

What is current consumer intent revealing about the cruise industry?



Verve



Wave Season

July 16th, 2026

Targeting and Measurement Capabilities



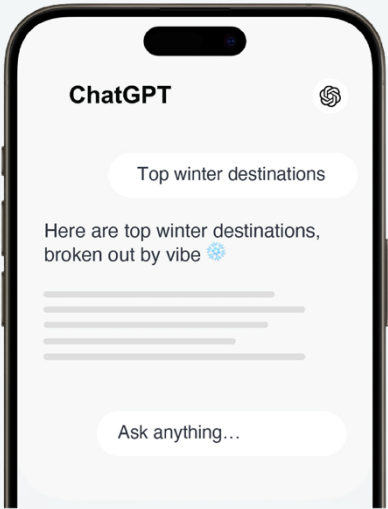
Verve's ability to decode consumer intent comes from 3 rich data sources

Verified in-market buyers identified through AI chat queries, active product search behavior, and declared interest in category and product, captured from first curiosity to final consideration.

LLM Data



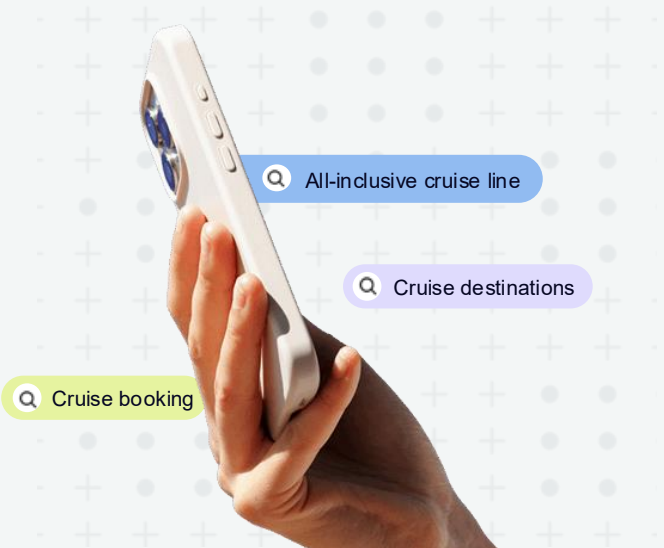
Unfiltered consumer intent, revealed through natural dialogue.



Search Intelligence



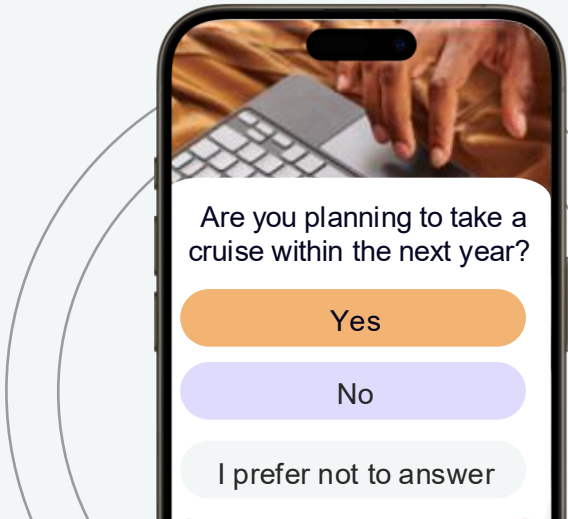
What consumers are actively searching for right now across the open web.



Surveys



What consumers directly declare: preferences, intent, purchase plans.





Understanding our methodology

Our proprietary targeting solution combines search intent and LLM conversational signals with the transparency of zero-party polling data, revealing not just who to target, but why.

LLM Data



AI conversations reveal intent in its earliest stages, where consumers are exploring options or seeking recommendations. Verve captures these signals to show brands what questions are being asked about their category, products, or competitors.

- **Capture and combine data**

Conversational signals from ChatGPT, Gemini, Grok, Claude, and Perplexity are layered on top of our existing search intent and zero-party data.

- **Privacy-safe**

Opt-in, aggregated, anonymized, and cookieless.

- **Activate and scale**

Platform agnostic, built to scale with 1B+ events per day, and activated across all media channels and devices.

Search Intelligence



We're the largest holders on on-site search intent data outside of walled gardens, analyzing 1B+ daily search events from websites and LLMs.

- **Real-time data capture and analysis**

Ingest search events from the open web

- **Semantic understanding of search context**

Analyze data and use natural language processing to classify data

- **Understand the entire search journey**

Classify users by their searches, converting them into audiences based on their intent

Surveys



Polling captures shifts in consumer behavior and intent throughout the campaign. Vera, our machine learning platform, analyzes this signal in real time to re-score the audience — surfacing high-intent users and filtering out the rest.

- **Survey audience**

Poll thousands of consumers to identify your target audience.

- **Analyze data and target campaign**

Analyze zero party data + data from 3P partnerships to develop enhanced targeting segments.

- **Execute campaign**

Vera, our machine learning platform, continuously produces key campaign insights and optimization recommendations that support your custom KPI's.

Insights

Using survey signals and search behavior to understand where cruise demand is building, how travelers move from inspiration to booking, and which experience types are shaping consideration.



Cruise demand stretches beyond the traditional Wave Season peak

Cruise search consistently rises around Jan–Mar, but recent peaks are climbing higher, suggesting today’s, and next year’s, considerers are entering a more active planning window.

+ Wave Season concentrates cruise interest, typically. Search demand repeatedly lifts around Jan–Mar, reinforcing this period as a key decision window.

+ 2023-2025 show Wave Season was the beginning, with cruise search blooming into spring and peak interest extending later into the year. This is aligned with [CLIA](#) projections for higher passenger count, up 2.4M year-on-year to a projected 37M passengers.

+ The latest surge suggests **consideration is accelerating**. The sharp 2026 lift points to heightened planning. Undecided travelers are more reachable with cruise intent on the rise.



➔ Takeaway

Cruise demand still builds around Wave Season, but the opportunity is no longer confined to Jan–Mar. Brands should use the peak period to capture active planners, then continue messaging into the extended window while undecided travelers remain primed.

Are you planning to take a cruise in the next 12 months?

Yes, I've already booked 21% ✓

Yes, I'm planning to book soon 6% ✓

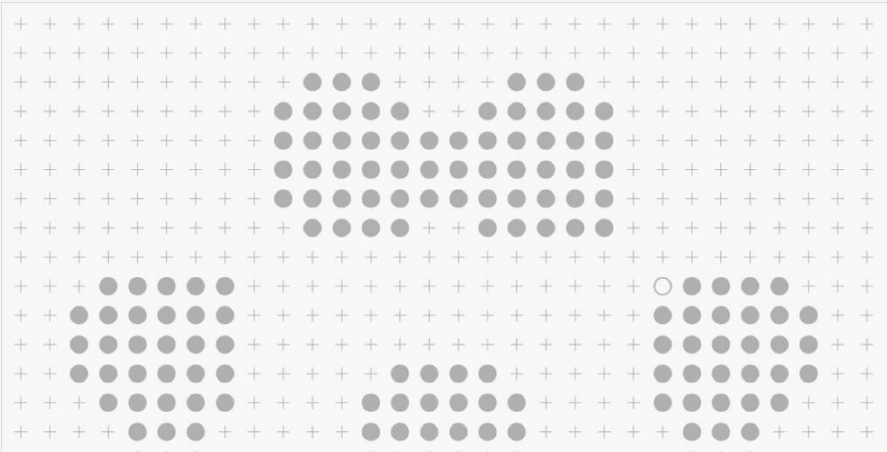
I'm considering it but haven't decided 73% ✓



Considering a cruise

While cruise interest is **high**, commitment is also **open**. With most respondents considering a cruise but are yet to decide, brands have a strong window to move travelers from curiosity to booking.

Strong brand loyalty highlights competitor conquering challenges across undecided consumers



↗ 1.12

AVG BRANDS PER SEARCHER

Mean distinct cruise brands considered per person

↗ 8.9%

CONSIDER 2+ BRANDS

The cross-shopping minority of consumers considering multiple lines

↗ 2.34

AVG AMONG CROSS-SHOPPERS

When consumers do compare, they consider just over two lines on average

US cruise consideration is overwhelmingly single-brand.



Nearly 91% of Americans searching for a cruise line engage just one brand — cross-shopping is the exception, not the rule. The battle for consideration is won before the planning begins. Building strong brand awareness combined with a trusted image will be key to both capturing cruise first-timers and building out a long-term loyalty pipeline.



A landscape of big players and long-tail specialists



Royal Caribbean currently dominate US cruise search

With 37% of branded cruise search Royal Caribbean is in a strong position, and well situated to leverage loyalty.



Signs of growing competition

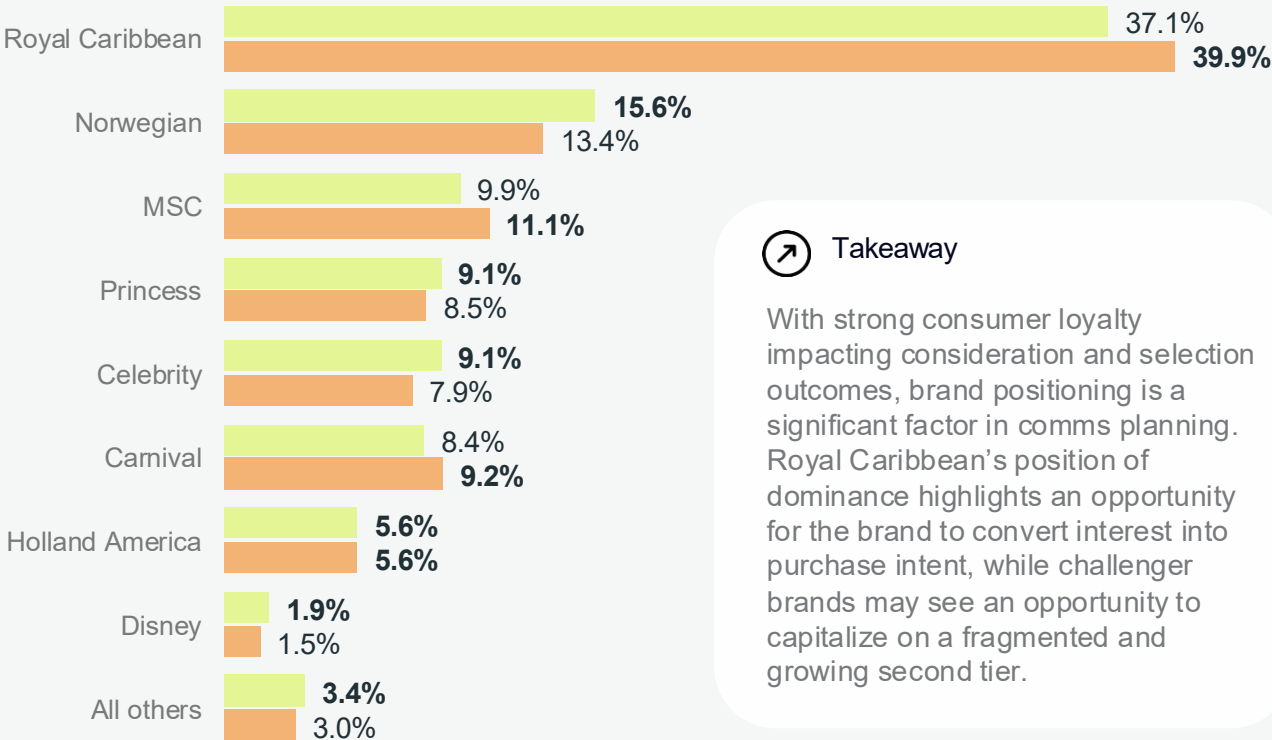
Royal Caribbean’s dominance has fallen slightly YoY, with leading and long tail competitors taking advantage in 2026.



A competitive mid-tier accounts for nearly 2/3 of intent

The remainder of the top 10 account for the majority of cruise search, but intent is evenly distributed.

Share of search H1 vs. H2 Cruise consideration across top 10 brands



Takeaway

With strong consumer loyalty impacting consideration and selection outcomes, brand positioning is a significant factor in comms planning. Royal Caribbean’s position of dominance highlights an opportunity for the brand to convert interest into purchase intent, while challenger brands may see an opportunity to capitalize on a fragmented and growing second tier.

H1 2026 H1 2025

US, H1 2026 vs H1 2025



What's in a name: how ships shape branded search



Ship intent underpins brand share of search

9 in 10 brand searches* are for specific ships, providing a clear focal point for activation & differentiation.



Recency and redeployment drive consumer intent

New hardware drives momentum, e.g. Disney Destiny and Star of the Seas, while re-energized refits and redeployments such as Norwegian Breakaway, Grandiosa, and Caribbean Princess also deliver gains.

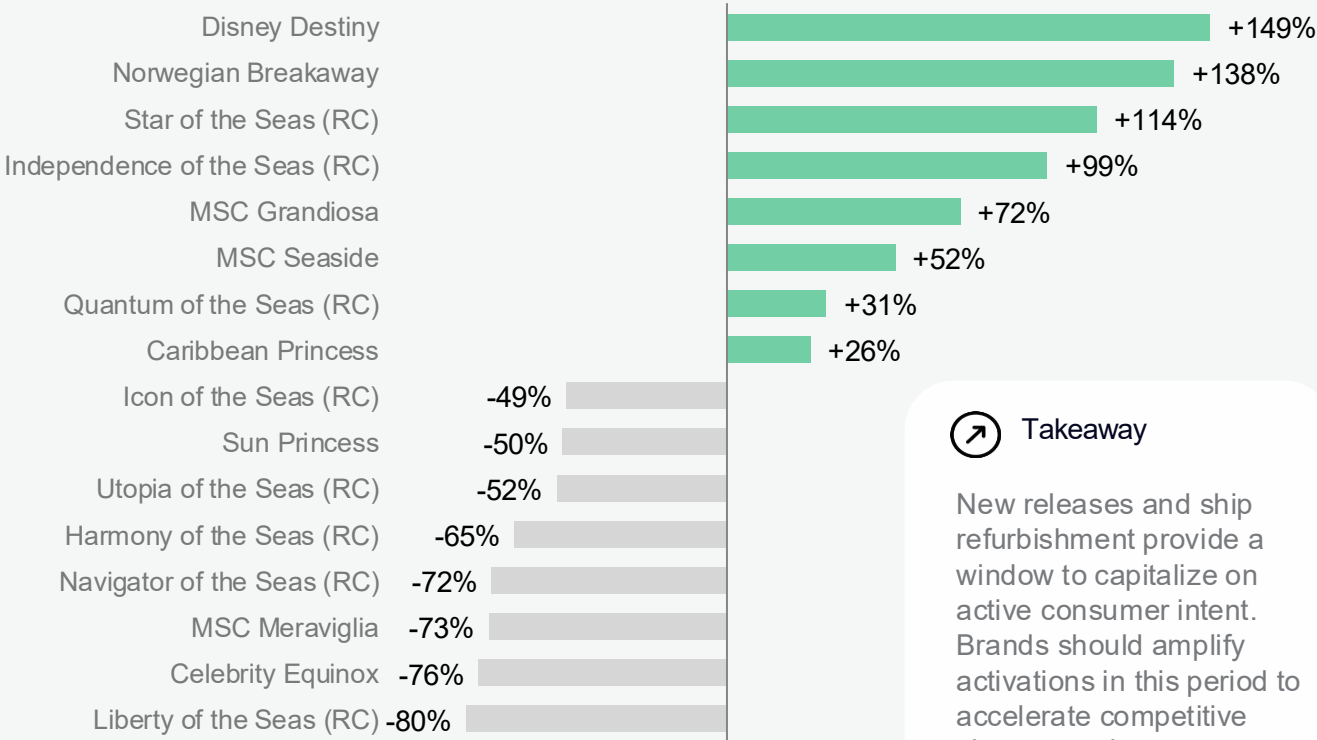


Launch momentum is a short-lived opportunity

Launch impact normalizes fast, with previously prominent releases (e.g. 2024's Icon of the Seas, Sun Princess, and Utopia) falling back year on year.

YoY search trend

Cruise consideration by brand



Takeaway

New releases and ship refurbishment provide a window to capitalize on active consumer intent. Brands should amplify activations in this period to accelerate competitive share growth.

US, H1 2026 vs H1 2025



What is the single most important factor when booking a cruise?

Price and value 60% ✓

Destinations and itinerary 26% ✓

Onboard experiences (dining, activities, entertainment) 14% ✓



Booking with value in mind

Value is a major influence in the booking decision. Cruise brands should lead with price, inclusions and offers to help travelers more easily justify the total value of the trip.

Cruise inspiration is gaining traction, but price still anchors demand

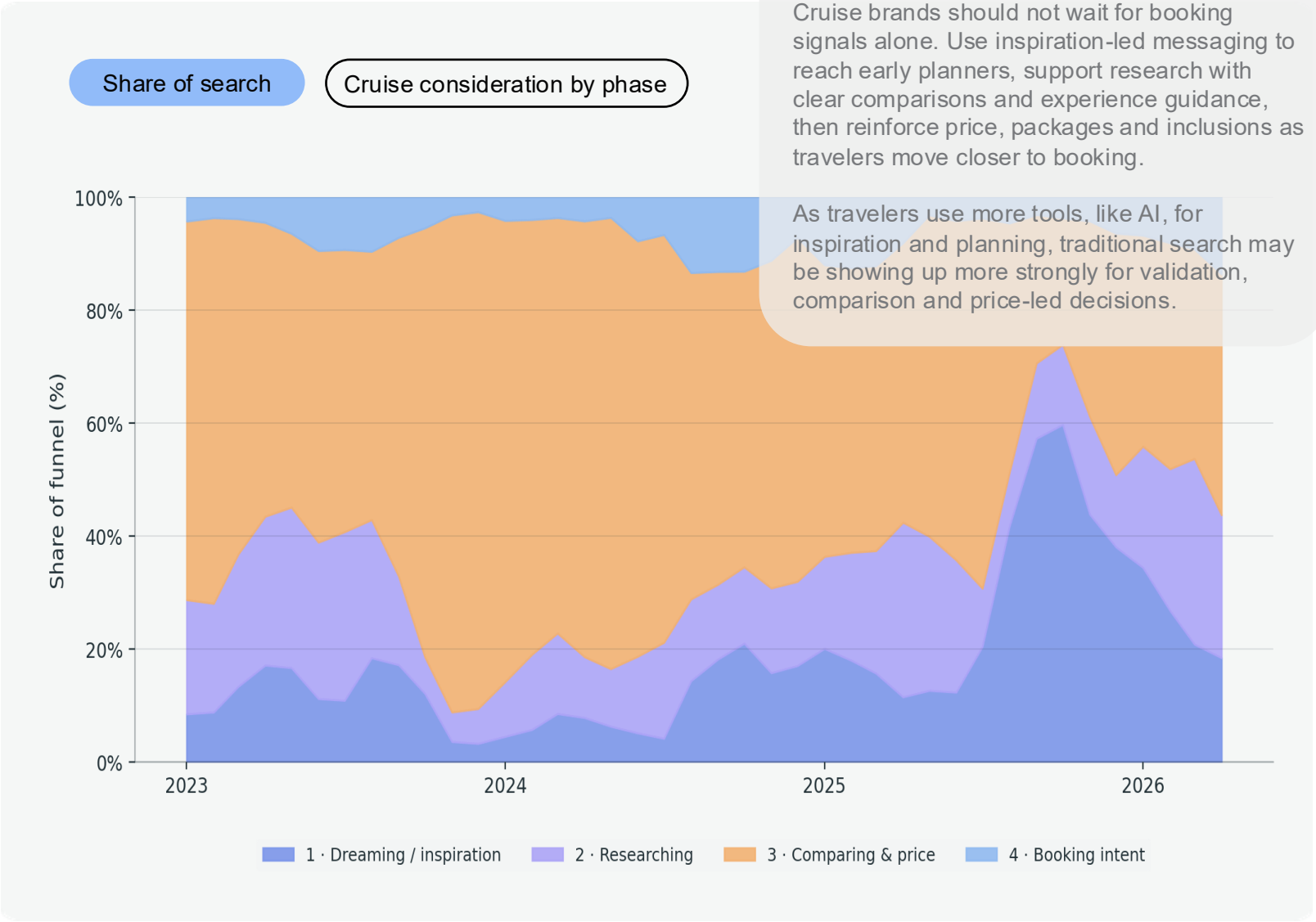
After years of comparison-heavy behavior, late-2025 search shows more travelers exploring cruise ideas, destinations and line options before narrowing toward cost and booking decisions.

- +** **Price and comparison historically led the funnel.** This suggests many entered the category with value and trade-offs already in mind.
- +** Late 2025 brought a **shift into inspiration.** Searches tied to “where to cruise” and “cruise for families” indicated more travelers were exploring the idea of a cruise.
- +** **Research also gained importance** as vacationers evaluated fit. Queries such as “cruise reviews” and “cruise tips” suggest travelers weighed different options frequently.

Takeaway

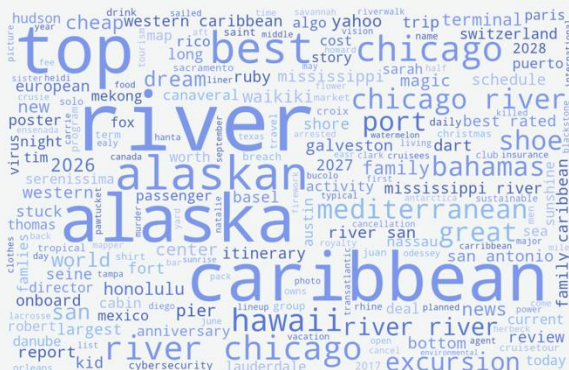
Cruise brands should not wait for booking signals alone. Use inspiration-led messaging to reach early planners, support research with clear comparisons and experience guidance, then reinforce price, packages and inclusions as travelers move closer to booking.

As travelers use more tools, like AI, for inspiration and planning, traditional search may be showing up more strongly for validation, comparison and price-led decisions.



What's in a search?

Phase 1



- **Inspiration intent** sees consumers focus on broader planning considerations – where they could go, what they could see and do. Location and quality are paramount.

Phase 2



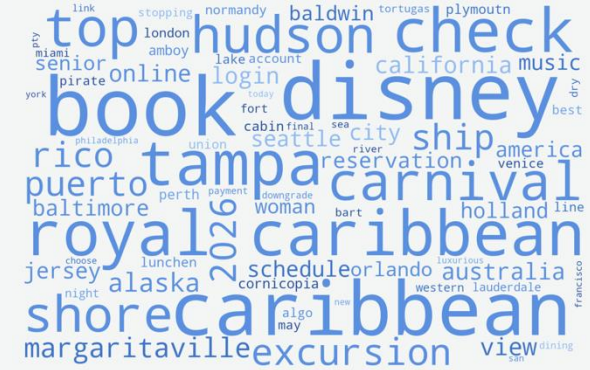
- **Moving into research** sees a shift towards logistics, as consumers look to understand packing practicalities and life on board.

Phase 3



- **Comparison intent** focuses less on brand, and more on cruise offerings, aligning with high loyalty intent. Drinks, packages, and 'all inclusive' are top of the agenda.

Phase 4



- **Booking intent** reverts to location, but with greater emphasis on departure over destination: travel, outbound location, reservations, schedules – and booking.

➤ Takeaway

Each phase of the consumer journey sees clear and defined keyword intent, providing a window into **effective audience targeting**, and the **messaging most likely to land** during these consideration stages.

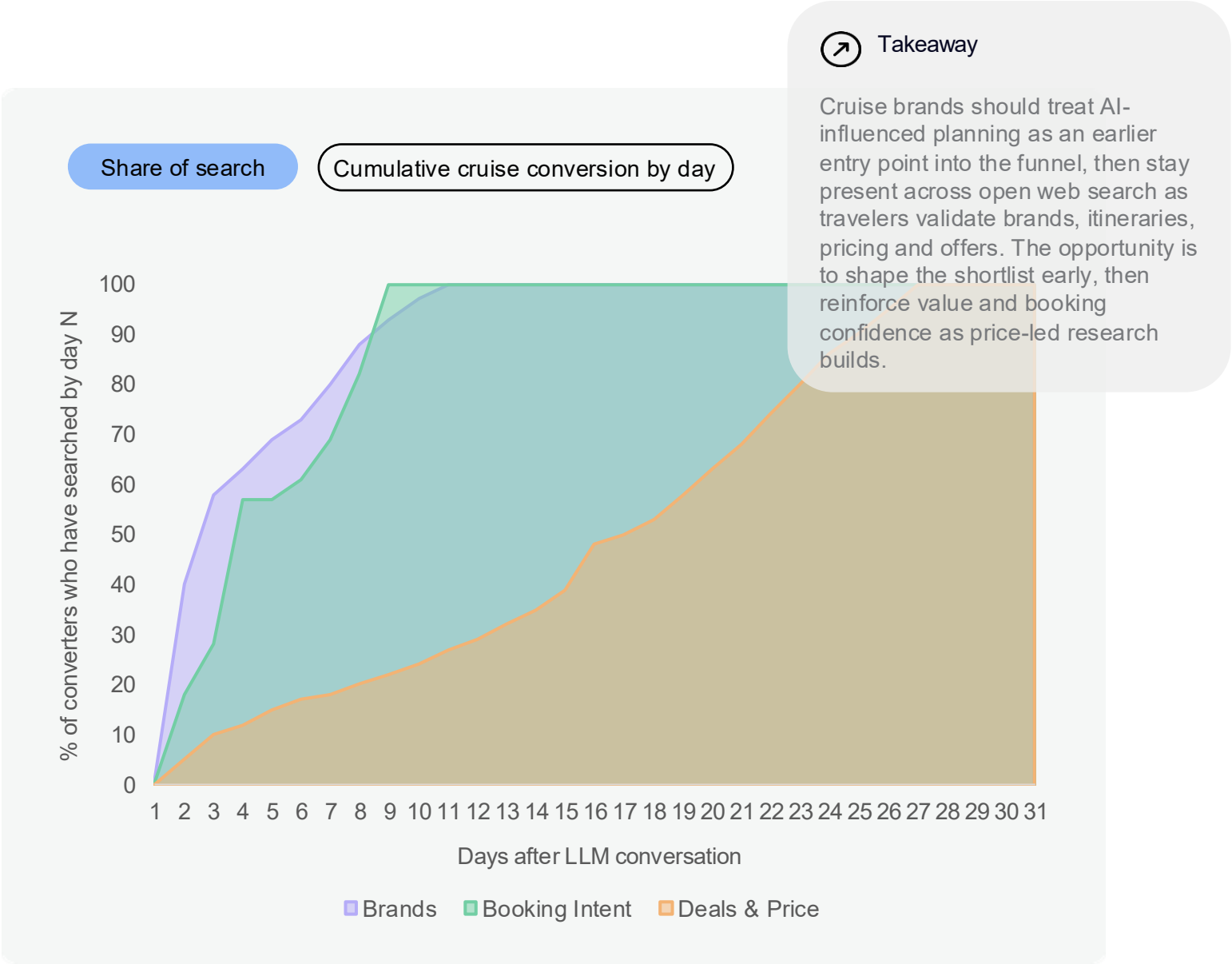
Effective targeting and tailored messaging should align with consumer intent stages to maximize relevance, and drive potential consideration and conversion outcomes.

Verve's audience targeting capabilities allow brands to reach these consumers in the right place, at the right time, to capitalize on in-market intent.

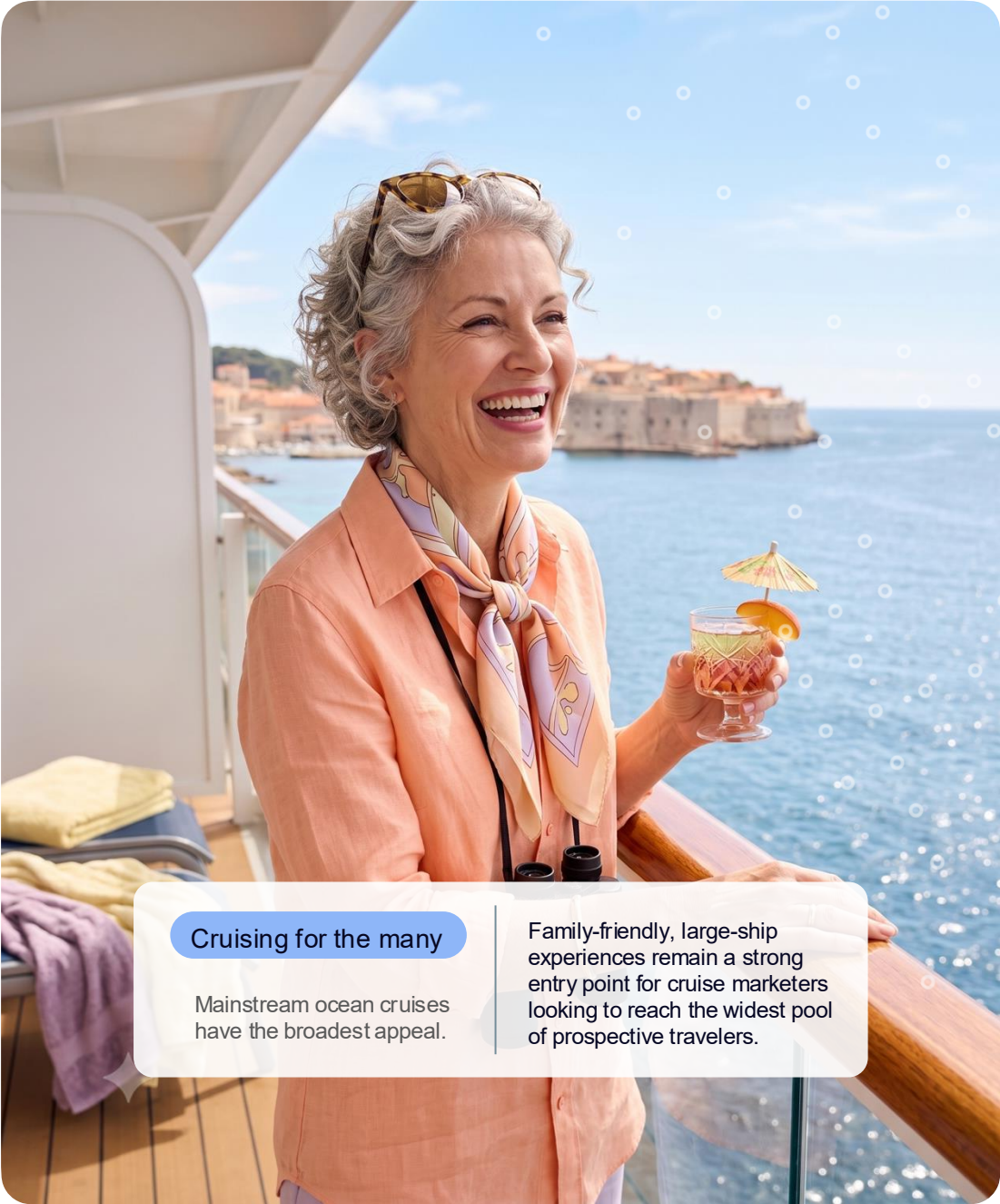
How AI is changing how cruisers consider, plan and book

LLM-to-search latency shows how cruise planners move from AI-led exploration into open web action.

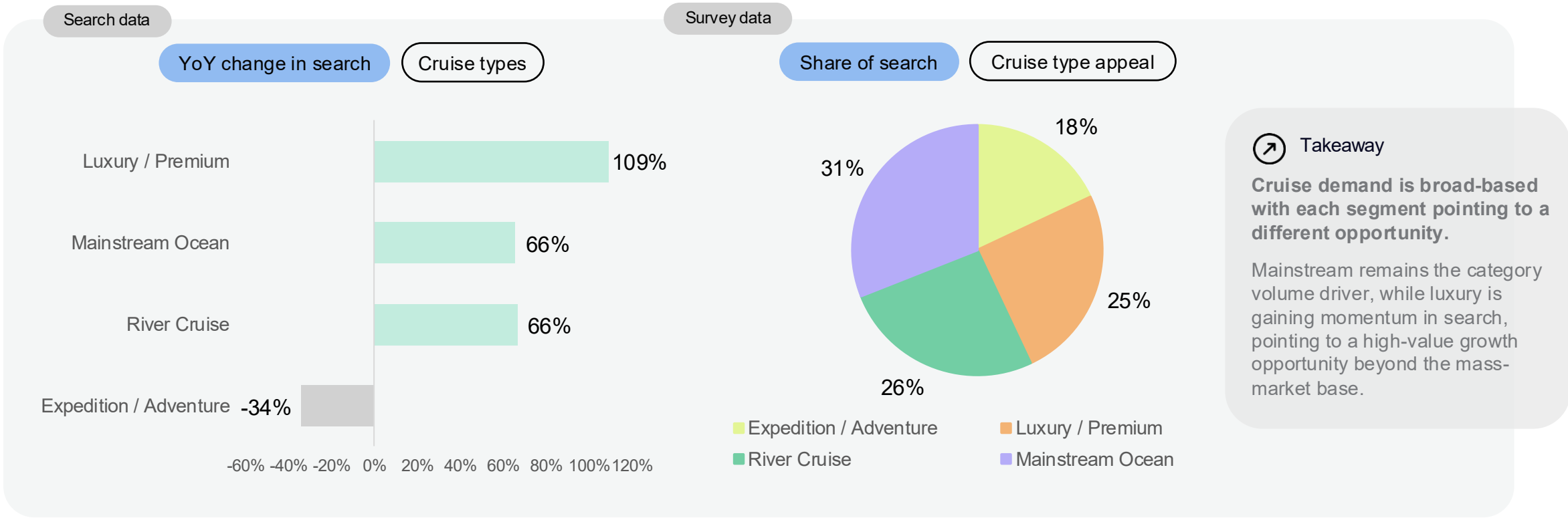
- Brands move quickly from AI to search**
Brand-related searches appear earliest, suggesting LLM conversations help travelers narrow their cruise shortlist before they move to open web validation.
- Booking intent follows close behind**
Cruise planners begin searching around booking signals from day one, pointing to AI as a potential accelerator from inspiration into practical trip planning.
- Price and deals extend the journey**
Deals and price searches rise more steadily over time, suggesting travelers continue using open web search to validate value, compare options and justify their booking decision.



Which type of cruise experience appeals to you most?



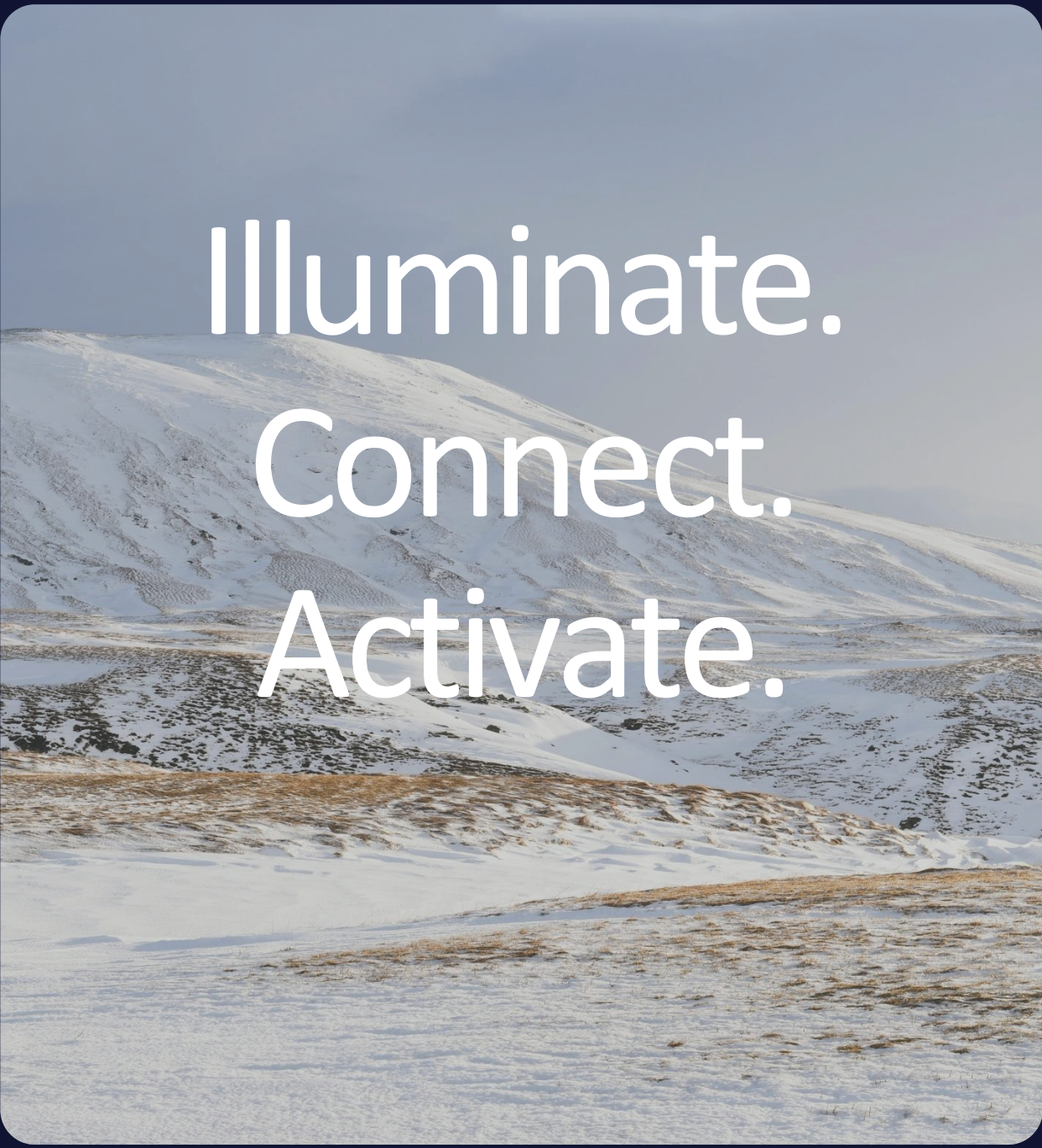
Mainstream cruises lead interest while luxury demand accelerates



- + Mainstream ocean cruises lead current appeal, giving large-ship brands the broadest traveler pool to reach today.
- + Luxury and river cruises show demand is not far behind the mass-market base.
- + Expedition is smaller, but still meaningful at 18%, pointing to a distinct adventure-led audience.

What to Make of This Signal

- Align this category view to match the pitch to the cruise line's consumer offering.
- Mainstream ocean lines can lean into broad family appeal, while luxury lines can build around high-class experience for families, couples, and individuals alike.
- River lines provide a point of differentiated discovery, with expedition brands able to focus on a smaller-but-distinct adventure-led audience.

A photograph of a vast, snow-covered landscape under a clear blue sky. The terrain is hilly and covered in a thick layer of snow, with some patches of brown grass visible. The text 'Illuminate. Connect. Activate.' is overlaid in white, bold, sans-serif font.

Illuminate.
Connect.
Activate.

Let's connect

Thank you