2,794	2

Source: ANC

Top U.S. Destinations

In addition to numerous connections within Alaska, direct (non-stop or multi-stop) flights operated between Anchorage and 26 destinations throughout the Lower 48 in 2010. Six carriers transported 692,216 passengers to Seattle, the top destination for Anchorage passengers. The next most frequent destinations within the Lower 48 were Minneapolis (131,487 enplanements), Chicago (93,064 enplanements), and Portland, Oregon (87,282 enplanements).

Top 10 U.S. Destinations outside of Alaska, 2010

Location	Total Segment Enplanements	Number of Carriers
Seattle, WA	692,216	6
Minneapolis, MN	131,487	4
Chicago, IL	93,064	3
Portland, OR	87,282	2
Salt Lake City, UT	72,210	1
Denver, CO	41,759	4
Phoenix, AZ	41,494	1
Honolulu, HI	36,656	1
New York, NY	32,104	2
Houston, TX	23,051	2

Source: ANC

Top International Destinations

Anchorage air passengers are connected, through direct flights (non-stop or multi-stop), to a number of international destinations, including Canada, China, Germany, Japan, and Russia. The top international destination for passengers on direct flights from Anchorage in 2010 was Taipei, Taiwan, with 88,825 enplanements. Anchorage is connected by air to six locations in Canada, with the majority of Canadian-bound passengers boarding planes for Vancouver (12,029 in 2010). Frankfurt, Germany was the third most frequent international destination in 2010, with 11,618 enplanements. Flights to Taipei, Vancouver, and Frankfurt carried significantly more passengers as a whole than any of the other international destinations.²

Top 5 International Destinations, 2010

Country	Total Segment Enplanements	Number of Carriers
Taipei, Taiwan	88,825	3
Vancouver, Canada	12,029	1
Frankfurt, Germany	11,618	1
Tokyo, Japan	3,360	7
Osaka, Japan	699	2

Source: ANC

² China Air flights to Taipei were cancelled in late 2011 and Condor flights to Frankfurt increased in 2011.

Cargo Linkages

In 2010, a total of over 5 billion pounds of cargo traveled from ANC to destinations within Alaska, the Lower 48, and 11 other countries. Approximately 70 percent of that total was transported to destinations within the U.S. Most of the other 30 percent was transported to Asia, specifically Taiwan, South Korea, Hong Kong, Japan, and China. A smaller amount of cargo traveled from ANC to Europe, North America, Russia (Asian), and Thailand.

All ANC Cargo Destination Countries, 2010

Location	Total Departures	Total Cargo Volume (pounds)
U.S. (including Alaska)	28,468	3.5 billion
Taiwan	3,077	379 million
South Korea	2,808	366 million
Hong Kong	2,757	329 million
Japan	2,295	266 million
China	1,503	156 million
Canada	57	11.8 million
Germany	19	3.5 million
Finland	3	529,253
Mexico	1	231,349
Russia	6	217,583
Thailand	1	61,897

Source: ANC

Cargo Linkages within Alaska

Anchorage serves as a transportation hub for communities connected by air throughout Alaska. Over 147.6 million pounds of cargo was transported from Anchorage to over 90 Alaska communities in 2010. The largest volume of cargo was transported to Bethel with 35.7 million pounds of cargo in 2010. Other Alaska communities that received substantial volumes of cargo from Anchorage include Nome with 18.7 million pounds, Kotzebue with 18.7 million pounds, and Dillingham with 12.5 million pounds.

Top 10 ANC Cargo Destinations within Alaska, 2010

Location	Number of Carriers	Total Departures	Total Cargo Volume (pounds)
Bethel	5	1,438	35.7 million
Nome	4	623	18.7 million
Kotzebue	4	572	17.4 million
Dillingham	5	809	12.5 million
Fairbanks	7	706	6.9 million
Aniak	7	778	6.6 million
Unalakleet	5	360	6.0 million
King Salmon	6	523	6.0 million
St. Mary's	4	206	4.7 million
Emmonak	1	1	4.5 million

Source: ANC

Cargo Linkages to Other U.S. Destinations

Of the 3.4 billion pounds of cargo that traveled from ANC to the Lower 48 in 2010, approximately 3.2 billion went to 10 destinations. Chicago, Illinois received the most cargo by volume from ANC of any destination in the Lower 48. Almost a quarter (23 percent) of all Lower 48-bound cargo from ANC headed to Chicago. Los Angeles, California (LAX) received the second highest amount of cargo by volume from ANC, with over 498 million pounds traveling from ANC to LAX. Other high-volume destinations include New York, New York; Louisville, Kentucky; and Dallas-Forth Worth, Texas. In total, cargo from ANC traveled to over 40 destinations in the Lower 48 in 2010.

Top 10 ANC to Lower 48 Cargo Destinations by Volume, 2010

Location	Number of Carriers	Number of Departures	Total Cargo Volume (pounds)
Chicago, IL	19	3,711	778 million
Los Angeles, CA	16	2,570	498 million
New York, NY	11	2,301	471 million
Louisville, KY	4	2,140	358 million
Dallas/Fort Worth, TX	11	1,352	269 million
Atlanta, GA	10	1,181	249 million
Memphis, TN	5	1,195	177 million
Covington, KY	3	673	161 million
Miami, FL	8	731	153 million
Indianapolis, IN	6	437	62 million

Source: ANC

Asia Cargo Linkages

In 2010, 2.1 billion pounds of cargo were transported from the U.S. to Asia (includes China, Hong Kong, Korea, Japan, and Taiwan). Another 4.1 billion pounds were transported from Asia to the U.S. The majority of the cargo going both directions traveled through ANC: 71 percent of all Asia-bound cargo volume from the U.S. and 82 percent of all cargo U.S.-bound cargo volume from Asia.

ANC serves as the primary transportation hub for cargo transiting between the U.S. and Asia. In 2010, 69 percent, or 12,440, of U.S. cargo departures for Asia were made from ANC. Among Asian cargo departures to the U.S., 80 percent, or 17,324, departures were from Asia to ANC.

Cargo departures from Asia to ANC are higher than departures going the other direction. In 2010, there were 39 percent more cargo departures from Asia to ANC than from ANC to Asia. The volume of Asian cargo to ANC amounted to more than double the volume of cargo that traveled from ANC to Asia in 2010. The volume of ANC-bound cargo from Asia totaled 3.3 billion. The volume from ANC to Asia totaled 1.5 billion.

ANC TransPacific (US-Asia) Cargo Activity, 2010

Movement	Departures	% of All Cargo Departures	Total Cargo (pounds)
ANC to Asia	12,440	69%	1,495,473,531
Other US to Asia	5,612	31	623,301,749
Total US to Asia	18,052	100%	2,118,775,280
Asia to ANC	17,324	80%	3,338,032,207
Asia to Other US	4,299	20	727,051,148
Total ASIA to US	21,623	100%	4,065,083,355

Note: Asia includes China, Hong Kong, Japan, Korea, and Taiwan.
Source: ANC

ANC TO ASIA DESTINATIONS

Of the Asian-bound departures from ANC, the largest number went to Taipei, Taiwan (3,076), followed by Seoul, South Korea (2,802), and Hong Kong (2,757). ANC cargo departures to Hong Kong account for 90 percent of all U.S. cargo departures to that destination. In contrast, only 58 percent of U.S. cargo departures to China and 61 percent of those to Korea are through ANC.

The largest volume of ANC cargo to Asia traveled to Taipei, Taiwan (379 million pounds), Seoul, South Korea (365 million pounds), and Hong Kong (329 million pounds). As was the case with number of departures, the volume of cargo from ANC to Hong Kong, accounted for almost all of U.S. to Hong Kong cargo (97 percent in 2010). Cargo in transit from ANC to China comprised 59 percent of total U.S. cargo to China. ANC cargo bound for Korea and Japan accounted for 61 percent of total U.S. cargo to each of those countries.

Total Cargo from ANC to Asia Destinations, 2010

Destination	Total ANC to Asia Cargo (pounds)	Number of Departures to ANC	Number of Carriers
Taipei, Taiwan	378,763,873	3,076	6
Seoul, South Korea	364,877,997	2,802	10
Hong Kong	328,755,924	2,757	9
Tokyo, Japan	178,405,171	1,459	8
Beijing, China	81,048,565	435	2
Osaka, Japan	78,501,443	784	8
Shanghai, China	72,828,643	1,005	9
Kagoshima, Japan	4,232,098	20	2
Fukuoka, Japan	3,189,299	15	3
Guangzhou, China	2,057,301	60	2
Nagoya, Japan	892,360	10	2
Other Asia	1,920,857	17	12
Total	1,495,473,531	12,440	73

Source: ANC

ASIA CARGO DEPARTURES TO ANC

The largest number of cargo departures from Asia to ANC in 2010 originated from Seoul, South Korea (5,983). The second largest number of departures came from Hong Kong, with 4,051 departures, followed by Taipei, Taiwan, with 2,262 departures. Cargo departures from Hong Kong accounted for 89 percent of all Hong Kong to U.S. cargo departures in 2010. Departures from Taiwan and Korea to ANC also accounted for a large majority of all U.S.-bound departures from those countries (85 percent of departures from Taiwan and 88 percent of departures from Korea).

Asia to ANC Cargo, by City of Origin, 2010

Origin	Total ANC to Asia Cargo (pounds)	Number of Departures to ANC	Number of Carriers
Seoul, South Korea	956,578,315	5,983	14
Taipei, Taiwan	765,410,765	2,262	4
Hong Kong	707,485,656	4,051	10
Shanghai, China	467,690,016	1,065	12
Tokyo, Japan	189,981,329	951	6
Nagoya, Japan	79,007,995	246	4
Osaka, Japan	68,143,581	473	4
Nanjing, China	42,230,646	1	1
Guangzhou, China	35,298,554	238	1
Shenzhen, China	24,895,987	1,786	2
Other Asia	1,309,363	268	4
Total	3,338,032,207	17,324	63

Source: ANC

CAPACITY UTILIZATION

While the volume of cargo transiting through ANC on an annual basis is already substantial, only 56 percent of 2010 capacity was utilized on the way from ANC to Asia. Substantially more capacity, 84 percent, was utilized from Asia to ANC, representing an opportunity for future growth in ANC's already important role in international cargo transportation.

ANC TransPacific (US-Asia) Cargo Capacity, 2010

Movement	Total Cargo	Total Capacity	Percent of Capacity Utilized
ANC to Asia	1,495,473,531	2,667,008,966	56%
Other US to Asia	623,301,749	1,304,206,854	48
Total US to Asia	2,118,775,280	3,971,215,820	53%
Asia to ANC	3,338,032,207	3,954,574,919	84%
Asia to Other US	727,051,148	1,058,110,372	69
Total ASIA to US	4,065,083,355	5,012,685,291	81%

Note: Asia includes China, Hong Kong, Japan, Korea, and Taiwan.

Source: ANC

Cargo Linkages from ANC to Other International Destinations

Less than 1 percent of cargo volume traveling to international destinations from ANC in 2010 was destined for countries other than China, Hong Kong, Japan, Korea, and Taiwan. Of that 1 percent, the majority of the cargo volume was transported to Toronto, Canada (11.7 million pounds), followed by 3.5 million pounds to Frankfurt, Germany. Helsinki, Finland, with 529,253 pounds of cargo, and Guadalajara, Mexico, with 231,349 pounds were the next two top destinations. The other ten destinations that received cargo from ANC each received less than 100,000 pounds in 2010.

Top 10 ANC to Other International Destinations (outside Asia) by Cargo Volume, 2010

Location	Number of Carriers	Number of Departures	Total Cargo Volume (pounds)
Toronto, Canada	2	54	11.7 million
Frankfurt, Germany	1	18	3.5 million
Helsinki, Finland	1	3	529,253
Guadalajara, Mexico	1	1	231,349
Yuzhno-Sakhalinsk, Russia	1	2	122,432
Bangkok, Thailand	1	1	61,897
Anadyr, Russia	1	2	56,651
Ulan-Ude, Russia	1	1	38,500
Cologne, Germany	1	1	34,908
Calgary, Canada	2	2	26,620

Source: ANC

Economic Impacts

The economic impact of ANC is felt throughout the Anchorage economy. As defined in this study, the economic impact occurs at three levels:

- Direct impacts, including jobs and earnings associated with ANC's administration and all ANC leaseholder employment and earnings
- Indirect impacts, including jobs and earnings in businesses providing goods and services to the airport, but not located at ANC
- Induced impacts, including the jobs and earnings created when ANC-related workers spend their payroll dollars in the local economy.

Employment and Earnings Impacts

An estimated 9,123 employees work directly operating ANC or with businesses or entities located at ANC. In total, these employees earned \$723.6 million in labor income in FY 2011.

Approximately 2,150 direct jobs are related to ANC's cargo handling activity due primarily to the presence of major FedEx and UPS sorting facilities. Airport support companies, regional air service providers, and major passenger airlines are the next largest source of employment. There are about 1,200 government workers at ANC who work for various municipal, state and federal agencies. About 800 workers are employed in retail, rentals, parking, ground transit, and other services at ANC. Finally, an estimated 600 construction jobs were generated by construction projects at ANC in FY 2011.

The multiplier effect (indirect and induced impacts) of economic activity at ANC supports an additional estimated 6,454 jobs (average employment multiplier of 1.71) and \$303.2 million in earnings (average earnings multiplier of 1.42) in Anchorage in FY 2011.

Combined, activity at ANC created an estimated 15,577 jobs and \$1,026.8 million in earnings in the Anchorage economy in FY 2011. About 1 in 10 jobs in Anchorage are directly or indirectly related to ANC.

Precisely measuring the indirect and induced impact of any component of the economy requires econometric modeling beyond the scope of this study. However, by using models it is possible to broadly measure the magnitude of total direct, indirect and induced economic effects. IMPLAN™ is a predictive input-output model of local and state economies, and is widely used to measure the economic impact of industries and industrial/commercial development. IMPLAN™ uses Anchorage employment and payroll data to define linkages between industries in the local economy and multipliers that predict the total impact of an economic activity, such as airport-related employment and spending. The ANC-related multiplier effects are based on IMPLAN™ data, modified to more accurately reflect the unique activity at Anchorage's airport.

The following tables summarize the total employment and earnings impacts of ANC.

Total Employment Impact of ANC – FY 2011

Type of Activity	Direct Employment	Indirect/ Induced Employment	Total Employment
Cargo Airlines/Express Delivery (incl. FedEx/UPS)	2,153	1,263	3,416
Regional Air and Cargo Service	1,373	1,477	2,850
Airport Support Operations	1,847	896	2,743
Passenger Airlines (such as Alaska Airlines)	1,042	1,121	2,163
Federal Government	786	527	1,313
Construction	586	492	1,078
Airport Retail Outlets	497	153	650
Local and State Government	418	378	796
Car Rental, Parking and Ground Transit	298	59	357
Logistics and Local Freight Services	104	80	184
Other	19	8	27
Total Airport Employment Impact	9,123	6,454	15,577

Source: Direct employment figures provided by individual employers, Alaska Department of Labor and Workforce Development and McDowell Group. Indirect/induced employment are McDowell Group estimates.

Total Earnings Impact of ANC (\$millions) – FY 2011

Type of Activity	Direct Earnings	Indirect/ Induced Earnings	Total Earnings
Cargo Airlines/Express Delivery (such as FedEx/UPS)	\$224.0	\$67.6	\$291.6
Regional Air and Cargo Service	120.0	69.0	189.0
Passenger Airlines (such as Alaska Airlines)	91.1	52.4	143.4
Airport Support Operations	99.2	43.4	142.6
Federal Government	82.1	20.3	102.4
Local and State Government	40.6	19.0	59.6
Construction	34.5	19.4	53.9
Airport Retail Outlets	19.1	6.5	25.5
Car Rental, Parking and Ground Transit	6.1	2.8	8.9
Logistics and Local Freight Services	5.6	2.4	8.0
Other	1.4	0.4	1.9
Total Airport Compensation Impact	\$723.6	\$303.2	\$1,026.8

Note: Totals may not sum due to rounding

Source: Direct earnings figures from provided by Alaska Department of Labor and Workforce Development and McDowell Group. Indirect/induced employment are McDowell Group estimates.

Spending on Goods and Services

ANC typically spends around \$100 million on operating costs and capital costs. Alaska's private sector provides a wide range of goods and services to ANC, including retail and wholesale trade goods (supplies, equipment, parts, tires, office supplies, etc.), electric power and other utilities, fuel, construction services, professional and technical services, and other goods and services. Based on spending with the top 50 vendors for airport operations and the top 50 vendors for capital expenditures (construction and equipment), the table that follows provides a breakout of ANC's private sector spending in Alaska by sector. This data refers to direct spending by ANC (State of Alaska) and does not include spending by ANC tenants.

ANC Private Sector Spending in Alaska, by Sector, FY 2011

	Spending (\$millions)	% of Total
Construction-Related Spending	\$65.9	79.8%
Utilities	4.1	5.0
Wholesale and Retail Trade	3.7	4.4
Transportation Services	2.9	3.5
Fuel	2.1	2.6
Professional and Technical Services	1.6	2.0
Security and Maintenance	1.0	1.3
Other	1.0	1.2
Nonprofit	0.2	0.3
Total	\$82.6	100.0%

Note: Totals may not sum due to rounding.

Source: ANC.

The majority of Alaska vendors that provide goods and services to ANC are located in the Anchorage area, representing \$8 out of every \$10 ANC spent with Alaska's private sector in FY 2011. These companies range from engineering firms, to security services, to electric utilities. Companies headquartered outside of Alaska that contract with ANC provided parking management services, elevator installation and maintenance, marketing services, and other goods and services. Although these firms are headquartered outside of Alaska, most employ local personnel to perform services for ANC and other customers in the Anchorage area.

ANC Private Sector Spending in Alaska, by Vendor Location

	Spending (\$million)	% of Total
Anchorage/Eagle River	\$69.2	83.8%
Other Alaska Firms	0.8	1.0
Firms Located Outside Alaska	12.6	15.2
Total	\$82.6	100.0%

Source: ANC.

Airport Public Infrastructure Construction

Approximately \$89 million was spent on capital projects for ANC public infrastructure and business support in FY 2011. About two-thirds of FY 2011 capital spending went to continued upgrades for Runway 7R/25L. In FY 2011, ANC expenditures also included construction of a new communications office, purchase of a replacement jet bridge, reconstruction of the A Concourse apron, insulation for residential neighborhoods from airport noise, and stabilization of banks around the Lake Hood Seaplane Base.³

In FY 2011, construction projects generated an estimated 1,078 annual equivalent jobs (direct and indirect) in Anchorage and \$54 million in earnings. Over the last five fiscal years, airport construction projects have created an estimated average of 1,145 jobs (direct and indirect) annually and \$286 million in earnings for all years combined.

Economic Impact of Public Infrastructure Construction Spending at ANC Airport

	Direct Impact	Indirect/Induced Impact	Total Impact
FY 2011			
Employment	586	492	1,078
Earnings	\$34.5 million	\$19.4 million	\$53.9 million
FY 2007-2011			
Employment (Annual Average)	623	522	1,145
Earnings	\$183.1 million	\$102.9 million	\$286.0 million

Source: ANC and McDowell Group estimates.

³ In the South Terminal several private construction projects for new retail and hospitality businesses were completed, including Humpy's Great Alaska Alehouse, Norton Sound Seafood Restaurant and Yogurtland.

Government Revenues

In addition to the \$32.5 million in capital contributions from federal agencies (Transportation Safety Administration and Federal Aviation Administration) and passenger facility charges, ANC generates a significant amount of direct revenue for the International Airport Revenue Fund (IARF) and the Municipality of Anchorage. Below is a brief description of the types of revenues generated.

International Airport Revenue Fund (IARF)

State revenues are largely raised via landing fees, fuel-related fees, and terminal rents. ANC falls under the Alaska International Airport System, which is owned and operated by the Alaska Department of Transportation and Public Facilities. ANC revenues support the IARF, a self-sufficient enterprise fund of the State of Alaska.

ANC generated \$101.7 million in operating and investment revenues for the IARF in FY 2011. Landing fees made up 37 percent, or \$37.5 million, of total revenue, followed by fuel flowage fees (22 percent, or \$22.6 million.)

IARF Revenue Generated by ANC

	Amount
Operating Revenue	
Landing Fees	\$37,534,000
Fuel Flowage Fees	22,598,000
Terminal Rents	12,605,000
Concession Fees	8,802,000
Vehicle Parking Fees	6,338,000
Land Rental Fees	3,877,000
Aircraft Parking Fees	3,415,700
Aircraft Docking Fees	1,352,000
Federal Inspection Fees	695,000
Aircraft Ramp Rent	641,000
Other	704,000
Total Operating Revenue	\$98,562,000
Other Revenue	
Investment Income	\$2,609,000
Total Revenue	\$101,171,000

Note: Totals may not sum due to rounding.

Source: ANC.

Local Government Revenue

Property taxes are a crucial source of municipal funding. They support educational services (40 percent of all municipal government expenses), police and fire services (30 percent), and other general government functions. Total property taxes paid by commercial and residential taxpayers to the Municipality of Anchorage in FY 2010 amounted to \$474.3 million.

While ANC does not directly provide tax revenue to the Municipality of Anchorage, the businesses that operate at ANC do pay real property tax to the municipality. The study team was able to identify \$2.3 million in real property tax payments made by ANC's tenants in 2011; however, this figure is probably higher as several tax records could not be located under the names used in ANC's tenant list.⁴

Additionally, ANC-related workers (direct and indirect) pay an estimated \$15.3 million in property taxes to the municipality.⁵

Visitors to Anchorage also make payments to the municipality in the form of bed and car rental taxes. A discussion of the role of ANC in Alaska's visitor activity may be found later in this study.

⁴ McDowell Group was able to access this information, using the real property tax account data found for 112 tenants located at <http://redirect.muni.org/propappraisal/public.html>.

⁵ This estimate is based on an assumption using the total assessed housing value in the Municipality of Anchorage, divided by total average Anchorage employment, multiplied by an estimate of total ANC-related workers living in the municipality, and multiplied by the municipality's area wide tax rate.

Other Economic Impacts

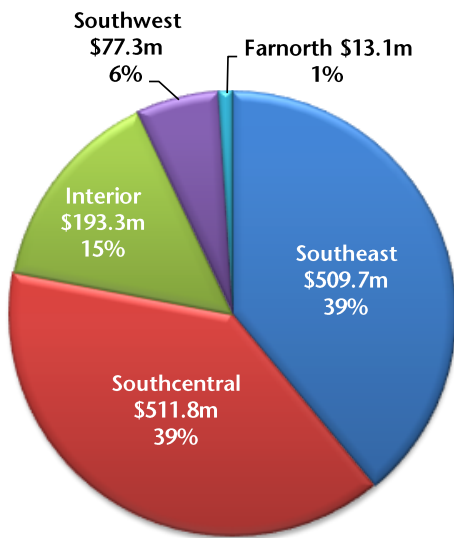
Visitor Spending Impacts

The visitor industry is an important contributor to the Anchorage and Alaska economies. Most of Anchorage's out of state/country visitors enter or exit Southcentral Alaska through ANC, making it an essential component of Alaska's visitor-related economic impacts.

In a 2010 study, McDowell Group estimated that out-of-state visitors to Alaska spent \$1.3 billion during the summer visitor season of 2009.⁶ Approximately 39 percent of that spending (or \$511.8 million) was spent in the Southcentral region. In the fall/winter visitor season (October 2008 – April 2009), spending in the Southcentral region represented 65 percent (\$128.0 million) of total Alaska visitor spending. These figures do not include spending on air travel to enter or exit the state.

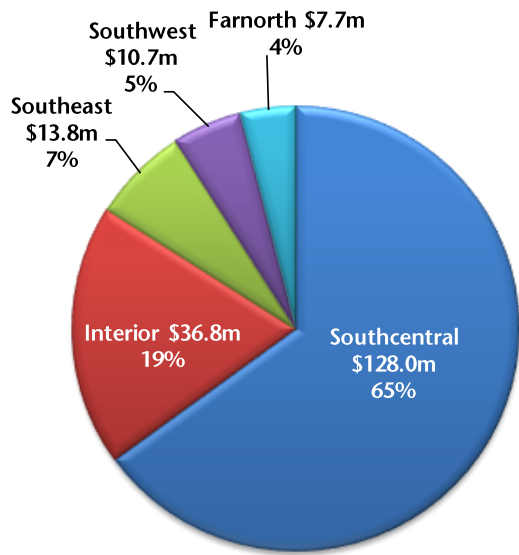
Combining the winter and summer seasons, visitor spending in Southcentral Alaska was approximately \$951.8 million or 45 percent of all visitor spending in Alaska for the fall 2008-Summer 2009 season.

**Visitor Spending
Summer 2009, by Region**



Source: McDowell Group

**Visitor Spending
Fall 2008-Winter 2009, by Region**



Source: McDowell Group

⁶ McDowell Group, *Economic Impact of Alaska's Visitor Industry, 2008-2009* p 12.

McDowell Group estimates that approximately 550,000 out-of-state and international visitors traveled through ANC during the summer 2011 season (May-September).⁷ Combined with an average per person per trip spending estimate of \$1,500, estimated total spending by nonresident visitors traveling to or exiting from ANC during the summer 2011 season is \$825 million.

Visitor spending on air travel impacts the state's economy through landing fees, fuel purchases, airline employee wages, and other purchases associated with airline and airport operations. From October 2008-September 2009, it is estimated that out-of-state visitors spent \$209 million on air travel to Southcentral Alaska. Virtually all visitors arriving or departing from the region must travel through ANC.⁸ Adjusting for growth and airfare price increases in FY 2011, it is conservatively estimated that expenditures on air travel to Southcentral Alaska was approximately \$220 million in FY 2011.

Other Visitor Industry Revenue Impacts

The visitor industry generates significant revenues for the Municipality of Anchorage. Virtually all car rental tax and room tax receipts that flow to the municipality are directly or indirectly attributed to the visitor industry (including visitors from elsewhere in Alaska, traveling for business and pleasure).

Room Tax

The Municipality of Anchorage collects a 12 percent sales tax on room rental transactions. Titled "Room Tax," the tax applies to a broad spectrum of lodging businesses (called operators), including hotels, motels, inns, corporate suites, bed and breakfasts, rooming houses, condominiums, vacation rentals, and apartments.

From July 2010 to June 2011, the Municipality of Anchorage collected \$20.4 million in room taxes.

Vehicle Rental Tax

The Municipality of Anchorage collects an 8 percent sales tax on motor vehicle rentals. Generally speaking, the maximum tax for passenger cars is \$120.00 while the maximum tax for trucks, vans and motorhomes is \$240.00.

From July 2010 to June 2011, the municipality collected \$4.8 million in vehicle rental tax.

⁷ These estimates are developed using ANC and air carrier enplanement data (these estimates do not include air visitation to Anchorage through regional carriers that do not provide flights outside Alaska), combined with resident-nonresident ratios obtained through McDowell Group's *Alaska Visitor Statistics Program VI* (2011-2012) survey study.

⁸ To estimate visitor spending on air travel, the estimated number of air visitors was multiplied by average Seattle-Anchorage round-trip fares, for both summer (\$600) and fall/winter (\$500). One-half of the total ticket spending was assumed to remain in-state. Spending was distributed by region based on exiting air traffic. The methodology is inexact: passengers fly to and from various destinations with various pricing and many passengers fly to or from points other than Seattle. In the absence of more specific data, this provides a reasonable and conservative estimate of impacts from visitor spending on airfare in and out of the state.

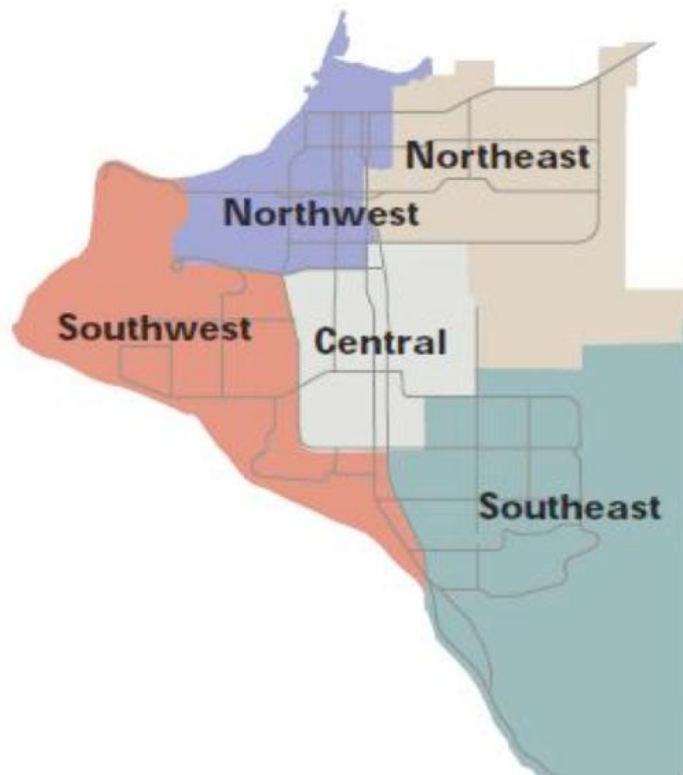
Not all of these room and rental vehicle tax receipts can be directly attributable to travelers flowing through ANC. However, it is conservatively estimated that at least 75 percent, or \$18.9 million (\$15.3 million for bed tax and \$3.6 million for rental vehicle tax), of these payments may be paid by visitors (both resident and nonresidents) who have arrived and/or departed from ANC.

Residency of Employees

Every employee that works at ANC is required to complete a security check and is issued a security badge. Using information available in the employee badging data, the residency of ANC and ANC tenant employees throughout the Anchorage Bowl, Chugiak-Eagle River and Mat-Su Borough can be identified. Approximately 70 percent of all badged employees live in the Anchorage Bowl and Eagle River. Six percent live in the Mat-Su Borough. The remaining employees either live elsewhere in Alaska, outside of Alaska, or their address was unknown.

Below is a map defining different regions of the Anchorage Bowl. A table follows that shows the residency of ANC-related employees by zip code.

Map of Anchorage Bowl Regions



Residency of ANC Badged Employees (as of October 10, 2011)

	Number of Badge Holders	% of Total
Northwest Anchorage	913	10.6%
99501	268	3.1
99517	530	6.2
99519	55	0.6
99509	38	0.4
99513	5	0.1
99514	11	0.1
99520	5	0.1
99599	1	<0.1
Northeast Anchorage	663	7.7%
99504	600	7.0
99505	9	0.1
99506	14	0.2
99510	8	0.1
99521	10	0.1
99524	22	0.3
Central Anchorage	1,201	14.0%
99503	350	4.1
99508	540	6.3
99518	296	3.4
99523	15	0.2
Southwest Anchorage	1,510	17.6%
99502	924	10.8
99511	24	0.3
99515	536	6.2
99521	26	0.3
Southeast Anchorage	1,241	14.5%
99507	852	9.9%
99516	384	4.5
99540	5	0.1
Chugiak/Eagle River	430	5.0%
99567	103	1.2
99577	327	3.8
Girdwood (99587)	20	0.2%
Mat-Su Borough	515	6.0%
99654	255	3.0
99645	179	2.1
99652	14	0.2
99674	5	0.1
99623	2	<0.1
99629	2	<0.1
99687	58	0.7
Total ANC and Mat-Su	6,493	75.6%
Zip Code Unknown	1,650	19.2%
Other Alaska	150	1.7%
Outside Alaska	302	3.5%
Total Employee Count	8,585	100.0%

Source: ANC.

Appendix: List of ANC Leaseholders

ANC Leaseholders, by Industry or Sector

Tenant/Subtenant	Industry or Sector
Guardian Flight Services	Air Ambulance
Lifemed Alaska	Air Ambulance
Air Canada	Airline
Air China Cargo Company Ltd.	Airline
Alaska Airlines Inc.	Airline
American Airlines, Inc.	Airline
Asiana Airlines	Airline
Atlas Air, Inc.	Airline
Cargo 360, Inc.	Airline
Cargolux Airlines International Sa	Airline
Cathay Pacific Airways	Airline
China Airlines	Airline
China Cargo Airlines	Airline
China Southern Airlines	Airline
Condor Flugdienst, Gmbh	Airline
Continental Airlines	Airline
Delta Air Lines, Inc.	Airline
DHL Express (USA), Inc.	Airline
Eva Airways Corporation	Airline
Evergreen International Airlines, Inc.	Airline
Federal Express Corporation	Airline
Frontier Airlines, Inc.	Airline
Jade Cargo International Company	Airline
Japan Airlines Co., Ltd.	Airline
Jetblue Airways	Airline
Kalitta Air	Airline
Korean Air Lines	Airline
MN Airlines, LLC dba Sun Country	Airline
Nippon Cargo Airlines	Airline
Omni Air International, Inc.	Airline
Polar Air Cargo Worldwide, Inc.	Airline
Singapore Airlines Cargo Pte. Ltd.	Airline
Southern Air, Inc.	Airline
United Parcel Service	Airline
US Airways, Inc.	Airline

World Airways, Inc.	Airline
Yangtze River Express Airlines	Airline
Aero Anchorage, LLC	Airline Support
Aeronautical Radio Inc.	Airline Support
Air Liquide America Corp.	Airline Support
Airline Support Inc.	Airline Support
Airport Mechanical Services, Inc.	Airline Support
Contego Systems Anc, LLC	Airline Support
D & S Services	Airline Support
Delta Air Lines Global Services	Airline Support
Elite Line Services	Airline Support
Evergreen Aviation Ground Logistic Enterprises, Inc.	Airline Support
F&E Aircraft Maintenance, LLC	Airline Support
Flight Services & Systems, Inc.	Airline Support
Have Tools Will Travel	Airline Support
International Freight Terminal	Airline Support
LVL Services Inc.	Airline Support
Matheson Flight Extenders, Inc.	Airline Support
Northern Air Maintenance Service	Airline Support
Olympic Security Services, Inc.	Airline Support
Pegasus Aviation Services LLC	Airline Support
Rotating Services, LLC	Airline Support
SCIS Air Security Corporation	Airline Support
Sky Chefs	Airline Support
Swissport USA, Inc.	Airline Support
Thompson And Associates, Inc.	Airline Support
Ukpik, LLC	Airline Support
Passur Aerospace, Inc.	Airport Support
Siemens	Airport Support
Sita	Airport Support
BP Exploration, Inc.	Alaska Industry -- Oil
ConocoPhillips Alaska, Inc.	Alaska Industry -- Oil
Nikiski Alaska Pipeline Co.	Alaska Industry -- Oil
Great Pacific Seafoods, Inc.	Alaska Industry -- Seafood
Udelhoven Oilfield System Services	Alaska Industry Oilfield Support
Alaska Airmen's Association Inc.	Association or Organization
Alaska Wing Civil Air Patrol	Association or Organization
Anchorage Convention & Visitors Bureau	Association or Organization
Armed Services YMCA Of Alaska	Association or Organization
Lake Hood Air Park Association	Association or Organization

Opportunity Flying Club, Inc.	Association or Organization
ABC Motorhome Rentals	Car Rental and Parking
Air/Park, Inc.	Car Rental and Parking
Alaska Rent A Car Inc. dba Avis Rent A Car	Car Rental and Parking
Alaska Sales And Service, Inc. dba National Alamo Car Rental	Car Rental and Parking
Anchorage RAC Center, LLC	Car Rental and Parking
Corporate Sales And Leasing, Inc.	Car Rental and Parking
Enterprise Leasing Company dba Enterprise Rent A Car	Car Rental and Parking
Floyd & Sons, Inc. dba Dollar/Thrifty Rent A Car	Car Rental and Parking
Hertz Corporation, The	Car Rental and Parking
Kiska Corp. dba High Country Car Rental	Car Rental and Parking
Postmark Properties	Car Rental and Parking
Republic Parking System	Car Rental and Parking
Para Tours	Car Rental and Parking
Ace Hangars/Fuels, LLC	Commercial Aviation
Airplane Hangars Inc.	Commercial Aviation
Alaska Aircraft Sales Inc.	Commercial Aviation
Alaska Appraisal And Consulting	Commercial Aviation
Alaska Cargoport LLC	Commercial Aviation
Alaska Freshwater Adventures, LLC	Commercial Aviation
Alaska Skyways, Inc.	Commercial Aviation
Anchorage Executive Airpark Association, Inc.	Commercial Aviation
Bwana, Inc.	Commercial Aviation
Era Fbo LLC	Commercial Aviation
Era Fbo, LLC dba Million Air	Commercial Aviation
Flowers International LLC	Commercial Aviation
Fly 4 You, Inc.	Commercial Aviation
Frontier Hangar Group, LLC	Commercial Aviation
Gee Bee Inc.	Commercial Aviation
Gillette, Brian	Commercial Aviation
Global Rides, LLC	Commercial Aviation
Great Circle Flight Services LLC	Commercial Aviation
Hangar Group Inc.,	Commercial Aviation
Hangars 907, LLC	Commercial Aviation
Investment Group Inc.	Commercial Aviation
Jensen, James & Loree	Commercial Aviation
Joseph And Terry Ferguson Revoc	Commercial Aviation
Lake Hood Air Harbor Inc.	Commercial Aviation
Lake Hood Associates, LLC	Commercial Aviation
Lake-Aire Alaska, LLC	Commercial Aviation

Laughlin Acquisitions, LLC	Commercial Aviation
Northern Holdings, LLC	Commercial Aviation
R.L. Ketchum Enterprises	Commercial Aviation
Rita N. Sholton, Inc.	Commercial Aviation
Rogers, Donald	Commercial Aviation
Signature Flight Support Corp.	Commercial Aviation
Silvertip LLC	Commercial Aviation
Tefcor Management Inc.	Commercial Aviation
Trinity Investments LLC	Commercial Aviation
Troy Air, Inc.	Commercial Aviation
Whittock, Tyson H.	Commercial Aviation
Alcan Electrical & Engineering Inc.	Construction
Consolidated Enterprises, Inc.	Construction
Davidson, Dan And Garoutte, Kirk	Construction
Granite Construction Company	Construction
Western Construction & Equipment	Construction
U.S. Department Of Commerce - NOAA	Federal Government
U.S. Department Of Transportation, FAA	Federal Government
U.S. Fish & Wildlife Service	Federal Government
U.S. General Services Administration	Federal Government
U.S. Postal Service	Federal Government
U.S. Transportation Security Administration	Federal Government
United States Coast Guard	Federal Government
Honeysuckle Hill Ltd.	Food and Beverage Service
Chen Alaska	Food and Beverage Service
Host International, Inc. dba HMS Host	Food and Beverage Service
McDonald's	Food and Beverage Service
Amerigas Propane	Fueling
Anchorage Fueling & Service Co	Fueling
Inlet Petroleum Company	Fueling
International Aviation Service, Inc.	Fueling
North Park Fuels, Inc.	Fueling
Shoreside Petroleum Inc.	Fueling
Swissport Fueling Inc.	Fueling
Tesoro-Alaska Company	Fueling
BAC Transportation LLC	Ground Transportation
Valentino Chauffeur Services LLC	Ground Transportation
Valley Shuttle Service LLC	Ground Transportation
MOA - Police And Fire	Local Government
Municipality Of Anchorage	Local Government

Air Land Transport	Logistics or Freight Service
Airborne Solutions, Inc.	Logistics or Freight Service
Alaska Air Forwarding	Logistics or Freight Service
Alaska Packaging, Inc.	Logistics or Freight Service
Arctic Circle Enterprises, LLC	Logistics or Freight Service
Brooks, William & Lorraine	Logistics or Freight Service
Commodity Forwarders, Inc.	Logistics or Freight Service
FWL Logistics, Inc.	Logistics or Freight Service
Glacier Investments, LLC	Logistics or Freight Service
Hilde, Dean And Christy	Logistics or Freight Service
Krogstad, Sam & Rebecca	Logistics or Freight Service
L Metro LLC and Nicolai-Alaska L	Logistics or Freight Service
Midnight Sun Logistics	Logistics or Freight Service
Nicolai-Alaska LLC	Logistics or Freight Service
Parcelpool.com	Logistics or Freight Service
Perez Move Management, Inc.	Logistics or Freight Service
Quad Ventures	Logistics or Freight Service
Rapid Action Mailing Service, Inc.	Logistics or Freight Service
Sramek Aviation Services LLC	Logistics or Freight Service
S-Tec Corporation	Logistics or Freight Service
TGI Freight	Logistics or Freight Service
UPS Supply Chain Solutions, Inc.	Logistics or Freight Service
WPX Courier, LLC	Logistics or Freight Service
Big Hangar LLC	Private hangars
Blue Sky Hangars, LLC	Private hangars
Erhart, Lewis And Dorothy	Private hangars
Hately, William	Private hangars
Miller, C G	Private hangars
Alaska Air Taxi LLC	Regional Carrier
Alaska Central Express	Regional Carrier
Arctic Circle Air Service, Inc.	Regional Carrier
Bald Mountain Air	Regional Carrier
Desert Air	Regional Carrier
Empire Airlines, Inc.	Regional Carrier
Era Aviation, Inc.	Regional Carrier
Everts Air Cargo	Regional Carrier
Grant Aviation Inc.	Regional Carrier
Iliamna Air Taxi, Inc.	Regional Carrier
Lynden Air Cargo	Regional Carrier
Natron Air, Inc.	Regional Carrier

Northern Air Cargo	Regional Carrier
Peninsula Airways Inc.	Regional Carrier
Rbg Bush Planes, LLC	Regional Carrier
Rediske Air, Inc.	Regional Carrier
Rust's Flying Service Inc.	Regional Carrier
Transnorthern, LLC	Regional Carrier
Brookstone Stores, Inc.	Retail
David Green Group, J.V.	Retail
Duty Free Shoppers, N.V.	Retail
Hudson Northwind Anchorage JV	Retail
New Zoom, Inc. dba Zoom Systems	Retail
Peoples, Inc.	Retail
Project Horizon Inc. dba Inmotion Entertainment	Retail
Sourdough Mercantile	Retail
Alaska Journal Of Commerce	Services & Amenities
Alaska Snow Removal	Services & Amenities
Alaska Waste	Services & Amenities
Anchorage Curbside Porter Services	Services & Amenities
Anchorage Daily News	Services & Amenities
APWP Inc.	Services & Amenities
Aurora Vending	Services & Amenities
Baker, Steven P.	Services & Amenities
Bushpilot Barbershop	Services & Amenities
Charles's Enterprises	Services & Amenities
Cyosk	Services & Amenities
Genuine Parts Company dba Napa Auto Parts	Services & Amenities
Huntleigh USA Corporation	Services & Amenities
Interspace Airport Advertising	Services & Amenities
Moreno, George P.	Services & Amenities
Outpost, The	Services & Amenities
Paracom Inc.	Services & Amenities
Parkins Company	Services & Amenities
Pioneer Door, Inc.	Services & Amenities
Rent A Can Toilet Co Inc.	Services & Amenities
Rhm Anchorage LLC	Services & Amenities
Right Touch, The	Services & Amenities
Securetrans, Inc. dba Axiom Armo	Services & Amenities
USA Today	Services & Amenities
Vend Alaska	Services & Amenities
Yukon Fire Protection Services	Services & Amenities

Alaska Dept. of Public Safety	State Government
Alaska Dept. of Transportation & Public Facilities	State Government
CCR, LLC	Terminal Support
Alaska Aviation Heritage Museum	Tourism
Alaska Railroad Corporation	Tourism
Alaskan Tour Guides, Inc.	Tourism
Bags For Cruises, LLC	Tourism
Katmai Lodge LLC	Tourism
Premier Alaska Tours Inc.	Tourism
Prince William Sound Science Cen	Tourism
Royal Celebrity Tours, Inc.	Tourism
Royal Highway Tours, Inc. dba Holland America-Princess Alaska	Tourism
ACS Of Anchorage, Inc.	Utility
ACS Wireless Inc.	Utility
Atlas Tower LLC	Utility
Chugach Electric Association Inc.	Utility
Dobson Cellular System, Inc.	Utility
GCI Communication Corporation	Utility
GTP Towers li, LLC	Utility
Matanuska Telephone Association	Utility
Nextel West Corp.	Utility
Procomm Alaska, LLC	Utility

Source: ANC.