

AVSP 7 – Summer 2016

**Section 18:
Summary Profiles –
Cruise Type
2011 and 2016**

Summary Profiles: Cruise Type, 2011 versus 2016

This section shows survey results for cruise passengers, broken into three categories: round-trip, cross-gulf, and land tour. Results for both 2011 and 2016 are shown here (the 2011 AVSP report did not include results by cruise type).

**TABLE 18.1 - Market Definition and Sample Size
Cruise Type 2011 and 2016**

Market	Definition	% of Alaska Market	Sample Size	Maximum Margin of Error
Round trip 2011	Cruised both in and out of Alaska in 2011	33%	812	±3.4%
Cross-gulf 2011	Cruised one-way in/out of Alaska in 2011; did not participate in land tour	9%	447	±4.7%
Land tour 2011	Cruised one-way in/out of Alaska in 2011; participated in overnight land tour	14%	789	±3.5%
Round trip 2016	See above; 2016	43%	767	±3.5%
Cross-gulf 2016	See above; 2016	9%	380	±5.0%
Land tour 2016	See above; 2016	11%	700	±3.7%

Cruise type had a significant impact on visitor travel patterns, with a few exceptions.

- Trip purpose was consistent for the various cruise types, with between 96 and 100 percent of passengers traveling for vacation/pleasure in both 2011 and 2016.
- Transportation modes used to travel between communities differed between cross-gulf and land tour passengers (round-trip passengers generally only used cruise ships to travel between communities). Land tour passengers were much more likely to use a tour bus/van (76 percent) compared with cross-gulf passengers (50 percent); they were also much more likely to use the Alaska Railroad (74 versus 30 percent). Other transportation modes were used rarely by both cruise types.
- Usage rates for both tour bus/van and Railroad declined among land tour passengers between 2011 and 2016: from 94 to 76 percent for tour bus/van and from 94 to 74 percent for Alaska Railroad. Changes in the survey question may have played a role in this decline; tour bus/van was called "motorcoach/bus" in 2011, while "Alaska Railroad" was simply "train" in 2011.
- Land tour passengers (naturally) reported the longest average trip length at 11.3 nights, followed by cross-gulf passengers at 8.8 nights, then round trip passengers at 7.5 nights.
- The average length of stay among each cruise type changed slightly between 2011 and 2016: from 7.0 to 7.5 nights among round trip passengers; from 9.5 to 8.8 nights among cross-gulf passengers; and from 11.6 to 11.3 nights among land tour passengers.

- Regions visited varied considerably by cruise type. Round-trip passengers generally only visited Southeast. Nearly all cross-gulf passengers visited both Southeast and Southcentral, while 21 percent visited the Interior. Nearly all land tour passengers visited Southeast, Southcentral, and the Interior. Only 1 to 2 percent of any cruise type visited Southwest or Far North.
- Between 2011 and 2016, the only significant change in regional visitation was among cross-gulf passengers: the percentage visiting the Interior dropped from 39 to 21 percent.
- Communities visited varied by cruise type, with round trip passengers visiting primarily Southeast ports; cross-gulf passengers showing high rates of Anchorage and Seward visitation; and land tour passengers showing higher rates for Interior destinations.
- Between 2011 and 2016, rates of visitation by cross-gulf passenger dropped for several communities: from 38 to 20 percent for Denali; from 24 to 8 percent for Fairbanks; and from 18 to 9 percent for Talkeetna. Visitation rates increased for Hoonah/Icy Strait Point (from 25 to 48 percent) and Seward (from 47 to 65 percent).
- Lodging varied by cruise type, with round trip passengers solely using their cruise ship for lodging; cross-gulf passengers also using hotels/motels (61 percent) but rarely lodges (9 percent); and land tour passengers using both hotels/motels (86 percent) and lodges (59 percent) heavily. All other lodging types were used by 2 percent or less of each cruise type.
- Between 2011 and 2016, usage of hotels/motels increased among both cross-gulf passengers (from 55 to 61 percent) and land tour passengers (from 77 to 86 percent). Lodge usage decreased among both cross-gulf passengers (from 21 to 9 percent) and land tour passengers (from 66 to 59 percent).
- Round trip passengers generally showed lower participation rates (with the exception of shopping), while land tour passengers showed higher participation rates, and cross-gulf passengers fell in between. For example, 35 percent of round trip passengers participated in cultural activities, compared with 49 percent of cross-gulf passengers and 69 percent of land tour passengers. Likewise, 40 percent of round trip passengers participated in day cruises, compared with 55 percent of cross-gulf passengers and 67 percent of land tour passengers.
- Activity rates shifted more than a few percentage points between 2011 and 2016 for several activities. Wildlife viewing rates fell for both round trip passengers (from 29 to 20 percent) and land tour passengers (from 81 to 74 percent). Day cruises increased among cross gulf passengers (from 43 to 55 percent). Hiking/nature walk increased among round trip passengers (from 14 to 19 percent); cross gulf passengers (from 27 to 35 percent); and land tour passengers (from 31 to 38 percent). Flightseeing fell among land tour passengers from 29 to 18 percent.
- Satisfaction rates were fairly consistent across the three cruise types, with between 75 and 81 percent of passengers saying they were very satisfied with their Alaska trip. Between 2011 and 2016, the very satisfied rate increased from 69 percent to 76 percent among round trip passengers and from 71 to 81 percent among cross gulf passengers, while it fell from 79 to 75 percent among land tour passengers.

- Expectation ratings were likewise consistent across the three cruise types in 2016. Like the “very satisfied” rate, the “much higher than expectations” rate increased among both round trip and cross gulf passengers, but fell among land tour passengers, between 2011 and 2016.
- Round trip passengers were more likely than cross gulf or land tour passengers to rate value for the money as “much better” than other vacation destinations: 20 percent, versus 10 and 12 percent, respectively. The “much better” rating rose for round trip passengers (from 14 to 20 percent) between 2011 and 2016, while staying about the same for cross-gulf and land tour passengers.
- Cross-gulf passengers were slightly more likely to recommend Alaska (85 percent very likely) compared with round trip passengers (79 percent) and land tour passengers (78 percent).
- Round trip and cross gulf passengers were more likely than land tour passengers to return to Alaska in the next five years (28 percent very likely among round trip and cross gulf passengers, versus 13 percent among land tour passengers).
- The repeat travel rate was slightly higher among round trip passengers (28 percent) than among cross-gulf passengers (23 percent) and land tour passengers (22 percent). Rates in 2016 were similar to 2011.
- The rate of those who had traveled to Alaska via cruise ship was slightly higher among round trip passengers (22 percent compared to 16 percent for both other markets). This question was not asked in 2011.
- Trip planning timelines (the time of year when passengers decided on and booked their Alaska trip) were fairly consistent across the three cruise types, and between 2011 and 2016.
- Usage of the internet to plan and book their trip was consistent among the three cruise types. Internet usage declined among all types between 2011 and 2016: from 73 to 61 percent among round trip passengers; from 79 to 59 percent among cross gulf passengers; and from 75 to 60 percent among land tour passengers. Booking rates were more consistent between the two years for all types.
- Travel agent usage was higher among land tour passengers (66 percent) than among cross gulf passengers (53 percent) and round trip passengers (51 percent).
- Round trip passengers were much more likely to be from the Western U.S. (35 percent) compared with cross-gulf passengers (23 percent) and land tour passengers (16 percent). Origin was fairly consistent between 2011 and 2016.
- Land tour participants reported the highest average age (61.5 years) followed by cross gulf passengers (57.0 years) and round trip passengers (54.9 years). Average age increased among all three cruise types by several years between 2011 and 2016.
- Land tour passengers reported the highest average spending in Alaska at \$894 per person, followed by cross-gulf at \$882 and round trip at \$498. Between 2011 and 2016, spending stayed about the same among round trip passengers (from \$502 to \$498) while increasing among cross-gulf passengers (from \$836 to \$882) and land tour passengers (from \$858 to \$894). (Land tour passenger spending does not reflect spending on the accommodations, transportation, and tours in Alaska included in the tour package.)

**TABLE 18.2 - Trip Purpose
By Cruise Type, 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Vacation/pleasure	98	96	99	100	97	99
Visiting friends/rel.	-	1	<1	<1	1	<1
Business only	<1	<1	-	<1	1	<1
Business/pleasure	2	2	1	<1	1	<1

**TABLE 18.3 - Transportation Modes Used to Travel Between Communities
Cruise Type 2011 and 2016 (%)**

	Cross-Gulf 2011	Land Tour 2011	Cross-Gulf 2016	Land Tour 2016
Tour bus/van	54	94	50	76
Alaska Railroad	41	94	30	74
Rental vehicle	16	5	9	6
Air	6	8	3	6
Personal vehicle	3	1	1	<1
Rental RV	2	<1	1	<1
State ferry	1	2	-	1
Personal RV	<1	-	<1	<1

Note: Round-trip passengers are excluded from this table, as they travel between communities via cruise ship, which was excluded from this question.

**TABLE 18.4 - Length of Stay, Destinations and Lodging Type
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Average length of stay in Alaska	7.0	9.5	11.6	7.5	8.8	11.3
Regions Visited						
Southeast	99	98	100	100	99	99
Southcentral	5	94	97	2	97	97
Interior	1	39	96	<1	21	95
Southwest	2	2	1	2	<1	<1
Far North	-	1	3	-	<1	2
Destinations Visited, Top 10						
Juneau	98	96	93	100	99	97
Ketchikan	94	94	93	98	98	96
Skagway	73	89	91	76	94	94
Anchorage	4	85	80	2	90	83
Glacier Bay Nat'l Park	22	28	37	56	22	42
Denali Nat'l Park	1	38	95	<1	20	94
Seward	1	47	37	1	65	45
Fairbanks	1	24	69	<1	8	58
Hoonah/Icy Strait Point	8	25	23	16	48	25
Talkeetna	<1	18	39	-	9	34
Lodging Types Used						
Cruise ship	95	96	96	100	97	98
Hotel/Motel	1	55	77	<1	61	86
Lodge	<1	21	66	<1	9	59
Bed & Breakfast	-	7	2	-	2	2
Vacation Rental	n/a	n/a	n/a	-	2	1
Friends/Family	<1	3	1	<1	1	<1
Campground/RV	-	3	<1	-	1	1
Wilderness Camping	-	<1	-	-	-	<1
State Ferry	<1	-	<1	-	-	-

**TABLE 18.5 - Statewide Activities – Top 10
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Shopping	78	83	81	88	80	82
Wildlife viewing	29	51	81	20	55	74
Cultural activities	29	54	72	35	49	69
Day cruises	35	43	65	40	55	67
Train	37	61	90	37	57	86
City/sightseeing tours	46	51	53	41	49	54
Hiking/nature walk	14	27	31	19	35	38
Fishing	3	15	8	3	7	6
Flightseeing	13	22	29	12	24	18
Tramway/gondola	10	19	19	16	18	20

**TABLE 18.7 - Satisfaction Ratings
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Satisfaction with overall Alaska trip						
Very satisfied	69	71	79	76	81	75
Satisfied	28	26	20	22	17	24
Compared to expectations						
Much higher	25	26	36	31	30	29
Higher	37	42	37	36	39	34
About as expected	35	28	25	30	28	35
Value for the money						
Much better	14	11	12	20	10	12
Better	24	23	26	28	24	19
About the same	53	55	47	42	50	50
Likelihood to recommend and return to Alaska						
Very likely to recommend Alaska	79	79	82	79	85	78
Very likely to return to Alaska in next five years	23	24	15	28	28	13

**TABLE 18.8 - Previous Alaska Travel
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Been to Alaska before	25	21	21	28	23	22
Average # of vacation trips (base: repeaters)	2.5	2.5	1.5	2.6	2.2	1.7
Previously traveled in Alaska by cruise ship	n/a	n/a	n/a	22	16	16

**TABLE 18.9 - Trip Planning
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011		Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Trip Decision, by Quarter							
Before July 2010	19	16	24	Before July 2015	17	22	20
July-Sept 2010	20	20	21	July-Sept 2015	19	17	20
Oct-Dec 2010	19	24	17	Oct-Dec 2015	20	18	25
Jan-Mar 2011	24	24	23	Jan-Mar 2016	25	17	19
Apr-Jun 2011	15	12	9	Apr-Jun 2016	14	19	12
July-Sept 2011	3	4	2	July-Sept 2016	5	8	3
Trip Booking, by Quarter							
Before July 2010	9	3	6	Before July 2015	8	11	9
July-Sept 2010	16	14	14	July-Sept 2015	14	18	19
Oct-Dec 2010	19	21	26	Oct-Dec 2015	19	19	21
Jan-Mar 2011	30	38	34	Jan-Mar 2016	31	18	30
Apr-Jun 2011	21	18	15	Apr-Jun 2016	21	23	17
July-Sept 2011	6	7	3	July-Sept 2016	8	11	5
Internet and Travel Agent Usage							
Used internet	73	79	75	Used internet	61	59	60
Booked over internet	45	53	44	Booked over internet	47	49	45
Used TravelAlaska.com	19	27	30	Used TravelAlaska.com	16	21	21
Received Official State Vacation Planner	10	26	27	Received Official State Vacation Planner	8	14	19
Booked through travel agent	62	71	80	Booked through travel agent	51	53	66
Other Sources – Top 10							
Friends/family	42	45	51	Friends/family	50	40	52
Prior experience	16	17	14	Prior experience	16	15	12
Cruise line	63	61	60	Cruise line	41	33	32
Brochures	20	27	27	Brochures	12	16	15
AAA	16	19	33	AAA	9	9	14
Other travel/guide book	10	17	18	Other travel/guide book	4	7	11
Tour company	6	10	17	Tour company	6	4	8
Magazine	5	7	6	Magazine	4	3	5
Television	7	6	8	Television	6	3	5
Milepost	<1	3	3	Milepost	1	1	1

**TABLE 18.10 - Top 10 Websites/Apps Used to Plan/Book
Cruise Type 2016 (%)**

	Round Trip 2016		Cross-Gulf 2016		Land Tour 2016	
	Plan	Book	Plan	Book	Plan	Book
Airline websites	39	39	45	44	38	35
Cruise line websites	69	55	64	56	66	48
Google	27	2	33	1	27	1
Trip Advisor	28	4	31	4	25	2
Expedia	14	7	17	14	10	7
Hotel/lodge/RV Park	6	4	16	15	8	5
Tour company websites	8	5	13	5	16	11
Car/RV rental websites	2	1	7	5	4	3
Travelocity	10	2	9	3	5	3
Facebook	10	<1	6	-	5	-

Note: This question was not asked in 2011.

**TABLE 18.11 - Demographics
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Origin						
Western US	32	24	17	35	23	16
Southern US	24	30	24	22	28	31
Midwestern US	10	20	26	14	17	21
Eastern US	10	11	18	9	13	17
Canada	10	6	8	12	7	3
Other International	14	10	7	9	14	12
Other Demographics						
Average party size	2.6	2.7	2.4	2.6	2.5	2.4
Average group size	6.3	6.4	6.3	5.2	4.9	4.9
Male/female	44/56	47/53	46/54	44/56	46/54	46/54
Average age	51.4	49.6	56.7	54.9	57.0	61.5
Children in household	24	24	17	24	23	15
Retired/semi-retired	45	44	57	49	52	59
College graduate	59	61	61	63	65	67
Average income	\$106,000	\$112,000	\$107,000	\$115,000	\$126,000	\$115,000

**TABLE 18.12 – Visitor Expenditures, Per Person
Cruise Type 2011 and 2016 (%)**

	Round-Trip 2011	Cross-Gulf 2011	Land Tour 2011	Round Trip 2016	Cross-Gulf 2016	Land Tour 2016
Average per-person total spent in Alaska	\$502	\$836	\$858	\$498	\$882	\$894