



River cruise
Industry survey
Autumn 2023



...to the support team

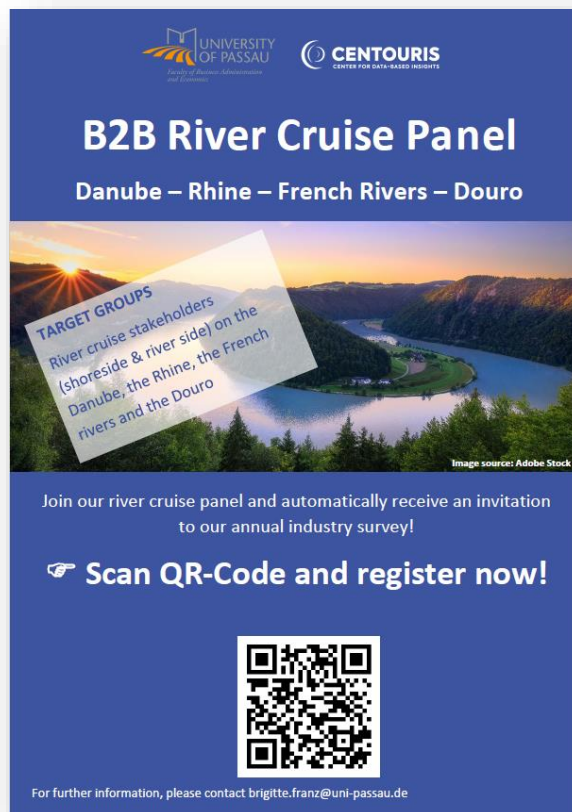
- Prof. Gerhard Skoff
- Prof. Christoph Madl
- Mag. Bernhard Schröder, Werner Fankhauser, Petra Riffert CSE (ARGE Donau Kreuzfahrten Österreich)
- Monic van der Heyden & Andreas Plank (River Cruise Europe)

...and especially

**many thanks to
everyone who took
part in the survey!**



PANEL-REGISTRATION



UNIVERSITY OF PASSAU
CENTOURIS
CENTER FOR DATA-BASED INDUSTRY


B2B River Cruise Panel

Danube – Rhine – French Rivers – Douro

TARGET GROUPS
River cruise stakeholders (shoreside & river side) on the Danube, the Rhine, the French rivers and the Douro

Join our river cruise panel and automatically receive an invitation to our annual industry survey!


Scan QR-Code and register now!




For further information, please contact brigitte.franz@uni-passau.de

Register on the panel and receive regular invitations to the industry survey

Current Survey



ARGE DONAU KREUZFAHRTEN ÖSTERREICH
donau // ÖSTERREICH
DER FLUSS, DER BEWEGT.



Support with the distribution of the survey link



River cruise industry survey
Danube – Rhine – French Rivers – Douro

TARGET GROUPS
River cruise stakeholders (shoreside & river side) on the Danube, the Rhine and the French rivers

The results will be presented at the International Danube River Cruise and Tourism Conference in Linz (27-30.11.2022) in Melk and will then be available for free download at www.centouris.de

Scan QR code and go

2021

2022

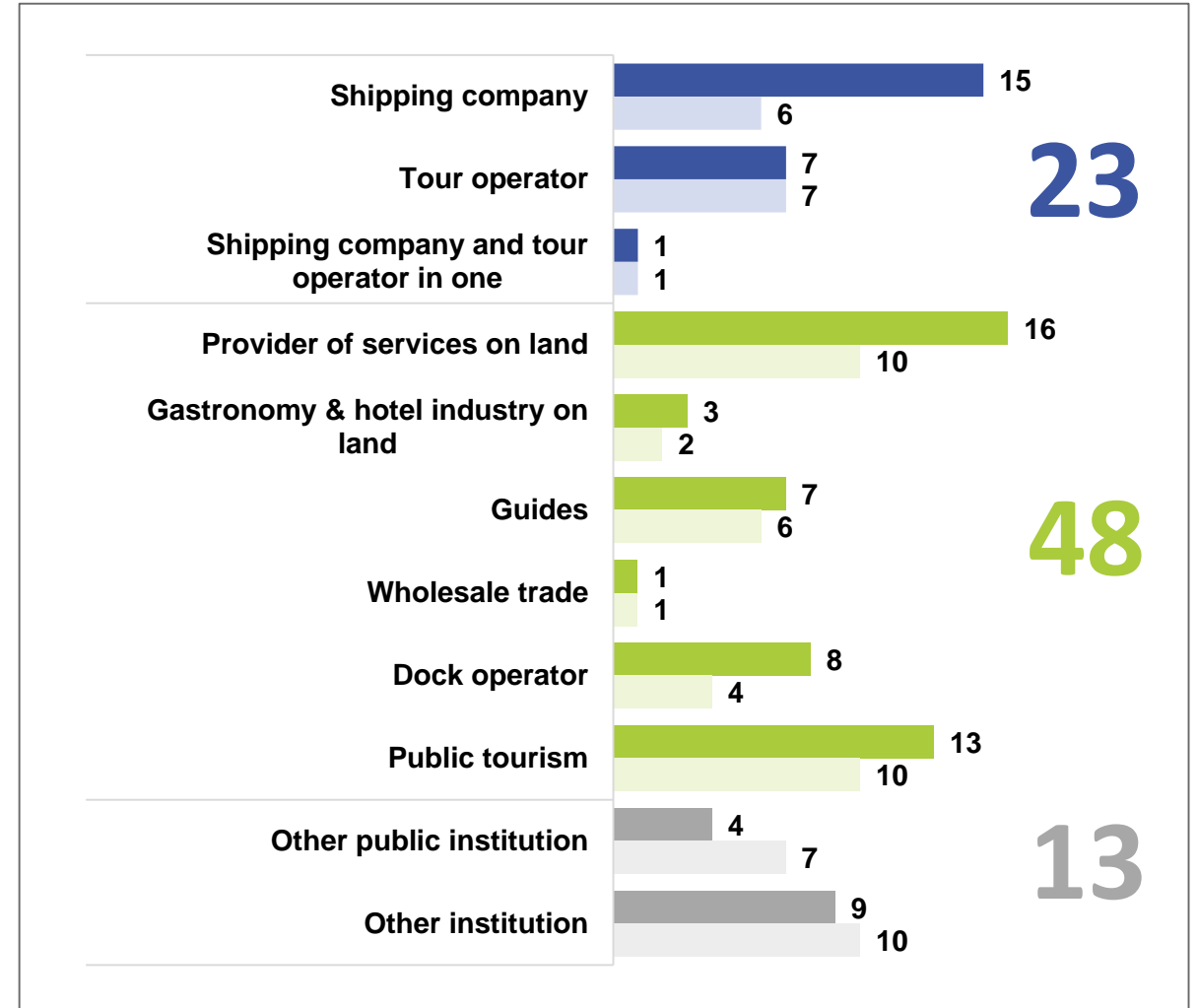
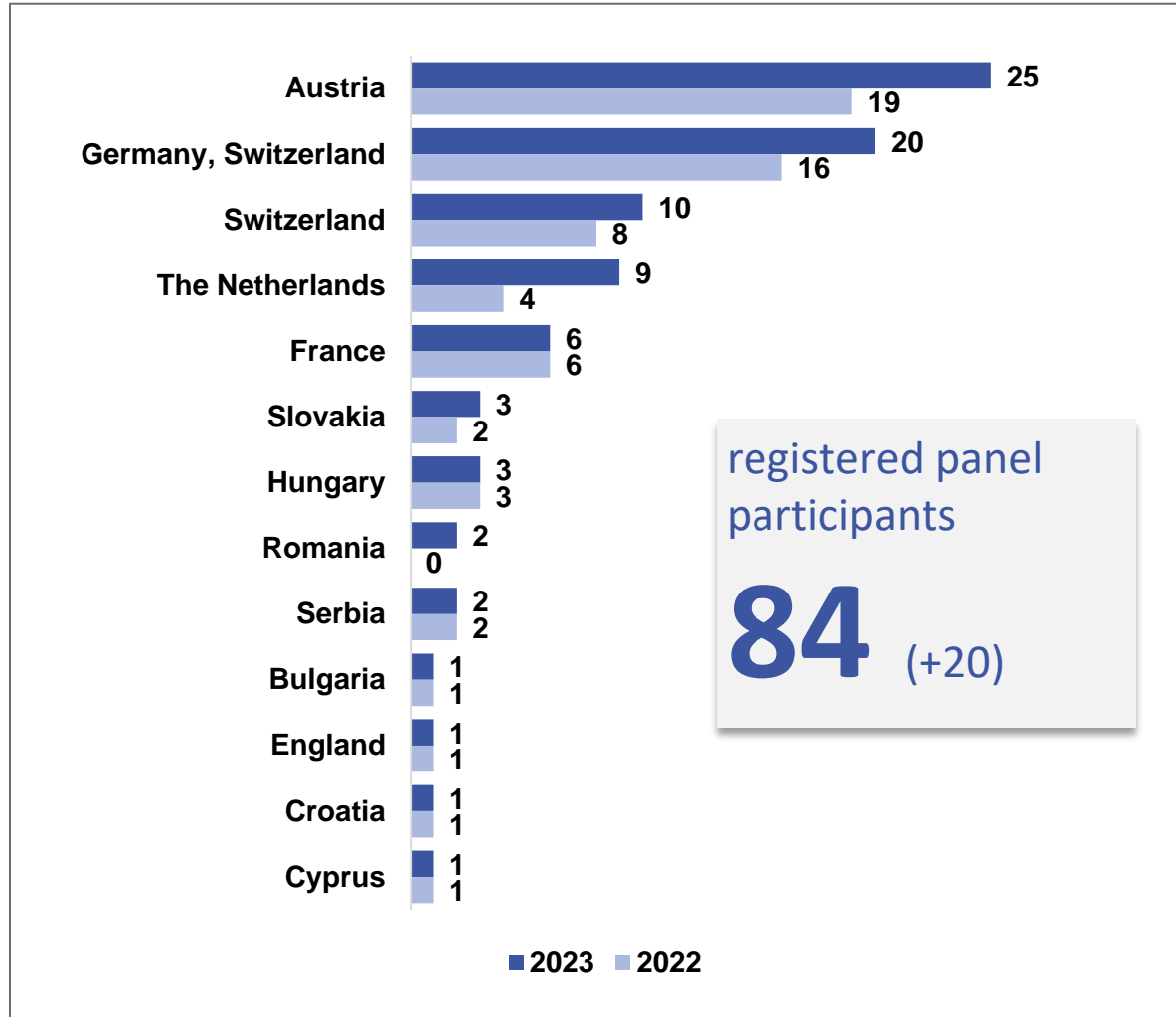
2023

Participation deadline: November 02, 2023

For further information, please contact brigitte.franz@uni-passau.de

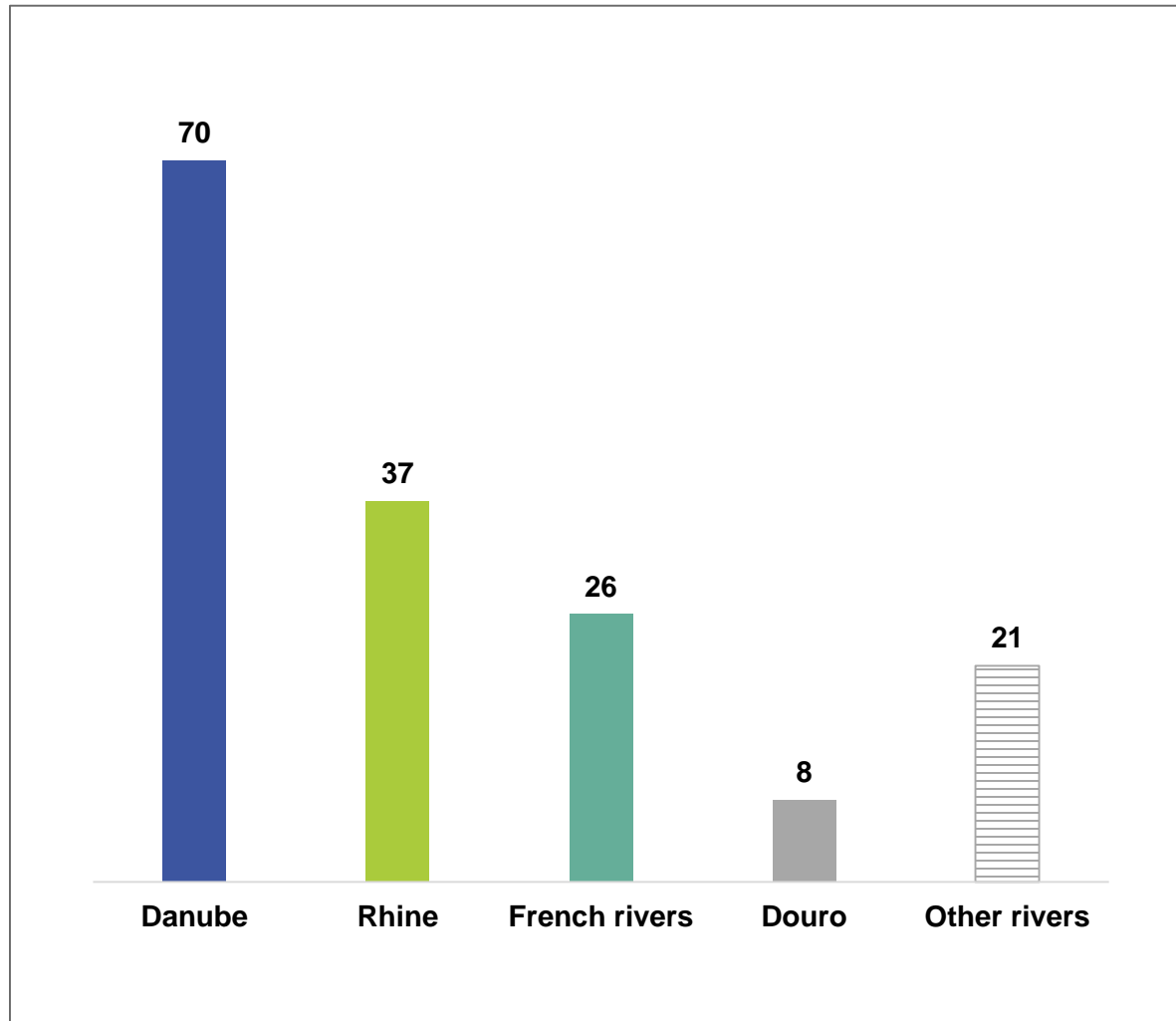
Panel-Structure

Land & Industry



Relevant Cruising Areas

n=84 | 162 Mentions



Other rivers

- General: all; all rivers in the EU
- Germany: Main (4), Main-Danube Canal (3), Moselle (2), Neckar (2), Elbe, Oder, Saar
- Rivers in the Netherlands
- Rivers in Belgium
- Italy: Po
- France: Seine
- England: Esk

Method



Online Survey



Target group: Companies/institutions with a direct or indirect connection to the river cruise industry



Focus: Danube, Rhine, French rivers, NEW: Douro

Sample



The sample includes 111 complete and 16 partial interviews with stakeholders who belong to the target group.

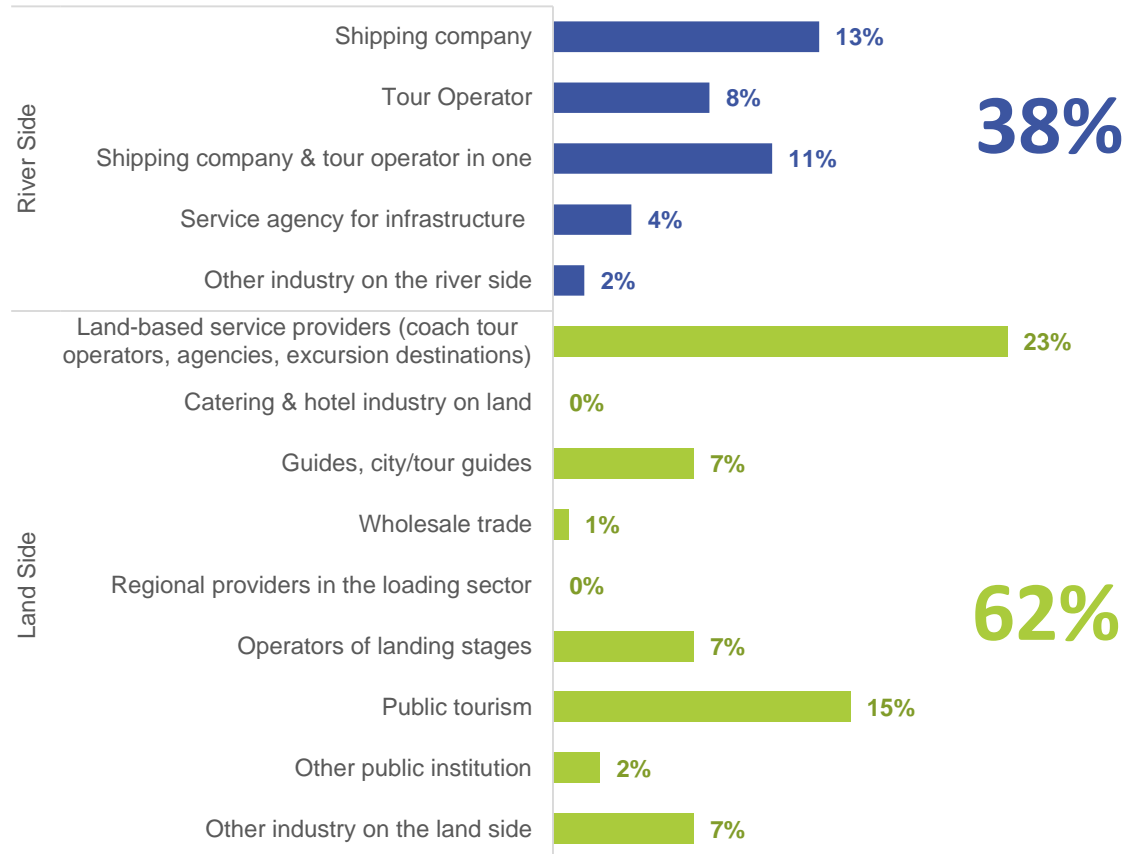
Survey period



15. August - 30. October 2023

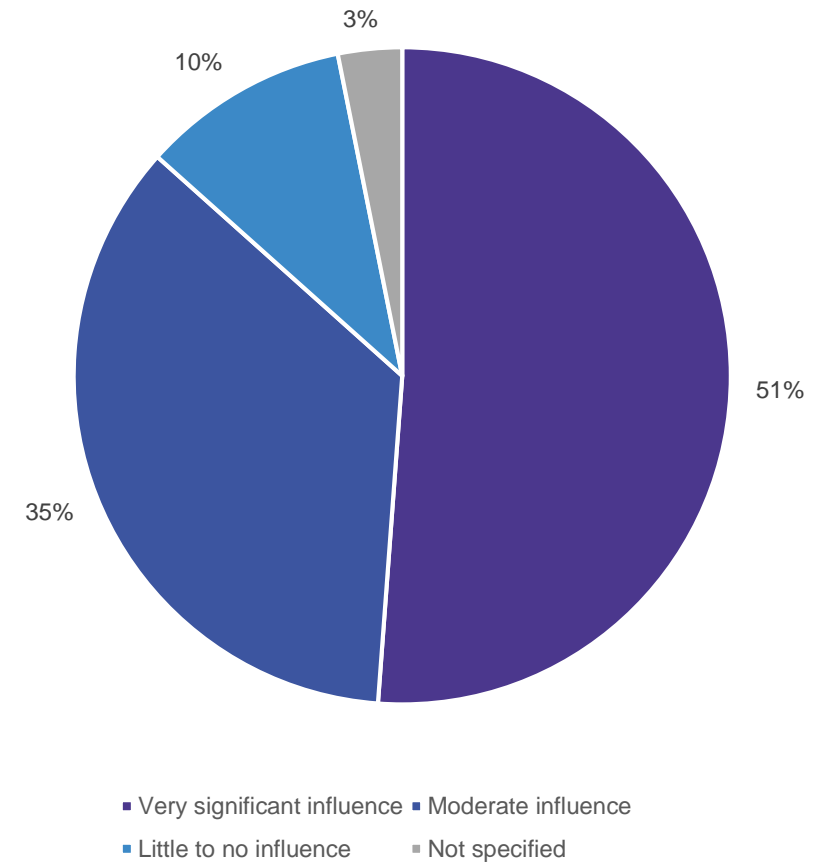
Industry & strategic influence

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



N=127, only one answer was possible

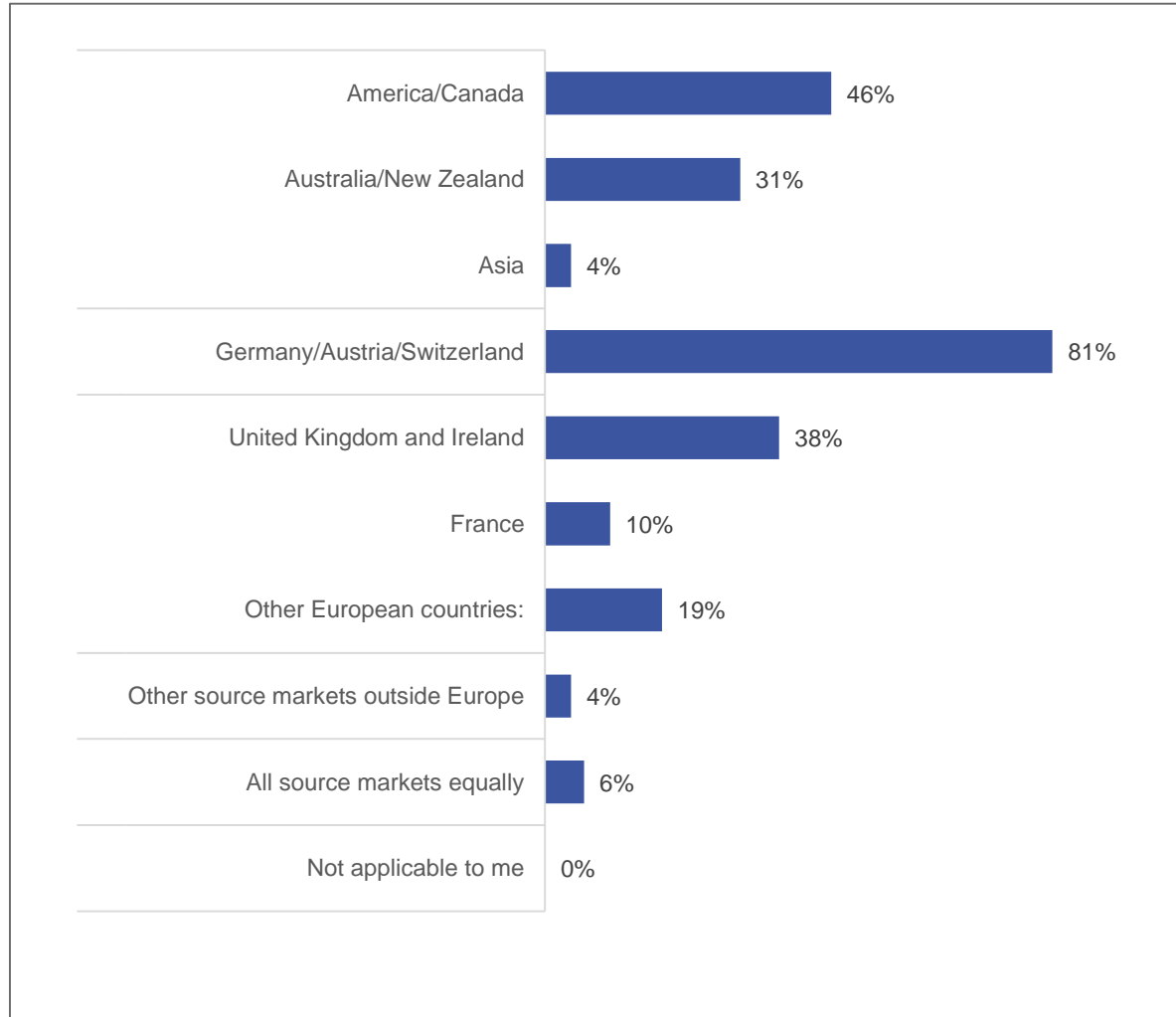
F2 What influence do you have in your company/organization regarding strategic decisions?



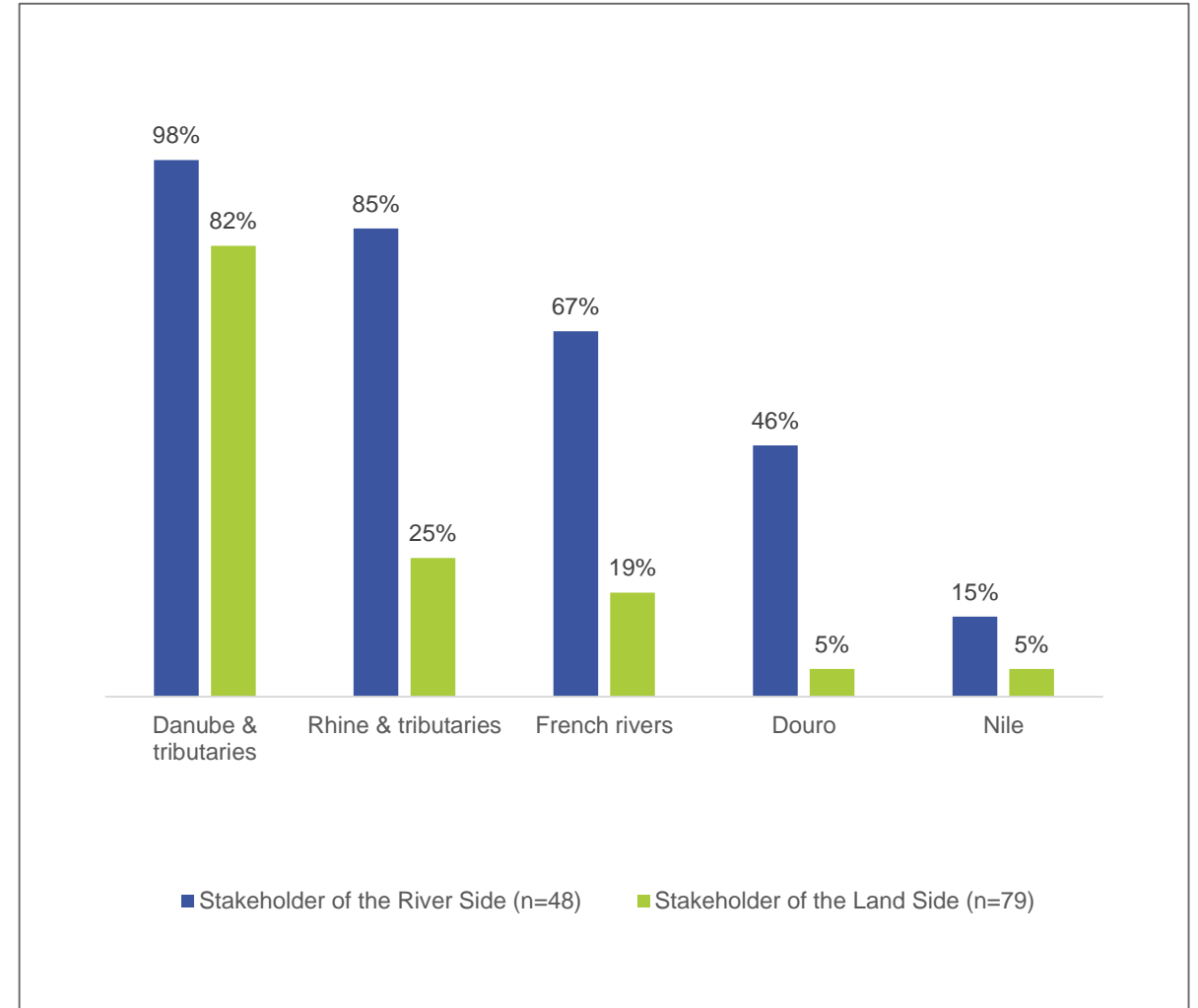
N=127

Important source markets & cruising areas

F4 Which source markets significantly influence your business success? Where is your focus?
 Base: Stakeholders of the river side | n=48 | Multiple answers were possible.

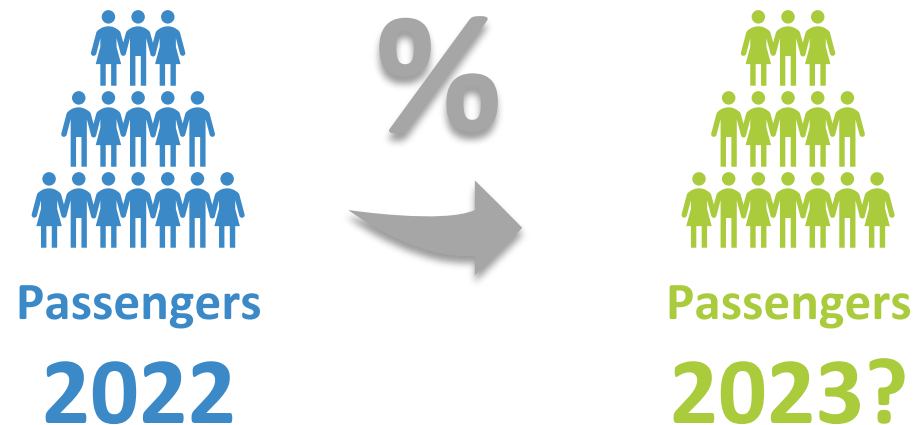


F3_2 Please select the relevant river navigation areas or destinations for your company/ organization.



Development of passenger numbers

Base: Stakeholders on the river side (n=48) with cruise area relevance



...on the **Danube**, on the **Rhine**, on the **French rivers**, on the **Douro**

...differentiated by the **source markets** USA/Canada, Australia/New Zealand, DACH,...

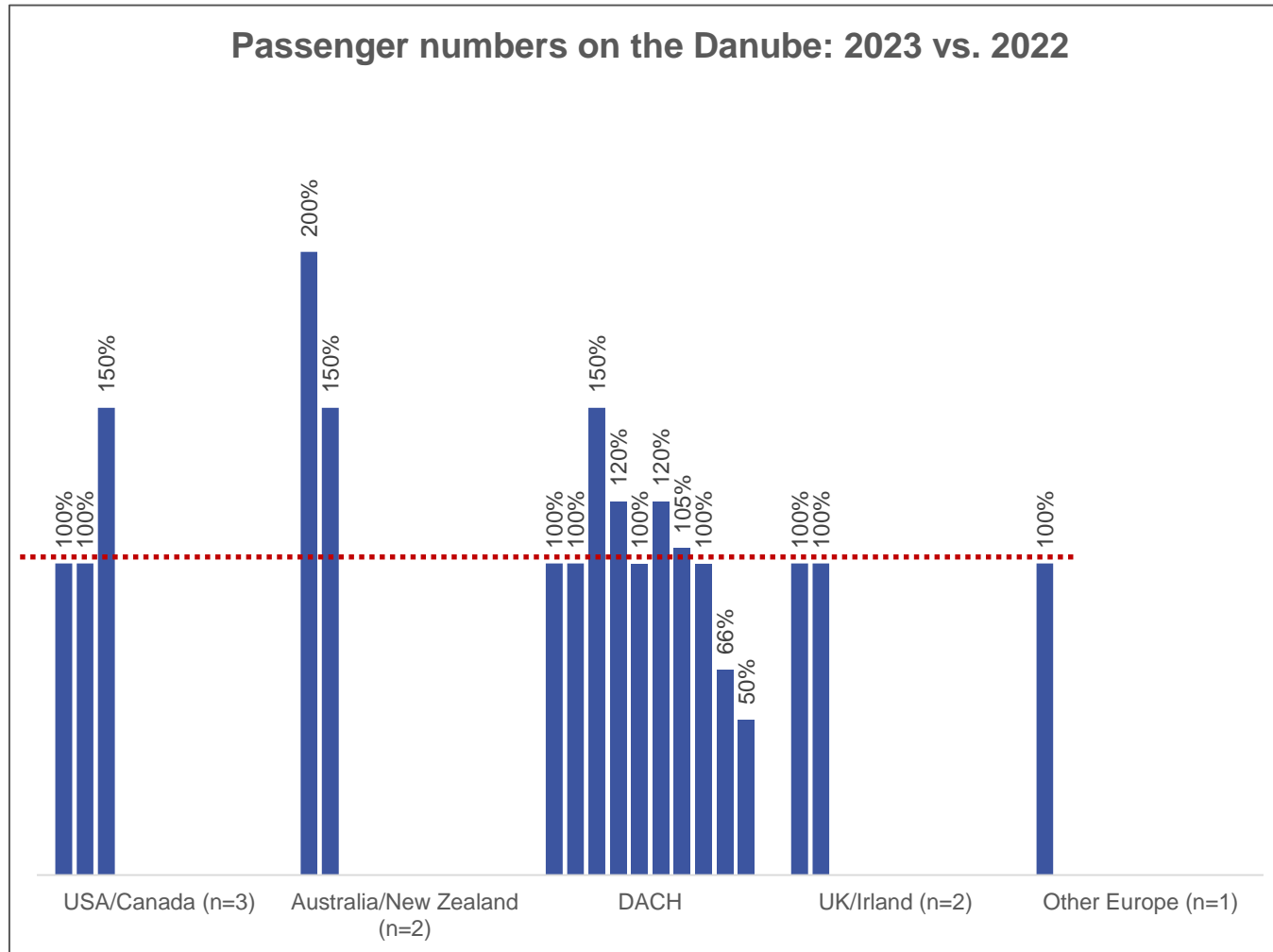


Problem: Very few mentions with % figures

- Of the few stakeholders who answered this question, some unfortunately misunderstood the question.
- Only individual responses from stakeholders who understood the question correctly are shown.
- Only a trend statement is possible.

Development on the Danube

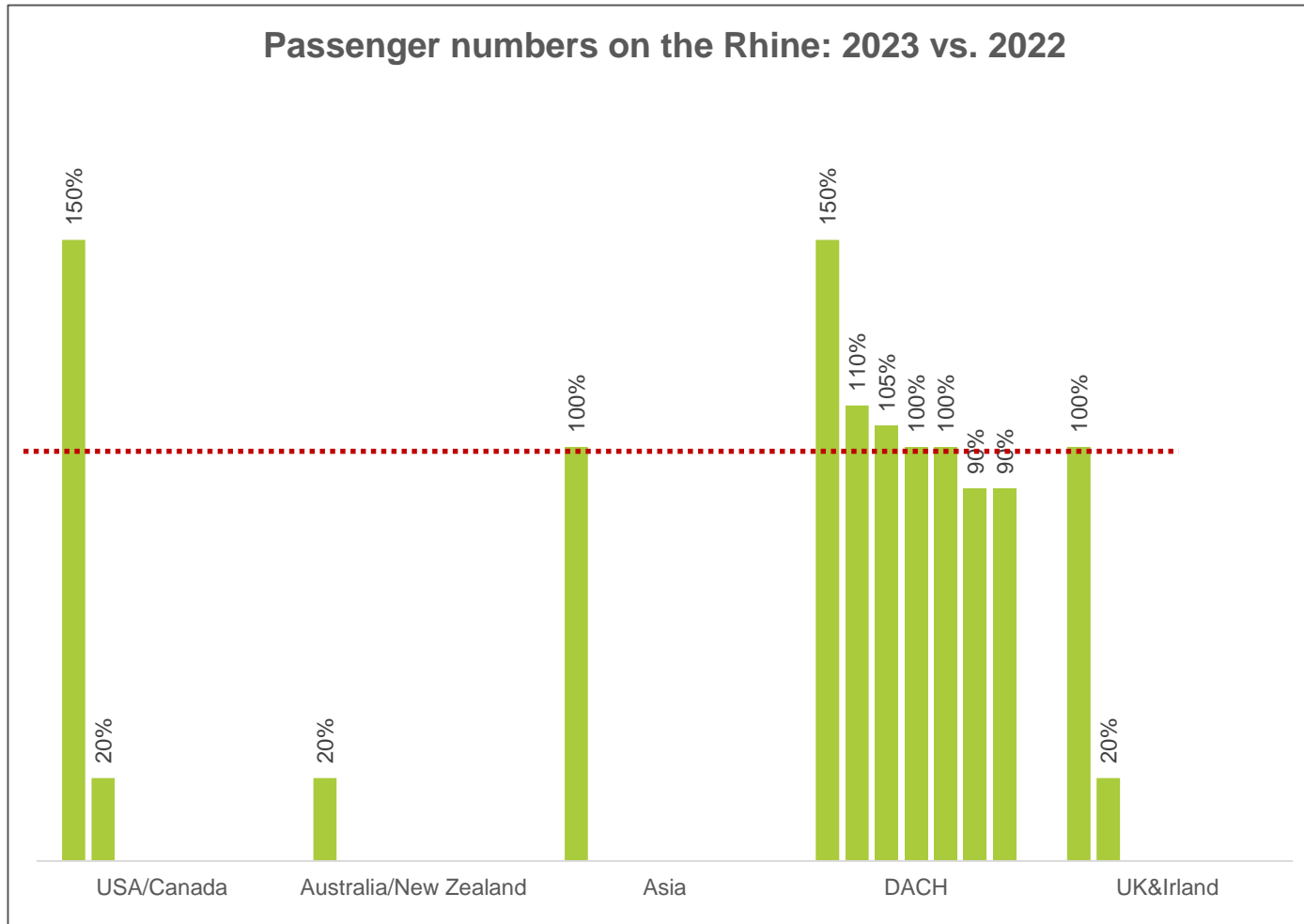
F5_D: How many passengers will be travelling on the Danube in 2023 - compared to the 2022 season? Please answer with regard to your fleet or the fleet for which you provide a service and differentiate between the source markets. | Base: Stakeholders of the river side



- Australia/New Zealand with strong growth
- USA/Canada & DACH markets likewise with growth of up to 150 percent
- UK/Ireland & other Europe at previous year's level

Development on the Rhine

F5_R: How many passengers are travelling on the Rhine 2023 - compared to the 2022 season? Please answer regarding your fleet or the fleet for which you provide a service and differentiate between the source markets. | Base: Stakeholders of the river side.

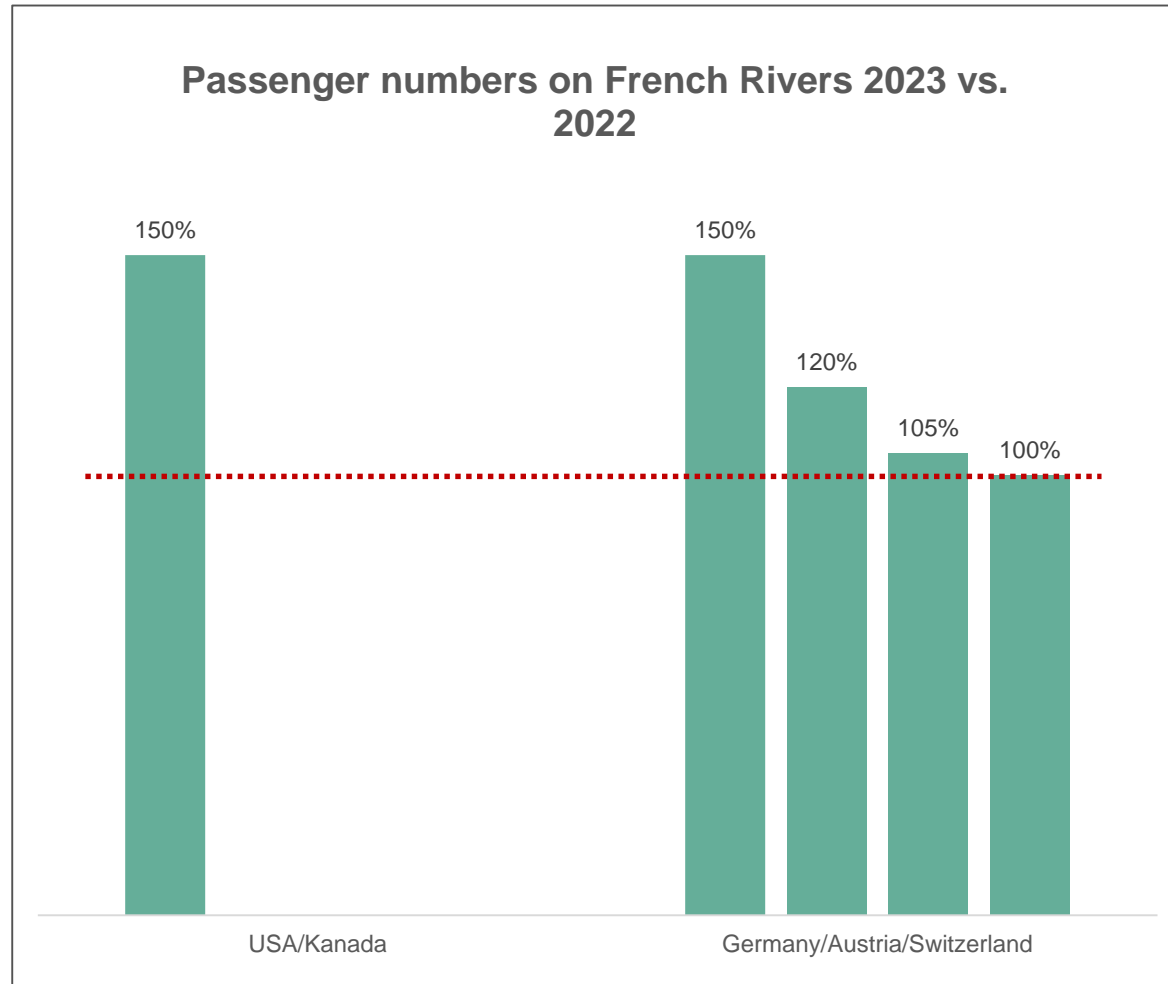


→ USA/Canada and DACH with rising passenger numbers

One provider with the combination

- USA/Canada: 20%
- Australia/New Zealand: 20%
- Asia: 100%
- UK&Ireland: 20%

F5_F: How many passengers are travelling on the French rivers in 2023 - compared to the 2022 season? Please answer regarding your fleet or the fleet for which you provide a service and differentiate between the source markets. | Base: Stakeholders of the river side



Rising passenger numbers on French rivers

→ Source markets USA/Canada & DACH region

Development on the Douro

3 mentions with 100% each, i.e. no change compared to 2022.

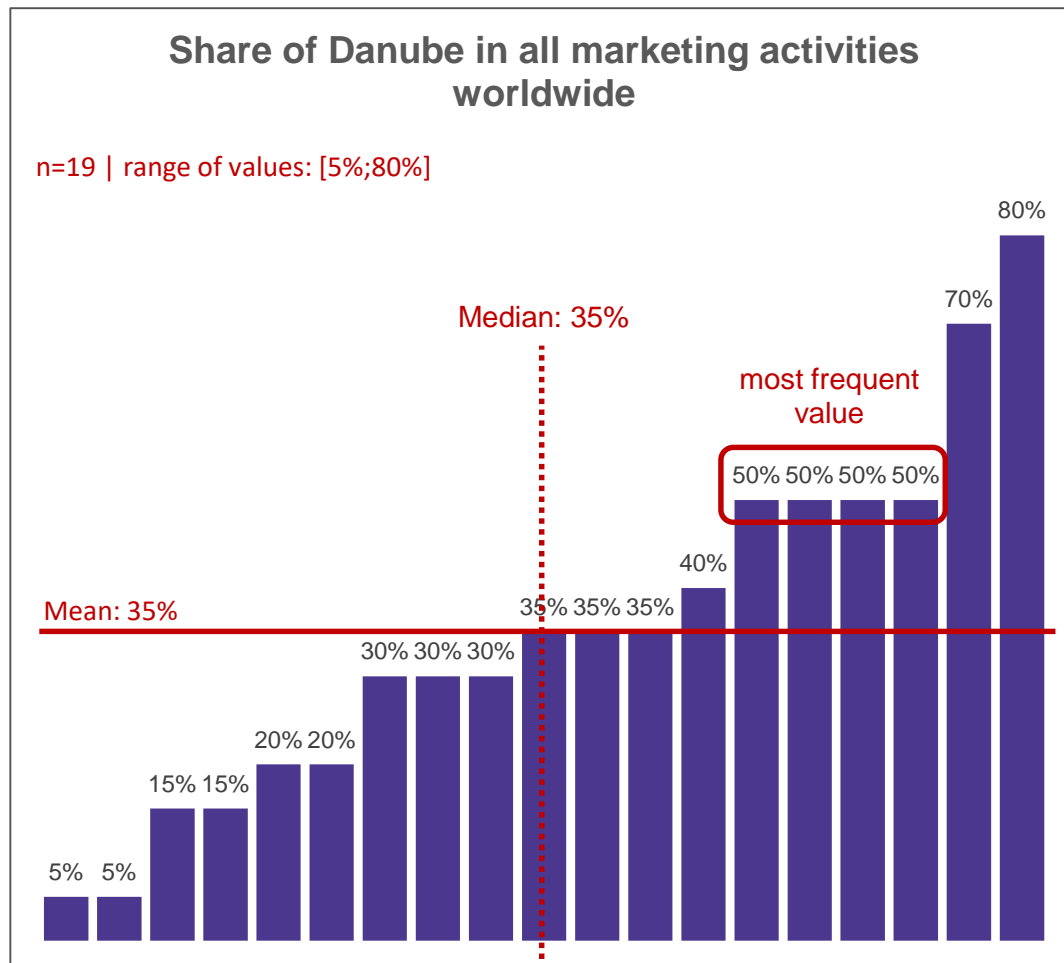
„What percentage of your total marketing activities in all your source markets do you estimate is attributable to the Danube? Please estimate at least roughly.”

Base: Stakeholders of the river side



Danube: Media attention

F15 What percentage of your total marketing activities in all your source areas do you estimate is attributable to the Danube? Please estimate at least roughly
Base: Stakeholders of the river side



- **free, globally effective advertisement** for the Danube with a **comparatively affluent target group** that is **keen to travel**
- Visual presentation of the Danube in the source markets has a **strong impact on the image** → **intensive dialogue on specific destination communication** is recommended

River Side

TOP-3 Challenges



- Staff bottlenecks
- Inflation
- Low water

Significantly more challenging than for the land side:

Ukraine crisis

Land Side

TOP-3 Challenges



- Staff bottlenecks
- Low water
- Hotspot equalisation

Significantly more challenging than for the river side:

Expansion of regional value creation; access to the right contacts; product adjustments with regard to environmental measures to achieve climate protection goals

River side

Most common bottlenecks



- Availability of on-board staff (nautical & service)
- Generally highly frequented moorings

Land side

Most common bottlenecks



- Guides
- Onshore catering

...major differences in perception

for highly frequented moorings

in catering on land

at the locks

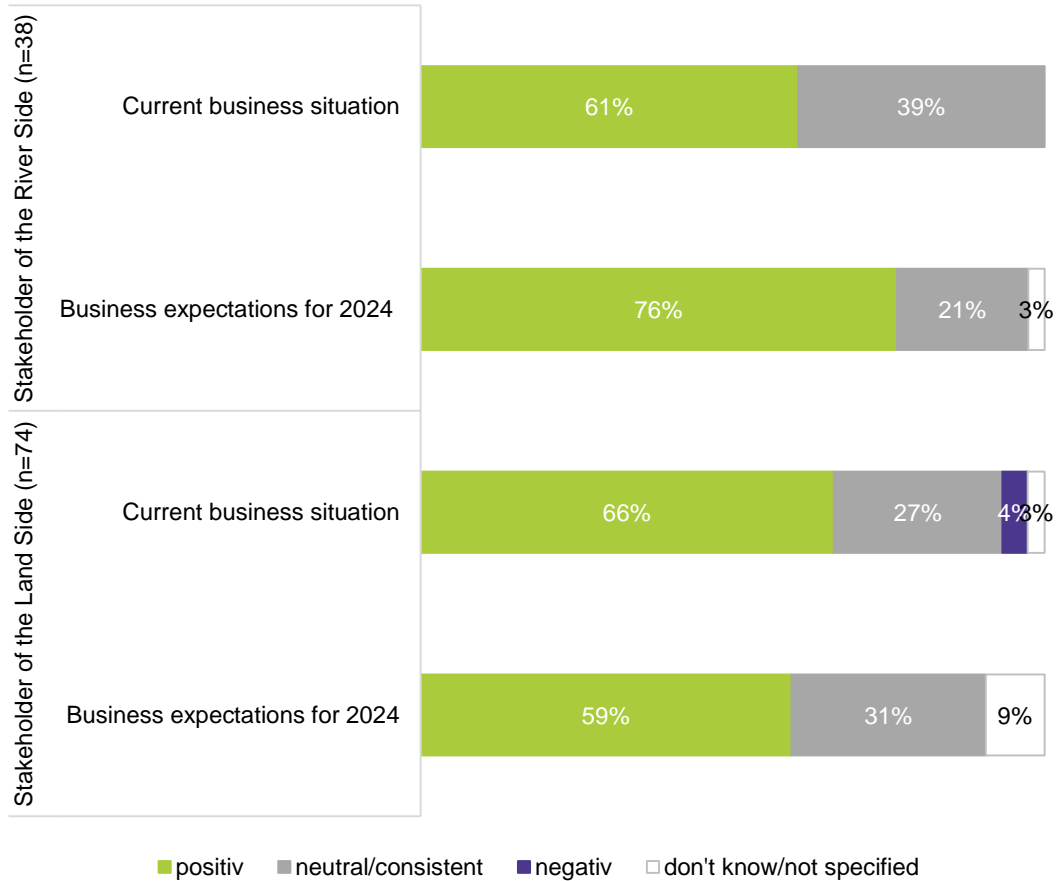
for the supply of shore power

Comparison

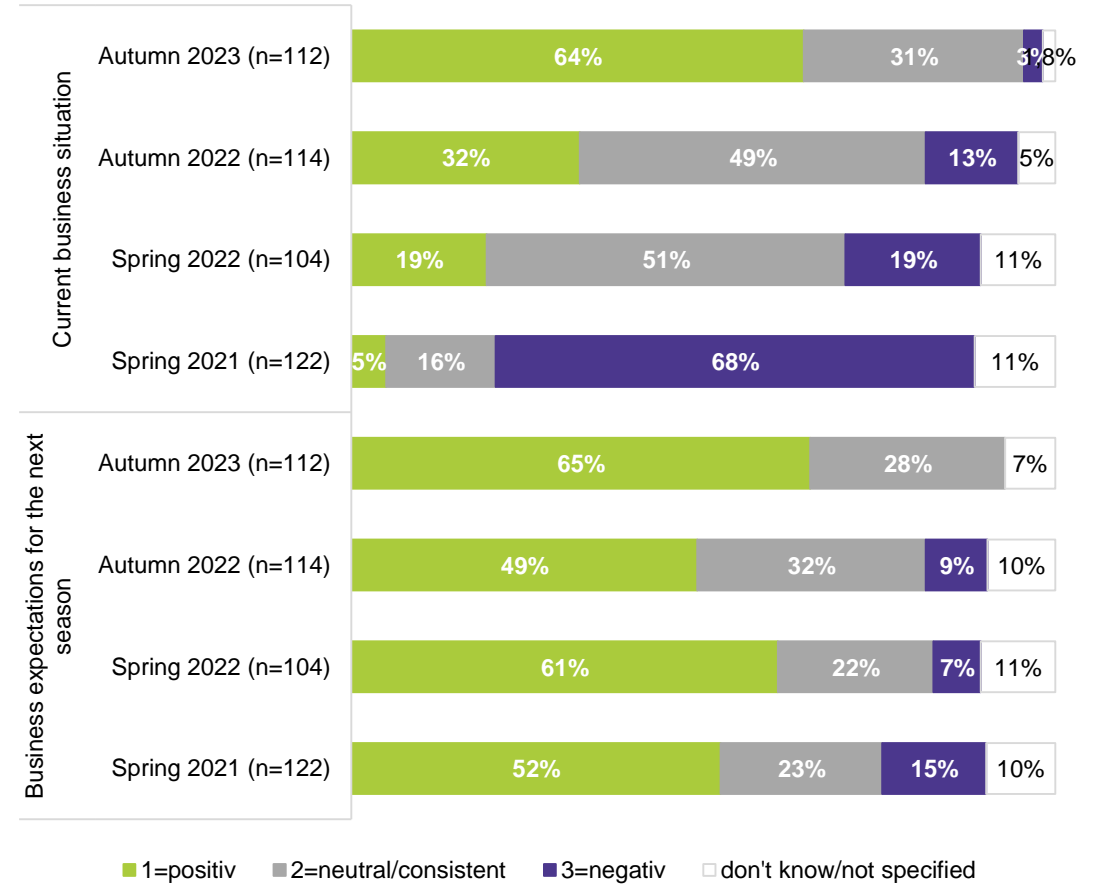
Perception land side	river side		
	Previous activity is to be maintained	Previous activity to be intensified	Out of the question
Layover times too short (→ not enough time for consumption)	48%	37%	15%
Less flexible schedules (→ rush hours)	35%	55%	10%
Regional food is rarely bought locally	46%	38%	17%
Visiting restaurants remains a rare occurrence	22%	43%	35%
Hidden gems are undermarketed	29%	46%	25%
Travel offers are still not very environmentally friendly.	52%	39%	9%
The coexistence of river and land is not promoted enough	22%	44%	33%
Active exchange between land & river does not tend to occur	37%	37%	26%

Business situation and expectations

F9 Generally, how would you rate the following aspects related to your company/organization on a scale from "1=positive," "2=neutral/consistent" to "3=negative"



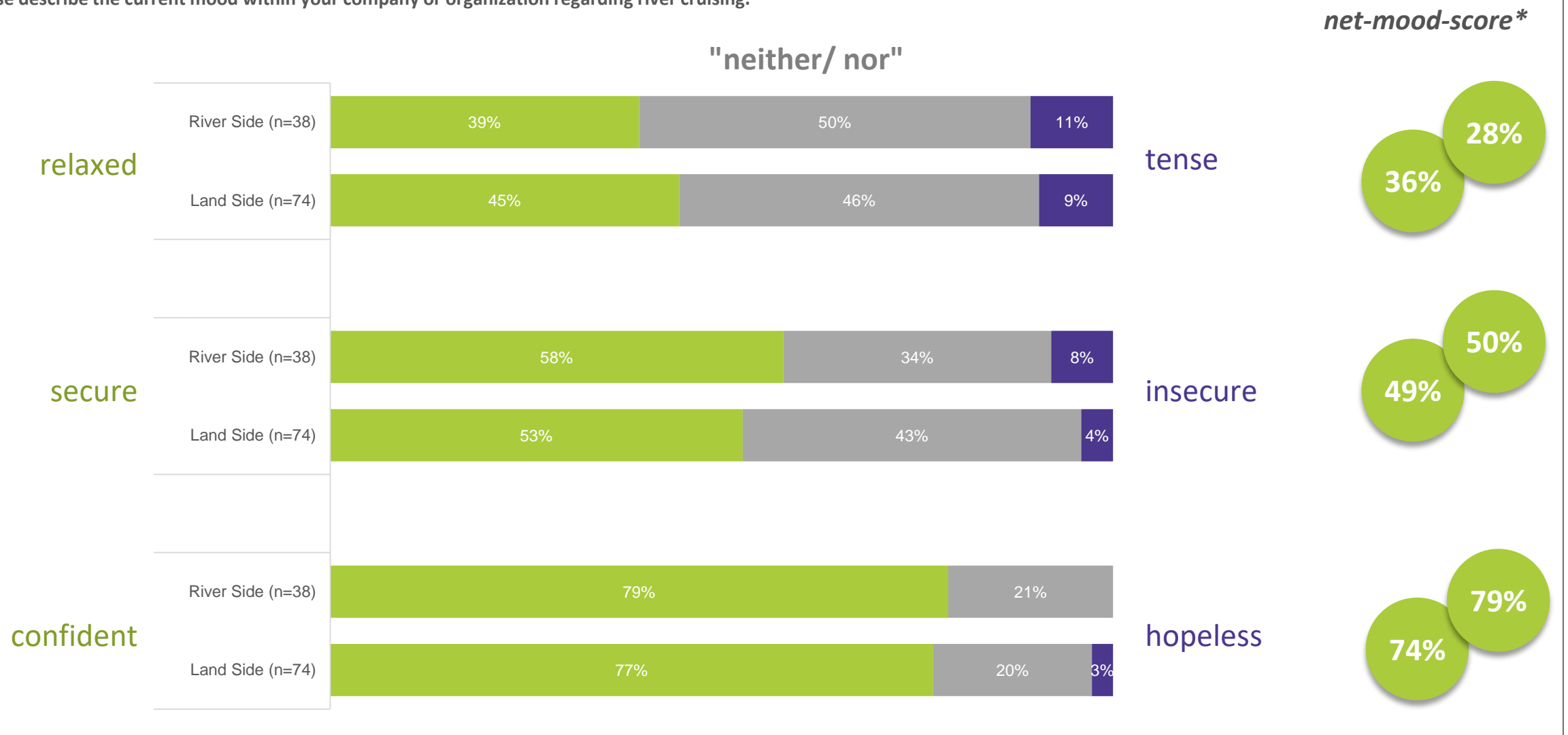
Comparison over time...



Mood in the industry (1)

F12 Please describe the current mood within your company or organization regarding river cruising.

n=114



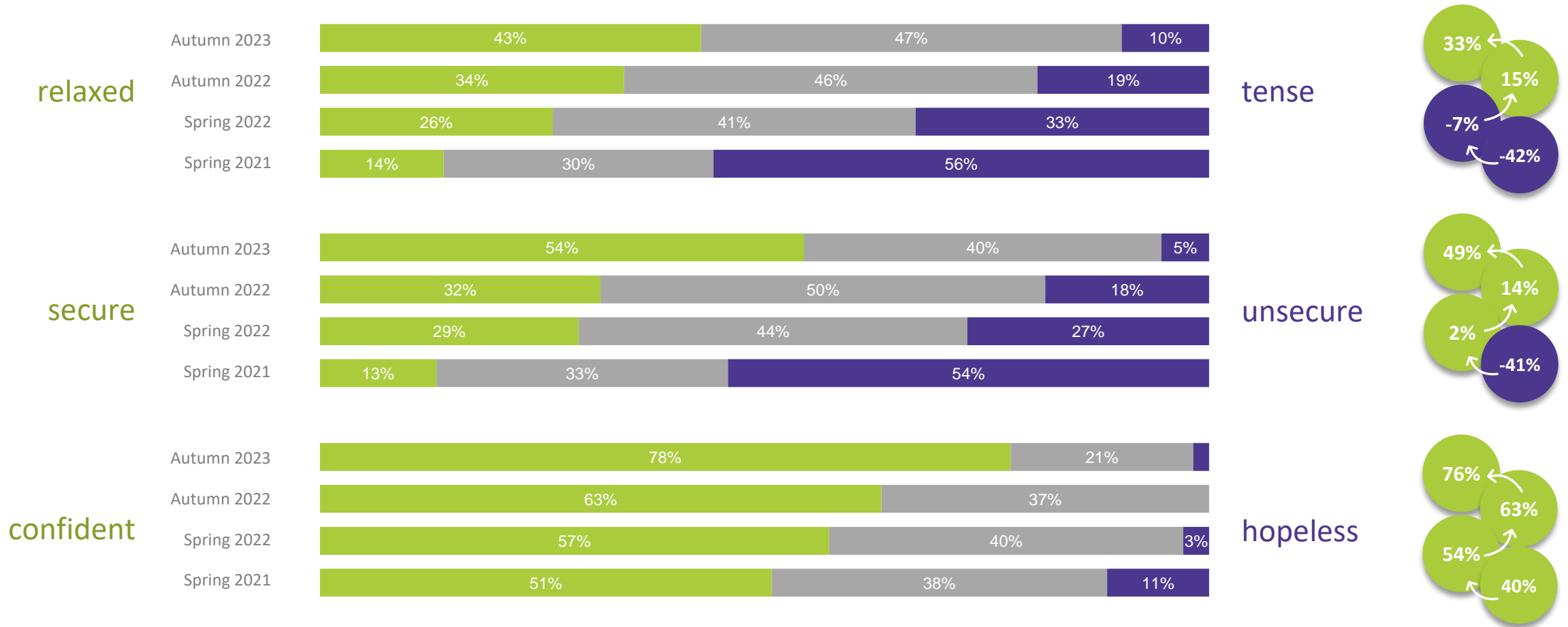
*Proportion "green" - proportion "purple" (→ the bigger, the better)

Mood in the industry (2)

F12 Please describe the current mood within your company or organization regarding river cruising.

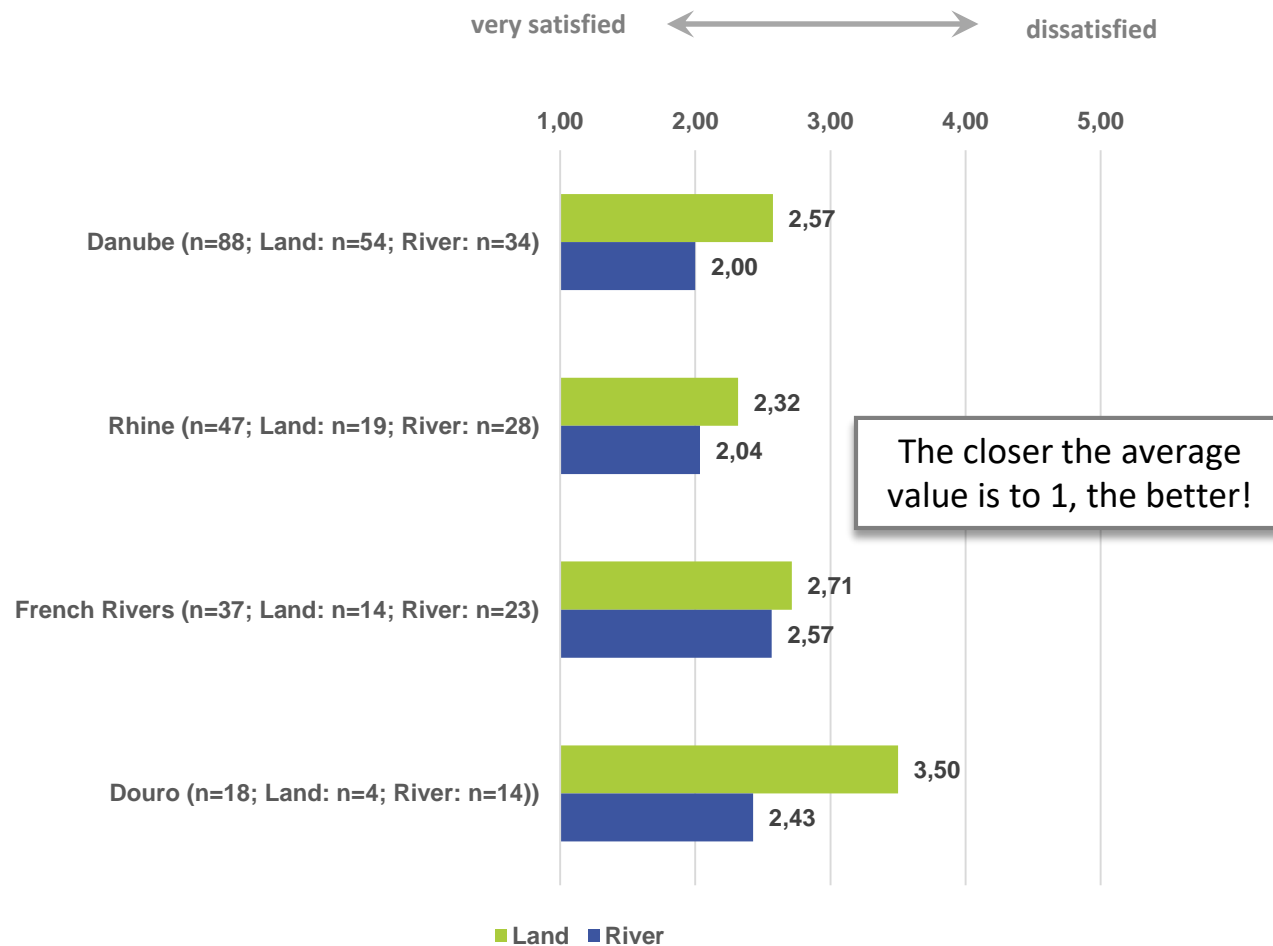
„neither/ nor“

net-mood-score



Stakeholder collaboration

F13 How satisfied are you with the cooperation with partners and stakeholders in the river cruise industry? | Scale: 1=very satisfied, 2=satisfied, 3=partly, 4=rather dissatisfied, 5=dissatisfied



→ The **riverside** exhibits **higher satisfaction** levels in collaboration with partners and stakeholders in the river cruise industry compared to the landside.

→ Overall, **satisfaction along the Danube and Rhine is relatively positive**. However, stakeholders on the rivers in France also express a certain degree of dissatisfaction.

(Note: The number of cases for the Douro is very low. Therefore, the provided mean values should be interpreted with caution).

F14 In your opinion, how could the communication between stakeholders be optimized?

Base: All respondents who were not (very) satisfied with at least one travel area in question 13. | 7 cases – 12 mentions

Coordination

- Co-operation on journey times/departures
- Flexibility
- Concise and targeted information for on-site service providers
- Accessibility



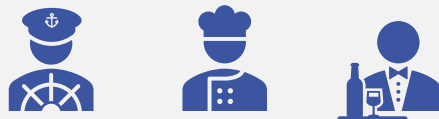
Networking/Events/direct exchange

- Good communication
- Several meetings & events
- Open dialogue and exchange
- Interactions on a peer-to-peer level
- Lobbyists in Brussels



Staff

- More skilled personnel
- Focus: Personnel - Training for crew



Focus: Quality

- Quality instead of price dumping



F14 In your opinion, how could the communication between stakeholders be optimized?

Base: All respondents who were not (very) satisfied with at least one travel area in question 13. | 19 cases and 19 mentions

Operational alignment

- Facilitating direct communication for appointment coordination to prevent overcrowding.
- Optimizations of moorings



Personal Communication



- Conducting discussions at the start and conclusion of the season
- Maintaining regular communication between shipping companies, jetty operators, and municipalities
- Encouraging personal exchanges between shore excursion providers and tour operators

Marketing / Produkts

- Promote onboard attractions well in advance.
- Incorporate excursions into the cruise price for increased realization rates.
- Cultivate greater interest in developing new shore excursions
- Emphasize on-site quality: Avoid cost-cutting on guides and coaches."



Networking

- Cruise clubs on various routes (cf. Rhône-Saône axis)
- More open communication with cruise companies and tour operators
- Network meetings (3x)
- Regular meetings or communication platform, e.g. via River Cruise Europe
- Intensification of available platforms (IG River Cruise, River Cruise Europe)
- Industry newsletter (2x)



Contact Persons

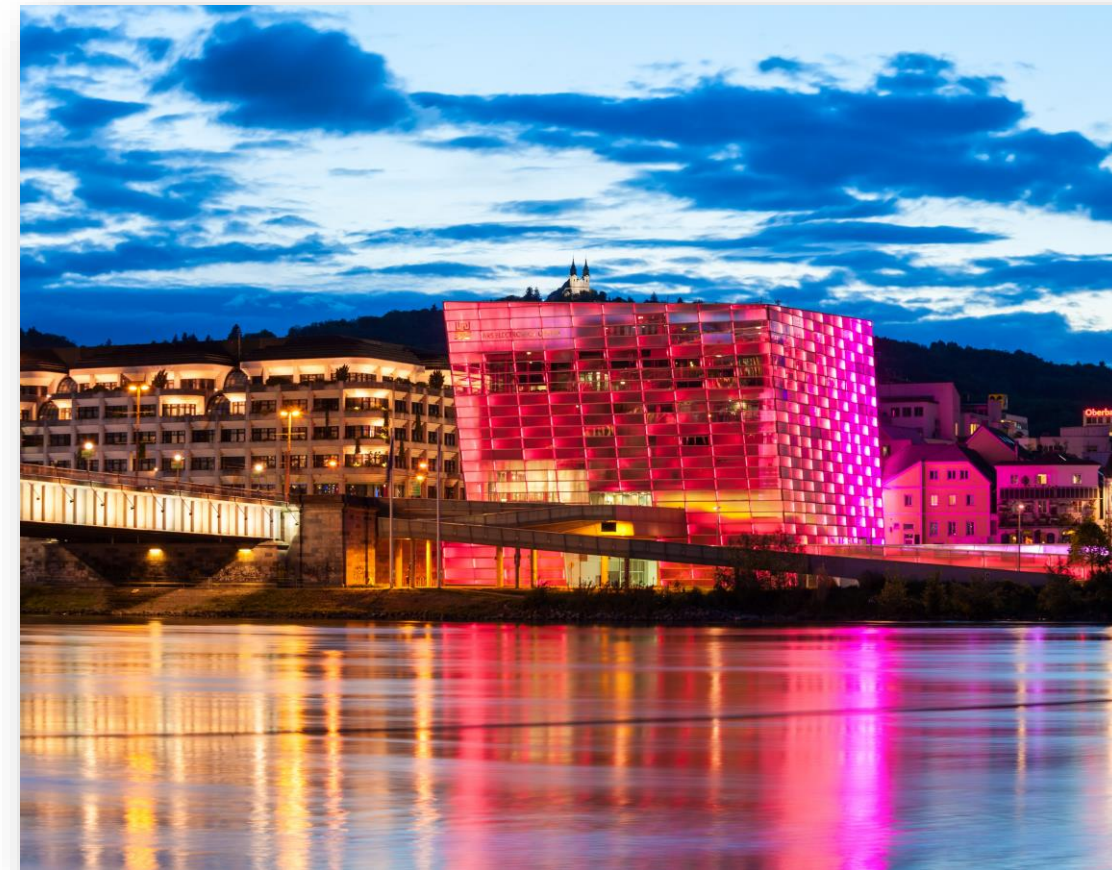
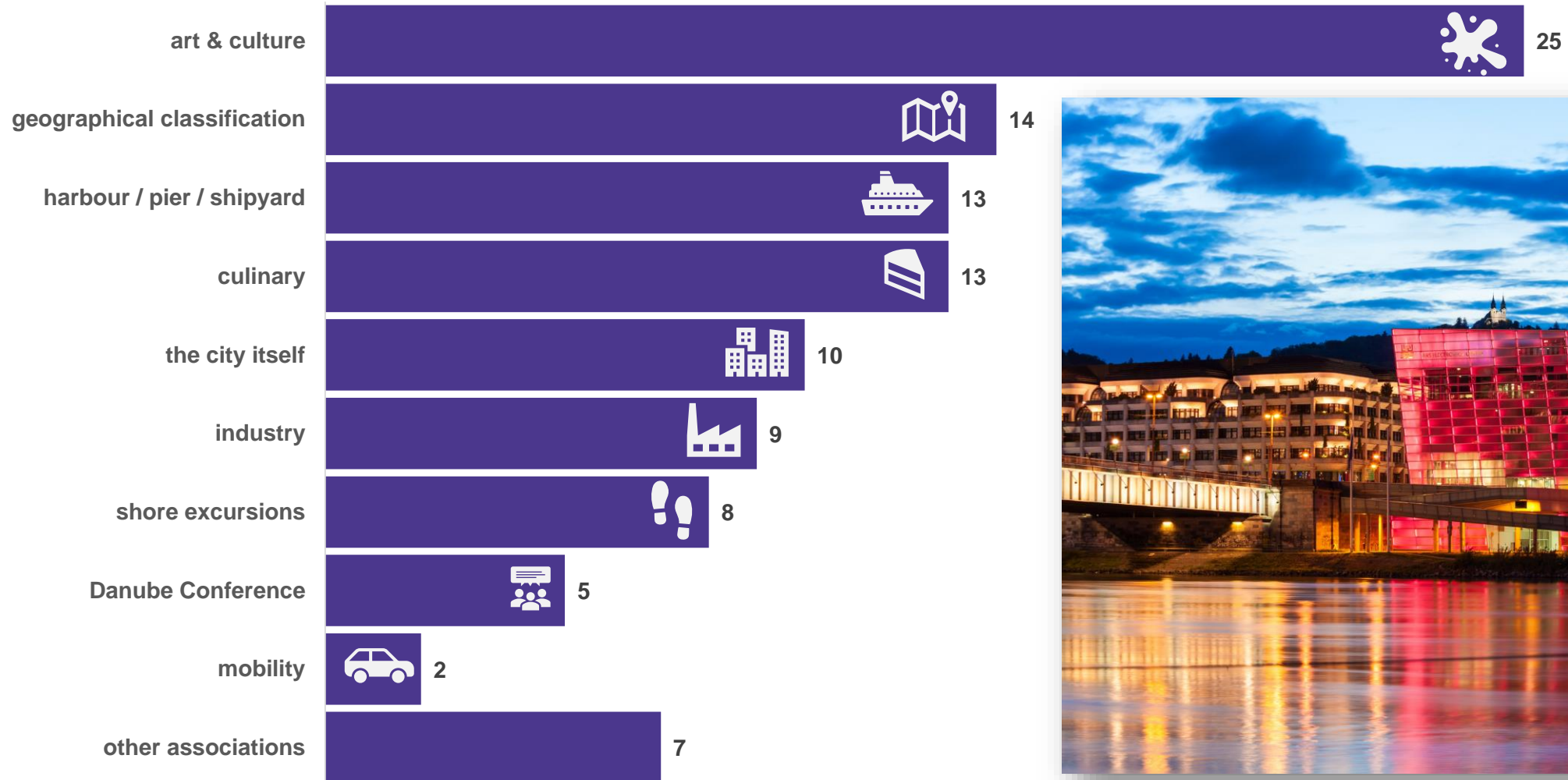
- On-site contact persons of the shipping companies
- Establishing connections with key contacts
- There are no existing contacts
- Notification of the correct contact persons



What do you associate with Linz?

Linz associations

F16 And now, one last question: What do you associate with Linz? | 106 Mentions



Danube harbour

our ships

trendy, modern city

winter harbour

river cruise ships

modern, progressive, future-orientated

dream excursion town

the good WGD partners

many possibilities

"It starts in Linz"

lively, aspiring city

difficult mooring situation in the high season

many possibilities

nice city

pretty city

ÖSWAG

moorings close to the centre

sometimes overcrowded

only know Linz as a mooring for our ships

Danube tourism headquarters

"Linz changes"

flair, much to be seen

Danube Conference

industry

steel

industrial line

Voest Alpine

Danube

Austria

great and creative hosts

fresh

Romans

Lentos

innovation

Austria's third largest city

capital of Upper Austria

modern, cosmopolitan city of steel and art

Bruckner

Dom

Bruckner days

universitty

the first love

networking

good contacts

Ars Electronica

Pöstlingberg

car traffic

underrated, modern city of

culture

culture

music house

music & culture

no Airport

good food

music theatre

no Guides, no busses

great options for excursions

Leberkas Pepi

Linzer Tart

Wine

cakes

City Tour

little to offer - rather departure point to Salzburg

The results are now available at

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

Thank you for your attention!

Would you like to become part of
our industry panel?

→ Simply scan the QR code and
register today!





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