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2010 Cruisers' Road to Decision

The Role of Digital on Cruise Travelers
Google/OTX
U.S, September 2010

Research Methodology

- Category Covered: Cruise

- Survey of 5,000 travelers

- An augment of 1,500 affluent personal travelers was also recruited

- Partnered with OTX; interviews conducted 4/10 – 4/27

Traveler Types Defined

Personal Traveler
has taken at least one trip for leisure in the past 6 months

Business Traveler
has taken at least three trips for business in the past 6 months

Affluent Traveler
has taken at least one trip for leisure in the past 6 months and has a household income of $200K+

Key Findings

1   1 in 3 vacationers are undecided on a cruise line and destination they want prior to starting their research.

2   The Internet, especially search engines, are the top choice for cruise research.

3   Carnival remains market leader; however, business cruisers favor others like Disney and Princess Cruises.

4   98% of consumers comparison shop, mainly with Google, and choose their cruise line based on price.

5   Compared to this study last year, consumers compare lines using Google more and are booking online more.

1 in 3 personal vacationers are unsure of cruise line and destination before researching

Certainty of **Cruise Line & Destination**
Before Researching

34%

65%

■ Extremely/Very ■ Moderately/Not very/Not at all
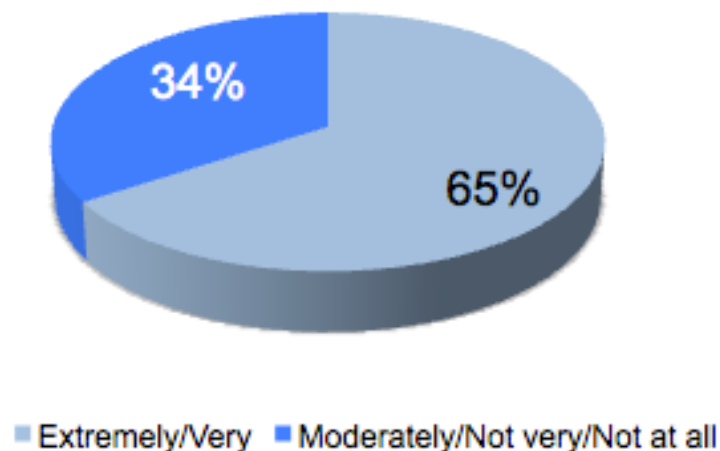
Base: Personal Travelers (576)

There is great opportunity to capture the undecided personal travelers to encourage them to cruise on your ships.

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About 1 in 4 affluent travelers are unsure of cruise line and destination before researching

Certainty of **Cruise Line & Destination**
Before Researching

28%

72%

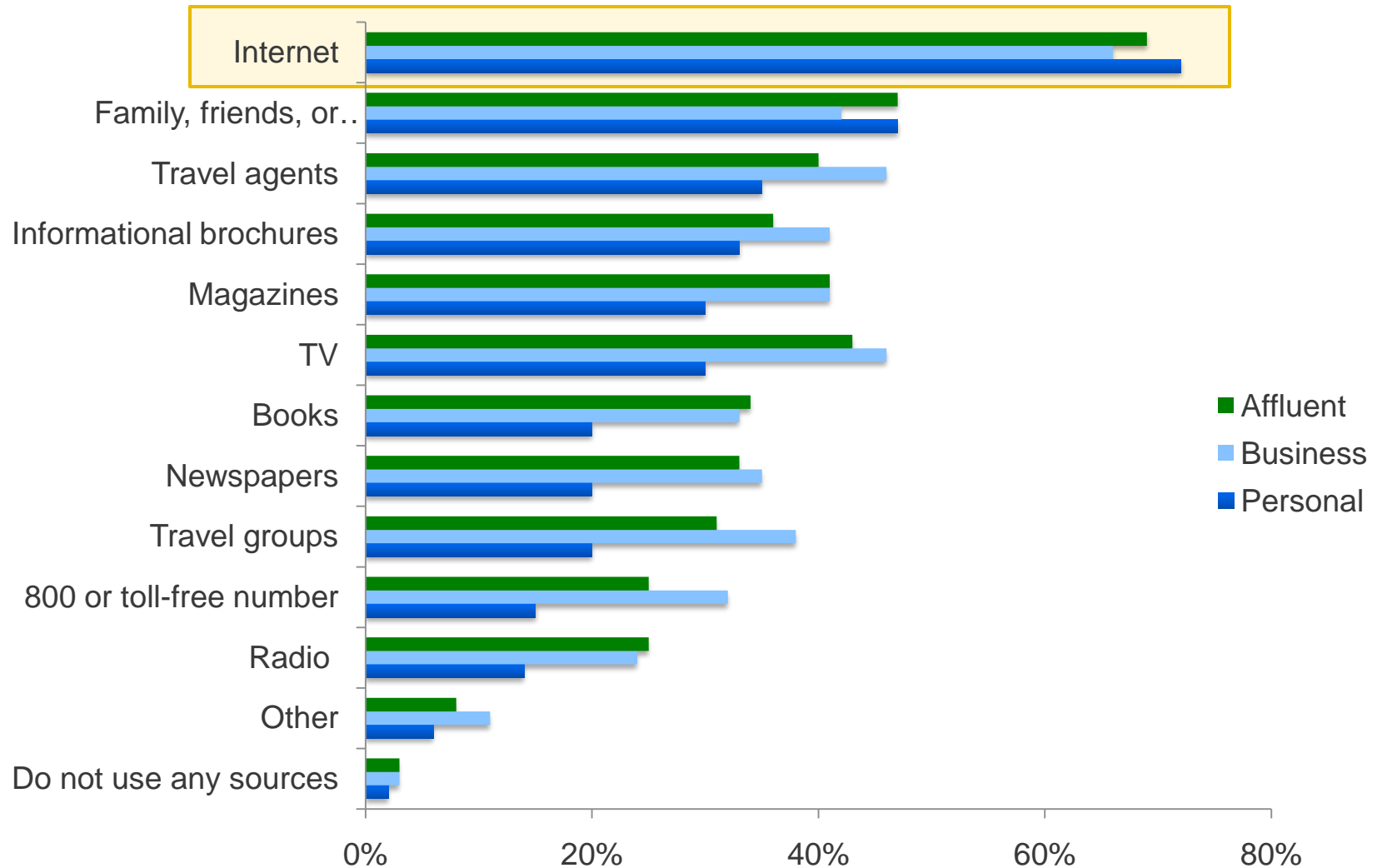■ Extremely/Very   ■ Moderately/Not very/Not at all
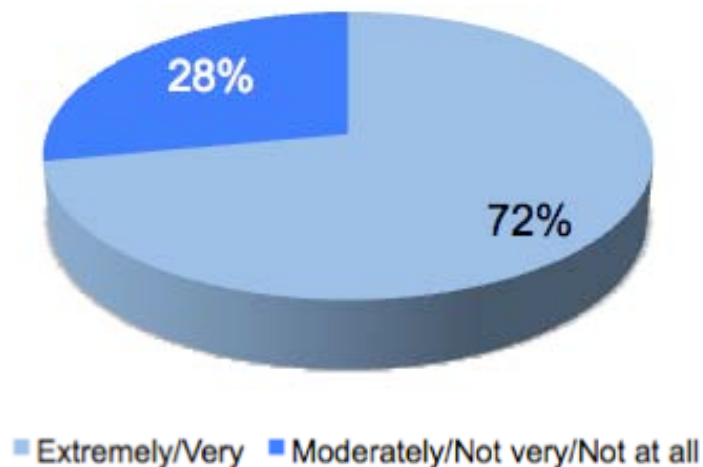
There is great opportunity to capture the undecided affluent to encourage them to cruise on your ships.

Base: Affluent Travelers (600)

Source: 2010 Traveler's Road To Decision - Cruise, Google/OTX, September 2010
(QW2) Thinking about how you typically decide on which cruise to book for a personal vacation, how certain are you about the cruise line you want to use before you begin researching?
(QW3) Thinking about how you typically decide on which cruise to book for a personal vacation, how certain are you about the destination you want to visit before you begin researching?
Box indicates a significant difference from comparable group at 95% confidence

The Internet dominates as the top choice for cruise research

Chart showing sources used for cruise research by Affluent (dark green), Business (light blue), and Personal (blue) travelers, with values ranging from 0% to 80%:

- **Internet**: highest, approximately 68–72% (highlighted)
- **Family, friends, or...**: ~42–47%
- **Travel agents**: ~35–46%
- **Informational brochures**: ~33–41%
- **Magazines**: ~30–41%
- **TV**: ~30–46%
- **Books**: ~20–34%
- **Newspapers**: ~20–35%
- **Travel groups**: ~20–38%
- **800 or toll-free number**: ~15–32%
- **Radio**: ~14–25%
- **Other**: ~6–11%
- **Do not use any sources**: ~2–3%

Legend:
- Affluent
- Business
- Personal

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Cruise consumers go online to book

Ways Used to Book Cruise

Legend:
- Personal (dark blue)
- Business (light blue)
- Affluent (green)
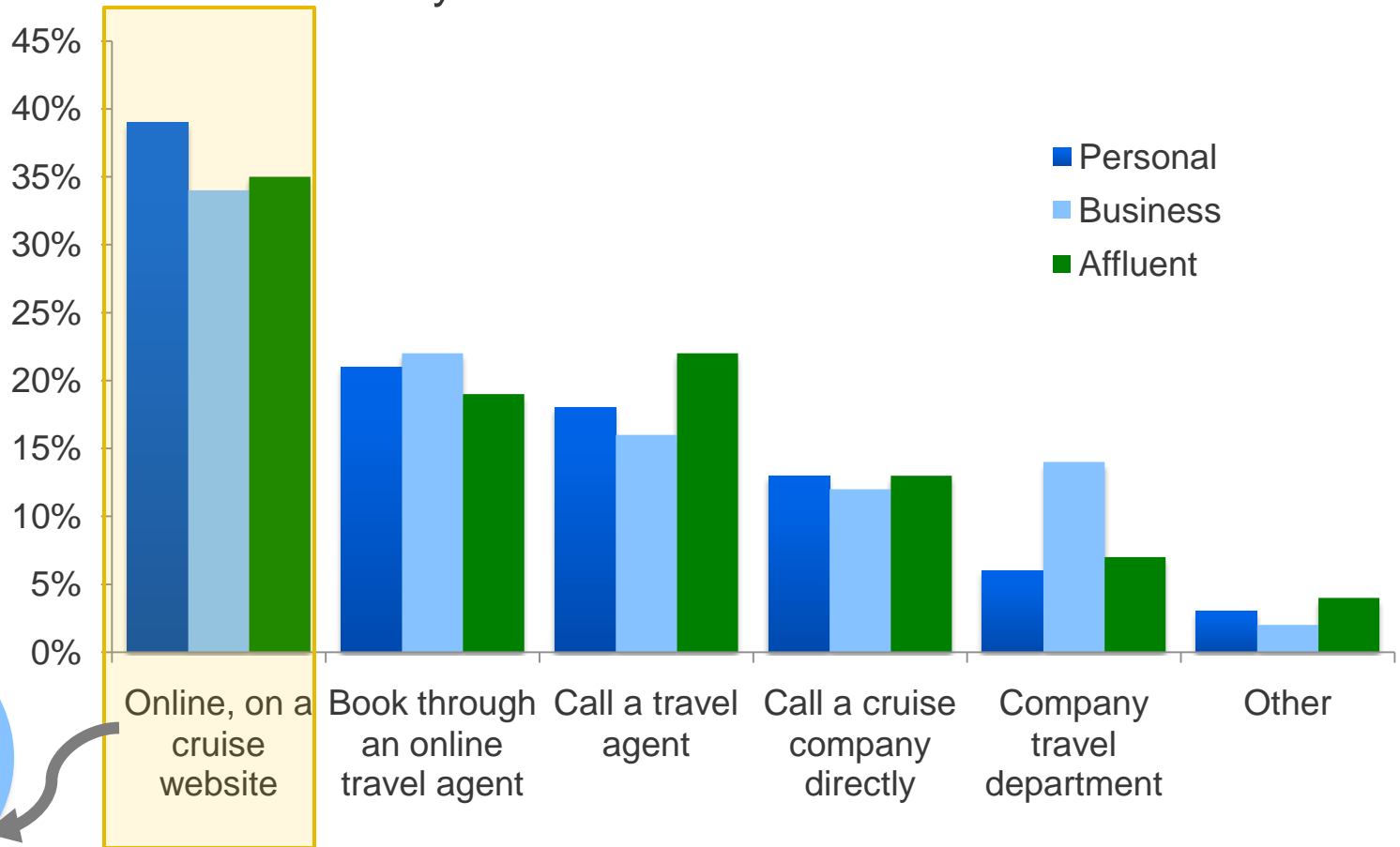
5% more book online compared to 2009

Categories: Online, on a cruise website | Book through an online travel agent | Call a travel agent | Call a cruise company directly | Company travel department | Other

Ensure your booking engine is accessible, simple, and complete for consumers to easily and quickly purchase their cruise.

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On cruise websites, detailed information, easy booking process, and search drive decisions

Cruise Website Important Consumer Features

PERSONAL

1. *Detailed cruise information*
2. *Easy booking/check-out process*
3. Variety of options: Destinations & ports
4. *Search capabilities*
5. Familiarity with the cruise line
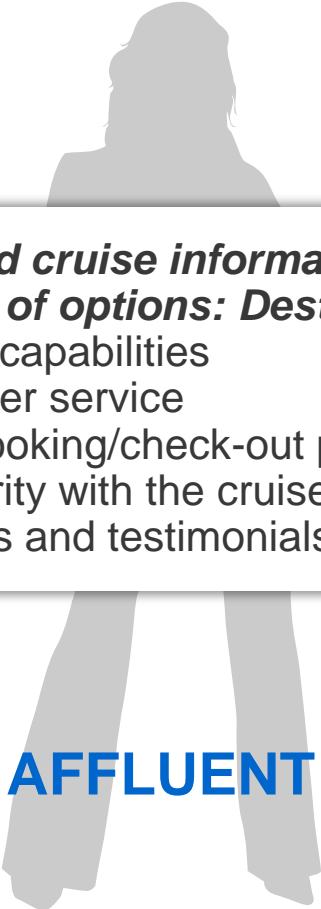6. Customer service
7. Reviews and testimonials

BUSINESS

1. *Search capabilities*
2. *Detailed cruise information*
3. *Easy booking/check-out process*
4. Customer service
5. Reviews and testimonials
6. Variety of options: Destinations & ports
7. Familiarity with the cruise line

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On cruise websites, detailed information and variety of options drive affluents' decisions

Cruise Website Important Consumer Features

1. ***Detailed cruise information***
2. ***Variety of options: Destinations & ports***
3. Search capabilities
4. Customer service
5. Easy booking/check-out process
6. Familiarity with the cruise line
7. Reviews and testimonials

AFFLUENT

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Price is key for personal travelers' commitment

Important Features When Choosing Cruise Line
(Personal Travelers Top 2 Box)

Feature	Percentage
Price	81%
Past experience with cruise line	75%
Length of cruise	74%
Destinations or routes available	72%
Type of accommodations available	72%
Activities offered while onboard	71%
Promotions	68%
Amenities	67%
Home port	64%
Recommendation from friend/family/colleague	64%
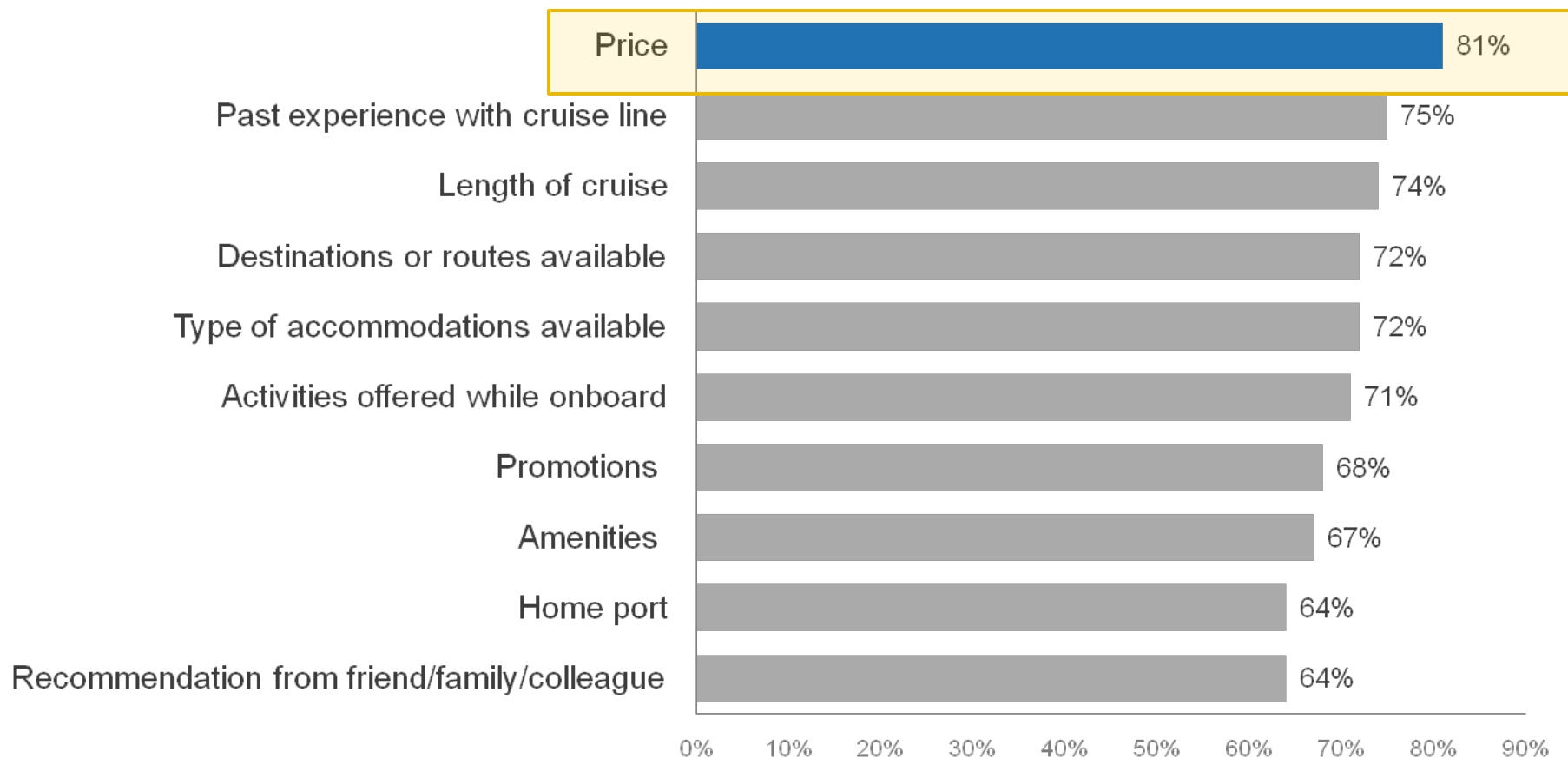
Compelling price points in search and display ads are crucial for bookings.

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Accommodations and cruise destination & length are keys to persuading affluents'

Important Features When Choosing Cruise Line - Affluents

Feature	Percentage
Type of accommodations available	77%
Length of cruise	76%
Destinations or routes available	76%
Price	74%
Past experience with cruise line	72%
Activities offered while onboard	71%
Amenities	71%
Promotions	69%
Home port	68%
Size of the ship	68%
Recommendation from friend/family/colleague	67%
Online reviews of cruise lines	66%
Excursions offered at ports	66%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

Compelling accommodation images in display ads are crucial for affluents.

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Personal travelers actively comparison shop…

98%
Some extent every time

72%
always/ frequently

3%
more than 2009

…when researching their cruise vacation.

Marketers must have a comprehensive and competitive search strategy complemented with remarketing across the Google Display Network to lure new and existing users to book quicker.

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Affluent travelers actively comparison shop…

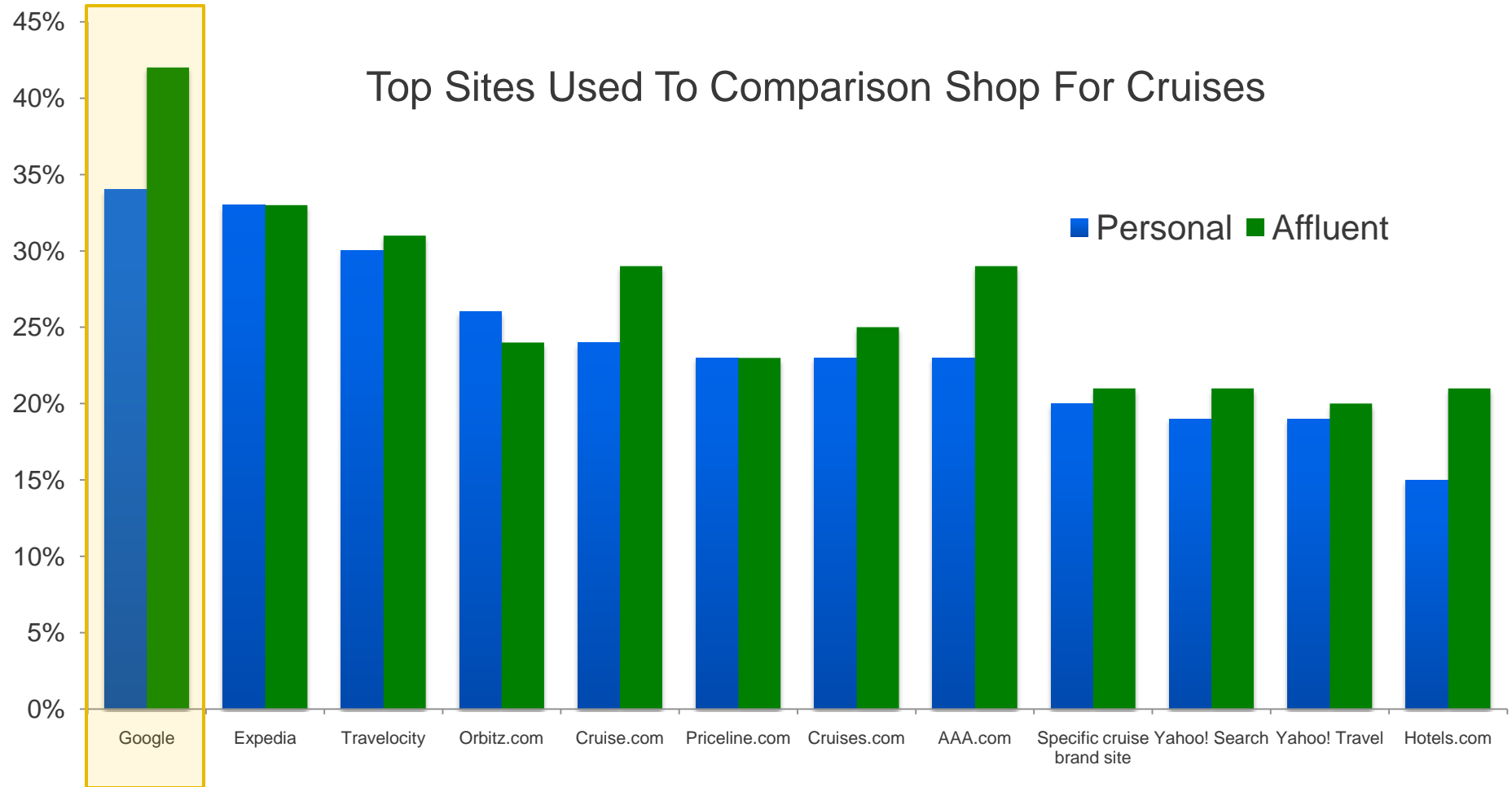**97%**

Some extent every time

76%

always/frequently

…when researching their cruise vacation.

Marketers must have a comprehensive and competitive search strategy complemented with remarketing across the Google Display Network to lure new and existing users to book quicker.

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No cruise line owns full market penetration

Cruise Lines Used (Past 6 Months)

Cruise Line	Personal	Business	Affluent
Carnival Cruise Lines	47%	49%	47%
Royal Caribbean	23%	33%	34%
Disney Cruise Line	21%	40%	34%
Norwegian Cruise Line	16%	27%	28%
Princess Cruises	15%	35%	28%
Celebrity Cruises	13%	30%	30%
Crystal Cruises	10%	32%	28%
Holland America Line	11%	25%	28%
Oceania Cruises	9%	25%	25%
Regent Seven Seas Cruises	6%	21%	22%
Windstar Cruises	4%	12%	10%

most used, over 35%

There's opportunity to target the three types of cruise consumers with tailored, relevant messaging to gain market share.

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Source: 2010 Traveler's Road To Decision - Cruise, Google/OTX, September 2010
(QW7) Which cruise lines have you used for personal/business reasons in the past 6 months?

Data into Action: Marketing Opportunities

1 Craft persuasive ad text and display banners to encourage the undecided traveler to cruise with your brand.

2 Develop an extensive online booking engine that is easy to navigate and user-friendly to allow quick online bookings.

3 Publish competitive price points in your ads and on your site help drive personal travelers' decisions.

4 Target affluents by promoting multiple accommodation types and length & destination options.

5 Develop an "always-on" comprehensive search and display strategy to be top of mind across the Internet to capture the majority that frequently comparison shop.

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