

**Bringing new
customers onboard:**
UK cruise market
consumer insights



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Welcome

The growth of the cruise market over the last decade has created a golden opportunity for travel sellers and cruise providers.

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At Amadeus we're determined to help the industry benefit from this trend and drive even more growth. That's why we develop tools that make it easy to sell cruise products. It's why we extended our agreement with Cruise Lines International Association to include the UK & Ireland last year.

To drive the conversation on sales, we've again commissioned independent research¹ into the UK traveller's attitudes to cruise holidays. We've asked people what they want from a cruise holiday, talked to them about their perceptions of cruise and explored their experiences of booking and buying cruise.

Looking to the future, we've also focused on the next generation of cruise holidaymakers, asking younger 'Millennial generation' travellers to tell us how they view cruise.

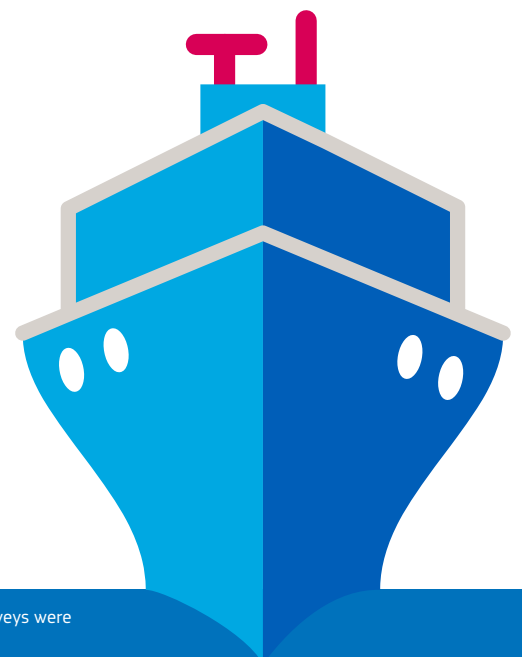
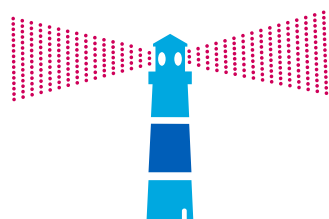
The picture that emerges is largely positive. A large proportion of British travellers are favourable to the idea of taking their first cruise. More than half of younger adults who holiday abroad say they would be tempted to go on a cruise.

But the data suggests that we must all focus on how we can entice people to take cruise holidays through greater engagement and further development of the cruise product. There's a clear opportunity to communicate the breadth of product, wide range of experiences and terrific value that cruise holidays offer to new and existing customers. The ability to offer more customised travel options will be key to tapping into a huge market of consumers who have not yet tried a cruise holiday. This is particularly true of the Millennial travellers.

Above all, the industry needs to continue to defy outdated pre-conceptions about cruise travel that the data reveals are still deterring some potential first-timers. Cruise holidays offer more variety and excitement than ever before. At Amadeus we're committed to working with the industry to sell that excitement to travellers.



Rose Fernandez
Director of Marketing,
Amadeus UK and Ireland



¹ Total sample size was 2070 adults. Fieldwork was undertaken between 20 – 21 April 2015 by YouGov plc. The surveys were carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).

At a glance

Amadeus UK and Ireland commissioned independent research specialists YouGov to find out what British holidaymakers think about cruise travel. Here are some of the highlights.



The data revealed that the cruise industry has a huge potential. 42% of adults who holiday abroad and have never taken a cruise would be tempted to do so in the future. Among travellers aged 25 – 34, this rises to 52%.

31%

of respondents would be more likely to book a cruise holiday if they were offered unique, interesting or hard-to-reach destinations.

7%

of all adults have booked or are planning to book a cruise holiday in the next 12 months.

There's a clear opportunity to educate consumers on the benefits of modern cruise travel:

32%

of respondents disagree that the industry makes cruise travel seem 'young, fresh and appealing'

Cost is respondents' number one concern:

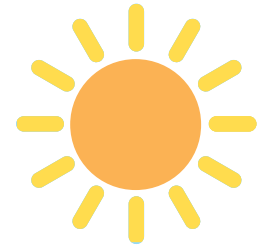
50%

worry about the overall cost of cruise holidays, with

35%

concerned about transparency on additional charges.

Respondents value their cruise travel agent most for their ability to provide up to date information on offers and deals (41%), followed by their ability to provide tailored travel options (38%) and give expert advice on the best travel destinations (35%).



Modern cruise means something for everyone

Cruise is a growing opportunity for travel agents and 2015 is predicted to be the best year to date for the UK Cruise market².

Over 1.7 million UK travellers will enjoy a cruise holiday this year and – according to research specially commissioned by Amadeus, some 7% of adults have booked or intend to book a cruise holiday in the next 12 months.

One of the most dynamic and innovative areas of leisure travel, the cruise industry continually refreshes and expands its range of products.

Today's cruise passenger can choose from a wider range of experiences than ever before, with products designed for couples, families and single travellers of all ages, in addition to the 'active seniors' who have long recognised the value of a cruise holiday.

Truly, all tastes are catered for with a bewildering range of cruise offerings available, from adventurous expeditions to activity-packed family packages and the more traditional luxury cruise holidays. There really is something for everyone.

The appetite is clearly there amongst travellers of all ages and demographics, the challenge for the industry is to capitalise upon this by offering some compelling, differentiated and relevant options that are tailored to the specific needs of today's travellers.



"I think cruise holidays could suit most people"

Survey respondent

² CLIA figure from Cruise Review 2014 (March 2015). The CLIA expects 2015 cruise passenger numbers to exceed the peak 1.72m passengers in 2013. http://www.cruising.org/sites/default/files/pressroom/UK_Ireland_MarketReport_2014.pdf

Meet your next cruise customers

Ready to set sail

The research reveals an opportunity for travel sellers and cruise providers to attract brand new cruise customers who don't typically opt for this type of holiday. 42% of adults who holiday abroad and have never taken a cruise say they would be tempted to take one in the future.

"I'd love to try wildlife cruises to places like Baja, California or Kamchatka"

Survey respondent

Encouragingly, younger adults are more open to the idea of going on a cruise: 52% of 25 - 34 year olds in the survey who haven't yet taken a cruise holiday would consider taking one.

30%

of travellers would consider swapping an all-inclusive land holiday with an all-inclusive cruise holiday of the same value.

To be able to attract this large customer base, travel sellers and cruise providers will need to innovate how they market cruise holidays and take into account the different needs of each customer when it comes to cruise travel.

Opportunities for cruise specialists, travel agents and cruise providers

The cruise industry has huge potential. Choice, flexibility and personalisation will drive cruise bookings this year.

Technology will be a key enabler of this growth. The cruise industry is on the right track when it comes to improving online research and booking but millennial travellers require a more sophisticated shopping and booking experience.

There is a clear opportunity to educate consumers on the benefits of cruise travel and communicate the breadth of cruise travel options.



Meet your next cruise customers

Getting personal

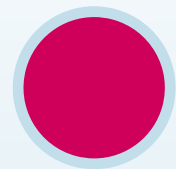
The data suggests that modern cruise travellers value the ability to tailor their holiday. When it comes to destinations, many travellers are looking for something out of the ordinary: 31% of respondents would be more likely to book a cruise if they were offered more unique, interesting or hard-to-reach destinations.

Tailoring the holiday experience would address respondent concerns about cruise travel such as a worry among 44% of respondents about being stuck on a ship for an extended period of time. 38% worried about not being able to enjoy their own personal space by getting away from other holidaymakers, while 29% were concerned about not being able to set their own itinerary.

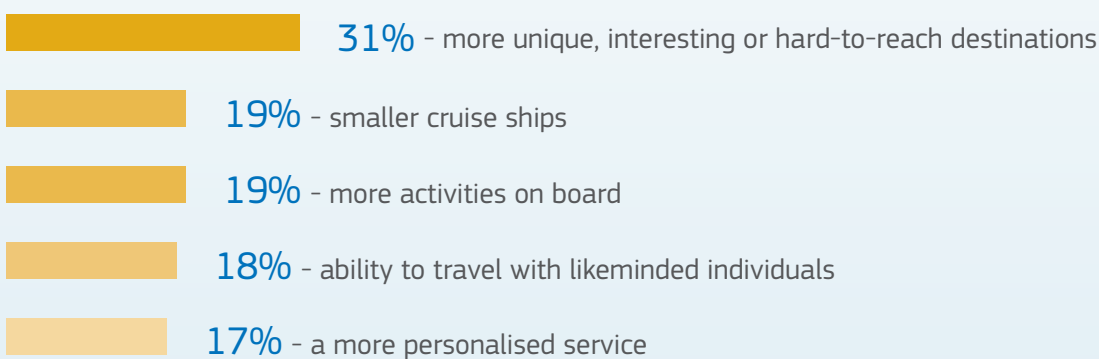
Perhaps surprisingly given these concerns, 'a more personalised service' comes fifth in travellers' ranking of factors that would influence them to take a cruise holiday. Diving

into the data, the 'Millennial generation' (aged 18 – 24) prioritises personalisation. A quarter (25%) of these travellers would favour a more personalised service on the ship, compared to 17% of respondents overall.

Underlining the growing importance of personalisation to these younger Millennial travellers, 39% say an inability to set their own itinerary would deter them from taking a cruise. In similar research, carried out for Amadeus by YouGov in 2013, the figure was 26%.



What would tempt travellers to take a cruise?



Meet your next cruise customers

Perception versus reality

A cruise holiday today comes in all shapes and sizes, with products that will appeal to most tastes, budgets and demographics.

However, the research suggests a significant proportion of travellers hold on to an outdated image of the industry.

32%

32% of respondents do not agree that the industry makes cruise seem 'young, fresh and appealing'.

Possibly connected to this view is the finding that

28%

of respondents are not aware of the listed dining, activity and entertainment features found on many modern cruise ships.

Cost is another important point of perception:

50%

of respondents see cruise holidays as too expensive, with lack of transparency on additional charges a particular concern for

35%

of respondents.

“Tips should be included in the price of the cruise”

Survey respondent



Meet your next cruise customers

Looking, comparing and booking

The good news is that 41% of travellers in the online survey think it's easy to research and compare cruise holiday options online. This shows that the industry is on the right track when it comes to improving the online research and overall booking experience.

However, more needs to be done as 59% of consumers online don't think it's easy to research and book a cruise holiday online. This gap in consumers' views about this issue needs to be addressed by the industry if it wants to encourage more people to book cruise travel.



Again, the experience of the Millennials shows signs of diverging: 10% of these 18 – 24 year old travellers are put off booking cruise holidays because of the research and booking process. In fact, Millennials were more than twice as likely to be deterred than the general population of respondents (10% versus 5%).

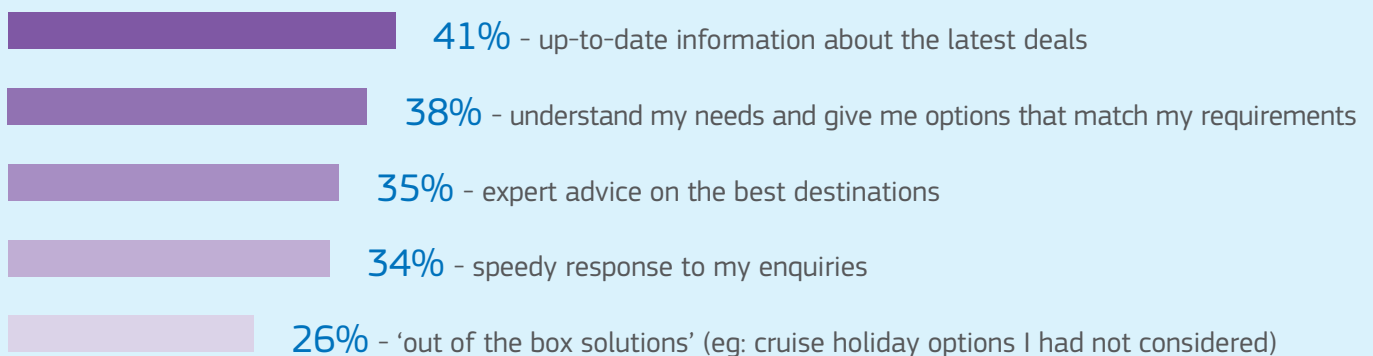
While the online channel plays an important role introducing people to their options, respondents still value the human touch that cruise specialists and travel agents bring to selling and arranging their cruise holiday. Here, respondents are looking to the travel professional for the latest deals and a personal service.

Offshore and online

While many people go on a cruise to get away from it all, there's still a strong appetite for on-board connectivity and technology services. Almost two thirds (62%) of respondents would want to find superfast WiFi on their cruise ship. Nearly a third (30%) want 24/7 technology support during their cruise holiday.



What do travellers want in a cruise travel agent?



Conclusion

This research aims to provide insights into the opinions and expectations of the prospective cruise traveller. Through this deeper understanding, we can better anticipate and meet their needs. With that in mind, the research suggests a number of conclusions:

Personalisation is key:

the ability to tailor the travel experience can effectively address respondents' concerns about being trapped or regimented on a cruise holiday. Bearing in mind that the next generation of cruise travellers – the Millennials – expects to be able to set their own agenda, personalisation is something the industry needs to make simple and seamless. Cruise sellers and cruise providers can tap into this growing market of travellers by innovating with technology that allows them to tailor the cruise experience to their needs.

Cruise travel agents count:

the research suggests consumers value the advice and personal service from cruise experts. With up-to-date information at their fingertips, cruise travel agents can be a decisive factor in closing sales.

Make a great impression:

many travellers report a satisfactory experience of researching and comparing cruise travel – but the next generation of prospective cruise holidaymakers is less impressed. Investment by travel sellers and cruise providers in their online presence could help them inspire younger travellers to seriously consider a cruise holiday and start a conversation with cruise travel experts.

Match perception with reality:

the research finds that outdated perceptions about cruise holidays are very persistent. Continued and better communication on the range of activities and experiences available today can counter these tired stereotypes.

It's very encouraging that the appetite for cruise travel across all travel groups is there. The challenge for the industry is to cater to the needs of those travellers who are open to the idea of a cruise, but who have yet to be convinced. By challenging outdated perceptions, customising cruise travel and communicating the breadth of cruise options to consumers, travel agents and cruise providers will be able to unlock a vibrant new segment of cruise travellers. This will create huge opportunities for growth and will encourage exciting innovations in the industry.

How Amadeus can help

Amadeus' travel technology is proven to 'fast track' the business performance of travel agencies, cruise specialists, cruise lines, airlines, hotels and other travel operators.

We help our customers connect to the number one business-to-business travel marketplace, wherever they are in the world. We also help travel sellers differentiate their offer to deliver better value and more personalised traveller experiences. And by understanding their businesses, we offer relevant products and services that help them drive down costs and boost revenues.

Thanks to Amadeus' position as the number one technology provider to the global travel industry, our cruise search and shopping platform, Amadeus Cruise Shop, will equip you with secure, real-time and reliable connections to many of the world's leading cruise lines.

Cruise Shop is designed to facilitate a natural conversation that converts enquiries into sales. It enables cruise specialists and travel consultants to concentrate on the needs of the customer, while Amadeus' user-friendly technology does the hard work.



To find out more about how Amadeus Cruise Shop delivers what you need to succeed in selling cruise, visit www.amadeuscruiseshop.co.uk or email sales@uk.amadeus.com.

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