

Cruises - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“High street travel agents play an important role in the decision-making process of cruise holidays. As cruises are set to become a more valuable part of the wider holidays market, opportunities arise for travel agents to claim their position of being 'cruise specialists'”.

– Marloes de Vries, Travel Analyst

This report looks at the following areas:

- Cruise holidaymakers need guidance in making the right decisions
- Cruise sector challenged to overcome image of being too expensive

Demand for cruise holidays is set to continue to increase further in coming years, though 2019 will be a slower year due to cautious booking behaviour in light of Brexit. Looking longer-term, growth will be driven by the large pool of consumers who are considering a cruise holiday, modernisation of existing ships, and strong capacity growth.

Although older consumers still play a dominant role in cruise taking, there is a lot of ground to gain among the younger generations, especially when it comes to sea cruising. Having no additional costs on board remains an important aspect for potential cruisers, although the younger generation are more open to the idea of flexible price tiers. Furthermore, food options on board and lots of time to explore destinations are things where cruise lines can stand out from each other.

**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 - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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
Products covered in this Report

Executive Summary

The market

Sea cruise market continues to grow in 2019, albeit at a slower pace

Number of sea cruise holidays forecast to grow significantly in 2020 and beyond

Figure 1: Forecast volume of UK & Ireland sea cruise holidays (number of trips), 2013-23

The value of sea cruises is projected to grow above holiday market average

Figure 2: Forecast value of UK & Ireland sea cruise holidays, 2013-23

Shorter breaks increasingly popular

The UK population is getting older

Companies and brands

Cruise capacity continues to grow year-on-year

Crystal opens bookings for river cruises three years in advance

The Ritz-Carlton Yacht Collection aims to be a home away from home

The consumer

Interest in sea and river cruise holidays is equally high

Figure 3: Interest in cruise holidays, by usage, November 2018

Younger generation shows highest level of interest in taking a sea cruise

First-time cruisers show high interest in cruise and stay holidays

Figure 4: Interest in cruise holiday types, by cruise experience, November 2018

Destination more impactful than cruise ship in decision-making process

Figure 5: Cruise booking behaviours, November 2018

Food options on board more important than entertainment

Figure 6: Most important factors for potential cruisers, by rank, November 2018

Younger generation wants to stay connected

Older consumers expect the most from all-inclusive cruises

Figure 7: Products/services expected to be included in the price, by age, November 2018

Managing expectations among first-time cruisers

The costs hold back the majority of those not interested in cruise holidays

Figure 8: Barriers to cruising, by cruise experience, November 2018

What we think

Issues and Insights

Cruise holidaymakers need guidance in making the right decisions

The facts

**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 - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

The implications

Cruise sector challenged to overcome image of being too expensive

The facts

The implications

The Market – What You Need to Know

Sea cruise market continues to grow in 2019, albeit at a slower pace

Number of sea cruise holidays forecast to grow significantly in 2020 and beyond

River cruise market shows double digit growth

Shorter breaks increasingly popular

All-inclusive concepts benefit from relatively low value of the Pound

Holidaymakers in search for more value for their money

The UK population is getting older

Market Size and Forecast

Sea cruise market continues to grow in 2019, albeit at a slower pace

Figure 9: UK & Ireland sea cruise market passenger volume and value, 2013-23

Number of sea cruise holidays forecast to grow significantly in 2020 and beyond

Figure 10: Forecast volume of UK & Ireland sea cruise holidays (number of trips), 2013-23

The value of sea cruises is projected to grow above holiday market average

Figure 11: Forecast value of UK & Ireland sea cruise holidays, 2013-23

Forecast methodology

River cruise market shows double digit growth

Figure 12: UK & Ireland river cruise market passenger volume, 2012-17

Market Segmentation

Sea cruise passengers still predominantly 50+

Figure 13: Age analysis of UK & Ireland sea cruise market, 2017

Shorter breaks increasingly popular for sea cruises

Figure 14: Top three sea cruise destinations UK & Ireland market, by age and quarter, 2017

Europe leading destination for river cruises

Figure 15: UK & Ireland river cruise market passenger volume, by destination, 2017

Market Drivers

Travellers make more cautious decisions because of economic uncertainties

All-inclusive concepts benefit from relatively low value of the Pound

Figure 16: Pound versus euro and US Dollar, 20 May 2016-21 January 2019

Holidaymakers in search for more value for their money

Figure 17: Top 15 overseas holiday destinations for UK holidaymakers, Q1-Q3 2017 versus Q1-Q3 2018

Cruise sector challenged to reduce shipping emissions

The UK population is getting older

Figure 18: (Forecasted) population by age, 1966-2066

**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 - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Companies and Brands – What You Need to Know

- Cruise capacity continues to grow year-on-year
- Crystal opens bookings for river cruises three years in advance
- The Ritz-Carlton Yacht Collection aims to be a home away from home
- Amadeus River Cruises develops more efficient ship
- Azamara Club Cruises launches City Stays programme
- Getting Millennials on board

Cruise Companies and Market Share

- Cruise capacity continues to grow year-on-year
 - Figure 19: Global key facts top four cruise companies
- Some 2019 highlights from selected brands
- Royal Caribbean invests in app, upgrades existing ships, and acquires private islands
 - Figure 20: Royal Caribbean International's private island CocoCay in The Bahamas
- MSC Cruises offers around the world itineraries and will launch voice-enabled digital assistant
- The Ritz-Carlton Yacht Collection aims to be a home away from home
 - Figure 21: Suites on The Ritz-Carlton Yacht Collection
- Crystal opens bookings for river cruises three years in advance and launches new website

Launch Activity and Innovation

- Technological innovation to improve guest experience
- MSC Cruises will launch digital assistant in March 2019
- Celebrity Cruises introduces Magic Carpet and Infinite Balcony
 - Figure 22: Celebrity Cruises' Magic Carpet
- Amadeus River Cruises develops more efficient ship
- Bringing stories to life
- STAR TREK: THE CRUISE™ IV set to sail in March 2020
- Replica of the Titanic set to sail in 2022
- Acquiring and upgrading private islands to drive demand
- Royal Caribbean's CocoCay opens in May 2019
- Ocean Cay MSC Marine Reserve opens in November 2019
 - Figure 23: MSC Cruises' private island Ocean Cay in the Bahamas
- Letting passengers immerse themselves in the destination
- Azamara Club Cruises launches City Stays programme
- Scenic Luxury Cruises & Tours offers National Geographic River Cruises
- Getting Millennials on board
- Uniworld Boutique River Cruise
 - Figure 24: Rooftop lounge on U by Uniworld's river cruise ships
- Norwegian Cruise Line strengthens presence in Alaska

The Consumer – What You Need to Know

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 - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Interest in sea and river cruise holidays is equally high
 Younger generation shows highest level of interest in taking a sea cruise
 First-time cruisers show high interest in cruise and stay holidays
 Destination more impactful than cruise ship in decision-making process
 Food options on board more important than entertainment
 Older consumers expect the most from all-inclusive cruises
 The costs hold back the majority of those not interested in cruise holidays

Participation and Interest in Cruising

Interest in sea and river cruise holidays is equally high
 Figure 25: Participation and interest in sea and river cruise holidays, November 2018
 Figure 26: Attractiveness of sea and river cruise holiday images – Qualitative study, November 2018

Many consumers are open to undertaking the first cruise of their lives
 Figure 27: Interest in cruise holidays, by usage, November 2018

Younger generation shows highest level of interest in taking a sea cruise
 Figure 28: Age profile of those interested in cruise holidays, November 2018
 Figure 29: Socio-economic profile of those interested in cruise holidays, November 2018

Interest in Cruise Holiday Types

First-time cruisers show high interest in cruise and stay holidays
 Figure 30: Interest in cruise holiday types, by cruise experience, November 2018

Budget cruises appeal especially to first-time cruises

Interest in multigenerational cruises is much higher among younger generation
 Figure 31: Interest in cruise holiday types, by age, November 2018

Cruise Booking Behaviours

Destination more impactful than cruise ship in decision-making process
 Figure 32: Cruise booking behaviours, November 2018

Travel agents are key in the research and booking process of cruise holidays
 Figure 33: Cruise booking behaviours, by age, November 2018

Influencing Decision-Making

Food options on board more important than entertainment
 Figure 34: Most important factors for potential cruisers, by rank, November 2018

Younger generation wants to stay connected
 Figure 35: Most important factors for potential cruisers, by age, November 2018

All-inclusive Expectations

Older consumers expect the most from all-inclusive cruises
 Figure 36: Products/services expected to be included in the price, by age, November 2018

Managing expectations among first-time cruisers
 Figure 37: Number of products/services expected to be included in the price – Repertoire by cruise experience, November 2018

**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 - UK - February 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Barriers to Cruising

The costs hold back the majority of those not interested in cruise holidays

Figure 38: Barriers to cruising, by cruise experience, November 2018

Safety features could encourage more families with younger children to take a cruise

Figure 39: Proportion of consumers who have 'concerns about safety', by parental situation and age of children, November 2018

Appendix – Data Sources, Abbreviations, and Supporting Information

Definitions

Abbreviations

Consumer research methodology

CHAID analysis

Key driver analysis

Appendix – Market Size and Forecast

Volume forecast for sea cruise holidays

Figure 40: Forecast volume of UK & Ireland sea cruise holidays (number of trips), 2018-23

Value forecast for sea cruise holidays

Figure 41: Forecast value of UK & Ireland sea cruise holidays, 2018-23

Forecast methodology

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