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Traveler's Road to Decision: Cruise Travel

Google/OTX
U.S., July 2009

Research Methodology

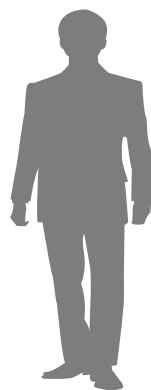
- Category covered: Cruise
- Survey of 5,002 consumers who have traveled at least once for personal/business purposes in the past six months
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

TRAVELER TYPES DEFINED



=

Personal Traveler
has taken at least one
trip for leisure in the
past 6 months



=

Business Traveler
has taken at least one
trip for business in the
past 6 months



=

Affluent Traveler
has taken at least one
trip for leisure in the
past 6 months and
has a household
income of \$150K+

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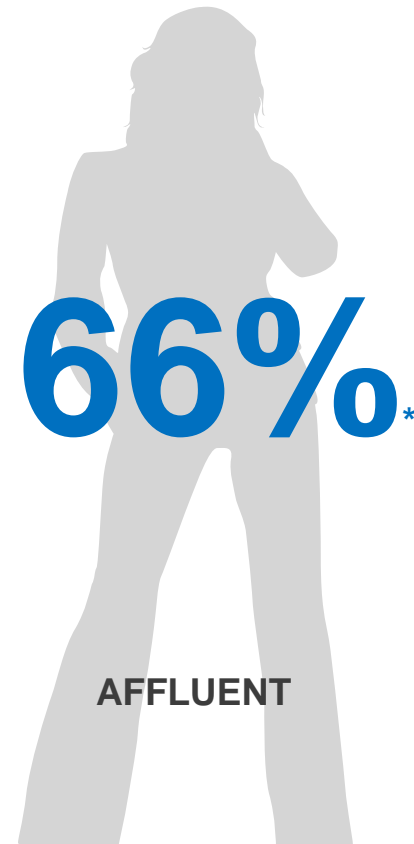
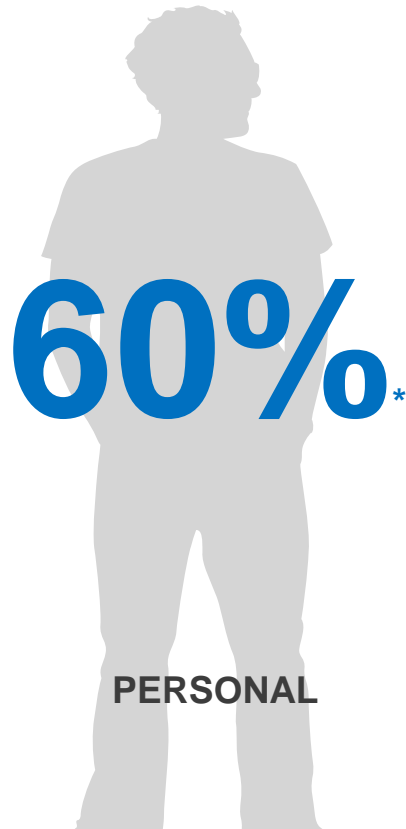
Key Findings

- 1 Just three in five cruisers know where they want to sail, and who they want to sail with, prior to beginning any research. That leaves two fifths ready to be influenced by the results of their search.
- 2 The Internet is the most popular tool for researching cruises.
- 3 Both business and personal cruisers most often go directly to the cruise website to book, although business travelers also commonly use an online cruise agent.
- 4 Almost everyone has, at some point, shopped around for cruises; over one in three *always* shop around. The main websites used for this purpose are Expedia, Google and Travelocity.
- 5 Practical considerations such as price, destination and length of cruise are important to the majority of people when booking a cruise. Reviews and recommendations are less critical.

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Three in five personal travelers know where they want to go and who they want to cruise with, prior to researching their cruise.



Prior to researching travel do you know where you want to go or what company you want to cruise with?

*Top 2 box summary

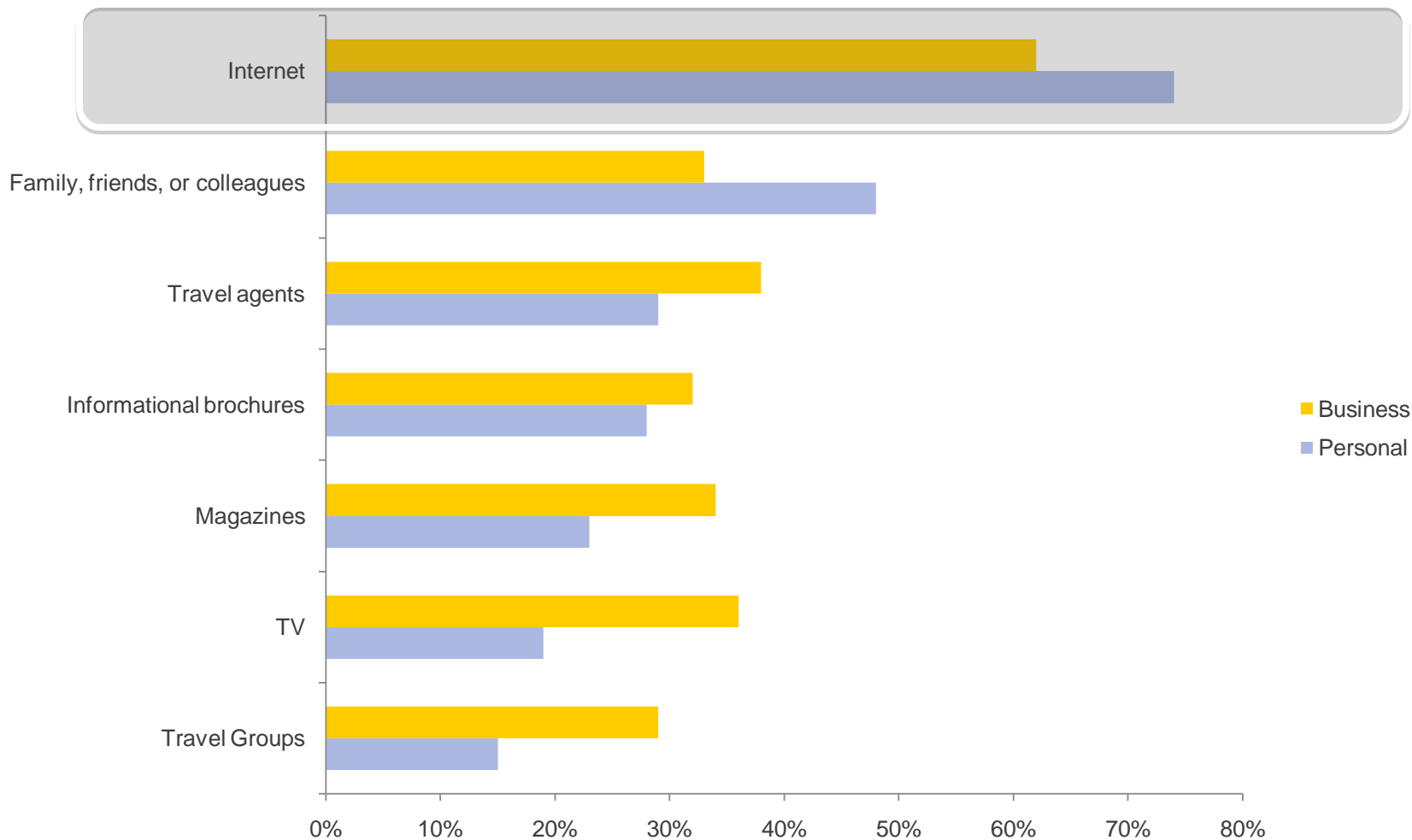
(QW2) Thinking about how you typically decide on which cruise to book for a personal vacation, how certain are you about the cruise line you want to use before you begin researching?

(QW3) Thinking about how you typically decide on which cruise to book for a personal vacation, how certain are you about the destination you want to visit before you begin researching?

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The Internet is the #1 Source For Cruise Research Among Both Business & Personal Travelers

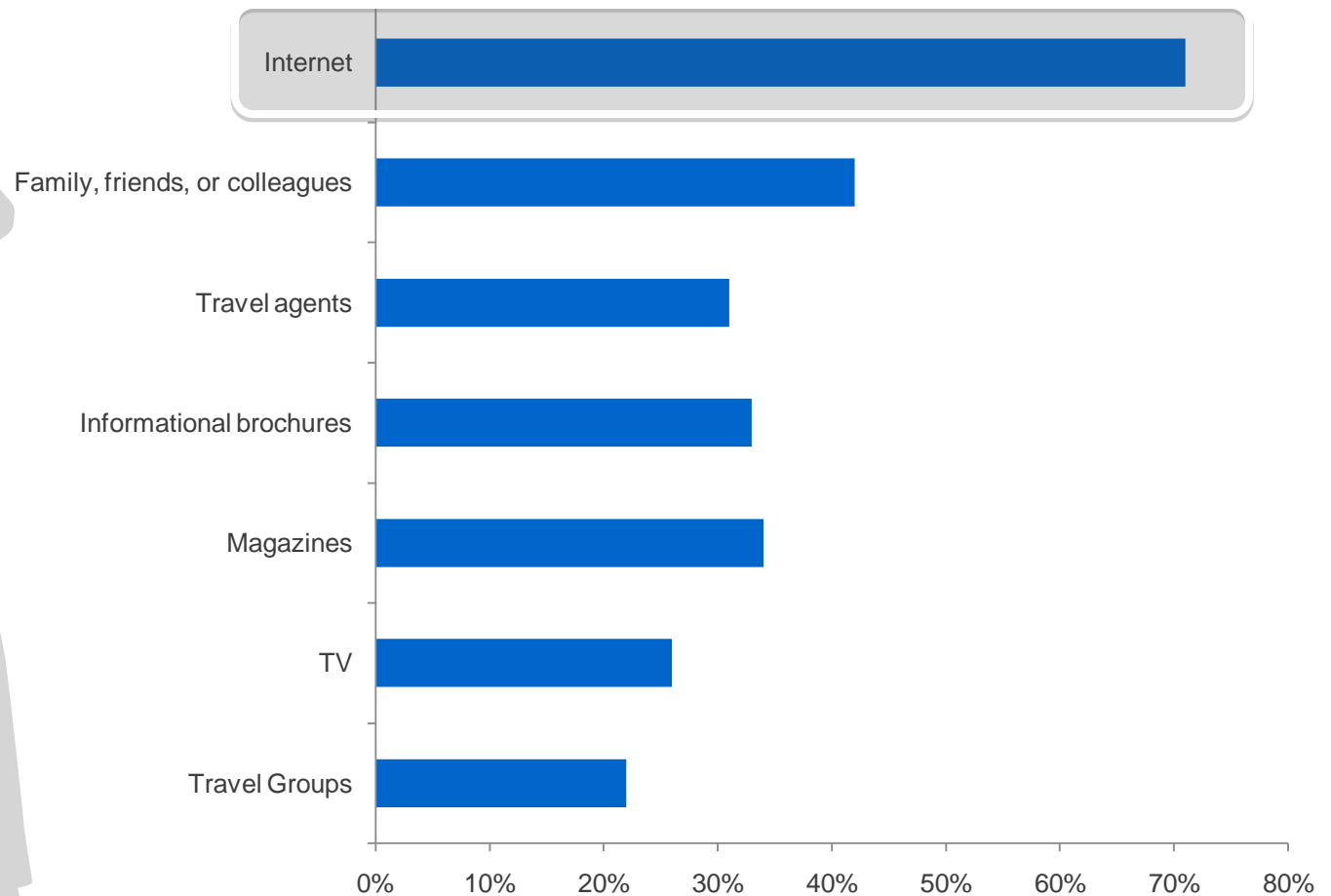
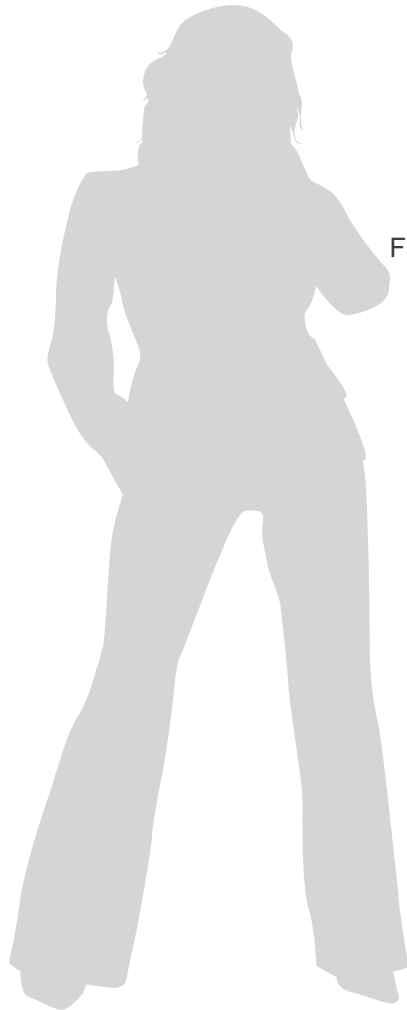


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(QW1) Which of the following sources, if any, do you typically use to learn about the cruises you've taken for personal/business travel?

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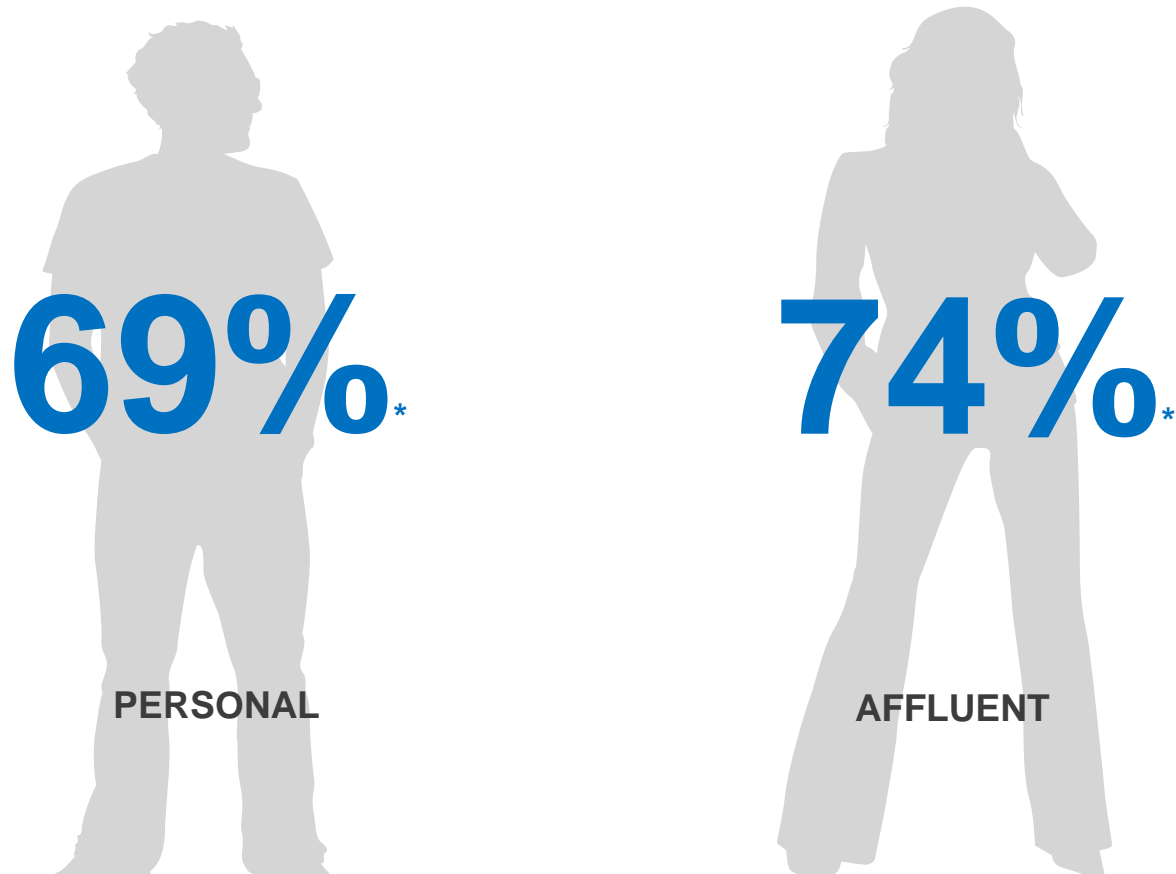
Affluents are Also More Likely to Use the Internet to Help Them Make a Decision



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(QW1) Which of the following sources, if any, do you typically use to learn about the cruises you've taken for personal travel?

The Majority of Consumers Go Online to Comparison Shop Before Booking



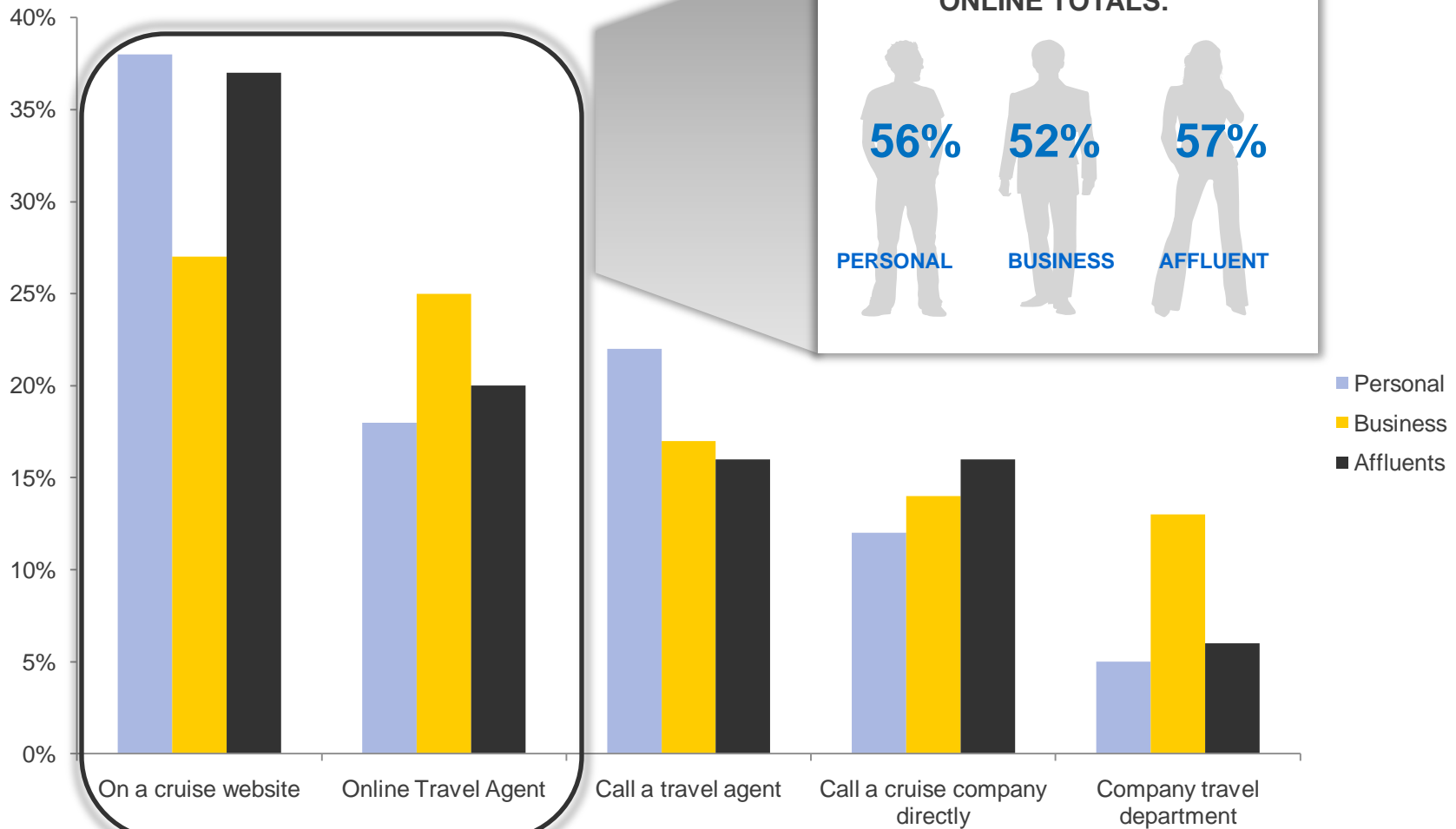
Surprisingly, Affluents are the Most Likely Segment to Do Cruise Comparison Shopping Online Before they Book

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(QW1) Which of the following sources, if any, do you typically use to learn about the cruises you've taken for personal travel? *Top 2 box summary

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When it Comes to Booking, Online is the Preferred Method Across All Segments



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(QR2) How do you typically book cruises for a personal/business trip?

What are the Most Important Factors When Choosing a Cruise Line?



1. **Price**
2. Destinations or routes available
3. Length of cruise
4. Past experience with cruise line
5. Type of accommodations available
6. Activities offered while onboard

PERSONAL



1. **Destinations or routes available**
2. Length of cruise
3. Type of accommodations available
4. **Price**
5. Past experience with cruise line
6. Activities offered while onboard

AFFLUENT

Top 6 List is the Same Across Both Segments; however, PRICE is most important for personal travelers and less important for affluent travelers.

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