Port of Seattle
Cruise Passenger Survey 2017
Prepared for:
Port of Seattle
November 8, 2017
Methodology

- Survey conducted at cruise ship docks in Juneau July 15-August 15
- Trained surveyors used intercept survey method
- 431 surveys conducted at 19 ship calls on 17 days
- Sample closely reflected Port of Seattle cruise market in terms of cruise line
- Survey designed in collaboration with Port of Seattle staff
- Screening process excluded:
  - Washington residents (11 percent of willing respondents)
  - Those who spent less than four hours in Seattle before/after cruise (35 percent of non-WA residents)
Overnighting in Seattle

- 90% combined: Did/will overnight in Seattle
- 82% overnighted in Seattle area before cruise
- 32% will overnight in Seattle area after cruise
- 10% did not overnight in Seattle area

- Average length of stay among overnighters: 2.0 nights
Seattle-Area Lodging Location

- **Downtown**: 65%
- **Near Airport**: 36%
- **Other Seattle**: 6%
- **Don’t know**: 3%

- Combines pre- and post-cruise responses
Transportation to Seattle

- **Air**: 92%
- **Car**: 6%
- **Amtrak**: 2%

• Note that Washington residents were screened out of survey and would likely have traveled by car.
Transportation to Seattle Cruise Terminal

- Shuttle from hotel: 28%
- Uber or Lyft: 18%
- Taxi: 17%
- Airport shuttle: 10%
- Personal vehicle: 10%
- Limo or town car: 7%
- Cruise line bus: 6%
- Light rail: 1%
- Car rental: 1%
- Walked: 1%
- Other: 2%
## Top 10 Activities in Seattle Area

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pike Place Market</td>
<td>64%</td>
</tr>
<tr>
<td>Shopping</td>
<td>44%</td>
</tr>
<tr>
<td>Space Needle</td>
<td>42%</td>
</tr>
<tr>
<td>Chihuly Garden and Glass</td>
<td>19%</td>
</tr>
<tr>
<td>Museums</td>
<td>15%</td>
</tr>
<tr>
<td>Waterfront Ferris Wheel</td>
<td>10%</td>
</tr>
<tr>
<td>Seattle Harbor Cruise</td>
<td>7%</td>
</tr>
<tr>
<td>Seattle Aquarium</td>
<td>6%</td>
</tr>
<tr>
<td>Seattle Underground Tour</td>
<td>5%</td>
</tr>
<tr>
<td>Wine Tasting</td>
<td>5%</td>
</tr>
</tbody>
</table>
Top 10 Sources for Planning Seattle Visit

- Travel websites: Expedia, Orbitz, Priceline, etc.
- Travel websites: 31%
- Hotel/lodging websites: 28%
- Travel agent: 22%
- Friends/family: 15%
- Cruise line websites: 15%
- Other websites: 4%
- Tour/activity websites: 3%
- Travel guides/books: 2%
- VisitSeattle.org: 2%
- Car rental websites: 2%
Booking Methods for Seattle Visit

- Hotel/lodging websites: 37%
- Travel websites: 22%
- Travel agent: 21%
- Cruise line websites: 6%
- Over the phone directly with business: 6%
- Tour/activity websites: 2%
- Airline: 1%

- Passengers made their Seattle arrangements an average of 4.5 months ahead of their trip
## Average Per-Party Spending in Seattle Area

<table>
<thead>
<tr>
<th>Category</th>
<th>Pre-Cruise</th>
<th>Post-Cruise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$398</td>
<td>$243</td>
</tr>
<tr>
<td>Food and beverage</td>
<td>$185</td>
<td>$161</td>
</tr>
<tr>
<td>Tours, activities, and entertainment</td>
<td>$107</td>
<td>$135</td>
</tr>
<tr>
<td>Rental car, gas, taxi, shuttles, rideshare</td>
<td>$94</td>
<td>$92</td>
</tr>
<tr>
<td>Gifts, souvenirs, clothing</td>
<td>$62</td>
<td>$64</td>
</tr>
<tr>
<td>Other</td>
<td>$4</td>
<td>$2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$850</strong></td>
<td><strong>$697</strong></td>
</tr>
</tbody>
</table>
Previous Seattle Travel

Previously Visited?

- First time visitors, 52%
- Visited Seattle before, 48%

Purpose of Previous Travel

- Pleasure, 69%
- Business, 13%
- Both, 18%
Likelihood of Returning to Seattle

In the next five years

- **Very likely, 22%**
- **Likely, 34%**
- **Unlikely, 27%**
- **Very unlikely, 10%**
- **Don't know, 6%**
Demographics

- Top states
  - California 14%
  - Texas 10%
  - Florida 8%
- Average party size: 3.2 people
- Gender
  - 57% female
  - 43% male
- Average age: 58 years