



Image source: Adobe Stock

River Cruise Industry Survey

#5

Autumn 2024





IG River Cruise



RIVER
CRUISE
EUROPE



river **Cruise**
Competence Center



pfeil



Cruise
Marseille
Provence

ARGE DONAU KREUZFAHRTEN ÖSTERREICH

donau // ÖSTERREICH

DER FLUSS, DER BEWEGT.

Thank You...



... and especially
to all those who
participated in the
survey!

Thank You...

"Quick Survey"



Input for the **Danube Conference**

Target groups: Stakeholders of the river cruise industry –
river and land based

Goal: Approaches for a positive development
of the industry

→ **"A look into the future"**

"The River Cruise Market"



Study of the **IG RiverCruise**

Target Groups: Stakeholders of the river cruise industry –
only **river based**

Goal: Analysis of market development, collection of key
metrics, topic 'Sustainability'

→ **"A look at the past season"**



A Look into the Future

Industry survey autumn 2024





Methodology

→ **Online survey**

- **Target group:** Stakeholders with direct or indirect connections to the river cruise industry
- **Focus:** Danube, Rhine, French rivers, Douro, NEW: Dutch rivers



Sample

135 complete and 5 partial interviews with stakeholders who belong to the target group.

Language: GER – ENG - FRA



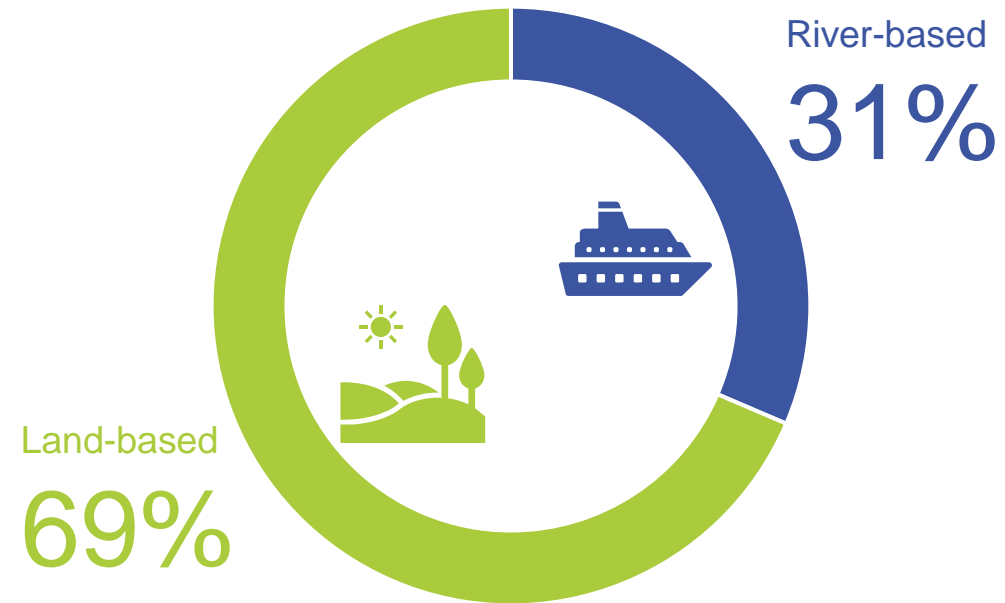
Fieldwork period

September 10 to
October 23, 2024

Participants by Industry

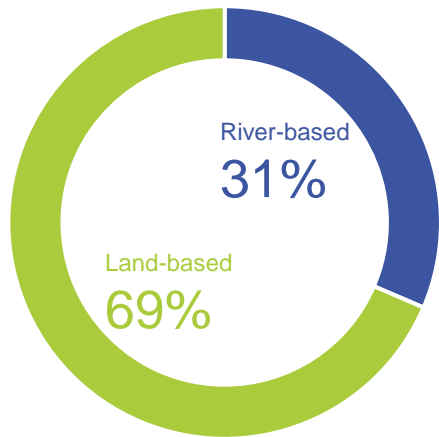
F1 Which industry do you belong to? If multiple industries apply, please choose the main industry.

N=140, only one response was possible

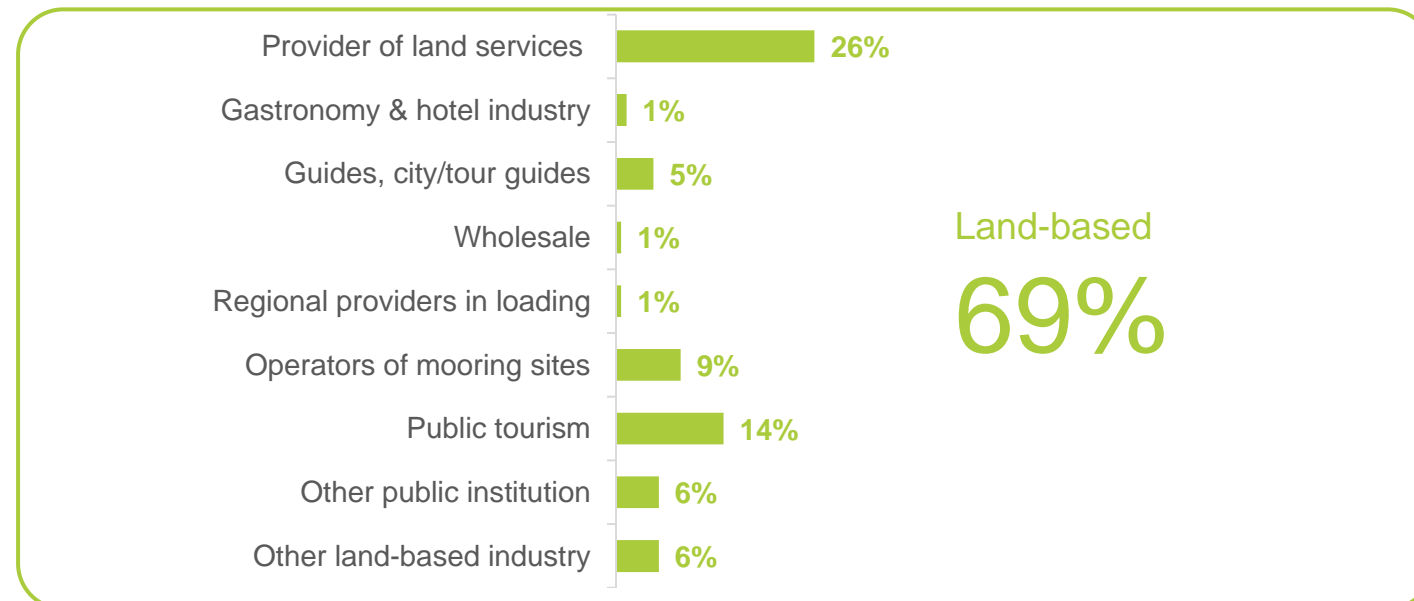
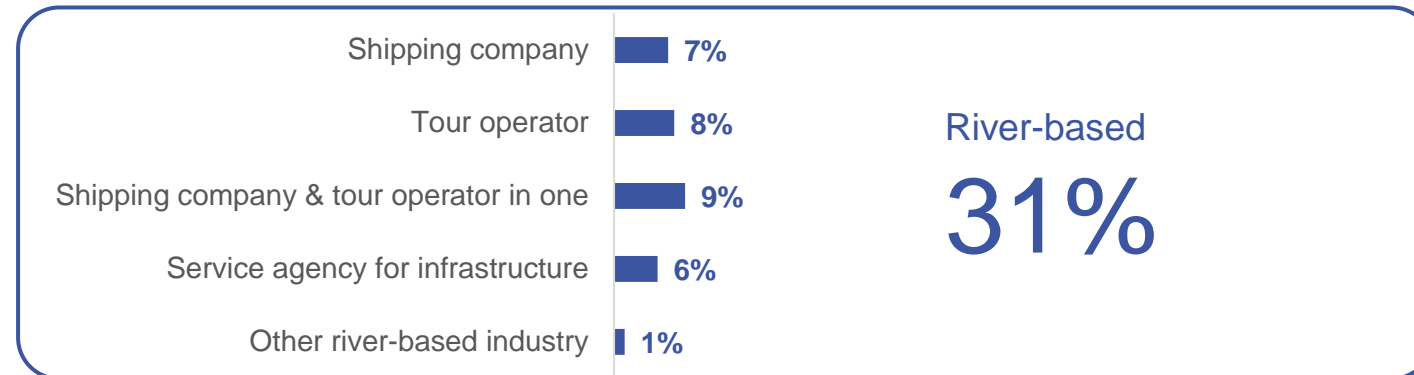


Participants by Industry

F1 Which industry do you belong to? If multiple industries apply, please choose the main industry.



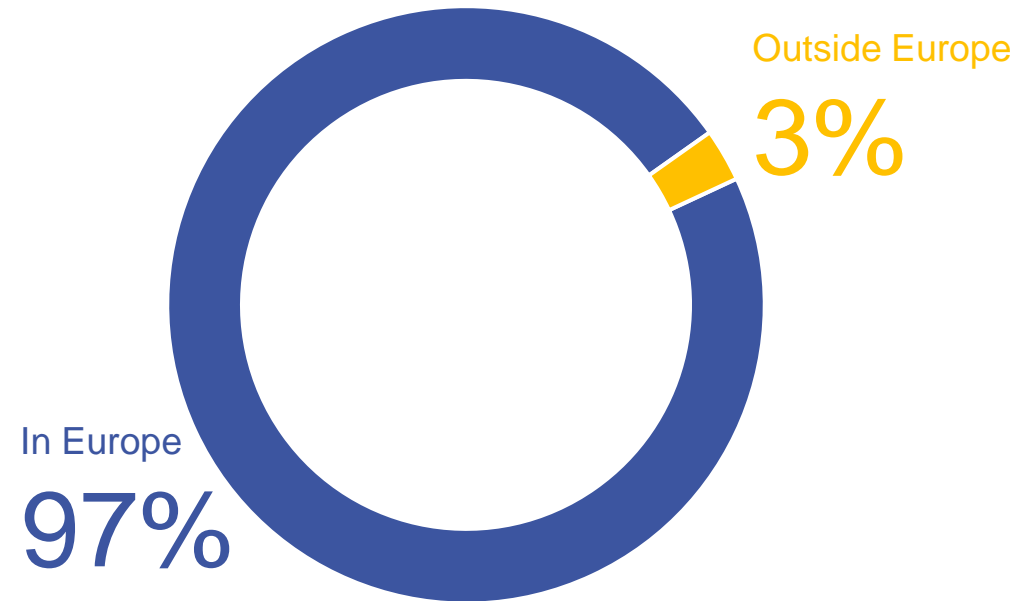
N=140, only one response was possible



Origin of Participants – Company Headquarters

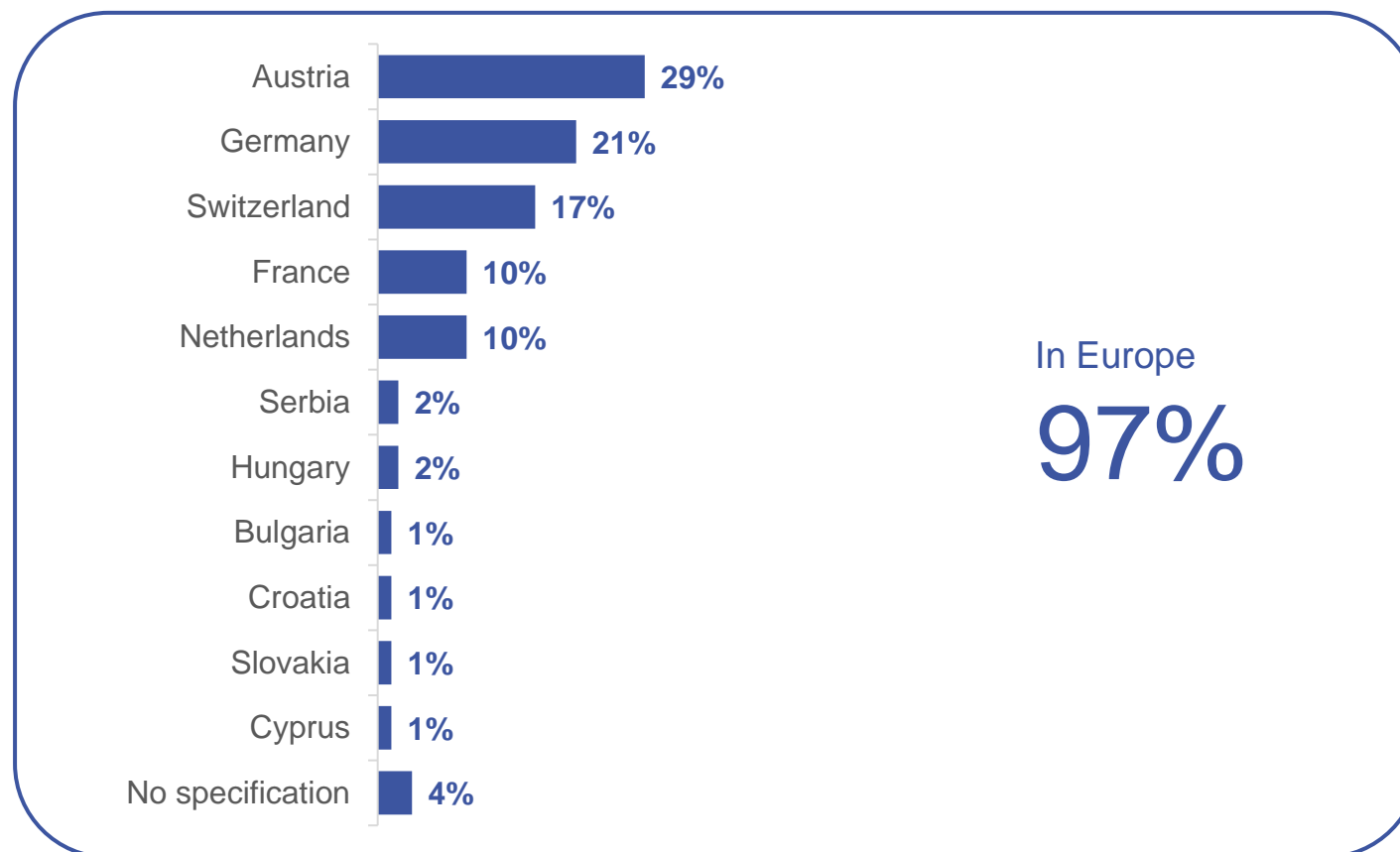
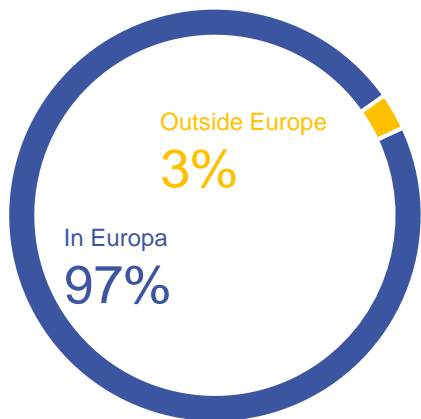
F3_1 Where is your company's permanent headquarters located?

N=140



Origin of Participants – Company Headquarters

F3_1 Where is your company's permanent headquarters located? (n=140) | If Europe: F3_2 Please click on the country where your company's permanent headquarters is located. (n=136)





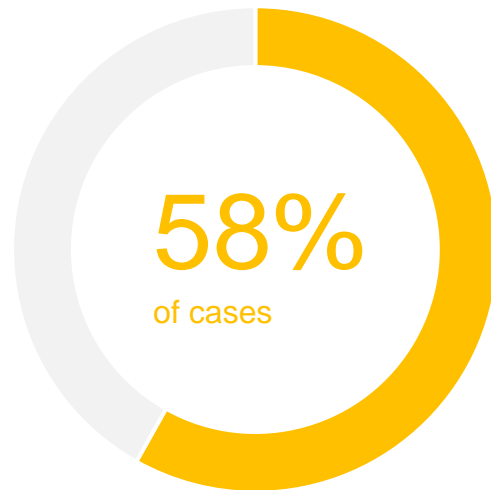
Source Markets, Travel Areas and Passenger Forecasts 2025 vs. 2024



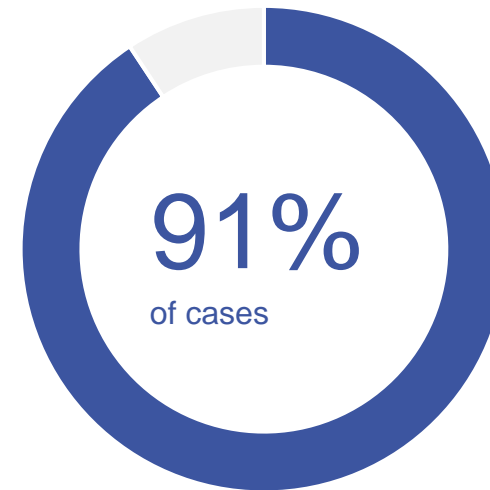
Important Source Markets

F4 Which source markets significantly impact your business success? Where does your focus lie? | Base: Stakeholders related to the river | n=43 | Multiple responses were possible.

OUTSIDE EUROPE



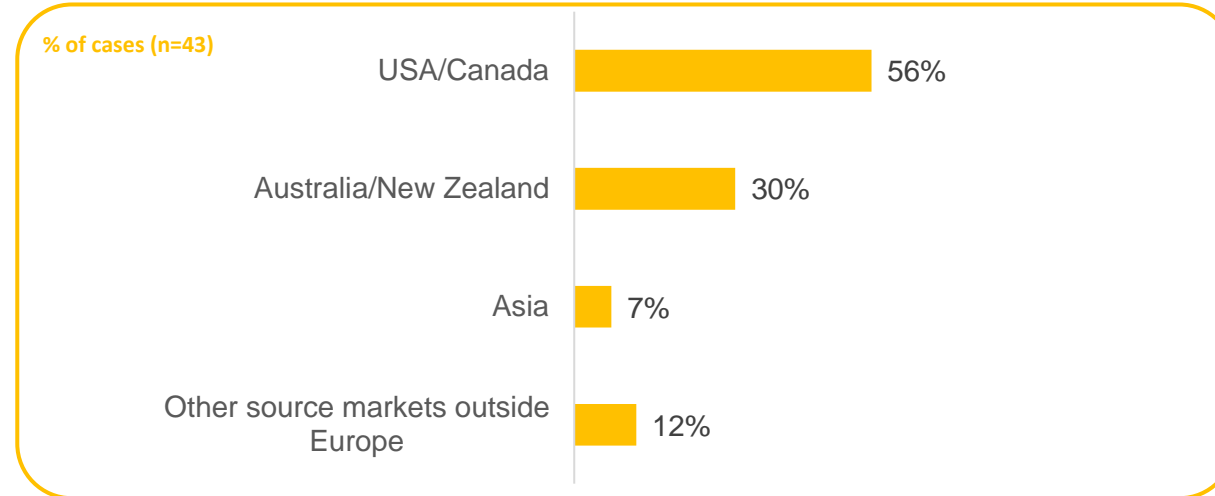
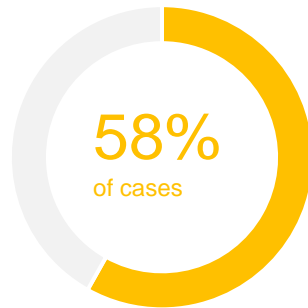
IN EUROPE



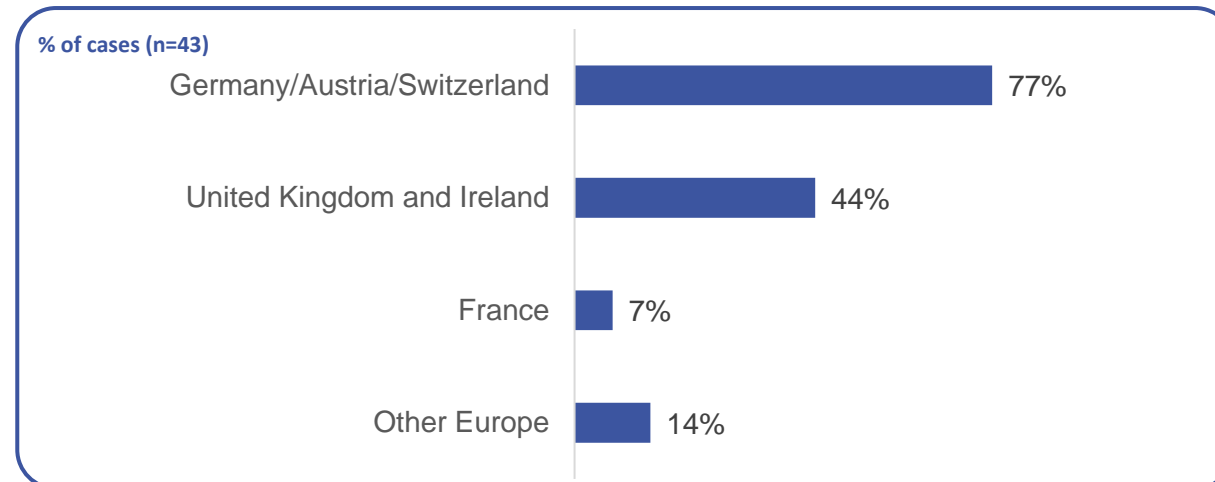
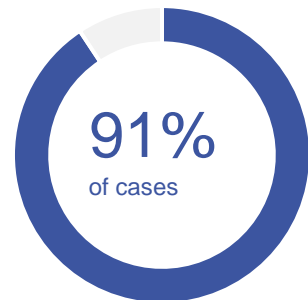
Important Source Markets

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OUTSIDE EUROPE



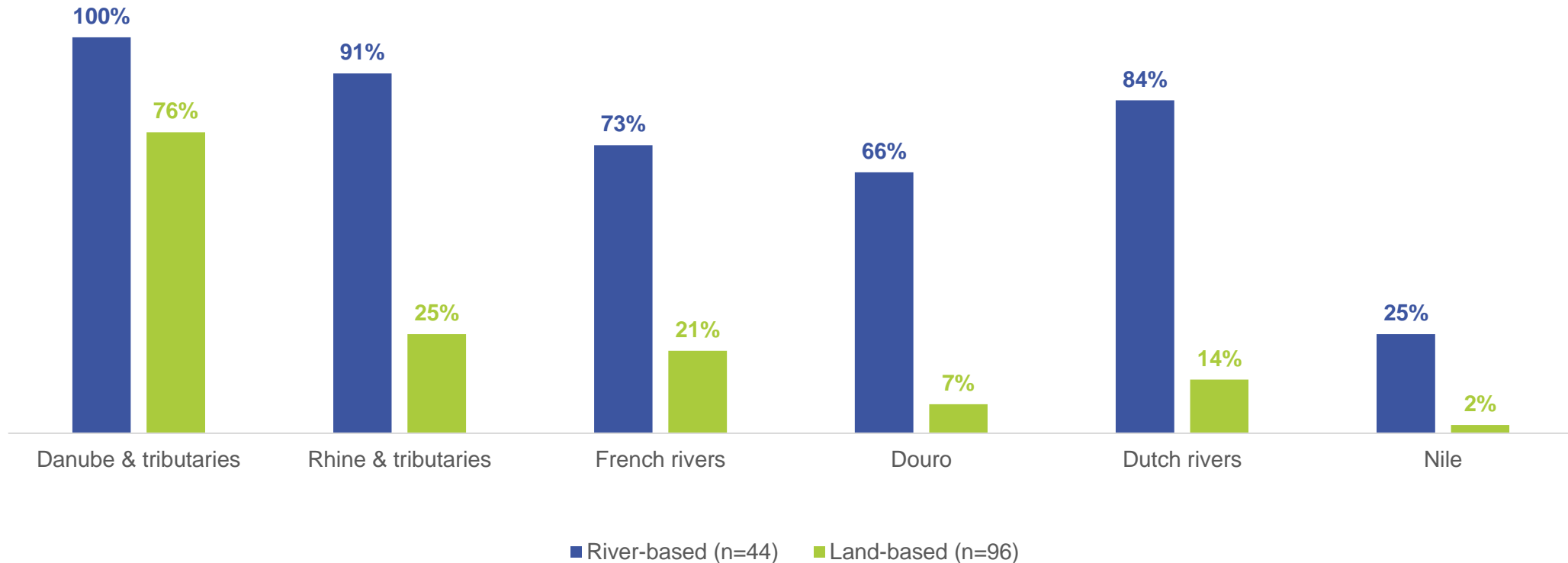
IN EUROPE



Relevant Cruising Areas

F5 Please select the relevant cruising areas or destinations for your company/institution. | Base: All respondents | n=140 | Multiple responses were possible.

% of cases



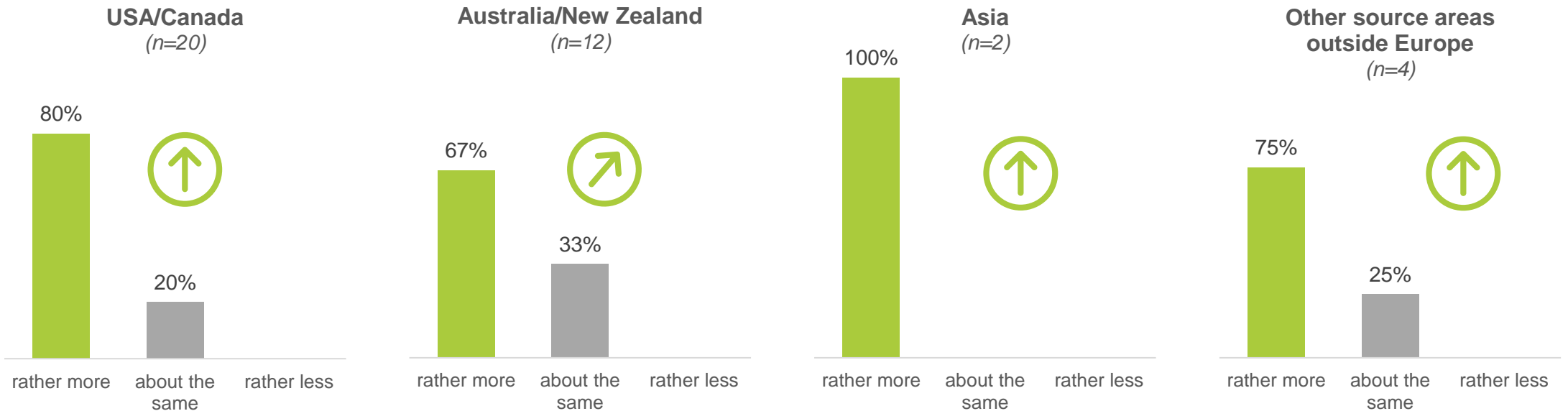
Development of Passenger Numbers

F6_D: Based on the current situation with bookings: How do you estimate the development of passenger numbers for the 2025 season compared to the 2024 season for the Danube? Please answer with regard to your fleet or the fleet for which you provide a service and differentiate between the source areas.

Base: River-based stakeholders with corresponding relevance to the travel areas

Danube – Source Areas outside Europe

Expected number of passengers for 2025 compared to 2024



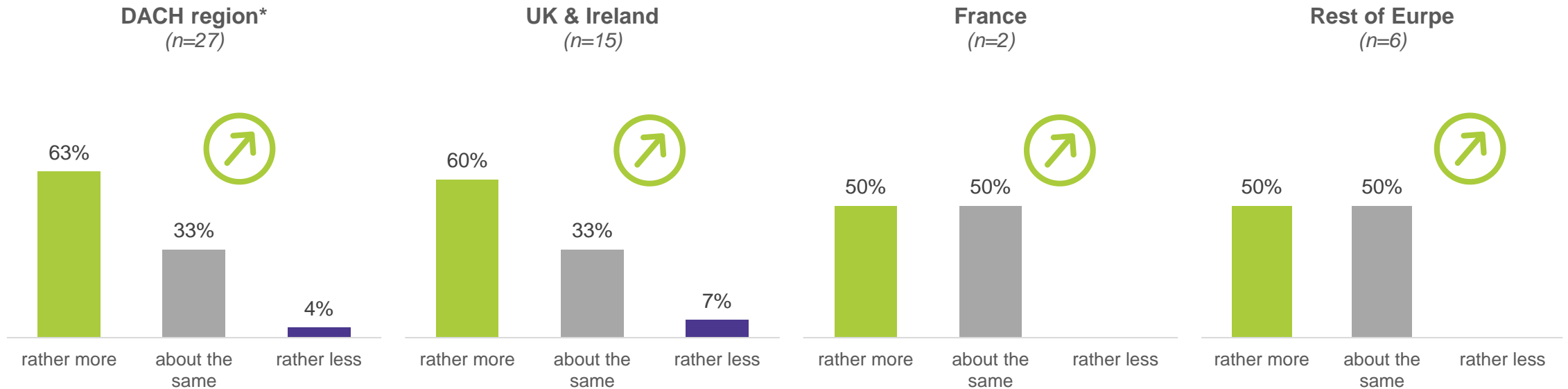
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Base: River-based stakeholders with corresponding relevance to the travel areas

Danube – European Source Areas

Expected number of passengers for 2025 compared to 2024



*includes Germany, Austria and Switzerland.

PAX 2025 vs. 2024 – Overview

Base: River-based stakeholders with corresponding relevance to the travel areas

	DANUBE	RHINE	FRENCH RIVERS	DOURO	DUTCH RIVERS
USA/Canada	↑ (20)	↑ (18)	↑ (18)	↑ (17)	↑ (17)
Australia/New Zealand	↗ (12)	↑ (12)	↗ (12)	↗ (10)	↗ (12)
Asia*	↑ (2)	↗ (2)	↑ (1)	↑ (1)	↑ (1)
Others*	↑ (4)	↑ (4)	↑ (4)	↗ (4)	↑ (4)
DACH region	↗ (27)	↗ (24)	↗ (18)	↗ (15)	↗ (21)
UK & Ireland	↗ (15)	↗ (15)	↗ (13)	↗ (11)	↗ (15)
France*	↗ (2)	→ (2)	→ (2)	→ (2)	→ (2)
Others*	↗ (6)	↗ (6)	→ (2)	↗ (2)	↗ (6)

**Low number of cases!*

Number of cases (n)

↑ (12)

75% and more indicate "increasing PAX".



Challenges & Measures for Better Cooperation



"Please select from the following list the biggest challenges you face in the river cruise sector. "

up to 5 responses possible

587 responses

from 135 people

in 5 categories

Biggest Challenges

F7 Please select from the following list the biggest challenges you face in the river cruise sector. You can select up to 5 challenges. | Base: All respondents

587 responses



Infrastructure

170 responses

1

2

Environment & Sustainability

130 responses



Economic efficiency

124 responses

3

4

Other

115 responses



Communication

48 responses

5

Top Mentions by Category

Infrastructure



- **Infrastructure in the cities** (access routes, bus capacities, public transport...) [58 mentions]
- **Availability of centrally located moorings** [46 mentions]
- **Possibility of hotspot dispersal** [31 mentions]

Environment & Sustainability



- Challenges with **low/high water levels** [76 mentions]
- **Product adjustments regarding environmental measures** [25 mentions]
- Availability of **shore power** [23 mentions]

Economic efficiency



- **General inflation / price increases** [49 mentions]
- **Expansion of regional value creation** [42 mentions]
- **Cost development** regarding sustainable investments [33 mentions]

Other



- **Staff shortages and lack of skilled labor** [63 mentions]
- **Reputation problems or acceptance issues** of the entire industry [35 mentions]

Communication



- **Access to the right contacts on the river side** [33 mentions]
- **Access to the right contacts on the land side** [6 mentions river side, 9 mentions land side]

Biggest Challenges 2023



Measures along the Danube

Base: River-based stakeholders

"For each of the following measures, please indicate how intensively they are already implemented in your company for journeys along the Danube."



Measures along the Danube

F8 For each of the following measures, please indicate how intensively they are already implemented in your company for journeys along the Danube.

Base: River-based stakeholders

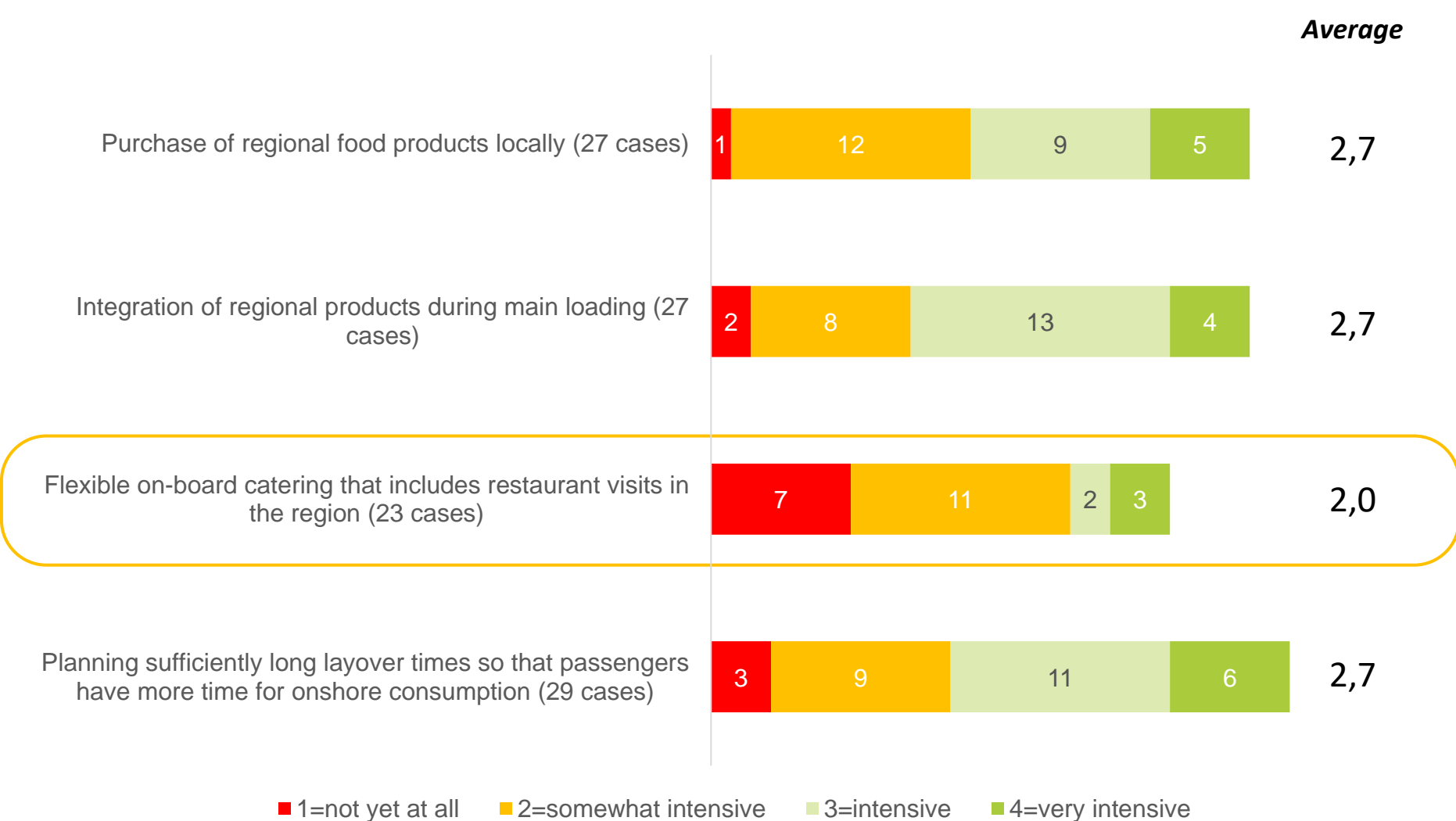


Scale

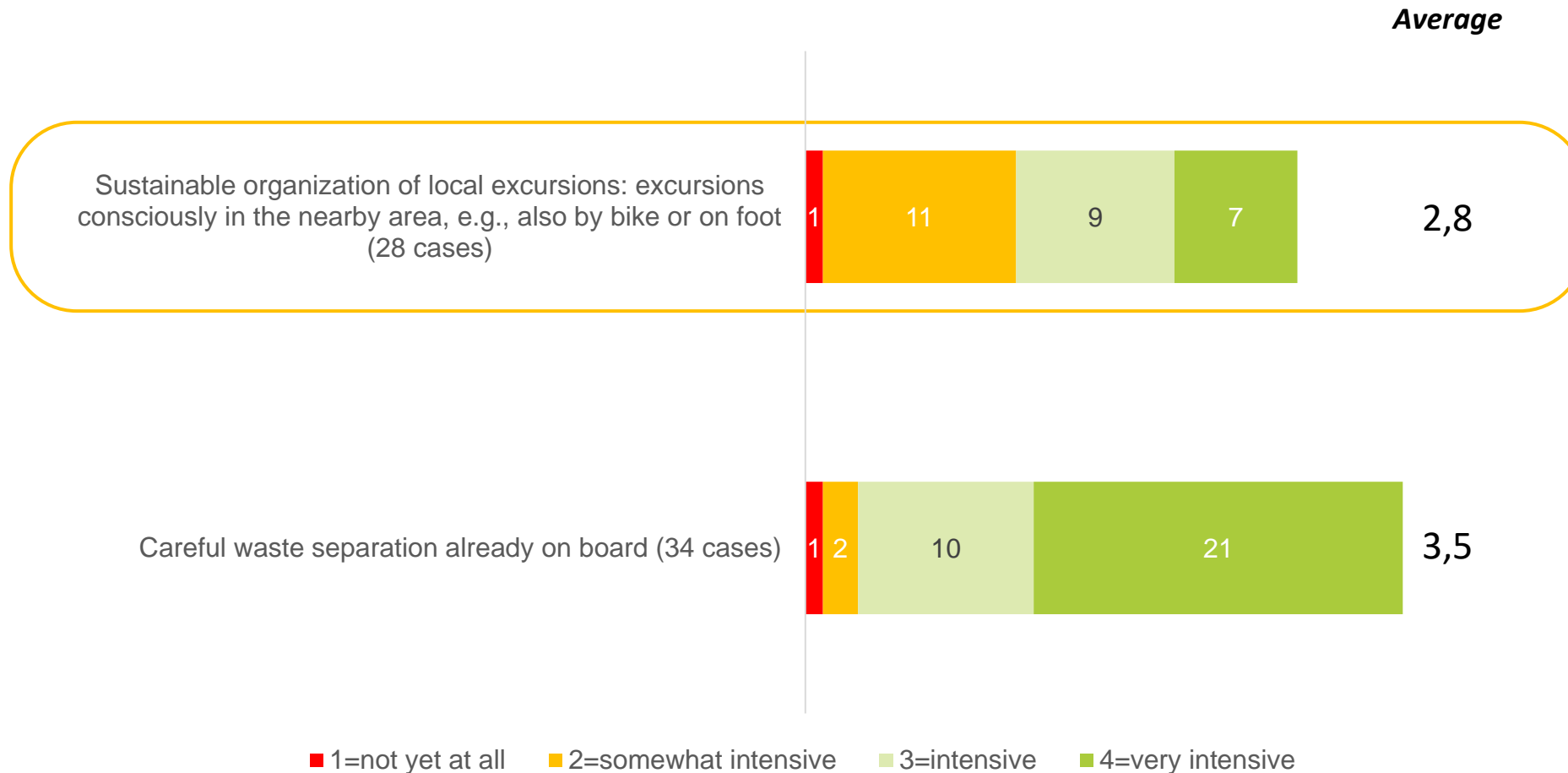
- 1 not yet at all
- 2 somewhat intensive
- 3 intensive
- 4 very intensive

Regional Value Creation

Base: River-based stakeholders

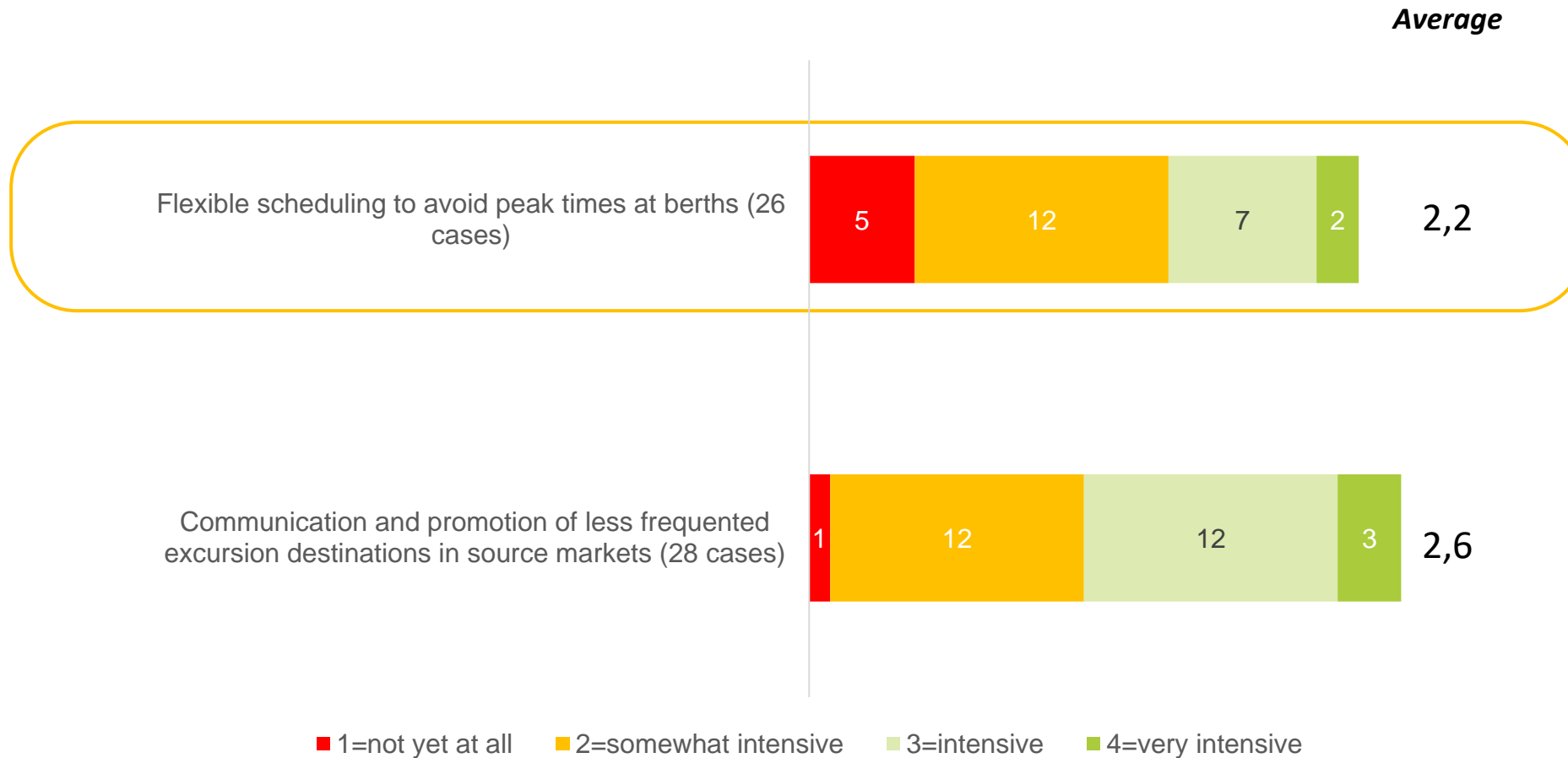


Base: River-based stakeholders



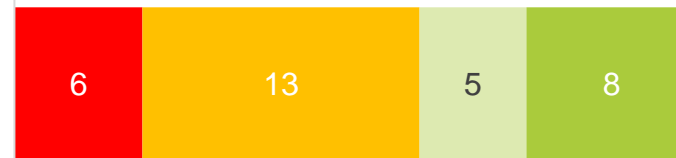
Visitor Management

Base: River-based stakeholders



Base: River-based stakeholders

Active contact with decision-makers in destinations, e.g., tourist organizations, politicians, authorities, etc. (32 cases)



Average

2,5

Measures to improve interaction between passengers and locals, e.g., open ship day (32 cases)



2,2

■ 1=not yet at all ■ 2=somewhat intensive ■ 3=intensive ■ 4=very intensive

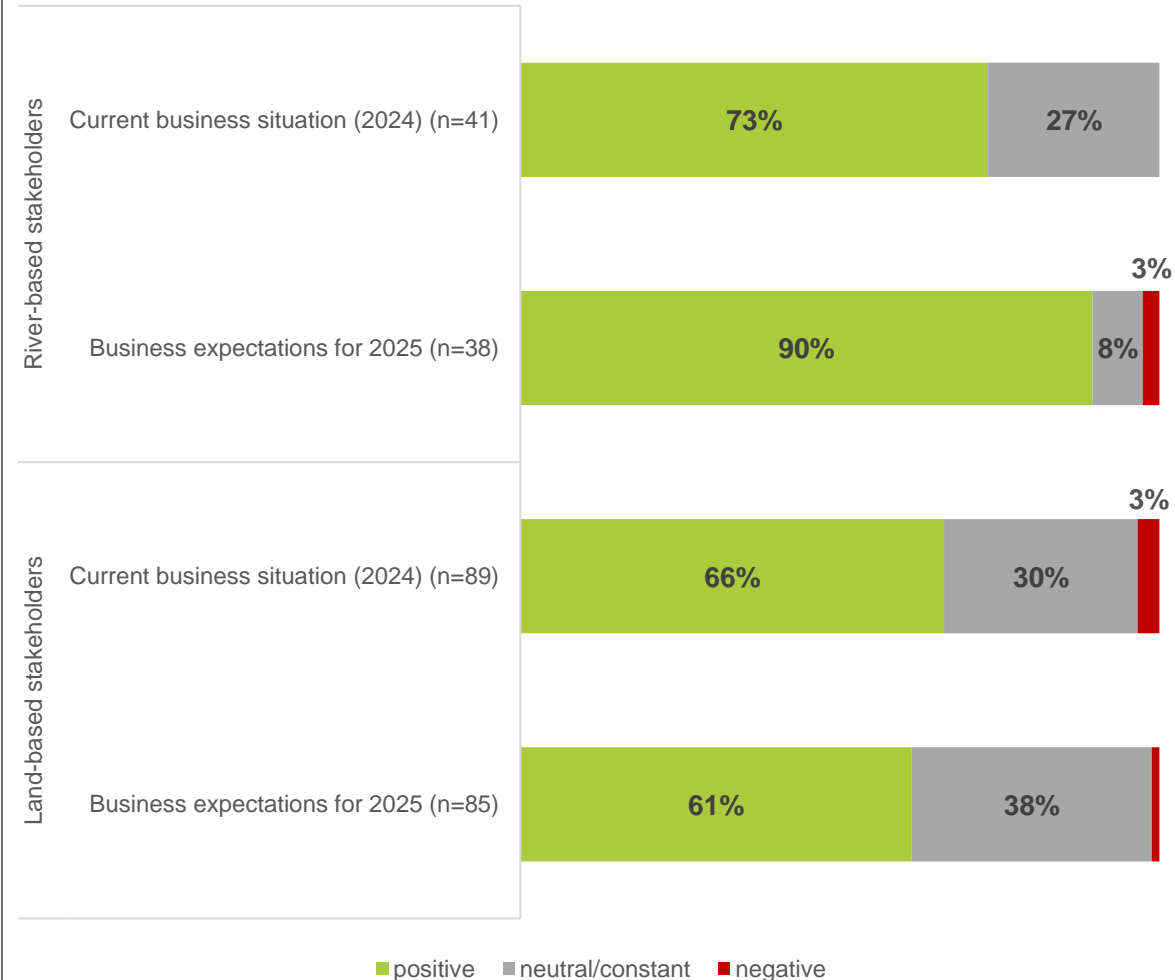




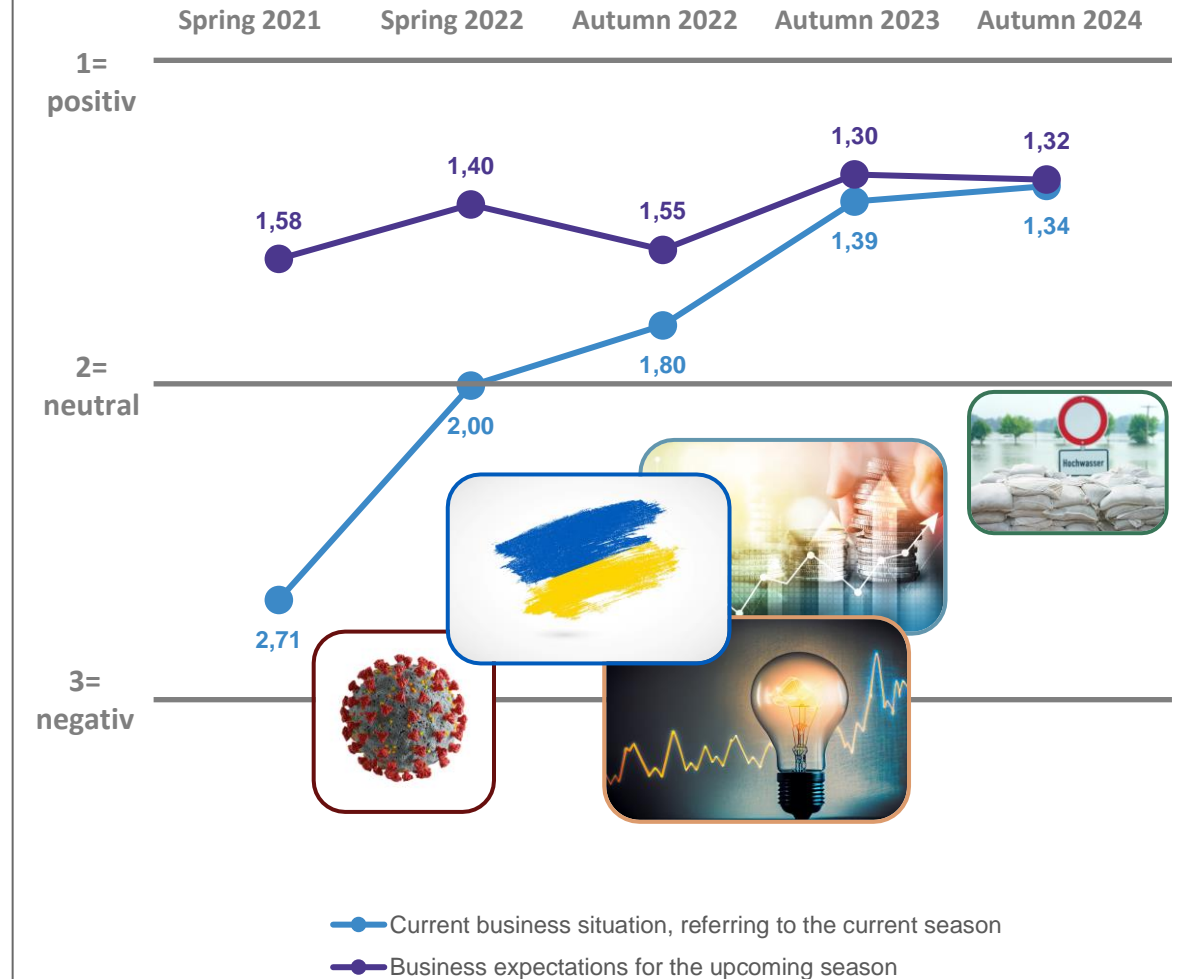
Business Situation & Industry Sentiment

Business Situation and Expectations

F10 Please rate the following aspects in general in relation to your company/institution on a scale from "1=positive", "2=neutral or constant" to "3=negative":



Time comparison – Averages [Scale from 1 = positive, 2 = neutral, 3 = negative]



Please describe the current mood in your company or institution
with regard to river cruises.

relaxed – neither – tense
secure – neither – insecure
confident – neither – hopeless

Please describe the current mood in your company or institution with regard to river cruises.

Base: All respondents | n=140

relaxed – neither – tense
secure – neither – insecure
confident – neither – hopeless

Net-Mood-Score

Percentage "positive outcome" (green)

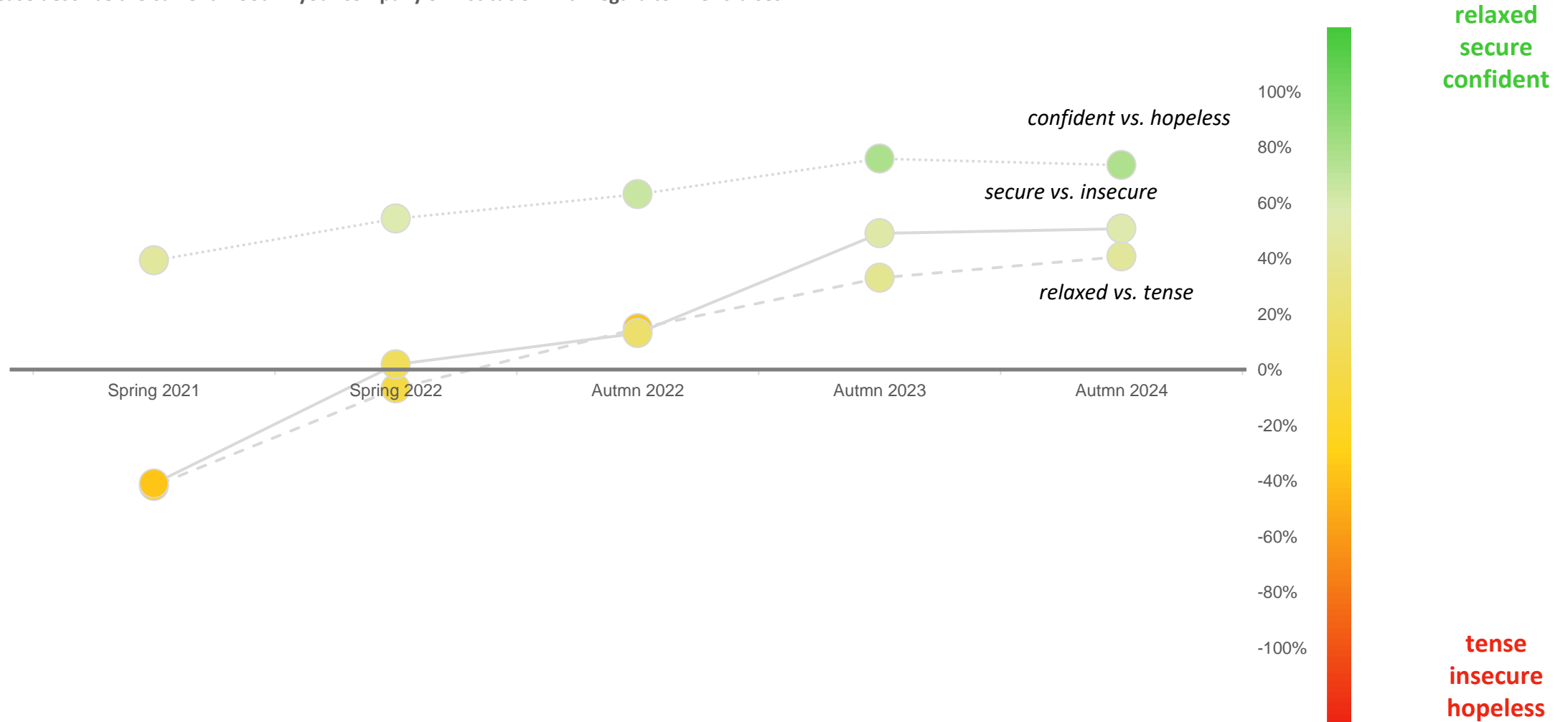
–

Percentage "negative outcome" (red)

→ The larger the positive difference,
the better the sentiment!

Industry Sentiment - Time Comparison

F11 Please describe the current mood in your company or institution with regard to river cruises.

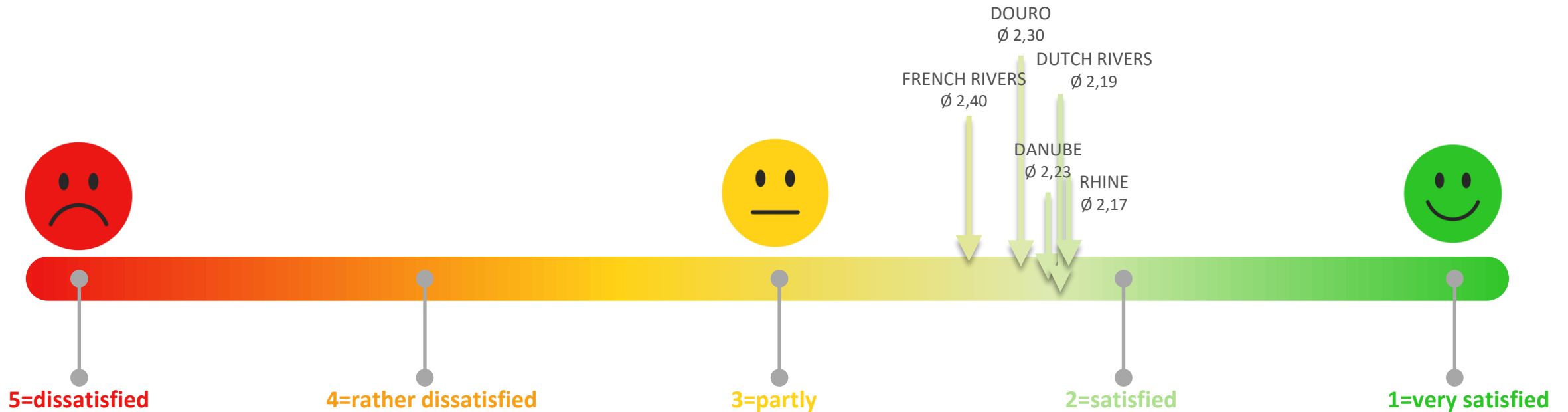


Values: Net-Mood-Score: Share of 'positive outcome' – Share of 'negative outcome' (→ the larger, the better)

Collaboration of Stakeholders

F12 How satisfied are you with the cooperation with partners and stakeholders in the river cruise industry along the...

Scale: 1=very satisfied, 2=satisfied, 3=partly, 4=rather dissatisfied, 5=dissatisfied | $n_{\text{Danube}}=109$, $n_{\text{Rhine}}=60$, $n_{\text{French Rivers}}=48$, $n_{\text{Douro}}=33$, $n_{\text{Dutch Rivers}}=48$



Danube

The **river-based stakeholders** signal a generally **higher level of satisfaction** than the **land-based stakeholders**.

(river-based: \emptyset 2,03 | land-based: \emptyset 2,35)



(Averages on a scale from 1 = very satisfied to 5 = dissatisfied; $n_{River}=40$, $n_{Land}=69$)

"How do you think communication among stakeholders can be optimized?"

Open question

37 responses

from **37** people

(6 x river based,
31 x land based)

in **5** categories

Suggestions for Improvement

F13 How do you think communication among stakeholders can be optimized?

Base: All respondents | 37 cases – 37 responses

Enable communication (14 mentions) | Examples



- Central (digital) platform
- Shared use of real-time data
- Create more contact opportunities
- Working groups
- Mini fairs
- Stronger presence of RCE and IGRC
- IGRC should represent the industry in the destinations
- Establish cruise clubs (e.g. Rhône-Saône)

Regular exchange (7 mentions)



- Better communication levels
- Regular online formats
- Regular industry meetings
- Personal exchange
- Divide stakeholders by regions and exchange regularly
- Annual format
- More frequent, clearer, more strategic

Communication with the right people (10 mentions) | Examples



- Emergency numbers for the weekend (high/low water levels)
- Clear, correct contacts
- Find the right contacts through the platform
- Bring the right people together
- More exchange – there are no contact details
- Data sharing between shipping companies & partners
- Direct communication with decision-makers (product managers!)
- Access to tour operators to better understand customer needs

Honesty / Transparency (2 mentions)



- Take guide feedback seriously and consider it
- Openness, honesty

4 other mentions (Better familiarization with excursion destinations; organizing informational tours | Do not send all groups to the same program at the same time | Amsterdam Harbour | Training of new guides specifically for river cruises)



Panel Topics

Visitor Management – Artificial Intelligence – Sustainability – Staffing Situation

(Guest) Wishes

Best moorings...



...at the best time



...in TOP destinations!



Lower prices

Can we...

... increase the demand for **less centrally located moorings** with lower prices?



... increase the demand for **less 'popular' travel times** at centrally located moorings with lower prices?



... increase the demand for **less frequented destinations** with lower prices?



... increase the demand for **less centrally located moorings** with lower prices?



... increase the demand for **less 'popular' travel times** at centrally located moorings with lower prices?

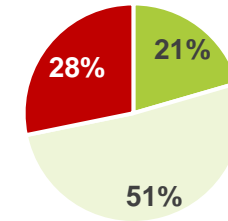


... increase the demand for **less frequented destinations** with lower prices?



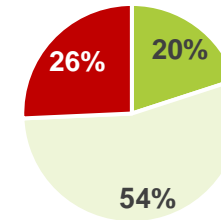
Base: River-based respondents

n=39 (out of 43)



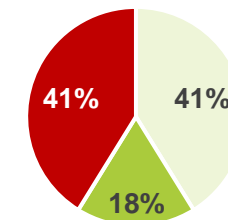
- Yes, in general
- Yes, if there's no other option
- No

n=35 (out of 43)



- Yes, in general
- Yes, if there's no other option
- No

n=34 (out of 43)



- Yes, hotspots would still be visited
- Yes, less frequented excursion destinations would be visited
- No

Can we ...



... increase the demand for **less centrally located moorings**...



... increase the demand for **less 'popular' travel times** at centrally located moorings...



... increase the demand for **less frequented destinations**...



Yes, but mostly spontaneously in case of **shortages!**

Probably not; if it worked, the **hotspots would still be visited** anyway.

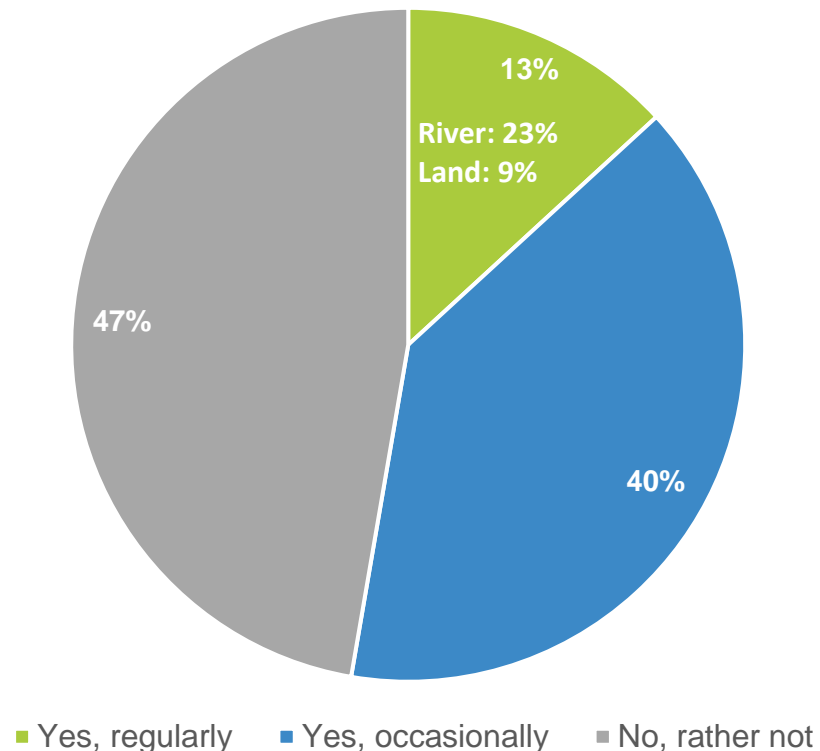
... with **lower prices?**



"Do you deal with AI applications in your day-to-day business, i.e. applications in the field of artificial intelligence?"

F14 Do you deal with AI applications in your day-to-day business, i.e. applications in the field of artificial intelligence?

Base: All respondents | n=129



AI has **partially** become **part of the daily business** in river cruising!

(Stakeholders based on the river have indicated more frequently than those based on land that they regularly deal with AI applications.)*

**A significant difference in this manifestation at a 5% significance level.*

"Please complete the following sentence by clicking on one of the following terms: We work _____ in accordance with our sustainability strategy."

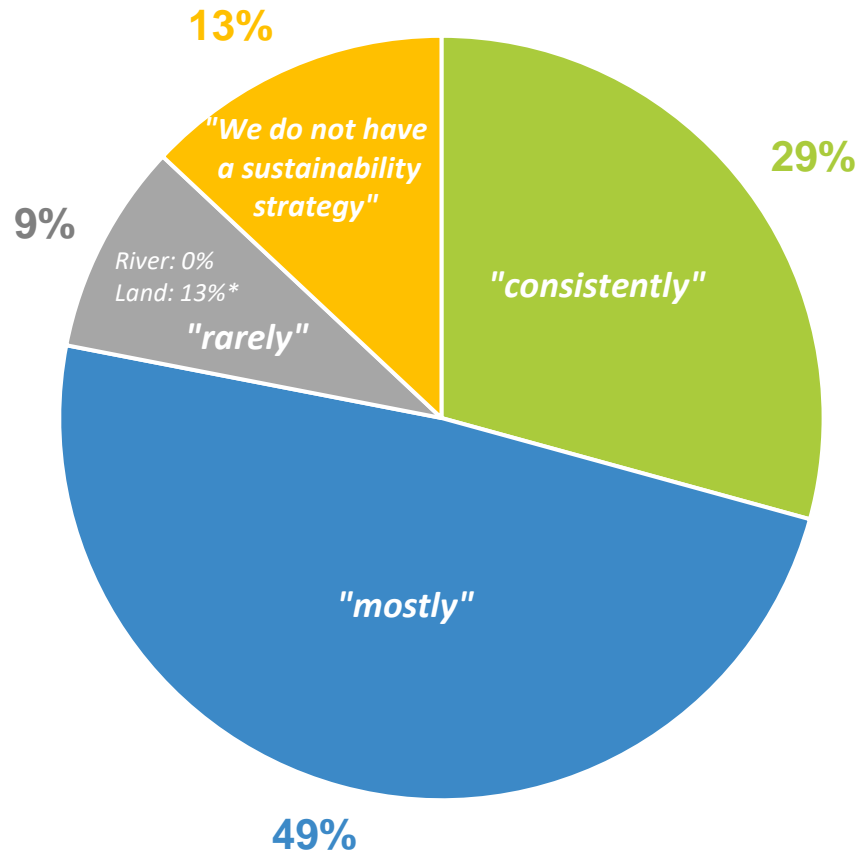
Terms: consistently / mostly / rarely

Alternative: We do not have a sustainability strategy.

Sustainability Strategy

F15 Please complete the following sentence by clicking on one of the following terms: "We work _____ in accordance with our sustainability strategy."

Base: All respondents | n=123



Three out of ten river cruising stakeholders work **consistently** according to their own sustainability strategy.

Stakeholders based on the river tend to indicate 'consistent' more frequently than stakeholders based on land.

*Significant difference at a 5% significance level.

→ Should there be a **CO₂ levy** for river cruising?

→ **Who** should **impose and manage** the CO₂ levy?

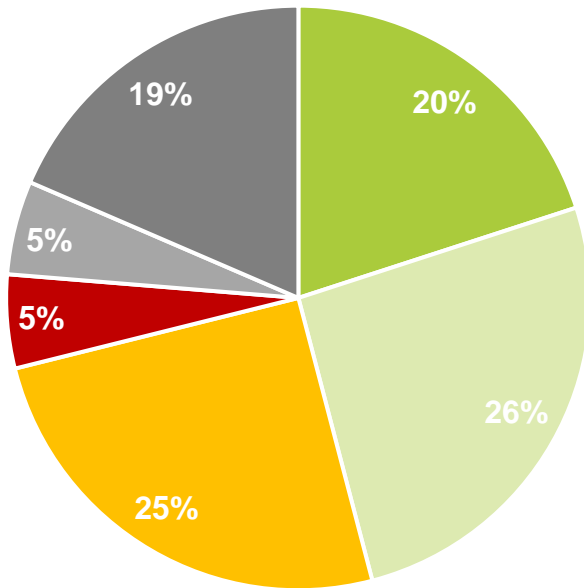
→ **What** should the CO₂ levy be **used for**?



F17 How would you assess a mandatory CO₂ levy for river cruises, comparable to Lufthansa's planned CO₂ levy starting in January 2025?

Base: All respondents | n=135

→ Should there be a **CO₂ levy** for river cruising?



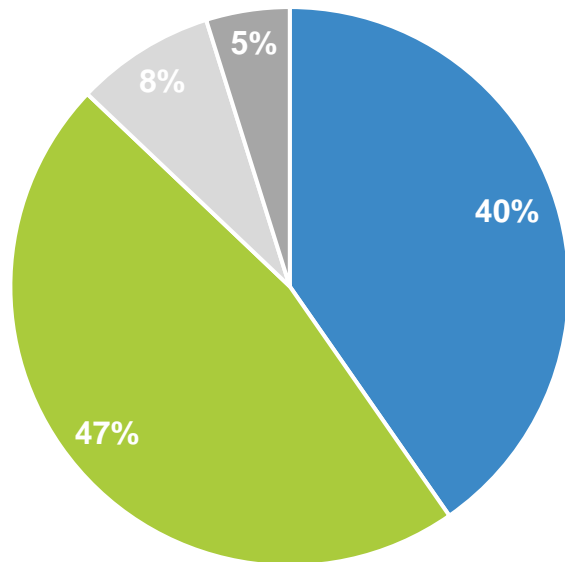
Almost every second respondent supports this!

(No significant differences between land-based and river-based stakeholders!)

- I strongly support it.
- I am rather skeptical about it.
- Don't know
- I might support that.
- I reject it.
- No specification

F18 In your opinion, who should levy and manage a CO₂ levy? | Base: All stakeholders who support a CO₂ levy | n=62

→ Who should **impose and manage** the CO₂ levy?



- Individual organizations
- superordinate organization or industry associations
- Don't know
- No specification

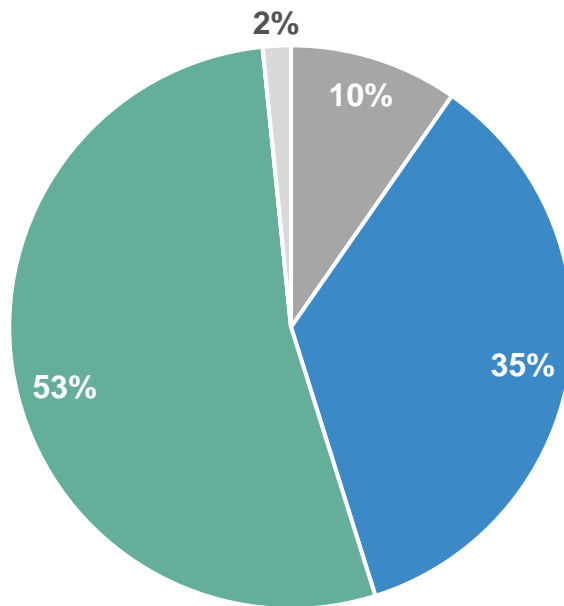
Both options are conceivable –

a levy collection by individual organizations and by umbrella organizations or industry associations.

(Again, no significant differences between river-based and land-based stakeholders!)

F19 What do you think a CO₂ levy should be used for? | Base: All stakeholders who support a CO₂ levy | n=62


→ **What** do you think a CO₂ levy should be **used for**?



- Exclusively for general compensation projects
- Exclusively to finance environmental requirements within the industry
- Both
- No specification

The CO₂ levy should be used **both** for general compensation projects **and** to fund environmental requirements within the industry.

(Again, no significant differences between river-based and land-based stakeholders!)

A photograph of five business professionals (three women and two men) sitting on wooden stools in a row. They are dressed in professional attire, including blouses, jackets, and suits. The image is partially obscured by a white text box.

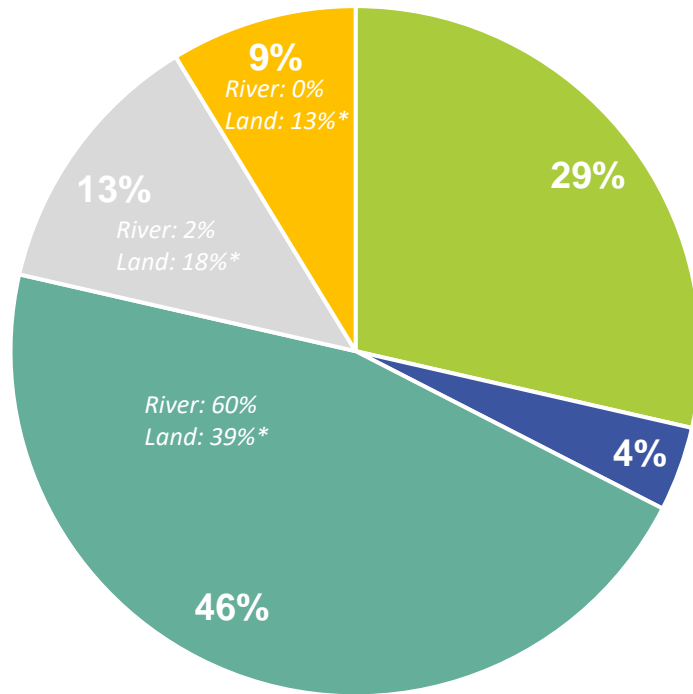
"What is the current situation regarding recruitment in your organization?"

5 possible statements, from which one was to be selected:

qualitative problem – quantitative problem – both – no difficulties – not assessable, as there is currently no personnel demand

Staffing Situation

F16 What is the current situation regarding recruitment in your organization? | Base: All respondents | n=126



Primarily a **qualitative** staffing issue, often accompanied by quantitative challenges.

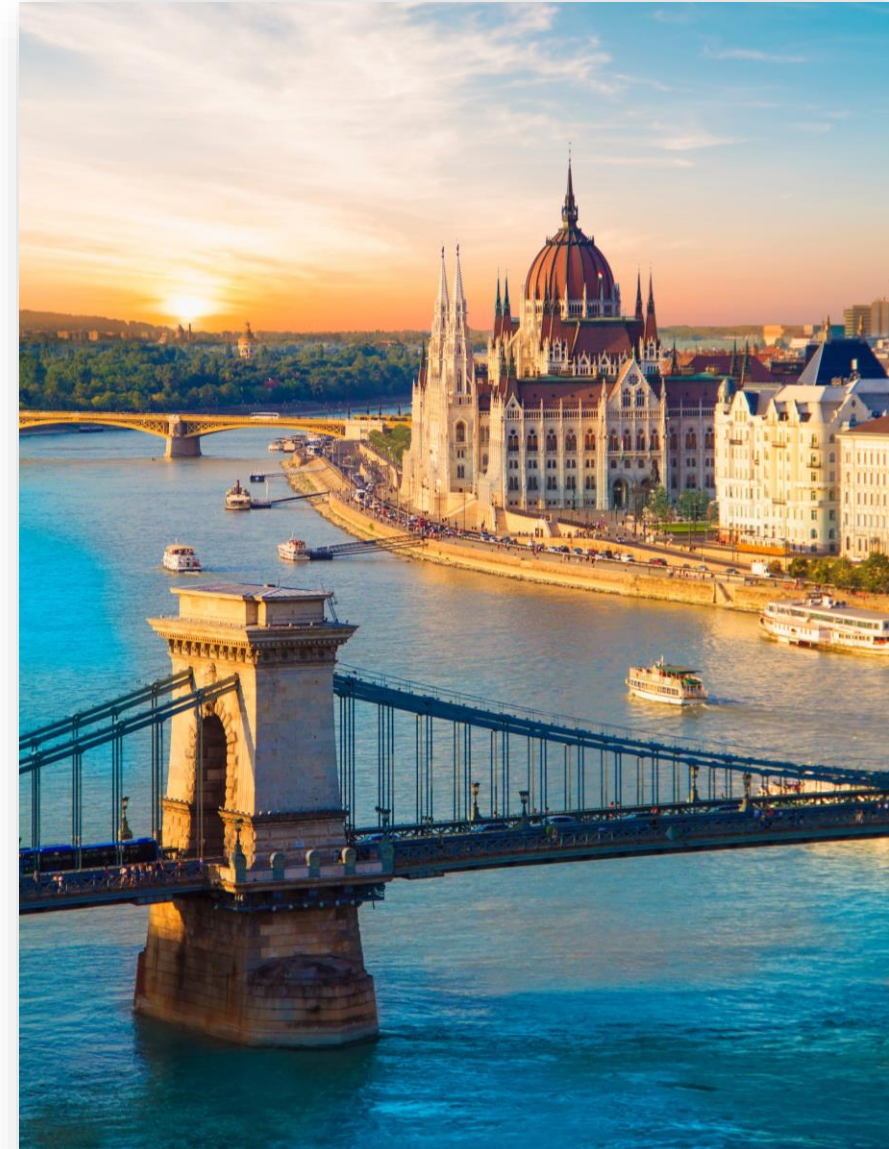
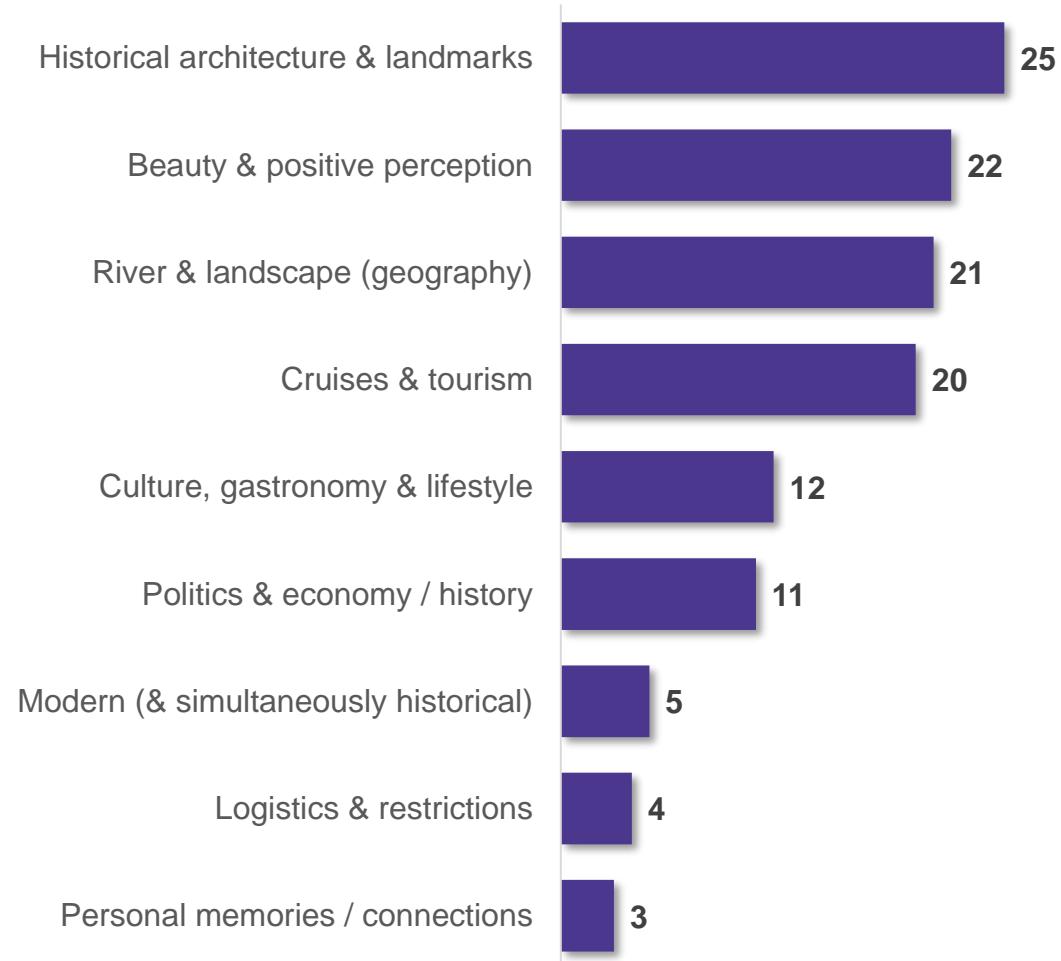
■ mainly qualitative ■ mainly quantitative ■ both ■ no difficulties ■ unable to assess

*Significant difference at a 5% significance level.

**What do you associate with
Budapest?**

Budapest - Associations (Categories)

F20 And now one last question: What do you associate with Budapest? | 123 responses from 96 people



The results are now available at

<https://www.centouris.de/aktuelles/news/>

Thank you for your attention!

Would you like to be part of our
industry panel?

→ Simply scan the QR code and
register!





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