



CRUISE TRAVEL REPORT  
JANUARY 2018



CRUISE LINES INTERNATIONAL ASSOCIATION

Established in 1975, **Cruise Lines International Association (CLIA)** is the world's largest cruise industry trade association, providing a unified voice and leading authority of the global cruise community, CLIA supports policies and practices that foster a safe, secure, healthy and sustainable cruise ship environment and is dedicated to promoting the cruise travel experience.

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CLIA represents the interests of three critically important members:

**50+**

**Cruise Lines:**

From ocean to specialty cruise ships, CLIA Cruise Lines represent more than 95 percent of global cruise capacity.

**340**

**Executive Partners:**

As key suppliers and partners to the cruise lines, executive partners play a major role in the successful operation of cruising, including ports & destinations, ship development, suppliers, and business services.

**35K**

**Travel Professionals:**

Our travel agency members include the largest agencies, hosts, franchises, and consortia in the world.

**25M**

**Cruise Passengers:**

Cruise annually aboard CLIA Cruise Lines worldwide.



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## 43 Summary

# METHODOLOGY

The *Cruise Travel Report* shares information about the motivations and preferences of vacationers in the U.S. and Canada, including and comparing those who have taken a cruise. CLIA enlisted research firm J.D. Power to conduct the survey to better understand the vacation habits, characteristics and behaviors of these two groups.

J.D. Power conducted a web-based survey of its Consumer Panel in August 2017, targeting consumers who:

1. Are 18 years of age or older,
2. Earn more than \$50,000 annually
3. Had taken a vacation in the past three years.

The survey collected cruise and travel opinion data from 792 cruisers and 813 non-cruisers, 90% of whom live in the U.S. and 10% of whom live in Canada. The dates of birth of the demographic groups cited in the report are as follows:

1982-1998 **Gen Y/Millennial**  
1967-1981 **Gen X**  
1948-1966 **Boomers**  
1917-1947 **Traditionalists**



**J.D. POWER**

## KEY FINDINGS



### FRIENDSHIP

Last year marked the Year of FriendSHIP for cruisers, who enjoy traveling in groups. In fact, travelers who take a cruise are 40% more likely to travel with friends, partners/companions or children than their land-based peers. In 2017, more travelers took vacations to spend time with family than they did in 2016.

### DESTINATION SNACKING

Cruisers see cruises as a great way to sample different destinations and cities for later vacations. Millennials are inherent snackers, they love to try new things before they go all in. And, increasingly they are likely to return to destinations visited first via a cruise. Indeed, all age cohorts (except Gen X) show a greater likelihood of returning to a destination visited on a cruise than in 2016.



### CRUISING ACROSS INCOMES

Income plays little role when labeling cruises as the better of the two vacation options—66% of people making less than \$100K name cruises the winner over land-based options, as did 70% of those making more than \$200K.

### HIGH SATISFACTION = LOYAL CRUISERS

The loyalty of cruisers to their preferred vacation type remains strong. More than half of cruisers (58%) believe that a cruise is the best type of vacation, a perception that remains consistent. They find high satisfaction in river cruises (81%) and ocean cruises (73%), followed by land-based hotels and resorts (62%). Nine out of 10 say they “probably or definitely will” cruise again.



## KEY FINDINGS

### KIDS ARE JUST THE HOOK

On average about 41% of cruisers say they are interested in kids' services, including babysitting, and programs for children and teens. But only 13% are reporting they actually use these services. In contrast, only 32% say they want onboard entertainment while more than twice that many (70%) attend once onboard. Indeed, entertainment, including shows, musicals and comedy, is the most used feature on cruises.



### MILLENNIALS RAISE THE SALES

The percent of Millennials who “definitely will” book a cruise for their next trip increased from 63% to 70% this year. We are also seeing millennials develop a taste for luxury. Their share of the Premium and Luxury segments is higher than average for these segments.

### AGENTS PROPEL CRUISING

Travel agents are the most likely influencer of vacation-planning and decision-making for cruisers, who are twice as likely (70%) to use a travel agent when booking a vacation than non-cruisers (37%).



### CRUISE “STATES”

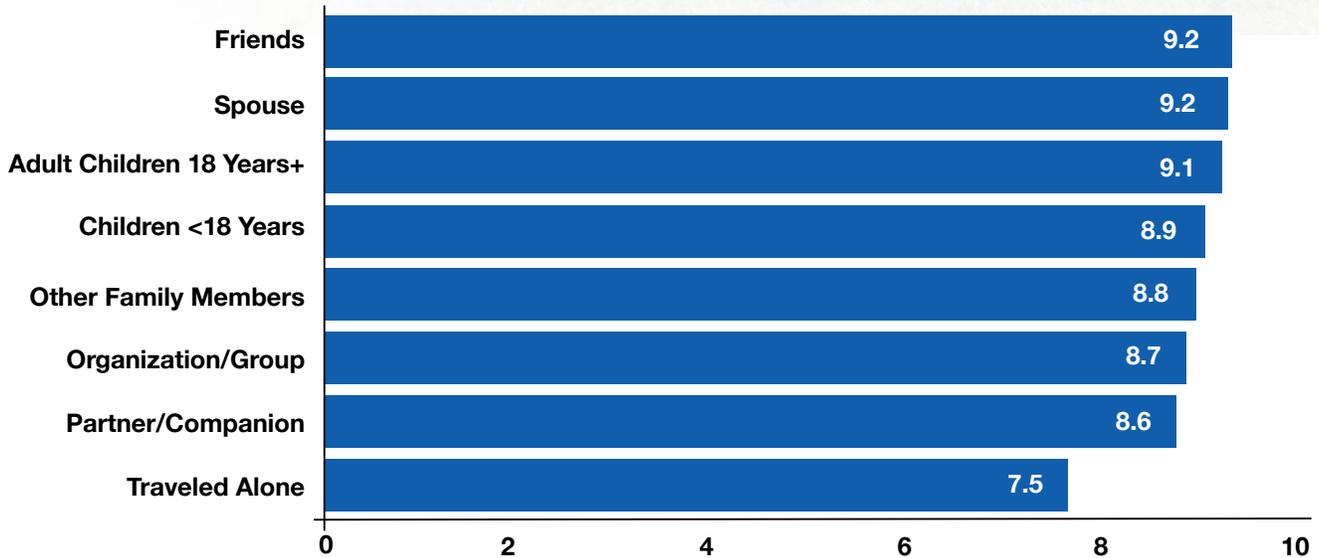
A large percentage of cruisers hail from Florida (17%), but California (11%), Texas (9%) and New York (6%) are also big players in the marketplace. To a lesser extent so are Georgia (4%) and North Carolina, New Jersey, Pennsylvania, Ohio and Illinois (all 3%).

# CRUISING WITH FRIENDS

Cruises are best when experienced in groups. Cruisers express high levels of satisfaction when they travel with others. From organized groups to friends, family, children, partners and spouses, cruises are just more fun in groups than when traveling alone. That's why last year marked the Year of FriendSHIP for cruisers, who truly enjoy traveling with others.

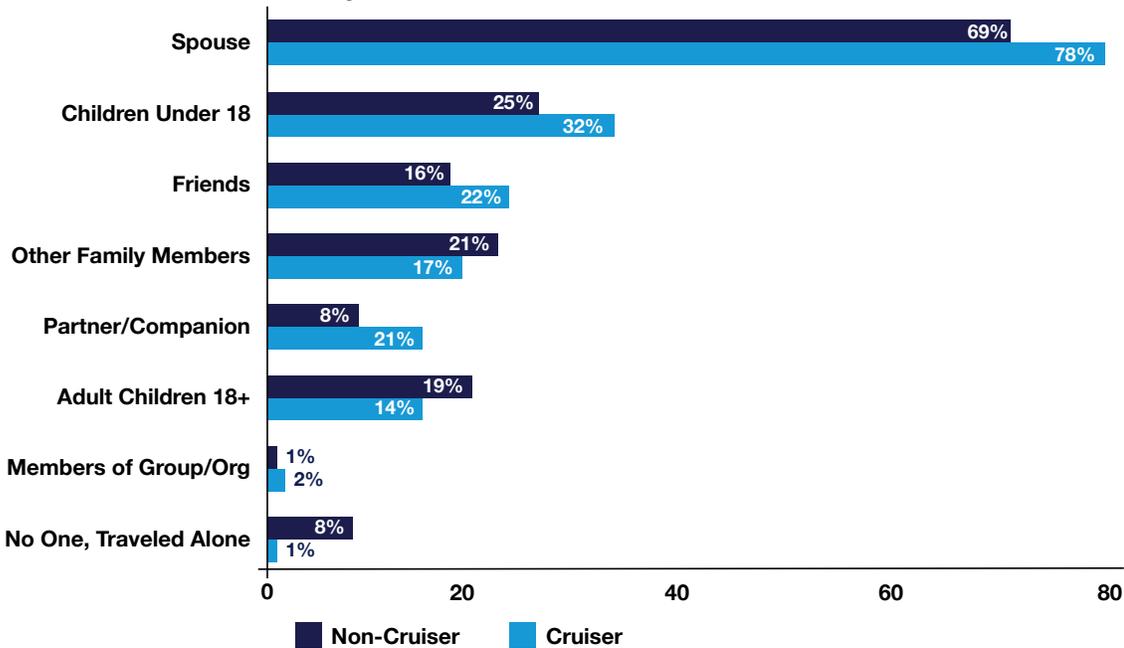


Figure 1:1 Ocean Cruise Satisfaction and Companionship



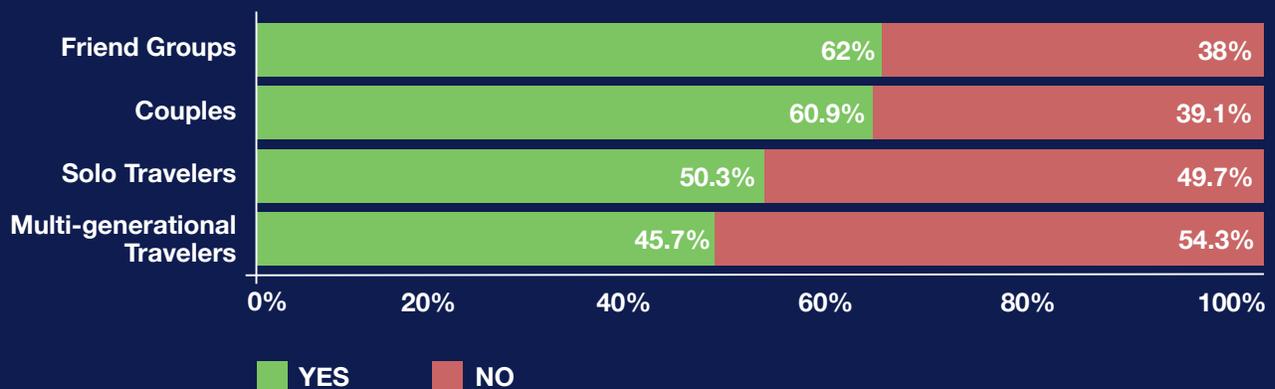
Cruisers are more likely than non-cruisers to bring along spouses (+9%), partners (+6%), children under 18 (+7%) and friends (+6%). More than three quarters (78%) of cruisers travel with their spouse, nearly one third (32%) travel with their children and almost a quarter (22%) with friends.

Figure 1:2 Who Do Vacationers Travel With?



Research from CLIA's Travel Agent Cruise Outlook suggests adventure travel may have a hand to play in the fun friends and family have together on cruises. Agents report seeing increases in adventure travel requests from 62% of friend groups and 61% of couples.

Figure 1:3 Increase in Adventure Travel Requests by Client Type





## DESTINATION SNACKING

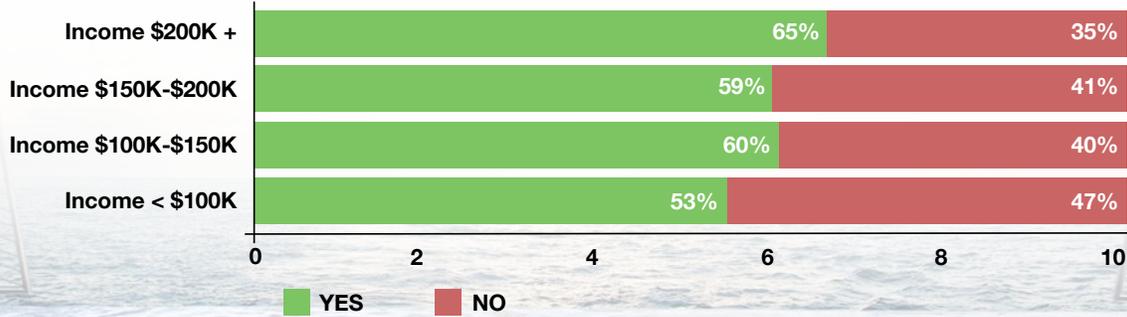
Cruisers use their trips as unique ways to experience and discover new destinations, with the younger generations showing even more interest than the older ones. Once cruisers visit a destination on a cruise, there's a high likelihood they'll return, regardless of income bracket. Experience-seeking Millennials are especially likely to see cruising as a way to sample destinations for a later return or even for extending a vacation at a port city after the cruise is over.

Ninety percent of cruisers say they consider their trips to be a good way to sample destinations for non-cruise vacations, and 57% say they have returned to a place they visited via cruise, with a high 72% in the Millennial cohort. Gen X is the least likely to return, yet 52% of them do.



Income does impact whether or not a cruiser will return to a destination. About half of cruisers who make less than \$100K (53%) return, versus 60% of cruisers who make \$100K-\$150K, 59% of cruisers who make \$150K-\$200K and 65% of cruisers who make more than \$200K.

Figure 2:1 Likelihood for Cruisers to Return to a Previously Visited Destination by Income Range



More than half (57%) of cruisers extend their vacations in port cities, with a high 68% in the Millennial group who stay after their trips are over. Just over half of the older generations extend their stay, with 53% of GenXers and Boomers and 56% of traditionalists remaining in port cities for a few extra days.

Figure 2:2 Is Cruising a Good Way to Sample Destination by Generation

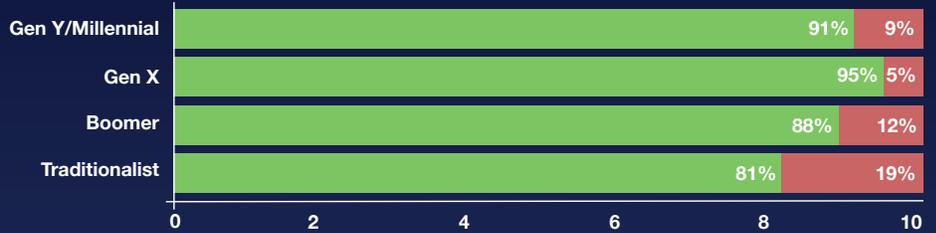


Figure 2:3 Returning to a Destination Visited on a Cruise By Generation

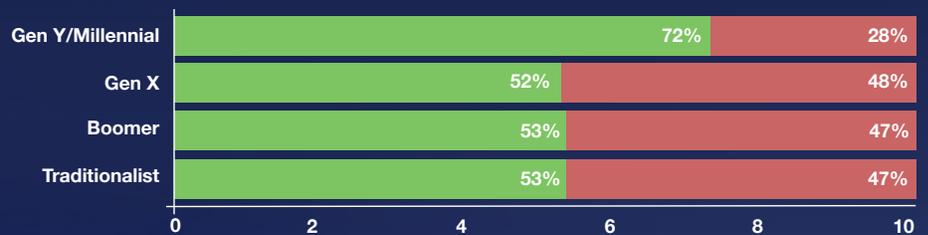
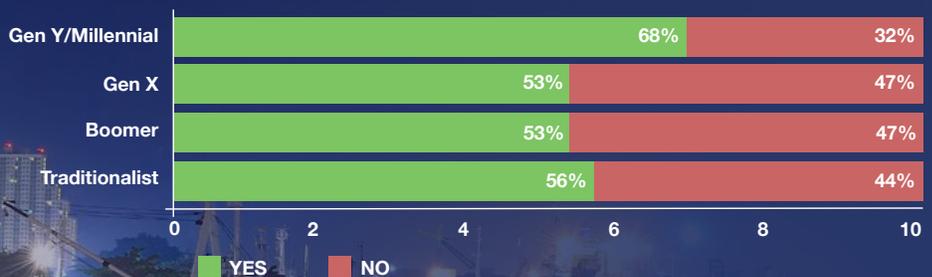


Figure 2:4 Extending Cruise Vacation in Port City by Generation



# CRUISING ACROSS INCOMES

There is a cruise for everyone, regardless of income. Though cruises are favored most (75%) by travelers making between \$150K-\$200K, 66% of those making less than \$100K say cruises are the better vacation type, as did 70% of those making more than \$200K. Income is no barrier within the cruising vacation marketplace.

Figure 3:1 Cruising versus a Land Vacation by Income Range

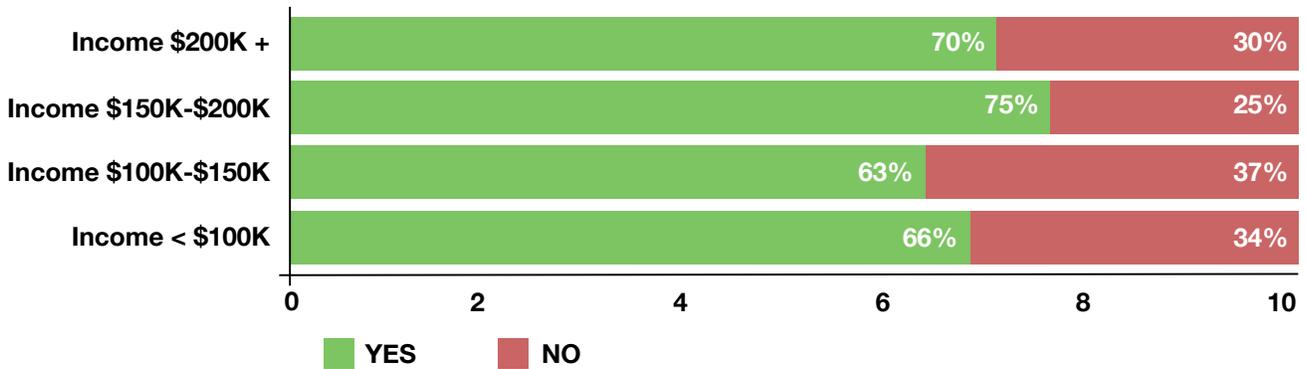
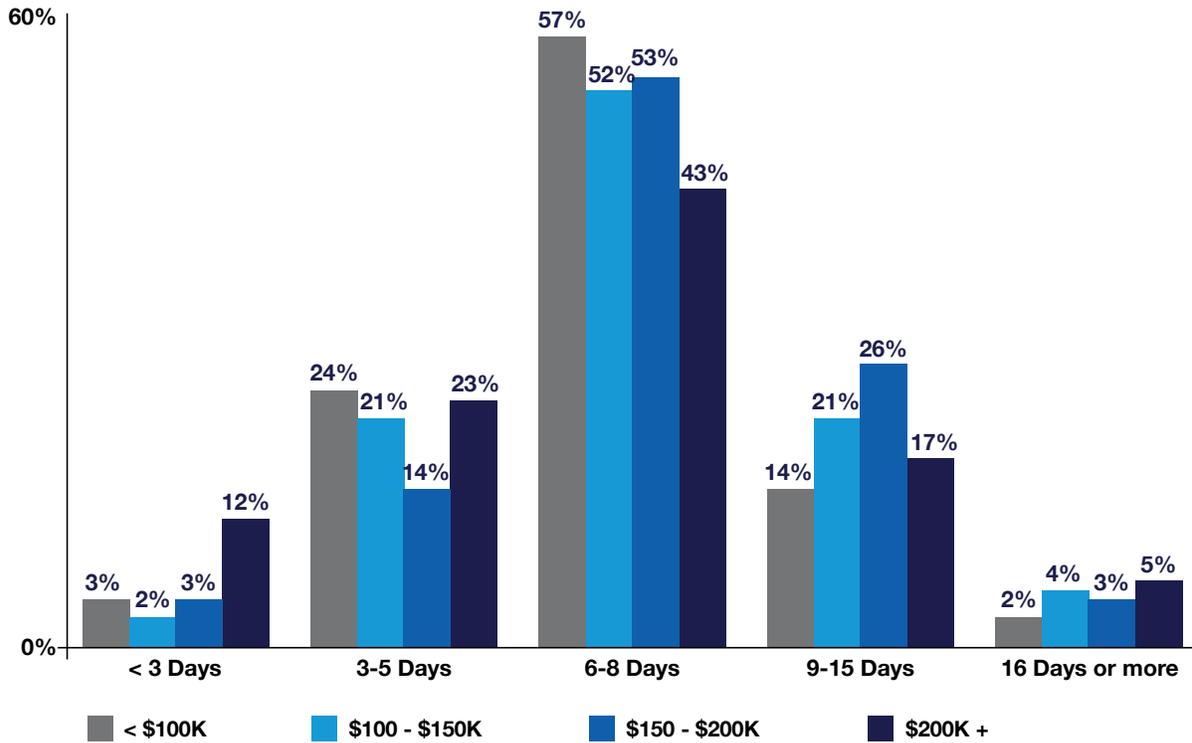


Figure 3:2 Last Cruise Duration Based on Income Range



While higher incomes favor longer cruises at a greater rate, the six- to eight-day itinerary is by far the most popular across incomes in terms of a traveler’s last cruise, from 57% of those making less than \$100K to 43% of those making more than \$200K. High income travelers are the most likely for their last cruise to be a short, three-day excursion (12%) and a long, 16-plus-day experience (5%).

Between these are the three- to five-day and nine- to 15-day cruises, which garnered in and around 20% each of the last-cruise marketplace. Of those making less than \$100K, 24% report their last cruise was three- to five-days and 14% say it was nine- to 15-days. Oppositely, of those making \$200K, 14% say it was a three-to-five day excursion and 26% say it was nine- to 15-days.

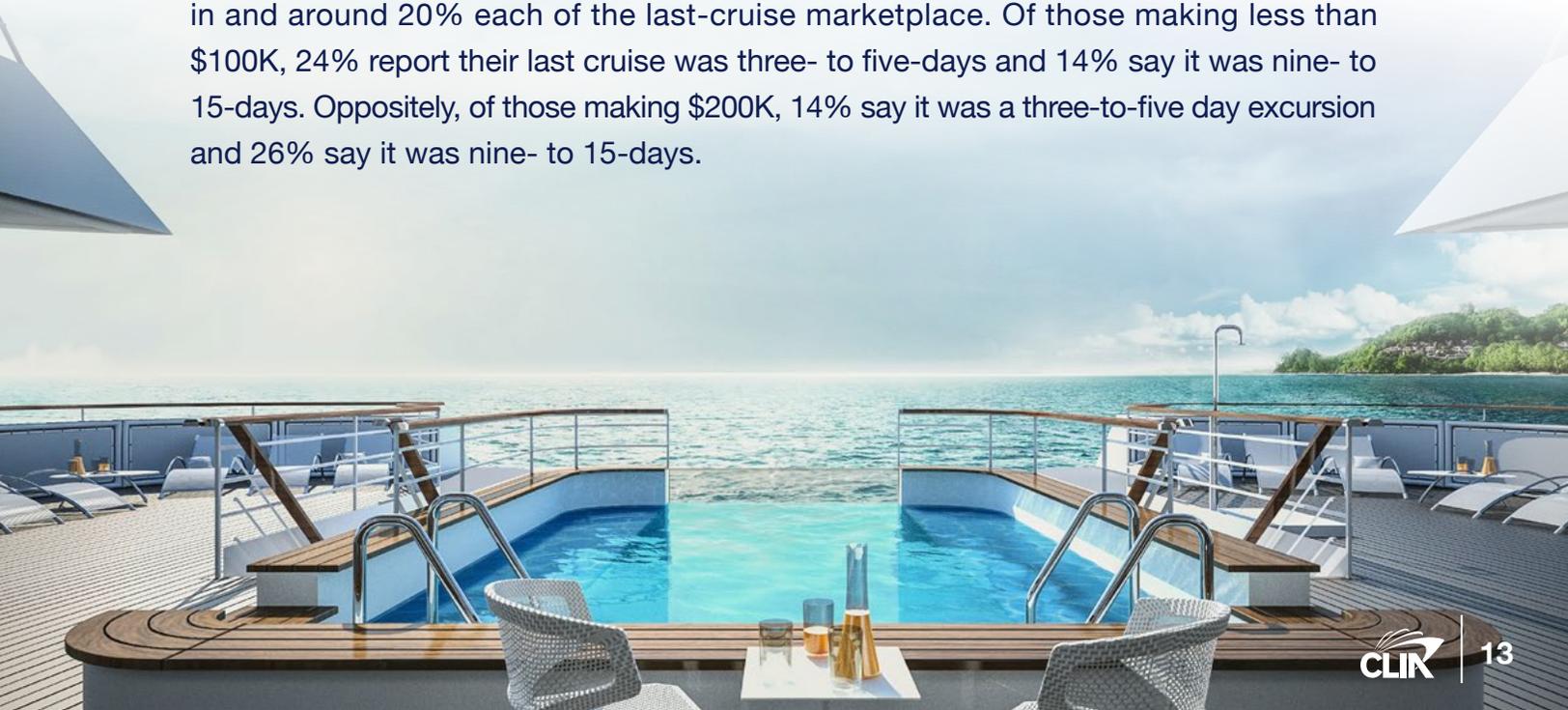
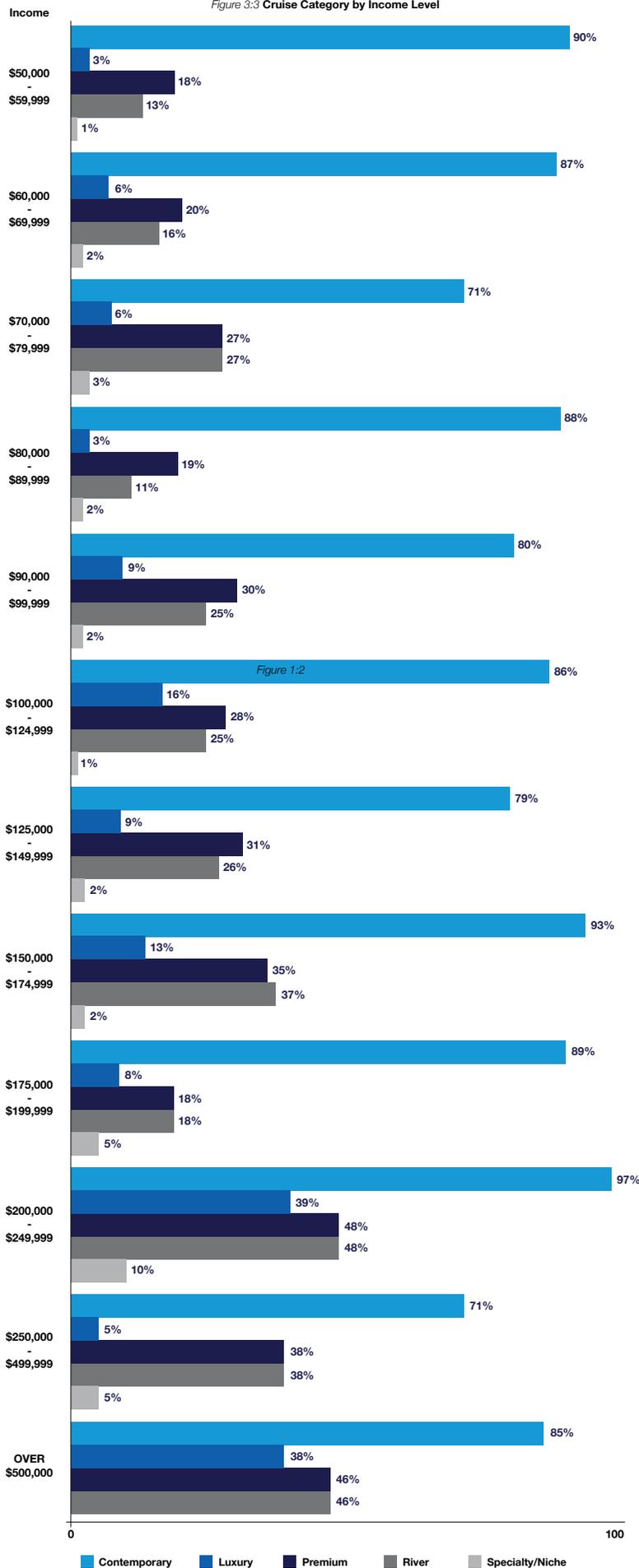


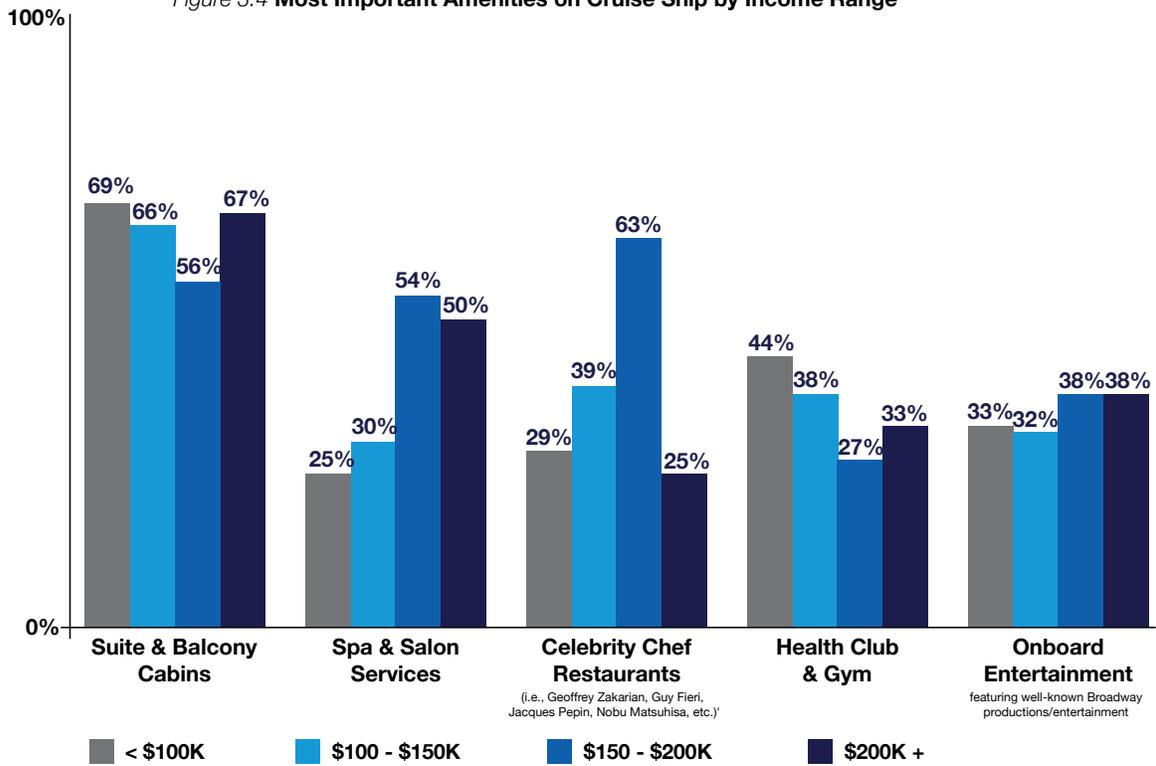
Figure 3:3 Cruise Category by Income Level



Cruise category also varies by income in some areas, but contemporary cruises are the most popular regardless of income bracket. Not surprisingly, higher-income cruisers are more likely to sail on **premium** and **luxury liners**, as well as take **river cruises**.

Suites and balconies are the most important amenity for all cruisers, though spas and salons are more essential for higher-income travelers, while health clubs and gyms are more important for those with lower-incomes. Celebrity chefs more than double in importance for those in the \$150k-\$200k group (63%) over their peers in the highest and lowest incomes—remarkably coming in as more important than the suite and balcony (56%).

Figure 3:4 Most Important Amenities on Cruise Ship by Income Range



Overall, satisfaction with the cruise experience is high across all incomes for an average of 9.0/10, and 85% to 87% of cruisers will “very likely” book a cruise for their next vacation and satisfaction is very high.

Figure 3:5 Satisfaction Level Based on Income Range

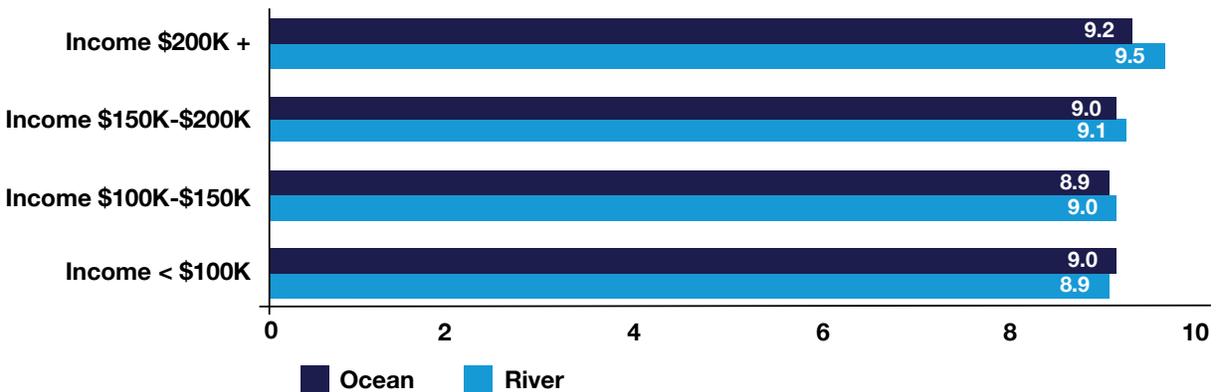
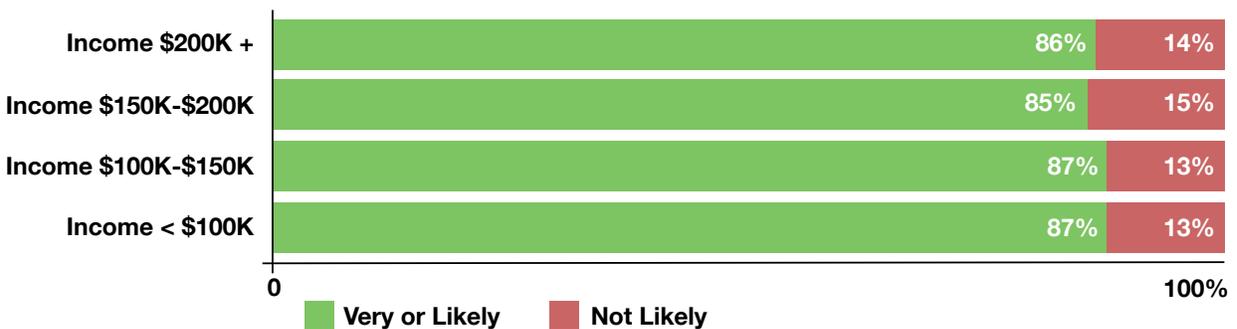


Figure 3:6 Likelihood of Booking a Cruise as Next Vacation by Income Range





## KIDS ARE JUST THE HOOK

Cruisers often book for one reason, but then discover they enjoy other activities instead. Due to the high level of options on cruise ships, cruisers are using different amenities than the ones they indicated they wanted. There is just so much to do.

Many cruisers say that child-based services are reasons to book, including programs for children under 13 (44%) and between 13-17 (37%), as well as babysitting (42%). But the actual use of these programs is far less. Only 13% of cruisers say they scheduled programs for their children under 13 (-31%) and only 9% say the same for the 13-17 age group (-28%). The actual request for babysitting comes from just 6% of cruisers, a drop of 36% of those who say they want it.

Suites and cabins (-12%), celebrity chef restaurants (-12%) and private island access (-13%) are all less popular onboard than they are before the actual cruise.

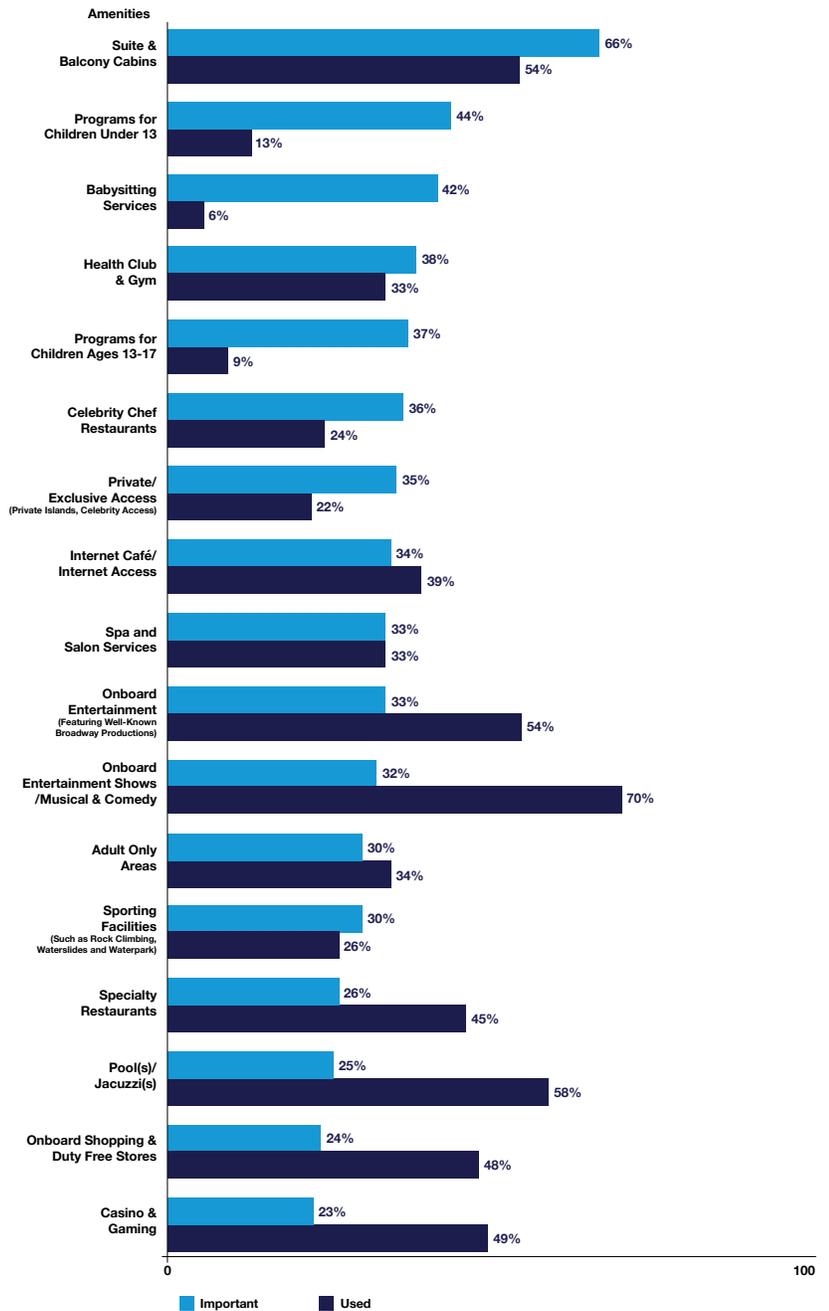
Meanwhile, several services and activities are surprisingly popular. Only 23% of cruisers say that they want casinos and gambling, 24% onboard shopping and duty-free, 25% pools and Jacuzzis, 26% specialty restaurants, 32% onboard entertainment and 33% celebrity/well-known entertainment.

But 70% of cruisers actually attend shows, musical & comedy acts —about double those who express an interest ). Indeed, onboard entertainment is the most used feature on cruises, overall.

Other amenities are more popular than expected, as well. Nearly half of cruisers (49%) say they have utilized the onboard casino/gambling (+26% over desire), 48% shop onboard (+24%), 58% swim or relax in pools and Jacuzzis (+33%) and 45% eat at specialty dining (+19%).



Figure 4:1 Cruise Ship Features, Importance Versus Used

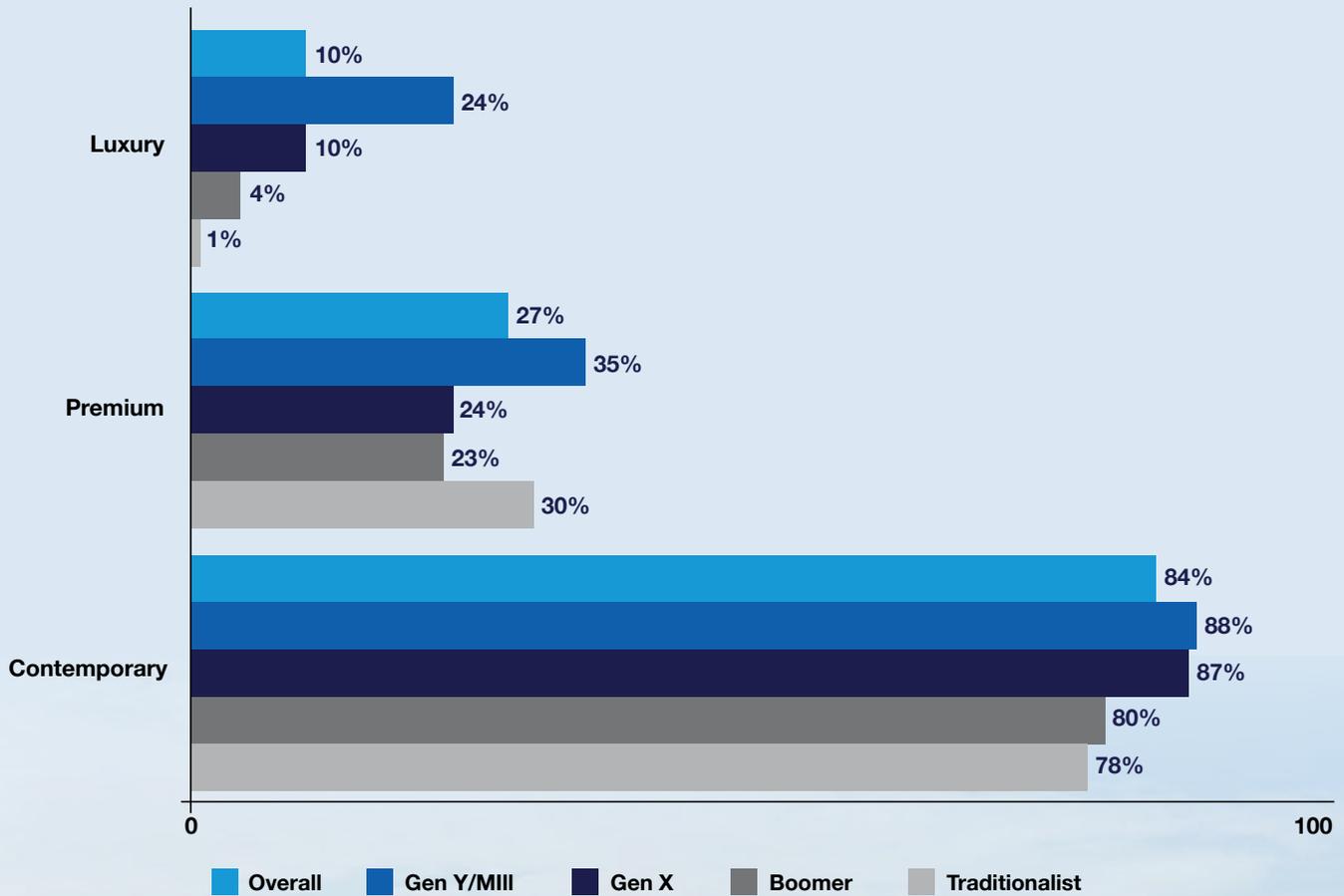


# MILLENNIALS RAISE THE SAILS

Millennials love to travel in luxury; 24% of them have traveled on a luxury line in the last three years versus of an overall average for that class of 10%. Millennials also represent a higher share of the premium market.

Regardless, contemporary cruises are the most popular option (88%), premium (35%) and luxury (10%).

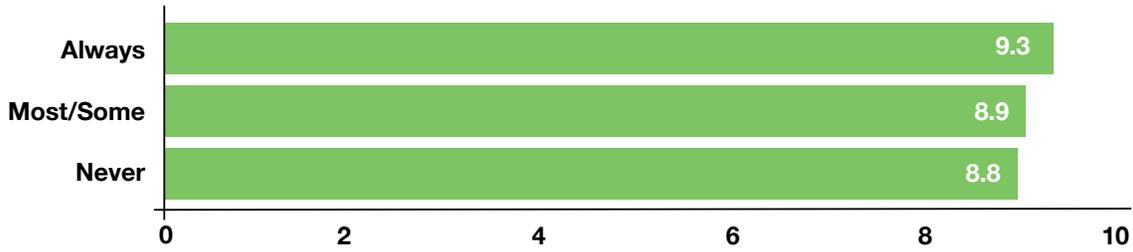
Figure 5:1 Most and Least Used Cruise Class by Generation



# AGENTS PROPEL CRUISERS

Travel agents play a key role in ensuring great cruise experiences. When a travel agent always plans the travel, ocean cruisers report a satisfaction rate of 9.29/10 versus a satisfaction of 8.85/10 if they never use professional assistance.

Figure 6:1 Satisfaction Level Based on Travel Agent Usage



Additionally, those who use a travel agent are more likely to cruise again than those who do not. Cruisers who always use an agent are 97% “very likely or likely” to book another cruise, versus 85% of those who never use agents. Moreover, when looking at the 97% of cruisers who use a travel agent, 81% of those cruises chose ‘very likely’, more than two times that of travelers who do not use a travel agent.

Figure 6:2 Likelihood to Book a Cruise as Next Vacation Based on Travel Agent Usage

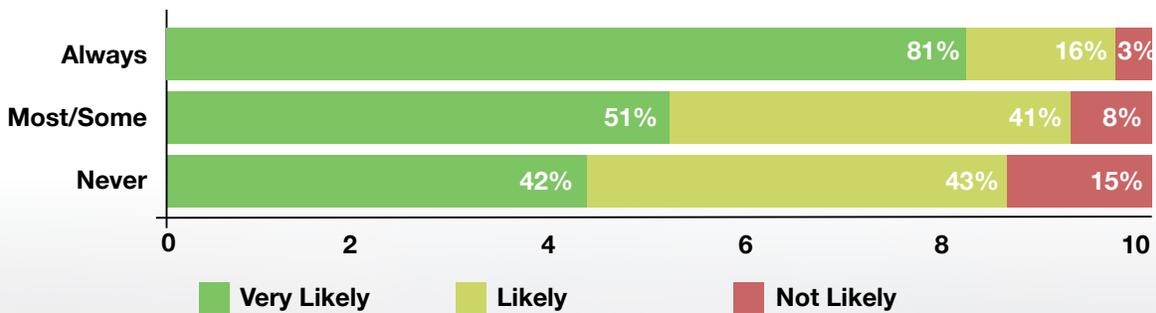
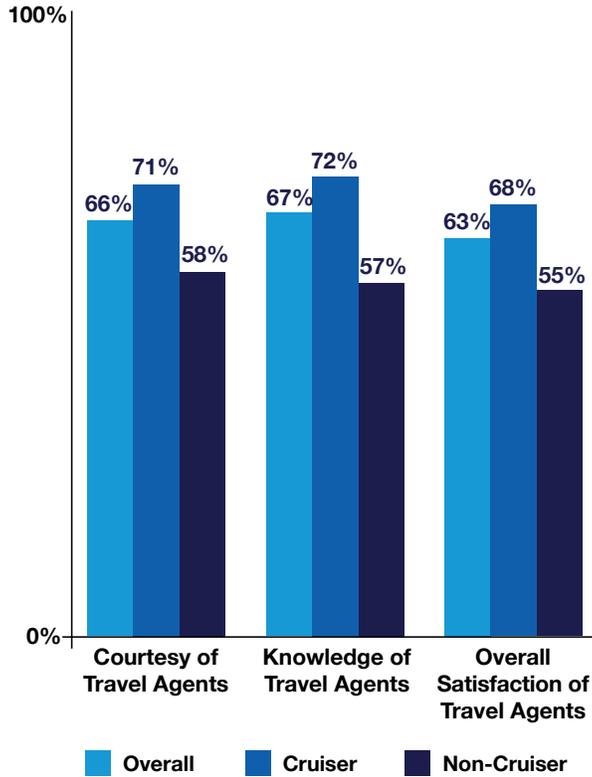


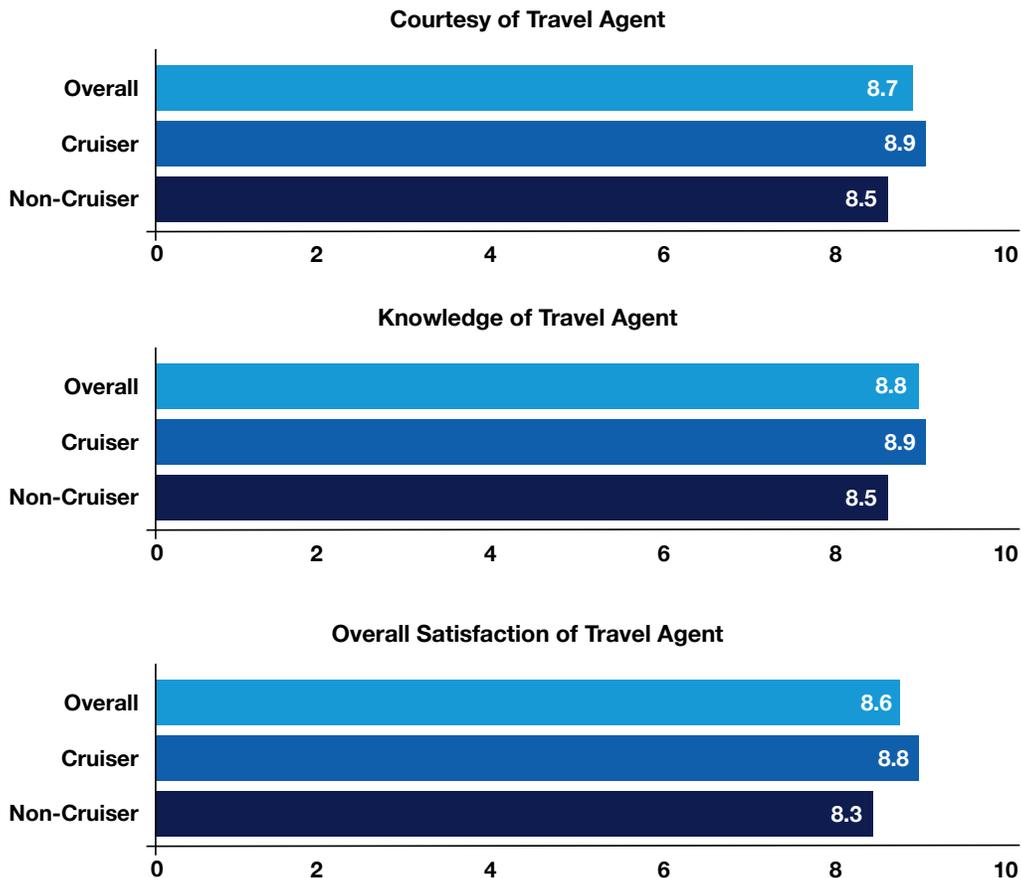
Figure 6:3 Satisfaction with Travel Agents Interaction  
 (% indicates those rating satisfaction a 9 or 10 on a 10-point scale.)



Cruisers are more satisfied with their travel agents than non-cruisers. They say they are very satisfied with agents' courtesy (71% cruisers/58% non-cruisers) and knowledge (72% cruisers/57% non-cruisers).

Cruisers rate their overall satisfaction with travel agents 8.75/10, and 68% say they are "very satisfied" with the experience, compared with 8.34/10 and 55% for non-cruisers.

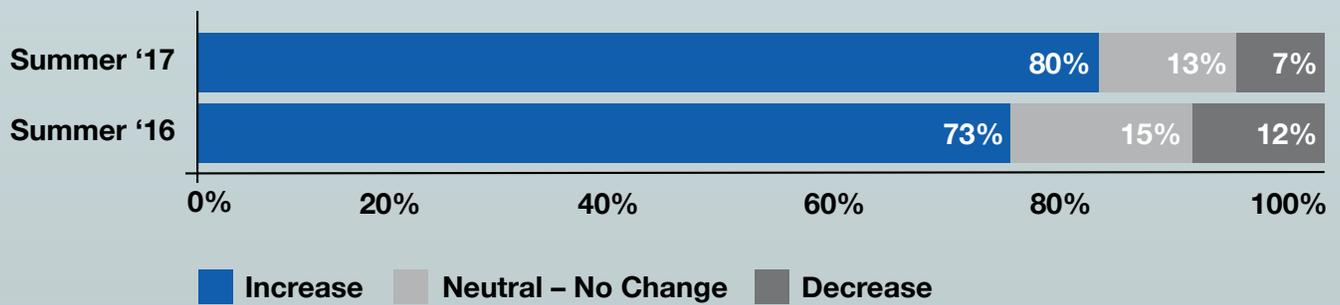
Figure 6:4 Trip Planning with Travel Agent: Courtesy, Knowledge and Satisfaction Levels



Cruisers like to use travel agents far more than non-cruisers, in general. Thirty-seven percent of cruisers say they “always” or “most of the time” use agents, compared with just 12% of non-cruisers. Non cruisers are twice as likely not to use a Travel agent as only 34% of cruisers say they will “never” utilize a travel agent versus 68% of their land-based peers.

These trends explain why travel agents report such good business trends in CLIA’s Travel Agent Cruise Outlook. In that research, a super majority (81%) of travel agents say their cruise-based sales volume is up compared to 73% in 2016.

Figure 6:5 Travel Agent Cruise Sale Volume Outlook



# CRUISE “STATES”

Ten states represent 62% of cruise travelers from the U.S., a total 11.5M passengers in 2016. The highest number of cruisers hail from Florida (17%), followed by California (11%), Texas (9%), New York (6%) and Georgia (4%). North Carolina, New Jersey, Pennsylvania, Ohio and Illinois round out the Top 10 with 3% each.

But where are they going? From those Top 10 states, more than three quarters of cruisers are traveling to the Caribbean/Bahamas/Mexico—including Florida (86%), Georgia (88%) and North Carolina (88%)—except for California, which only sends 23% to that region. Instead, Californians are heading to the North American West coast (48%), Alaska (10%) and Australasia (10%).

Figure 7:1 Where are Cruise Passengers From?

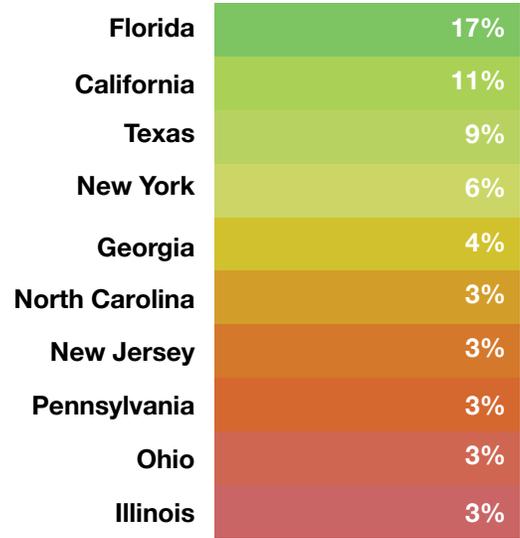
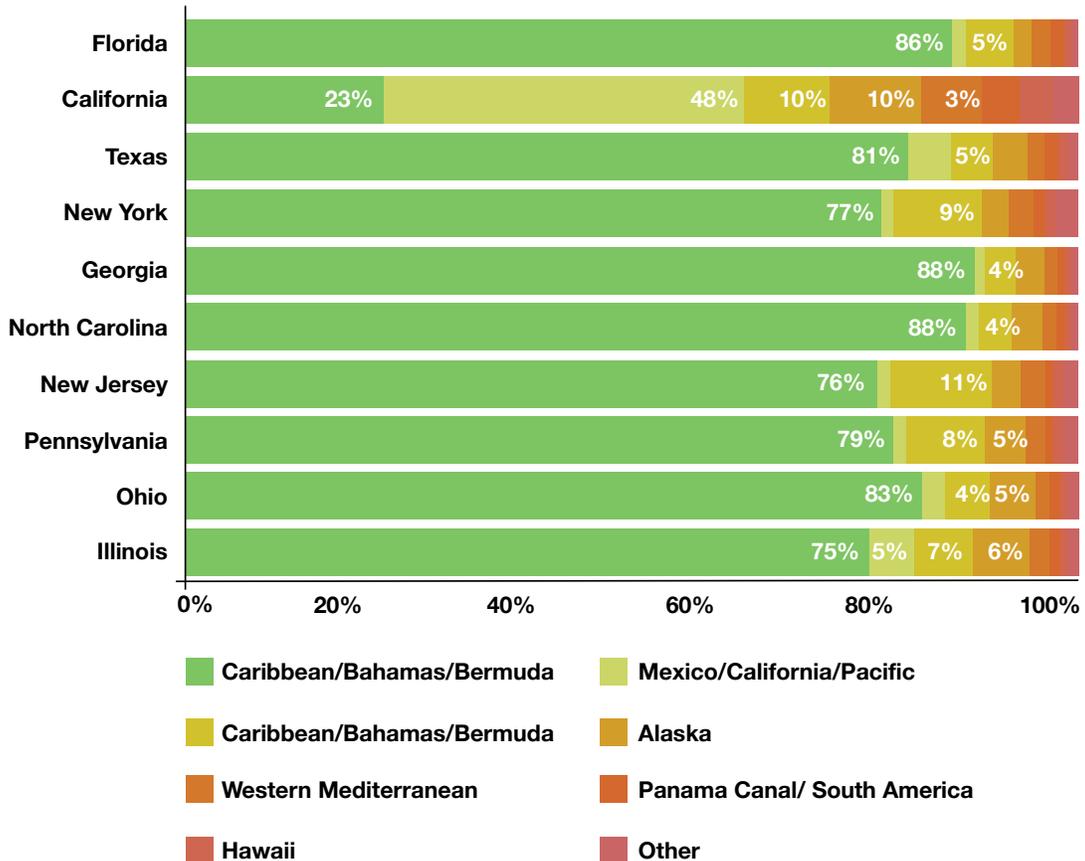


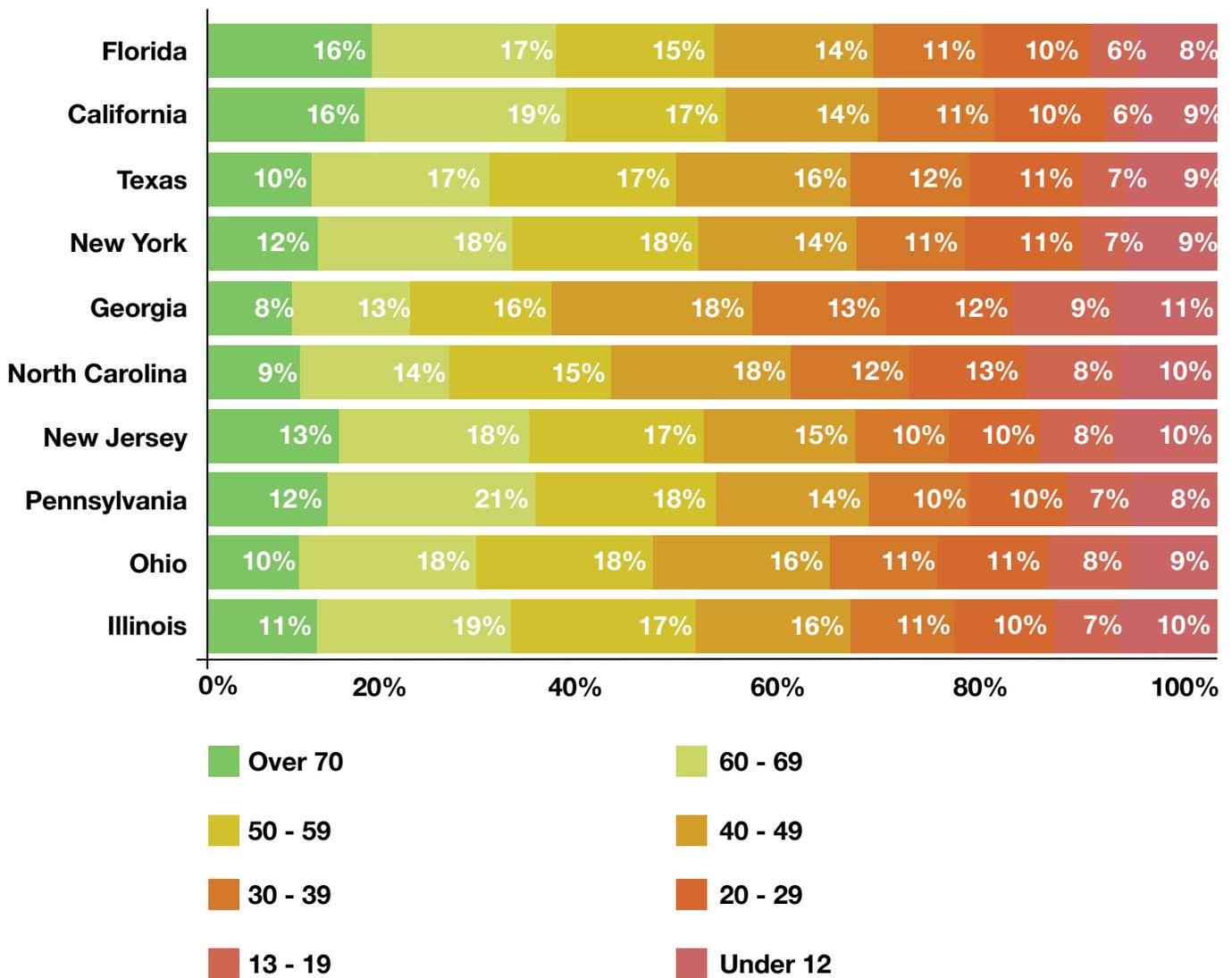
Figure 7:2 Where are Cruise Passengers Cruising to?



California isn't the only state cruising to Australasia; the region is seeing cruisers from New Jersey (11%), New York (9%), Pennsylvania (8%), Illinois (7%), Texas (5%), Florida (5%) and Ohio (4%). In addition to California, Alaska is also popular in Illinois (6%), Texas (5%) and Ohio and Pennsylvania (5%).

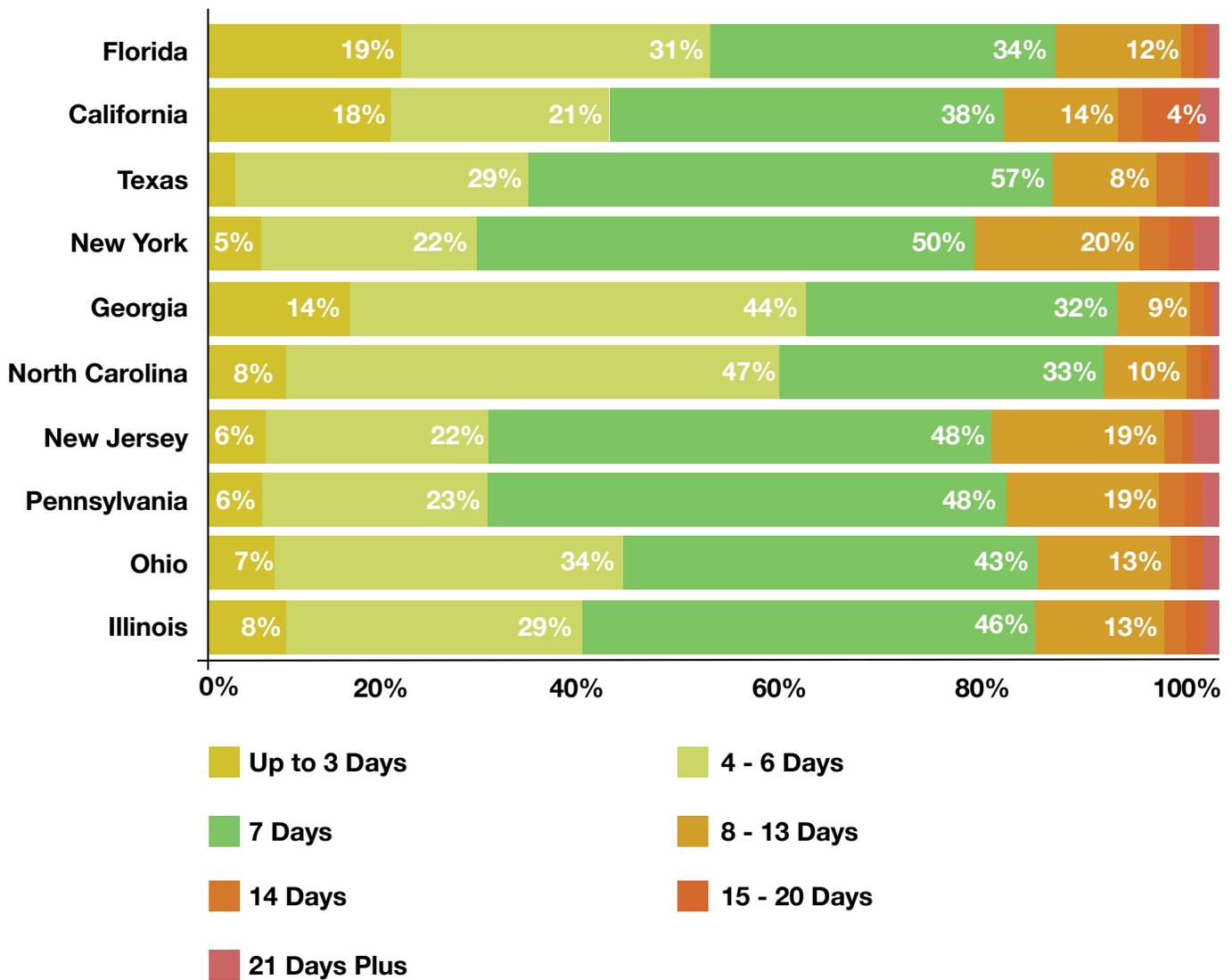
Cruisers under 40 make up one-third to a little under half of the U.S. marketplace, with Georgia (45%) and North Carolina (43%) leading the way. Pennsylvania and California have the most cruisers in the over-40 subset, with 66% each. However, the oldest cruisers hail from Florida, which has the largest percent of over-70s travelers (16%).

Figure 7:3 How Old Are The Cruisers By State?



Meanwhile, cruisers from Georgia and North Carolina are taking more cruises of up to six days than their peers (57% and 54%, respectively); while people from New York, New Jersey and Pennsylvania have higher percentages of people taking cruises of more than eight days.

Figure 7:4 How Long Are They Cruising For?



**BY**

**THE**

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**J.D. POWER**

# BY THE NUMBERS

Figure 1 Cruisers Vs. Non-Cruisers by Generation

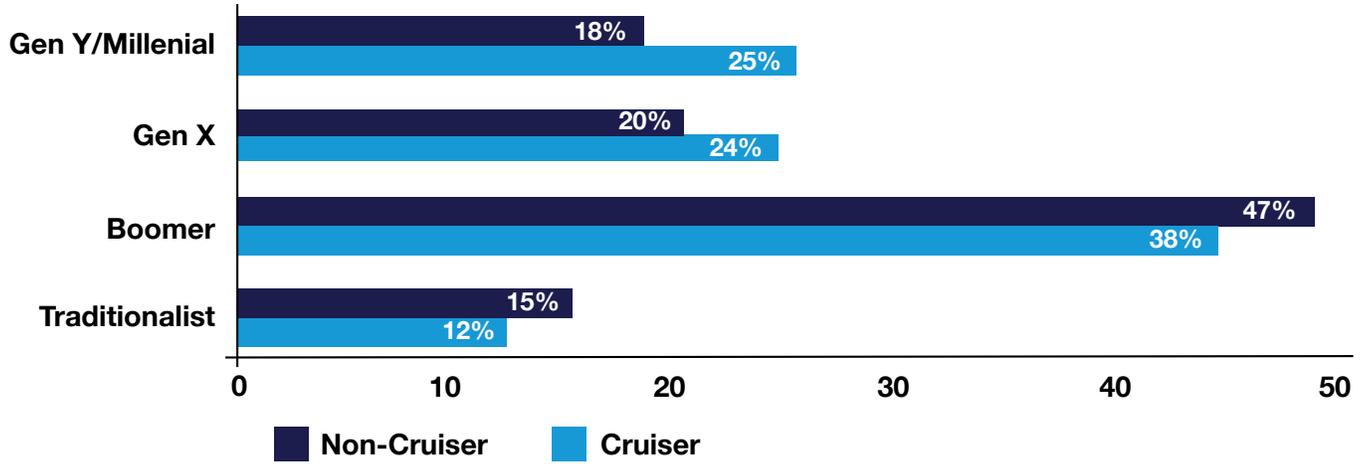
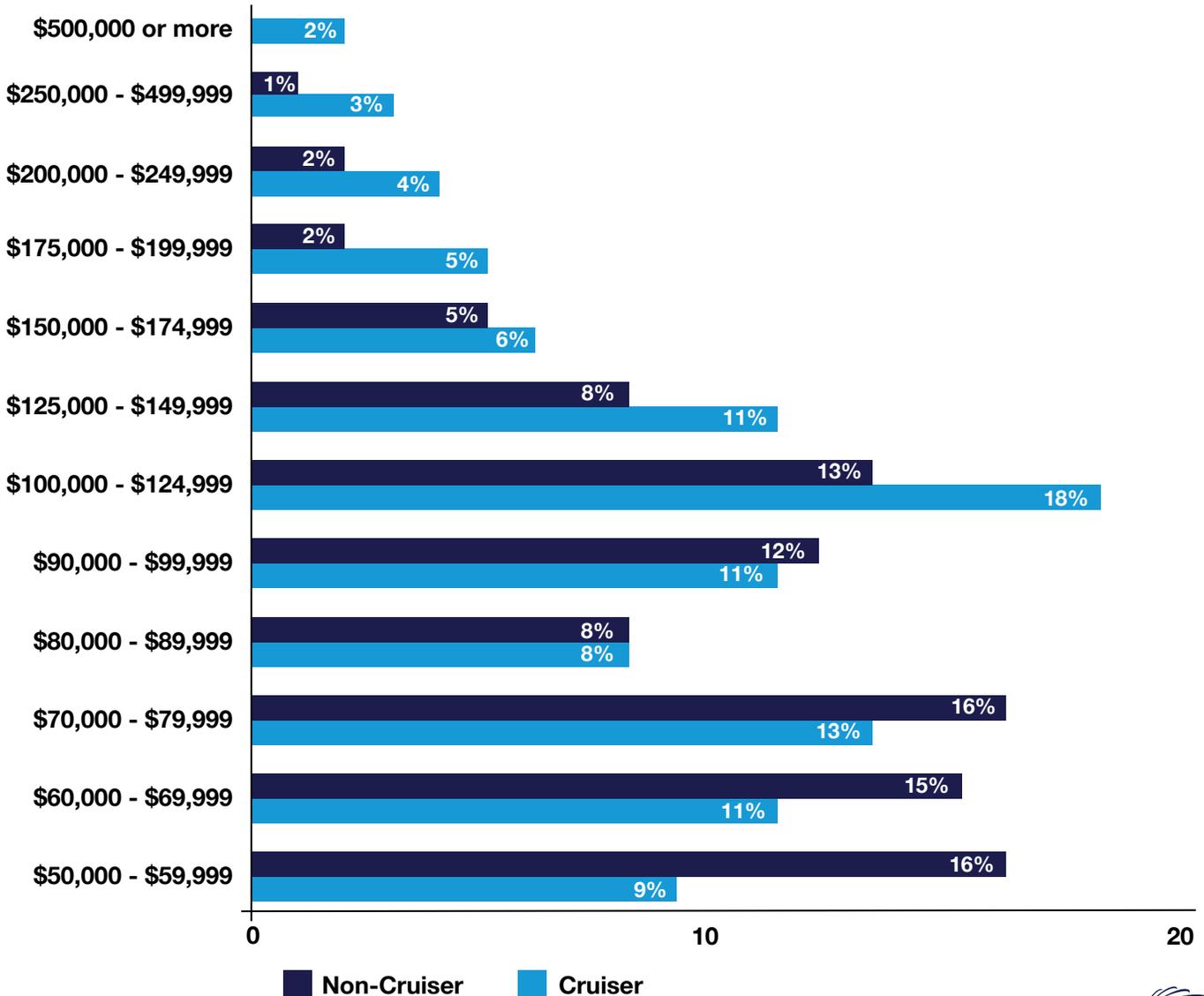


Figure 2 Cruisers Vs. Non-Cruisers by Income Range



# BY THE NUMBERS

Figure 3 Best Vacation Type Cruisers Vs. Non-Cruisers

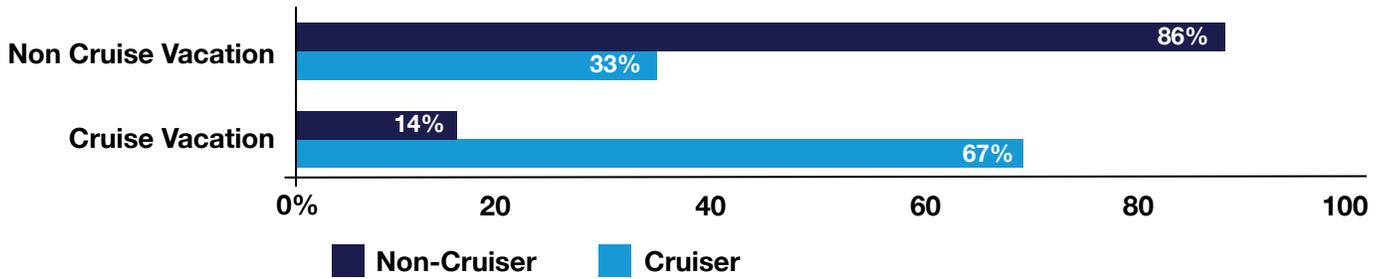
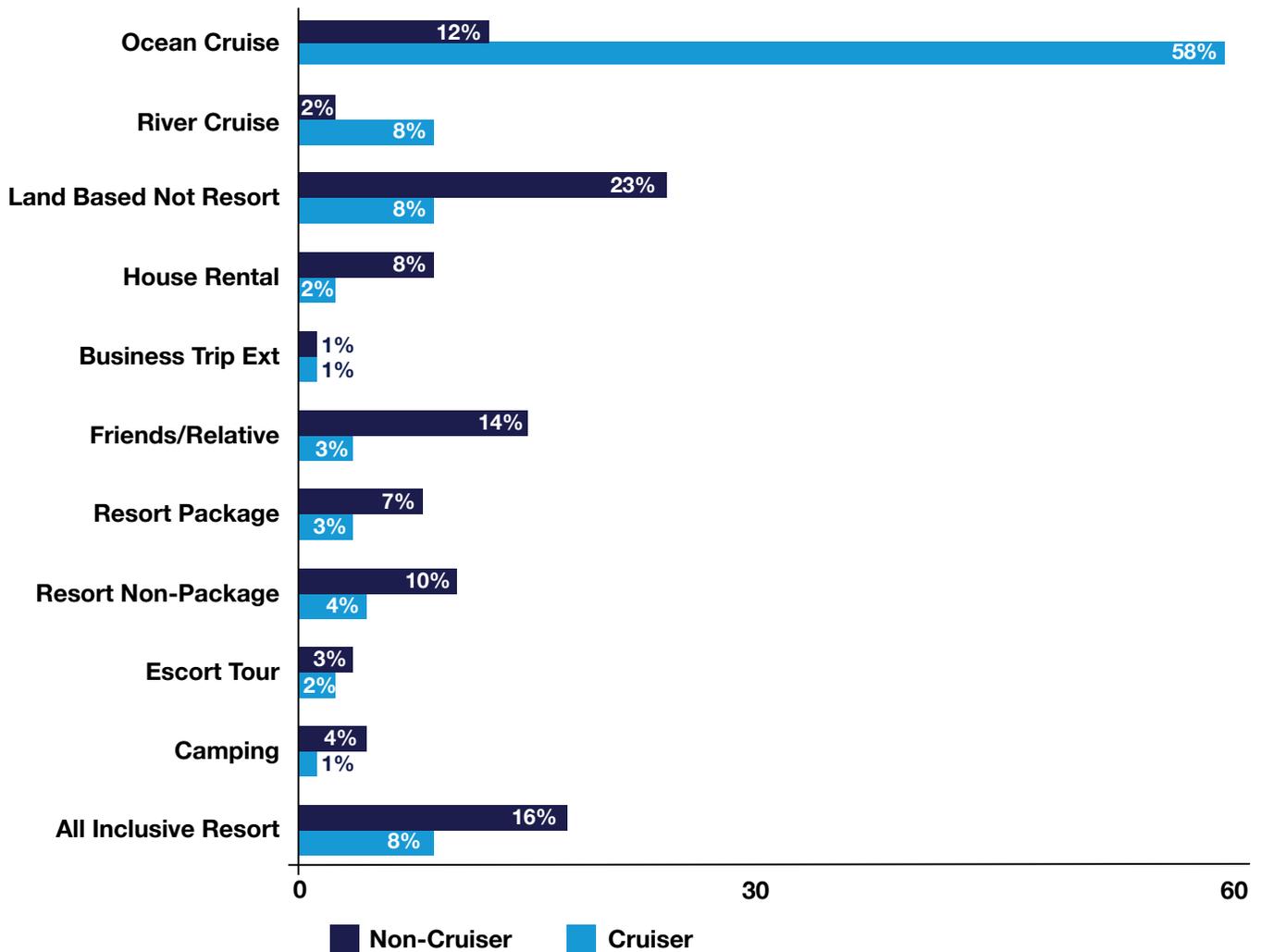


Figure 4 Favorite Vacation Type Cruisers Vs. Non-Cruisers



# BY THE NUMBERS

Figure 5 Favorite Types of Vacations Overall and by Age

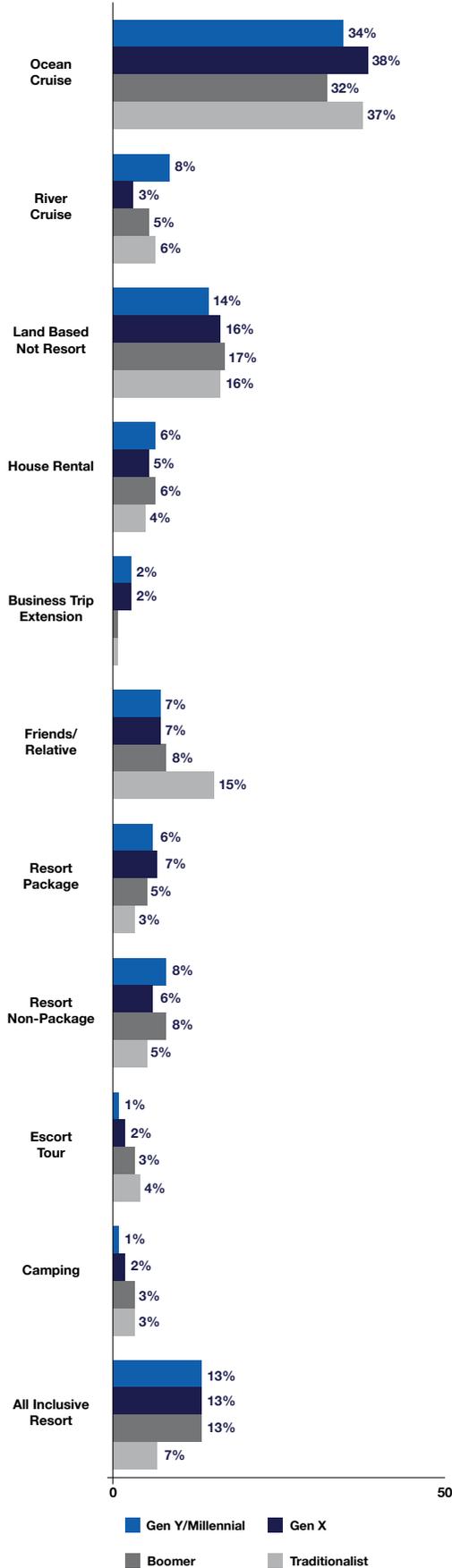


Figure 6 Best Overall Vacation by Age

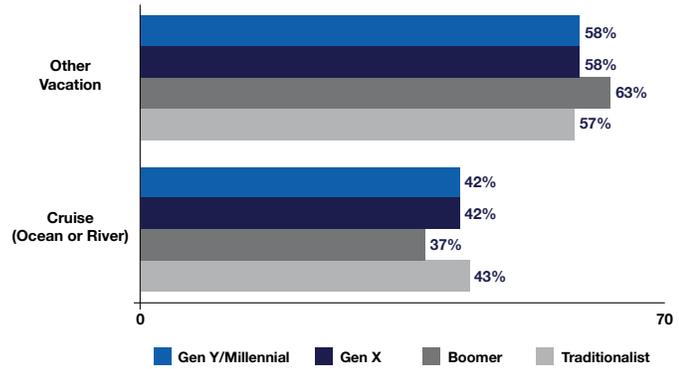
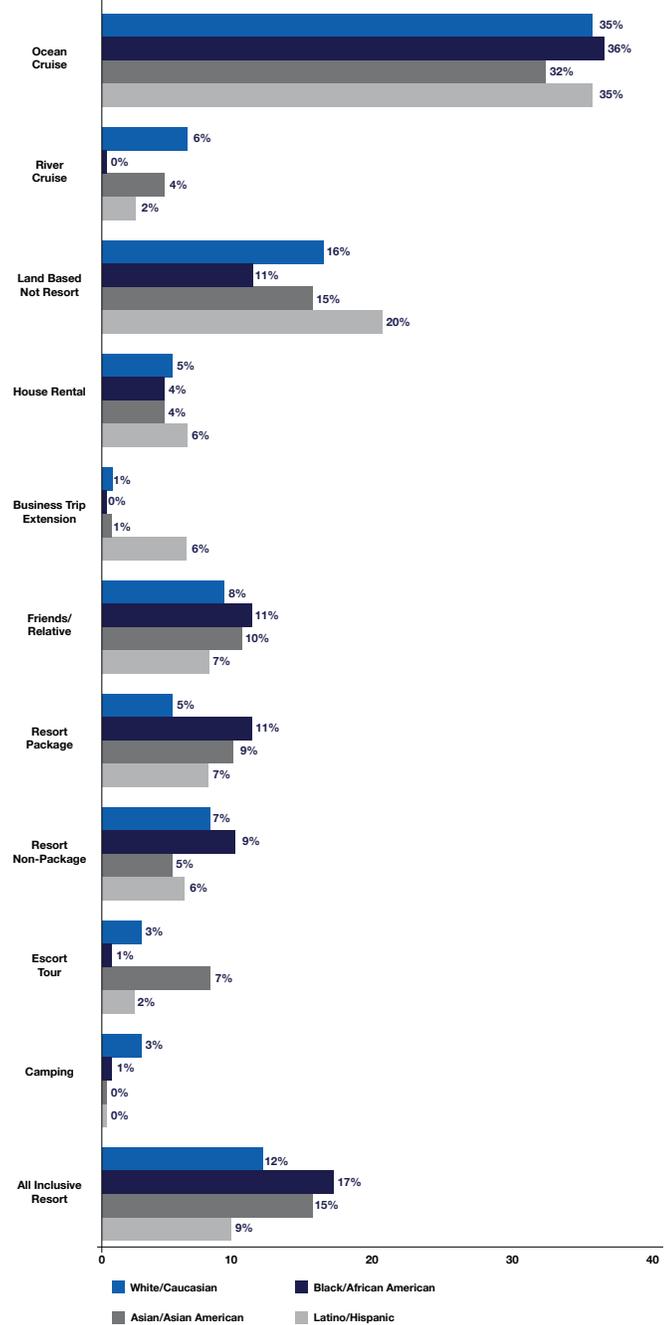


Figure 7 Best Overall Vacation Type by Ethnicity - Detail



# BY THE NUMBERS

Figure 8 Cruises Vs. Land. Best Overall Vacation Type by Ethnicity

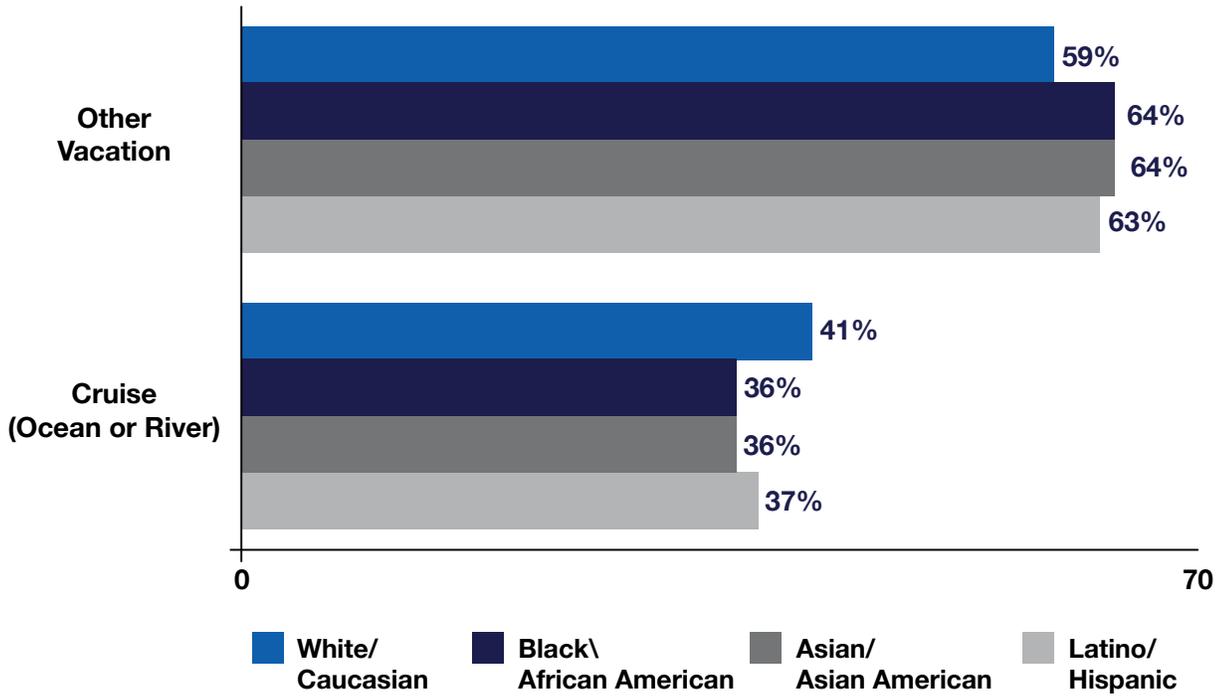
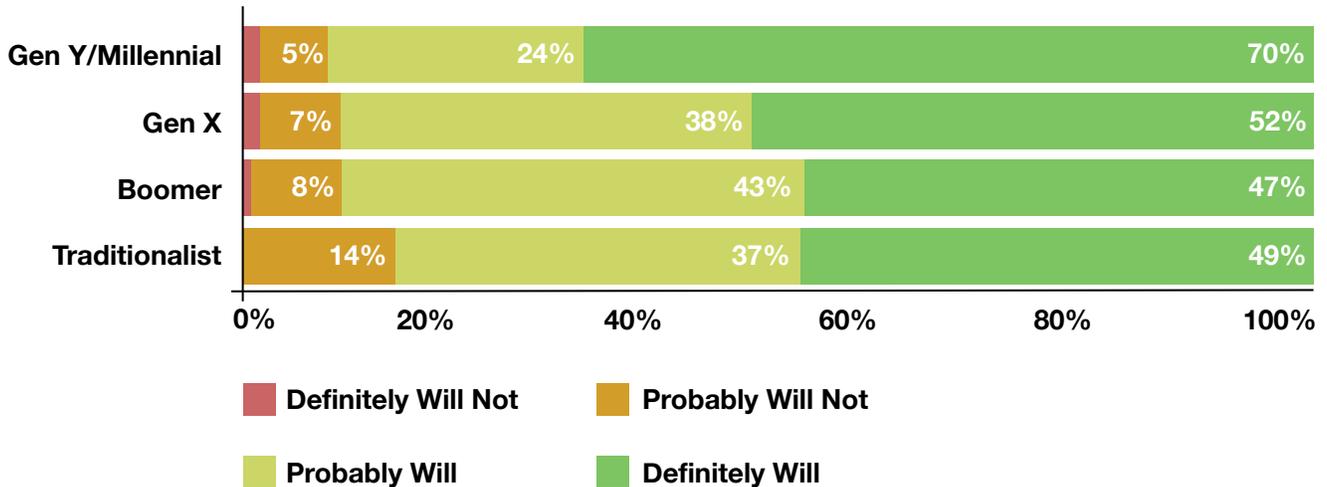


Figure 9 Likelihood of Booking a Cruise for Next Vacation Per Generation



# BY THE NUMBERS

Figure 10 Likelihood of Booking a Cruise for Next Vacation by Ethnicity

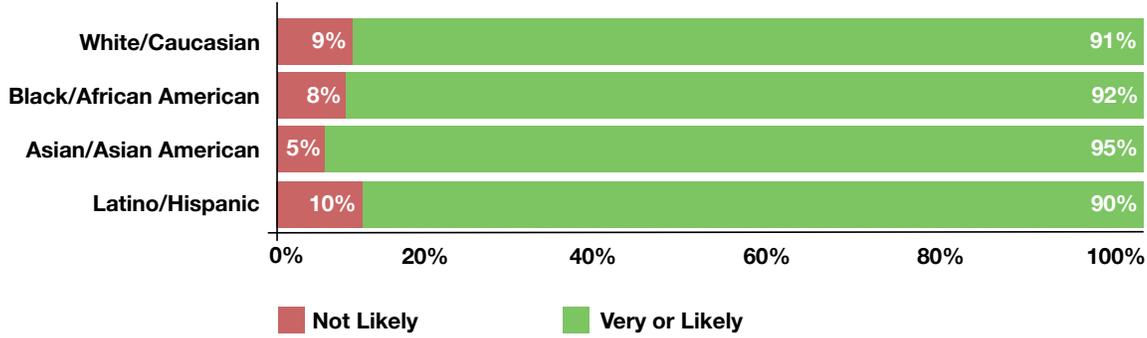
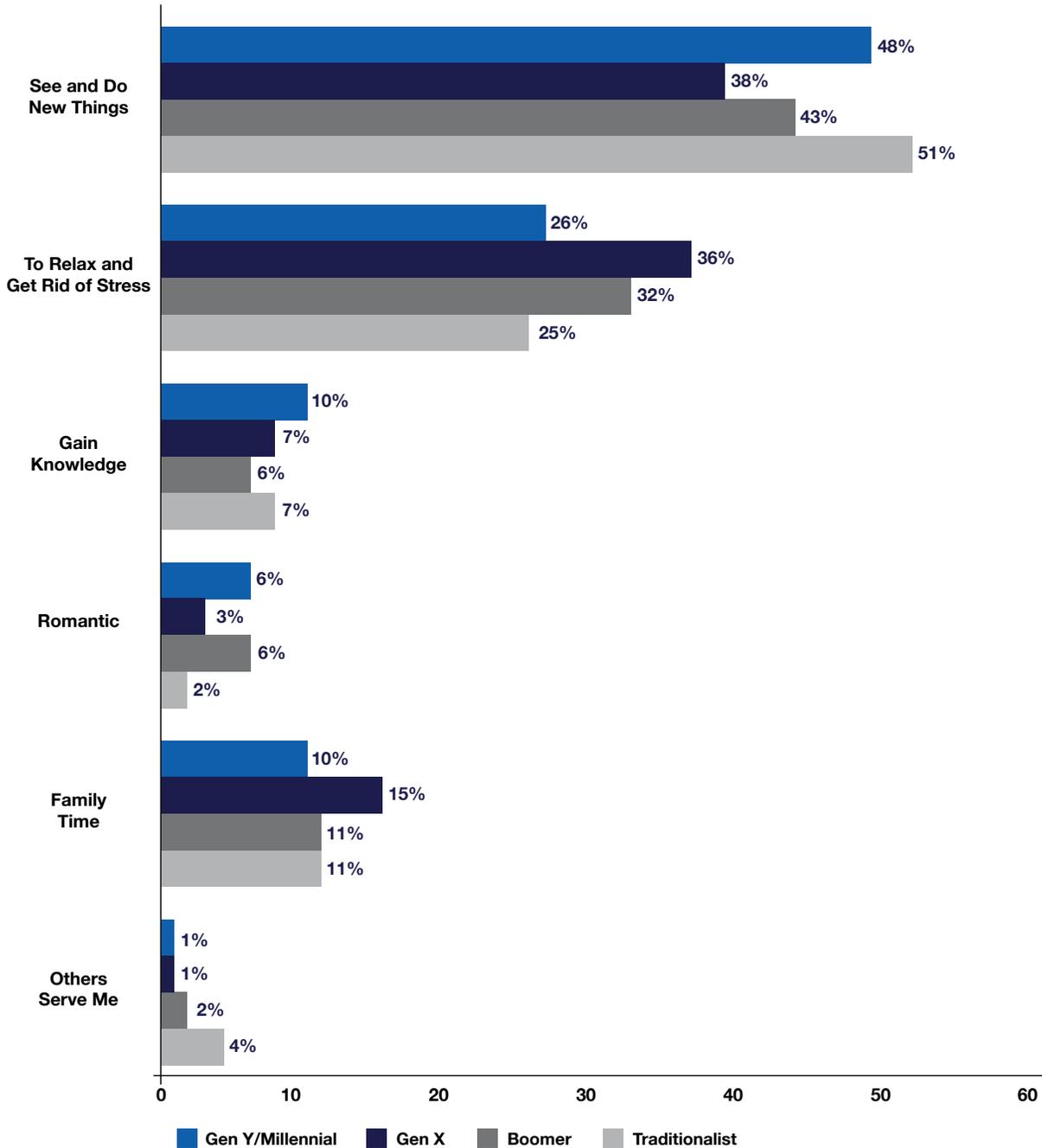
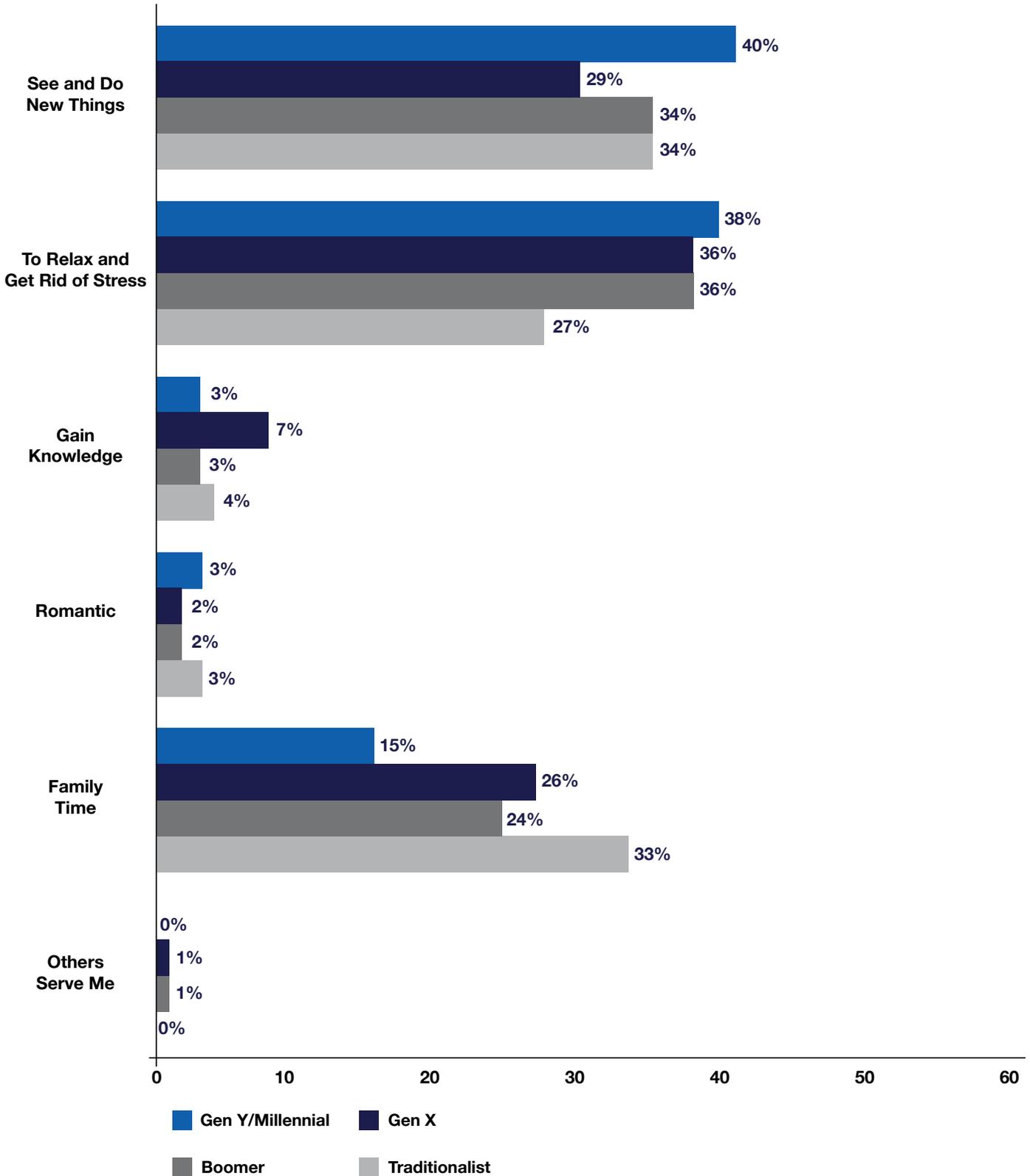


Figure 11 Cruisers: Reasons to Take a Vacation by Generation



# BY THE NUMBERS

Figure 12 Non-Cruisers: Reasons to Take a Vacation by Generation



# BY THE NUMBERS

Figure 13 Cruisers: Reasons to Take a Vacation by Gender

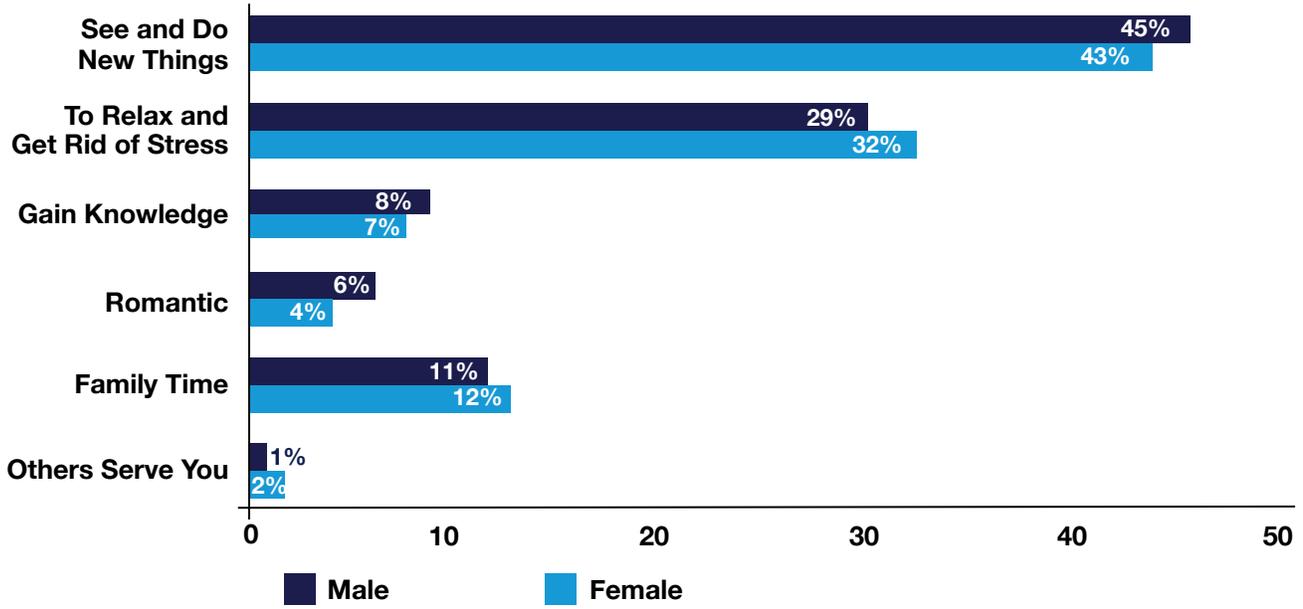
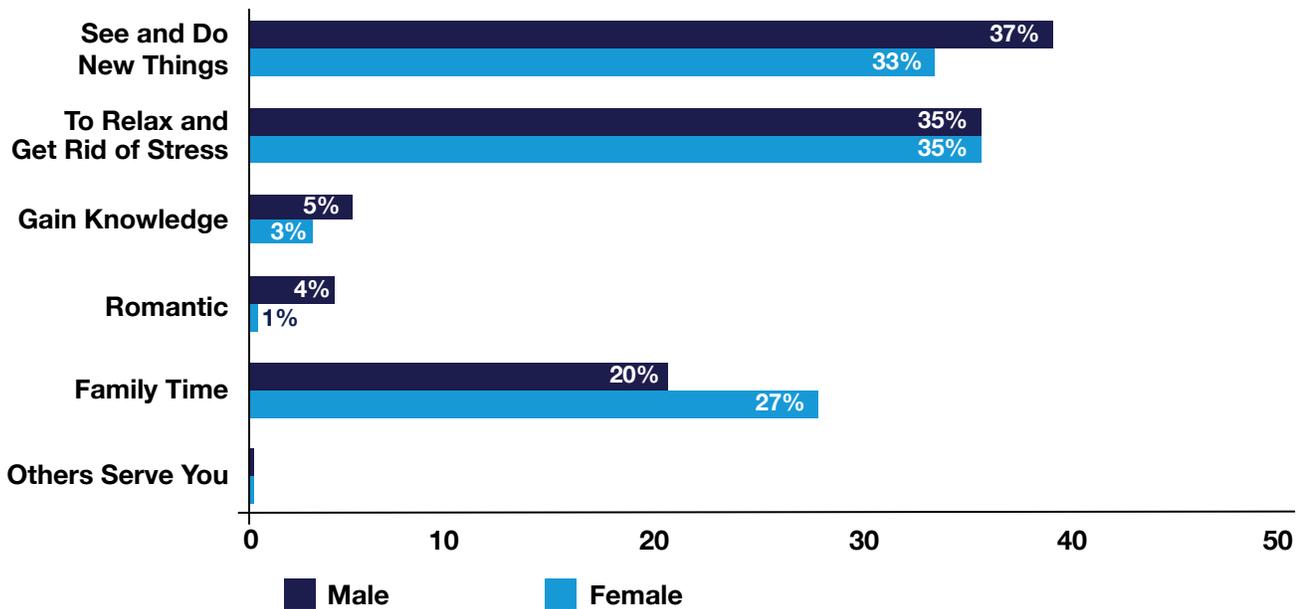


Figure 14 Non-Cruisers: Reasons to Take a Vacation by Gender



# BY THE NUMBERS

Figure 15 Factors Influencing Vacation Choice- Trend Over Time

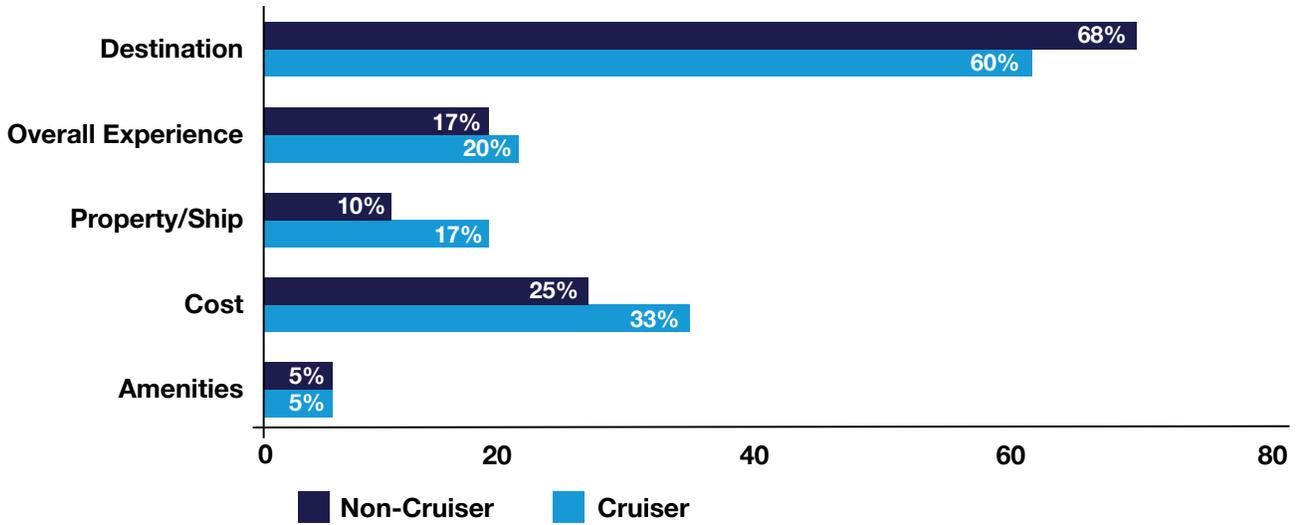
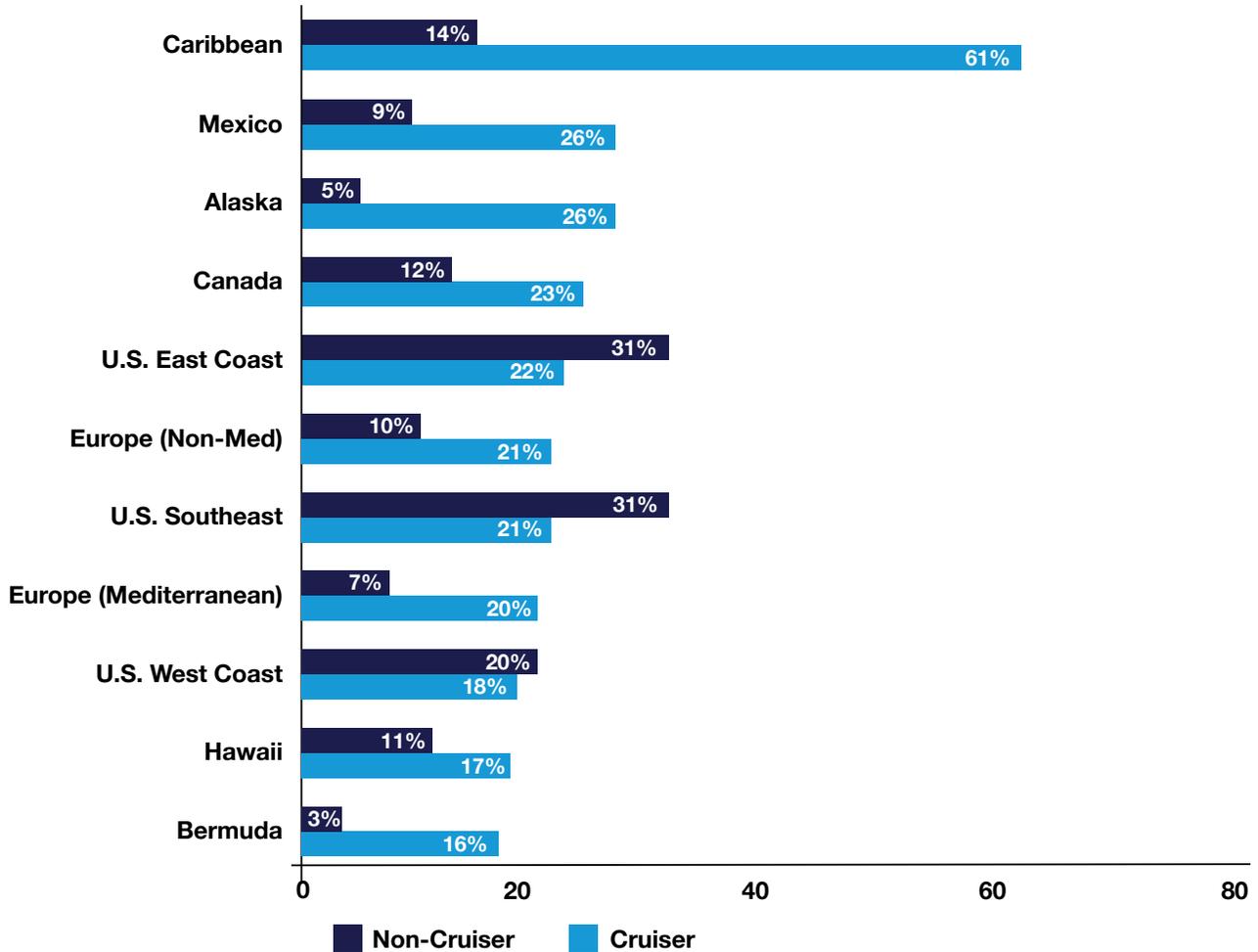
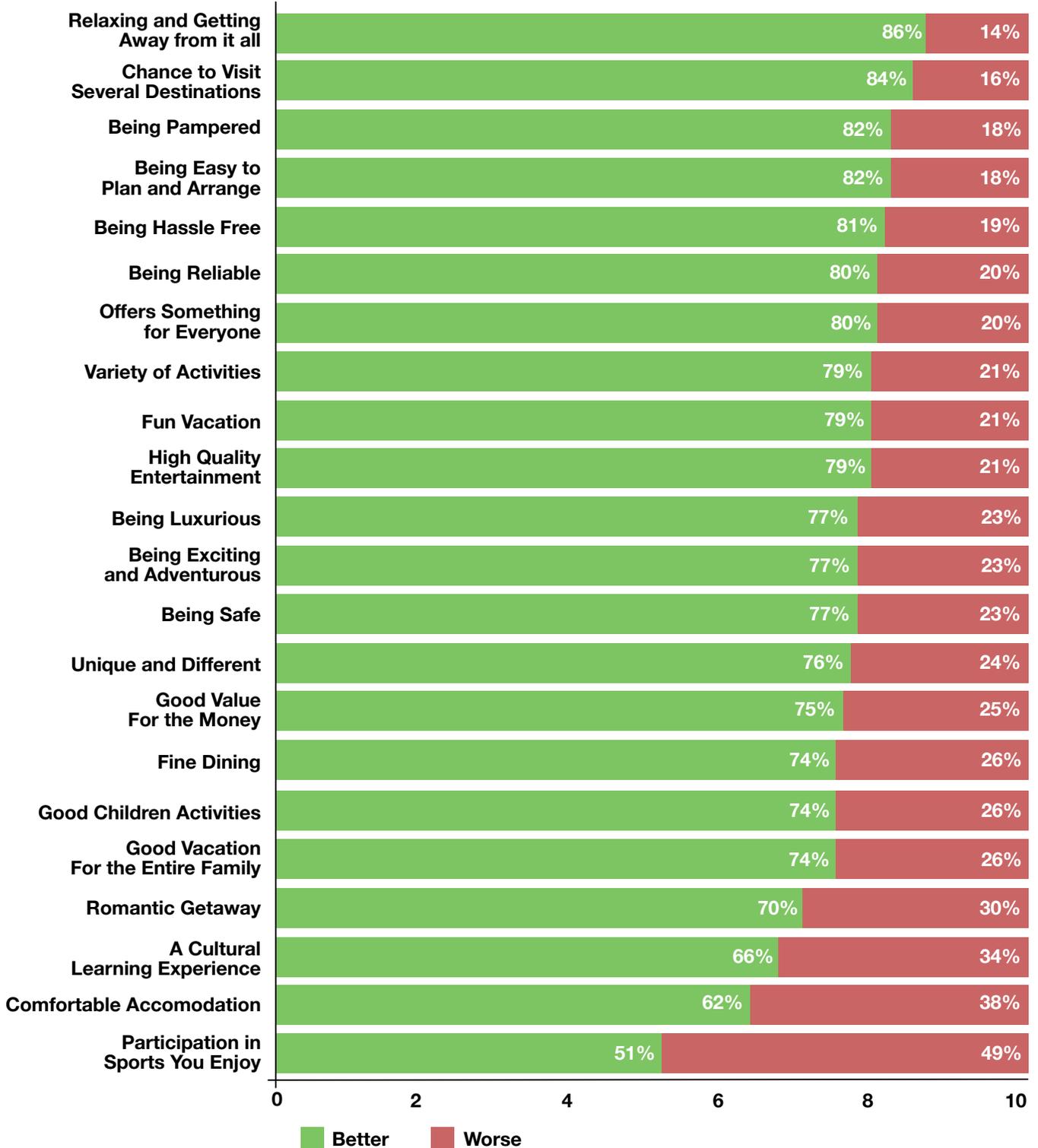


Figure 16 Top Destination for Cruisers



# BY THE NUMBERS

Figure 17 Are Cruises Better or Worse Than Land Based Vacations in Terms of...



# BY THE NUMBERS

Figure 18 Length of Last Cruise by Average Age

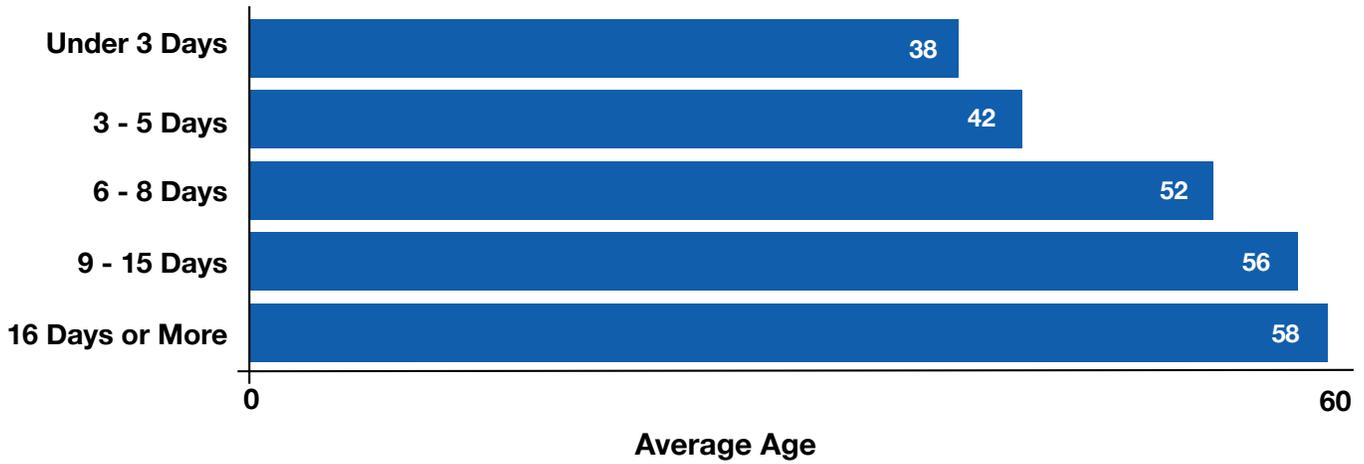
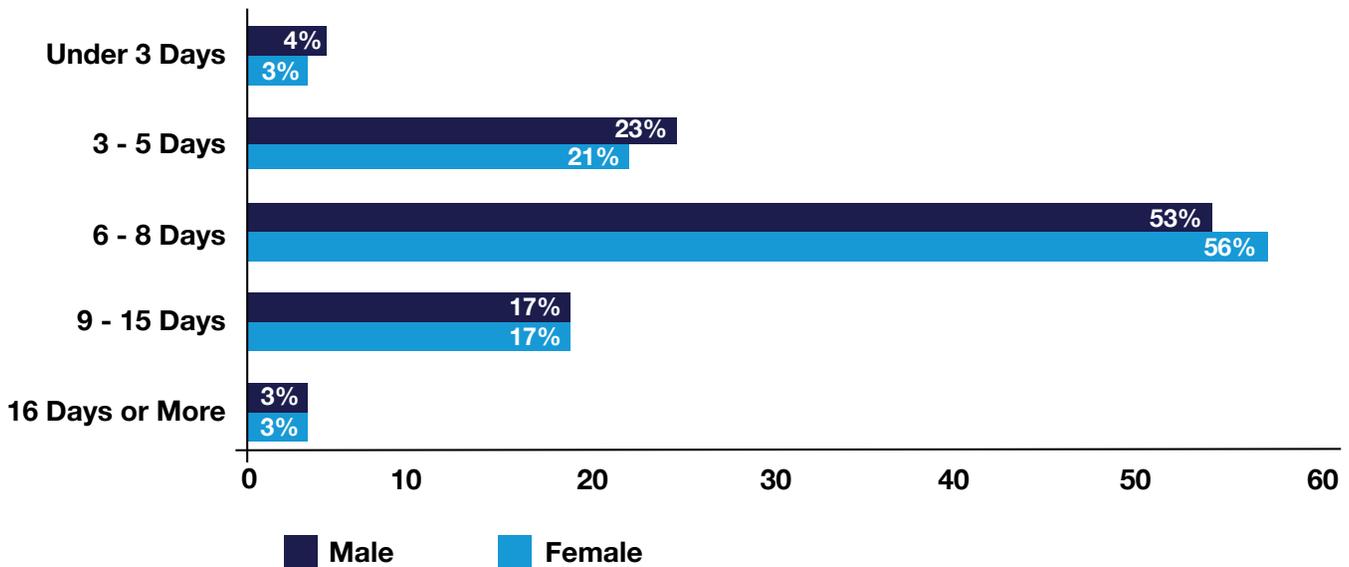
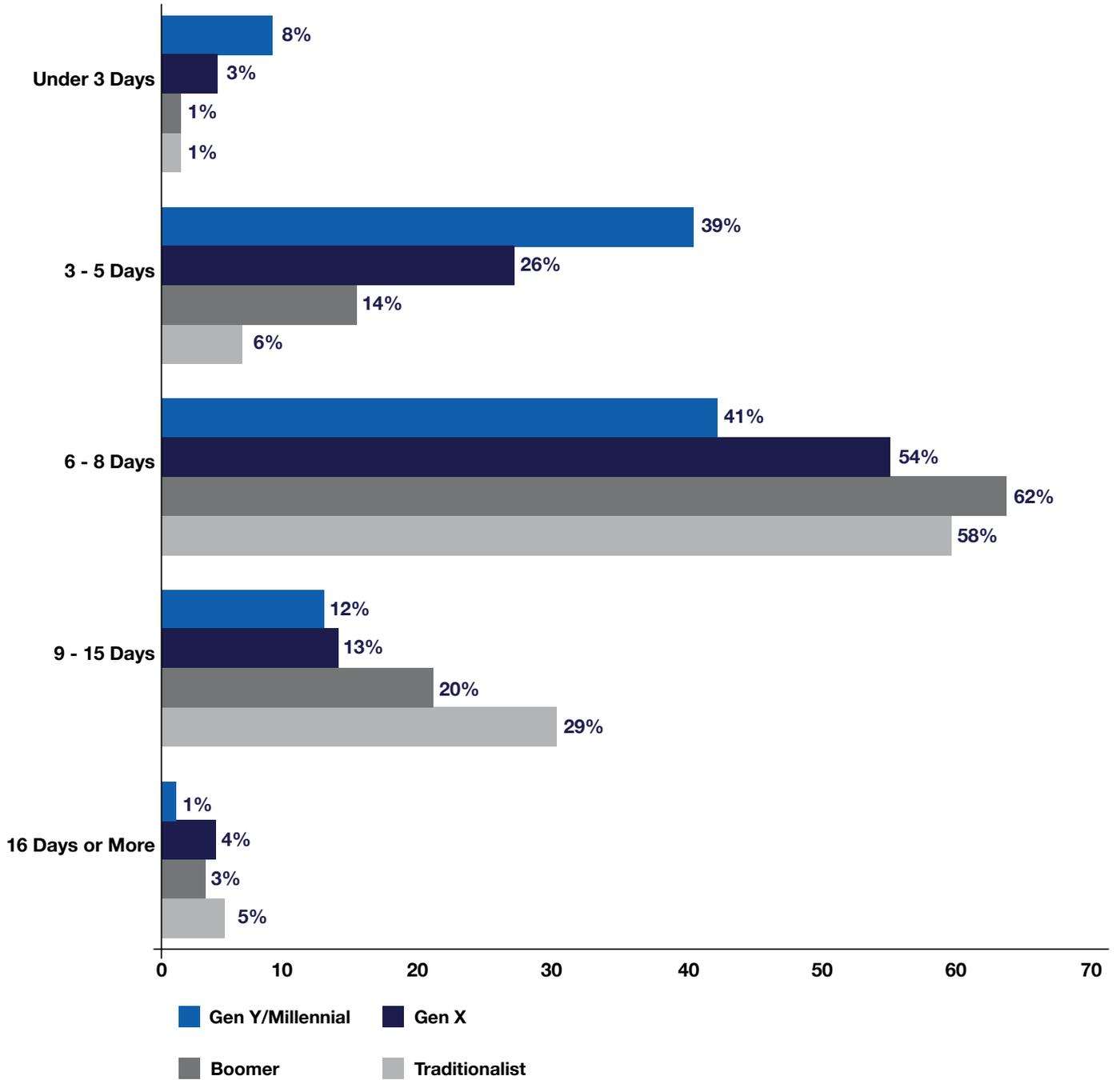


Figure 19 Length of Last Cruise by Gender



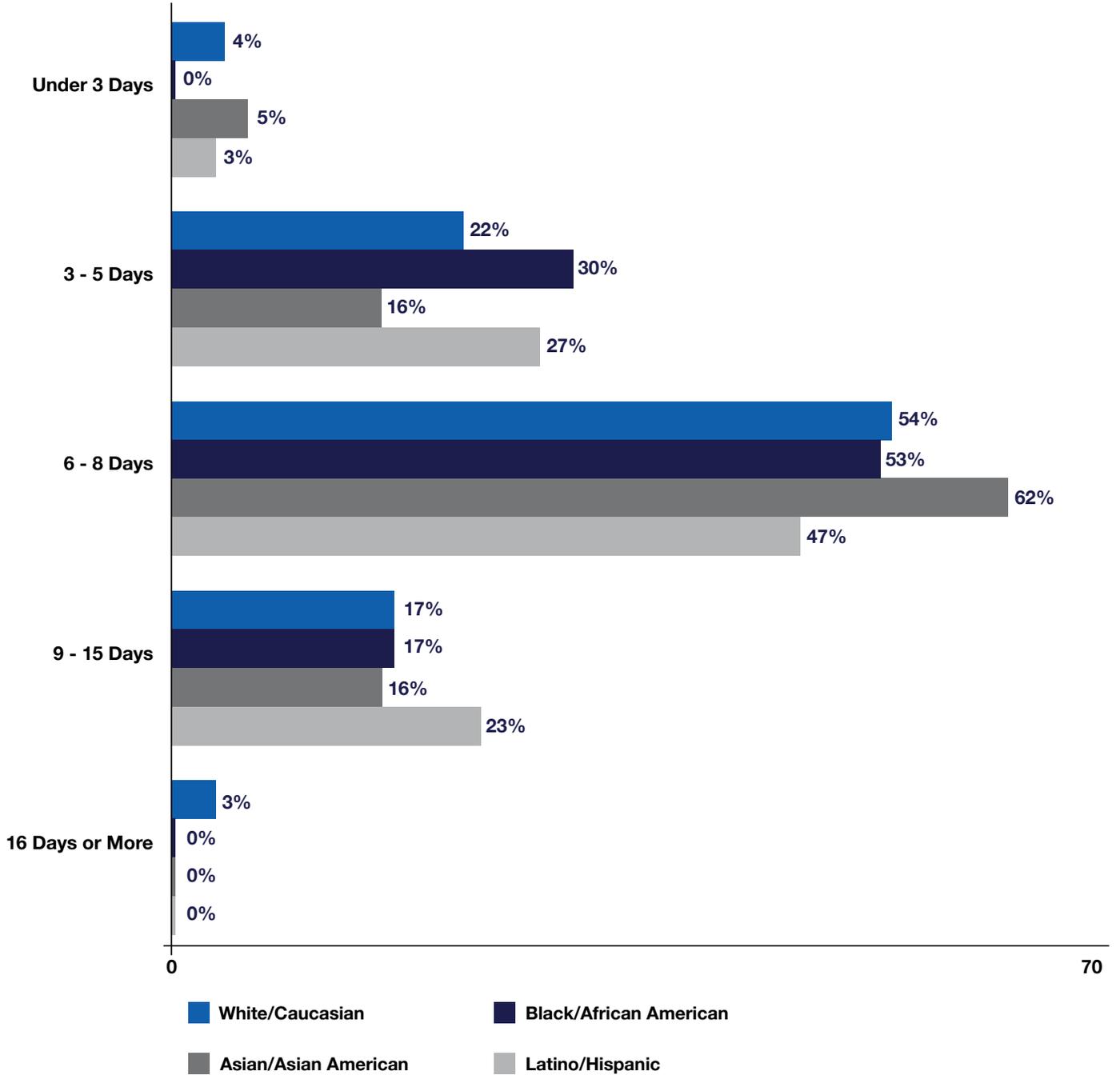
# BY THE NUMBERS

Figure 20 Length of Last Cruise by Generation



# BY THE NUMBERS

Figure 21 Length of Last Cruise By Ethnicity



# BY THE NUMBERS

Figure 22 Length of Last Cruise by Income Range

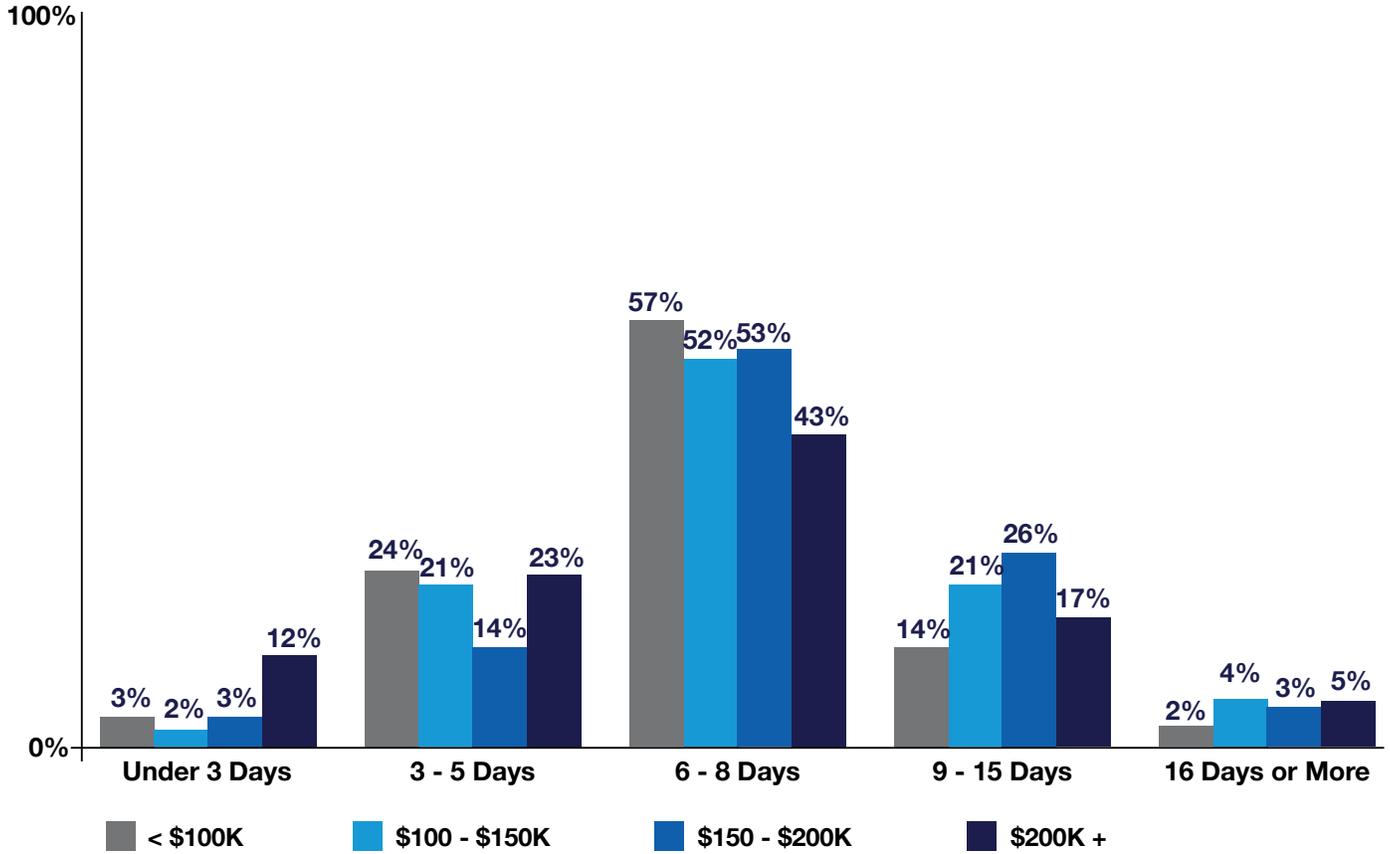
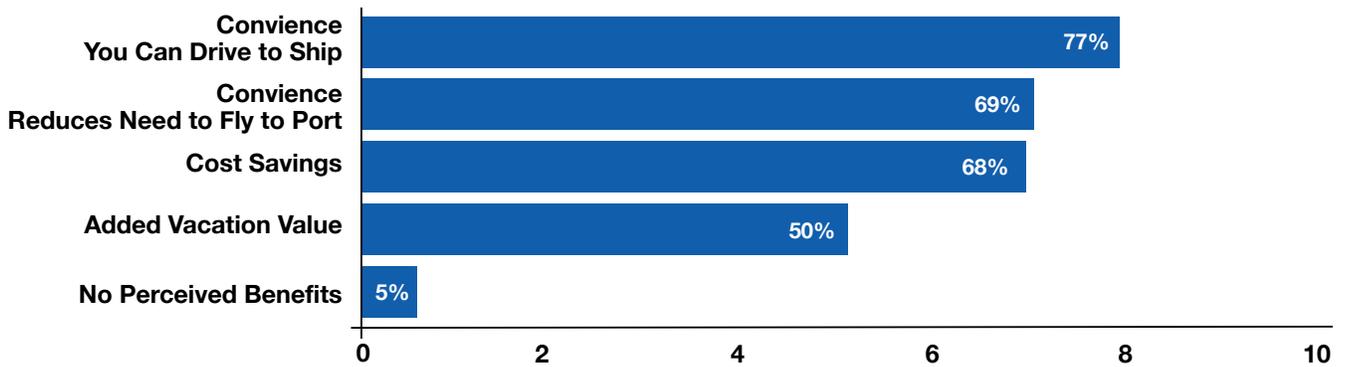


Figure 23 Benefits of Having More Cruise Embarkation Options



# BY THE NUMBERS

Figure 24 Interest in Cruising, Increasing or Decreasing?

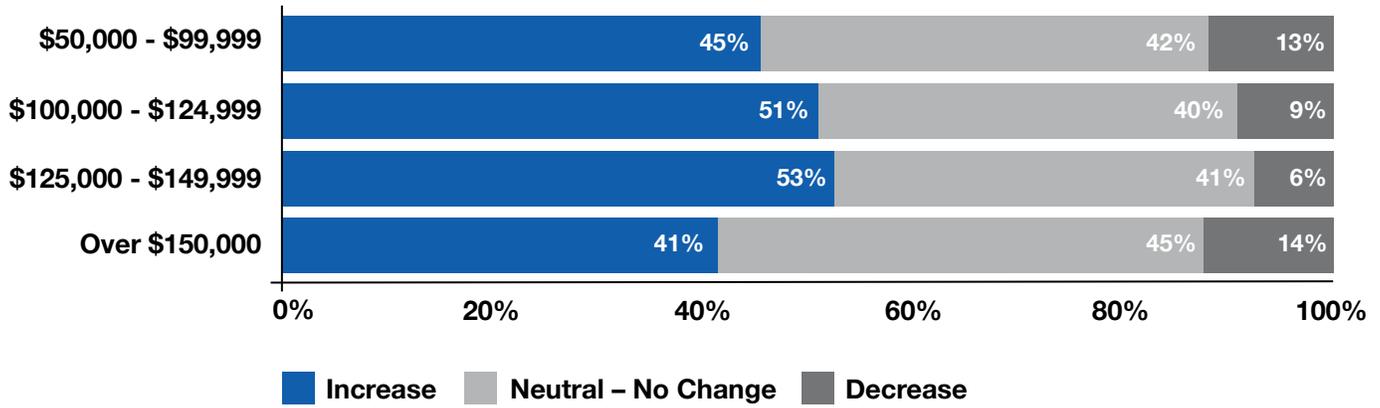
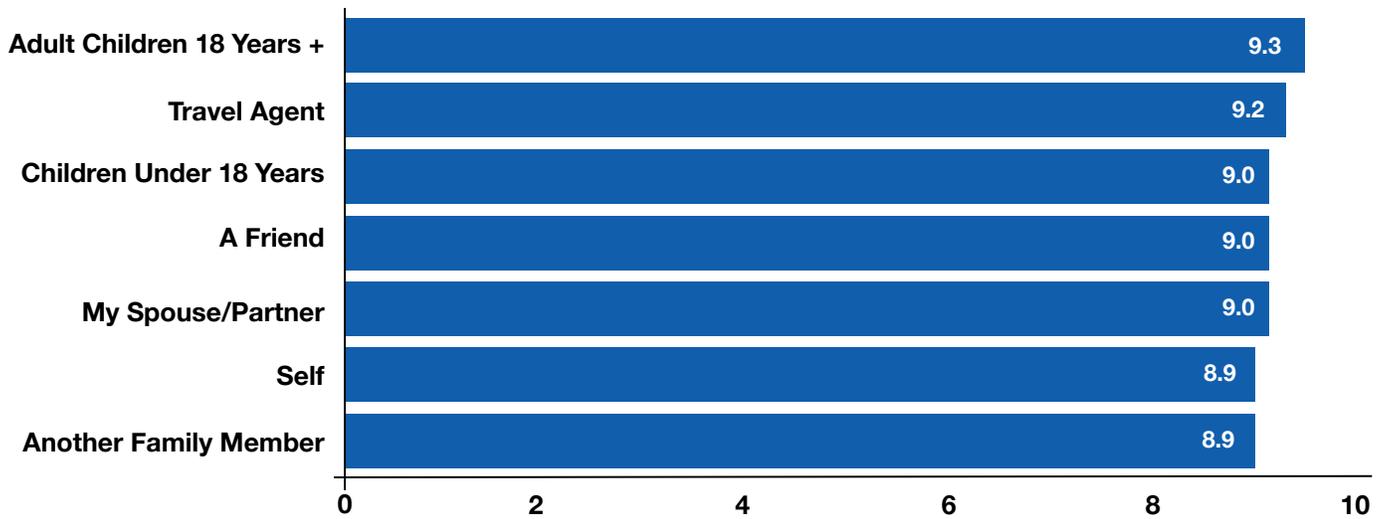


Figure 25 Satisfaction Level Based on Who is Making Final Decision



# BY THE NUMBERS

Figure 26 How Far in Advance Are Vacations Booked- Cruisers Vs. Non-Cruisers

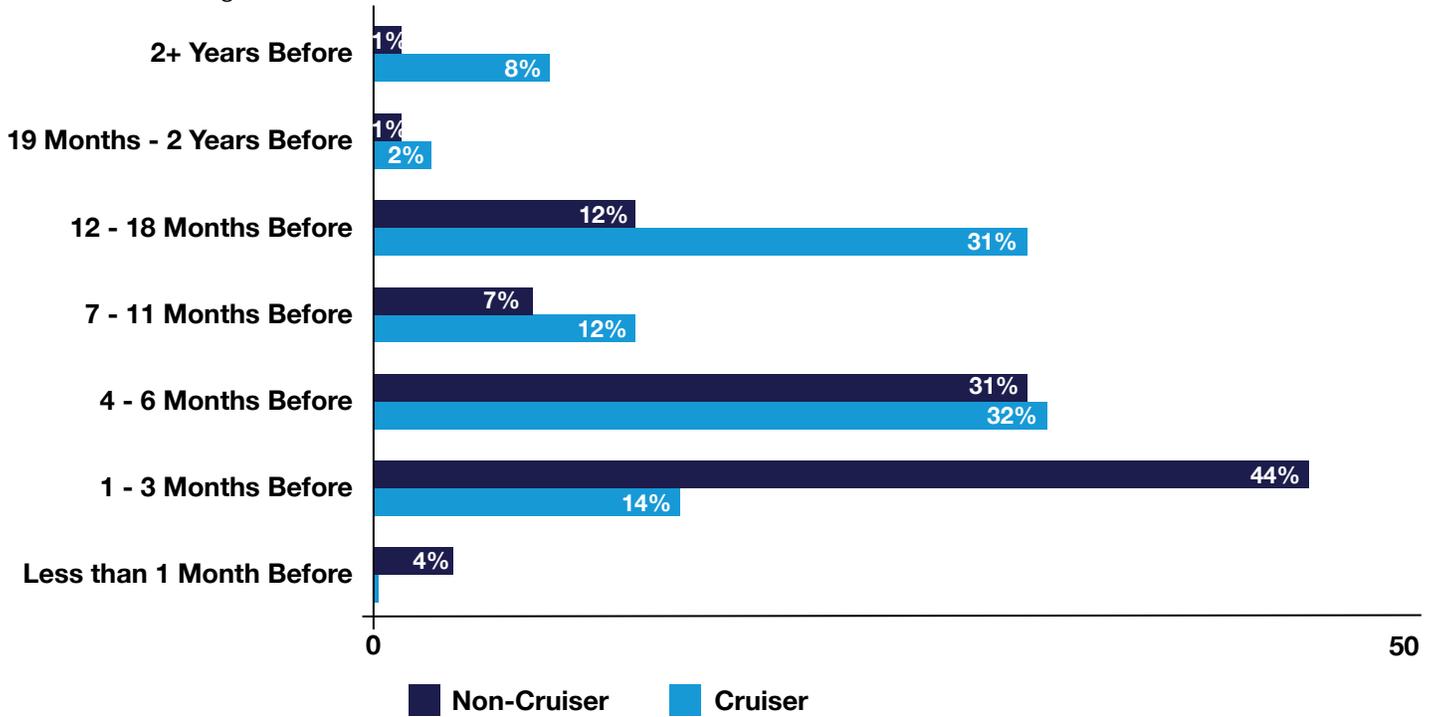
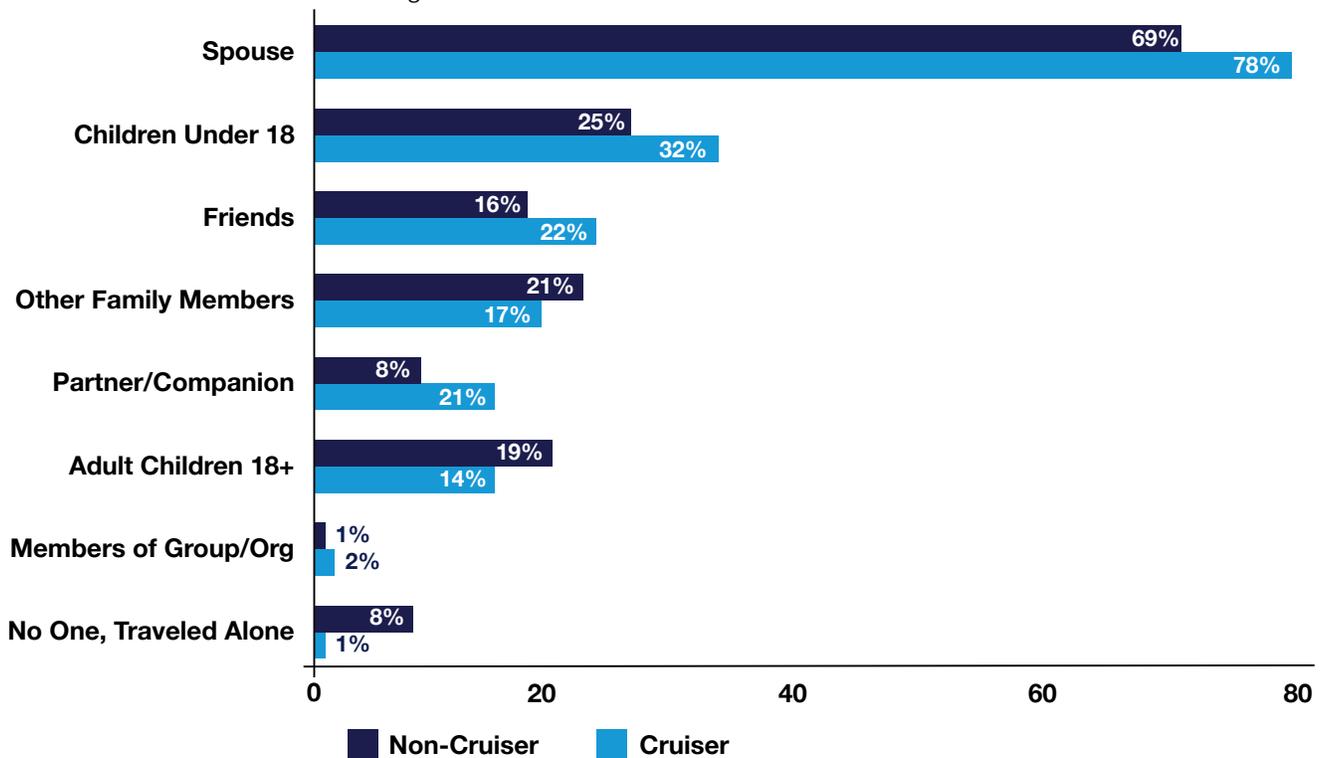
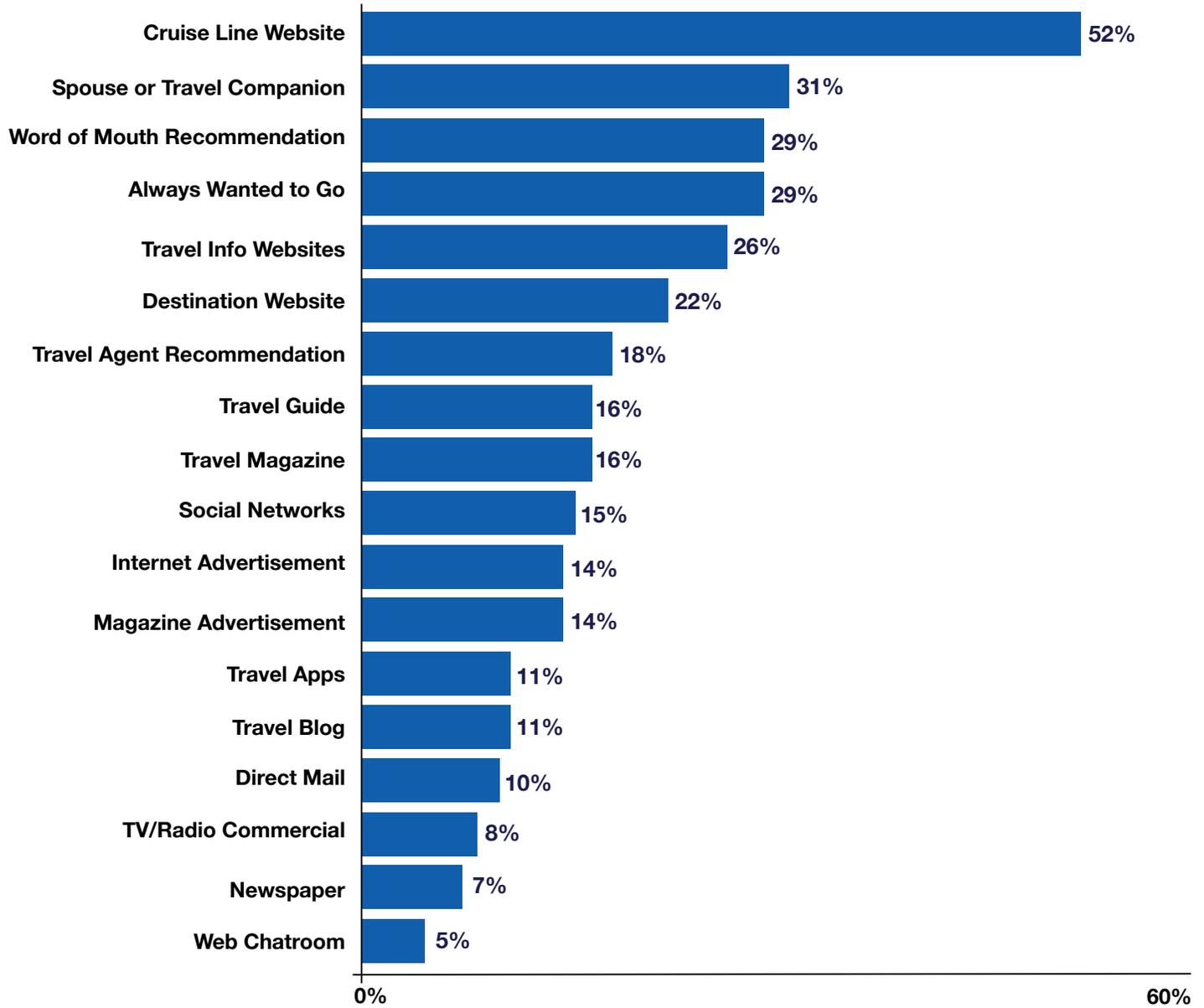


Figure 27 Who Do Vacationers Travel With?



# BY THE NUMBERS

Figure 28 Sources Influencing the Vacation Choices of Cruisers



# BY THE NUMBERS

CRUISE FACTS	2017	2016
Total # of Cruises Taken as an Adult	6.37	5.32
Total # of 3+ Day Vacations Taken in the Past Year (both cruises and land vacations)	3.93	3.67
# 3+ Day Vacations Taken in the Past Year or Longer that Included a Cruise	1.91	2.27

CRUISE TRAVEL PARTY	2017	2016
Total # (Including yourself)	3.85	3.65
Infant Under 2 Years Old	0.26	0.13
Children 2 - 5	0.50	0.25
Children 6 - 12	0.93	1.07
Teenager 13 - 17	0.80	0.58



## SUMMARY

Cruisers love to travel in groups—with friends, companions, spouses and family—and they use their trips to not only have fun (and adventure), but to sample multiple destinations for future land-based trips. They are also extending their stays in port cities worldwide to experience different places and cities.

Cruising knows no bounds when it comes to income; there is a cruise for every income bracket. Contemporary cruises remain the most popular across all income sets, and Millennials and GenXers are more likely to cruise than Boomers and Traditionalists. Millennials love to travel in luxury; they choose luxury, premium and river cruises at a higher rate than the other generations, and they are less likely to choose contemporary lines than other age cohorts.

Cruisers name child services, balconies/suites and celebrity chefs as leading services and amenities, but onboard find themselves using other features entirely. They are finding casinos and gambling, onboard shopping and duty-free, pools and Jacuzzis, specialty restaurants, onboard entertainment to be much more enjoyable than they expected.

Travel agents are an integral part of planning the cruise experience, and cruisers rate their agents more highly than non-cruisers. Cruisers who use travel professionals are also more likely to be satisfied with their experience than those who did not, and they are more likely to book another trip, as well.

Ten states represent 62% of cruise travelers from the U.S., largely from the east, west and gulf seaboard, together with a Midwest contingent. From those Top 10 states, more than three quarters of cruisers are traveling to the Caribbean/Bahamas/Mexico—except in California, which only sends 22.7% to that region. Instead, Californians are heading largely to the North American West coast.





1201 F STREET NW, SUITE 250  
WASHINGTON, DC 20004  
+1.202.759.9370