

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The US cruise market continues to grow at a steady pace. Converting interest into action among adults who have never cruised is the key to passenger growth. Cruisers want personalized experiences that allow for enough time and flexibility to explore destinations the way they want, as well as innovative activities, a variety of dining options, and top entertainment to occupy their time aboard."

- John Poelking, Leisure Analyst

This report looks at the following areas:

- US market largest and growing, but losing share
- Cruises losing the competition with land-based vacations
- Demonstrating value to Potential Cruisers

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

US market largest and growing, but losing share

Figure 1: Number of cruise passengers originating in the US, 2012-17

Cruises losing the competition with land-based vacations

Figure 2: Cruise value, by Captured and Potential Cruisers, July 2017

Demonstrating value to Potential Cruisers

Figure 3: Vacation inspiration, by Captured and Potential Cruisers, July 2017

The opportunities

Strong desire signals potential

Figure 4: Cruise vacations taken and interest in cruising, July 2017

Despite three dominant brands, still room for entry

Figure 5: Global share of ocean cruise passengers, by cruise line, 2016

New cruisers, new destinations

Figure 6: Cruise destinations traveled, 2008 and 2017

River cruises growing

Figure 7: New ships on order, 2017-26

Positive perceptions show sustainability

Figure 8: Perceptions of cruises, July 2017

Destinations, excursions drive decisions

Figure 9: Cruise motivators, July 2017

What it means

The Market – What You Need to Know

Steady growth in US-sourced passengers

Destinations drive growth

Travelers demand authenticity

High potential for new-to-cruising crowd

The US Cruise Market

Cruise capacity continues to increase, growth follows

Figure 10: Number of cruise passengers originating in the US, 2012-17

Market Breakdown

Bahamas making strides

Figure 11: Cruise destinations traveled, 2008 and 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Big three represent significant majority of global ocean passengers
Figure 12: Global share of ocean cruise passengers, by cruise line, 2016

Market Perspective

Unique experiences and beaches entice travelers
Casino spending on the rise
Adults enjoy relaxing outdoors

Market Factors

Young population boosts potential cruising
Figure 13: Population by age, 2012-22

More frequent cruising on the rise
Figure 14: Number of cruises taken in the last three years, 2008 and 2017

Port regions seeing significant growth
Figure 15: US household share, by region, 2007-16

Per passenger spend remaining steady
Figure 16: Average amount spent per passenger, 2008-17

More ships means more passengers
Figure 17: New ships on order, 2017-26

Key Players – What You Need to Know

Carnival dominates, Asia growing
The new and familiar collide
Can't fully escape the past
Make it bigger

Leading Cruise Lines

Contemporary brands
Carnival Corporation & plc
Royal Caribbean Cruises Ltd
Norwegian Cruise Line Holdings
Genting Hong Kong Ltd
Figure 18: Annual global revenues of leading contemporary cruise brands (\$ millions), and percentage change 2015-16

Disney Cruise Line
Premium brands
Princess Cruises
Holland America Line
Celebrity Cruises
Luxury brands
Regent Seven Seas Cruises
Crystal Cruise Lines
Carnival continues to expand

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Cruise lines used in the last three years, 2008 vs 2017

What's Working?

River cruises bursting

Figure 20: Viking River Cruises "Explore Enchanting Destinations" email, July 2017

Incentivizing families to come aboard

Figure 21: Carnival Cruise Line "Bring the Whole Bunch" email, July 2017

Love for the familiar builds community

Early loyalty spurs frequent cruising

Figure 22: Royal Caribbean "Come Seek" TV commercial, October 2015

What's Struggling?

Accidents leave stains on cruise reputations

Environmental missteps lead to fines

North America losing market share

Voluntourism takes a hit

What's Next?

Bigger and better

Doors cracking open to Cuba

Figure 23: Norwegian Cruise Line "Top Five Reasons to Cruise to Cuba with Norwegian" mail ad, June 2017

Seamless integration with wearable tech

Figure 24: The SeaSeeker Teaser, June 2017

Turning the focus to the next generation of cruisers

Embarking to Asia

Luxury travel brands taking to the seas

The Consumer – What You Need to Know

Cruise interest high

Lots of potential for cruisers

Relaxing in the sun is key to vacations

Cruisers see value in reputation

Destinations, activities draw people in

Paying more for excursions

Destinations most important for Captured Cruisers

Activities should highlight the new

Making memories on the high seas

Potentials motivated differently

Cruise Participation and Interest

Half of adults have ever been on a cruise

Figure 25: Cruise vacations taken and interest in cruising, July 2017

Younger adults captured by cruising

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Cruise vacations taken, by age, July 2017

Likelihood of past cruising increases with income

Figure 27: Cruise vacations taken, by household income, July 2017

Segments of Cruisers

Figure 28: Cruise segments, July 2017

Captured Cruisers (33%)

Figure 29: Cruise segments – Captured Cruisers, by demographics, July 2017

Potential Cruisers (29%)

Figure 30: Cruise segments – Potentials, by demographics, July 2017

Disinteresteds (20%)

Figure 31: Cruise segments – Disinteresteds, by demographics, July 2017

Lapsed Cruisers (12%)

Figure 32: Cruise segments – Lapsed, by demographics, July 2017

Deserters (6%)

Figure 33: Cruise segments – Deserters, by demographics, July 2017

Activities Cruisers Enjoy

Cruisers engage in a greater variety of vacation activities

Figure 34: Activities past three year cruisers enjoy vs all, July 2017

Tropical locations beget sunny activities

Figure 35: Activities past three year cruisers enjoy, by cruise destination, July 2017

Cruise brands highlight activity variations

Figure 36: Activities past three year cruisers enjoy, by cruise line used, July 2017

Vacation Booking Considerations

Cost, word of mouth crucial to inspire cruisers

Figure 37: Vacation inspiration, by Captured and Potential Cruisers, July 2017

User reviews may be the best way to reach Potentials

Figure 38: Vacation research, by Captured and Potential Cruisers, July 2017

Younger Potentials take advice online, older use more traditional media

Figure 39: Vacation booking considerations – Potential Cruisers, by age, July 2017

Cruise Motivators

Destinations and activity options drive interest

Figure 40: Cruise motivators, July 2017

Potentials crave new experiences

Figure 41: Cruise motivators, by Captured and Potential Cruisers, July 2017

Parents see value, non-parents want to socialize

Figure 42: Cruise motivators – Potential Cruisers, by parental status, July 2017

Cruise Purchases

Excursions drive cruise purchase desires

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 43: Cruise purchases, July 2017

Men and women want to be indulged in different ways

Figure 44: Cruise purchases, by gender, July 2017

Parents pay to relax

Figure 45: Cruise purchases, by parental status, July 2017

Perceptions of Cruises

Favorable ideas of relaxing cruises

Figure 46: Perceptions of cruises, July 2017

Experienced cruisers more enthusiastic

Figure 47: Perceptions of cruises, by Captured and Potential Cruisers, July 2017

Younger Potential Cruisers generally more positive

Figure 48: Perceptions of cruises – Potential Cruisers, by age, July 2017

Older adults are more likely to think cruises are “for them”

Figure 49: Perception cruises are appealing to people my age – All vs Potential Cruisers, by age, July 2017

Attitudes toward Cruise Destinations

Destinations crucial to the cruise experience

Figure 50: Attitudes toward cruise destinations, July 2017

Potential Cruisers more interested in the ship

Figure 51: Attitudes toward cruise destinations, by Captured and Potential Cruisers, July 2017

Parents want to dive deep

Figure 52: Attitudes toward cruise destinations, by parental status, July 2017

Attitudes toward Cruise Activities

Potential Cruisers enjoy new, simple experiences

Figure 53: Attitudes toward cruise activities, by Captured and Potential Cruisers, July 2017

Older adults more social, younger more adventurous

Figure 54: Attitudes toward cruise activities – Potential Cruisers, by age, July 2017

Parents more accepting of the familiar

Figure 55: Attitudes toward cruise activities – Potential Cruisers, by parental status, July 2017

Attitudes toward Cruise Motivations

Celebration through relaxation

Figure 56: Attitudes toward cruise motivations, by Captured and Potential Cruisers, July 2017

Younger Potential Cruisers want a getaway

Figure 57: Attitudes toward cruise motivations – Potential Cruisers, by age, July 2017

Segments of Potential Cruisers

Factors

Figure 58: Potential Cruiser segments, July 2017

Cozy Communals (27%)

Demographics

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Cruises - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Characteristics

Opportunities

Figure 59: Potential Cruiser segment – Cozy Communals, by demographics, July 2017

Sedate Sailors (27%)

Demographics

Characteristics

Opportunities

Figure 60: Potential Cruiser segment – Sedate Sailors, by demographics, July 2017

Tranquil Travelers (24%)

Demographics

Characteristics

Figure 61: Potential Cruiser segment – Tranquil Travelers, by demographics, July 2017

Opportunities

Aging Adventurers (22%)

Demographics

Characteristics

Opportunities

Figure 62: Potential Cruiser segment – Aging Adventurers, by demographics, July 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Direct marketing creative

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 63: Global deployed capacity share, 2016

Appendix – The Consumer

Figure 64: Activities past three year cruisers enjoy, by destination of cruise, July 2017

Figure 65: Demographics of next generation cruiser

Figure 66: Attitudes toward family, October 2016-November 2016

Figure 67: Attitudes Potential Cruisers like to do on vacation, October 2016-November 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com