



CRUISE LINES  
INTERNATIONAL  
ASSOCIATION, INC.

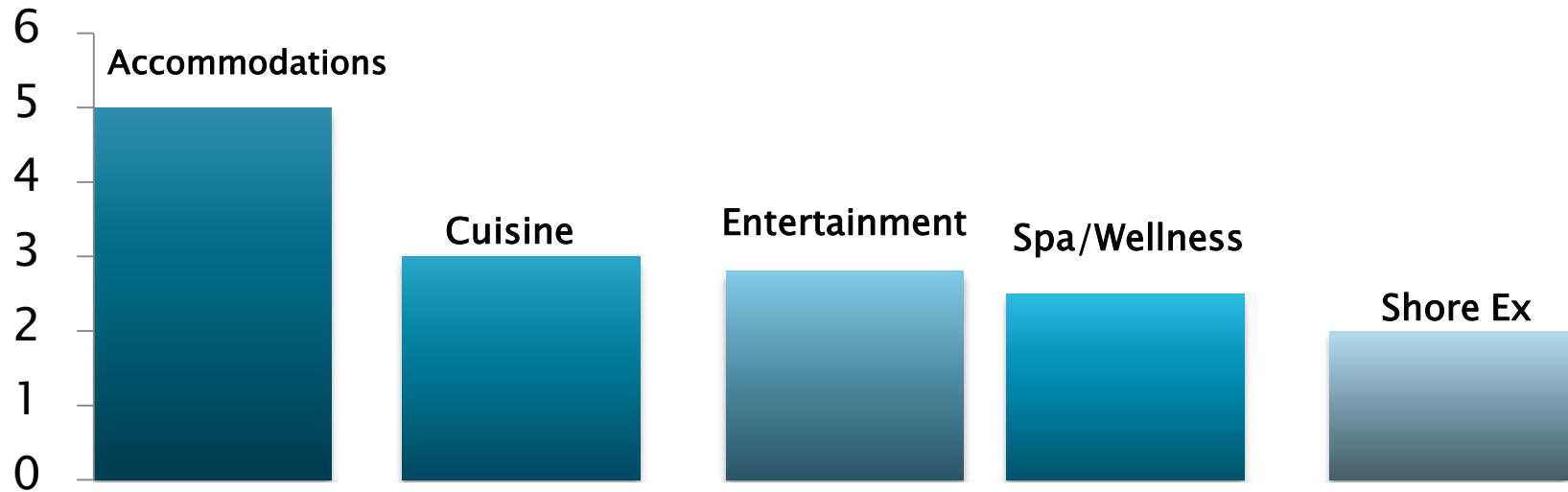
# Consumer Cruise Lifestyle Trends Survey

June 2011

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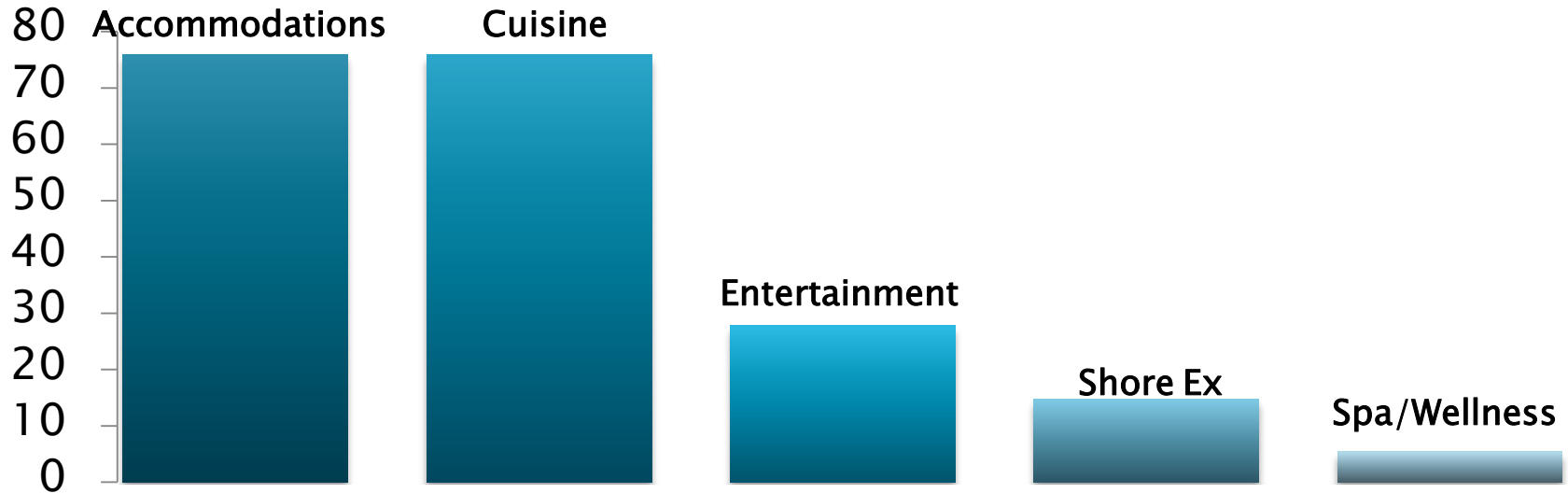
- ▶ Methodology
  - CLIA member Agents were surveyed according to their knowledge of Client preferences.
  - Approximately 1,000 respondents.
  - Survey conducted in early June, 2011.

# Important Factors Influencing Cruise Line Choice



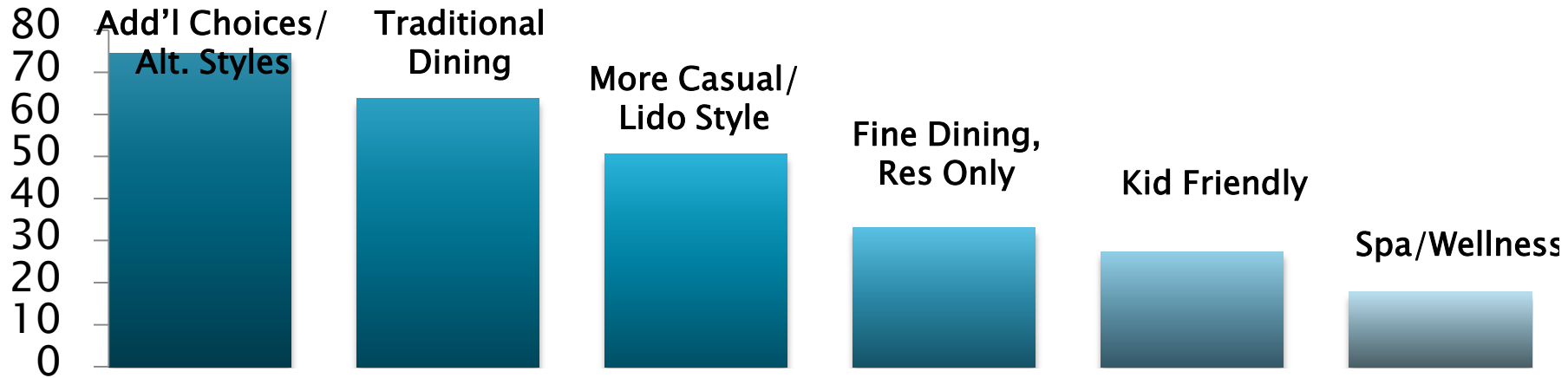
In choosing a Cruise vacation, Accommodations are most important to consumers followed by Cuisine, Entertainment, Spa/Wellness and Shore Excursions.

# Gaining Importance Among Today's Cruisers



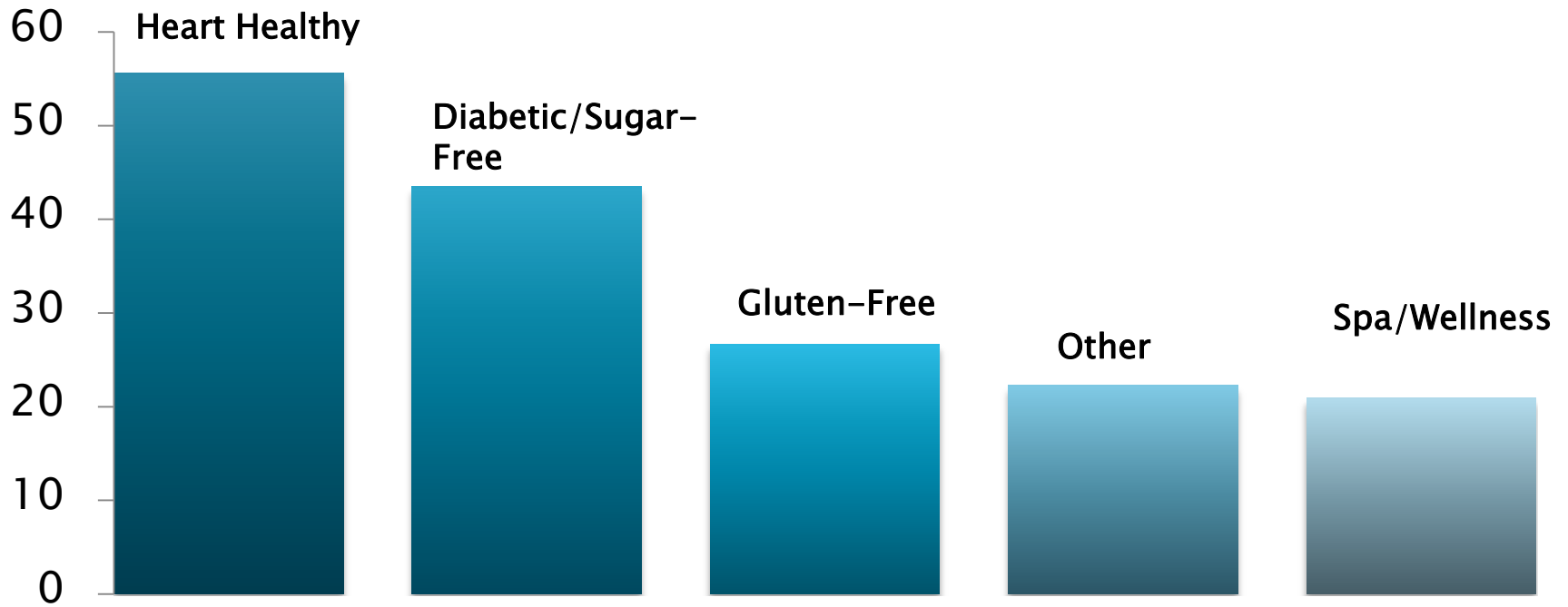
Accommodations (76%) and Cuisine (75.9%) are gaining importance for Consumers when they are selecting their Cruise Vacation.

# Consumer Dining Preferences



Almost 75% of Consumers look for added choices of Alternative styles of restaurants, followed by traditional dining, then more casual/lido style.

# Special Dietary Requests



More clients are requesting Heart Healthy cuisine, followed by diabetic/sugar-free menus.

# Concerns About Weight Gain

- ▶ Agents report that Cruise Lines seem to have overcome the perception that cruise passengers worry about gaining weight.
- ▶ Only 10% of Agents reported that their Clients express concerns more than occasionally.

# Spa/Wellness Interest

- ▶ Workout Facilities and Adults-only (kids-free) facilities top the list of Spa and Wellness interests.
- ▶ Somewhat less important to clients are:
  - Saunas and Hot Tubs
  - Spa Services
  - Running Tracks and Group Exercise Programs
  - Beauty Salons
- ▶ The Majority felt that their clients believed shipboard facilities compared favorably to those on land and have improved in the last 3 years.



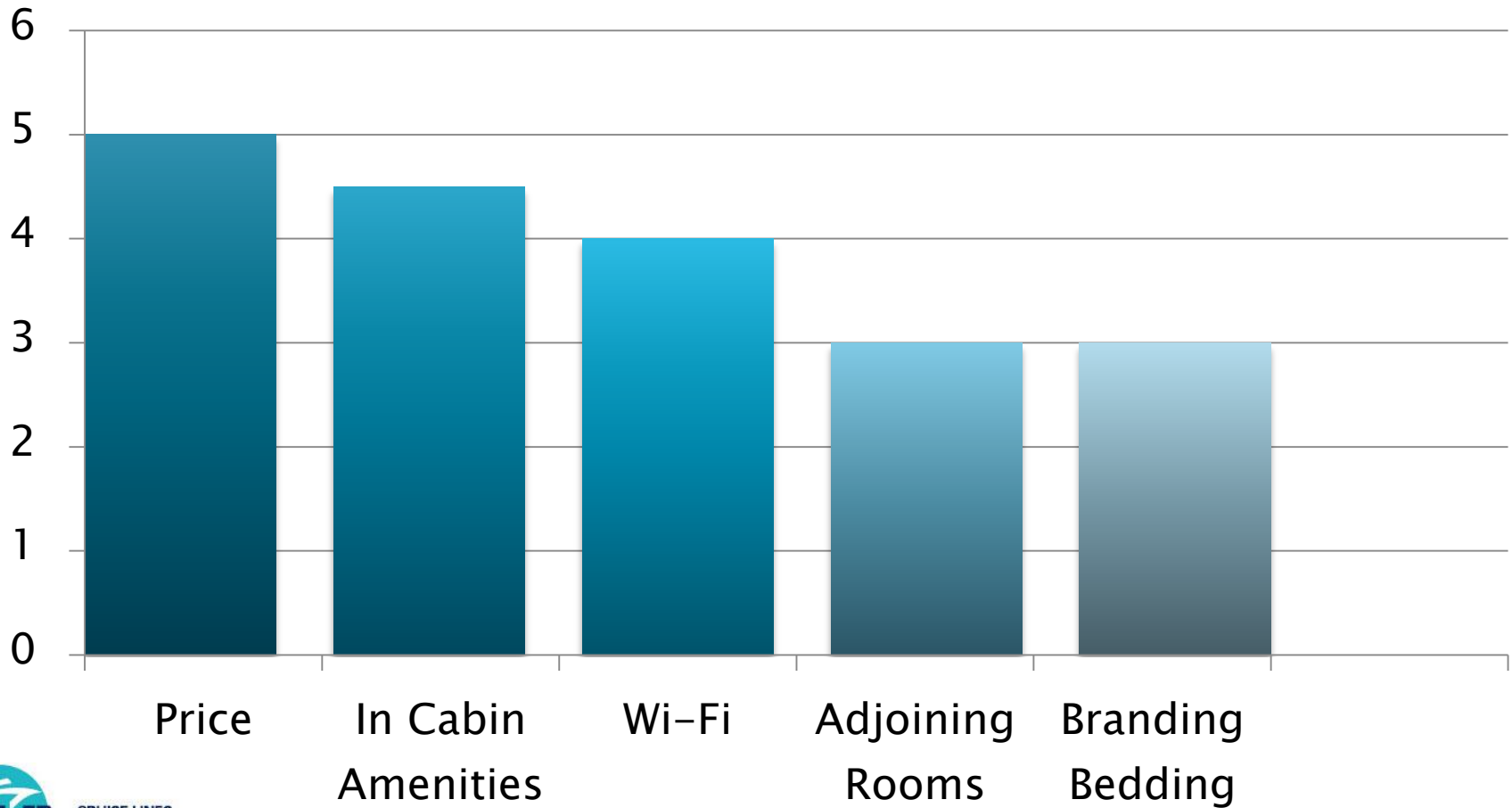
# Shipboard Entertainment Interest

- ▶ Almost 80% of agents Surveyed believed that their Clients felt as if shipboard entertainment has improved over the last 3 years.
- ▶ Broadway style shows, Las Vegas style revues and “Famous name” acts rank at the top of consumers’ preference lists.
- ▶ 60% of respondents indicated that shipboard entertainment compares favorably to that offered by land-based vacations.

# Accommodations

- ▶ Price is the top consideration when choosing shipboard accommodations.
- ▶ Followed in order by:
  - In-cabin amenities
  - Wi-Fi
  - Adjoining Rooms
  - Branded Bedding
- ▶ 90% of Agents indicated that their Clients believe accommodations have improved somewhat or greatly in the last 3 years.

# Important Factors Relating to Accommodations



# Shore Excursions

- ▶ Agents indicated the most popular shore excursions are “sun and sand” experiences including: beach, snorkeling, and water sports.
- ▶ City tours and adventure excursions, such as zip-lining, fishing, hiking and horseback riding, are also extremely popular.
- ▶ Next are shopping tours, arts and culture, eco-tours and extreme tours like cave tubing, jet fighter experiences and race car driving.
- ▶ There is also moderate interest in VIP tours.

# Other Interesting Findings

- ▶ The fastest growing segments of cruising are families with children, followed by multi-generational families.
- ▶ A casual elegant ambiance, closely followed by casual atmosphere are the favorites among most Agents' Clients, with both increasing in popularity compared to more formal or more laid back shipboard atmospheres.
- ▶ More Consumers are cruising to celebrate life milestones with weddings and vow renewals leading the list.