

Cruisers of the Future



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Cruisers of the Future

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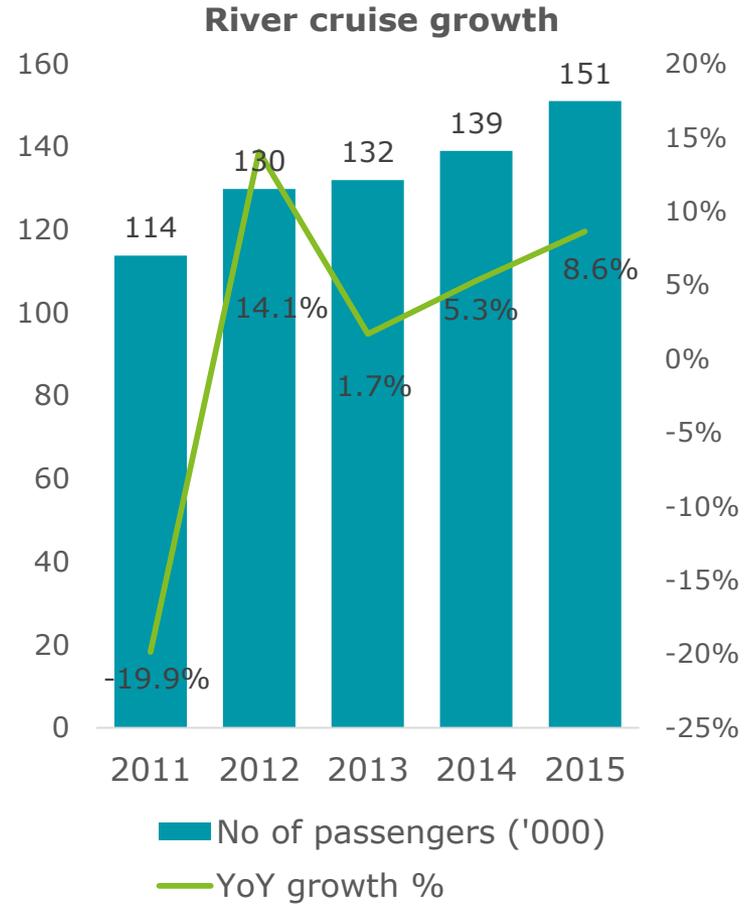


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Alistair Pritchard, October 2016

Sectoral growth

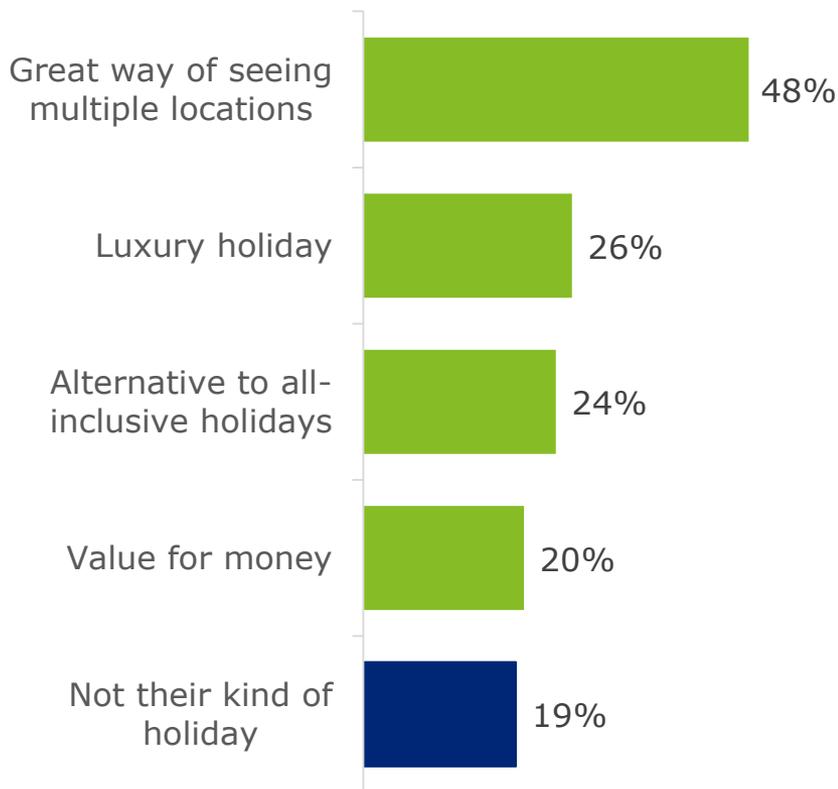
The UK cruise sector registered growth of 9.9 per cent in 2015; highest growth amongst all major European markets



Current cruise holiday preferences

Consumer sentiments towards cruise change as companies adapt their offerings

Consumer perceptions about cruise holidays



Popularity of cruise holidays

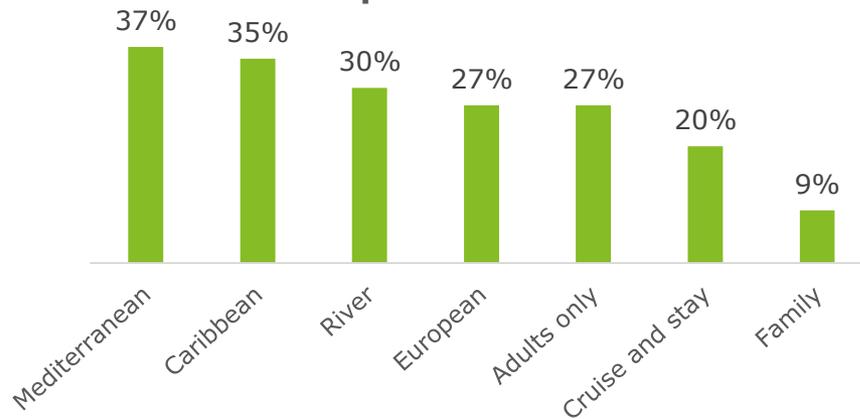


3rd most preferred holiday type



32% of consumers planning a cruise holiday

Preference for different cruise products



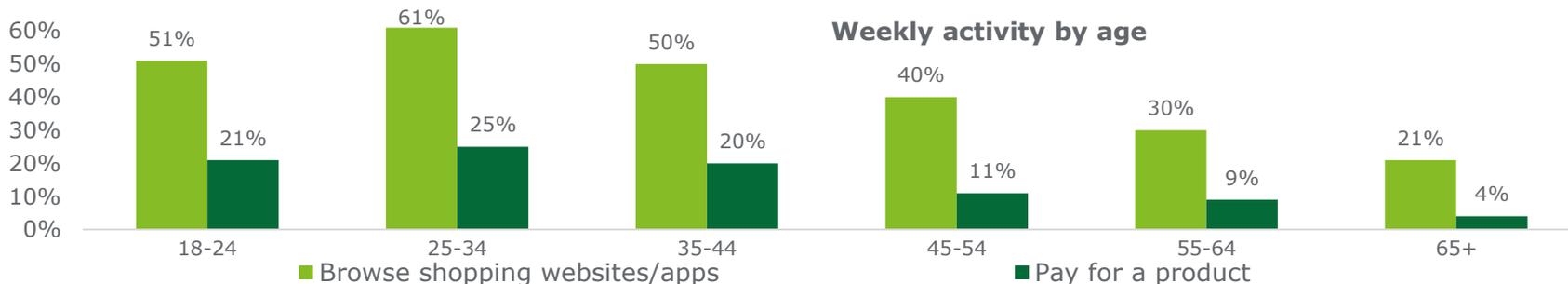
Source: BTA survey 2016

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How is consumer behavior is changing

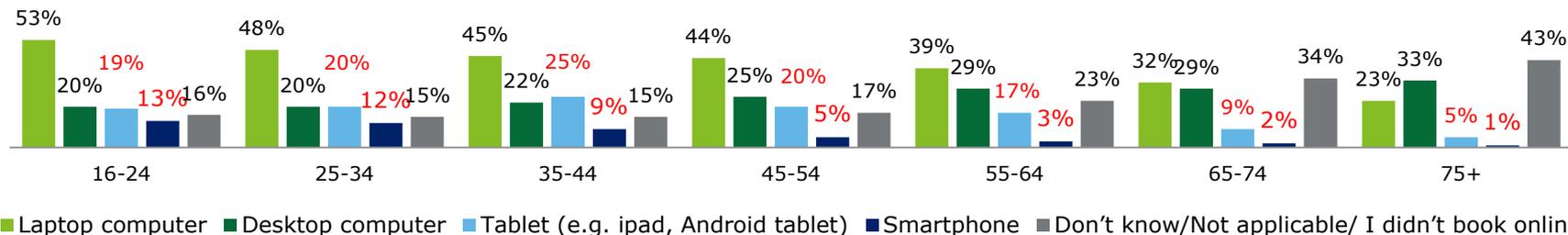
People are interacting with brands in new ways as digital technologies such as smart devices continue to change behavior

In retail younger consumers are much more likely to browse and pay on their mobile phones



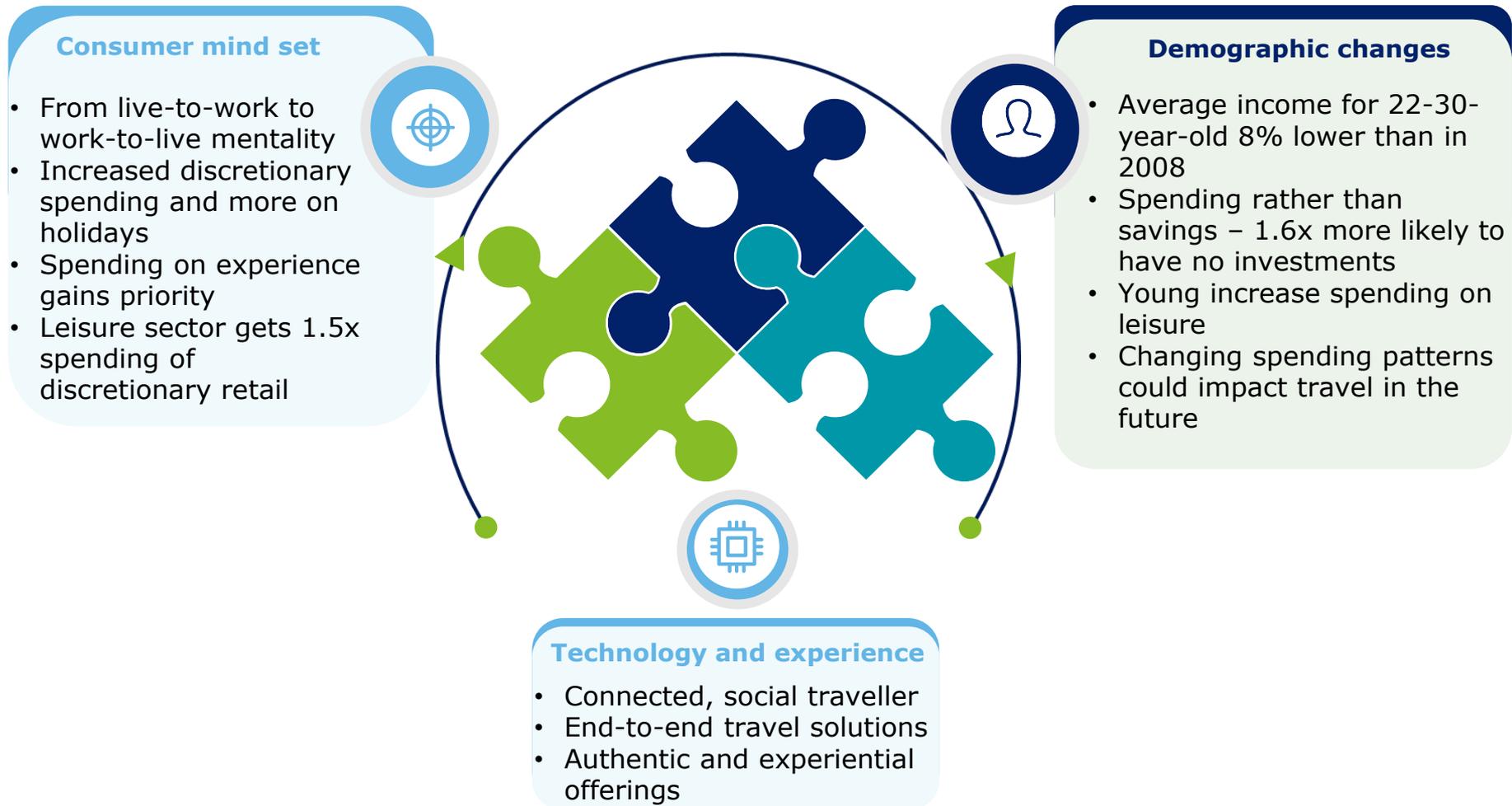
One in ten under 44 year-olds use smartphones and nearly a quarter use tablets to book their holidays

Device for making the final booking for last holiday



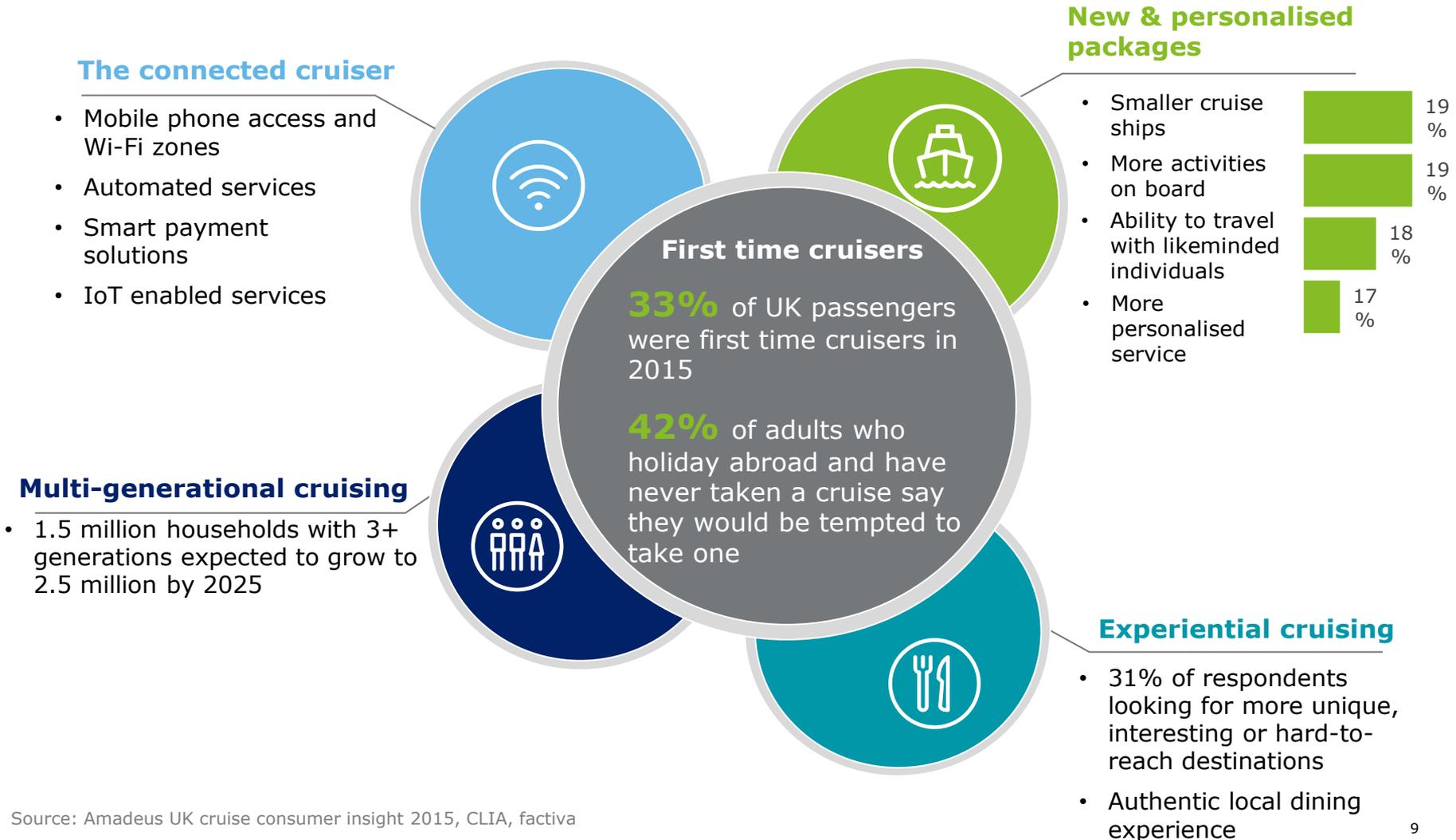
Changing face of travel and leisure

Consumer mentality towards discretionary spending positive but younger consumers might have less to spend in the future



Cruise consumer of tomorrow

The cruise consumer of tomorrow is looking for unique, customised and authentic cruising experiences heightened by digital connectivity

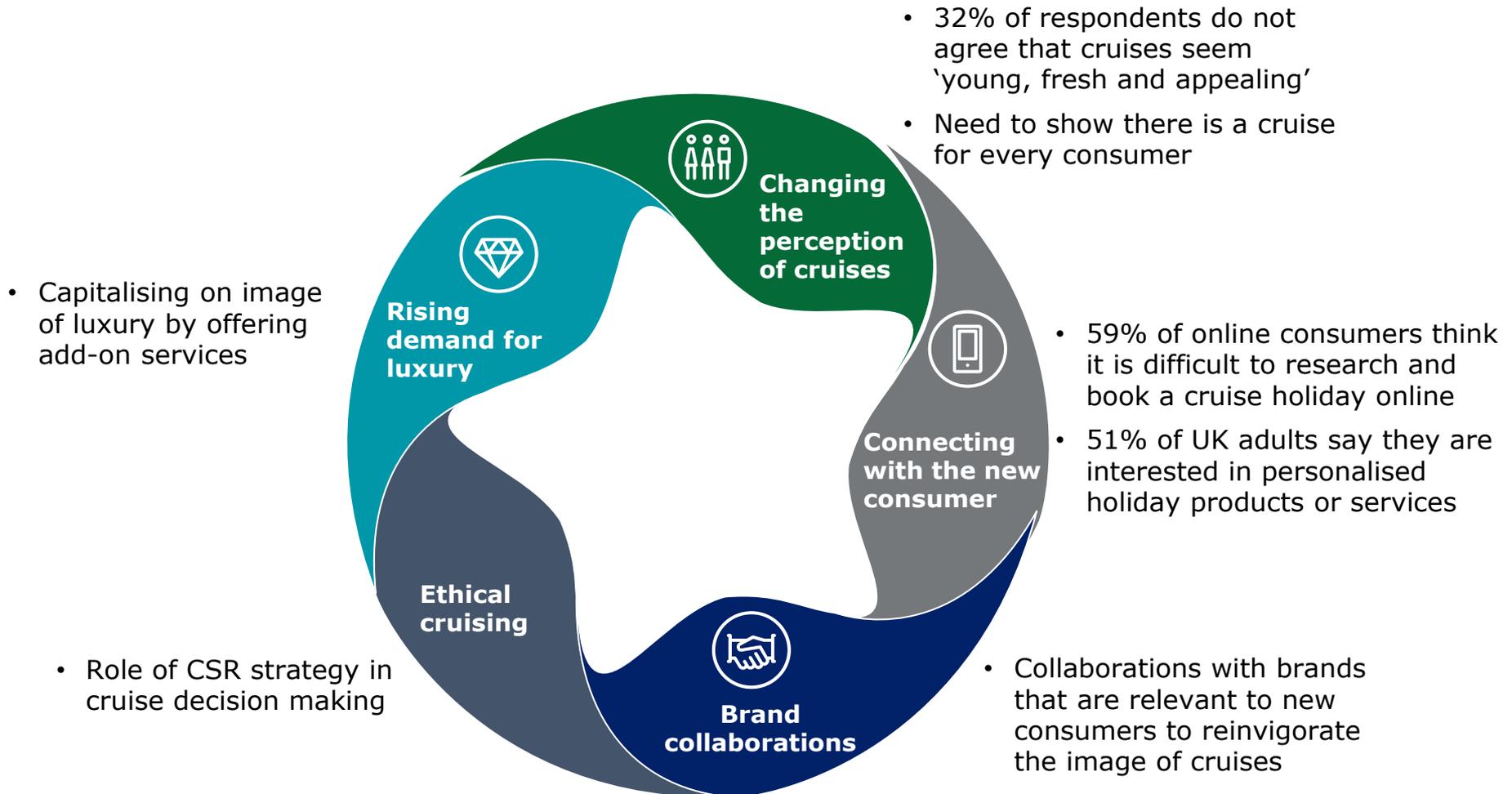


Source: Amadeus UK cruise consumer insight 2015, CLIA, factiva

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Cruising the new way

The new cruise line offers aim at more holistic and meaningful holiday experience with activities and entertainment for all generations



Source: CLIA Cruise industry outlook 2016; factiva; Made-to-order: The rise of mass personalization, Deloitte 2015

Key takeaways

- **Substantial growth in recent years**
- **Perceptions among current consumers is positive**
- **However, consumer behavior is changing:**
 - **More focus on technology, not just among the young**
 - **The financial circumstances of the younger generations mean they might have different spending patterns**

- **The industry needs to highlight there is a cruise for every type of consumer**
- **The cruise consumers of tomorrow don't want to be off-line – Need to invest in technology now**
- **Multi generational will be increasingly important which the industry needs to cater for**
- **Consumers also want personalized and local holiday experiences**



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