

CRUISE TOURISTS: FOCUS ON ITALY

a Risposte Turismo survey on the perception about the current situation

To analyze and understand the impacts of the health emergency on the tourism sector, and in particular in the cruise sector, Risposte Turismo - research and consultancy company specialized in the tourism macro-industry - carried out a survey on the perception of Italian cruise passengers about the current situation. Cruising is one of the sectors whose market (to which Italy contributes with about 830,000 customers per year *) is characterized by a high share of repeaters, cruise passengers who have already boarded: a value that on a global scale can be estimated at around 55% of the total.

A clientele that knows the product well and has developed a certain familiarity over time with the cruise tourist experience. Risposte Turismo has investigated in recent days whether the exceptional situation due to Covid-19 has changed the repeaters' confidence, leading them to modify their own travel and vacation plans and intentions. A public questionnaire has been devised, distributed among the community and online portals ** frequented by cruise enthusiasts and freely compiled by users. It was possible to fill in the questionnaire from 9 to 14 April.

Referring to the methodological notes for further details, the 920 valid answers reveal a significant sample and distributed both by age and provenance classes and traveling companions.

Of the sample interviewed, 84% said they had booked or were planning to book one cruise to be completed by 2020. About two thirds of them said that the intention was not affected by the emergency situation due to Covid-19 and that therefore, if the offer resumes, they will be ready to board. Of the remaining, only a quarter reported having changed their opinion in what the cruise doesn't think is a safe holiday at the moment.

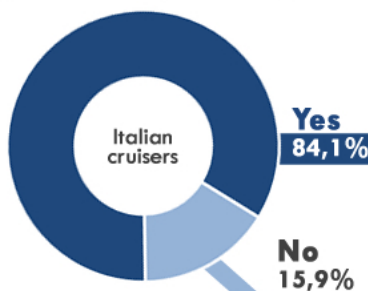
Among those who did not plan a cruise in 2020 (16% of the total), the majority affirmed the preference for this type of product will not change in the future. Interesting to note how, by distinguishing the response rates by age group, the over65s are those least inclined to vary the intentions due to the virus: only 14.3% will vary habits in some way, compared to 42.1% that emerges from respondents between the ages of 36 and 50.

Among those who claimed to have currently changed their opinion compared to the cruise, 40% hopes that the companies will actively work to increase safety on board. Significant to note that only 2.5% said that they will no longer change their opinion by giving up their holiday in cruise.

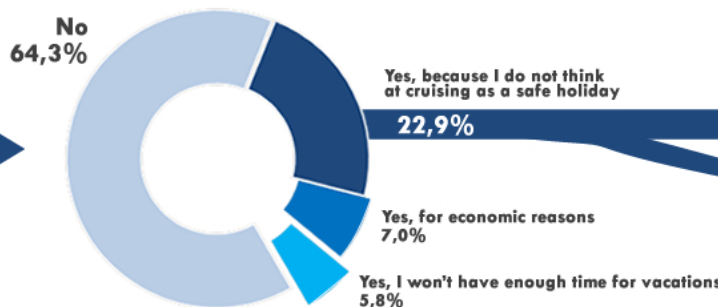
"From the survey - says Francesco di Cesare, President of Risposte Turismo - particularly interesting indications emerged. First of all, the intention of most Italians who well know the cruise product not to give it up, even in the current year whereas the conditions for returning on board reappear. The same respondents, however, believe that the cruise - when it comes to those who have no experience - can pay duty more than other products. If, therefore, on the one hand for cruise companies it may not be easy to conquer new demand in the short term, on the other hand they can be reassured by the evidence that loyal customers, who know and appreciate the product, at least a large part of them, will not change orientation e preference. It is consequently from the repeaters, among Italians as well as abroad, that the sector will be able to restart. "

(*) source CLIA Europe. (**) Thanks to CrazyCruises; Crocieristi.it; DanielaTomaselli blog; DreamBlog and PazzoPerilMare

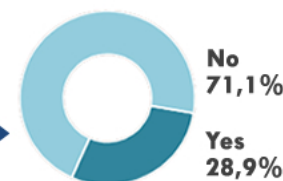
In the last months have you booked or have you the intention to book a cruise holiday (to sail during the 2020)?



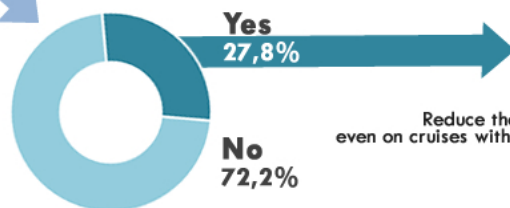
Compatibly to the passing of the current health emergency and its constraints, have you changed your intention (to cruise)?



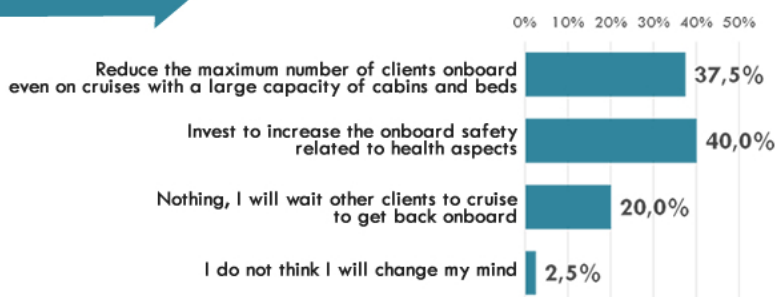
Have you already thought to substitute your cruise with another kind of holiday?



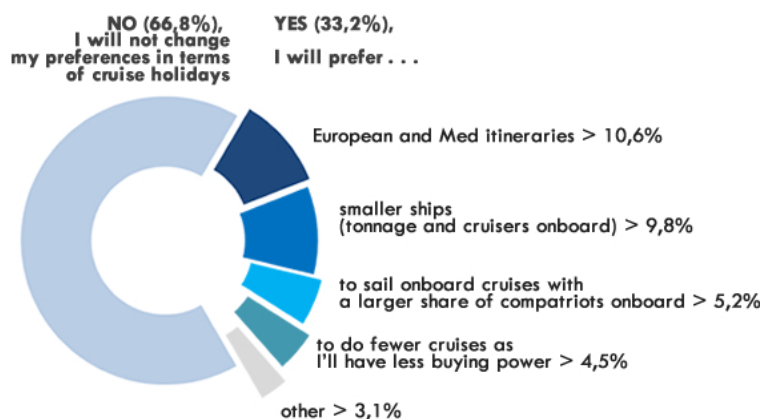
The current Covid-19 emergency has scratched your preference for cruise holidays?



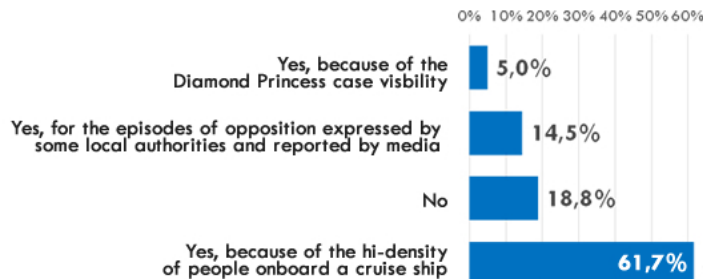
What can cruise companies do to recover your positive opinion on cruise holidays?



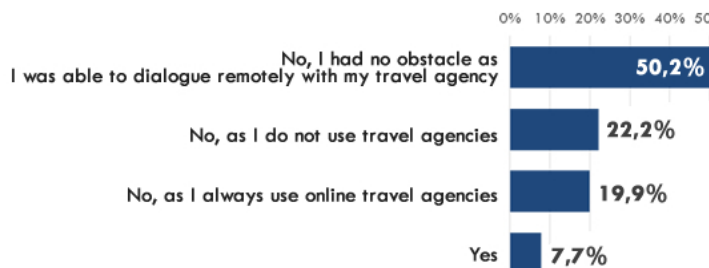
Where you'll be back onboard a cruise ship, what is happening is influencing your choices related to cruise holidays?



Do you think cruise holidays may suffer the effects of this pandemic more than other tourism products?



In order to manage your booking or to understand the availability of offers and promotions, have you ever experienced difficulties in dialoguing with travel agencies?



Source: Risposte Turismo (2020).

Methodology: survey on Italian cruisers to understand the perception and the willingness to vary their future travel intentions based on the current health situation. Questionnaires filled by users anonymously and forms distributed electronically among the communities and online portals frequented by cruise enthusiasts (thanks for the collaboration to CrazyCruises, Crocieristi.it, DanielaTomaselli, DreamBlog, PazzoPerilMare). Questionnaires available from April 9 to 14, 2020. Total survey sample: 920 valid forms had been elaborated.

Survey sample details (Italian cruise clients¹)

