Cruising has always provided an exceptional value proposition and has wide consumer appeal where there is an experience for every generation—from kids’ clubs to onboard entertainment designed to appeal to teens and adults. While some travelers might choose the alternative land-based hotel and resort vacations, cruising offers a broad range of products, services, and vacation experiences to suit travelers of many ages, backgrounds, and interests.

As the COVID-19 pandemic began to sweep across the globe it has had a devastating impact on the global travel & hospitality industry and, in particular, the cruise industry—resulting from early widespread negative media coverage.

There is one thing we know for certain, cruisers do want to cruise. In a 2019 survey, 82% of cruisers were likely to book a cruise as their next vacation. That kind of passion isn’t likely to disappear overnight, regardless of a global health crisis. However, we also know they want cruises to be safe.

In a 2020 Deloitte safety survey, 86% said that a certification of cleanliness from a trusted authority would make them feel more comfortable as they returned to travel.

As we have stated before, we think the best way to predict and understand a customer’s future behavior is by understanding what matters to them most—their values. We decided to look at cruisers’ values year over year to assess if there were any shifts in what drives these customers and to hopefully shed some light on what that would mean for cruise companies, the industry, and future outlook.
Our proprietary HX™ Values Compass is built on an algorithm that uses targeted questions to map humans against eight cardinal values: ambition, trying new things, curiosity, sharing with others, belonging, caring for others, control, and learning new things.

We looked at the values of travelers who said they have taken a cruise in the last 12 months and who indicated they are customers of the following cruise brands: Celebrity, Holland America, Princess, Viking Ocean Cruises, Carnival, Norwegian, and Royal Caribbean. Recognizing that these cruise companies deliver different experiences and cater to different clientele, we also split the group into three broad cruise segments. Specifically: contemporary, premium, and luxury cruise itineraries. At a high level, values across the segments moved uniformly away from trying new things toward caring for others and sharing with others—values we believe will be necessary as the cruise experience shifts in the new normal.

What did we find?
We found 2019 values across the contemporary, premium, and luxury segments to be only slightly different from each other, as the customers who sail on these cruises are comprised of slightly different cruise travelers seeking different experiences. There were nuanced differences as premium cruise travelers aligned more strongly with control, valuing duty above desire while contemporary cruise travelers aligned more strongly with the value of learning new things such as skills, and valuing the opinion of experts. Across all segments, cruisers share a desire to try new experiences, which makes sense, given the value proposition of cruising—the ability to conveniently serve up varied experiences for all age levels in a one-stop-shop format.

The main question then is: have cruisers’ values shifted as a whole, and have they shifted differently across segments given the current state of cruising and the impact from COVID?

We actually observed a shift in 2020 values across all tiers towards both sharing with others and caring for others, a similar but slightly different shift than was observed for the American population.

In 2020 findings we see a widespread shift away from trying new experiences, a value shared across all 3 segments in 2019, toward sharing with others—now common in all 3 segments. Additionally, we see growth or a maintained strength in the value of caring for others across all 3 segments.

This highlights a tier-agnostic unified cruiser mindset—one that is particularly exciting given the changes that are planned by the cruise industry to develop enhanced cruise health and safety.
standards in response to the global pandemic as the industry develops a strategy for a safe return to sailing. Cruisers now align with the two values that are most community focused, and are displaying a willingness to put the interests of others in the forefront. They also maintain the desire to share their experiences with others, despite the mounting fears that COVID presents and the media, local, and state government persuasion to favor solo activities and maintain social distancing. Additionally, we observed the growth in the value of curiosity, especially among premium cruise travelers, highlighting that these cruisers might be more inclined to adopt new travel precautions and get back to cruising rather than sit on the sidelines with a ‘wait and see’ attitude. These cruisers, across all segments, are social at heart and want to share experiences with others and care about their fellow travelers, the crew, and the communities visited by travelers.

Why Does it Matter?

They want to cruise

There is data that supports the idea that cruisers want to cruise. Cruisers seem to be trusting of cruise lines and are still eager to book future cruise trips. From the week of 6/13 to 6/27 cruise spending was up 50% week over week and up 250% since the end of March.3

The industry is seeing growing demand from new bookings for 2021, and recent trends through June indicate over 50% of 2021 bookings were new bookings. The remaining 2021 booking volumes resulted from guests applying their cruise credits from previously cancelled cruises to specific future cruises. In fact, 40% of agents saw an increase in bookings in May, according to new research from Cruise Adviser.4

Cruisers represent a passionate and often very dedicated type of traveler. There is reason to feel optimistic about the outlook of the cruise industry. In a longitudinal global survey of consumers, Deloitte found that 14% of the general population say they are likely or very likely to cruise in the next 3 months, a 27% increase between early-May and mid-July.5 Although 12% might not appear large, this is coming during the height of the pandemic and really highlights a smaller but mighty group of loyal cruisers. Even more interestingly is the difference amongst ages, with younger generations (18-34) consistently hovering around 23% week over week since April.6 While older generations such as Baby Boomers represent the largest group of current cruisers, these numbers provide hope for cruise brands looking to attract new cruisers, the largest group of which is comprised of Gen Z and Millennials.

Though they won’t cruise blindly

So, a group of small but loyal cruisers exists, who still want to cruise even as ships are cancelling their departures, which is promising. However, we also found that cruisers are very aware of the pandemic; they are taking health precautions and are calculated in their decision making. Responses by cruisers to questions posed by YouGov, an internet-based market research firm that surveys the U.S. general population on a weekly basis across thousands of questions, indicate that 50% of cruisers report sanitizing their food packaging most or all the time—that’s 57% higher than the general population’s response. 34% of cruisers are more likely to fly on an airline requiring a mask vs. 20% who are less likely, and the remainder are indifferent.7

This is the safety they care about

These figures signal that cruisers are indeed vigilant, and they have a specific outlook when it comes to the heightened safety procedures. Cruise companies should consider putting cruisers in a position of power in sharing responsibilities for keeping everyone safe. This group is likely to modify their behaviors if it means caring for their fellow travelers. Cruiser values indicate that travelers would be supportive of a shift that empowered them to take part in the safety protocol such as wiping down exercise machines, being extra sensitive to any symptoms while onboard, or just generally being respectful and obedient of stricter policies. Our recent survey even indicates that they would be more willing to give up personal freedoms or subject themselves to safety procedures that are uncomfortable—more than half of cruisers responded that temperature checks would make them more likely to visit a business, and a full two-thirds said the same for mandated masks.8

See next page for a sample cruise journey with safety callouts based on cruiser responses from Deloitte’s latest safety & cleanliness survey.9

One thing that really stands out from this infographic, is the desire for tracking the health of other guests to improve their comfort when returning to travel and leisure. It begs the question of how this might be accomplished. Deloitte’s MyPath™ can offer a two-pronged solution. It enables a cruise to track digital health surveys pre-trip for both cruisers and employees and then use digital contact tracing, by leveraging Bluetooth Low Energy technology during the trip. Through a purposefully designed ‘value-loop,’ cruise-brands can incentivize travelers to opt-in with perks such as early access, drink vouchers, or entertainment credits—and the health information can contribute toward a safer cruise experience.
companies can set the new normal for travel safety. Recently, Royal Caribbean and Norwegian announced a collaboration to oversee the development of enhanced cruise health and safety standards, and Carnival is partnering with the WTTC to establish insights and best practices. Cruise companies can aim to rewrite the stigma placed on them by the media about being unsafe, enclosed places of travel—and really work toward procedures that make them one of the safest leisure travel options coming out of this pandemic.

In addition to using panels of experts to guide their choices, cruise companies should also ensure that these new protocols have a human-centric approach. It makes sense that cruisers want a company to deliver on the promises they made, such as a guarantee to navigate oceans dependably. It’s the desire for humanity that stands out and further supports the notion that cruisers truly want brands to genuinely care for the experience and well-being of others.

What it Means
Cruisers from all segments are similarly impacted by the pandemic as highlighted by this unified shift in values. Additionally, they care about safety but their shift towards caring shows that they are willing to put the interests of others in the forefront and trust that others will do the same. If cruise-brands were hesitant on how far to push the safety envelope, cruisers values in light of the pandemic indicate that cruise companies can truly explore these options.

While our safety-focused survey highlights innovative procedures that customers desire, it is cruisers’ values and drivers of trust that make it possible for cruise companies to truly explore these options.

Additionally, utilizing Deloitte’s proprietary Human Experience (HX™) TrustID™, we found that Cruisers’ top signals for trusting a brand are the displayed forms of humanity and reliability. It makes sense that cruisers want a company to deliver on the promises they made, such as a guarantee to navigate oceans dependably. It’s the desire for humanity that stands out and further supports the notion that cruisers truly want brands to genuinely care for the experience and well-being of others.

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While this means accounting for customer values and safety desires, it also means that cruise companies should consider their employees. According to Deloitte’s safety survey we found that employees also feel passionate about certain protocol as 76% of cruise employee respondents said that staggered shifts would make them more comfortable as they return to work and 81% said they would feel more comfortable if everyone receives health and wellness training. It’s important that as companies form safety coalitions, they not only consider customer opinion.

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but involve their workforce to truly encompass the human experience and ensure a positive return to sailing for the cruise ecosystem and not just one party.

Cruise companies are already hard at work behind the scenes to redesign safety standards when cruises return to sailing.\(^{14}\)\(^{15}\) We believe that based on the values of cruisers in times of COVID, cruise companies can push the boundaries with confidence and can expect their cruisers to return to the ships with expectations of safety protocol but also with expectations that they too will need to do their part to uphold that safety and cleanliness. Brands can also use this as an opportunity to highlight multi-generational cruising because a great way to care for others and share your experience as we bounce back from this pandemic is to do so with the people you know and trust.

Cruising is far from over and with mindful attention to expectations and enhanced health and safety standards, ships can start to leave port again—full of passengers eagerly waiting to take the holiday they’ve been dreaming of because Cruisers Gonna Cruise.

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**End notes**

1. CLIA Consumer Survey Spring 2019: based on respondents from 8 countries
2. Deloitte Safety & Cleanliness Survey, 5,000 respondents, May 2020
3. Deloitte’s InSightIQ: Credit/Debit Card Transaction Data
6. Ibid, (5)
7. YouGov Marketing Database
8. Deloitte HX in Uncertainty Survey, 16,000 respondents, May 2020
9. Ibid, (2)
10. Deloitte Trust Survey, 7,500 respondents, May 2020
13. Ibid, (2)
15. Ibid, (12)