



Market  
Research

# River Cruising Omnibus Study

June 2016

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## River Cruising Omnibus Study

Project #160036

### Background & Purpose

AAA Public Relations is preparing for a press release on river cruising.

### Objectives

- Determine consumers' past/future behavior and perceived benefits of river cruising to help understand interest in market

**Key Findings**

*Note: As this is the first time this study has been conducted, historical data are not available.*

**A. Previous River Cruising Experience**

14% of US adults have taken a river cruise vacation in the U.S. or an international destination.

- Of these adults, 61% have taken a U.S. river cruise vacation and 54% have taken an international river cruise vacation.

Table 1 – Previous River Cruise Experience Among U.S. Adults

	U.S. adults N= 1,012
Taken a U.S. or international river cruise	14%
Never taken a U.S. or international river cruise	86%

Table 2 – Type of Previous River Cruise Among U.S. Adults Who Have Taken a River Cruise Vacation

	U.S. adults who have taken a river cruise vacation N= 175
U.S. river cruise	61%
International river cruise	54%

**B. Interest in River Cruising**

Roughly 4 in 10 U.S. adults would consider taking a river cruise in the U.S. or internationally for an upcoming vacation.

Table 3 – Percent of U.S. Adults That Would Consider a U.S. or International River Cruise for an Upcoming Vacation

	Would consider a <u>U.S. river cruise</u> N= 1,012	Would consider an <u>international river cruise</u> N= 1,012
Yes	40%	37%
No	59%	61%
Don't Know/Refused	1%	2%

**C. Likelihood to Take a River Cruise**

Within the next five years, 1 in 4 U.S. adults are very likely or likely to take a river cruise vacation in the U.S. or internationally.

- Nearly half (48%) of river cruisers are very likely or likely take another in the next 5 years.

Table 4 – Likelihood to Take River Cruise in Next Five Years Among U.S. Adults and U.S. Adults with River Cruising Experience

	U.S. adults N= 1,012	U.S. adults that have previously taken an river cruise N= 175
<b>Net: Very likely + Likely</b>	24%	48%
Very likely	8%	18%
Likely	16%	30%
Neither likely nor unlikely	11%	9%
Unlikely	20%	18%
Very unlikely	44%	26%
<b>Net: Unlikely + Very Unlikely</b>	64%	43%
Don't Know/Refused	<1%	0%

#### D. Most Appealing Benefits of River Cruising

A range of river cruising benefits appealed to respondents.

- Fifty-four percent (54%) of U.S. adults feel that an all-inclusive experience that includes the journey, not just the destination, is the most appealing benefit of river cruising.
- Other benefits that are similarly appealing include destinations, authentic travel, and docking in the heart of a city or town.
- The millennial market appears to be particularly interested in river cruising and responds more strongly than Gen-X and Boomers to most of the attributes of river cruising tested.

Table 5 – Most Appealing Benefits of a River Cruise Vacation Among U.S. Adults and Generations

River Cruising Attributes	U.S. Adults N= 1,012	Millennials (Ages 18-35) N= 196	Gen X (Ages 36-51) N= 171	Baby Boomers (Ages 52-70) N= 412
An all-inclusive experience that includes the journey, not just the destination	54%	65% ↑↑	49%	55%
The ability to visit unique destinations not accessible by larger cruise ships	50%	62% ↑↑	46%	47%
Cruise destinations	49%	61% ↑↑	43%	45%
The opportunity for an authentic travel experience	48%	58% ↑↑	42%	47%
The convenience of docking right in the heart of a city or town	48%	54%	45%	47%
Ship amenities like on-board entertainment and/or dining	46%	54% ↑	47%	43%
Included shore excursions	46%	54% ↑	37%	46%
Overall value	46%	57% ↑↑	42%	43%
Smaller, more intimate ships	38%	40%	37%	41%
None of these	25%	18%	28%	26%
Don't Know/Refused	2%	0%	1%	4%

An up red arrow (↑) indicates a significant increase from Gen X while a down red arrow (↓) indicates a significant decrease.

An up blue arrow (↑) indicates a significant increase from Baby Boomers while a down blue arrow (↓) indicates a significant decrease.

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## Methodology

This report presents the findings of a telephone survey administered as part of ORC's weekly survey conducted among two national probability samples (landline only and cell phone), which, when combined, consists of 1,012 adults living in the continental United States. Interviewing for this CARAVAN® Survey was conducted June 23- June 26, 2016.

This study has an average statistical error of  $\pm 3.9\%$  at the 95% confidence level for all US adults. That means there is a 95% chance that the results found in this study are within  $\pm 3.9\%$  of the results that would be found if all US adults living in private households in the continental United States were interviewed using the research methodology and questionnaire used in this study. The actual statistical error depends on the number of respondents to each question and on the observed proportions.

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### Detailed Findings/Topline Tables

On another subject...

C1 Have you ever taken a river cruise vacation in the U.S. or in an international destination?  
Would you say... *(Multiple responses possible)*

N: 1,012

Base: US Adults

9% Yes, in the U.S.  
8% Yes, in an international destination  
86% No, neither

C2 Would you consider an INTERNATIONAL river cruise for an upcoming vacation?

N: 1,012

Base: US Adults

37% Yes  
61% No  
2% Don't Know/Refused

C3 Would you consider a U.S. river cruise for an upcoming vacation?

N: 1,012

Base: US Adults

40% Yes  
59% No  
1% Don't Know/Refused



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C4 Within the NEXT 5 YEARS, how likely are you to take a river cruise in the U.S. or an international destination? Would you say you are...

N: 1,012

Base: US Adults

24%	<u>Net:</u> Very likely + Likely
8%	Very likely
16%	Likely
11%	Neither likely nor unlikely
20%	Unlikely
44%	Very unlikely
64%	<u>Net:</u> Unlikely + Very Unlikely
<1%	Don't Know/Refused

C5 What are the most appealing benefits of a river cruise vacation to you? Would you say...  
*(Multiple responses possible)*

N: 1,012

Base: US Adults

54%	An all-inclusive experience that includes the journey, not just the destination
50%	The ability to visit unique destinations not accessible by larger cruise ships
49%	Cruise destinations
48%	The opportunity for an authentic travel experience
48%	The convenience of docking right in the heart of a city or town
46%	Ship amenities like on-board entertainment and/or dining
46%	Included shore excursions
46%	Overall value
38%	Smaller, more intimate ships
25%	None of these
2%	Don't Know/Refused

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## Appendix – Questionnaire

On another subject...

- C1 Have you ever taken a river cruise vacation in the U.S. or in an international destination?  
Would you say...

(READ ENTIRE LIST BEFORE RECORDING AS MANY AS APPLY FOR 01-02)

- 01 Yes, in the U.S.
- 02 Yes, in an international destination
- 03 Or no, neither
- 99 DON'T KNOW/REFUSED

- C2 Would you consider an INTERNATIONAL river cruise for an upcoming vacation?

- 01 YES
- 02 NO
- 99 DON'T KNOW/REFUSED

- C3 Would you consider a U.S. river cruise for an upcoming vacation?

- 01 YES
- 02 NO
- 99 DON'T KNOW/REFUSED

- C4 Within the NEXT 5 YEARS, how likely are you to take a river cruise in the U.S. or an international destination? Would you say you are...

(READ ENTIRE LIST BEFORE RECORDING ONE ANSWER)

- 01 Very likely
- 02 Likely
- 03 Neither likely nor unlikely
- 04 Unlikely
- 05 Or, very unlikely
- 99 DON'T KNOW/REFUSED

C5 What are the most appealing benefits of a river cruise vacation to you? Would you say...

(READ LIST. RECORD AS MANY AS APPLY. WAIT FOR YES OR NO FOR EACH) [RANDOMIZE]

- 01 The opportunity for an authentic travel experience
- 02 Smaller, more intimate ships
- 03 The convenience of docking right in the heart of a city or town
- 04 Cruise destinations
- 05 Ship amenities like on-board entertainment and/or dining
- 06 Included shore excursions
- 07 Overall value
- 08 An all-inclusive experience that includes the journey, not just the destination
- 09 The ability to visit unique destinations not accessible by larger cruise ships
- 98 NONE OF THESE
- 99 DON'T KNOW/REFUSED