



Cross Market Consumer Research *Germany*

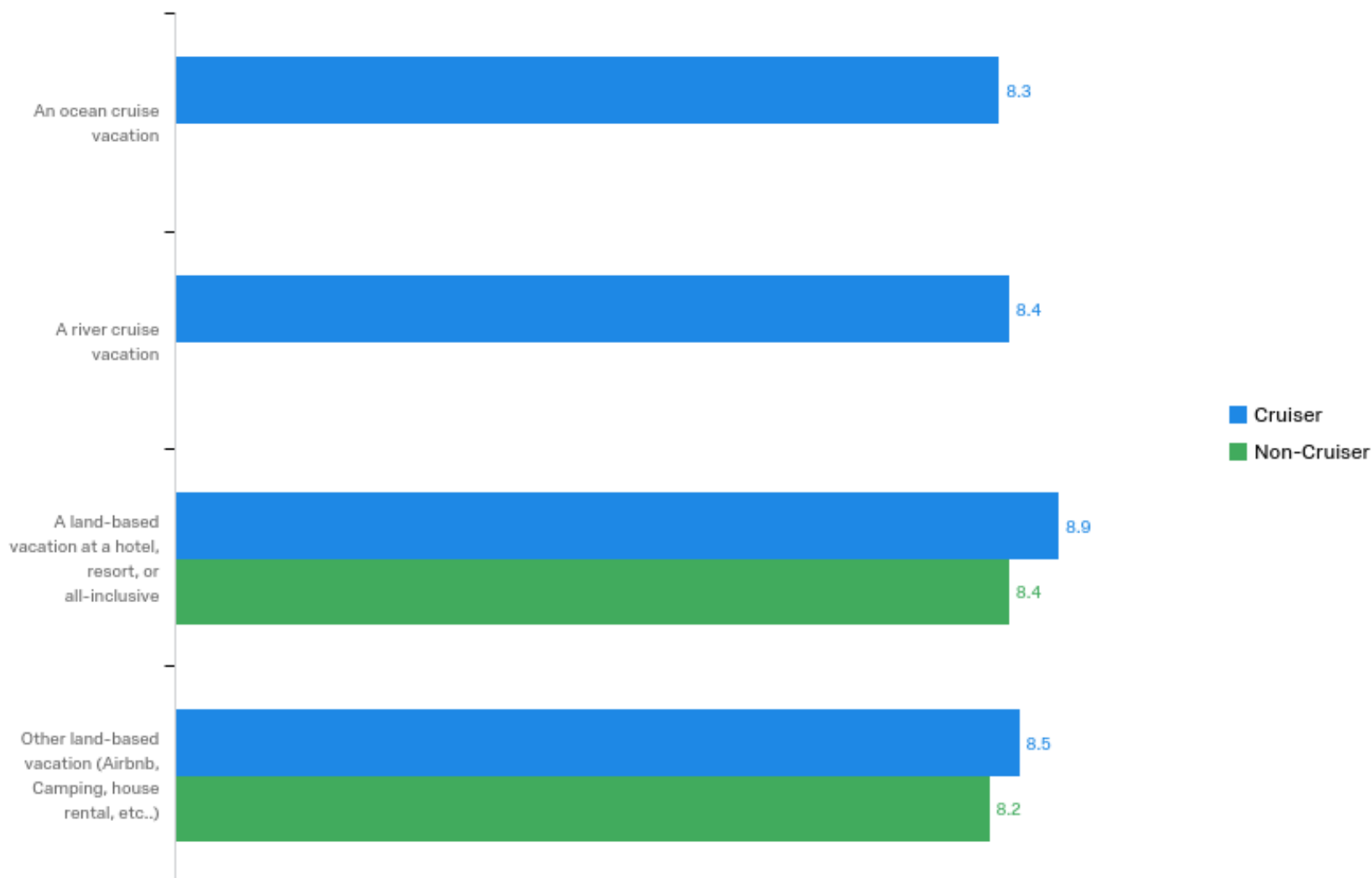
August 20th 2019

Q22 - Overall, how satisfied were you with your vacations in the past three years?

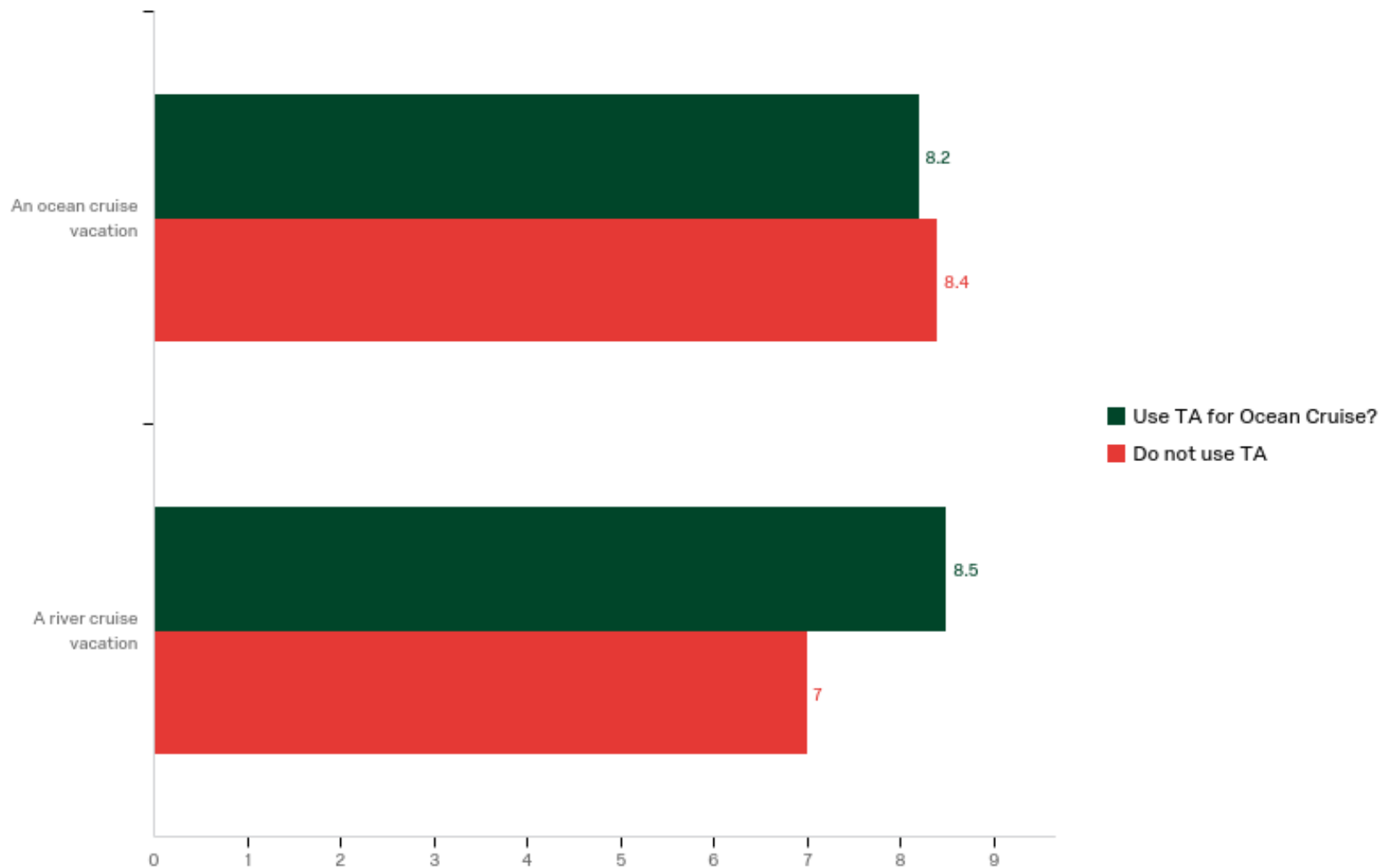
#	An ocean cruise vacation	Mean
3	A land-based vacation at a hotel, resort, or all-inclusive	8.46
1	An ocean cruise vacation	8.26
2	A river cruise vacation	8.39
4	Other land-based vacation (Airbnb, Camping, house rental, etc..)	8.22

Q22 - Overall, how satisfied were you with your vacations in the past three years?

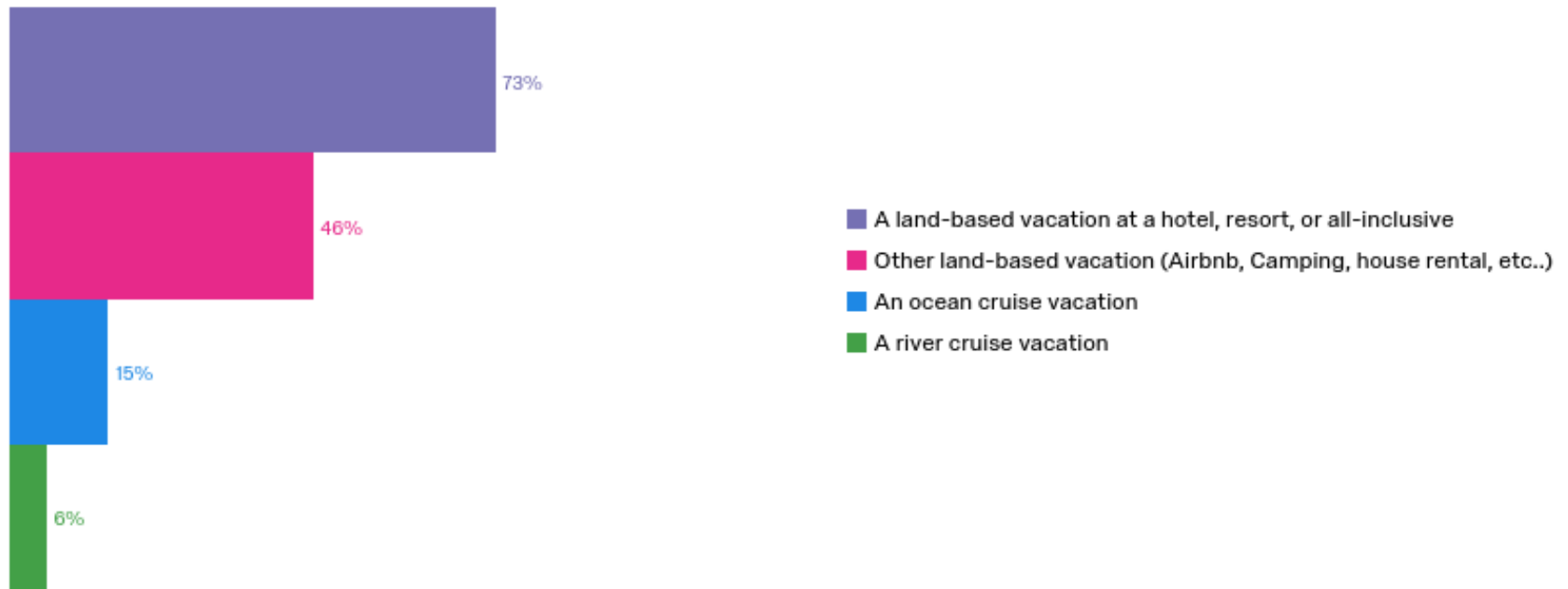
Average Vacation Satisfaction Level;



Q22 - Overall, how satisfied were you with your vacations in the past three years?



Q2 - In the past three years, have you taken any of the following vacations of at least 3 days? Mark all that apply.



Q7 - In planning your vacation, who primarily researches/gathers information?

Question	Self	My spouse/partner	Children under 18 years old	Adult children 18 years or older	Another family member	A friend	Travel agent	Other
An ocean cruise vacation	82%	10%	3%	0%	3%	0%	0%	2%
A river cruise vacation	74%	13%	0%	4%	0%	0%	9%	0%
A land-based vacation at a hotel, resort, or all-inclusive	82%	11%	0%	0%	3%	1%	1%	1%
Other land-based vacation	86%	8%	0%	1%	3%	1%	1%	1%

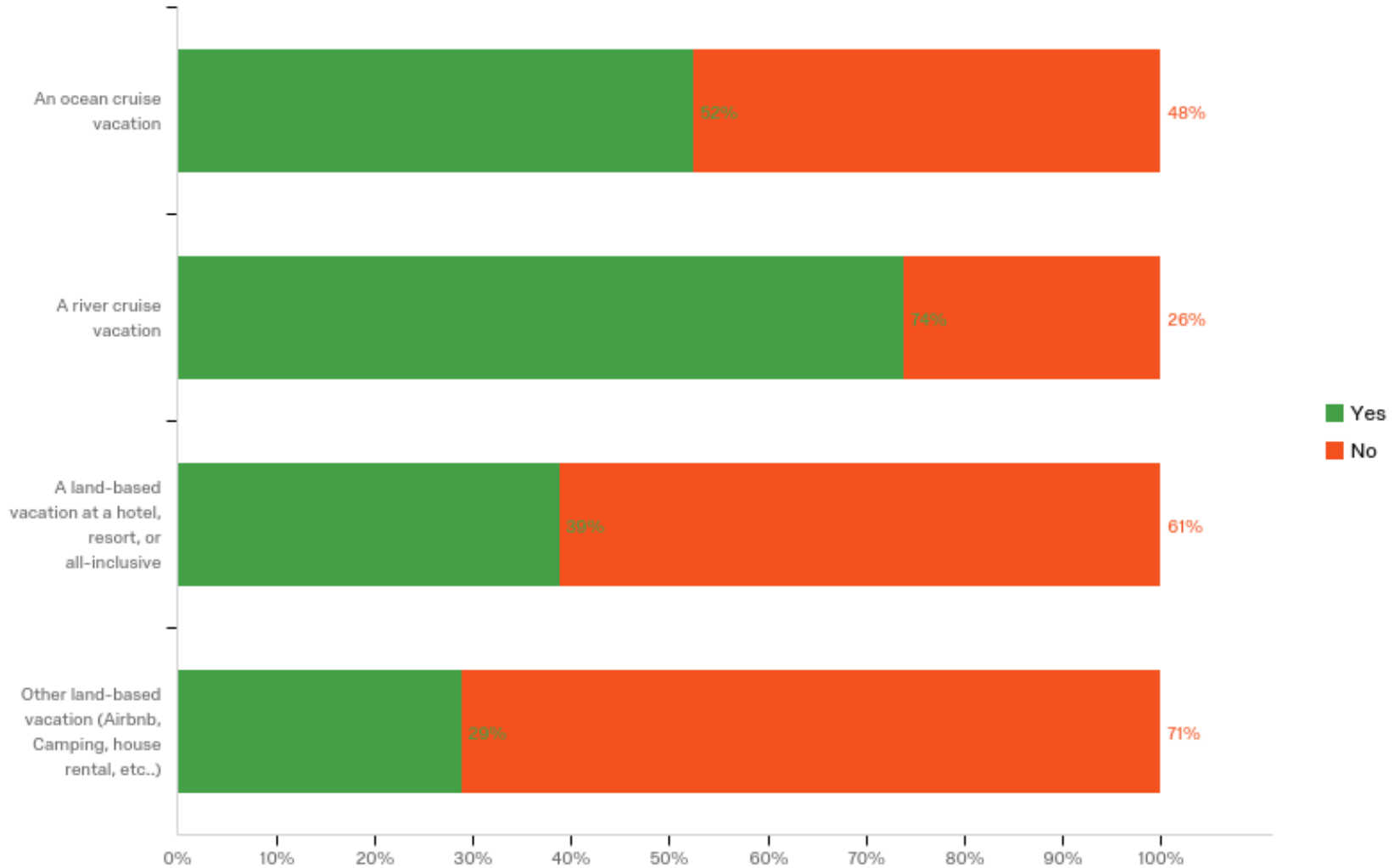
Q8 - When you plan/book a vacation, how often do you use a travel agent?

Question	Always	Most of the Time	Some of the Time	Never	Total
A land-based vacation at a hotel, resort, or all-inclusive	11%	17%	37%	35%	299
A river cruise vacation	26%	35%	35%	4%	23
An ocean cruise vacation	23%	23%	28%	26%	61
Other land-based vacation (Airbnb, Camping, house rental, etc..)	6%	10%	26%	58%	187

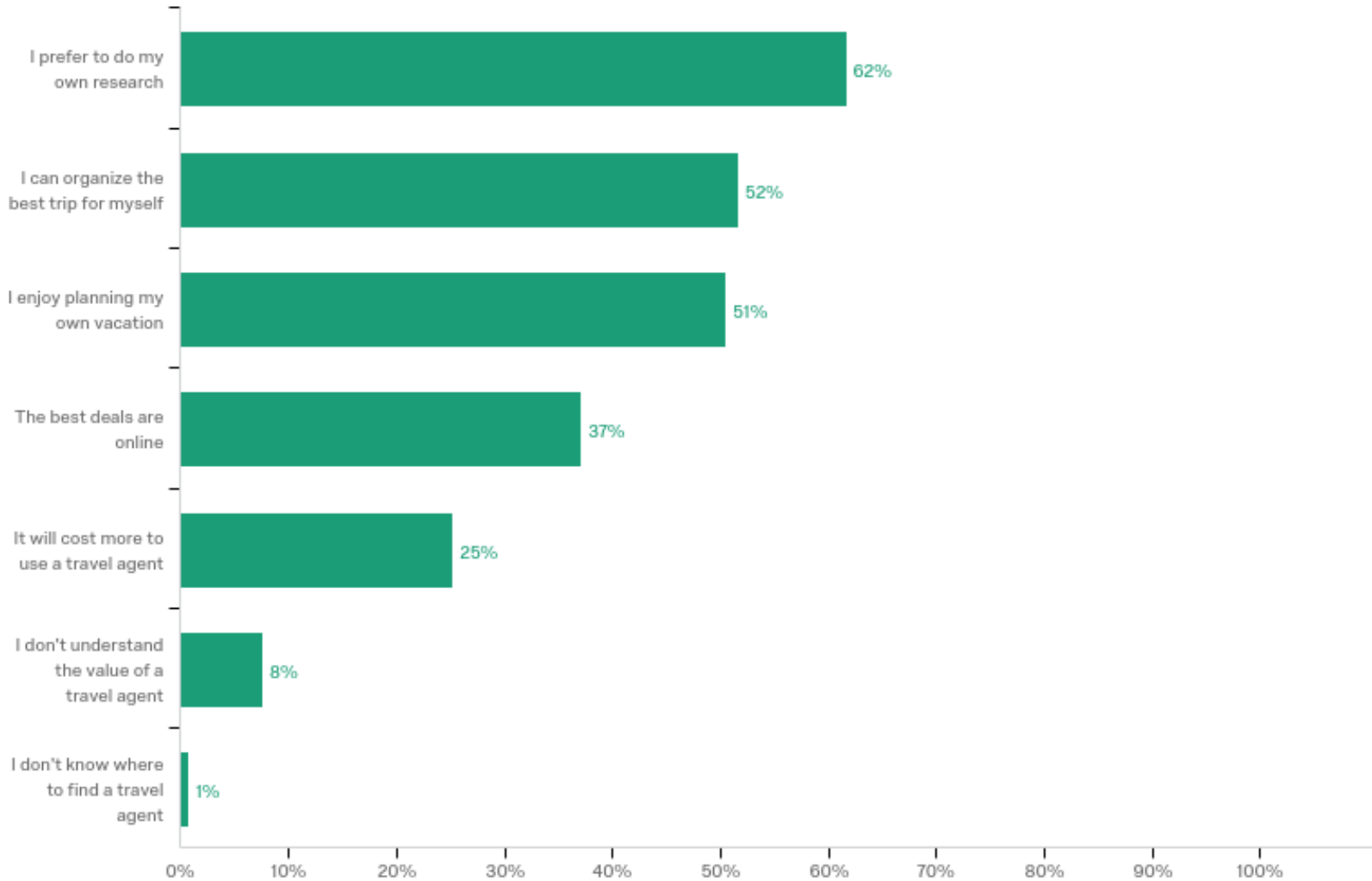
Q23 - The next time you plan a vacation, how likely are you to book a cruise vacation?

#	Question	Cruiser	Non-Cruiser
4	Definitely will	35%	4%
1	Definitely will not	4%	37%
3	Probably will	40%	18%
2	Probably will not	18%	33%
5	Unsure	3%	9%
	Total	72	336

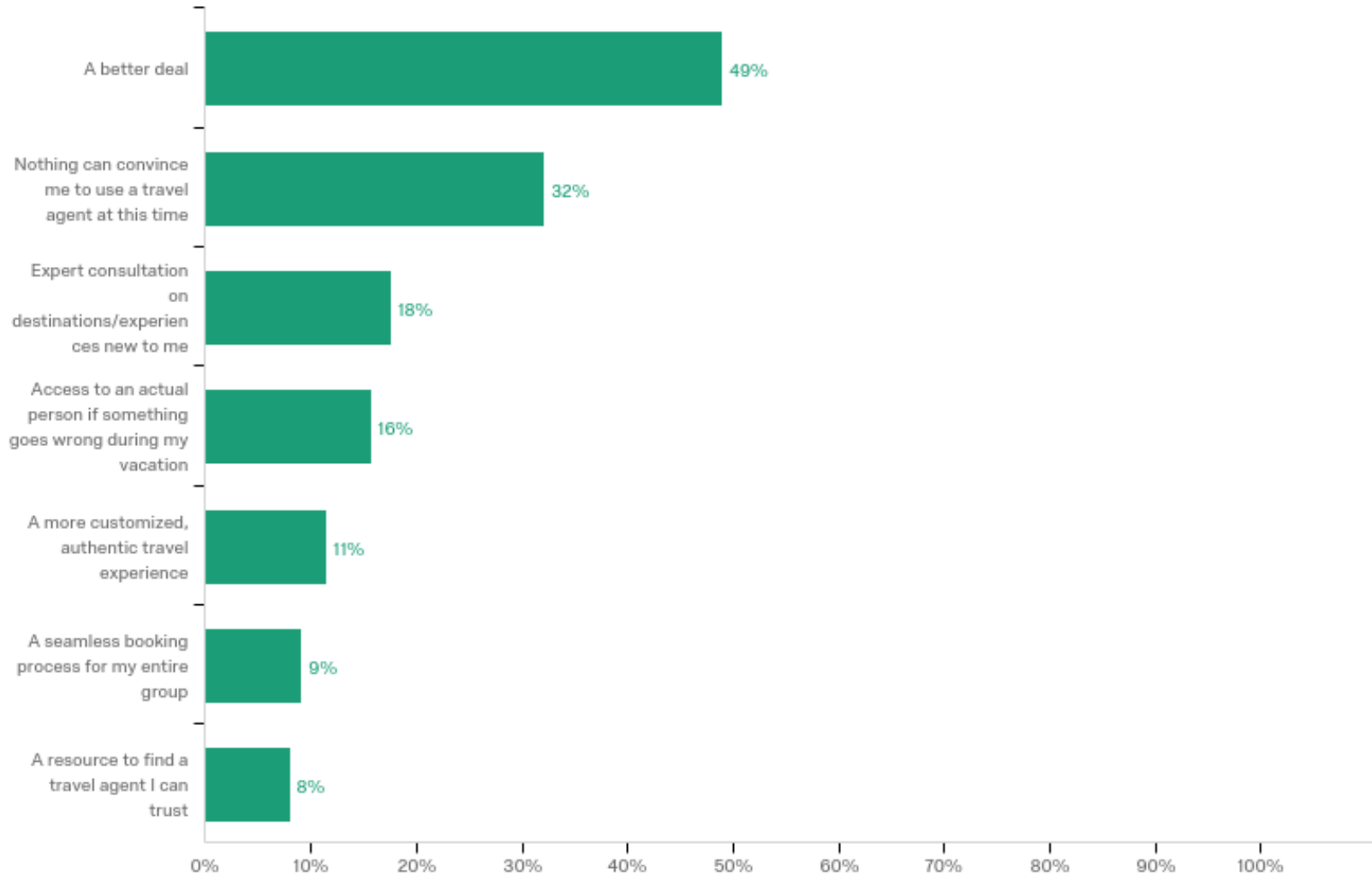
Q9 - For your next vacation, do you plan to use a travel agent?



Q10 - What is your primary reason for not using a travel agent to plan/book your next vacation? Mark all that apply Vacationers not planning on using a TA



Q11 - What would entice you to work with a travel agent to plan your next vacation? Vacationers not planning on using a TA



Q12 - What reasons do you have for using a travel agent to plan your next vacation? Vacationers planning on using a TA

#	Question	Cruiser	Non-Cruiser
3	Expert consultation on destinations/experiences new to me	19%	17%
7	Long-standing relationship with a travel agent	19%	23%
2	Access to an actual person if something goes wrong during my vacation	17%	21%
6	A seamless booking process for my entire group	16%	13%
1	A better deal	14%	11%
4	A more customized, authentic travel experience	13%	14%

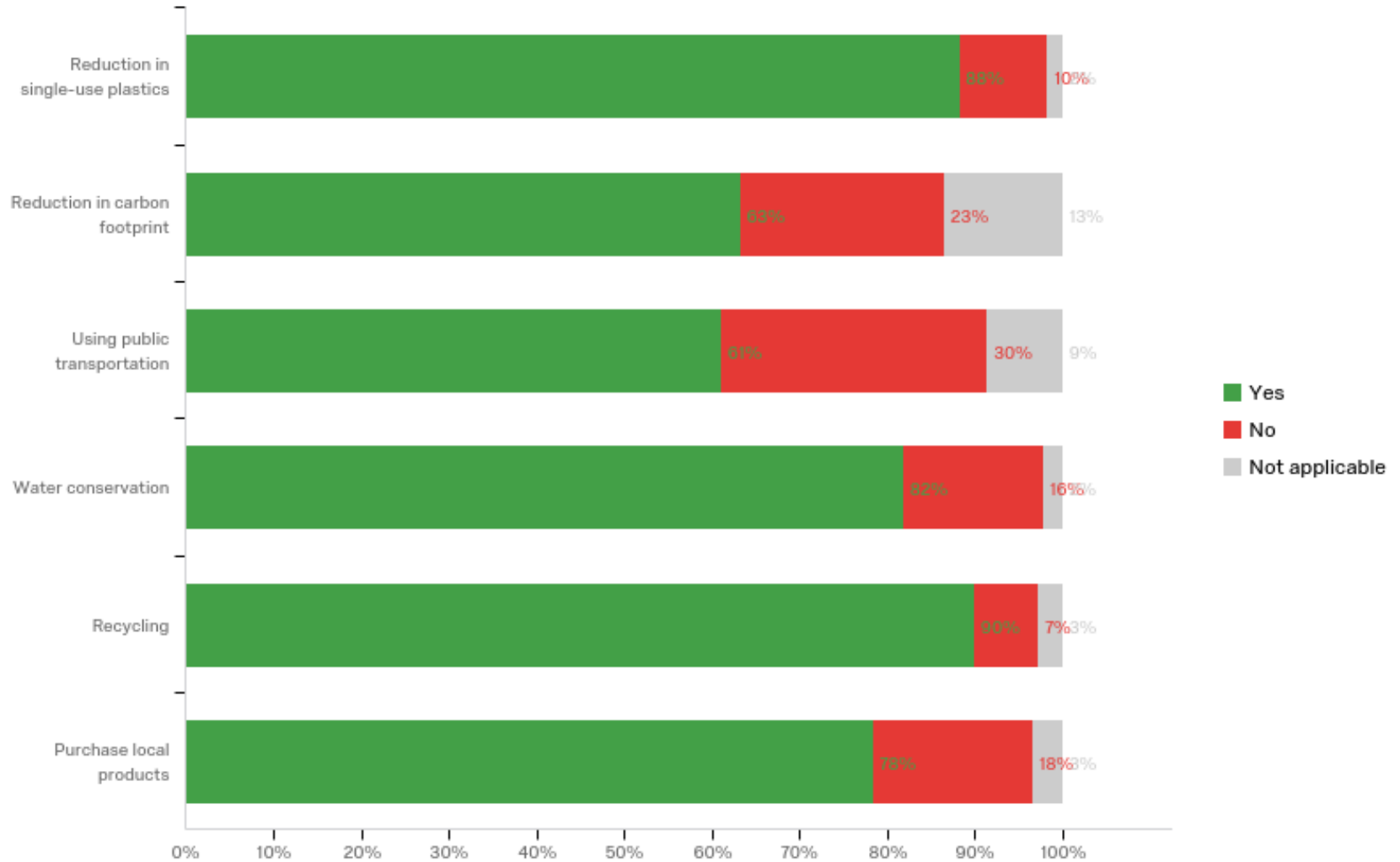
Q12 - What reasons do you have for using a travel agent to plan your next vacation? Vacationers planning on using a TA

#	Question	Cruiser	Non-Cruiser
	Total	104	218

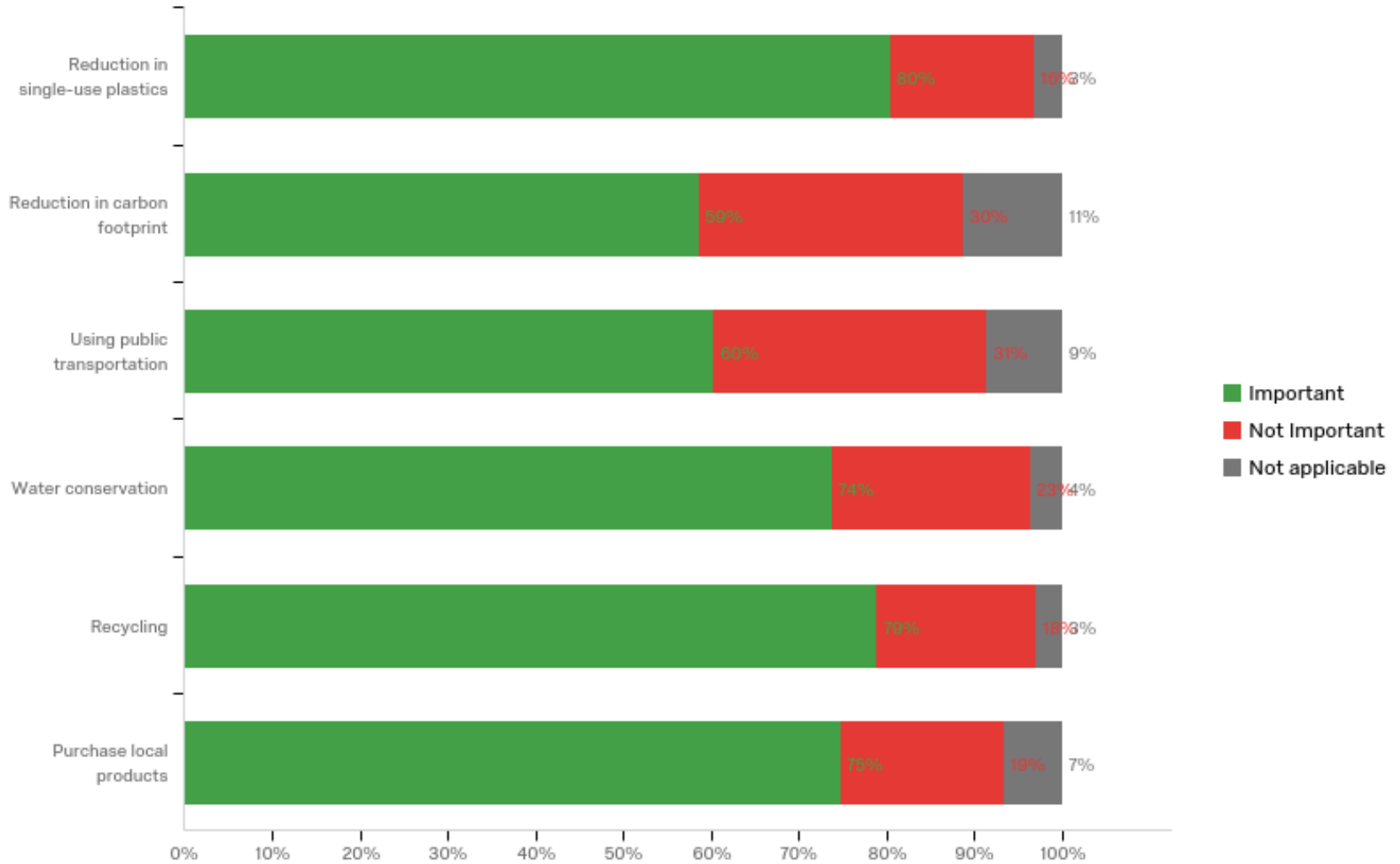
Q31 - What is your year of birth?

#	Field	Count
1	Traditionalist	17
2	Baby Boomers	151
3	Gen X	127
4	Gen Y	107
5	Gen Z	6

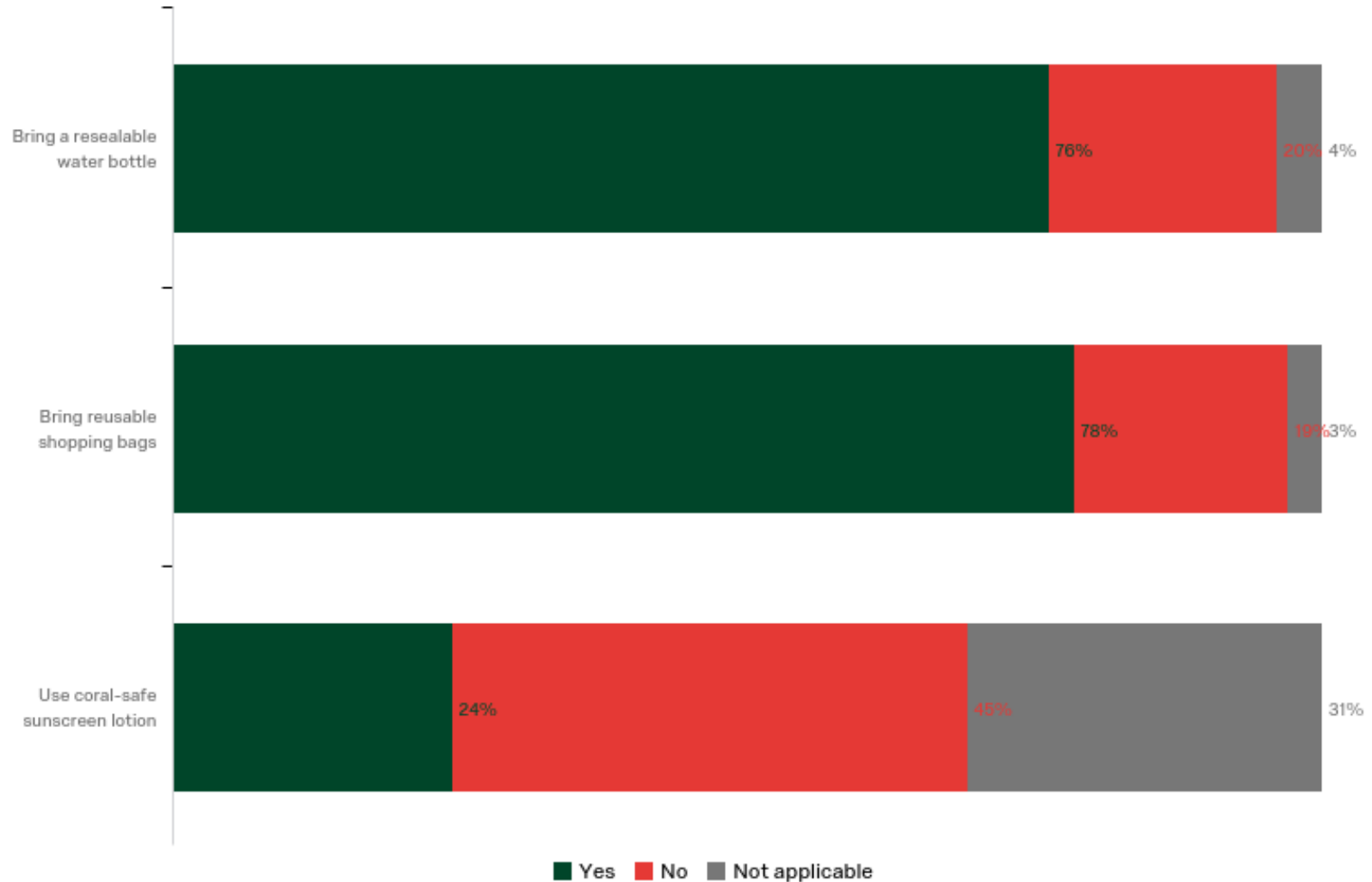
Q3 - Are these practices important in your daily life?



Q33 - Are these practices important to you while on vacation?



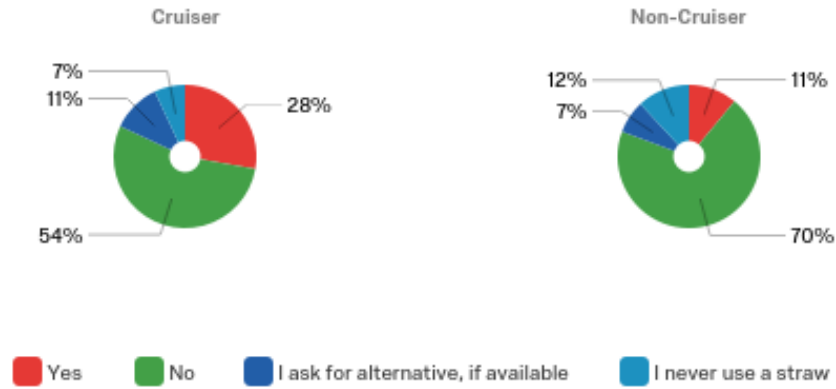
Q4 - When on vacation, will you...?



Q5 - How important is it for you that the destinations you visit while on vacation have recycling options?



Q6 - Do you take a plastic straw with beverages?



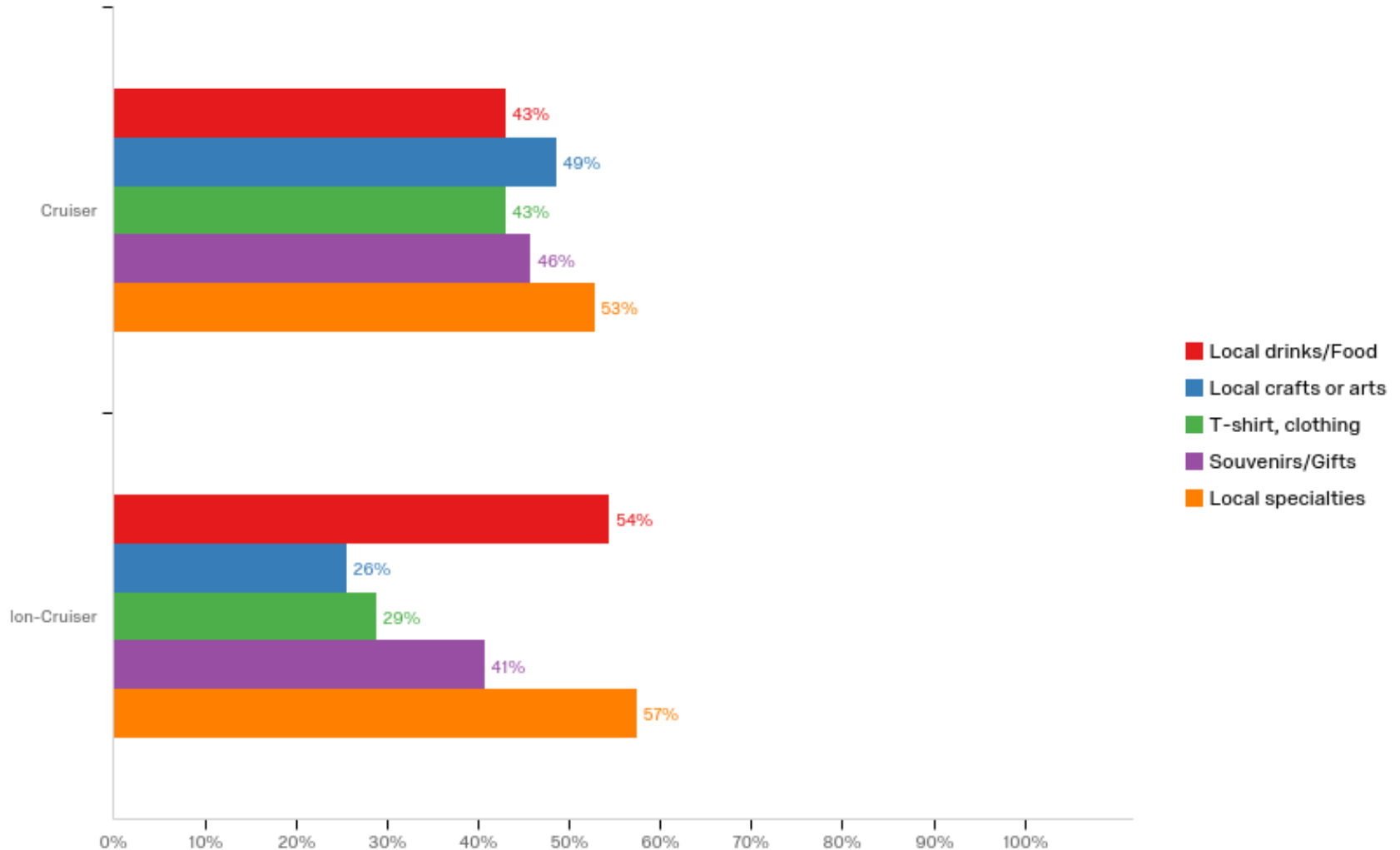
Q13 - Many elements are considered when selecting destinations for your vacation. Please select the top 3 factors that influence your decision to select a destination...

#	Question	Cruiser	Non-Cruiser
1	Cultural attractions	17%	16%
7	Opportunities to relax	16%	21%
8	Bucket list destination	14%	14%
2	Culinary experience	12%	13%
4	Outdoor activities	9%	12%
3	Shopping	8%	6%
6	Adventure activities	8%	5%
9	Accessibility	7%	3%
5	Family-friendly activities	6%	8%

Q13 - Many elements are considered when selecting destinations for your vacation. Please select the top 3 factors that influence your decision to select a destination...

#	Question	Cruiser	Non-Cruiser
10	Instragrammable travel	2%	2%
	Total	216	1008

Q14 - Which of the following do you prefer to purchase when you visit a destination?



Q15 - Do you consider cruise vacations a good way to sample destinations that you may wish to visit again on a non-cruise vacation?

Cruisers Only

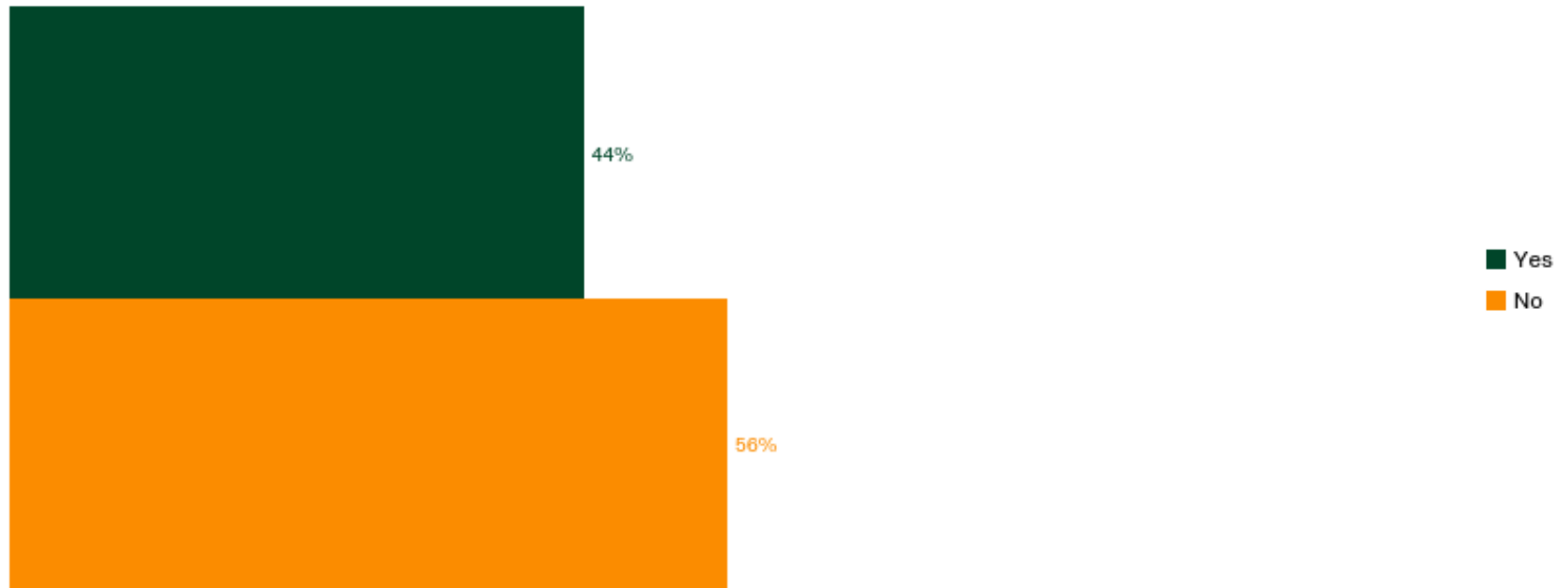


■ Yes ■ No

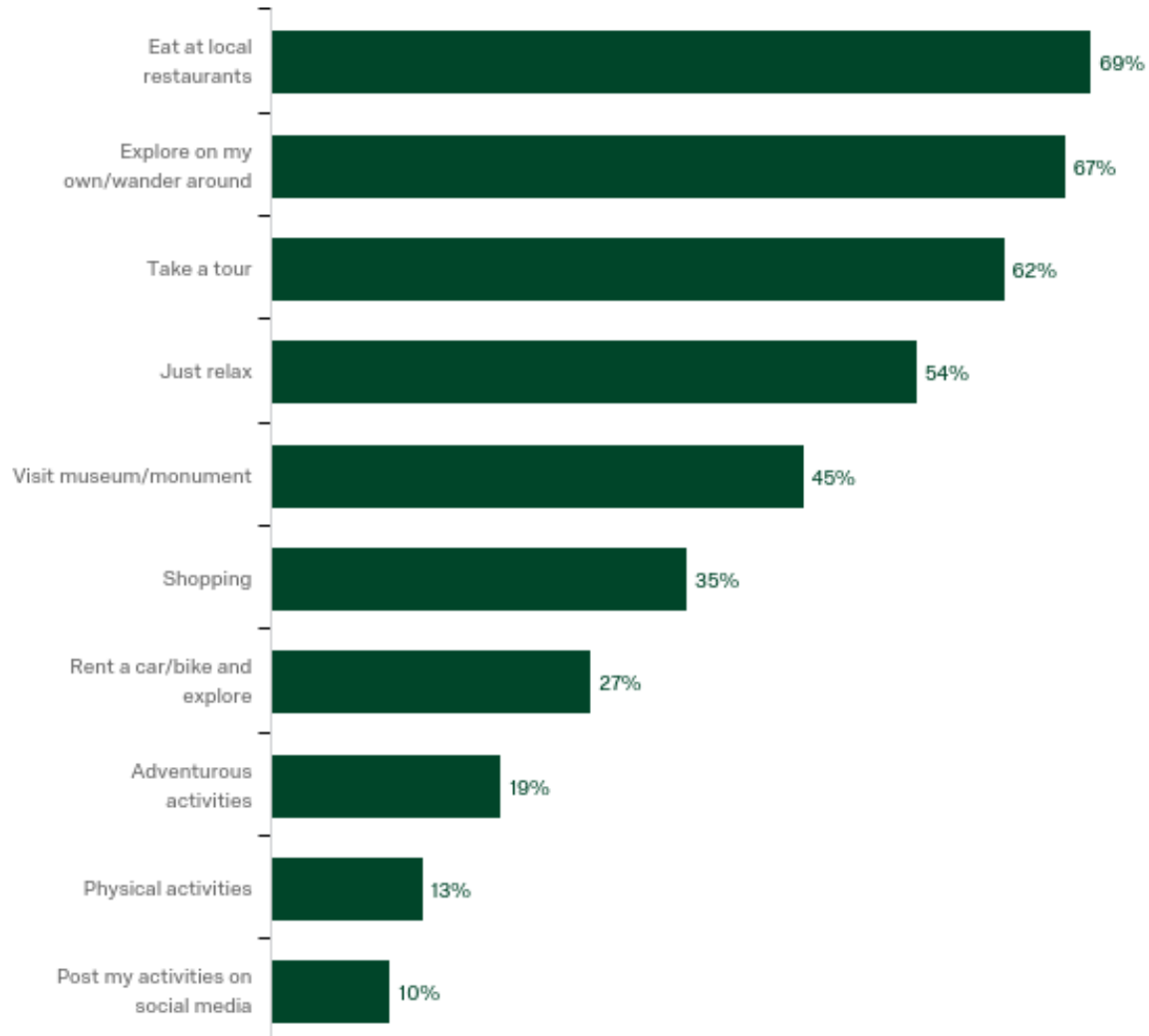
Q16 - Have you ever returned to a destination that you first visited by cruise ship? Cruisers only



Q17 - When choosing a cruise vacation, do you typically extend your vacation by spending a few days in the embarkation/debarkation port city? Cruisers only



Q18 - In which activities do you engage when you visit a destination for a day or two, while on vacation? Select all that apply



Q47 - Which of the following destinations are on your bucket list?

#	Question	Cruiser	Non-Cruiser
16	Australia	17%	16%
6	Greek Isles	14%	19%
7	Hawaii	14%	17%
1	Alaska	10%	6%
4	British isles and Northern Europe	9%	13%
5	Galapagos Islands	9%	6%
9	Tahiti/Bora Bora & South Pacific	9%	10%
3	Baltics	8%	8%
2	Antarctica and Artic	6%	3%
8	Panama Canal	4%	2%

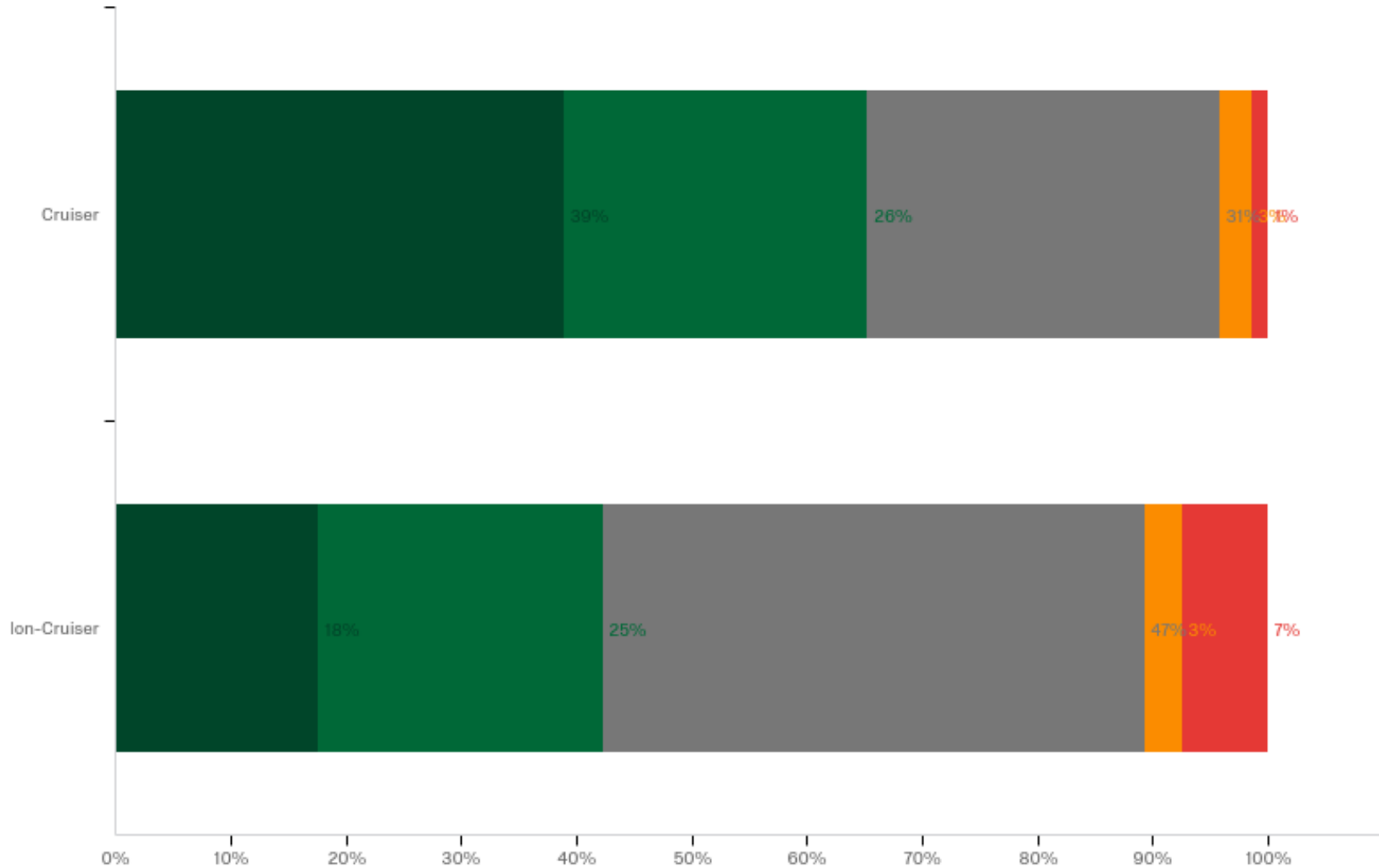
Q47 - Which of the following destinations are on your bucket list?

#	Question	Cruiser	Non-Cruiser
	Total	218	639

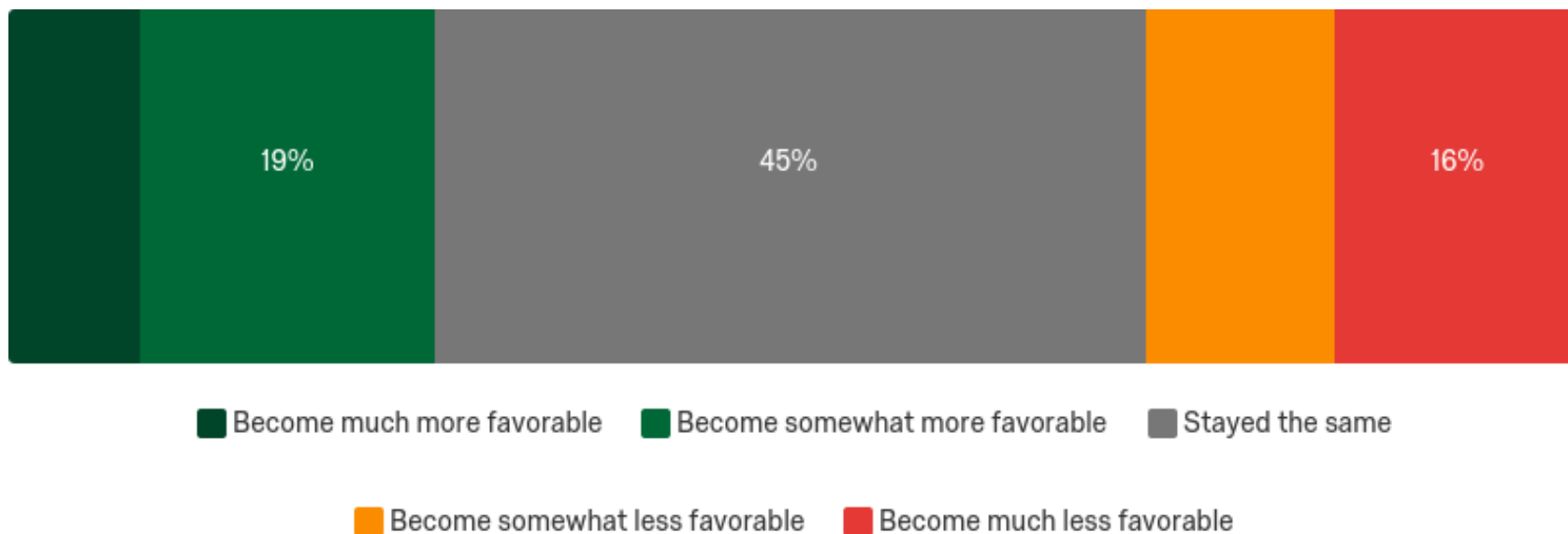
Q19 - In the past year or two, has your overall awareness of cruise vacations...?



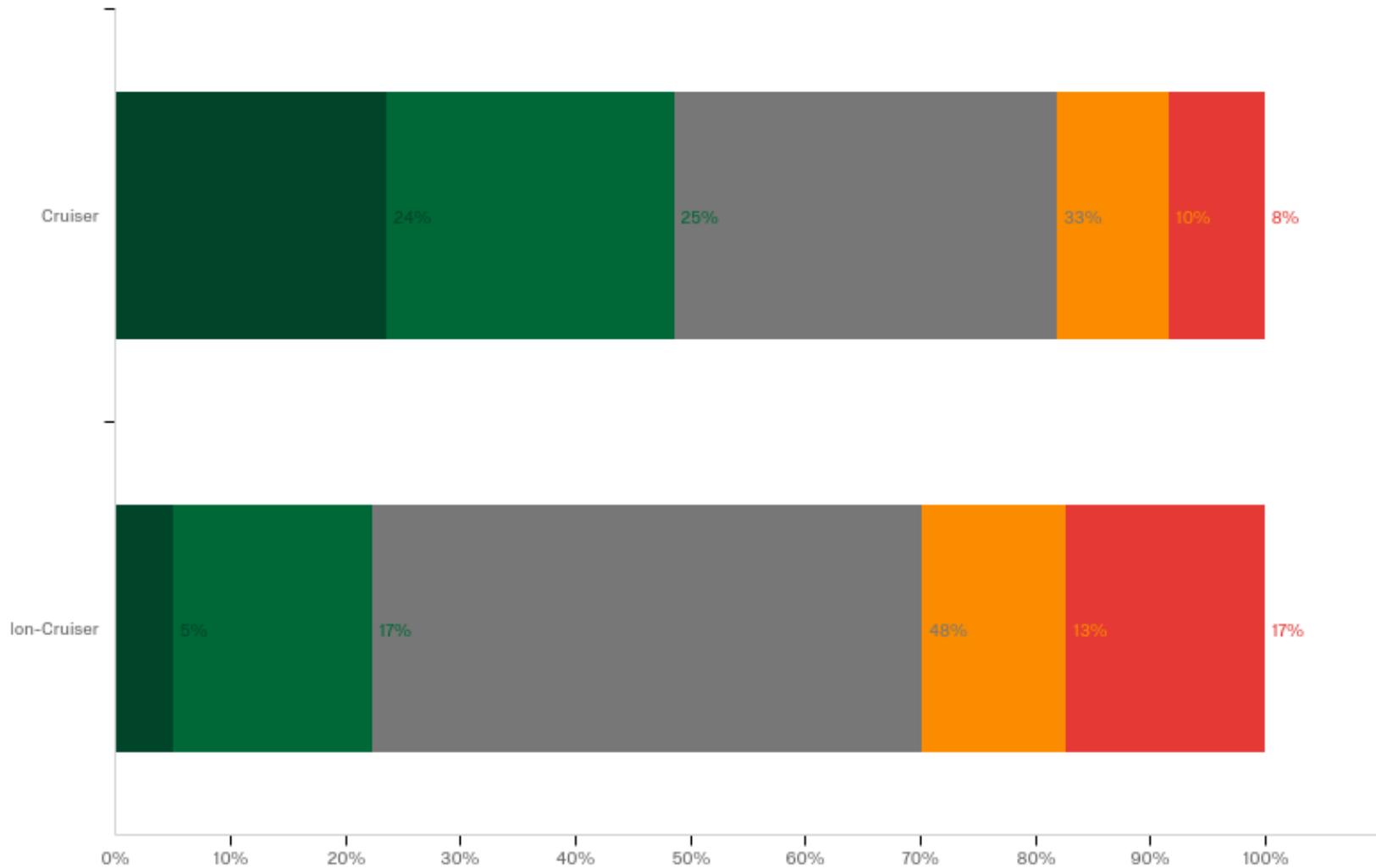
Q19 - In the past year or two, has your overall awareness of cruise vacations...?



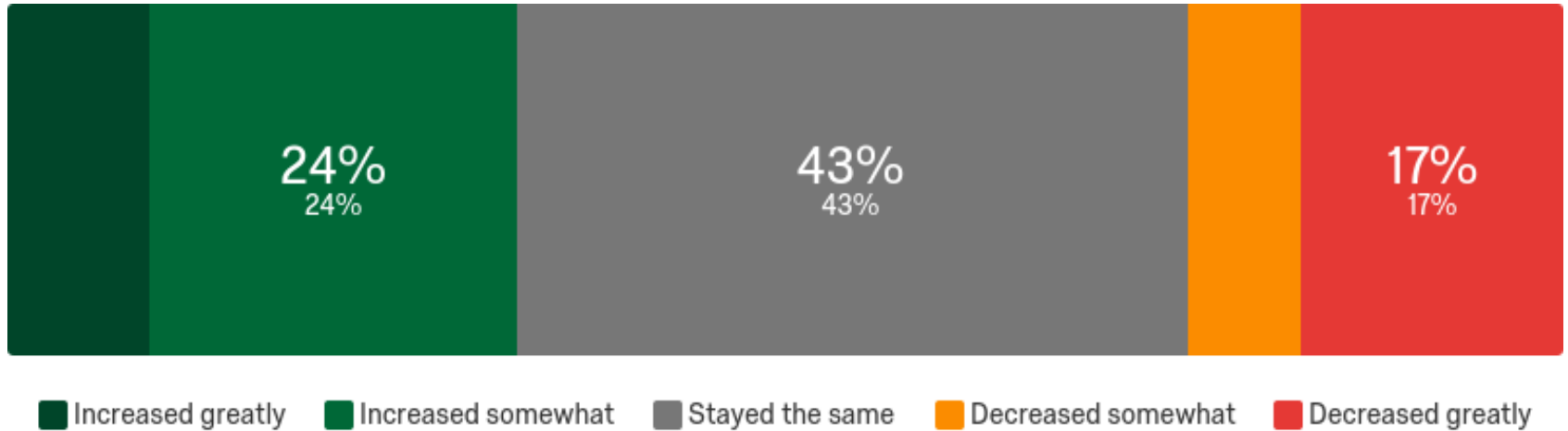
Q20 - In the past year or two, has your attitude toward cruise vacations..?



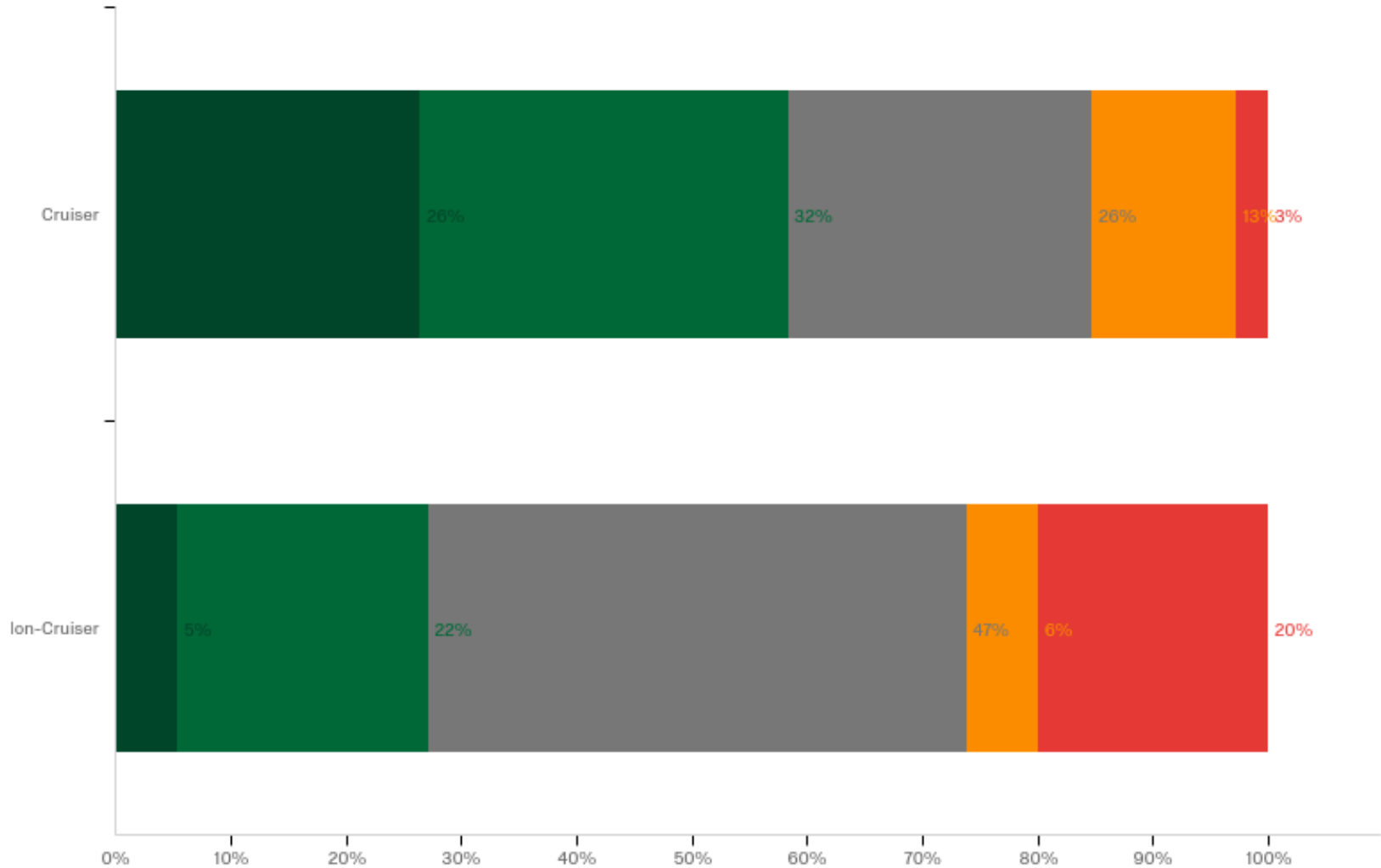
Q20 - In the past year or two, has your attitude toward cruise vacations..?



Q21 - In the past year or two, your interest in taking a cruise vacation...?



Q21 - In the past year or two, your interest in taking a cruise vacation...?



Q24 - Are cruises better or worse than your land-based vacations in term of the following..?

Cruisers only

Question	Better	Worse	Total
Participation in sports you enjoy	68%	32%	72
Offers something for everyone	85%	15%	72
Being hassle free	74%	26%	72
Comfortable accommodation	68%	32%	72
Having good activities for children	68%	32%	72
Relaxing and getting away from it all	76%	24%	72
Being luxurious	81%	19%	72
Variety of activities	76%	24%	72

Q24 - Are cruises better or worse than your land-based vacations in term of the following..?

Cruisers only

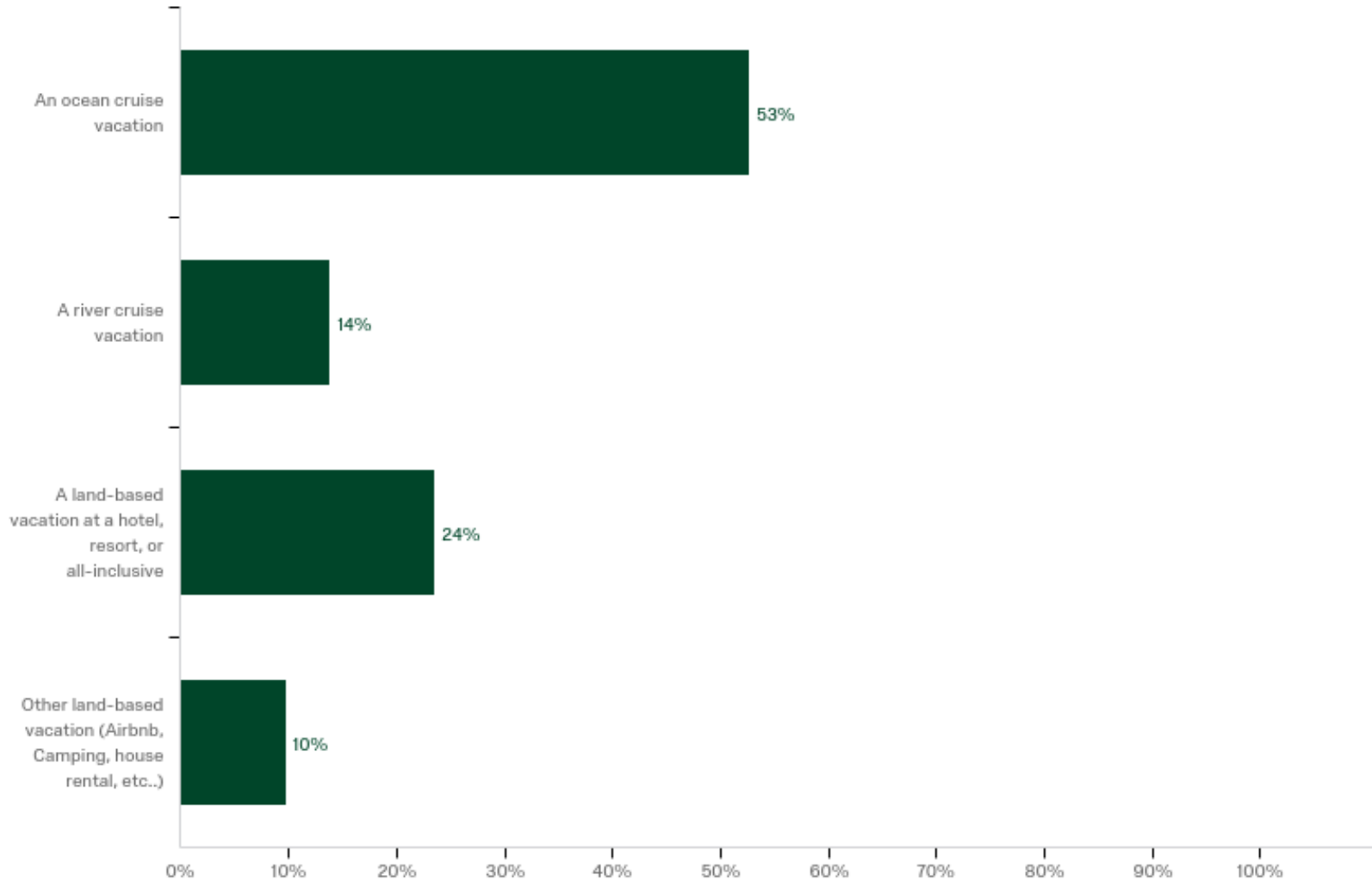
Question	Better	Worse	Total
Being exciting and adventurous	76%	24%	72
Good value for the money	63%	38%	72
Being easy to plan and arrange	81%	19%	72
High quality entertainment	78%	22%	72
Fine dining	85%	15%	72
Good vacation for the entire family	72%	28%	72
Being unique and different	76%	24%	72
Being reliable	86%	14%	72

Q24 - Are cruises better or worse than your land-based vacations in term of the following..?

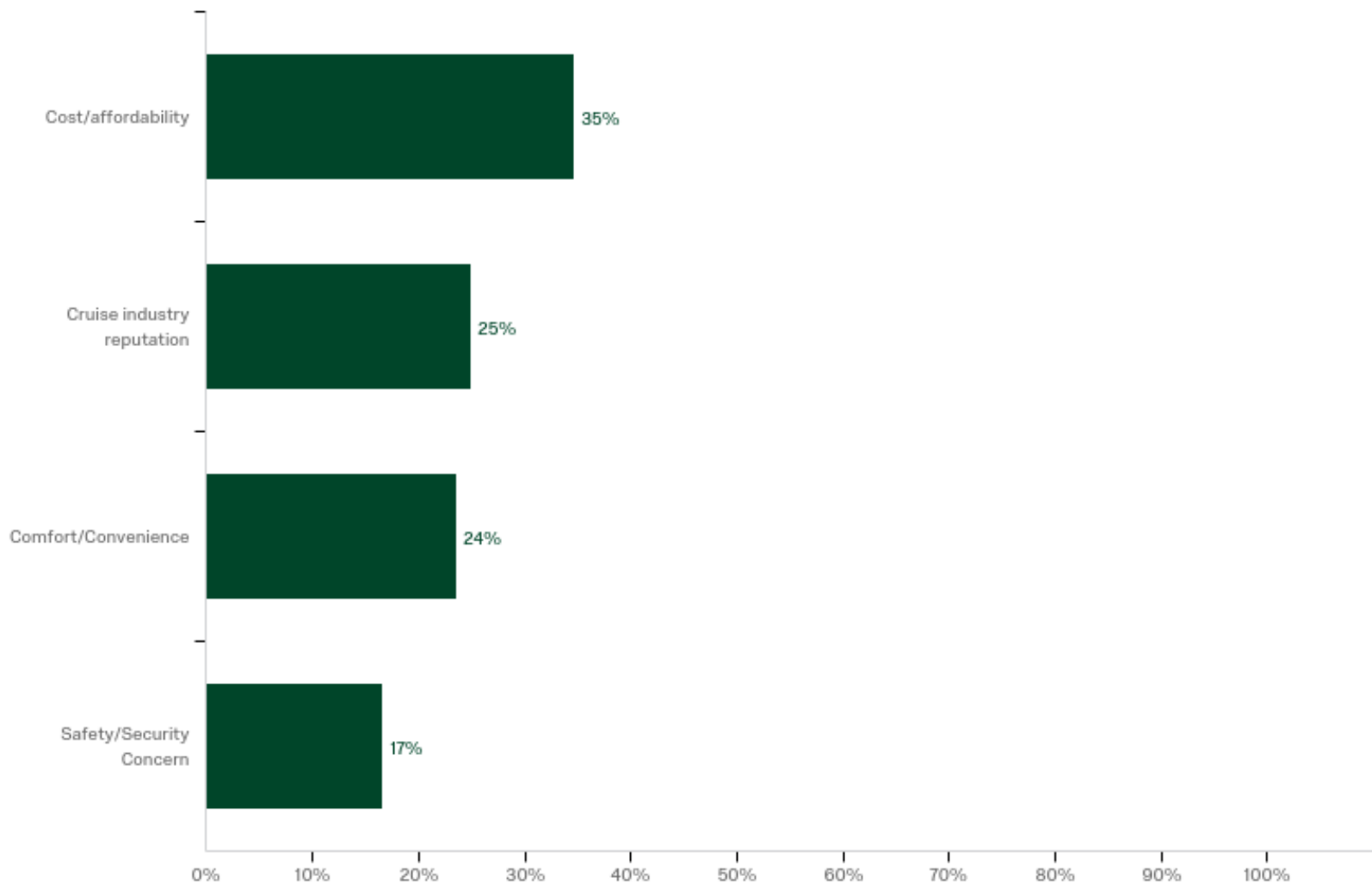
Cruisers only

Question	Better	Worse	Total
Being safe	75%	25%	72
Being pampered	83%	17%	72
A cultural learning experience	71%	29%	72
Romantic getaway	68%	32%	72
Fun vacation	74%	26%	72
Chance to visit several destinations	85%	15%	72

Q25 - In your opinion, what vacation type do you consider to be the best overall vacation? Cruisers only



Q26 - Which of the following reasons best describe why you would choose a different type of vacation instead of cruising? Cruisers only



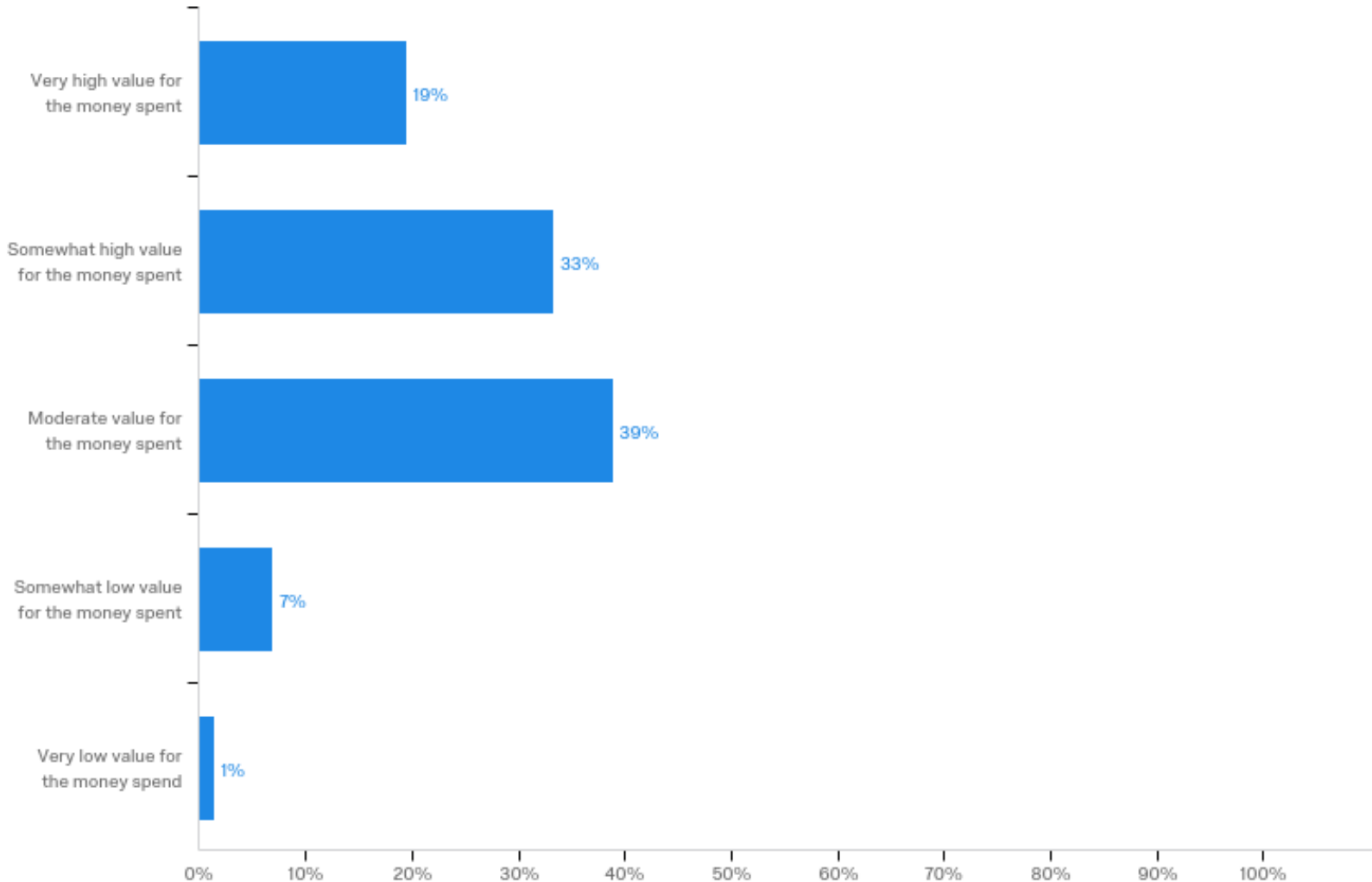
Q27 - Please rate the following attributes on how they influenced your most recent cruise vacation purchase using the 10 point scale.

Question	1- Least influence	2	3	4	5	6	7	8
Convenience	1%	1%	0%	1%	4%	17%	13%	22%
Sightseeing opportunities/Excursions	1%	0%	1%	6%	4%	10%	15%	21%
Trip ports and destinations	3%	0%	1%	1%	7%	10%	8%	15%
Availability of suites	17%	8%	4%	3%	4%	10%	13%	13%
Specialty dining	6%	3%	1%	1%	18%	14%	11%	24%
Programs for children	25%	8%	1%	1%	10%	10%	3%	24%

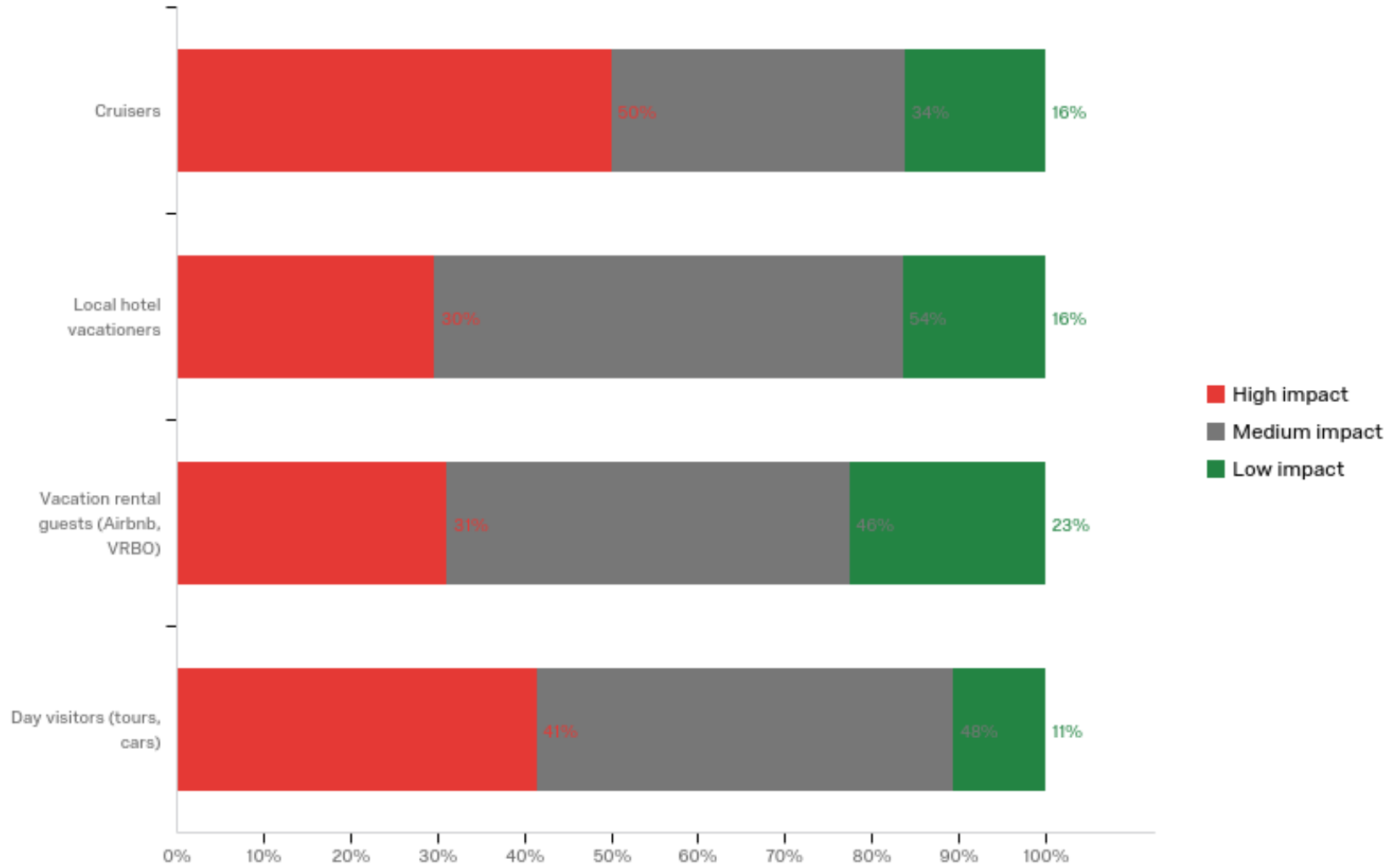
Q27 - Please rate the following attributes on how they influenced your most recent cruise vacation purchase using the 10 point scale.

Question	1- Least influence	2	3	4	5	6	7	8
Trip itinerary/ days at sea	1%	1%	1%	0%	7%	11%	15%	15%
Price/Value	0%	1%	1%	3%	8%	10%	19%	24%
Cruise line brand	1%	0%	0%	1%	11%	11%	13%	19%
Cruise ship size	8%	3%	3%	4%	6%	11%	17%	19%

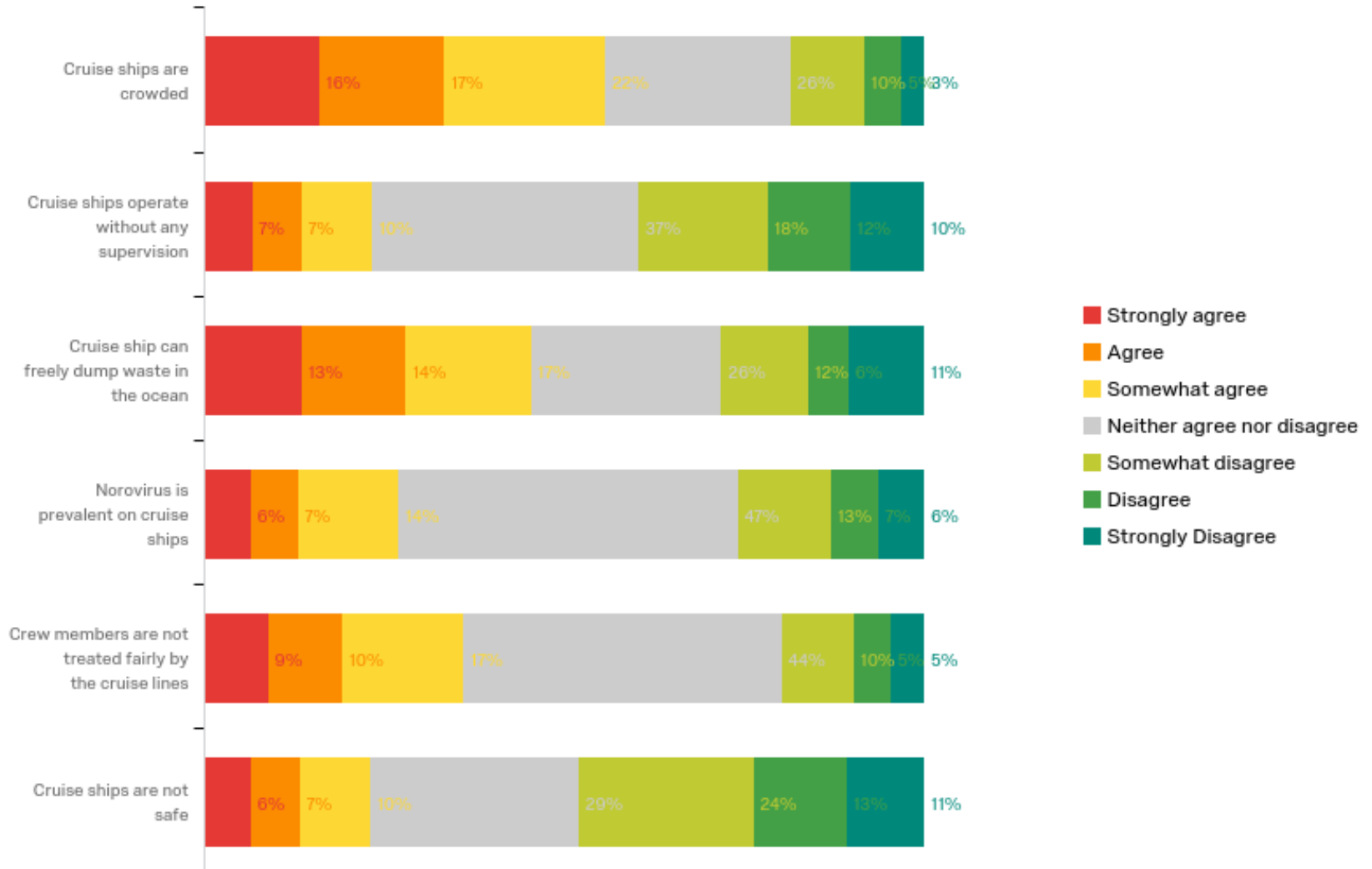
Q28 - When considering the price of a cruise versus land-based vacations, how do you rate the overall value received? Cruisers only



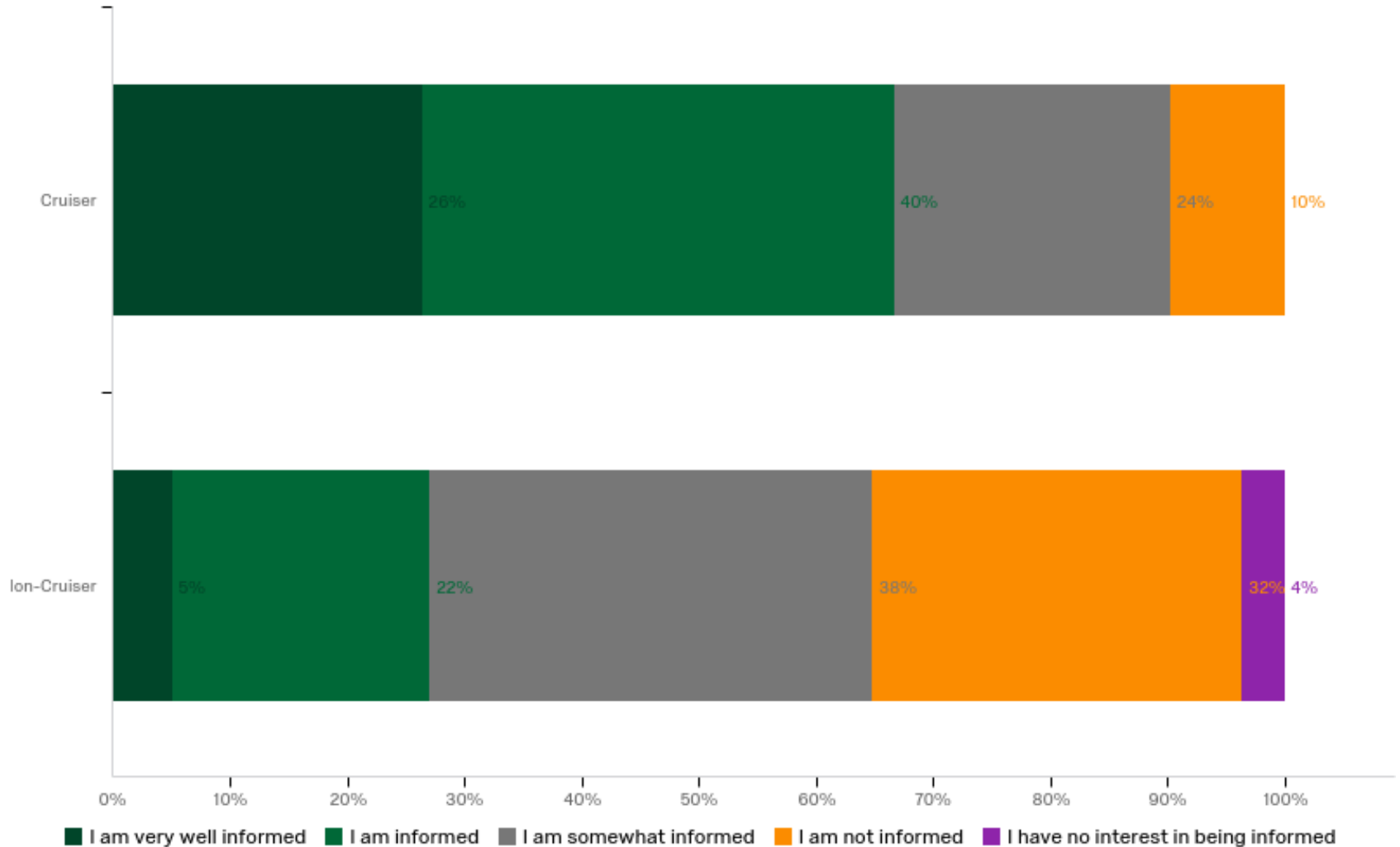
Q29 - What level of impact do you think the following groups have on tourist congestion in cities such as Venice, Barcelona, Amsterdam?



Q30 - What is your level of agreement with the following statements?



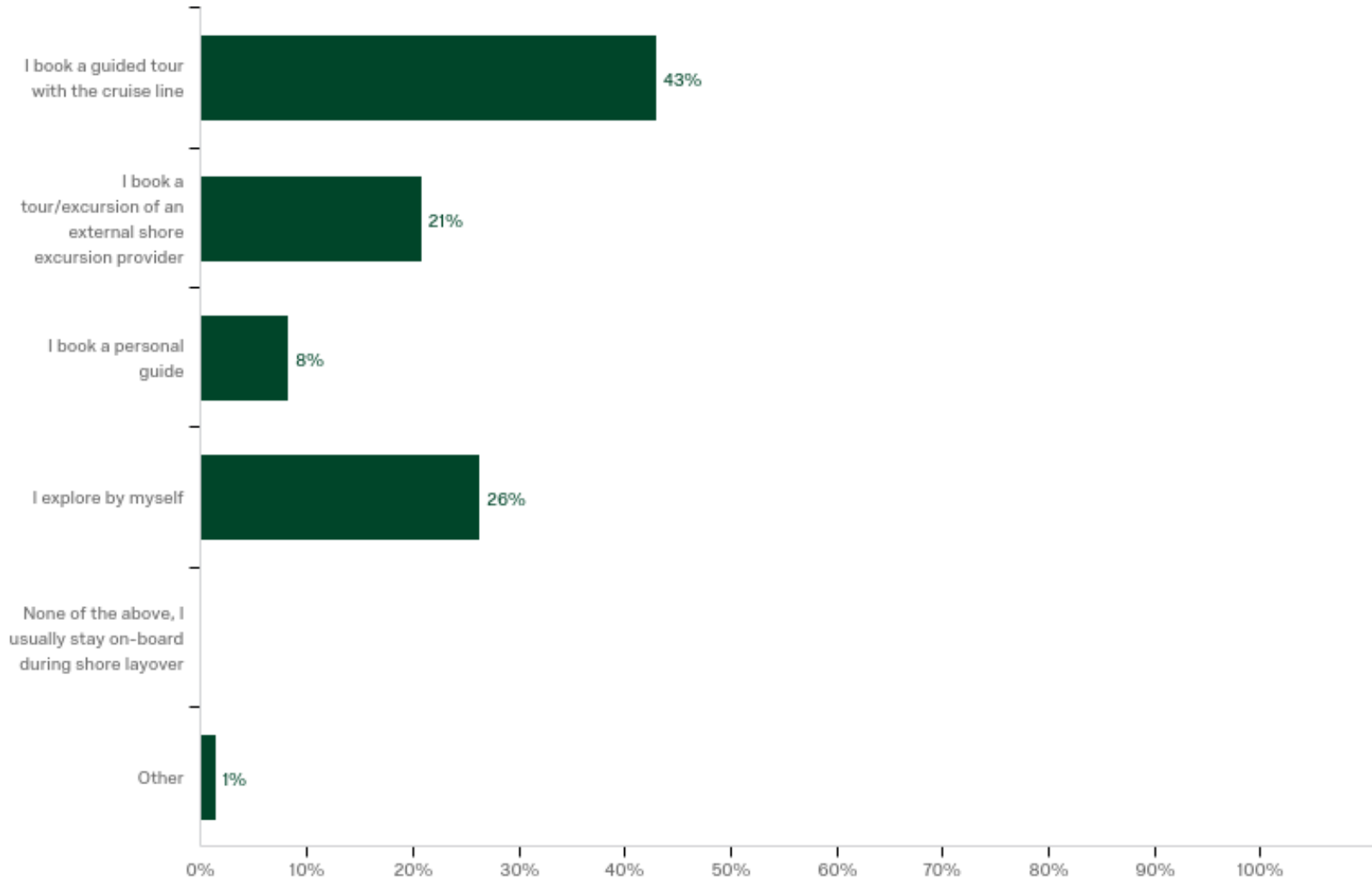
Q53 - How well informed do you consider yourself about the cruise lines sustainability efforts?



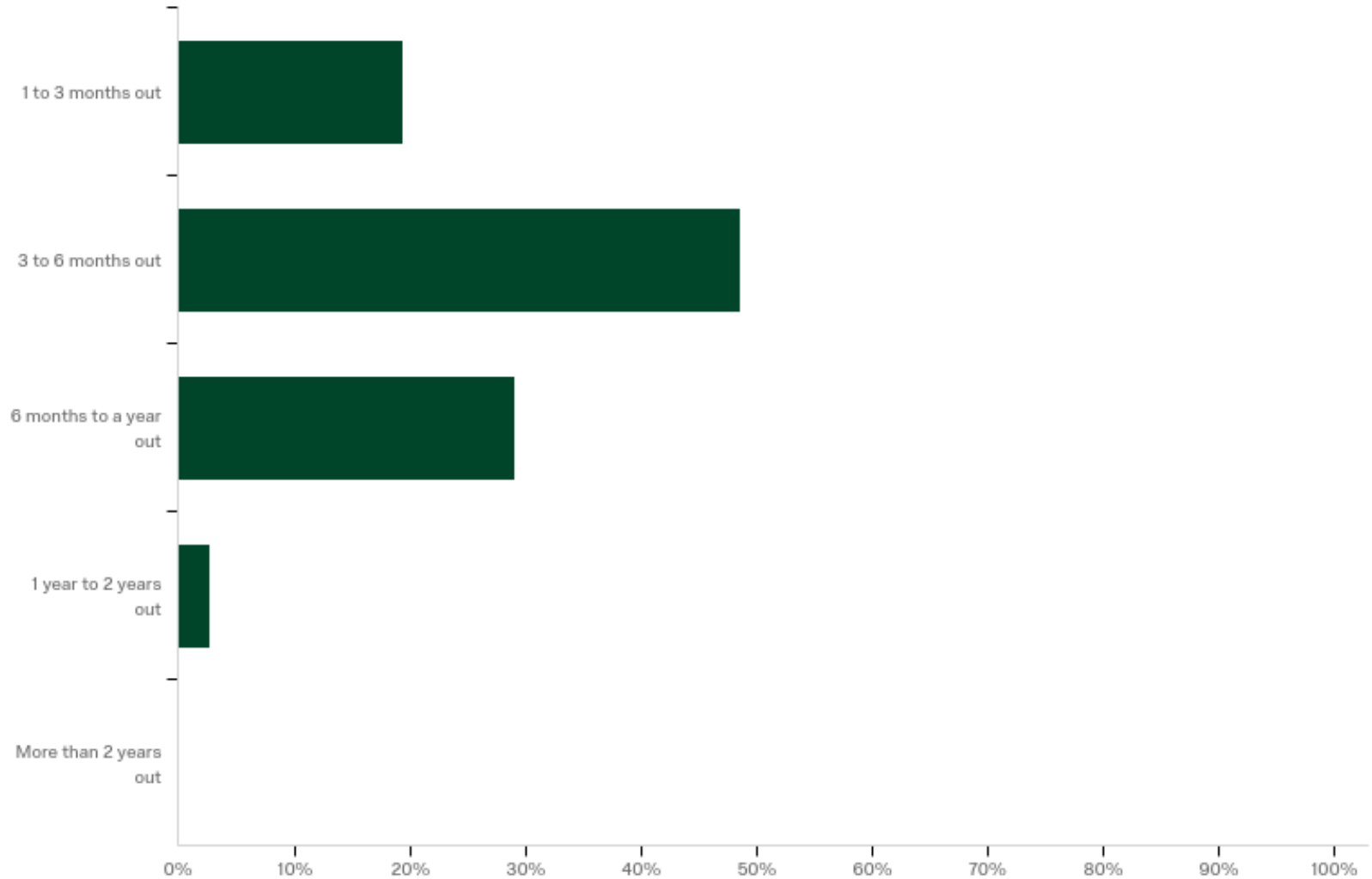
Q48 - When you plan or book a vacation, what are you preferred booking channels? German Vacationers

Question	An ocean Cruise vacation	A river cruise vacation	A land-based vacation at a hotel, resort, or all-inclusive	Other land - based vacation (AirBnb, Camping, House rental etc..)	Total
Tour operator/cruise line	45%	20%	15%	20%	408
Travel agent	17%	28%	33%	22%	408
Online portals/internet	10%	13%	45%	32%	408
Does not apply	27%	30%	12%	31%	408

Q50 - When visiting a destination by cruise ship, how do you like discovering the destination? German Cruisers



Q49 - When choosing a cruise vacation, how far in advance do you book? German Cruisers



Q59 - Please indicate the answer that includes your entire household income in (previous year) before taxes.

#	Question	Cruiser	Non-Cruiser
1	€44,999 or less	26%	47%
4	€45,000 to €89,999	43%	34%
5	€90,000 to €129,999	18%	7%
6	€130,000 to €174,999	0%	3%
7	€220,000 or more	4%	1%
8	I do not want to answer	8%	8%
	Total	72	336

Q44 - When do you plan to take a cruise?

Limited Sample

