Planning for the future, together

DAAPS Population and Economic Forecast

August 2025

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Abbreviations

ATIA – Alaska Travel Industry Association

CDP – Census Designated Place

CEDS – Comprehensive Economic Development Strategy

CUA – Commercial Use Authorization

DAAPS – Denali Area Airport Planning Study

DNP – Denali National Park and Preserve

DOL&WD – Alaska Department of Labor and Workforce Development

DOT&PF – Department of Transportation and Public Facilities

FAA – Federal Aviation Administration

HAP – Holland America Princess

IATP – Interior Alaska Transportation Plan

J-1 visa – Cultural Exchange Visitor Visa

N/A – Not Applicable

NPS – National Park Service

RCI – Royal Caribbean International

TDD – Telephone Device for the Deaf

1. Introduction and Background

This population and economic forecast is for the Denali Area Airport Planning Study (referred to as DAAPS or the Denali area) and builds on the published population and economic forecasts from the Interior Alaska Transportation Plan (IATP) for the period 2025-2045. Where the IATP provided low, medium, and high population and economic forecasts at the regional and community level based on planned and possible economic activity (i.e., drivers), the DAAPS forecast estimates population change at the community level in the Denali area for a 20-year period. It also considers economic drivers in the hospitality sector based on expected aviation service changes over the same period.

The forecast is informed by regional and community planning documents, community input, and available population and hospitality data to support transportation and community planning efforts. Population information provided by the Alaska Department of Labor and Workforce Development (DOL&WD) at the borough and census level was used to develop a community-level population forecast for the communities within the DAAPS, the City of Anderson, Cantwell Census Designated Place (CDP), Denali Park CDP, Ferry CDP, Healy CDP, Lake Minchumina CDP, and the remaining population in the Denali Borough.

Generating realistic local population projections is challenging because many communities in the area are very small. The University of Florida method, used in the IATP and for DAAPS, was developed for population estimates in small communities and is described in Appendix A. For the DAAPS, economic drivers used for forecasting are limited to changes identified in the IATP and aviation services in the Denali area. Data used for aviation services and the hospitality sector are sourced from a wide variety of resources, including local and regional stakeholders and plans, DOL&WD economists, the National Park Service (NPS), industry and sector experts, reports, and databases.

2. Regional Setting

The Denali region's economy, which is based on natural resources, has undergone a gradual shift from mining to tourism while maintaining a diversified economic base, as discussed in Appendix B. The Denali Borough Comprehensive Plan [Denali Borough, 2015] identifies a stable economic foundation built on a combination of coal mining (Usibelli Coal Mine), power generation (Golden Valley Electric Association), Federal installations (Clear Space Force Station), and tourism centered around Denali National Park (DNP). This diversity has provided the region with economic resilience that is not tied to any single sector, although the hospitality industry has increasingly become the primary seasonal economic driver (Denali Borough, 2015). The Fairbanks North Star Borough Comprehensive Economic Development Strategy (CEDS) identifies significant opportunities in "increased collaboration between neighboring destinations" and potential for "Arctic and year-round tourism" development, which would help address the extreme seasonality that characterizes the region. However, these documents also note persistent challenges,

including "aging infrastructure, limited direct flights to Interior Alaska, supply chain disruptions, and workforce shortages" that constrain industry growth [FNSB, 2022].[1]

Transportation has historically played a defining role in the region's development. The Alaska Railroad established the first reliable access to the Denali area in 1923, laying the foundation for tourism development that significantly predated the completion of the Parks Highway in 1971. Aviation infrastructure within the DAAPS has historically been limited to small airstrips primarily serving flightseeing operations, emergency services, and resource extraction rather than scheduled passenger service [DOT&PF, 2025a]. This pattern of transportation development has created a system heavily oriented towards seasonal, road-based tourism with limited multi-modal options.

As noted, this forecast focuses on changes in the aviation sector and their economic implications for the region's hospitality sector. However, regional and community input from the IATP and DAAPS stakeholder interviews and analysis have identified other economic drivers, some of which are considered in the forecasts and some that are critical but not part of this analysis. The economic drivers identified are outlined in Table 2-1.

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[1] The Denali Borough does not currently have a CEDS.

Table 2-1. Economic Drivers Identified in IATP and DAAPS Economic Research

	Economic Driver	IATP	DAAPS Stakeholder Feedback	Notes
	Alaska Liquefied Natural Gas Pipeline	Yes	Yes	Included in the IATP economic forecast and frequently mentioned in DAAPS interviews.
	Clear Space Force Station	Yes	Yes	Identified but not included in IATP economic forecasts because of insufficient data, identified as necessary to track for future economic effects in DAAPS interviews.
	Denali Regional Airport	Yes	Yes	Identified but not included in IATP economic forecasts because of insufficient data, identified but not included because of DAAPS community input.
	Denali Area Hotel Development	No	Yes	Otto Lake and increasing hotel capacity at the park entrance in the near term and potentially for the medium term, 5 to 10 years.
	Drone, UAS/UAV Industry Development	Yes	Yes	Potential economic activity and investments for testing UAS/UAV technology in the DAAPS were identified in DAAPS interviews but not included in the forecast.
	Energy Infrastructure Changes	Yes	Yes	Potential economic activity changes because of the closure or continuation of the Golden Valley Electric Association Healy Plan, as well as the development of solar and other technologies identified in DAAPS interviews but not included in the forecast.
	Federal Hiring Freeze	No	Yes	Impacts on DNP staffing and services that were identified in DAAPS interviews but not included in the forecast.
	Pretty Rocks/Denali Park Road Closure	No	Yes	Regularly mentioned in DAAPS interviews on impacts on the visitor industry in DAAPS, re-opening in 2027, included in the forecast.
	Recreation Economy Investments	No	Yes	Planning and investments in transportation, pedestrian pathways, and more to improve access and increase the use of recreation facilities in the DAAPS. Identified in DAAPS interviews and Denali Borough planning documents but not included in the forecast.

3. Hospitality Sector Overview

When considering aviation services and their impact on the regional economy, the DAAPS focuses on the hospitality and tourism sectors. The high-level characteristics and trends associated with this industry are identified in the following sections and explored in detail in Appendix B.

## 3.1 State of Alaska and Regional Visitor Volume

Alaska visitor numbers have shown a steady increase (excluding the pandemic years) over the last decade. 2023 saw both record cruise passenger and railroad ridership numbers. Visitor numbers to the Denali region also show a similar steady increase; however, there are indications that the area is receiving a decreasing share of visitors to Alaska. In the summer of 2022 through the winter of 2023, 20% of all Alaska visitors traveled to the Denali area. During the 2022–2023 season, the Interior region had a smaller share of visitors compared to previous seasons.

Traveling to the Denali region is relatively time-consuming compared to itineraries closer to Anchorage, such as those in the Kenai Area, which offer the opportunity to visit many locations and attractions in just a few days. There is some indication that, overall, visitors to Alaska may be opting for shorter trips. Vanessa Jusczak of the Denali Chamber of Commerce reported this as a standard current perception on tourism industry discussion [Jusczak, 2024]. The Alaska Travel Industry Association's (ATIA's) 2022–2023 Visitor Profile indicates that the average length of stay for visitors in Alaska has decreased, from 9.2 days in 2016 to 8.5 days in 2022 [Appendix B, Reference 27, 2025].

There are also indications that the post-pandemic recovery of visitor numbers for Denali National Park and Preserve (DNP) has been slower than other national parks, as depicted in Figure 3-1. For comparison, Glacier Bay National Park welcomed 703,659 visitors in 2023, surpassing its 2019 total of 672,087. DNP has not reached 2019 visit levels, as indicated by October's employment numbers, traffic counts, and DNP visits in Figure 3-1. Whether this is a trend or a short-term change because of specific events, such as the partial closure of the DNP Road and the Riley Fire in 2024, is currently unclear.

Figure 3-1. Annual Visitation to Denali National Park (2013–2024) [NPS, 2025a]
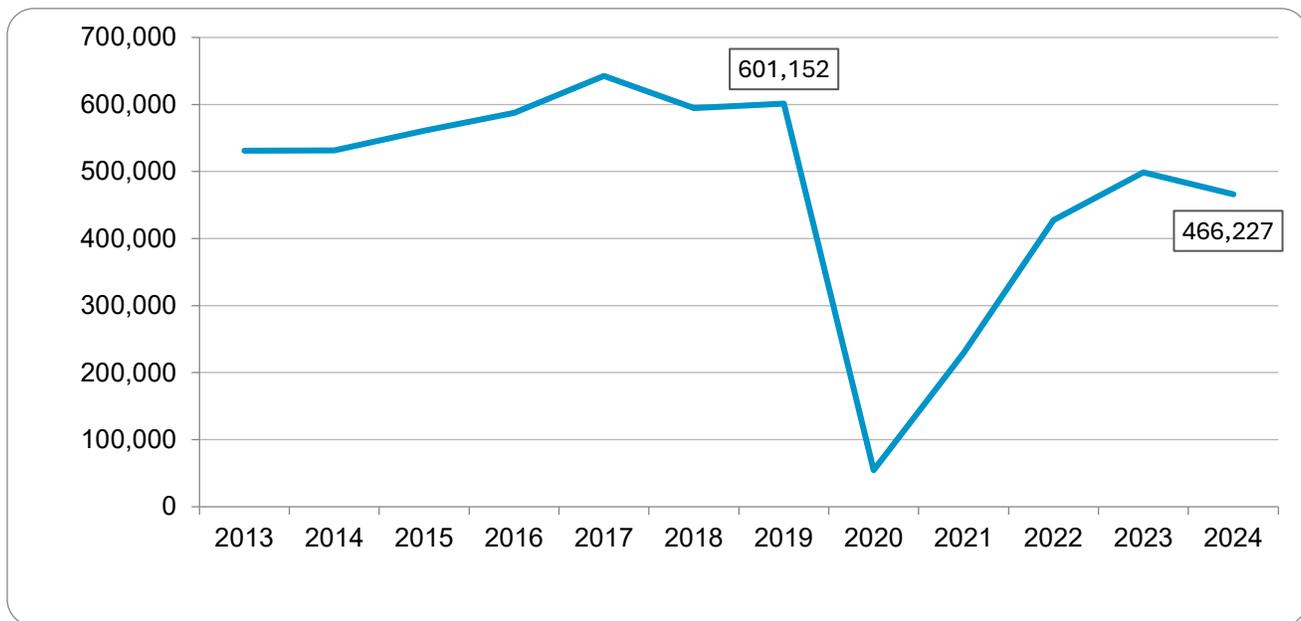
An important consideration when comparing the visitation numbers across the years and locations is how DNP counts visitors. There is no fixed gate or location where every visitor in a vehicle is counted. Instead, visitors access the park in various ways; therefore, DNP reports visits based on a calculation developed (most recently) from a 2011 study of park visitation. Changes in visitor patterns (e.g., pandemic, road closure) have likely affected the accuracy of this count in reflecting the number of visitors.

3.2 Characteristics

3.2.1 Visitor Type
In the ATIA 2022–2023 Visitor Profile, visitor types are: (1) cruise passengers, if they entered or exited the state on a cruise ship; (2) guided group travelers, if they were reported as entering with an organized tour; and (3) independent, if they did not fall into the above categories.

Based on historical patterns, cruise passengers are the top visitor type in the Denali area [Ford, 2024; Jusczak, 2024]. The infrastructure reflects the following information as well:

Holland America Princess (HAP), a joint venture under Carnival Corporation & plc, owns and operates two hotels in the Denali area: Denali Princess Wilderness Lodge, located at Mile 238.5 George Parks Highway (just one mile from the entrance to DNP), and the Holland America Denali Lodge (formerly McKinley Chalet Resort), situated in Denali Canyon along the Nenana River (less than two miles from the park entrance). HAP brings in guests via bus and train as part of their integrated cruise and land tour packages, and these hotels are not subsidiaries of any other hotel chain; they are operated directly by HAP to serve their cruise and tour guests.

Premier Alaska Tours handles a large portion of other group travel, including cruise passengers from various cruise lines (e.g., Norwegian, RCI, Disney) by bus and train.

Other local hotels, such as those owned by the JL Group (three hotels) and Aramark's Denali Park Village at Mile 231.1 Parks Highway, are independently owned and are largely filled by Premier Alaska Tours guests, not by those from Princess or HAP.

HAP's substantial footprint in the Denali region includes area hotel ownership, integrated guest transportation, and ongoing investment in hospitality infrastructure, making it a central force in shaping the local tourism economy.

Interestingly, the analysis of the ATIA 2022–2023 Visitor Profile revealed that among visitors to Alaska, 43% were cruise passengers, 6% were part of guided groups, and 50% were independent travelers. From that same data, the breakdown for Denali area visitors was 26% cruise, 12% guided group, and 62% independent. Note that these values represent a period still experiencing significant effects from the pandemic. In 2018–2019, cruise passengers were estimated to comprise the majority (55%) of visitors to Alaska. During the recent complete season of data collection from Summer 2023 to Spring 2024, cruise passengers constituted most Alaska visitors, accounting for 56%.

While a trend towards more independent travelers and a growth in guided group travelers in the Denali region is suggested and identified in DAAPS interviews, additional data will be needed to confirm a trend toward diversifying visitor types in the area.

3.2.2 Transportation Modes

Visitor travel between Denali National Park (DNP), Anchorage, and Fairbanks is primarily by motorcoach, followed by the Alaska Railroad. For 2024, arrival data is taken directly from DNP visitor statistics and shows that approximately 71% of visitors arrived by motorcoach, 23% by rail, and 5% by air. Departure percentages were calculated using Alaska Railroad data to adjust the share of visitors departing by motorcoach and train: about 50% departed by motorcoach, 44% by rail, 1% by private vehicle, and 5% by air.

Note that while arrival numbers are specific to DNP visitors, the departure numbers are estimates based on transportation data and may include some individuals not strictly counted as DNP visitors, such as Denali area workers, residents, or those traveling straight through to Fairbanks by train.

All percentages presented are estimates intended to provide a general overview of how visitors travel to and from DNP by mode of transportation. Figures 3–2 through 3–4 should not be interpreted as precise counts of individual visitors arriving in the Denali area via air, train, motorcoach, or private vehicle for the purpose of visiting the park. The NPS annually reports visitor numbers by air, train, and private vehicle, with train arrival and departure data also reported by the Alaska Railroad. The percentage of visitors arriving by motorcoach was derived by subtracting the total of these reported modes from the NPS's overall annual visitor count. The motorcoach category is assumed to encompass all forms of group transportation, including buses, vans, and similar vehicles serving DNP. Visitor

statistics are estimated by the NPS using an algorithm that may count multiple visits by the same individual. As a result, the reported motorcoach numbers likely include both regional arrivals/departures and an unknown number of trips between DNP and nearby lodging or service areas. Air travel to and from DNP includes, and likely consists primarily of, glacier landing flightseeing tours operated by air taxi companies.

Many Denali Area visitors arrive from the Anchorage area and then depart from Alaska or the Interior by air to Fairbanks. Visitor sensitivity to travel time and the Alaska Railroad ticket costs likely explains the greater number of motorcoach arrivals to and train departures from DNP. Travel between Denali and Fairbanks is approximately half as costly in terms of time and cost as travel between Anchorage and Denali. Air transport to and from the region remains limited. Healy River Airport (HRR) recorded approximately 1,300 operations in 2023, primarily supporting flightseeing and emergency services rather than passenger arrivals or departures [DOT&PF, 2025b].

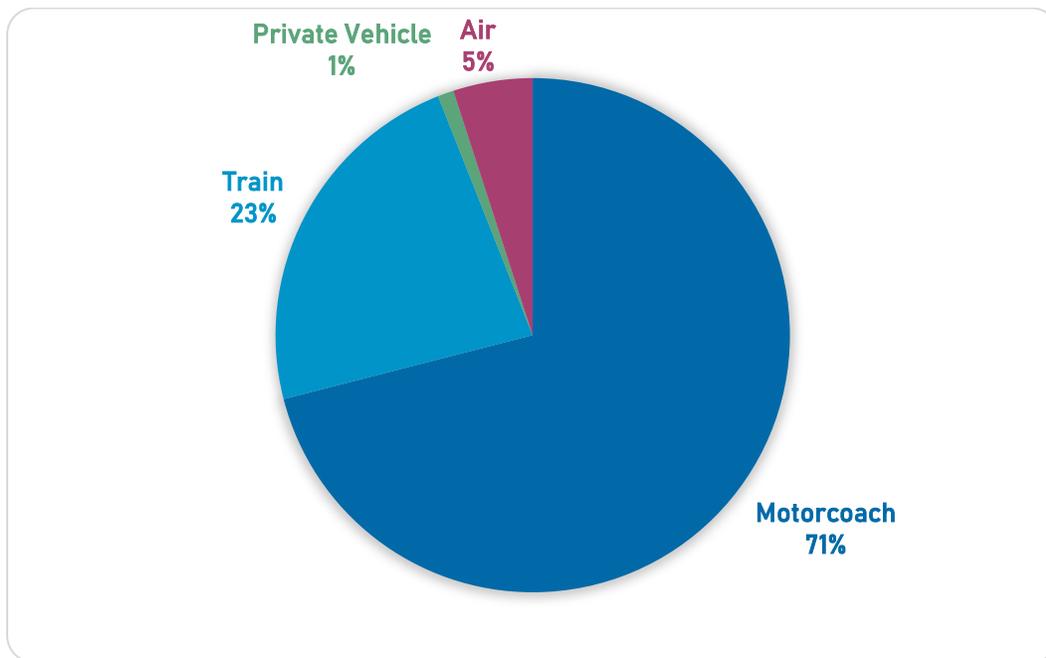Figure 3-2.   Denali National Park 2024 Arrivals by Transportation Mode[2] [NPS, 2025a, b; Terry, 2025

Private Vehicle 1%
Air 5%
Train 23%
Motorcoach 71%

Figure 3-3. Denali National Park 2024 Departures by Transportation Mode[2] [NPS, 2025a, b; Terry, 2025]

Private Vehicle 1%
Air 5%
Train 44%
Motorcoach 50%

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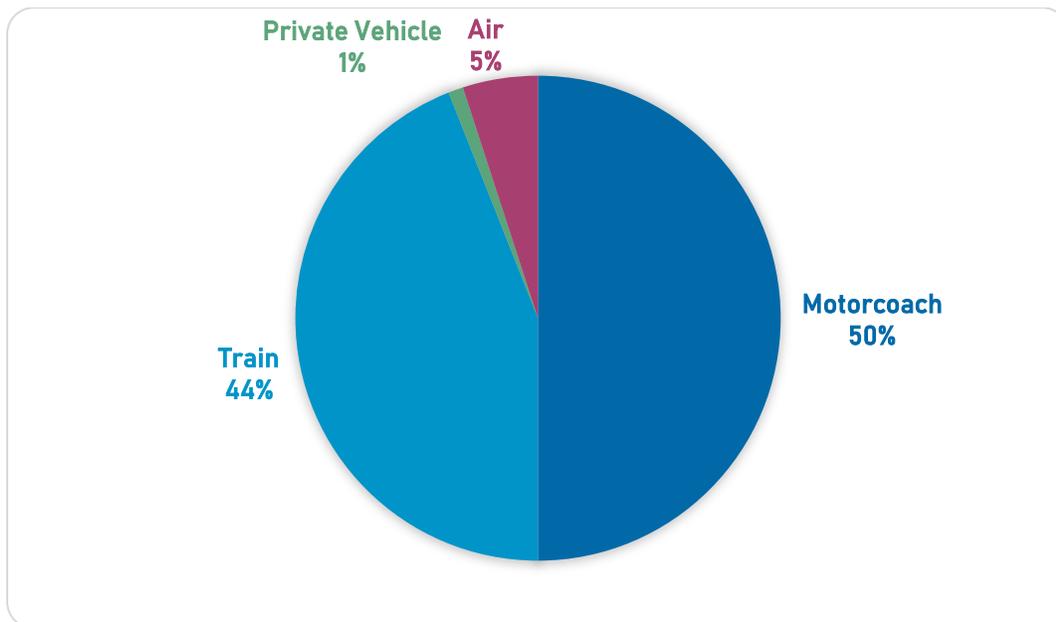
[2]   The motorcoach category is assumed to encompass all forms of group transportation, including buses, vans, and similar vehicles serving DNP. Motorcoach numbers include an unknown percentage of local travel related to accessing DNP from lodging and other locations. Air travel to/from DNP likely primarily represents glacier landing flightseeing tours operated by air taxi companies. Most of these flights originate outside the DAAPS area (largely from Talkeetna) and do not make use of the airstrips included in this study. These flight numbers should not be interpreted as evidence of direct air traffic to/from the DAAPS area.

Figure 3-4.   *Denali National Park Arrivals by Transportation Mode as a Percent of Total Visitors, 2015-2024[2] [NPS, 2025a, b; Terry, 2025]*
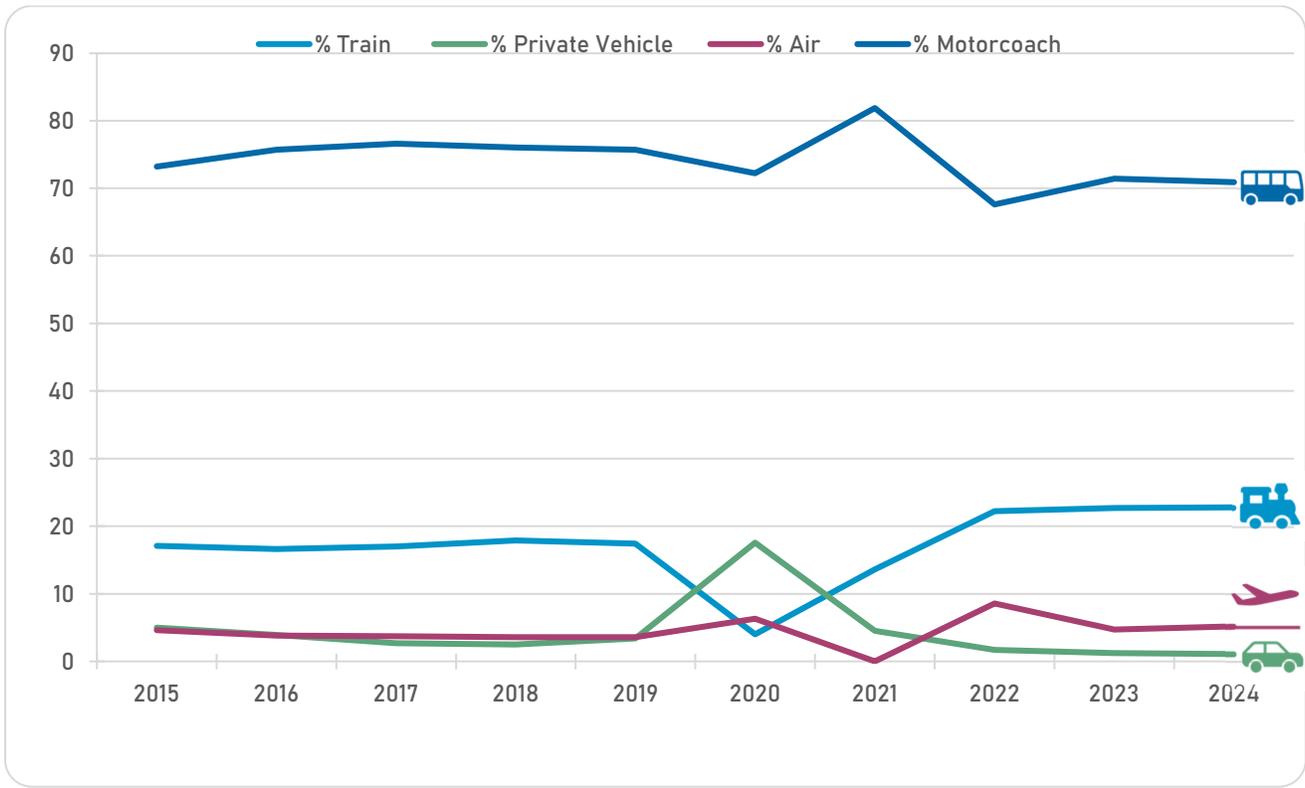
3.2.3 Seasonality

DNP maintains full operations throughout the summer season, from mid-May to mid-September, with minimal access and services available for the remainder of the year. Most hospitality sector retail and service operations in the Denali area also close or significantly limit hours from mid-September to mid-May. As in the rest of Alaska, the number of winter visitors to the Denali area has been increasing. DNP saw an approximately 300% increase in winter visitors from the fall of 2012 to the spring of 2019, equivalent to about 3% of the summer visitors for 2018. From the fall of 2019 to the fall of 2024, winter visitor numbers increased by approximately 200%, equivalent to about 8% of the summer visitors in 2024. Although these winter visitors represent a significant change, they still account for a tiny portion of the overall visitors (Figure 3-5).

Overnight lodging in the Denali area is also highly seasonal. Denali Borough accommodation tax data show that 98% of taxed lodging nights occur between April and September.

Figure 3-5. *Denali National Park 2023-2024 Visitation by Month [NPS, 2025a]*

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2023	1,683	2,662	5,426	5,714	34,134	116,853	138,246	133,255	50,544	5,282	2,437	2,486
2024	2,265	3,828	9,651	7,485	35,884	116,208	98,514	132,364	48,019	6,405	2,428	3,176
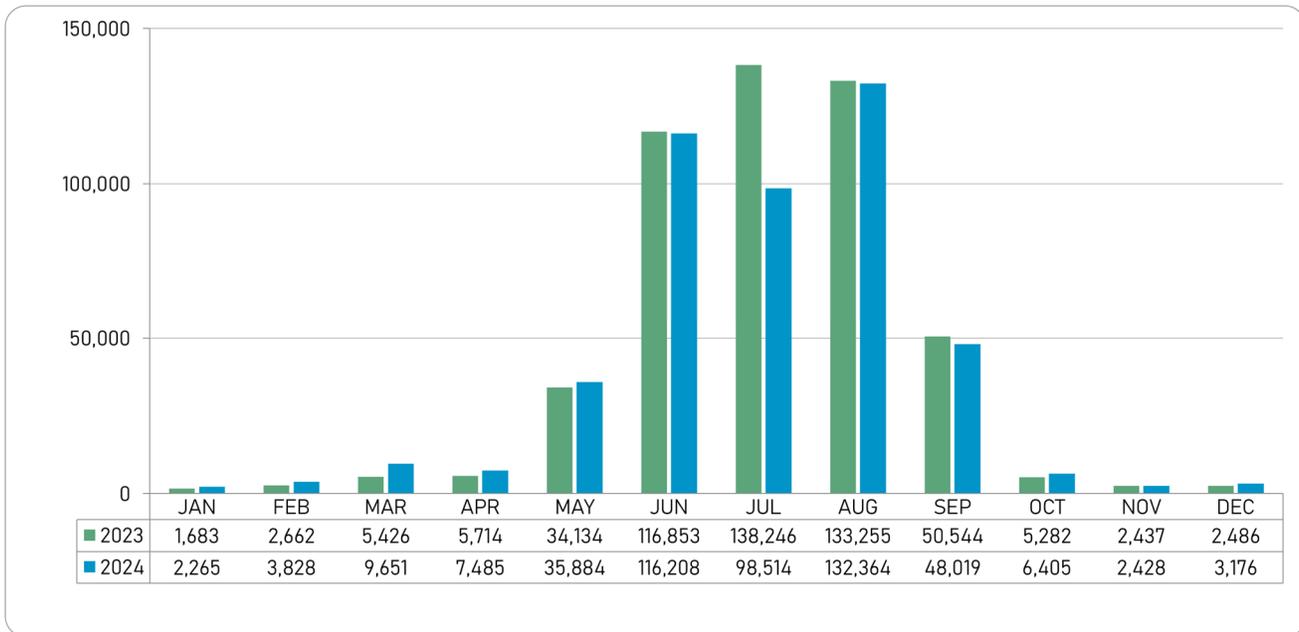
Note: The data labels display 2024 numbers. The drop in visitation in July 2024 coincided with the park closure on July 1-10 because of the nearby Riley Fire [NPS, 2024].

3.2.4 Hospitality Workforce

The Denali area visitor industry is intensely seasonal. Even in Alaska, where seasonal employment is expected, Denali Borough stands out for the stark difference between its winter and summer job numbers. The Denali Borough's seasonal unemployment exhibits a sharp annual fluctuation pattern, which contrasts significantly with the more gradual but precise seasonal unemployment rate in Alaska. International summer work travel students (Cultural Exchange Visitor Visa [J-1 visa]) accounted for an estimated 32% of the Denali area's leisure and hospitality seasonal workforce in 2024. The seasonal workforce in the Denali Borough, which is primarily employed in the hospitality sector, exceeds 200% of the borough's resident population. The influx and outflow of seasonal workers bracket the peak visitor periods for the region, as indicated in Figure 3-6.

Many individuals, including both out-of-state workers and in-state seasonal residents, travel to Denali each year for summer employment. While this does not reflect a seasonal change in population, it does indicate a significant seasonal increase in job numbers, with over 2,000 adults working in the area for 4 to 5 months. Most of these workers rely on employer-provided housing or temporarily close their own businesses for the winter. Many of these individuals lack access to personal transportation and housing options beyond what their employer can provide. The IATP input and DAAPS key informant interviews (discussed in the next section) identify significant challenges in meeting this variation in the local population. For transportation, no public transit serves local communities in the Denali area. Several bus and shuttle services, which are run by DNP concessionaires, tour operators, and hotels, serve specific visitor activities and locations.

Figure 3-6. Denali Borough Monthly Employment Numbers as Percentage of the Total Borough Population [DOL&WD, 2025]
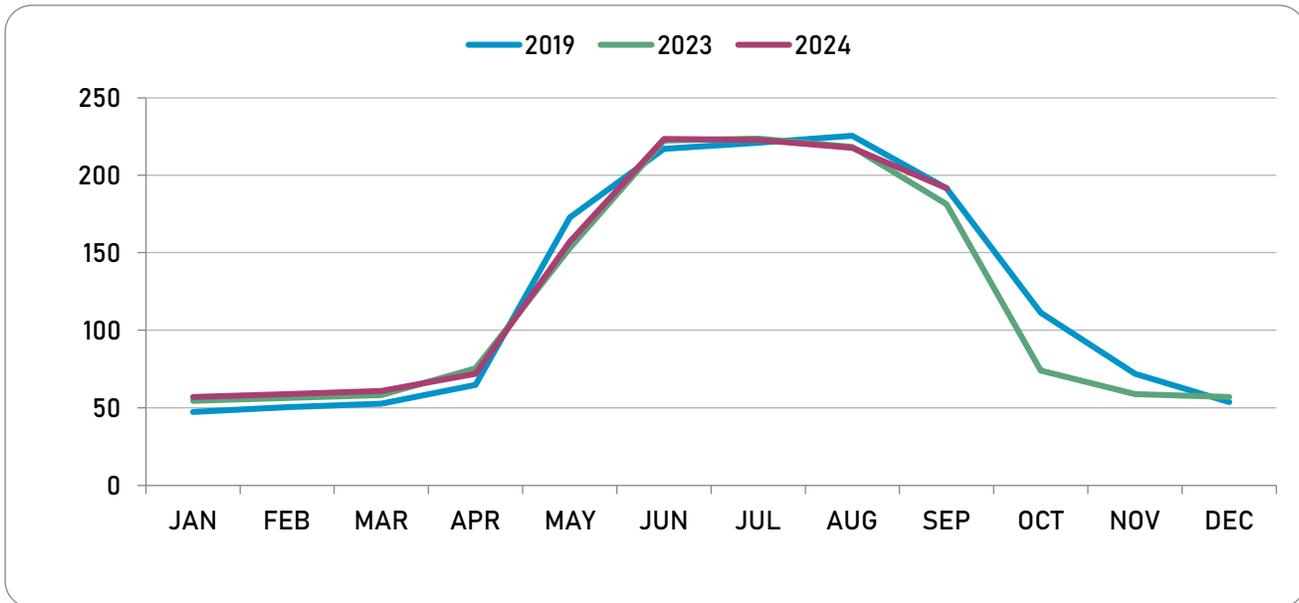
As identified in key informant interviews, there is only one local taxi/shuttle service and approximately 10 locally available rental vehicles serving the entire region. For housing, the Alaska Housing Finance Corporation's 2018 Housing Assessment report on the Denali Borough is instructive, although dated, as it is based on data from 2016. The Denali Borough report showed a "housing gap" of 59 in 2016, indicating that 59 new housing units were needed to meet demand because of overcrowding and the population size at that time. Although the current Denali Borough resident population is below the number used to estimate the 59-unit housing gap, the addition of over 2,000 temporary workers each season for summer employment puts the Denali Borough back at a gap of more than 60 housing units from mid–May to mid–September each year. Interviews with employers in the Denali area reinforce the existence of a significant housing gap during this season, as well as the resulting constraints on operational capacity and potential for growth

3.2.5 Accommodation Inventory

The Denali area offers a range of highly seasonal accommodation options for visitors to the region. This inventory reflects accommodations and operators active across the Denali Borough, including but not limited to the communities of Healy, Cantwell, and those adjacent to the DNP. The data includes borough-wide active listings and permitted commercial operations under the jurisdiction of the NPS (Table 3-1). Additional details are provided in Appendix C.

Table 3-1. Accommodation Inventory

Type	Estimated Units	Peak Season	Year-Round Availability
Hotels and Lodges	1,480	Mid-May to early September	Minimal
Campgrounds and RV Parks	618	Mid-May to mid-September	Limited (Riley Creek open year-round)
Vacation Rentals/B&Bs	275	May to September	Approximately 15 listings remain open year-round

3.2.6 Tour Operator Inventory

There are approximately 80 companies authorized to provide commercial visitor services within DNP, according to the NPS. These services operate under various agreements, including Concession Contracts, Permitted Services, and Commercial Use Authorizations. Some businesses are limited to specific areas, such as designated Wilderness zones or developed areas within the park and preserve. The Denali Borough also supports an estimated 40 or more active tour operators. See Table 3-2 for types and seasonality of tour operators.

Table 3-2. Tour Operator Inventory

Operator Type	Seasonal Availability
Flightseeing and Helicopter	May to mid-September
Bus/Wildlife Tours	Mid-May to mid-September
Rafting/ATV	Late May through Labor Day
Dog Sledding/Aurora	Select operators only, December–March

3.3 Hospitality-Related Planning and Infrastructure Investments

The visitor industry in Alaska and the Denali region, specifically, is growing. More visitors are coming, and although still concentrated in the summer, the numbers are increasingly spread throughout the year. In response to this, the Holland America Line is planning a $70 million Denali Lodge Expansion. This substantial 3-year investment near the entrance to DNP will expand accommodation capacity, which includes remodeling 48 guest rooms in the Holland America Denali Lodge (2026) and constructing a new building to add 120 suites and standard rooms (2027).

This expansion directly addresses "the accommodations crunch in Denali National Park" and will significantly increase lodging capacity "at the doorstep of Denali National Park." The project aims to "meet the growing interest in combined land and sea Cruisetours" while supporting Alaska's broader tourism economy. This investment demonstrates strong confidence in the region's continued tourism growth [Kallosh, 2025].

Additional plans and initiatives have been completed and are underway to expand and add to the community infrastructure that serves residents and visitors. These plans include the following:

- Parks Highway Separated Paths Project: This project will create separated, nonmotorized pathways that connect residential areas with businesses, seasonal restaurants, lodging, and recreational opportunities. It will also conduct drainage improvements, roadside hardware installations, potential utility relocation, and pedestrian intersection crossing improvements. The project addresses "increasing visitation to the Denali Borough," which "translates to an increase in pedestrian tourists and seasonal workers who use this section of the Parks Highway." These pathways will "improve the pedestrian experience and increase safety for pedestrians and vehicular traffic," potentially encouraging tourists to explore more areas on foot and enhance their overall experience [DOT&PF, 2025c].

- Community and Outdoor Recreation Plan: Completed in March 2025, this plan outlines comprehensive recreational infrastructure developments, including dedicated highway bike paths and multi-purpose trail systems, enhanced connectivity with DNP, and improved active transportation infrastructure. The focus on connectivity with DNP suggests an integrated approach to tourism development that links park experiences with broader regional offerings [Denali Borough, 2025].

4. Key Insights from DAAPS Economic and Hospitality Interviews

To understand the complex dynamics of tourism, transportation, and infrastructure across the Denali area, structured interviews were conducted with 20 stakeholders representing the following four organization types:

1. Neighboring Communities/Landowners (5 Interviews): Nenana Native Association, Native Village of Cantwell, Ferry Community Corporation, Toghotthele Corporation, and local business owners.

2. Denali Community Organizations (5 Interviews): Denali Borough Community Development and Planning, Denali Chamber/Discover Denali, Denali Borough Planning Commission, Denali Citizens Council, and the Denali Borough Mayor.

3. Visitor Industry Businesses/Development Organizations (6 Interviews): Explore Fairbanks, ATIA, Fairbanks Economic Development Corporation, NPS, Doyon Limited, and Keys to Denali.

4. Aviation Services (4 Interviews): Denali Air, Alaska Tailwheel, Wing & A Prayer Aviation Inc., and Fly Denali.

The interview process employed a semi-structured approach, using consistent guiding questions while allowing flexibility to explore emerging themes. Each interview focused

on five key areas: future projects and anticipated changes, trends in visitor traffic, visitor arrival methods, seasonality patterns, and aviation infrastructure constraints. All the interviews were recorded (with permission), transcribed, and then systematically coded using thematic analysis to identify recurring patterns and areas of consensus or divergence across stakeholder groups. These interviews yielded the following consistent themes:

- Transportation Infrastructure Gaps: Multiple stakeholders across all four categories identified significant transportation constraints in the Denali area. The lack of scheduled air service forces visitors to travel first to Anchorage or Fairbanks before continuing to Denali by ground transportation, adding considerable time and complexity to the journey. Local transportation options within DAAPS are limited, with interviewees noting only one local taxi/shuttle service and approximately 10 rental vehicles available for local use, serving the entire region. As one tour operator explained, "The transportation gap is enormous—we have visitors who arrive without realizing they need to pre-arrange every aspect of local movement, and then they're stuck paying $40 per person for a 10-mile shuttle ride."

- Housing Crisis as Growth Barrier: Housing shortages for both workers and visitors were consistently cited as the primary constraint on business operations and growth potential. The conversion of long-term rentals to short-term accommodation has exacerbated this problem, with one community leader saying, "We've lost about 45 long-term rentals to Airbnbs since 2019, and those units are critical for housing our seasonal workforce." Multiple employers reported turning away potential staff because of housing limitations, with one stating, "We can only hire as many people as we can house, and that's not enough to meet visitor demand in peak season."

- Seasonal Extremes: The pronounced seasonality of tourism creates significant challenges for the workforce and infrastructure. Nearly all interviewed businesses reported reaching housing and infrastructure capacity during the peak summer months, in contrast to severe underutilization in winter. The lack of winterized facilities (e.g., accommodations, dining, activities) was identified as a significant barrier to expanding shoulder and winter seasons despite growing interest in aurora viewing and winter recreation. As one operator noted, "There are only two year-round restaurants in the entire area. Without basic services, it's hard to attract winter visitors."

- Aviation Infrastructure Limitations: Current aviation facilities in the Denali area face significant constraints and limitations. Healy River Airport (HRR) is affected by wind shear risks, meaning sudden and unpredictable changes in wind speed or direction that can endanger aircraft during takeoff and landing, and operates under an expired lease with the Alaska Railroad. Summit Airport, though potentially valuable for Cantwell access, lacks winter maintenance, a gap multiple stakeholders cited as critical for both tourism and emergency services. As one aviation stakeholder

explained, "When Summit Airport is snowed in, medevac patients from Cantwell have to be transported by ambulance to Healy—that's a 90-minute trip in good conditions, much longer in winter weather." Private airstrips in the area play a key role in flight-seeing, but constrained locations may limit expansion capability.

- Park Access Constraints: The closure of portions of Park Road because of the Pretty Rocks landslide (until 2027) has concentrated visitor activity to the vicinity of the park entrance, potentially reducing the quality of the visitor experience and limiting the dispersal of visitors throughout DNP. Several stakeholders noted that this has changed visitation patterns and reduced the average length of stay, creating infrastructure pressures at the entrance area while underutilization of facilities and areas deeper in the park.

5. Comparable Communities Analysis

To contextualize the development potential and constraints for the hospitality sector and communities in the Denali area, an analysis of comparable gateway communities provides valuable insights.

5.1 Estes Park, Colorado (Gateway to Rocky Mountain National Park)

Estes Park serves as one of the most instructive comparisons for Denali's gateway community challenges. With 5,858 permanent residents, the town transforms dramatically each summer as Rocky Mountain National Park's 4.1 million annual visitors create massive fluctuations in demand for seasonal businesses, hotels, restaurants, and retail establishments. The absence of a commercial airport—with Denver International Airport 75 miles away—mirrors Denali's logistical challenges, where visitors must navigate significant distances from major airports.

Tourism generates substantial economic multiplier effects through direct employment in hospitality and retail sectors, plus indirect employment through local supply chains. However, extreme seasonality creates volatile employment markets with most jobs available only during peak summer months. The town faces acute seasonal worker housing shortages, forcing employees to commute from distant communities or live in substandard accommodations while rising property values price out local residents. Infrastructure strain during peak visitation pushes roads, parking, water systems, and waste management to capacity, creating severe traffic congestion and parking shortages. Despite heavy investment in shuttle systems and transportation management programs developed with the NPS, balancing millions of visitors with community livability remains an ongoing challenge.

5.2 West Yellowstone, Montana (Gateway to Yellowstone National Park)

West Yellowstone represents one of the most extreme examples of seasonal gateway community economics. With only 1,272 year-round residents serving as the busiest entrance to Yellowstone National Park's 4.5 million annual visitors, the community's tourism dependency is nearly total. Most businesses operate only 4 to 5 months annually

before closing during harsh winter months, creating an economic ecosystem that hibernates from late fall through early spring, except for snowmobile and winter sports businesses.

The town's seasonal airport operates only during summer with limited commercial service, while the year-round Bozeman Yellowstone International Airport sits 90 miles away, creating transportation challenges for visitors and residents. This remoteness, combined with extreme seasonality, creates a labor market almost entirely dependent on seasonal workers facing severely limited affordable housing options. During peak season, businesses experience intense demands that must generate annual income in just a few months, creating pressure to maximize revenue while planning for long winter closures. Strategic investments in winter tourism infrastructure have aimed to extend the economic season, but winter visitation remains a fraction of summer levels.

5.3 Springdale, Utah (Gateway to Zion National Park)

Springdale exemplifies tiny gateway communities that manage massive tourism influxes. With 592 residents and Zion National Park's 4.6 million annual visitors, the town has one of the highest visitor-to-resident ratios in the United States, fundamentally altering community character and daily life. Lacking a commercial airport, with St. George Regional Airport 50 miles away and Las Vegas 170 miles away, nearly all visitors arrive by car or shuttle, creating intense pressure on the limited road infrastructure and parking within small town boundaries.

Rapid tourism growth has driven dramatic property value increases, pricing out long-time residents while seasonal workers struggle to find affordable housing within commuting distance. The community has transformed from a small rural town to a tourism-dependent economy where local services increasingly cater to visitors rather than residents, creating tensions between economic benefits and community livability. Springdale's mandatory shuttle system has become a nationally recognized visitor management model, successfully reducing traffic congestion and parking pressures while providing controlled visitor experiences that protect park resources. However, the system requires ongoing coordination between the town, NPS, and private operators, illustrating the complex partnerships necessary for effective gateway community management.

5.4 Fayetteville, West Virginia (Gateway to New River Gorge National Park and Preserve)

Fayetteville's experience illustrates rapid transformation following a national park designation. With 2,887 residents, the town has experienced dramatic tourism surges since New River Gorge gained national park status in 2020, with annual visitation reaching 1.7 million visitors. This growth has accelerated development pressures and created challenges for a community unprepared for national park gateway infrastructure demands.

Without a commercial airport within 50 miles, most visitors arrive by car, creating traffic patterns and parking demands exceeding infrastructure design capacity. Tourism surges

have increased demand for lodging, dining, and recreation services, leading to new business development while straining water, sewer, and emergency services. Rising housing costs from the increased demand for visitor accommodations and worker housing create affordability challenges for residents. Fayetteville has emphasized collaborative planning with the NPS and local stakeholders, engaging in proactive efforts to address land use, public services, and environmental protection. This approach includes zoning updates, infrastructure investment planning, and workforce development programs designed to help residents benefit from tourism opportunities while maintaining community character and environmental sustainability.

5.5 Key Insights for Comparative Analysis

These four communities demonstrate how gateway communities face similar challenges regardless of their specific context: extreme seasonality, infrastructure strain, workforce housing shortages, and the need to balance economic benefits with community character preservation. The tourism multiplier effects in these communities are significant but come with substantial costs and challenges that require ongoing management and investment. Each community has developed unique strategies for addressing these challenges, from shuttle systems and transportation management to collaborative planning and infrastructure investment, providing valuable lessons for other gateway communities like the Denali Borough and areas facing similar pressures.

The economic dependence on a single tourism driver makes all these communities vulnerable to external shocks, whether from natural disasters, economic downturns, or changes in travel patterns. Their experiences highlight the importance of diversification strategies, infrastructure investment, and collaborative planning in building resilient gateway communities that can sustain both economic vitality and community well-being over the long term.

6. Population Forecast

The population in the Denali area, which includes the Denali Borough and the small community of Lake Minchumina in the Yukon-Koyukuk Census Area, has historically been relatively stable. The U.S. Census numbers for the Denali Borough changed by only -3.5% from 2000 to 2010 (1,893 to 1,826 residents). In more recent years, both the Denali Borough and Lake Minchumina have shown a steady decline of around 1% per year, which may indicate a reduction of as much as 15.4% in population by 2045.[3]

Table 6-1 presents the population forecasts for each community in the Denali area. Reflecting both historical trends and forward-looking estimates specific to rural Alaska, these population projections were initially developed for the 2024 IATP and have been

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[3] **These do not reflect or forecast** specific figures regarding job losses or retirements impacting Denali under the current administration.

updated and broken down to show DAAPS communities. The data sources and the method used to calculate these projections are explained in detail in Appendix A.

Table 6-1. DAAPS Population and Seasonal Worker Forecast (2025 to 2045)

Community/Region	2020 U.S. Census	2025	2030	2035	2040	2045
Anderson City	177	233	233	233	233	233
Cantwell CDP	200	190	184	176	168	160
Denali Park CDP	163	140	129	119	110	100
Ferry CDP	17	15	12	11	9	8
Healy CDP	966	935	903	866	823	779
Balance of Denali Borough	96	99	99	99	98	98
Lake Minchumina CDP	30	28	27	25	24	23
DAAPS Resident Total*	1,649	1,640	1,582	1,519	1,456	1,391
Seasonal Workforce**	N/A	2,598	2,704	2,842	2,987	3,139
DAAPS Total	N/A	4,238	4,286	4,361	4,443	4,530
DNP Visits***	N/A	498,722	542,579	590,294	642,204	642,809

*DAAPS population values vary slightly from the DOL&WD population projections for the Denali Borough because of the inclusion of Lake Minchumina CDP and the alternate methodology used for this forecast.

**Assuming a steady increase in DNP visitations and overall DAAPS, from a 1 to 5% increase in visits per year, an increase in the seasonal workforce is estimated by applying a Compound Annual Growth Rate of 1% to the reported 2023 seasonal worker estimate.

***DNP visits are estimated to return to the 2023 visit number in 2025, with an increase and subsequent plateau at the 2017 DNP visit number (the highest number for DNP visits).

The population forecasts indicate a decline in population across all DAAPS communities, except for Anderson. With its proximity to Clear Space Force Station, Anderson has consistently held a steadier population than the larger Denali Borough and is expected to maintain its current population in the future. Healy, the area's largest population center, is forecast to decline by 17.8% over the same period.

Although the population is forecast to decline, the Denali area visitor industry continues to grow. An estimate of the Denali area visitor industry workforce was calculated based on Denali Borough's summer and winter employment data from the DOL&WD. A 1% annual increase is assumed based on an analysis of seasonal worker numbers and DNP visitation numbers. Seasonal worker numbers and DNP visitations are related; however, there is also likely a lag in hiring based on expected rather than actual visits for the upcoming season, and staffing has an upper limit based on the number of food, activity, and lodging facilities in the Denali area. The growth rate is intended to be very conservative. As outlined in the next chapter, this is because of identified constraints on expanding the visitor industry and aviation forecasts that do not include regularly scheduled air service between DAAPS and Anchorage or Fairbanks.

7. Economic Forecast and Hospitality Sector Analysis

The IATP economic forecast for the Denali Borough offered three scenarios: low, medium, and high. Given the economic drivers identified in Table 2-1, which largely align with input from DAAPS stakeholders, the high scenario was used and updated with an additional community (Lake Minchumina) and population data for 2023 and 2024 for the base year sets. The estimated seasonal workforce has been added, along with an updated estimate of DNP visits. The results are captured in Table 6-1.

Additional economic forecasts showing increases in the hospitality sector because of a new regional airport and/or scheduled air service in the Denali area were not done during this analysis.

The following feedback and constraints make it clear that increased aviation services, whether through a new regional airport and/or a significant increase in scheduled air service, can only be forecasted and considered alongside real constraints to industry growth. Currently, stakeholder feedback indicates that the industry is at or near capacity.

7.1 Constraints to Visitor Industry Development

- *Denali National Park Visitor and Vehicle Limitations:* As noted in the DAAPS Aviation Forecast [DOT&PF, 2025b], the NPS carefully manages both the number of backcountry visitors and the central area attraction bus tours entering the park. Both daily and annual limits regulate the number of vehicles on Denali Park Road. This allows the park to maintain its wilderness character and opportunities for wildlife viewing, which are a significant draw. Current vehicle numbers are close to capacity, which may limit the ability to accommodate a significantly larger number of visitors on these popular tours, particularly during the peak season in early July [NPS, 2025a].

- *Resident Workforce:* The median age in the Denali Borough is increasing, reflecting both the outmigration of younger residents and the aging in place of long-term residents. This demographic shift has implications for housing needs, healthcare

services, and workforce availability —factors that all influence tourism infrastructure development.

- o The declining permanent population will likely increase reliance on seasonal workers, particularly J-1 visa holders, making workforce housing and transportation even more critical to economic sustainability. Also, the bulk of visitor services are owned and operated by large companies based outside the region (e.g., HAP, JL Group, Doyon/Aramark JV). This means that most of the local jobs offered are seasonal and lower-paying service industry positions. These types of positions are less likely to support long-term residency. Another factor to consider is the structure of the visitor industry in the Denali area. Most visitors are served by lodging and services owned by entities based outside the region. For example, while Grizzly Lodge is the largest locally owned hotel with 146 rooms, it is significantly smaller than the largest properties, which are owned mainly by park concessionaires or companies from outside the area. This ownership pattern may influence the types and availability of employment opportunities for the resident workforce.

- *Workforce Housing:* The shortage of both workforce housing and visitor accommodations presents distinct challenges for the region. While an increase in short-term accommodations helps meet visitor demand, it can reduce the availability of long-term rentals or residences for local workers. The Denali Borough has noted that this housing shortage has, at times, made it challenging to recruit and retain skilled employees, with some candidates declining job offers because of a lack of available housing. This issue is especially acute for small businesses, which often lack the resources to provide housing for seasonal employees or to hire as many workers as needed. As a result, the limited supply of workforce housing has become a significant barrier to expanding hospitality services and supporting economic growth for residents in the region.

- *Seasonal Infrastructure:* The extreme seasonality of the DAAPS visitor industry creates significant inefficiencies in infrastructure utilization. Most facilities are vacant or underutilized for 7 to 8 months of the year, while facing capacity constraints during peak summer months. This seasonal population swing creates unique infrastructure challenges, requiring systems sized for peak demand but sustainable during long off-seasons. Further investigation into the costs and potential returns of winterizing key facilities to support growth during the shoulder and winter seasons is needed, particularly considering the growing interest in aurora viewing and winter recreation. The park has reported increasing winter tourism; however, a limiting factor is the small number of hotels that remain open in the winter. For example, Denali Lakeview Inn and some smaller hotels around Healy operate year-round, but most accommodations close during the off-season. This limited winter lodging capacity may constrain further growth in winter visitation unless addressed.

- *Transportation Integration:* The current transportation options—limited air service, seasonal rail service, restricted park road access, and minimal local transit—create barriers for residents and visitors, as well as inefficiencies for operators. Current local transportation options for visitors are mainly available based on visitor purchases of tour packages, lodging, or recreation activities. Cruise and tour companies, as well as hotels, provide transportation to and from their facilities and to the public DNP attractions. While these services are invaluable for accessing DNP, they also serve to confine visitors to a particular array of lodging, dining, and activity options. This containment may also limit opportunities for residents and communities to benefit from the extraordinary economic opportunities brought by the summer influx of people through the area. Local operators who have attempted to offer transport-only services have found the economics of managing daytime demand patterns challenging. Transportation needs tend to be very high in the mornings and evenings when visitors are heading to and from the day's activities, with almost no demand during the day, as noted during a conversation with the Chamber of Commerce. Because of these factors, and the relatively small local population and lack of a centralized community hub for activities and attractions, the development of a local transit network that is more independent of large lodges and tour operators is likely to be slow to form and will require concerted local effort. Additional investigation into the costs and benefits of developing an integrated transportation system that connects aviation, rail, and road options, with particular attention to the "last mile" problem that many visitors face upon arrival in the region, would be critical to guide investment and produce realistic forecasts on the effects of expanded aviation service and/or a significant increase in visitor flow.

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Appendices

Appendix A: DAAPS Population Forecast

Appendix B: Denali Region Hospitality Industry

Appendix C: Hospitality Services Snapshot

Planning for the future, together

APPENDIX A: DAAPS POPULATION FORECAST

July 2025

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A.1 DAAPS Population Forecast Methodology

Borough and census area population projections published by the Alaska Department of Labor and Workforce Development (DOL&WD) for 2021 to 2050 were used as the initial basis for population estimates within the Denali Area Airport Planning Study (DAAPS) communities. The DOL&WD develops projections for the borough and census area and calculates regional projections in 5-year intervals using the cohort-component method, which considers mortality, fertility, and migration rates of recent time series data.

At the statewide level, DOL&WD provides low-, medium-, and high-population projections. The DOL&WD uses proportional fitting in the calculation of the borough and census area population estimates to eliminate discrepancies between the sum of the borough and census area projections and the statewide middle scenario projection. The Denali Borough forecast, which is a sum of smaller communities within the DAAPS region, closely matches the statewide middle scenario population projections developed by DOL&WD.

Population estimates for areas smaller than borough/census areas are based on DOL&WD community-level population data (2012 to 2024) and DOL&WD regional projections (2021 to 2050). These forecasts, as with the DOL&WD regional projections, do not consider future economic activities in the DAAPS communities.

A.1.1 University of Florida Method

A method used by the University of Florida Bureau of Economic and Business Research Florida Population Studies group (UF Method) was used to forecast population values for the small communities in the DAAPS region. The UF Method generates numerous estimates, removes the outliers, and averages the remaining individual estimates to generate a final forecast. For the DAAPS population forecast, four techniques were applied, each using three sets of base years, to create 12 initial population estimates. The four techniques are linear, exponential, share-of-growth, and shift-share, which are explained in the following subsections.

A.1.1.1 Linear

This assumes the population will change by the same number of people in each future year as the average annual change during the base period.

1. Calculate the average annual change in the number of people over the base period:

average annual change in number of people (AAC) = (Y2-Y1+Y3-Y2...+Yn+1-Yn)/n

Where:

Y = DOL&WD community population value for the base period Year 1 through Year n+1

n = Number of annual change values for the base period

2. Add the AAC value to the 2022 DOL&WD population value and to each subsequent year to generate the population values; population values that reach zero remain at zero for any future years:

$$\text{population value} = B + AAC*n$$

Where:

B = Base year population value, the 2022 DOL&WD population estimate

AAC = Average annual change in the number of people

n = Number of years past 2022

A.1.1.2 Exponential

This technique assumes the population will change at the same percentage rate in each future year as the average annual rate during the base period.

1. Calculate the average annual percentage change in population over the base period:

$$\text{average annual percent change (AAP)} = (Y2/Y1 + Y3/Y2 \ldots + Yn+1/Yn)/n$$

Where:

Y = DOL&WD community population value for the base period Year 1 through Year n+1

n = Number of annual percentage rates for the base period

2. Multiply the 2022 DOL&WD population value and to each subsequent year to generate the population values:

$$\text{population value} = B*AAP\text{^}n$$

Where:

B = Base year population value, the 2022 DOL&WD population estimate

AAP = Average Annual Percent change in the number of people

n = Number of years past 2022

A.1.1.3 Share-of-Growth

This assumes each community's share of regional population growth in the future will be the same as its share during the base period.

1. Calculate the communities' average share of the regional population growth over the base period:

$$\text{average share of growth (ASG)} = (Y1/R1 + Y2/R2 + \ldots Yn/Rn)/n$$

Where:

> Y = DOL&WD community population value for the base period Year 1 through Year n

> R = Relevant Regional Population value for the base period Year 1 through Year n

> n = Number of shares of growth values for the base period

2. Multiply the average share of growth value by each year's DOL&WD population value to generate the forecast population values:

$$\text{population forecast} = ASG*RP$$

Where:

> ASG = Average Share of Growth

> RP = Relevant Regional Population projected value for the year of interest (from DOL&WD)

A.1.1.4 Shift-Share

This technique assumes each community's share of the regional population will change by the same annual amount in the future as the average annual change during the base period.

1. Calculate the average annual share change over the base period:

average annual share change (AASC)= $(Y_2/R_2 - Y_1/R_1 + Y_3/R_3 - Y_2/R_2 ... + Y_{n+1}/R_{n+1} - Y_n/R_n)/n$

Where:

> Y = DOL&WD community population value for the base period Year 1 through Year n+1

> R = Relevant Regional Population value for the base period Year 1 through Year n+1

> n = Number of share rate of change values over the base period

2. Divide the 2022 DOL&WD population value for the community by the relevant DOL&WD regional population value to get an initial share-of-growth value (B/RB). Multiply the B/RB by the AASC value from Step 1, then multiply again by the number of years past 2022 to get the Shift-Share amount of change. Add the amount of change to the same initial B/RB for a projected community share of the regional population. Multiply the community share by the relevant DOL&WD projected regional population value for the year of the estimate:

$$\text{population forecast} = ((B/RB)*AASC*n)+(B/RB)*RP$$

Where:

        B = Base year population value (2022 DOL&WD)

        RB = Relevant Regional Base year population value (2022 DOL&WD)

        n = Number of years past 2022

        AASC = Average Annual Share Change

        RP = Relevant Regional Population projection value for the year of interest (from DOL&WD)

The UF method generated 12 estimates for each community (three base periods for each of the four techniques described above). The first set of base years in each technique was 2022 to 2024 to isolate changes in these years and, if values were uncharacteristic of the community, allow 2022 to 2024 values to be automatically dropped as outliers in a later step. The other two sets of base years were a 5-year and a 10-year period of 2019 to 2024 and 2014 to 2024, respectively.

Averages for each community were calculated after removing different numbers of high and low outliers from the estimates. On a community-by-community basis, equal numbers of high and low outliers were removed to create community averages for 2022 using all twelve, ten, eight, six, and four values, respectively. The five averages using the UF method were compared to the DOL&WD 2022 community-level and regional-level estimates. The average created using the elimination of the two highest and lowest values (using eight values) was chosen as the best fit and is reported for all years of community-level population estimates.

Planning for the future, together

Appendix B: Denali Region Hospitality Industry

July 2025

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B.1 Introduction

This report uses available datasets to provide insight into the status and trends of the visitor industry in the Denali region for the 2024–2025 Alaska Department of Transportation Denali Airport Planning Study. This study includes airports in the Denali Borough, as well as Minchumina in the Yukon–Koyukuk Census Area. This rural region has historically maintained very stable population numbers ([5]). Alaska Department of Labor and Workforce Development population forecasts anticipate a slow decrease in the resident population. For the Denali Borough, this is a population decline of 15% over the next two decades,1,625 to 1,374 residents, 2025–2045 ([4]).

Access to Denali National Park (DNP), scenic views, wildlife, and outdoor recreation draw visitors to the area. The local visitor industry is dynamic and arguably represents the majority of travelers through the region. The goal of this research is to create a roadmap of this visitor industry and offer insight into where it may be headed in the near future to inform decisions about airport improvement or development projects for the region.

B.2 Overall Alaska State Visitors

Overall, Alaska visitor volumes have shown a steadily increasing trend. The total Alaska visitor numbers currently continue to increase above pre-pandemic 74 ([29]). The Alaska Railroad and the Alaska Cruise Industry Association reported record high numbers for 2023, with railroad ridership at 540,329 and approximately 1.7 million cruise passengers ([11], [29]).

Figure B-1. *Alaska Total Visitor Volume Fall 2009– Spring 2024 (no Data For 2021-2022) ([29]).*
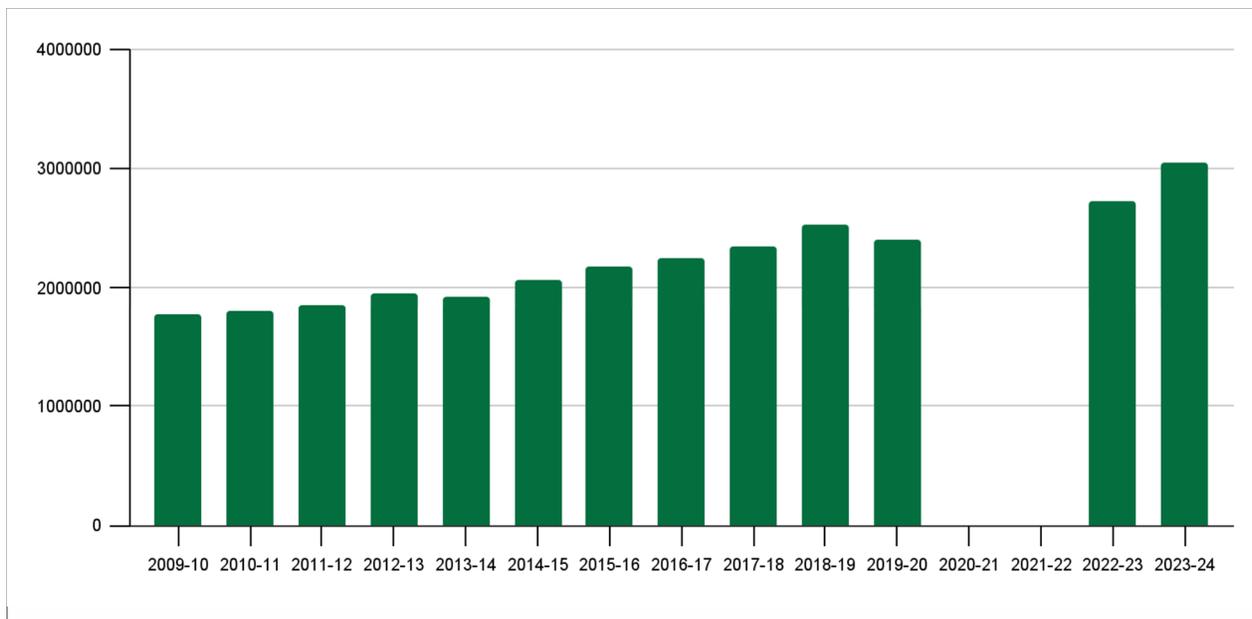
The Alaska Tourism Industry (ATIA) 2022–2023 Alaska Visitor Profile separated Alaska visitors into cruise passengers, guided group travelers, and independent travelers. Visitors were categorized as cruise passengers if they entered or exited the state on a cruise ship. Guided group travelers were those who reported entering with an organized tour. All other visitors were categorized as independent travelers. Statewide, the report found that cruise passengers made up 43% of all visitors, 6% were in guided groups, and 50% were independent travelers (27). Note that these values represent a period of time still seeing significant effects of the pandemic period. In 2018–2019, cruise passengers were estimated to make up the majority (55%) of Alaska visitors (28). In the most recent full season of data (summer 2023–spring 2024), cruise passengers were back to the majority of Alaska visitors at 56% (29).

Overall, Alaska visitors are mainly domestic, with international visitors making up about 5% of the total in the 2022–23 season (27). However, this likely represents a slower pandemic recovery for the international tourism market, and the number of international visitors may typically be closer to 10% of total Alaska visitors (39). Specific to the Denali area in 2011, a National Park Service survey found 16% of summer DNP visitors were international travelers (31).
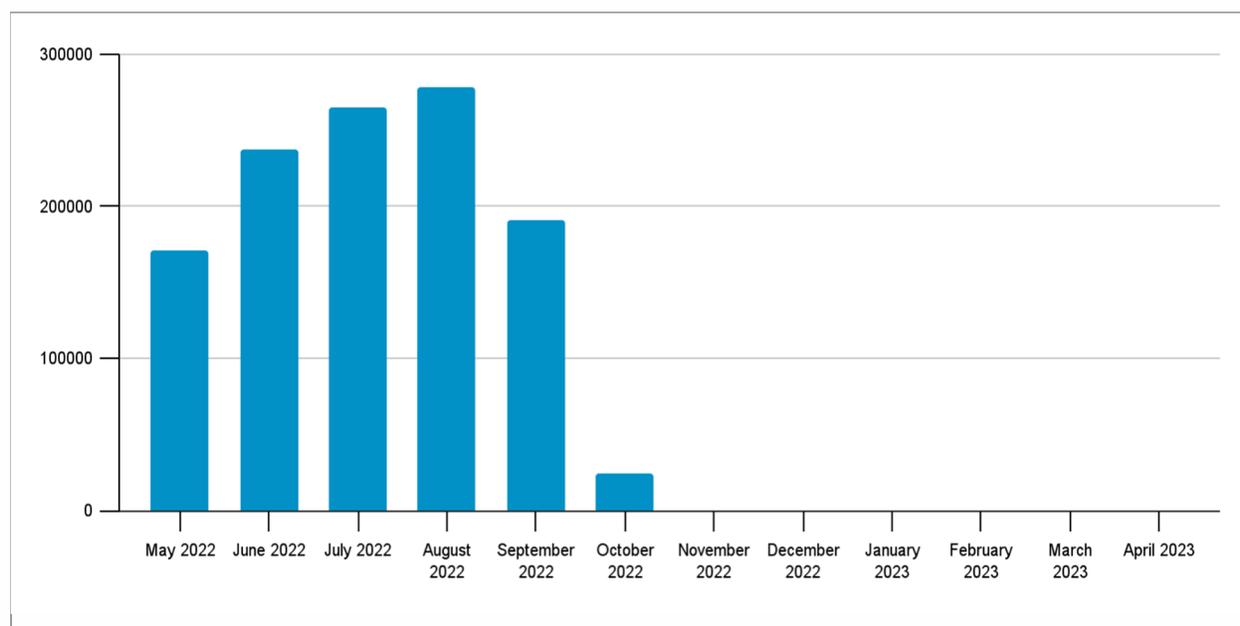
Figure B-2. 2022-2023 Percent of Total Alaska Total Visitors by Visitor Type (27).
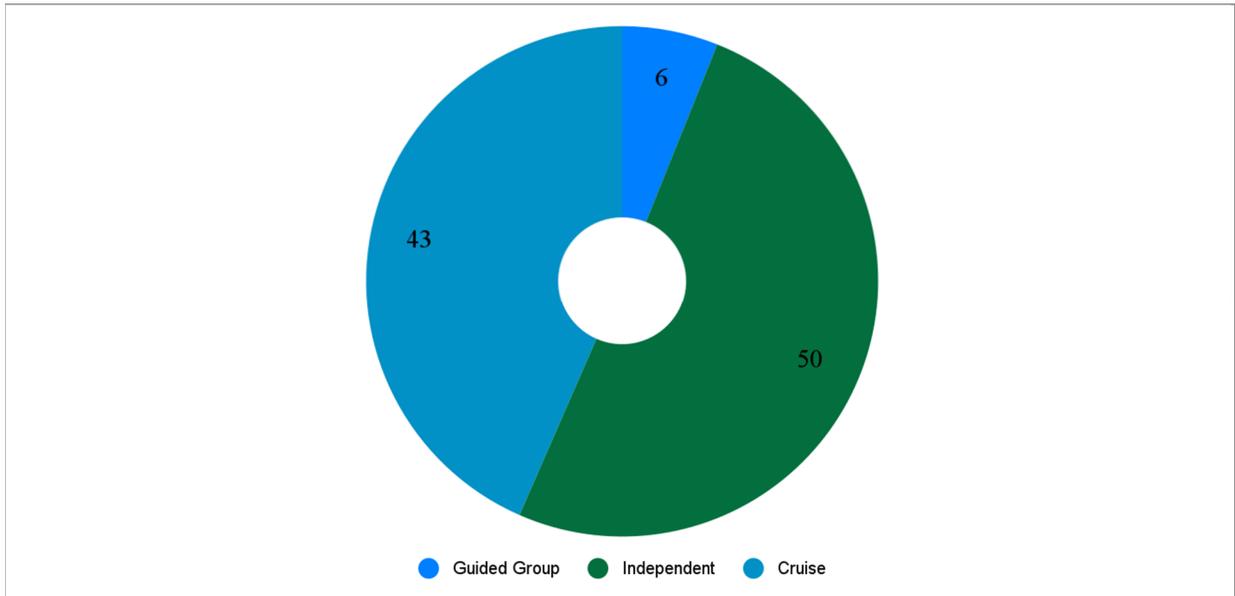
Overall winter visitation in Alaska has been steadily increasing. Cruises sailing to Alaska, historically limited to May to September, now stretch into April and October. However, visitation and tourism in Alaska are still very much concentrated in the summer season.

The growth of the Alaska visitor industry is supported by state investment in the Alaska Tourism Industry Association (ATIA). ATIA uses the funds to promote Alaska as a tourism destination. This marketing presence has been shown to have a strong impact on tourism figures, and the growth trends illustrated are, to some degree, linked to continued state support for those efforts.
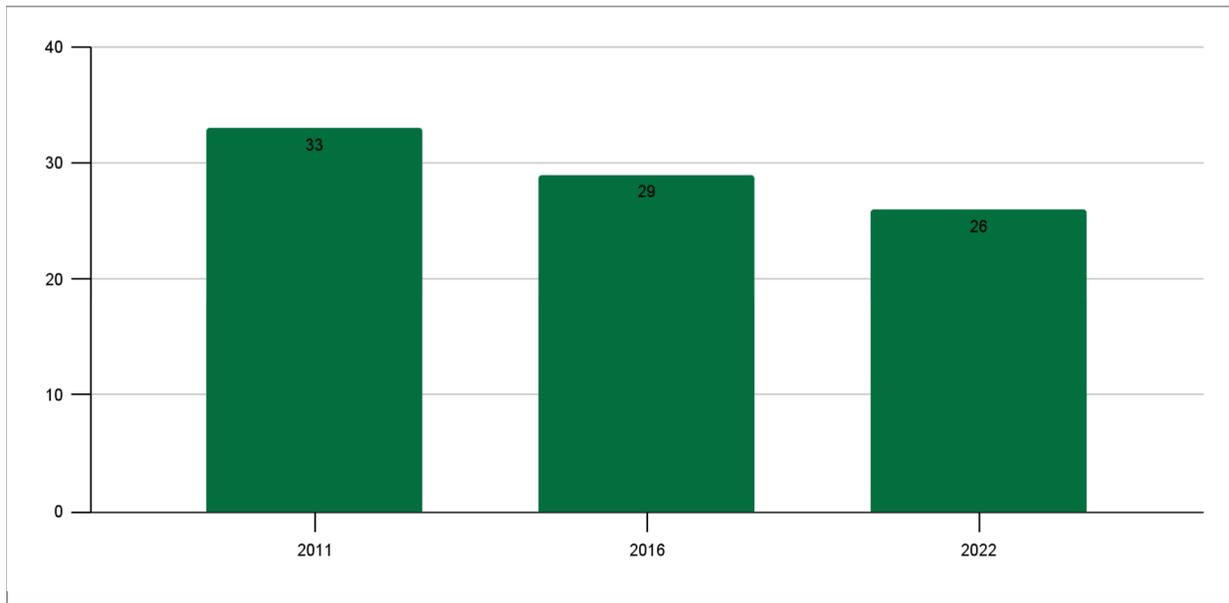
B.3 Denali Region Visitor Numbers

In the summer of 2022 through the winter of 2023, 20% of all Alaska visitors traveled to the Denali area. This equates to approximately 544,836 of all 2,724,180 visitors to Alaska ([27](#)).

Of all visitors to Alaska, it appears that the Interior region as a whole has been receiving a slowly declining share of visitors ([27](#), [29](#)). However, the most recent data for this trend is likely influenced by lingering pandemic impacts. In particular, the number of international visitors to Alaska appeared to be still recovering in 2022. International visitors made up about 5% of the total visitors to Alaska in the 2022–2023 season, the only year where specific data are available ([27](#)).

Cruise passengers access Denali and Interior Alaska mainly from the ports of Seward or Whittier. These ports received just a small portion of overall Alaska cruise passengers (18% and 15% respectively in 2019), which, in part, accounts for the smaller percentage who make it to the Denali region ([8](#)).

Figure B-4. *Percent of Total Summer Visitors Traveling to the Interior Region by Year ([26](#), [29](#)).*

Figure B-5. *Alaska Summer Visitors Traveling to the Interior—Total Visitors, Cruise Passengers by Year ([27](#), [28](#)).*
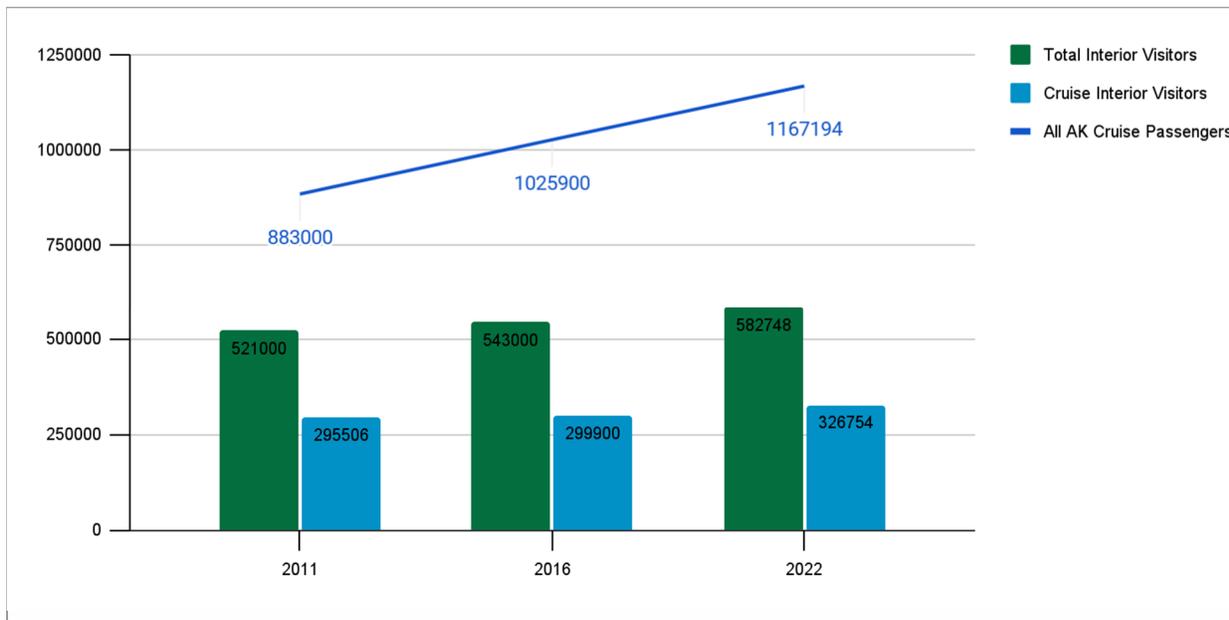

B.4 Denali Region Seasonality

The Denali region visitor industry is intensely seasonal. Even in Alaska, where the seasonal nature of work is a given, the Denali Borough stands out for the contrast between its winter and summer employment numbers. As shown in Figure B-6, the Denali Borough's seasonal unemployment shows a sharp annual fluctuation pattern,

which contrasts strongly with the clear but much gentler seasonal unemployment rate in Alaska (7). International summer work travel students (Cultural Exchange Visitor Visa [J-1 visa]) may have made up as much as 32% of the Denali area leisure and hospitality seasonal workforce in 2024, with 674 visas (38) and a May–September average of 2,138 leisure and hospitality jobs (2). For 2025, the projected population of the Denali Borough is 1,625 residents (4). An National Park Service (NPS) planning document estimated that in 2010 the effective peak season population of the region was 13,500 individuals when both visitors and seasonal workers were accounted for (34), since then both visitor and worker numbers have increased.

Figure B-6. *Monthly Unemployment Rates, Alaska compared to the Denali Borough (January 2013–June 2024) (7).*
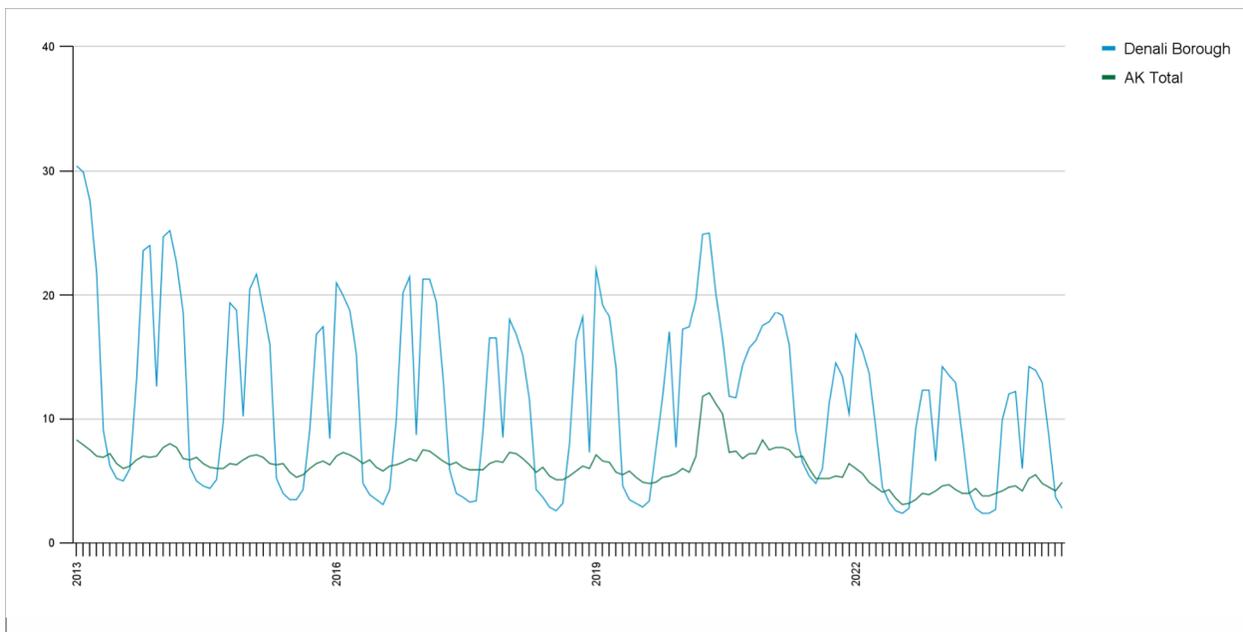

The summertime employment numbers in the Denali Borough typically reach numbers over two times as high as the local population. In 2019, the average monthly employment number for all industries from May to October was 3,230, and in 2023, the same months averaged 2,972 jobs (1, 2). The total wages for the Denali Borough Leisure and Hospitality jobs category were $40,219,880.00 in 2019 and $47,242,202 in 2023 (1, 2). The influx and outflow of seasonal workers bracket the peak visitor periods for the region.

Around 98% of the Denali Borough accommodations taxed nights occur between April and September (30). Many of the accommodations, as well as other businesses such as tour operators, gift shops, and restaurants, operate solely during the busy summer season.

Figure B-7. *Denali Borough Monthly Employment Numbers as Percentage of the Total Borough Population ([1]).*
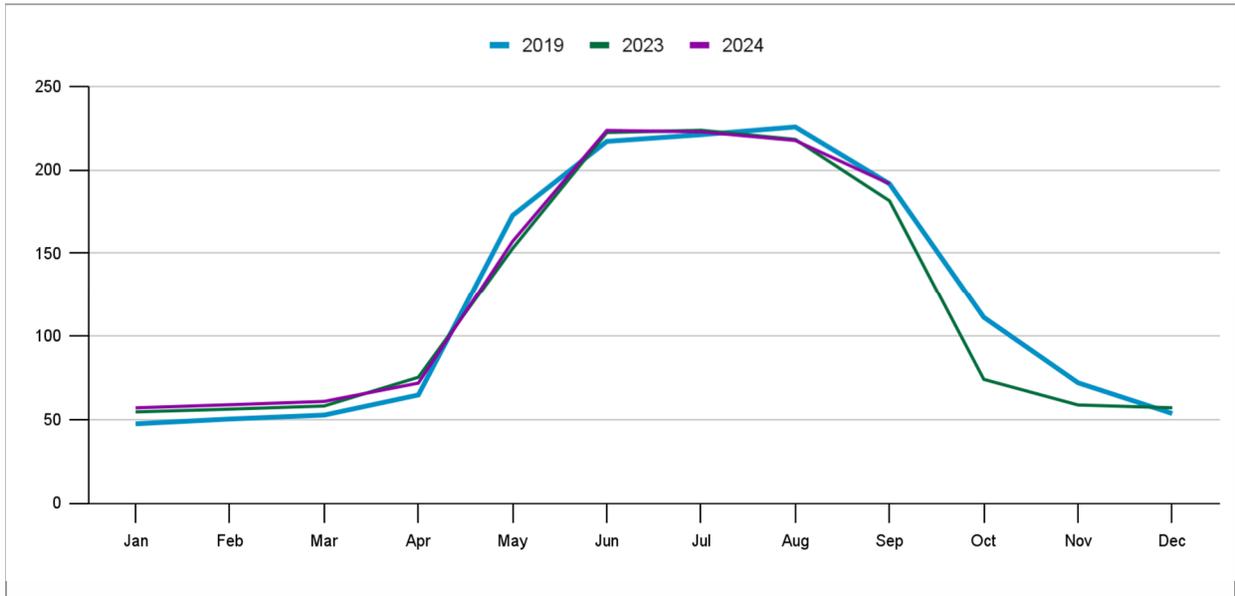
Figure B-8. *Percent of Denali Borough Accommodations Tax Income by Quarter for 2022 ([30]).*
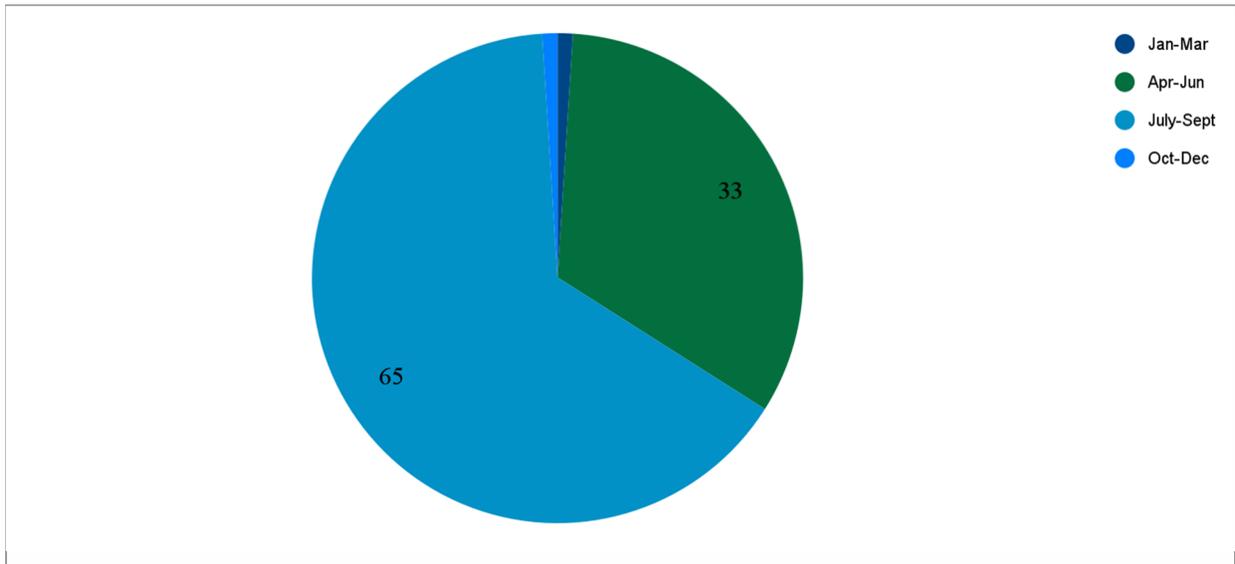
The DNP maintains full operations through the summer season, beginning mid–May through mid–September, with very limited access and services the rest of the year. As in the rest of Alaska, winter visitors to the Denali area have been increasing. The DNP saw an approximately 300% increase in winter visitors to 17,296 visitors (equivalent to about 3% of the summer visitors for 2018) from fall of 2012 to spring of 2019 ([35], [36]). It appears that this trend is continuing. From the fall of 2019 to the fall of 2024, the winter

visitor numbers increased another approximately 200% to 35,238 (equivalent to about 8% of the summer visitors for 2024) ([35](#)). Although these winter visitors represent a significant change, they still represent only a very small portion of the overall visitors.

Figure B-9. Denali National Park 2023-2024 Visitation by Month ([34](#)).
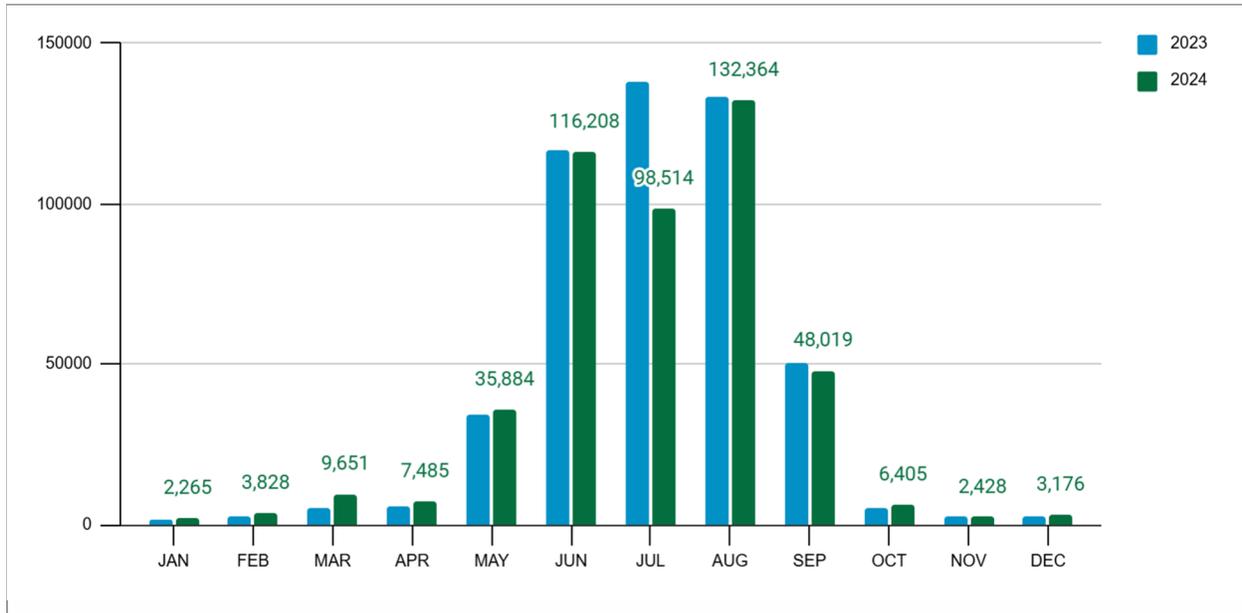
## B.5 General Character and Flow of Visitors Through the Denali Region

The general understanding of visitor activity in the Denali area is that it is dominated by cruise passengers (personal communications; Denali Borough Planning Department, Denali Chamber of Commerce). Holland America Princess (HAP) owns and operates two hotels in the area and brings in guests via bus and train. Premier Alaska Tours handles a large portion of other group travel, including cruise passengers from other cruise lines (i.e., Norwegian, RCI, Disney) by bus and train car. The local hotels owned by the JL Group (three hotels) and Aramark (Denali Park Village) are largely filled by Premier Alaska Tours guests ([41](#)).

According to the ATIA 2022-2023 Visitor Profile report, the Denali region received more independent travelers that year than cruise passengers. Visitors were categorized as cruise passengers if they entered or exited the state on a cruise ship, and guided group travelers were those who reported entering with an organized tour. All other visitors were categorized as independent travelers. The Denali region was found to have received 38% of all guided group travel to Alaska, 25% of all independent travelers, and 12% of all cruise passengers. Guided groups were very strongly represented in the Denali area; however, they make up only 6% of the total visitors to Alaska ([27](#)). As noted in the discussion of Figure B-2, these data are likely influenced

by lingering impacts of the COVID-19 pandemic. While a trend toward more independent travelers in the Denali region is suggested, data farther out from the pandemic years would provide more compelling support. Although Denali-region specific data are not available, the most recent overall Alaska state numbers indicate that cruise passengers have returned to dominating the visitor numbers, making up 43% in the 2022-2023 season and 56% in the 2023-24 season, which is more consistent with pre-pandemic numbers ([27](#), [28](#), [29](#)).

Figure B-10. 2022-2023 Percent of Denali Visitors by Type ([27](#)).
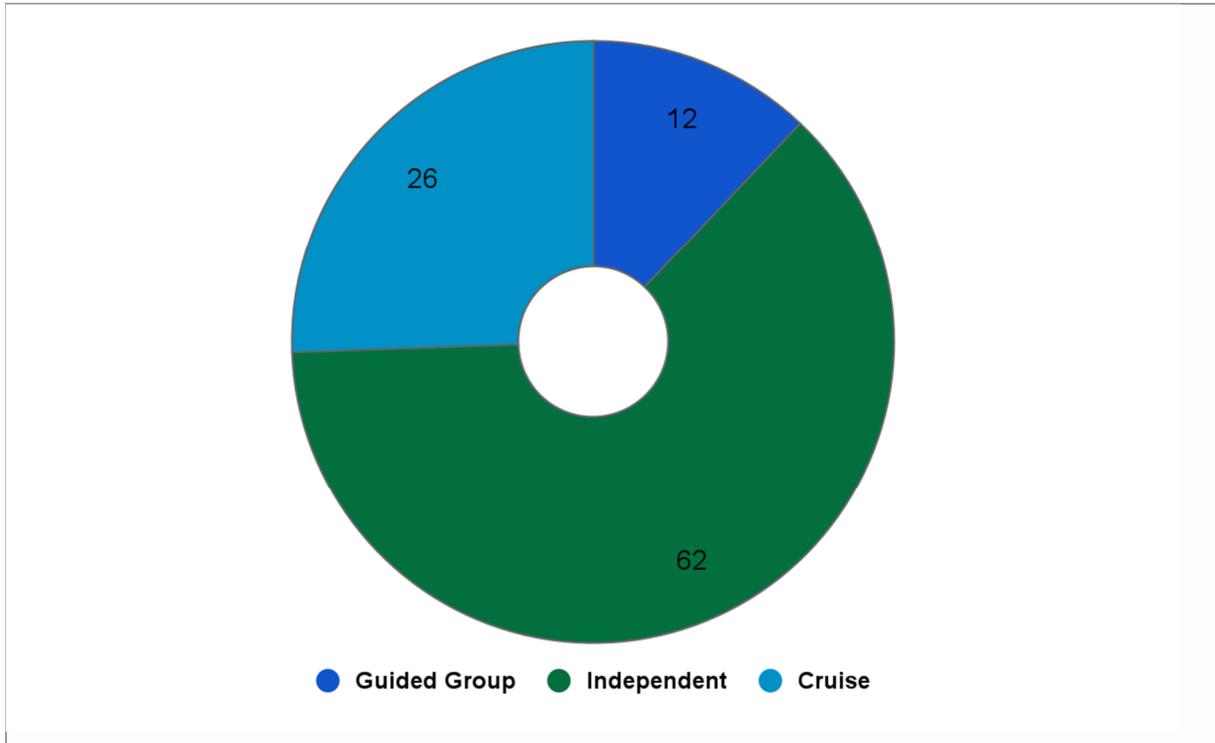
These values are estimated based on the Interior Region receiving 609,320 visitors (20% of 3,046,600 total Alaska Visitors) and 38% of all Alaska Guided Groups, 25% of all Alaska Independent Travelers, 12% of all Cruise Passengers.

Independent and smaller guided group travelers mainly arrive in the Denali area by passenger vehicle or train. Cruise line passengers arrive and depart mainly by bus/motorcoach and rail.

B.5.1 Transportation Modes for Arrivals and Departures From the Denali Area

A large portion of visitors to DNP arrive in the Denali area via the Alaska Railroad. Passengers travel to DNP on the Denali Star line that runs between Anchorage and Fairbanks, as well as on contracted rail cars (mainly transporting cruise passengers). Like the Alaska cruise industry, the Alaska Railroad also had a record number of

passengers in 2023. The Denali Star line had 16,366 more riders in 2023 as compared to 2019 ([11](#), [14](#), [16](#)). In 2023 the Denali Star line plus contracted rail cars on that route accounted for 48% of total Alaska Railroad Ridership (39% in 2024)([11,14,26](#)).

Visitors to the Denali area may arrive and depart via different transportation modes, and more people tend to depart from Denali via railroad than arrive. When the larger Alaska Railroad departure passenger numbers are compared against total DNP visitor numbers, they indicate that around 44% or more visitors rode the train for at least one leg of travel to or from DNP in 2023 (32% over the 10-year period from 2014–2023) ([26,32](#)).

Figure B-11. Alaska Railroad Denali Depot Total Arrivals and Departures and Total DNP Visitors ([26,32](#)).
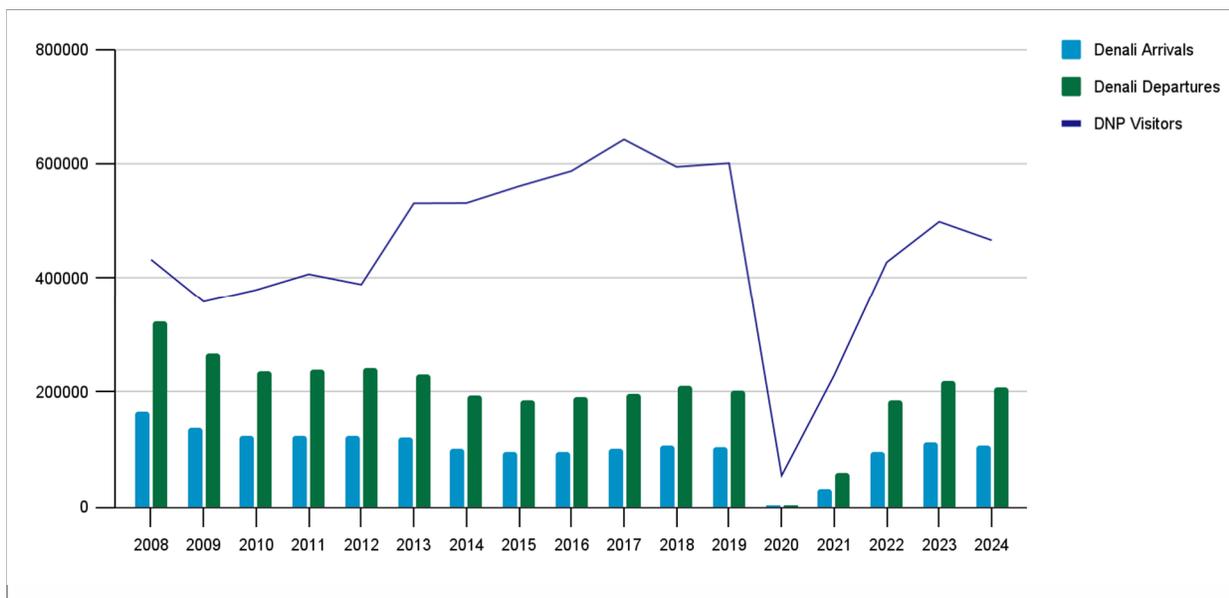

In contrast to rail departures, arrivals at the Denali Depot account for only around 23% of visitors to DNP ([26](#), [37](#)). Private passenger vehicles account for around 1% of visitor arrivals ([37](#)). Around 5% of visitors arrived in DNP via air travel in 2024 (24,204 visitors, only those who actually land within DNP are counted), most of these appear to originate from outside the Denali Area Airport Planning Study (referred to as DAAPS or the Denali area), such as flightseeing and mountaineering flights from Talkeetna (DOWL Aviation DAAPS Forecast Draft, [37](#)). The balance of visitors is accounted for mainly by the many motorcoach/bus services operated by a variety of tour companies that are a constant summer presence in the area. These numbers would indicate that somewhere around 71% of visitors arrive via motorcoach/bus and, assuming private vehicles and air travel remain constant, around 50% of visitors are likely to depart the Denali area via motorcoach/bus. The discrepancy between train arrivals and departures is likely in part because of the fact that many visitors are cruise passengers whose travel to the Denali area originates from Anchorage, with

their departure from Alaska via Fairbanks. Travel by train between Denali and Fairbanks is about one-half as costly in terms of both time and ticket price as travel by train between Denali and Anchorage.

Figure B-12. Denali National Park Visitor Arrivals by Railroad, Private Passenger Vehicle, and Total Visitors by Year ([37]).
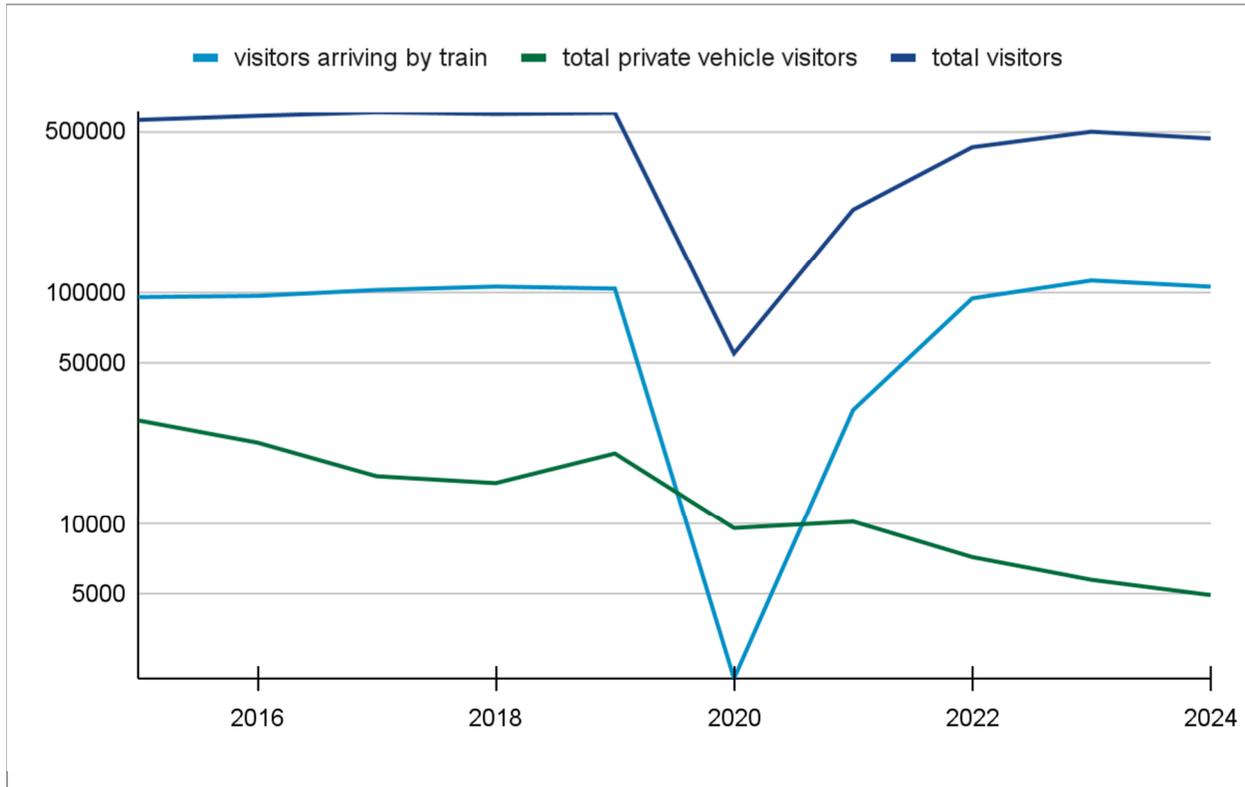
The Alaska Department of Transportation traffic counter, located at Milepost 245 in the Denali Borough, reflects a gradually increasing number of vehicles. As of 2023, the average annual daily traffic count did not yet match the pre-pandemic vehicle numbers. However, the August 2023 monthly average daily traffic (MADT) count was greater than the same month in 2019. In 2024, the March–September MADT was greater than in 2019, and the early months of 2025 continue to see increasing traffic counts ([9]).

In 2023, DNP visitor numbers were still about 100,000 visitations lower than in 2019 and over 1 million visitors less than the 2011–2019 10-year average total visitation number ([32]). From roughly October to May, winter weather and temperatures force the closure of the main visitor center and the Denali Park Road. Services and attractions are much reduced and the smaller Murie Science and Learning Center acts as a winter visitor center.

On August 24, 2021, Denali Park Road was closed at Milepost 43, and has remained closed through the summer of 2024, because of the Pretty Rocks Landslide. This has substantially limited visitor access to the park and to attractions such as Wonder Lake,

which may account for some of the lack of recovery. In 2024, the DNP was closed for the Riley Fire for 10 days beginning July 1, and some areas remained closed until July 15, 2024 ([40]). Because this closure occurred during the peak visitor season, the impact will likely show in the 2024 visitor numbers. For a comparison, Glacier Bay National Park shows a visitor increase of 31,572 in 2023 over 2019 (703,659 in 2023 versus 672,087 persons in 2019) ([33]).

Figure B-13. *Alaska Department of Transportation Monthly Average Daily Traffic Count for Milepost 245 ([9]).*
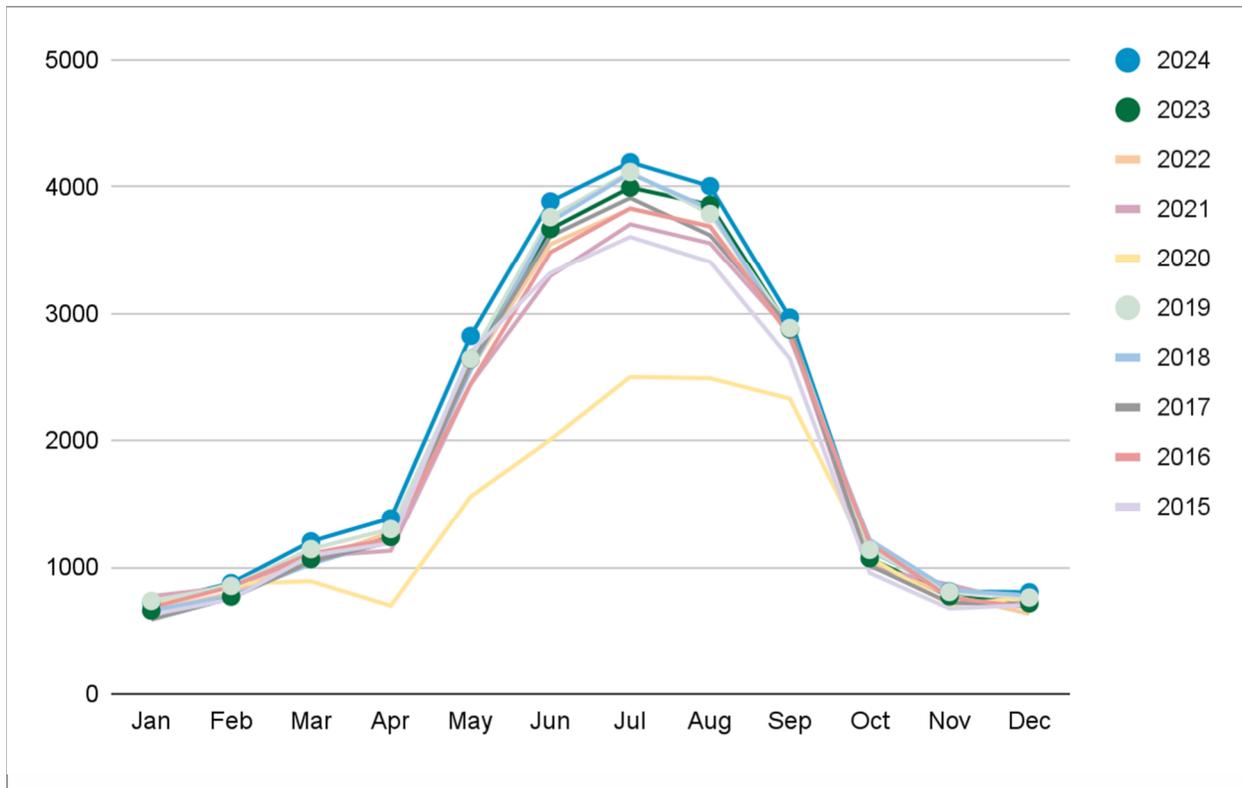
Yet another consideration when comparing the visitation numbers is the way that the DNP counts visitors. There is no fixed gate or location where every visitor in a vehicle is counted; rather, visitors access the park in various ways. Therefore, the DNP reports visits rather than visitors. An individual visitor tends to enter the park several times and, thus, accounts for multiple visits ([31]). It is possible that the lower recent visit number could be accounted for by more casual visitors at the north entrance (Denali Borough) not being counted and/or making fewer visits caused by not choosing to ride the bus because of the limits imposed by the Pretty Rocks Landslide.

Also of note are the DNP visitor and vehicle limitations of operations and services. The NPS carefully manages both the number of backcountry visitors and the major area attraction, bus tours into the park. Vehicle numbers down Denali Park Road are

regulated by both daily and annual limits. This allows the park to maintain the wilderness character and opportunities for wildlife viewing, which are a major draw.

Current vehicle numbers are close to capacity, which may limit the ability to accommodate a much greater number of visitors on these popular tours, particularly at the peak season in early July (NPS personal communication, January 2025, 34).

*Figure B-14. Denali National Park Total Visitors by Year (32).*
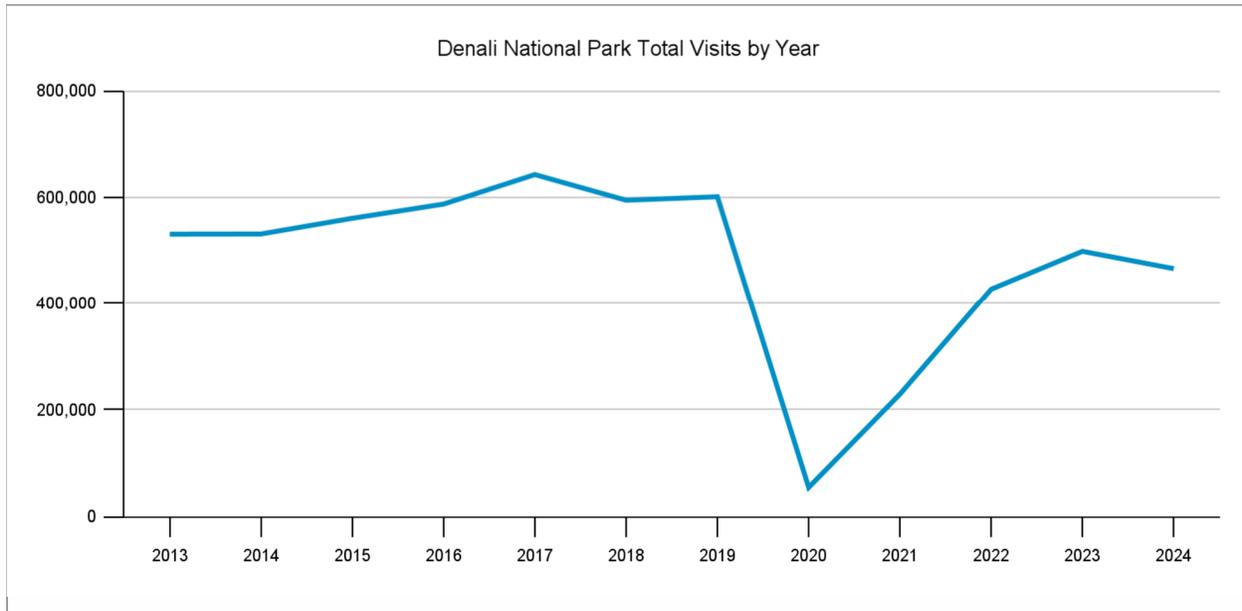
Denali Borough's total accommodations nights in 2023 were up around 100 overnight stays from 2019 (30). This increase in nights is mostly accounted for by Tent and RV stays (likely representing independent travelers). This is another indication that visitor composition may be shifting to an increasing portion of independent travelers. A greater portion of independent travelers who may have greater flexibility to visit other attractions in the region (as an alternative because of the DNP road closure) might also contribute to the still lower than 2019 park visit numbers.

The Denali area attractions, activities, lodging, and dining options are widely distributed across multiple communities and several miles. Local transportation options are limited to a handful of rental vehicles and one local taxi/shuttle service. Visitors tend to depend on tour and activities operators for transportation, and the larger accommodations options tend to provide in-house dining. Local housing options are limited and can pose a challenge in recruiting employees to the area. New housing construction is often owner-built (not tracked by state systems), and a significant portion of it has been part of the conversion to a short-term rental market.

Figure B-15. Denali Borough Total Accommodation Nights by Year ([30]).
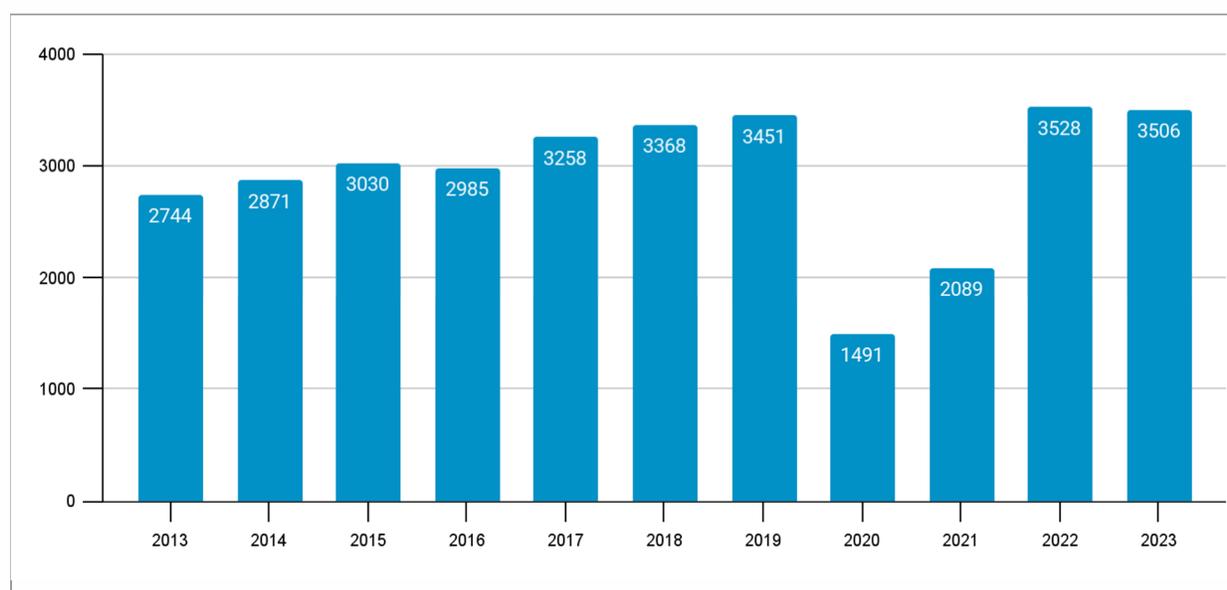
B.6 Relevance to Airport Development Questions

The visitor/tourism industry in Alaska and the Denali region is growing. The Alaska Railroad has a new cruise ship terminal in development within Seward to accommodate the anticipated continued growth (slated for completion in 2026). More visitors are coming and, although still concentrated in the summer, numbers are increasingly spread throughout the year. Currently, cruise passengers visiting Denali are most likely to be booked on cruise line-owned or affiliated motorcoach or railcar. To exit the state, a significant portion of cruise passengers continue north to Fairbanks or return to Anchorage to fly. If another, more affordable and regular option to flying out of Denali was available, this could potentially be an attractive option to a portion of these travelers. Anchorage operators of small aircraft (e.g., Beaver, Otter) typically only offer custom charter service to the Denali region because of low demand and, in part, increased logistics because the region is right on the edge of flight distance that does not require refueling (communication with Rust's Air Service).

Overall, visitors to Alaska may be choosing shorter trips. Vanessa Jusczak of the Denali Chamber of Commerce reported this as a common current perception on tourism industry discussion forums. ATIA's 2022–2023 report seems to indicate that the average length of visitor stay in Alaska is decreasing, going from 9.2 days in 2016 to 8.5 days in 2022 ([27]). For visitors with a short duration itinerary, travel to the Denali region is relatively costly in time compared to the ability to visit several locations and attractions closer to Anchorage. Improvement in air infrastructure could support more efficient visitor travel to and from the region. During the peak season, most workers

come from outside the region. For them, as well as independent travelers and other visitors, the efficiency of more regular and more affordable air transport might be highly attractive.

Table B-1. Travel Time Between Denali, Anchorage, and Fairbanks Aboard the Denali Star Train ([10])

Denali Star Train		
Route	Travel Time	Highway Miles
Anchorage to Wasilla	1 hour, 15 minutes	44
Wasilla to Talkeetna	1 hour, 30 minutes	70
Talkeetna to Denali	4 hours, 20 minutes	146
Denali to Fairbanks	4 hours	128

A significant issue for visitors who might arrive by air to the Denali region is a lack of local transportation options. Activities, attractions, food, and lodging are widely distributed, and visitors who do not have their own vehicle or are not part of an organized operation with tour shuttles may struggle to get between locations and activities.

Greater visitor use of air travel to and from the Denali region has the potential to negatively impact Fairbanks visitor numbers. Other communities along the road where motorcoaches make regular stops, such as Nenana, might also see a negative impact.

B.7 Summary and Conclusions

Alaska visitor numbers have shown a steady increase (pandemic years excepted) over the last decade, and 2023 saw both record cruise passenger and railroad ridership numbers. Visitor numbers to the Denali region also show a similar steady increase; however, there are indications that the region is receiving a decreasing share of the overall Alaska visitors. There are also indications that the post-pandemic recovery of visitor numbers for Denali Park has been more sluggish than similar national parks. This is indicated by May–October employment numbers, traffic counts, and DNP visits. Visitor composition seems to be shifting, with some increase in independent travelers (and possibly increased guided group tour visitors), as supported by Denali Borough and AKRR numbers. The partial closure of Denali Park Road, a major attraction, may account for a portion of the slower post-pandemic recovery.

The Denali region is rural, with significant travel time from both Anchorage and Fairbanks and sprawling visitor attractions, lodging, and services. The resident population is several times smaller than the summer influx of visitors and hospitality

workers, with around 1,625 residents in 2025 compared to an estimated greater than 13,500 peak season population (4,34). The small resident population means that basic services, such as electricity, sewage, and water, are significant considerations for visitor infrastructure expansion and borough services and emergency planning. For example, the Riley Fire in the summer of 2024 resulted in a shutdown of electricity for thousands of visitors housed in the Nenana Canyon area. Travel time to Denali from Anchorage or Fairbanks is significant, and visitor attractions and lodging are widely distributed. These factors as well as the limits and challenges around NPS vehicle and visitor restrictions, local transportation options, residential and seasonal housing, and dining and lodging options (particularly in winter), present some economic and logistical barriers to local visitor industry growth. In addition, international visitors and J-1 visa seasonal workers contribute substantially to the region, creating a level of vulnerability to changes in government policy that impact the ease and attractiveness of international travel to the United States.

Based on these factors and findings, we expect the Denali region visitor industry to continue a pattern of growth; however, the growth may be slower than for the visitor industry statewide. This may make the Denali region visitor industry more vulnerable to stagnation or decreased numbers in events influencing overall Alaska visitor numbers, such as a potential loss of state funding for tourism promotion or a significant reduction in the number of international visitors.

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Planning for the future, together

APPENDIX C: HOSPITALITY SERVICES SNAPSHOT

July 2025

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Table of Contents

C.1 Introduction: Tourism Infrastructure Snapshot in Denali Area

This inventory reflects accommodations and operators active across the full Denali Borough, including but not limited to the communities of Healy, Cantwell, and those adjacent to Denali National Park and Preserve. Data include borough-wide active listings and permitted commercial operations under National Park Service (NPS) jurisdiction.

C.1.1 Lodging

Table C-1. Market Snapshot

Lodging Type	Units	Peak Guest Capacity	Seasonal Notes	Lodging Type
Hotels/Large Lodges	1,480	3,108	88% Seasonal (May–September)	Hotels/Large Lodges
NPS Campgrounds	241	603	Wonder Lake Closed 2025	NPS Campgrounds
Private RV Parks	259	648	100% Seasonal Operation	Private RV Parks
State Park Campgrounds	118	295	Limited Winter Access	State Park Campgrounds
Vacation Rentals/B&Bs	275	750	21% Year-Round Availability	Vacation Rentals/B&Bs
Total Denali Borough	2,373	5,404	Highly Seasonal Concentration	Total Denali Borough

Table C-2. Hotels and Inns

Property	Community (MP)	Units	Typical Season	Notable Amenities
Denali Princess Wilderness Lodge	McKinley Park (238.5)	663 rooms	May—September	Multiple restaurants, riverside deck, tours
Denali Bluffs Hotel	McKinley Park (238.6)	176 rooms	May—September	River-view wing, shuttle service
Grande Denali Lodge	McKinley Park (240)	166 rooms and 6 cabins	May—September	Hilltop views, restaurant, meeting space
Denali Park Village Lodge	Nenana River (231)	188 lodge rooms and 52 cabins	May—September	20-acre campus, dinner theater
Denali Cabins	Parks Hwy (229)	46 cedar cabins	May—September	On-site pub, hot tubs, shuttle
Denali Rainbow Village Motel	Denali Park (238.6)	20 rooms and cabins	May—September	Boardwalk retail, RV park
Denali Park Hotel	Healy (249.5)	48 rooms	Year-round	Rail-car lobby, pet-friendly
Aurora Denali Lodge	Healy (249.5)	28 rooms	Year-round	Hot breakfast, game room
Denali Totem Inn	Healy (248.7)	54 rooms	Year-round	Fitness center, sauna, pool, restaurant
Denali RV Park & Motel	Healy (251)	13 rooms	May—September	89 RV pads, shuttle to park
Denali Lakeview Inn	Otto Lake (247)	21 suites	Year-round	Lakefront decks, kayaks, bikes
McKinley Creekside Cabins & Café	Carlo Creek (224)	48 units	May—September	Café, firepit
Backwoods Lodge	Cantwell (210.5)	12 units	Year-round	Kitchens, Denali Highway access
BluesBerry Inn	Cantwell (210.8)	11 rooms	May—September	Budget motel, blueberry picking

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Table C- 3. Backcountry Lodges

Property	Units	Access Mode (2025–26)
Kantishna Roadhouse	32 cabins	Fly-in only
Denali Backcountry Lodge	42 cabins	Fly-in only
Camp Denali	19 cabins	Fly-in only
Skyline Lodge	5 rooms	Fly-in only

Table C-4. National Park Service Campgrounds

Campground	Sites	Tent Only or RV	Vehicle Length Limit	Season	Managing Entity
Riley Creek (Mile 0.4)	142	RV and Tent	Up to 40 feet	Year-round (water mid-May—mid-September)	NPS
Savage River (Mile 13)	32	RV and Tent	40 feet	May 20—mid-September	NPS
Sanctuary River (Mile 23)	7	Tent Only	—	May 20—mid-September	NPS
Teklanika River (Mile 29)	53	RV and Tent	40 feet	May 20—mid-September	NPS
Igloo Creek (Mile 35)	7	Tent Only	—	May 20—mid-September	NPS
Wonder Lake (Mile 85)	28	Tent Only	—	Closed in 2025 (Pretty Rocks slide)	NPS
Riley Creek (Mile 0.4)	142	RV and Tent	Up to 40 feet	Year-round (water mid-May—mid-September)	NPS

Table C-5. Private Campgrounds

Campground	Sites	Tent Only or RV	Vehicle Length Limit	Season	Managing Entity
Denali Grizzly Bear Resort (Carlo Creek)	72 (RV and Tent)	RV and Tent	38 feet	May—September	Private
Denali RV Park (Healy)	89 RV pads	RV Only	45 feet	May—September	Private

C.1.2.1 Key Notes
- All NPS campgrounds except Sanctuary River, Igloo Creek, and Wonder Lake accommodate both tents and RVs
- Tent-only sites are concentrated at Sanctuary River, Igloo Creek, and Wonder Lake.
- Private campgrounds offer both RV and tent options, but Denali RV Park is exclusively for RVs.

C.1.3 Sources
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C.1.4 Airbnb Market Snapshot
Denali Borough's short-term rental (STR) market is highly seasonal, with most listings concentrated in Healy, Cantwell, and near the Denali National Park entrance. The region's STR supply consists mainly of cabins, yurts, and small homes, catering to summer tourists and a small but growing winter audience.

Table C-6. Denali Area Short-Term Rental Comparison

Location	Number Listed	Average Daily Rates (ADR)	Peak	Occupancy
DNP – Entrance/Adjacent	20	$349	June—August	50%
Healy	96	$208	July—August	54%
Cantwell	31	$177	June—August	53%

C.1.4.1 Key Takeaways
- **Seasonality:** All three markets are highly seasonal, with peak occupancy and revenue in summer and sharp declines in winter.
- **Market Size:** Healy is the largest STR market in Denali Borough, followed by Cantwell and the park core.
- **Booking Patterns:** Short minimum stays (1–2 nights) dominate, especially in Healy and Cantwell.
- **Guest Profile:** Over 90% of guests are domestic, mostly from Anchorage and Fairbanks, with a strong Gen Z/Alpha presence.

C.1.4.2 Denali National Park and Preserve STR

C.1.4.2.1 Market Snapshot
- **Active Airbnb Listings:** 20
- **Listing Type:** 95% entire home/apartment; 55% houses
- **Typical Capacity:** Average 5.2 guests/listing; most accommodate 5 guests
- **Bedroom Mix:** 1- and 2-bedroom units are 60% of the market

C.1.4.2.2 Seasonality
- **Peak (June–Aug):** $10,404/month, 76.3% occupancy, $359 ADR
- **Shoulder:** $5,451/month, 50.1% occupancy, $368 ADR
- **Low (Jan, Feb, Nov):** $3,023/month, 33.9% occupancy, $374 ADR
- **Absolute Peak Month:** $11,015, 82.1% occupancy, $417 ADR
- **Lowest Month:** $2,519, 28.4% occupancy, $325 ADR

C.1.4.2.3 Guest Profile
- **Domestic:** 95.5% (mainly from Fairbanks/Anchorage)
- **Demographics:** 50% 20s–30s; 70.9% English-speaking

C.1.4.3 Healy STR Market

C.1.4.3.1 Market Snapshot
- **Active Airbnb Listings:** 96
- **Listing Type:** 80% entire home/apartment, 56% outdoor/unique, 21% houses
- **Average Capacity:** 4.1 guests/listing

C.1.4.3.2 Seasonality
- **Peak (June–Aug):** $10,404/month, 76.3% occupancy, $359 ADR
- **Shoulder:** $5,451/month, 50.1% occupancy, $368 ADR
- **Low (Jan, Feb, Nov):** $3,023/month, 33.9% occupancy, $374 ADR
- **Absolute Peak Month:** $11,015, 82.1% occupancy, $417 ADR
- **Lowest Month:** $2,519, 28.4% occupancy, $325 ADR

C.1.4.3.3 Guest Profile
- **Domestic:** 95.5% (mainly from Fairbanks/Anchorage)
- **Demographics:** 50% 20s–30s; 70.9% English-speaking

C.1.4.4 Cantwell STR Market

C.1.4.4.1 Market Snapshot
- **Active Airbnb Listings:** 31
- **Listing Type:** 94% entire home/apartment, 68% outdoor/unique, 19% houses
- **Average Capacity:** 3.8 guests/listing

C.1.4.4.2 Seasonality
- **Peak (June–Aug):** $5,344/month, 66% occupancy, $276 ADR
- **Shoulder:** $3,165/month, 49.3% occupancy, $271 ADR

- **Low (Jan, Nov, Dec):** $1,435/month, 36.3% occupancy, $250 ADR
- **Absolute Peak Month:** $5,845, 70.9% occupancy, $299 ADR
- **Lowest Month:** $1,251, 33.3% occupancy, $249 ADR

C.1.4.4.3 Guest Profile
- **Domestic:** 93.4% (mainly Anchorage)
- **Demographics:** 50% Gen Z/Alpha; 66.1% English-speaking

C.1.5 Sources
(1) **Denali National Park & Preserve Airbnb Data 2025:** AirROI Market Report
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C.2 Tour Operators

There are approximately 80 companies authorized to provide commercial visitor services within Denali National Park and Preserve, according to the NPS. These services operate under a variety of agreements, including Concession Contracts, Permitted Services, and Commercial Use Authorizations. Some businesses are limited to specific areas, such as designated Wilderness zones or developed areas within the park and preserve.

In addition, the broader Denali Borough supports an estimated more than 40 active tour operators offering:

- **Flightseeing:** Denali Air, Kantishna Air Taxi
- **Rafting and Outdoor Adventure:** Denali Raft Adventures, New Wave Adventures
- **ATV and Zipline Tours:** Denali ATV Adventures, Denali Park Zipline
- **Bus and Wildlife Tours:** Alaska Nature Guides, Denali Backcountry Adventure
- **Winter Activities:** Dog mushing (e.g., EarthSong Lodge), aurora tour services

Table C-7. Operator Inventory

Operator Type	Seasonal Availability
Flightseeing and Helicopter	May—mid-September
Bus/Wildlife Tours	Mid-May—mid-September
Rafting/ATV	Late May—Labor Day
Dog Sledding/Aurora	Select operators only, December—March

C.3 Comparable Communities: Justification

C.3.1 Methodology Overview

To systematically compare gateway communities for their relevance to Denali, a scoring matrix was developed using the following methodology:

- **Criteria Selection:** Ten criteria were chosen based on factors most relevant to Denali's context, including population, visitor volume, remoteness, seasonality, economic structure, housing, infrastructure, transportation, livability, and season diversification.
- **Scoring Scale:** Each criterion is rated on a scale of 1 to 5, where 5 represents the most favorable or relevant match to Denali's conditions and 1 the least.
- **Community Assessment:** Four communities—Estes Park, West Yellowstone, Springdale, and Fayetteville—were evaluated and scored for each criterion based on available data and qualitative analysis.
- **Interpretation:** Higher total scores indicate a community's greater overall comparability and relevance as a Denali peer or case study.

C.3.2 Scoring Criteria

(1) **Population Size:** Preference for towns with populations similar to Denali's gateway region.
(2) **Annual Visitor Volume:** Similarity in visitor numbers to Denali's annual influx.
(3) **Distance to Major Airport:** Proximity to commercial airports, reflecting logistical challenges.
(4) **Seasonality of Tourism:** Degree of seasonal fluctuation in visitation and economic activity.
(5) **Economic Dependence on Tourism:** Extent to which the local economy relies on tourism.
(6) **Workforce Housing Availability:** Availability and affordability of seasonal worker housing.
(7) **Infrastructure Strain:** Degree of stress on roads, utilities, and public services during peak season.
(8) **Transportation Management Strategies:** Presence and effectiveness of shuttles, traffic controls, and other transportation-related systems
(9) **Community Livability Impact:** Effects of tourism on resident quality of life.
(10) **Diversification of Tourism Season:** Efforts to extend economic activity beyond peak months.

C.3.3 Scoring Matrix

Community	Population Size	Annual Visitor Volume	Distance to Major Airport	Seasonality of Tourism	Economic Dependence on Tourism	Workforce Housing Availability	Infrastructure Strain	Transportation Management Strategies	Community Livability Impact	Diversification of Tourism Season
Estes Park	3	4	2	3	3	2	3	4	3	3
West Yellowstone	1	5	1	1	5	1	2	2	2	1
Springdale	1	5	2	2	4	1	3	5	2	2
Fayetteville	4	2	3	4	3	3	3	3	4	

C.3.3.1 Scoring Key
5 = Most comparable/favorable to Denali
1 = Least comparable/favorable to Denali

C.3.4 Application
- Estes Park and Fayetteville score well for balanced population, moderate seasonality, and proactive management, making them strong analogs for Denali's challenges and opportunities.
- West Yellowstone and Springdale illustrate the extremes of seasonality and visitor-resident ratios, providing valuable cautionary lessons for Denali's planning.

C.3.5 Sources

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