

Port of Seattle

Alaska Cruise Passenger Survey 2019

PREPARED FOR:

Port of Seattle

October 2019

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Executive Summary

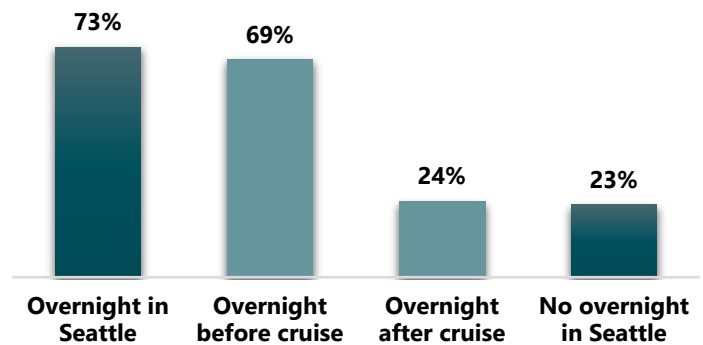
The Port of Seattle contracted with McDowell Group to conduct a survey of Alaska cruise passengers in summer 2019 regarding their time in Seattle. The personal intercept survey included 501 passengers encountered on Juneau’s cruise ship docks prior to embarkation. The sample schedule included 20 calls from 11 ships and mirrored the overall Seattle market in terms of cruise line.

Overnighting in Seattle

Nearly three-quarters of Seattle cruise passengers (73%) overnighted in Seattle before or after their cruise, while 23% did not overnight. An additional 4% were Seattle residents.

Passengers were much more likely to add nights before their cruise (69%) than after (24%). The average length of stay was about the same among each group: 1.5 nights before the cruise, and 1.6 nights after.

Overnighting in Seattle Before/After Cruise

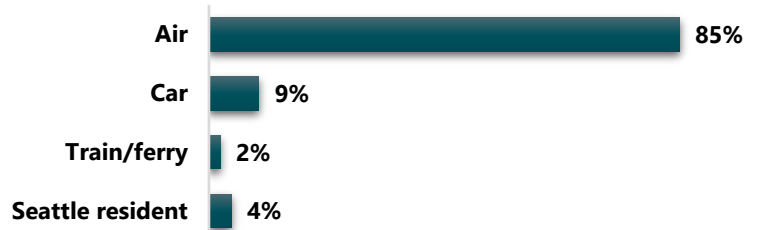


Note: An additional 4% of passengers were Seattle residents.

Transportation to Seattle

The vast majority of Seattle cruise passengers (85%) traveled to Seattle by air, with another 9% traveling by car, 1% by train, and 1% by ferry. Another 4% were Seattle residents.

Transportation to Seattle

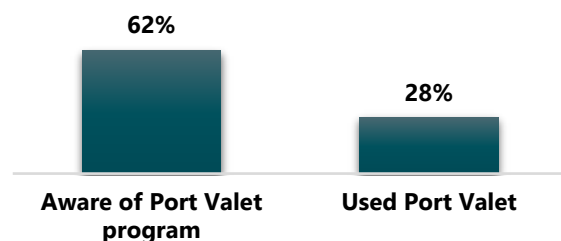


Port Valet Program

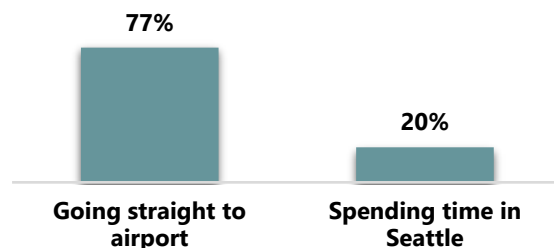
Passengers who had traveled to Seattle by air were asked about the Port Valet program, which provides luggage transport from the vessel to the airport. Nearly two-thirds of these passengers (62%) said they were aware of the program, and 28% planned to use it. (Usage among those aware of the program was 43%.)

Of those who were using it, 77% said they planned to go straight to the airport from their cruise ship, while 20% said they planned to spend time in Seattle. An additional 3% were not yet sure.

Air Passengers’ Usage of Port Valet Program

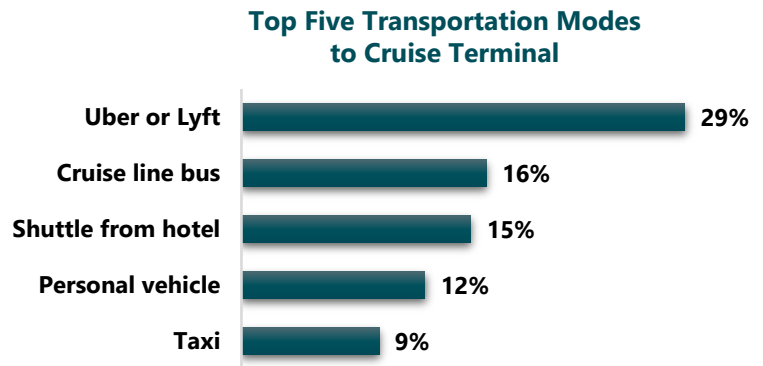


Port Valet Users’ Post-Cruise Plans



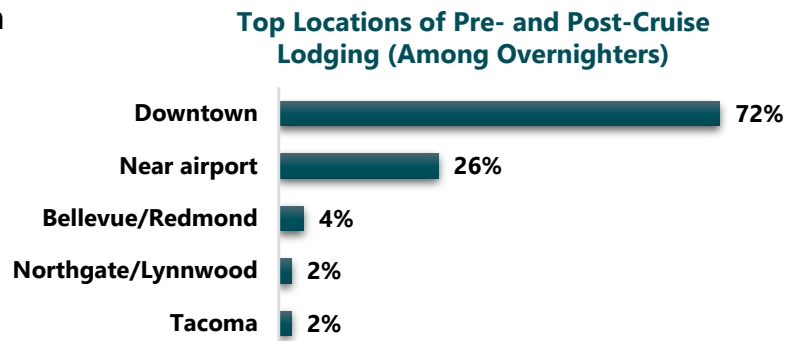
Transportation to Cruise Terminal

Passengers were asked how they accessed the Seattle cruise terminal. The most common methods were Uber or Lyft (29%), cruise line bus (16%), shuttle from hotel (15%), personal vehicle (12%), and taxi (9%). Other methods included limo/town car (6%), airport shuttle (5%), and walking (4%).



Pre- and Post-Cruise Lodging Area

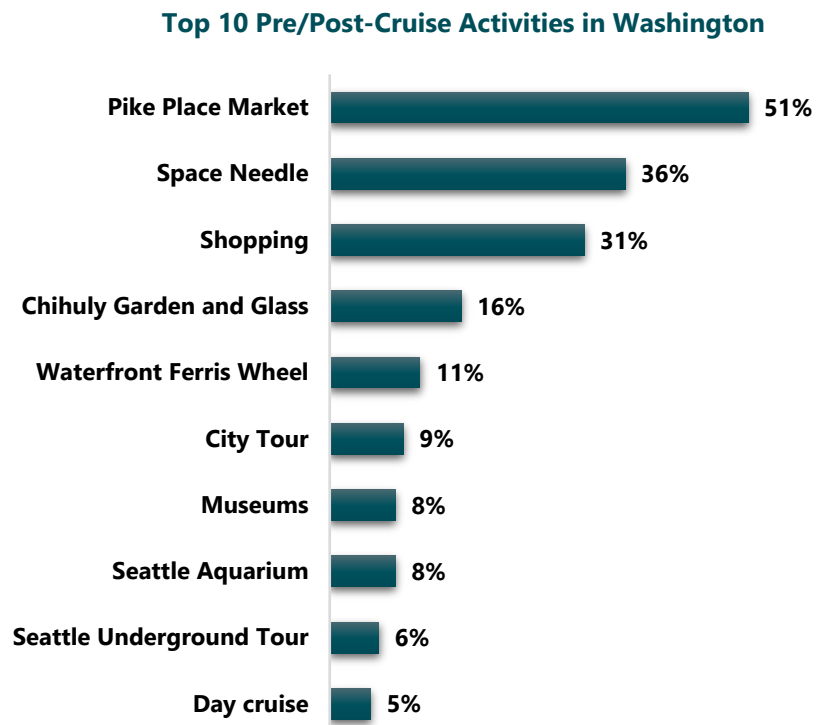
Among passengers who overnighted in the area either before or after their cruise, nearly three-quarters (72%) stayed in the downtown area, while 26% stayed near the airport. A small fraction stayed in Bellevue/ Redmond (4%), Northgate/Lynnwood (2%), and Tacoma (2%).



Pre- and Post-Cruise Activities

Passengers were asked what activities they had participated in before their cruise, and what they planned to participate in after their cruise, in Washington. Overall, 51% of passengers said they had participated in pre-cruise activities, and 26% said they planned to participate in post-cruise activities.

After combining responses for pre- and post-cruise, the most popular activities were Pike Place Market (51%), Space Needle (36%), shopping (31%), Chihuly Garden and Glass (16%), and Waterfront Ferris Wheel (11%).



Spending in Seattle

Passengers were asked to report what they had spent in Seattle before their cruise started, and what they anticipated spending after their cruise ended. Average pre-cruise spending was \$497 per-party, while post-cruise spending was \$163 per-party, for a total of \$660 combined. Per-person, passengers estimated spending \$143 pre-cruise and \$46 post-cruise, for a total of \$189.

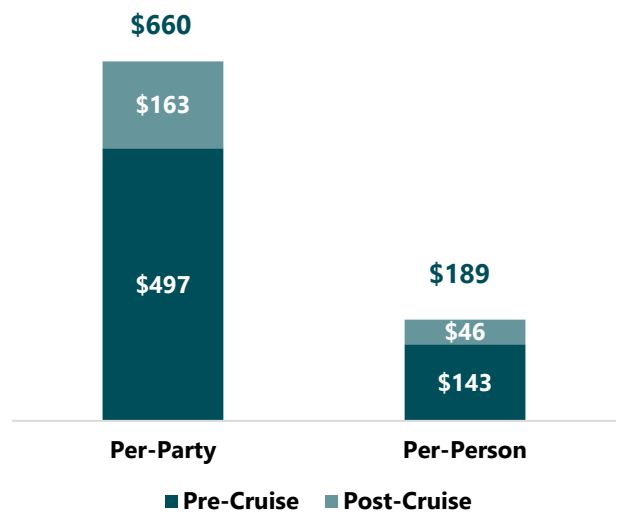
By category, lodging was the number one expense at \$326 per party and \$100 per person, followed by food/beverage (\$137 and \$39), tours/activities (\$76 and \$19), transportation (\$68 and \$17), and retail (\$37 and \$10).

Origin and Party Size

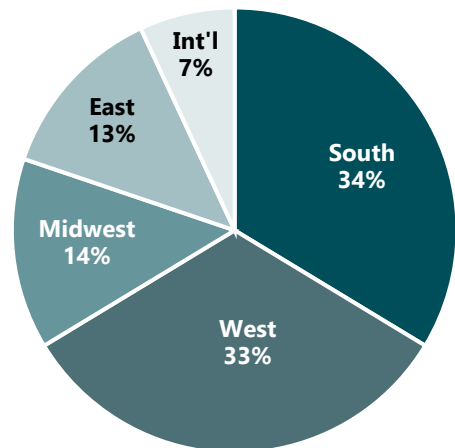
The South and the West were the top regions of origin among passengers at 34% and 33%, respectively, followed by Midwest (14%), East (13%), and international (7%). (See Appendix for a breakdown of states by region.) The top states of origin were California (12%), Texas (10%), Washington (9%), and Florida (7%). Among Washington residents, about half were from the Seattle area. The top international country was Canada (2%); all other countries represented 1% or fewer of passengers.

Passengers reported an average party size of 3.4 people. About half of passengers (46%) were in two-person parties.

Average Spending in Seattle



Passenger Origin



Introduction and Methodology

Introduction

The Port of Seattle contracted with McDowell Group, a research and consulting firm specializing in visitor industry research, to conduct a survey of Alaska cruise passengers about their experience in Seattle before and/or after their cruise. The survey was conducted in person at cruise ship docking areas in Juneau, targeting only those ships that used Seattle as an embarkation port. (All Seattle-originated ships include Juneau in their itineraries.) Areas of questioning included transportation methods, activities, lodging, length of stay, spending, trip planning, and demographics.

Methodology

The intercept survey was conducted between July 15 and August 15. The sample was carefully designed to reflect the Seattle cruise market sailing to Alaska; targeted ships and sample sizes were based on the Port of Seattle's total Alaska passenger capacity by ship and cruise line. The following cruise lines were included in the sample: Princess Cruises, Norwegian Cruise Line, Holland America Line, Royal Caribbean Cruise Line, Celebrity Cruises, and Carnival Cruise Line.

In terms of cruise lines, the sample was closely representative of the overall season. Norwegian passengers represented 31 percent of all Seattle passengers sailing to Alaska in summer 2019, and 32 percent of survey respondents. Holland America represented 18 percent of all passengers, and 18 percent of survey respondents. Princess represented 21 percent of all passengers and 21 percent of survey respondents. Royal Caribbean represented 13 percent of all passengers and 13 percent of survey respondents.

A total of 20 cruise ship calls were sampled on 16 days between July 15 and August 15, with roughly 25 surveys conducted for each call. The survey team exceeded the target sample of 450, with a total sample size of 501. The margin of error at the 95 percent confidence level is ± 4.4 percent. (Note: Survey results are representative of Seattle-originated cruise passengers calling at Juneau for the one-month sample period, rather than the entire May-September cruise season.)

Uniformed and trained surveyors approached passengers on a random basis several hours before sailing time. Passengers were screened to ensure they were sailing on the designated vessel.

The survey instrument was designed by the study team in cooperation with Port of Seattle staff. A copy of the survey is attached to this report.

This survey follows a similar survey conducted in summer 2017, also by McDowell Group. The methodology was modified in 2019 to include *all* cruise passengers; the 2017 survey screened out Washington residents and those who had not spent time in Seattle before/after their cruise. Because the survey populations differed, comparisons between the two surveys must be considered with the different samples in mind.

Transportation and Port Valet

- The vast majority of Seattle cruise passengers (85%) traveled to Seattle by airplane. Nine percent traveled by car, and 1% each traveled by ferry and Amtrak. Four percent were Seattle residents, and thus were screened out of this question.

Table 1. How did you travel to Seattle before starting your cruise: air, train, car, bus, or some other way? (%)
Multiple answers allowed

	% of Total n=501
Air	85
Car	9
Amtrak	1
Ferry	1
Seattle residents	4

- Respondents who had traveled by air were asked if they were aware of the Port of Seattle Valet program. Surveyors showed respondents a postcard describing the program when asking the question. Nearly two-thirds (62%) had heard of the program.
- Of those that had heard of the program, 45% said they were participating in it; 43% said they were not; and 13% didn't know. This means that 28% of *all* air passengers participated in the program. Based only to air passengers who did not plan to overnight in Seattle after their cruise, 38% participated in the program.
- Of those that said they were participating in the program, 77% said they were going straight to the airport after their cruise, while 20% said they were spending time in downtown Seattle first.

**Table 2. Are you aware of the Port of Seattle Valet program?
Are you participating in the program?
Do you plan to go straight to the airport after your cruise,
or will you spend time in downtown Seattle? (%)**
Base: Traveled to Seattle via air

	% of Base
Aware of the Port of Seattle Valet program	n=424
Yes	62
No	34
Don't know	3
Participating in the Port of Seattle Valet program (Base: Aware of program)	n=264
Yes	45
No	43
Don't know	13
Straight to Airport vs. Seattle Visit (Base: Participating in program)	n=118
Straight to airport	77
Spending time in Seattle	20
Don't know	3

- Uber/Lyft was the most popular method of traveling to the cruise terminal, mentioned by 29%. Other methods included cruise line bus (16%), hotel shuttle (15%), and personal vehicle (12%).
- Responses to this question were quite different in 2017, when the top transportation methods were hotel shuttle (28%), Uber or Lyft (18%), and taxi (17%), followed by personal vehicle (10%), airport shuttle (10%), and limo or town car (7%). While some of the change may be due to shifting consumer habits, the screening of Washington residents in 2017, as well as those who didn't spend time in Seattle before or after their cruise, are likely factors.

Table 3. What mode of transportation did you use to travel to the Seattle Cruise Terminal? (%)
Multiple answers allowed

	% of Total n=501
Uber or Lyft	29
Cruise line bus	16
Shuttle from hotel	15
Personal vehicle	12
Taxi	9
Limo or town car	6
Airport shuttle	5
Walked	4
Tour bus	1
Other	<1
Don't know/refused	1

Seattle Overnights and Lodging

- Nearly three-quarters of Seattle cruise passengers (73%) included an overnight in Seattle before and/or after their Alaska cruise. Passengers were much more likely to overnight before their cruise (69%) than after (24%). Nearly one-quarter (23%) did not overnight in Seattle, while 4% were Seattle residents.

Table 4. Seattle Overnight Visitation (%)

	% of Total n=501
Did or will overnight in Seattle	73
Overnighted in Seattle area before cruise	69
Will overnight in Seattle area after cruise	24
Did not and will not overnight in Seattle	23
Not applicable (Seattle residents)	4

- Among passengers who overnights in Seattle before their cruise, 70% stayed downtown, and 21% stayed near the airport. These passengers stayed in Seattle an average of 1.5 nights.
- Among passengers who planned to overnight in Seattle after their cruise, 52% planned to stay downtown, and 28% planned to stay near the airport. Overnights passengers planned to stay an average of 1.6 nights.
- When combining the samples of those staying pre-cruise and those staying post-cruise, 72% stayed downtown and 26% stayed near the airport. Their average length of stay was 2.0 nights.

Table 5. Where in the Seattle area was your lodging located (will your lodging be located)? (%)
How many nights did you spend (will you spend) in the Seattle area?

Base: Overnight in Seattle before/after the cruise

	Pre-Cruise % of Base n=347	Post-Cruise % of Base n=120	Combined % of Base n=364
Downtown	70	52	72
Near airport	21	28	26
Bellevue/Redmond	4	3	4
Northgate/Lynnwood	2	9	2
Tacoma	1	3	2
University District	<1	-	<1
Other	1	3	1
Don't know/refused	1	12	5
Average number of nights in Seattle area	1.5 nights	1.6 nights	2.0 nights

Activities and Spending

- Passengers were asked what activities they had participated in, and what they planned to participate in, before and after their Alaska cruise. About half of passengers (51%) reported participating in activities in Washington State before their cruise, while 26% planned to participate in activities after their cruise; over half (61%) reported they participated or would participate before and/or after their cruise.
- The most popular activities were Pike Place Market (51%), Space Needle (36%), and shopping (31%).

Table 6. What activities did you participate in before your cruise in Washington State? What activities do you plan to participate in on after your cruise in Washington State? (%)

n=501	Before Cruise	After Cruise	Combined
Participated and/or planned to participate in activities	51	26	61
Pike Place Market	39	13	51
Space Needle	23	13	36
Shopping	23	9	31
Chihuly Garden and Glass	12	5	16
Waterfront Ferris Wheel	9	3	11
City tour	3	6	9
Museums	5	3	8
Seattle Aquarium	4	4	8
Seattle Underground Tour	4	3	6
Day cruise	4	1	5
Wine tasting	1	1	2
Sporting event	1	1	3
Boeing Factory Tour	1	2	3
Casinos/gaming	1	<1	1
Duck Tour	<1	<1	1
Columbia Tower	<1	<1	1
Other	6	1	8
No activities	48	68	33
Don't know/refused	1	6	6

Seattle Area Spending

- Cruise passengers were asked how much they spent in the Seattle area before their cruise, and how much they expected to spend after their cruise. Combining pre- and post-cruise spending, passengers reported spending an average of \$660 per party and \$189 per person in the Seattle area.
- Average spending was much higher before the cruise than after, corresponding with the higher likelihood of pre-cruise overnights. Passengers estimated their pre-cruise spending at \$497 per party and \$143 per person, compared with post-cruise spending of \$163 per party and \$46 per person.
- By spending category, lodging accounted for about half of spending (\$326 per party and \$100 per person), followed by food and beverage (\$137 and \$39), tours/activities/entertainment (\$76 and \$19), transportation (\$68 and \$17), then gifts/souvenirs/clothing (\$37 and \$10).
- Seattle residents (4% of the total sample) were only asked about their spending on transportation to travel to and from the cruise terminal; all other spending before and after their cruise was assumed to be zero.

Table 7. Average spending in Seattle area before/after cruise

n=501	BEFORE CRUISE		AFTER CRUISE		TOTAL	
	Per Party	Per Person	Per Party	Per Person	Per Party	Per Person
Lodging	\$243	\$74	\$83	\$26	\$326	\$100
Food and beverage	106	31	31	8	137	39
Tours, activities, entertainment	58	14	18	5	76	19
Rental car, gas, taxi, shuttles, rideshare	45	12	23	5	68	17
Gifts, souvenirs, clothing	29	8	8	2	37	10
Other	16	4	-	-	16	4
Average spending	\$497	\$143	\$163	\$46	\$660	\$189

- Seattle passengers made their Seattle travel arrangements an average of 3.4 months ahead of time.
- Nearly one-third of passengers (29%) did not book anything. This corresponds with the 23% of passengers who did not spend any nights in Seattle before or after their cruise. Some passengers are likely to have stayed with friends or family in the area, and thus didn't need to make any advance arrangements.

Table 8. How far in advance did you make your Seattle travel arrangements?

	% of Total n=501
<1 month	12
1 month	9
2 months	10
3 months	11
4 months	8
5 months	3
6 or more months	14
Average number of months	3.4
Did not book anything	29
Don't know/refused	5

- Among passengers who booked a portion of their Seattle trip ahead of time, the most popular method of booking was hotel/lodging websites (39%) followed by travel websites (27%).

Table 9. What methods did your party use to book the Seattle portion of your trip?

Base: Booked Seattle travel arrangements

	% of Base n=358
Hotel/lodging websites	39
Travel websites (Expedia, Orbitz, Priceline, etc.)	27
Travel agent	11
Over the phone directly with business	5
Cruise line websites	3
Tour/activity websites	1
AAA	1
Other	5
Don't know/refused	10

- One-quarter of passengers (25%) said that visiting Seattle was very important when selecting their cruise itinerary, while another 18% said it was somewhat important, and 22% said it was not important. Nearly one-third (30%) said Seattle was part of their cruise itinerary.

Table 10. How important was visiting Seattle in your selection of your cruise itinerary? (%)

	% of Total n=501
Very important	25
Somewhat important	18
Not important	22
Cruise itinerary	30
Don't know/refused	1
Seattle residents	4

Previous and Future Seattle Travel

- One-half of passengers (50%) had visited Seattle before their cruise.

Table 11. Before this cruise, had you ever visited Seattle? (%)

	% of Total n=501
Yes	50
No	46
Don't know/refused	1
Seattle residents	4

- Over one-half of passengers (54%) said they were likely or very likely to return to Seattle in the next five years, while 36% said they were unlikely.

Table 12. How likely are you to return to Seattle in the next five years? (%)

	% of Total n=501
Very likely	25
Likely	29
Unlikely	26
Very unlikely	10
Don't know/refused	7
Seattle residents	4

- When asked how interested they would be in a future Pacific Northwest or BC cruise, over half of passengers (54%) were either somewhat or very interested, while 31% were not interested.

Table 13. How interested would you be in a future vacation consisting of a four to five-day cruise in the Pacific Northwest or British Columbia? (%)

	% of Total n=501
Very interested	14
Somewhat interested	40
Not interested	31
Don't know/refused	11
Seattle residents	4

Travel in Washington State

- Just one out of ten passengers said they either visited or planned to visit other areas of Washington State (besides Seattle) before or after their cruise.
- The 2017 survey found that 8% of passengers visited other areas of Washington State before or after their cruise. Note that the 2017 sample excluded Washington State residents.

Table 14. Are you visiting any other areas of Washington State before OR after your cruise? (%)

	% of Total n=501
Yes	10
No	86
Seattle residents	4

- Among those who traveled, or planned to travel, in Washington State before or after their cruise, the most popular destinations were Mt. Rainier (28%), Tacoma (16%), and Vancouver (10%). (Some respondents may have meant Vancouver, B.C., although the question specifically asked about Washington State.) A full list of “other” destinations can be found in the Appendix.

Table 15. What areas of Washington State are you visiting before or after your cruise? (%)

Base: Visiting other areas of Washington State

	% of Base n=50
Mt. Rainier	28
Tacoma	16
Vancouver	10
Snoqualmie Falls	8
Olympic Peninsula	6
Bellingham	6
Spokane	4
Mt. St. Helens	4
Eastern Washington	4
Other	26

Passenger Demographics

- The South and West were the two most common US regions of origin at 34% and 33%, respectively, followed by the Midwest (14%) and East (13%). The top states were California (12%), Texas (10%), Washington (9%), and Florida (7%). Just 7% of passengers were from international countries, including 2% from Canada. A full list of states by region can be found in the Appendix.
- Those from Washington State were asked which community they were from. About half were from the Seattle area, while the other half named communities across the state, with Spokane most frequently mentioned. A full list of communities can be found in the Appendix.

Table 16. Origin (%)
Showing U.S. states representing 2% or more of total

	% of Total n=501
Southern U.S.	34%
Texas	10
Florida	7
Georgia	2
Louisiana	2
Missouri	2
North Carolina	2
Virginia	2
Western U.S.	33%
California	12
Washington	9
Arizona	3
Oregon	3
Colorado	2
Midwestern U.S.	14%
Illinois	3
Michigan	2
Minnesota	2
Ohio	2
Eastern U.S.	13%
New York	3
Massachusetts	2
New Jersey	2
Pennsylvania	2
International	7%
Canada	2
Australia	1
UK	1

- Respondents reported an average party size of 3.4 people. The most common party sizes were two people (46%) and four people (20%).

Table 17. Party (%)

	% of Total n=493
1 person	4
2 people	46
3 people	12
4 people	20
5 people	5
6 or more people	13
Average size	3.4 people

Other Modes of Transportation to Cruise Terminal

Art Bus
City Bus

Other Areas of Lodging in Seattle

Bainbridge
Everett
An island across the Puget Sound.
Bothell
West Seattle

Other Areas of Washington State Visited

Bainbridge Island
Bremerton
Edmonds
Friday Harbor
Manson
Mt. Olympus
Olympia
Port Townsend
Puyallup
Renton (2)
South Coast (of Washington)
Walla Walla

Other Activities in Washington State

Air Show
Amazon HQ (3)
Ballard Locks
Botanical Gardens
Bubble gum wall
Chinatown (6)
Doughnut tour
Fleet Week (2)
Food Tour
Ghost Tour
Japanese Garden
Kerry Park
Mopop
Pacific Science Center
Parade
Pedal bike tour
Pioneer Square
Salmon Ladder
Seattle Center
Sky View
Smith Tower
Starbucks HQ
Theatre
Tram (2)
Troll

University of Washington
Wings Over Washington (4)
Zoo (2)

Other Methods of Booking Trip

Airline website (3)
AmEx site
Amtrak Website
Car service site
Ebates
Friend (2)
In Person (3)
Parking Website (3)
Rental Car Site
Through credit card's website

Other International Countries of Origin

Barbados
Hong Kong
Puerto Rico (2)
U.A.E.

Washington Communities of Origin (not including Seattle)

Anacortes (2)
Bonney Lake
Chehalis
East Wenatchee
Eastern Washington
Edmunds
Everett
Gig Harbor
Maltby
Olympia
Sequim
Spokane (4)
Tacoma
Vancouver (2)
Walla Walla
Wenatchee (2)

U.S. Regions by State

WEST: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

MIDWEST: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia

EAST: Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Washington DC