

Image source: Adobe Stock / tichr

River Cruise Industry Survey #7

Autumn 2026

CENTOURIS

Study design 2026

Methodology

- **Online-Survey**
- **Target audience:** stakeholders with a direct or indirect connection to the river cruise industry
- **Focus:** Danube, Rhine, French rivers, Douro, Dutch rivers

Sample

169 complete interviews and **10 partial interviews** with stakeholders who belong to the target group.

Language: German, English, French

Duration

September 2 through October 21, 2026

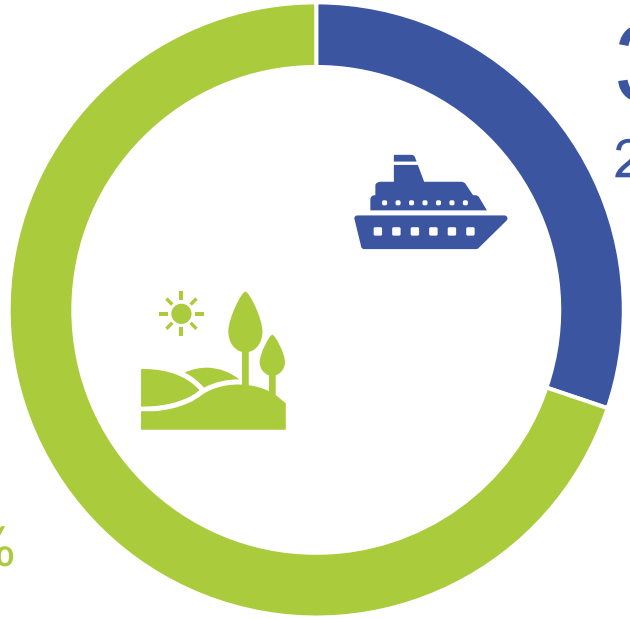
179 responses – significantly more participation than in 2025

Previous year: 149 responses

Participants by Industry

F1 Which industry do you belong to? If more than one industry applies, please select the primary one.

Base: all respondents; n=179, only one answer was possible



River based

30%

2025: 38%

Land based

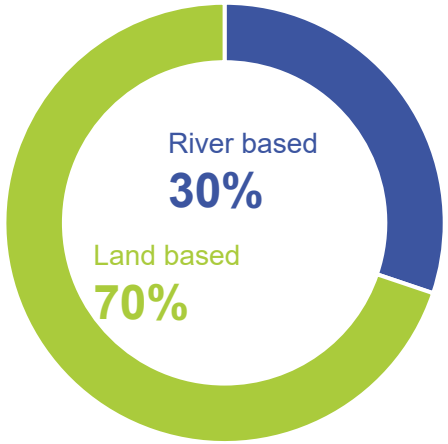
70%

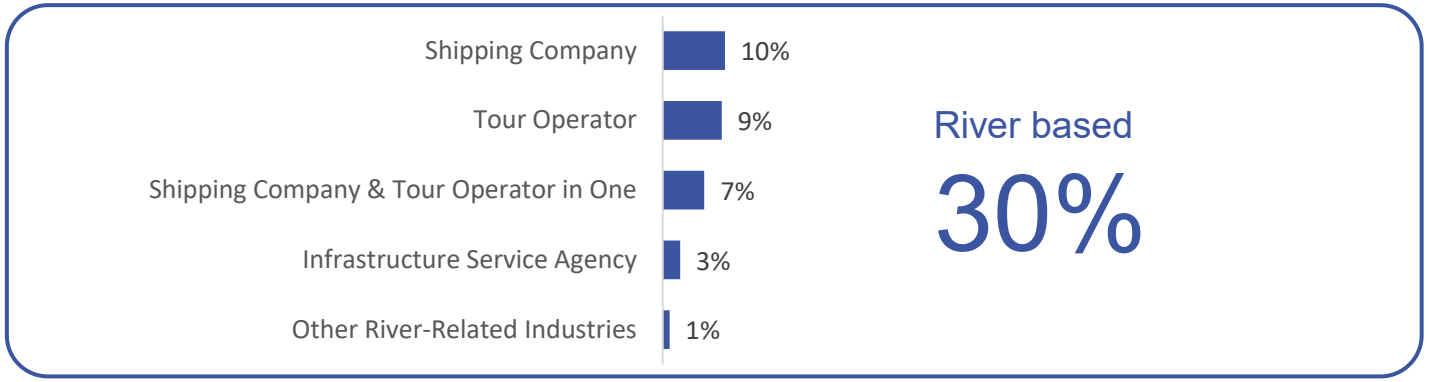
2025: 62%

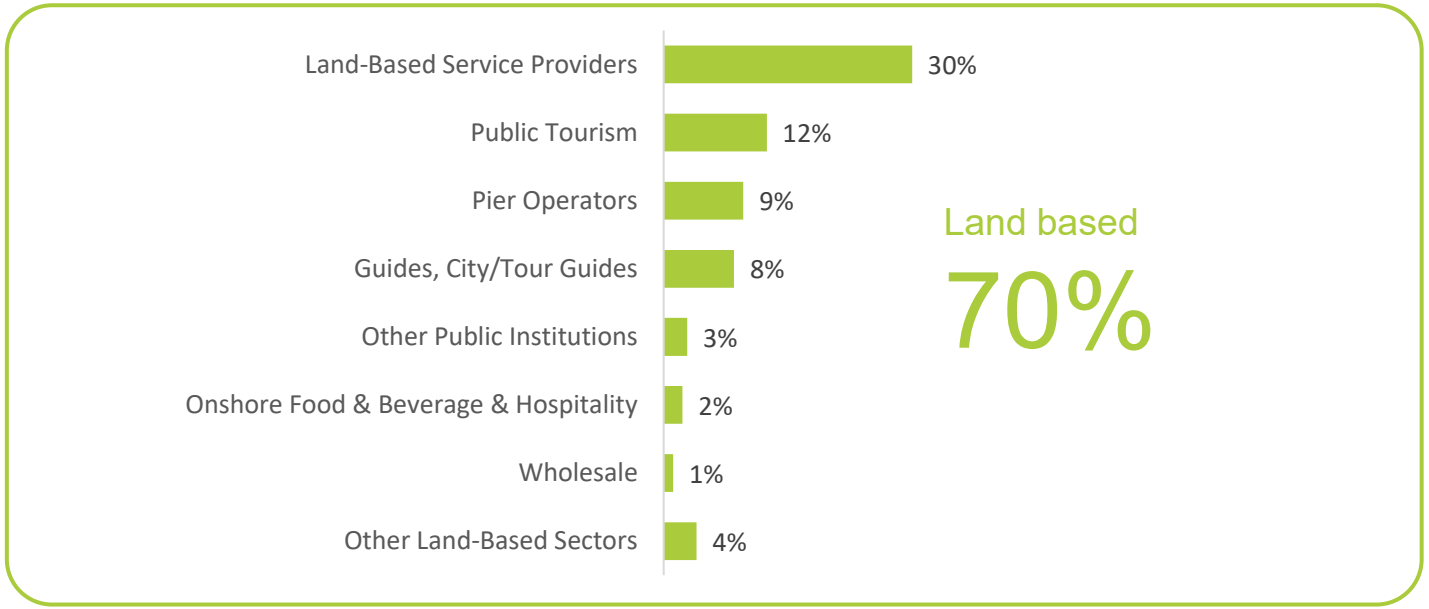
Participants by Industry

F1 Which industry do you belong to? If more than one industry applies, please select the primary one.

Base: all respondents; n=179, only one answer was possible







Who participated in the questionnaire?

F2 Which of the following statements best describes your current role in the organization?
Base: all respondents, n=179

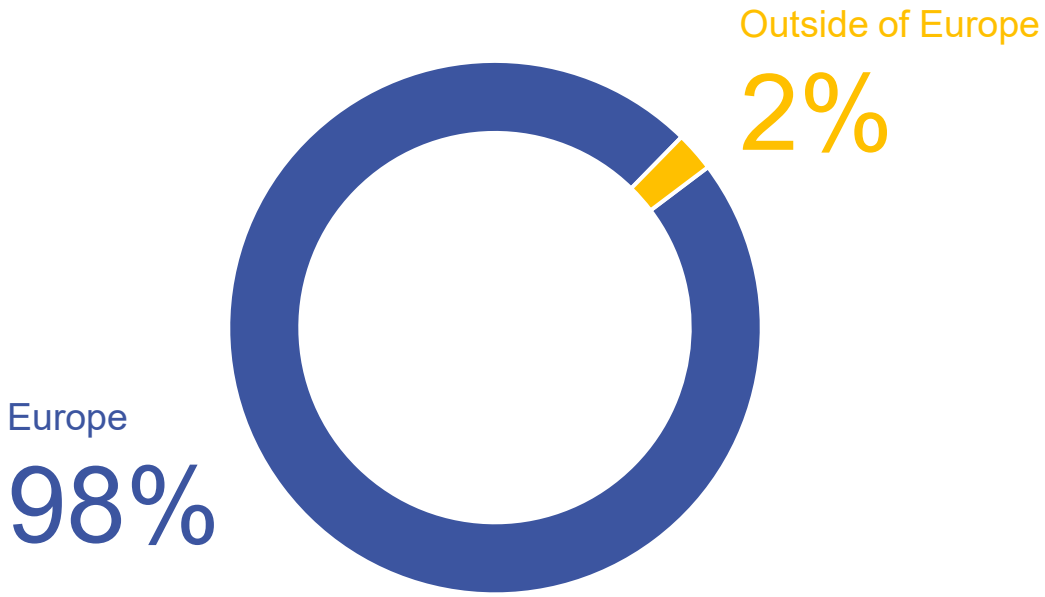


87%

87% of the respondents hold **management positions** or have **technical or project responsibilities**—a solid foundation for well-informed assessments of the industry's development.

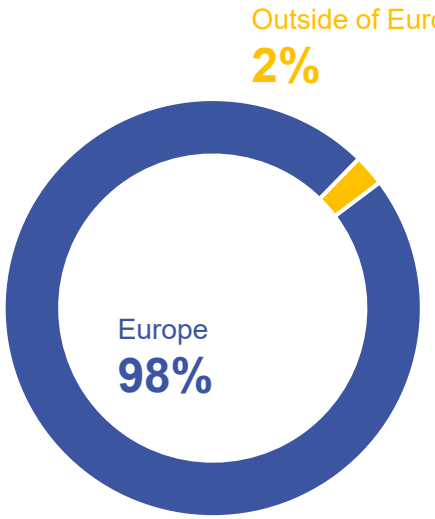
Participants' Location - Company Headquarters

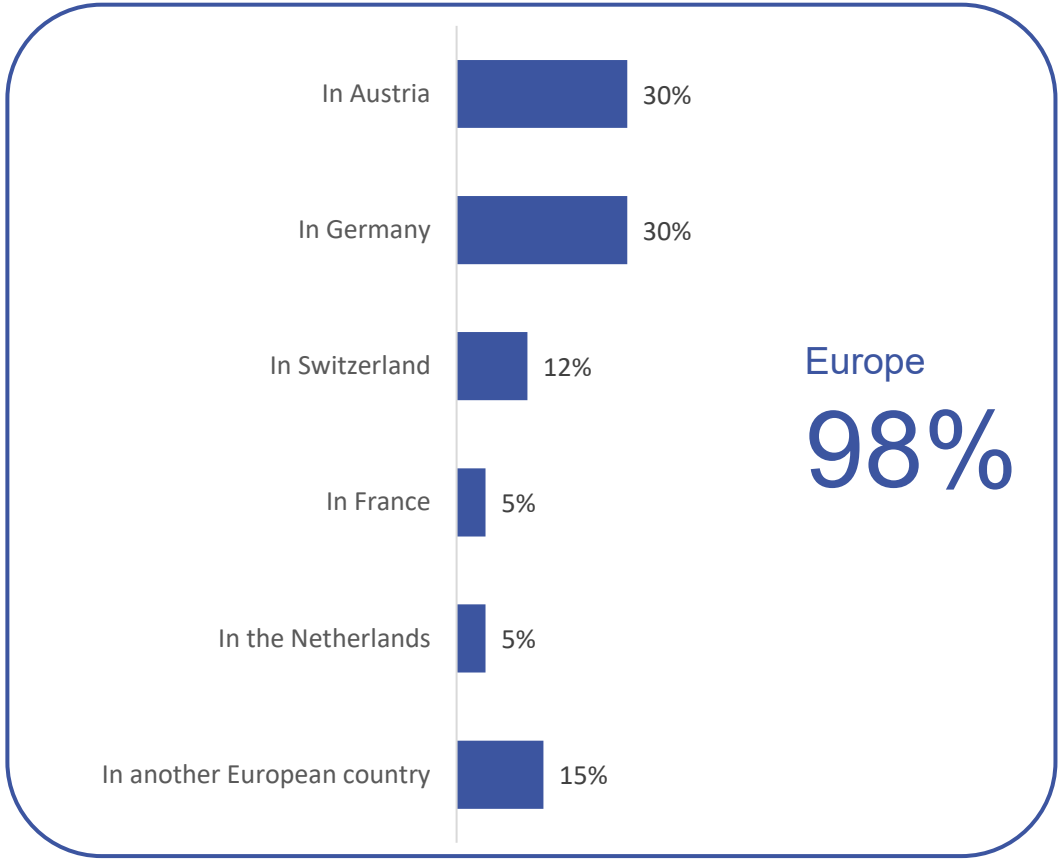
F3 Where is your company's permanent headquarters located?
Base: all respondents; n=177; excluding “no response”



Participants' Location - Company Headquarters

- **F3 Where is your company's permanent headquarters located?**
  Base: all respondents; n=177; excluding “no response”





In 2026, participants were significantly **more likely to come from Austria and Germany**, while the proportions from **Switzerland, France, and the Netherlands declined.**



Source Markets, Travel Areas, and Passenger Forecasts 2027 vs. 2026

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Image source: AdobeStock / mytour

Important Source Markets

F4 Which source markets have a significant impact on your business success? Where do you focus your efforts?
Base: River based stakeholders; n=54; multiple responses were allowed

Outside of Europe



Europe

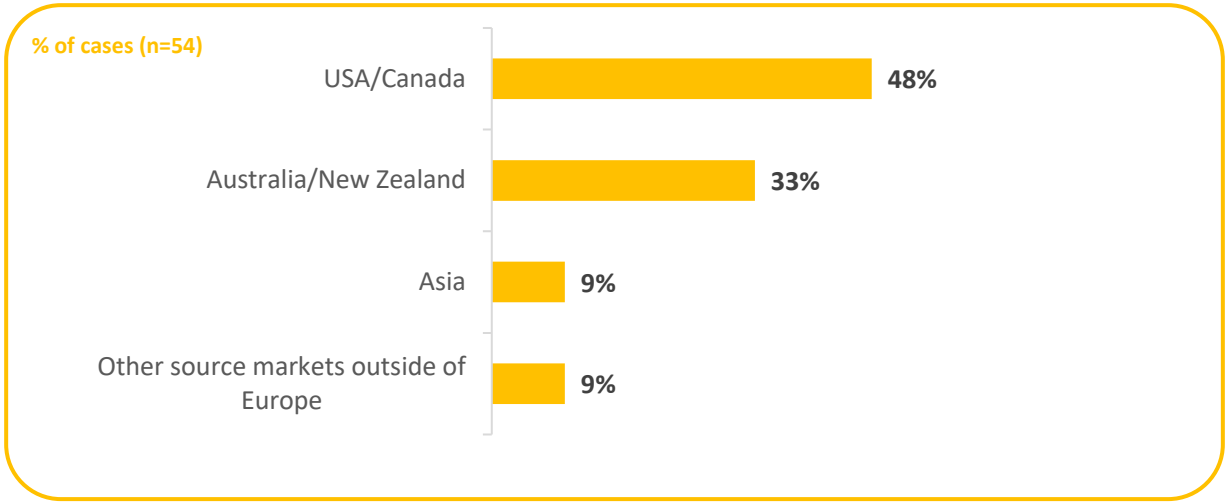


Important Source Markets

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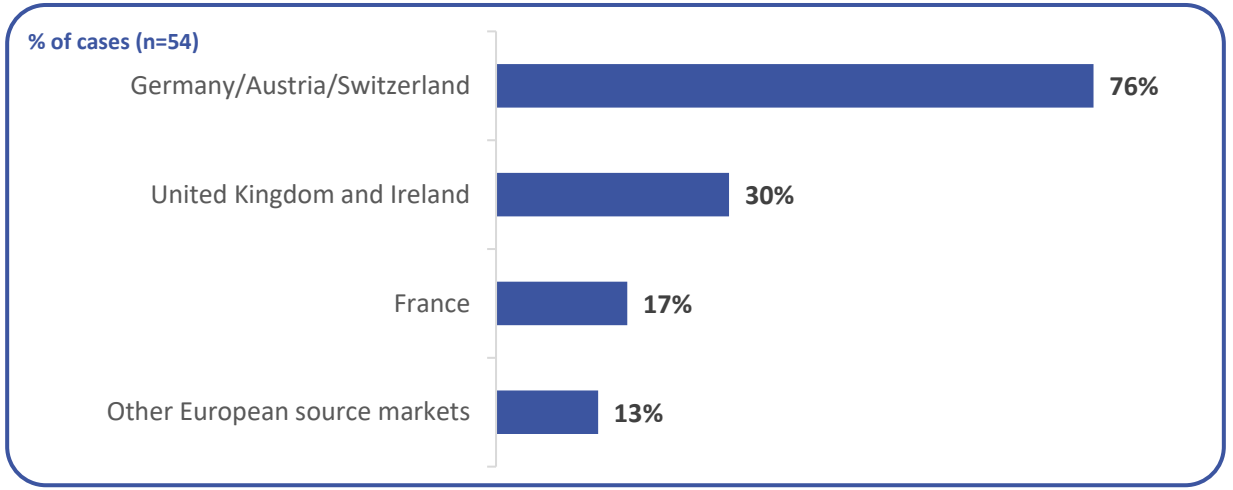
Outside of Europe





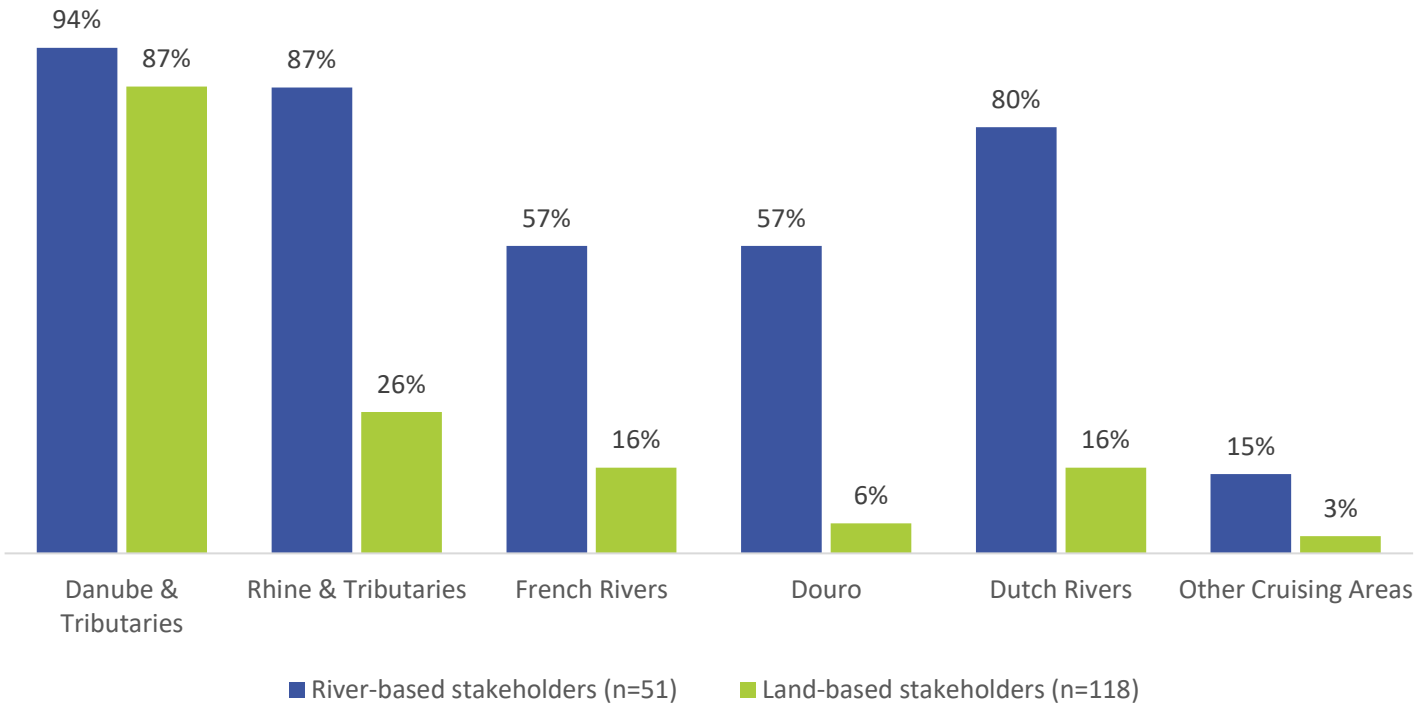
Europe





Relevant Operating Areas

F5 Please select the travel areas or destinations relevant to your company or institution.
Base: all respondents; n=179; multiple responses were allowed

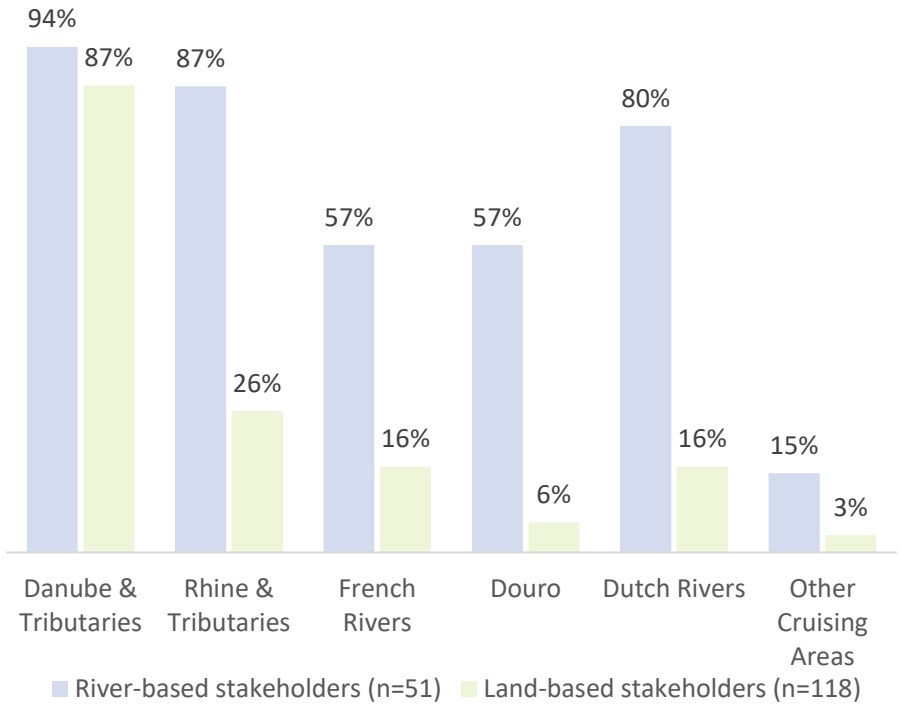


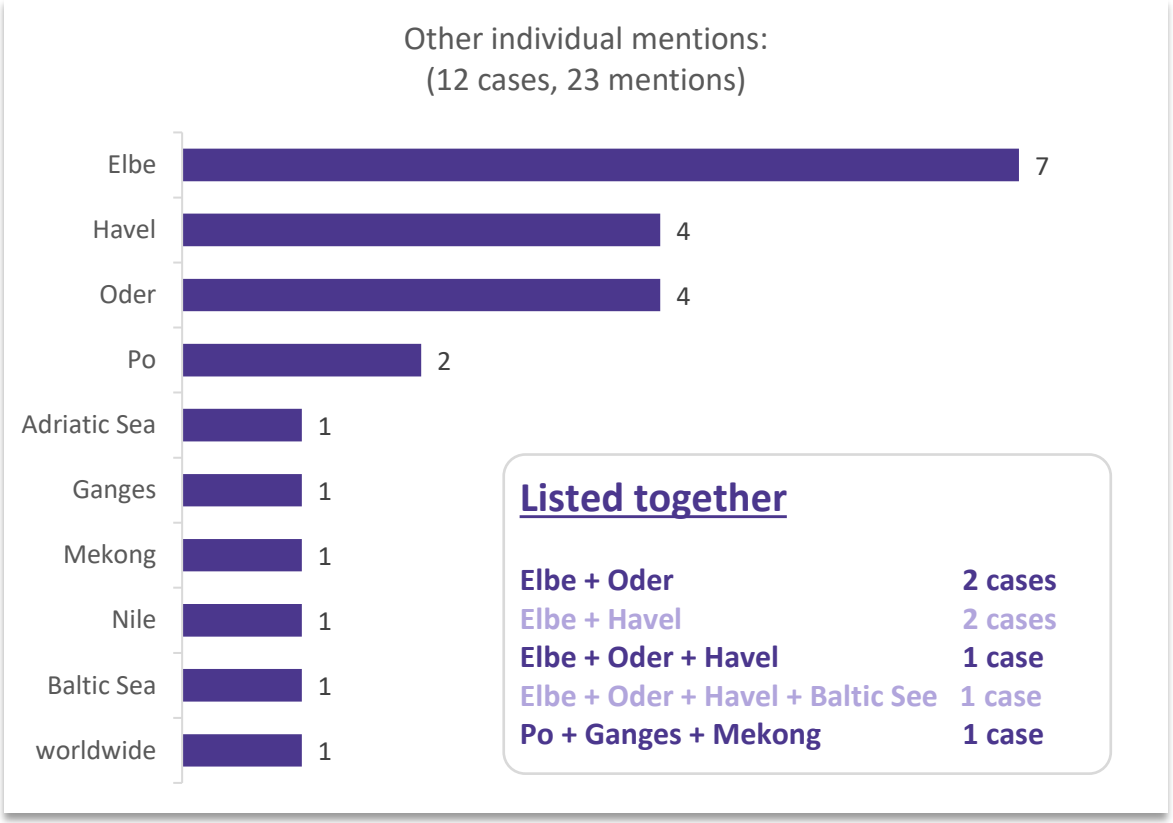
The **Danube** is the common focus of **both stakeholder groups**. While the river-based group has a broad presence across Europe, the **land-based** group focuses much more on individual operating areas.

Note: The high frequency of mentions of the Danube from the land-based group is partly due to the nature of the sample, as stakeholders along the Danube are particularly well represented in this group.

Relevant Operating Areas

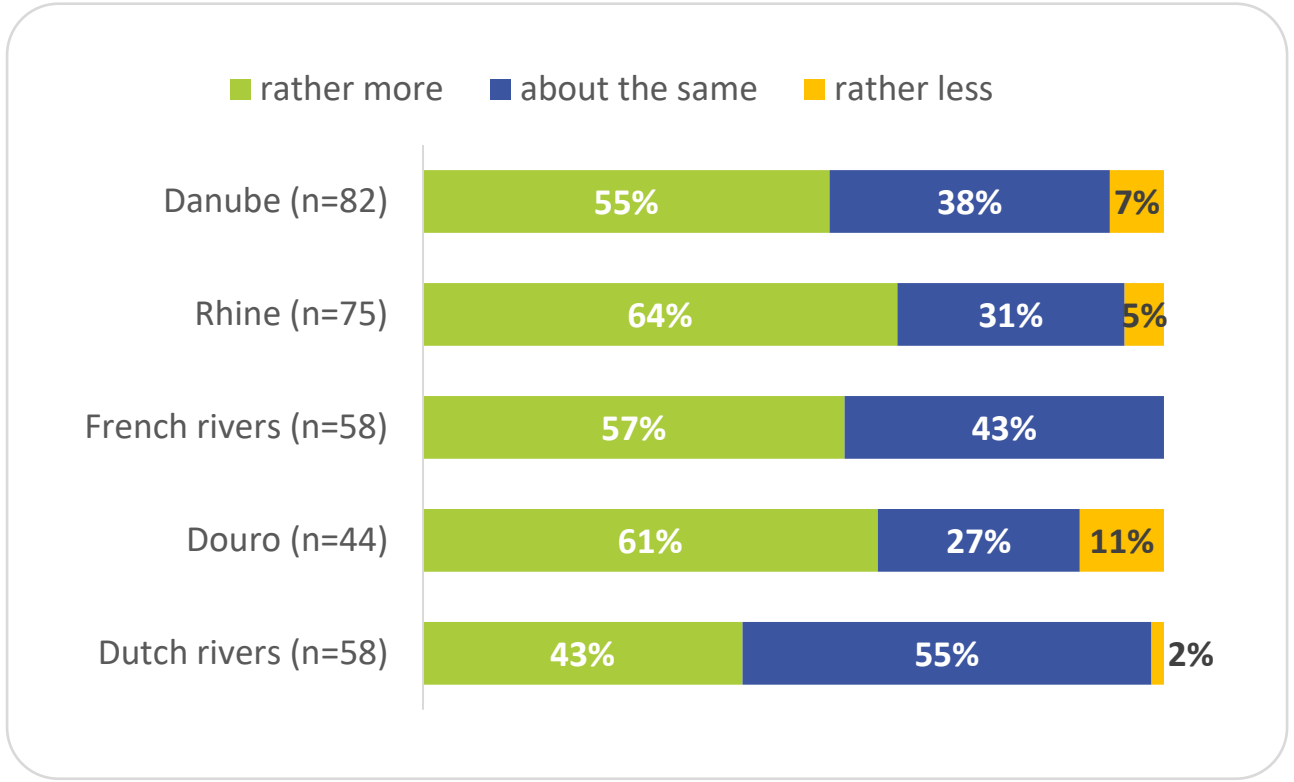
F5 Please select the travel areas or destinations relevant to your company or institution.
Base: all respondents; n=179; multiple responses were allowed





Passenger Volume Trends: 2027 vs. 2026

F8_X: Based on the current booking situation, how do you estimate the trend in passenger numbers for the 2027 season compared to the 2026 season for Danube/Rhine/French rivers/Douro/Dutsch rivers?
Base: Stakeholders on the river side with relevant operating area, excluding "not specified"



Key Findings

- **Positive or stable expectations** prevail across all shipping routes.
- The **Rhine** and **Douro** show the **strongest growth** momentum.
- Stable expectations dominate on Dutch rivers.
- **Expectations** of a **decline** remain **low overall.**

→ Positive outlook for 2027 - especially along the Rhine and Douro; conditions along the Dutch rivers are expected to remain relatively stable.

Growth optimism, especially in North America

Percentage of “rather more” responses by cruise route and source market | Cell content: Percentage and valid basis (stakeholders on the river side with relevant cruise route affiliation)

	USA / Canada	Australia / New Zealand	Asia	Ger/AT/CH	UK / Ireland	France	Other European Markets	Other Source Markets Outside Europe
Danube	72% n=18	47% n=15	50% n=2	50% n=24	54% n=13	33% n=3	25% n=4	100% n=3
Rhine	88% n=16	58% n=12	50% n=2	58% n=24	70% n=10	0% n=2	40% n=5	75% n=4
French Rivers	85% n=13	44% n=9	100% n=2	35% n=17	50% n=8	50% n=2	33% n=3	100% n=4
Douro	90% n=10	43% n=7	100% n=2	40% n=10	43% n=7	100% n=2	0% n=2	100% n=3
Dutch Rivers	58% n=12	44% n=9	100% n=2	30% n=20	50% n=8	0% n=2	0% n=2	67% n=3

Colour Scale

0% 100%

Note: Interpret the small sample sizes – particularly for Asia, France, and other source markets – with caution.

Growth expectations vary significantly by source market

Percentage of “rather more” responses by cruise route and source market | Cell content: Percentage and valid basis (stakeholders on the river side with relevant cruise route affiliation)

	USA / Canada	Ger/AT/CH
Danube	72% n=18	50% n=24
Rhine	88% n=16	58% n=24
French Rivers	85% n=13	35% n=17
Douro	90% n=10	40% n=10
Dutch Rivers	58% n=12	30% n=20

- North America: Particularly optimistic growth forecasts for the Rhine, the Douro, and French rivers.
- Ger/AT/CH: Significantly more cautious forecasts - especially for French and Dutch rivers, as well as the Douro.



Business Conditions & Industry Sentiment

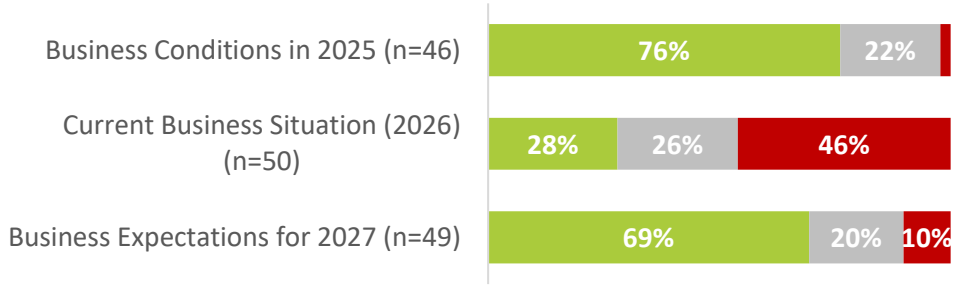
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Image source: AdobeStock / bluedesign

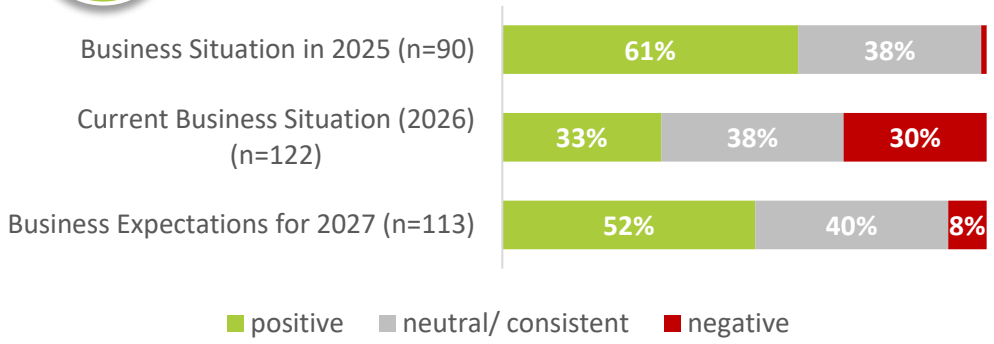
Business Conditions in 2026 and Outlook for 2027

F6 Please rate the following aspects related to your company/institution on a 3-point scale.
Base: all respondents; figures in %, excluding "don't know" and "no response"

River-based stakeholders



Land-based stakeholders

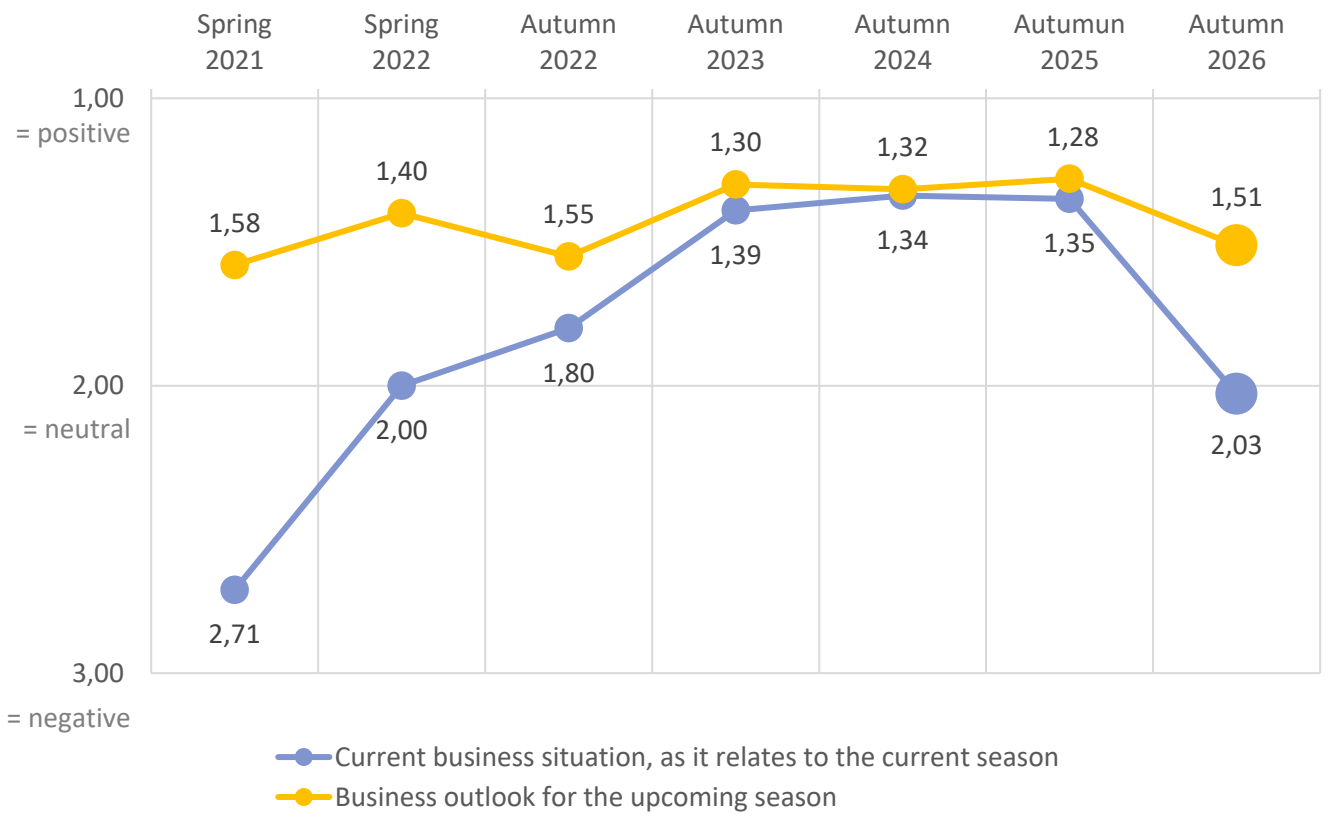


Key Findings

- The **current business situation** is viewed as **significantly more critical** than the general business situation in 2025.
- The **river sector** views the current situation as **significantly more negative** than the inland sector (46% vs. 30% negative).
- **Optimism** prevails again for **2027 -** especially in the river sector.

Business Performance Over Time

Time Comparison – Average Scores | Scale: 1 = positive, 2 = neutral, 3 = negative



Key Findings

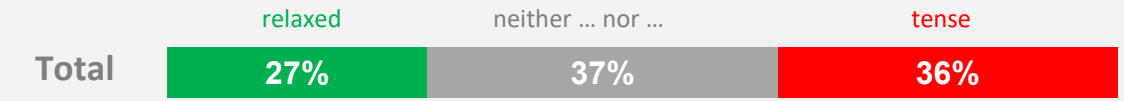
- In 2026, the current business climate will deteriorate **significantly** to 2.03.
- At 1.51, expectations remain clearly **more positive** than the current assessment of the situation.
- After the very positive levels seen from 2023 to 2025, the **gap is widening significantly** again.

Interpretation: Lower values indicate more positive assessments

Industry Sentiment in 2026

F7 Please describe the current sentiment within your company or institution regarding river cruises. | Base: all respondents; n=179

relaxed ↔ tense



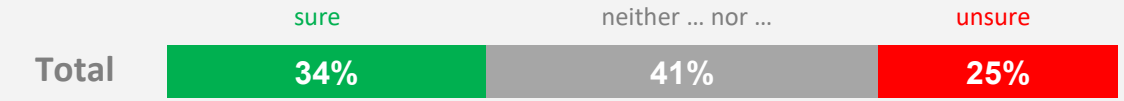
Net-Mood-Score total:

- 8

Net-Mood-Score by group:

River-based:	-24
Land-based:	-2

sure ↔ unsure



Net-Mood-Score total:

+8

Net-Mood-Score by group:

River-based:	+13
Land-based:	+6

confident ↔ hopeless



Net-Mood-Score total:

+52

Net-Mood-Score group:

River-based:	+52
Land-based:	+52

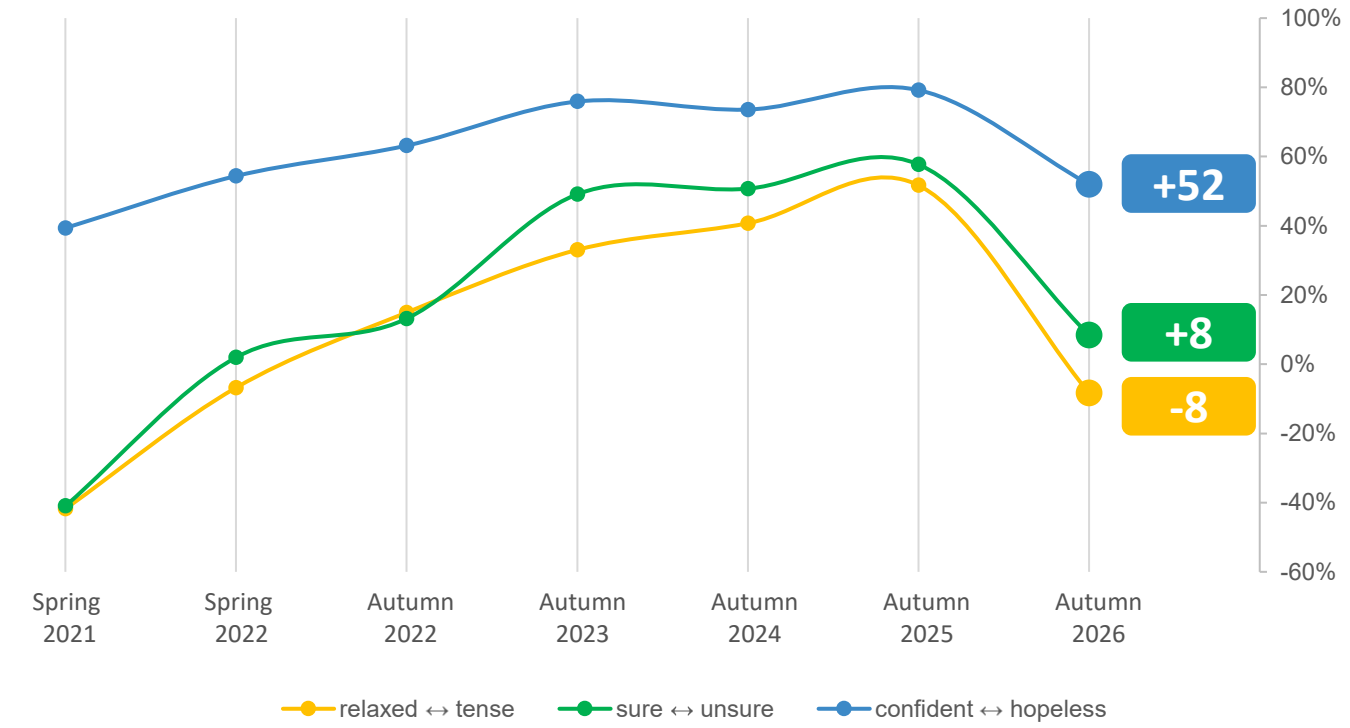
Key Findings

- Overall, the mood is **somewhat tense**, but **not uncertain**.
- The **river side** is **significantly more tense** than the land side.
- Confidence is the **strongest**: clearly positive in both groups.

Net Mood Score = Percentage of positive responses minus percentage of negative responses (the higher, the better).

Industry Sentiment Over Time

F7 Please describe the current sentiment within your company or institution regarding river cruises.
Values: Net Mood Score = percentage of positive responses minus percentage of negative responses (the higher, the better)



Key Findings

- **Tension** will rise again in 2026
- **Certainty** remains slightly positive
- **Confidence** remains clearly the strongest

Interpretation: positive values = positive sentiment balance; negative values = negative sentiment balance



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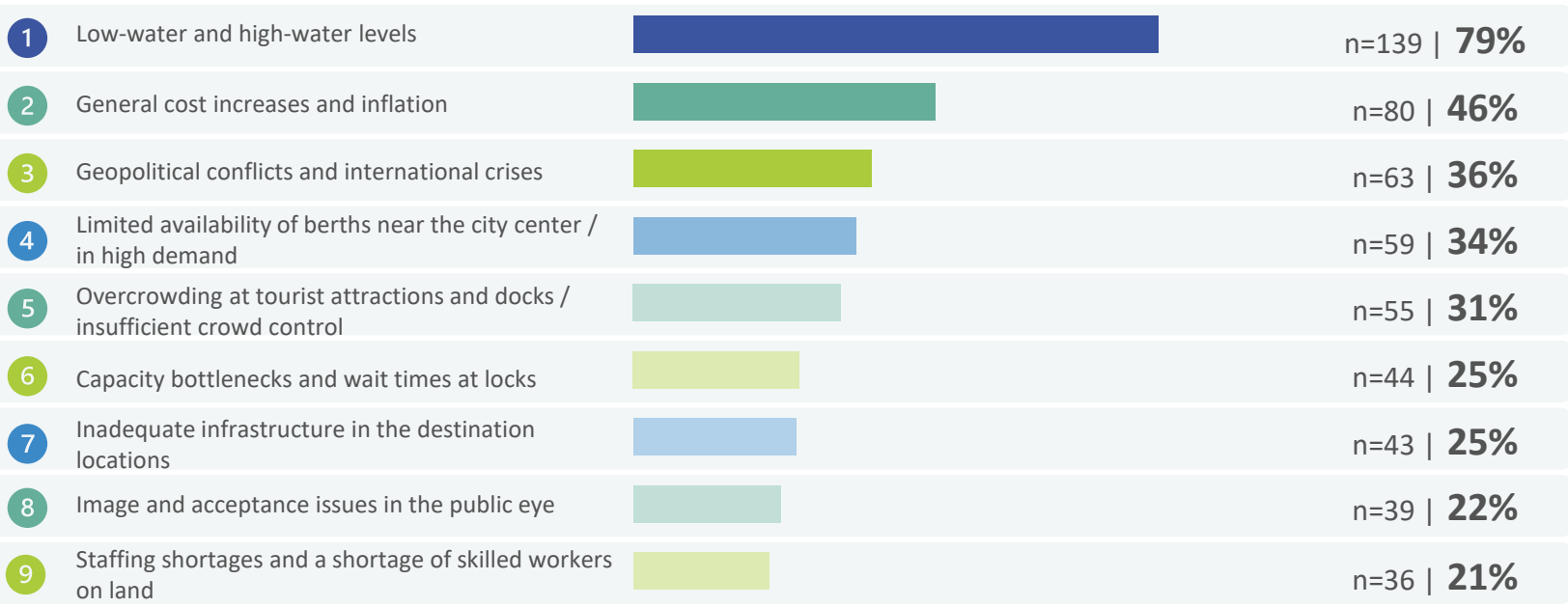
Challenges & Measures for Better Coexistence

Image source: AdobeStock / kieferpix

Biggest Challenges in 2026

F9 In your opinion, which of the following issues currently represent the greatest challenges for the river cruise industry? Please select up to five challenges.
Base: all respondents, excluding "no response"

744 mentions | **175** respondents | **max. 5** possible mentions



Further important topics

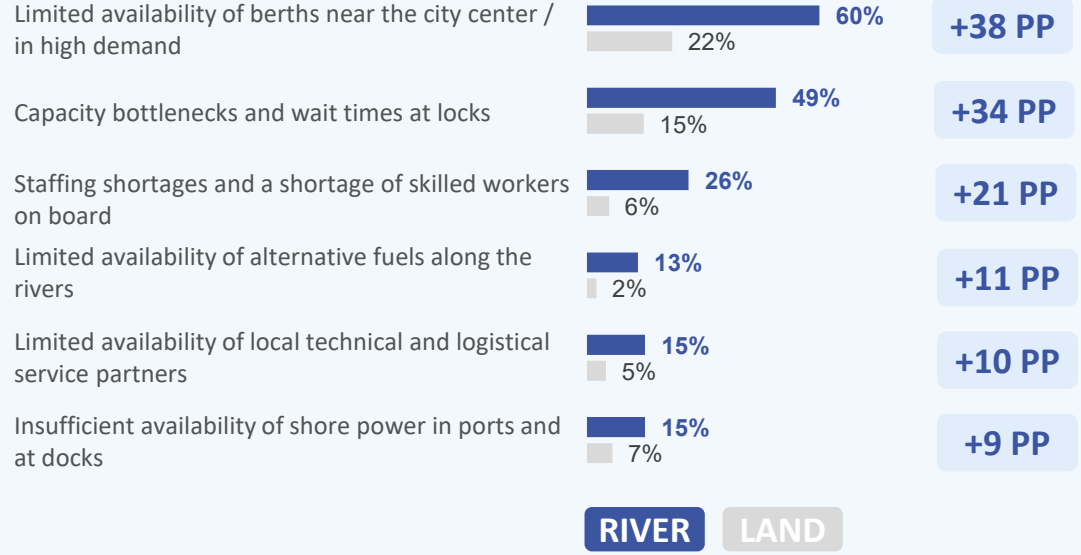
- Difficulty reaching river based contacts
- Expanding regional value creation in destinations
- Staffing shortages and shortage of skilled workers on board
- Financing sustainable investments

Key Message
The biggest challenges in 2026 will clearly be water levels, costs, and geopolitical uncertainties; added to these are infrastructure and capacity bottlenecks along the travel chain.

Common Challenges – Different Priorities

Mentioned significantly more often on the river side (n=53)

Selected challenges with the greatest differences compared to the land side



Mentioned significantly more often on the land side (n=122)

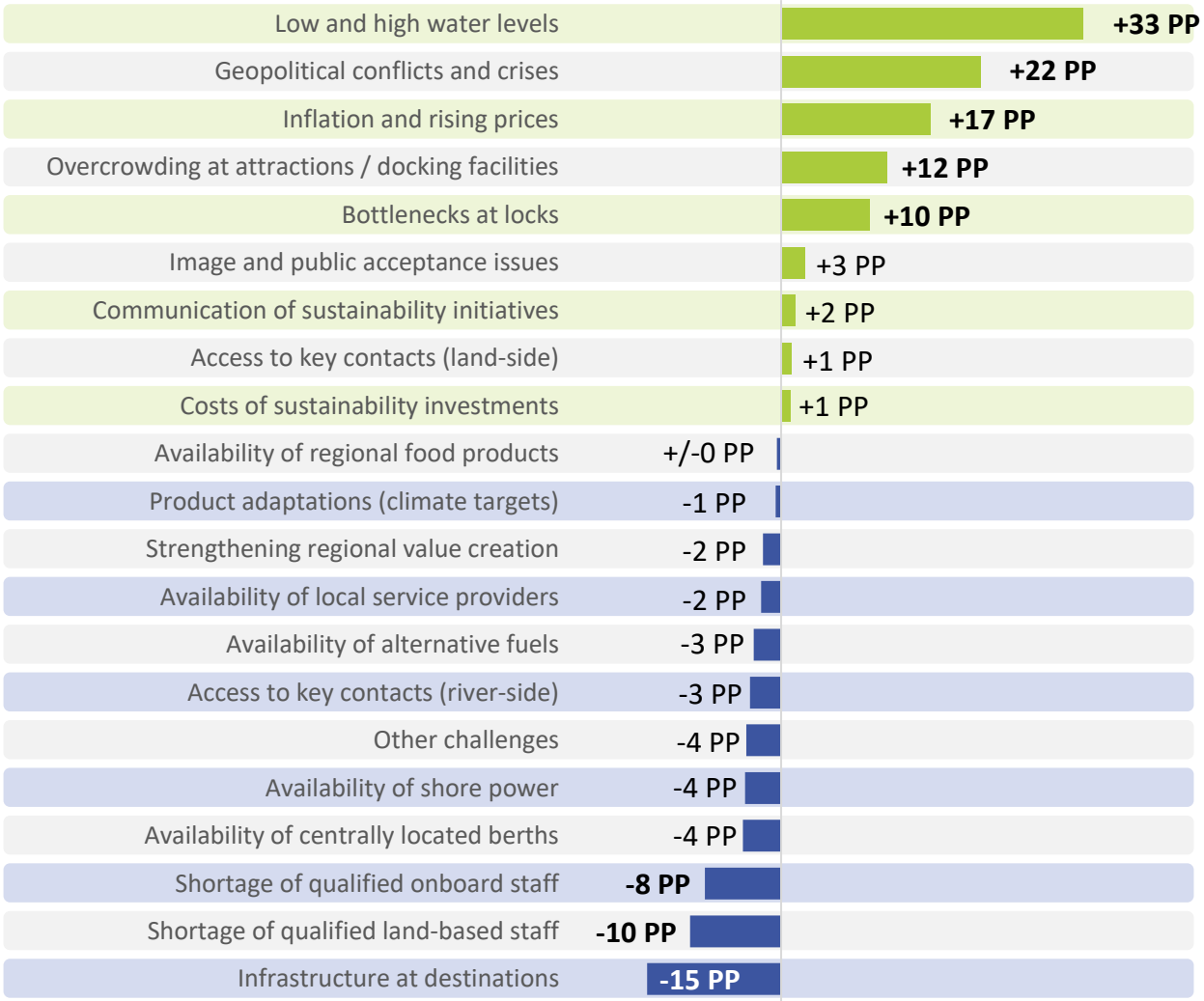
Selected challenges with the greatest differences compared to the river side



Conclusion

Low- and high-water conditions, rising costs, and geopolitical crises pose challenges for both sides. However, **their main concerns differ significantly**: While the river side is primarily confronted with limited berthing capacity and bottlenecks at locks, the land side is primarily concerned with access to key contacts as well as image and acceptance issues.

Acute Crises Are Gaining Prominence, While Structural Issues Are Taking a Back Seat (2026 vs. 2025)



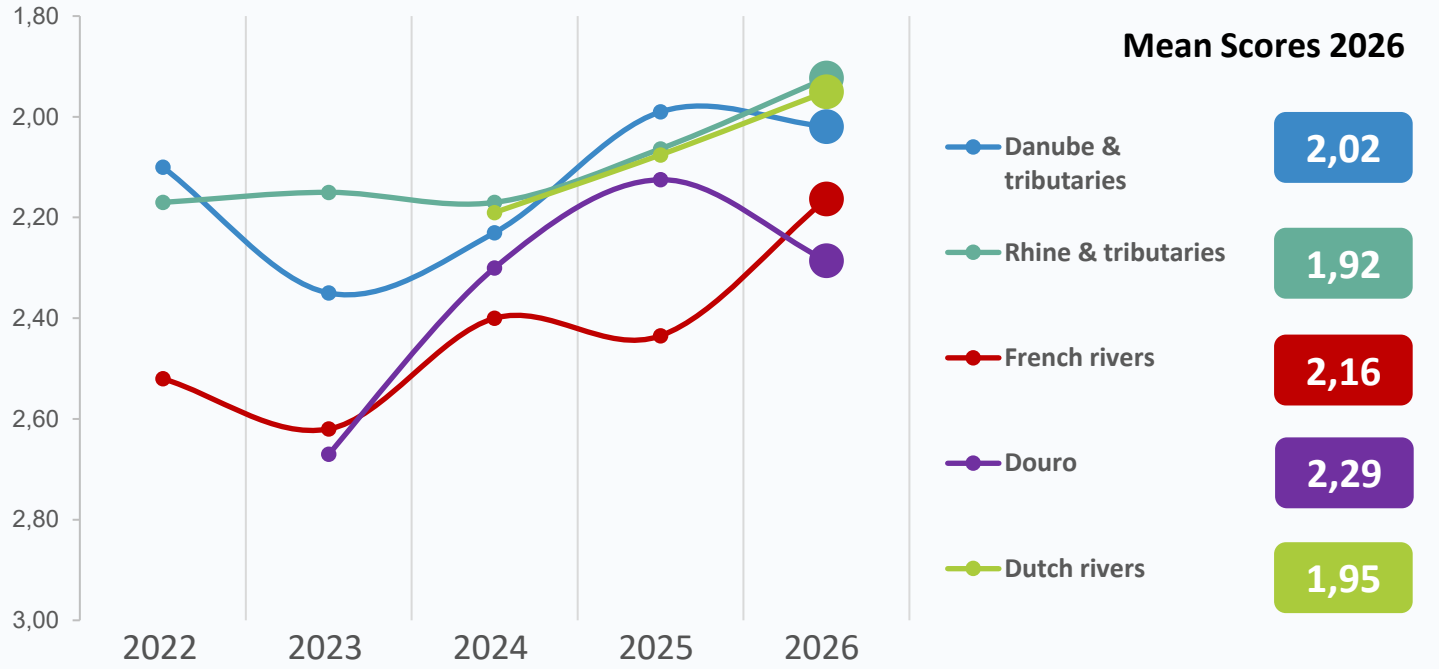
Interpretation of the Results

- **Acute challenges are increasingly dominating:** water-related issues (+33 PP), geopolitical crises (+22 PP), and general inflation (+17 PP) have become significantly more important compared to 2025.
- **Structural issues are taking a back seat:** Infrastructure deficits (-15 PP) and skilled labor shortages (-8 to -10 PP) are cited less frequently as the greatest challenges. However, this does not necessarily mean that these problems have been resolved.
- **Resilience requires long-term planning;** addressing structural challenges in particular creates important resources and room for maneuver to better cushion future crises.

Example: In 2026, 79% of respondents cited low-water and high-water conditions as one of the greatest challenges, compared to 46% in 2025. This represents an increase of 33 percentage points. Base: Industry Survey 2025 (n=137) and 2026 (n=175). Up to five responses per person were allowed. Presented as the difference between the respective response percentages in percentage points (2026 minus 2025). Some item wording has been slightly modified.

Collaboration Largely Satisfactory – But Room for Improvement

F10 How satisfied are you with the collaboration with partners and stakeholders in the river cruise industry along the following rivers?
Base: all respondents excluding "don't know" and "no answer"; n_Danube=155, n_Rhine=78, n_French rivers=49, n_Douro=35, n_Dutch rivers=60
Mean scores on a scale from 1 = very satisfied to 5 = very dissatisfied



→ **Positive overall picture**

Collaboration is rated positively across all river regions, although ratings have not yet reached a consistently very high level.

→ **Diverging trends**

Ratings improve for the Rhine, Dutch and French rivers, while the Danube and Douro show a slight and more pronounced deterioration, respectively.

→ **Room for improvement remains**

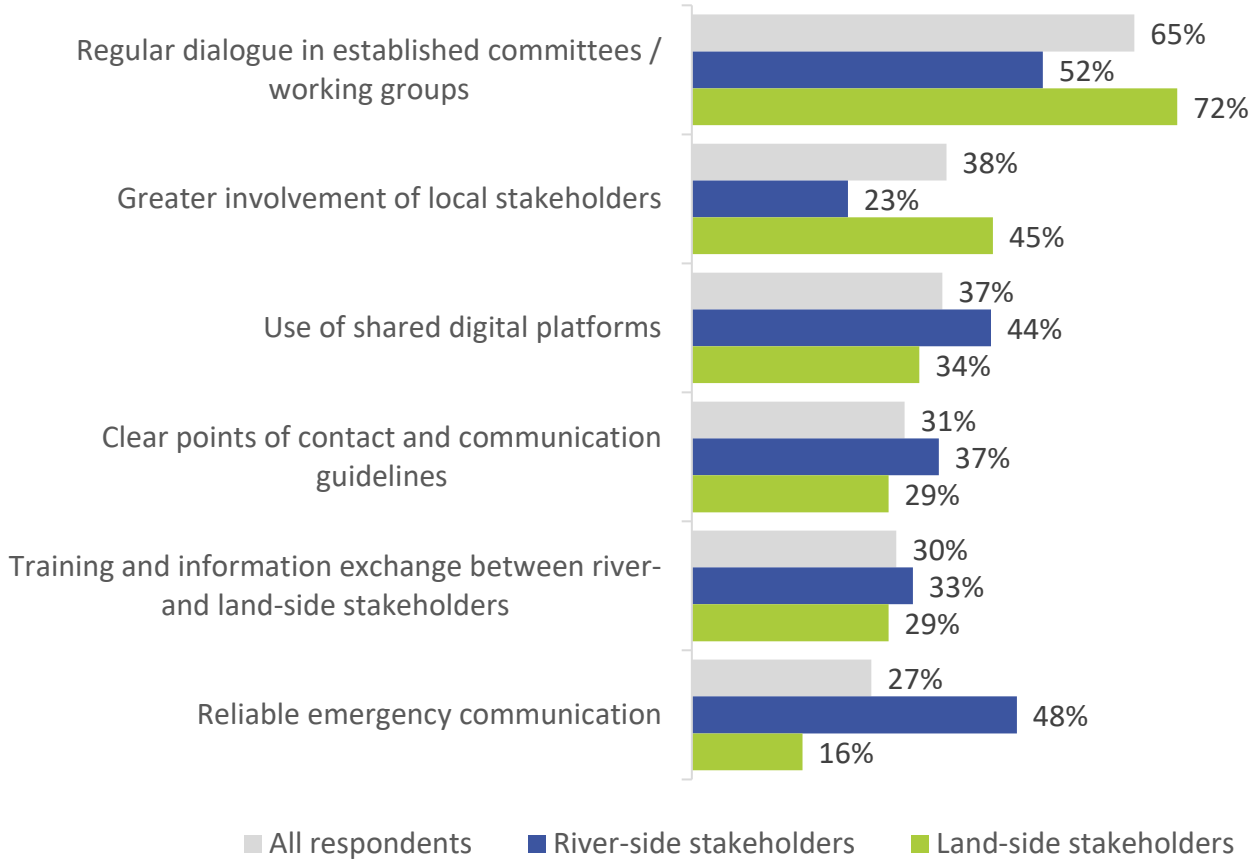
There is still potential to strengthen collaboration, particularly along the Douro, but also along the French rivers and the Danube.

→→→

Challenging times reveal how well collaboration really works – and where further improvements are needed.

Regular Dialogue Strengthens Collaboration

F10_2 What are the most urgent improvements needed to strengthen communication and collaboration among stakeholders in the river cruise industry? Select up to three options.
Base: all respondents; n=162, excluding "don't know" and "no answer"



Other responses: Other suggestions for improvement: 2%; no need for improvement: 3%
(river-side: 4%, land-side: 2% and 3%, respectively)

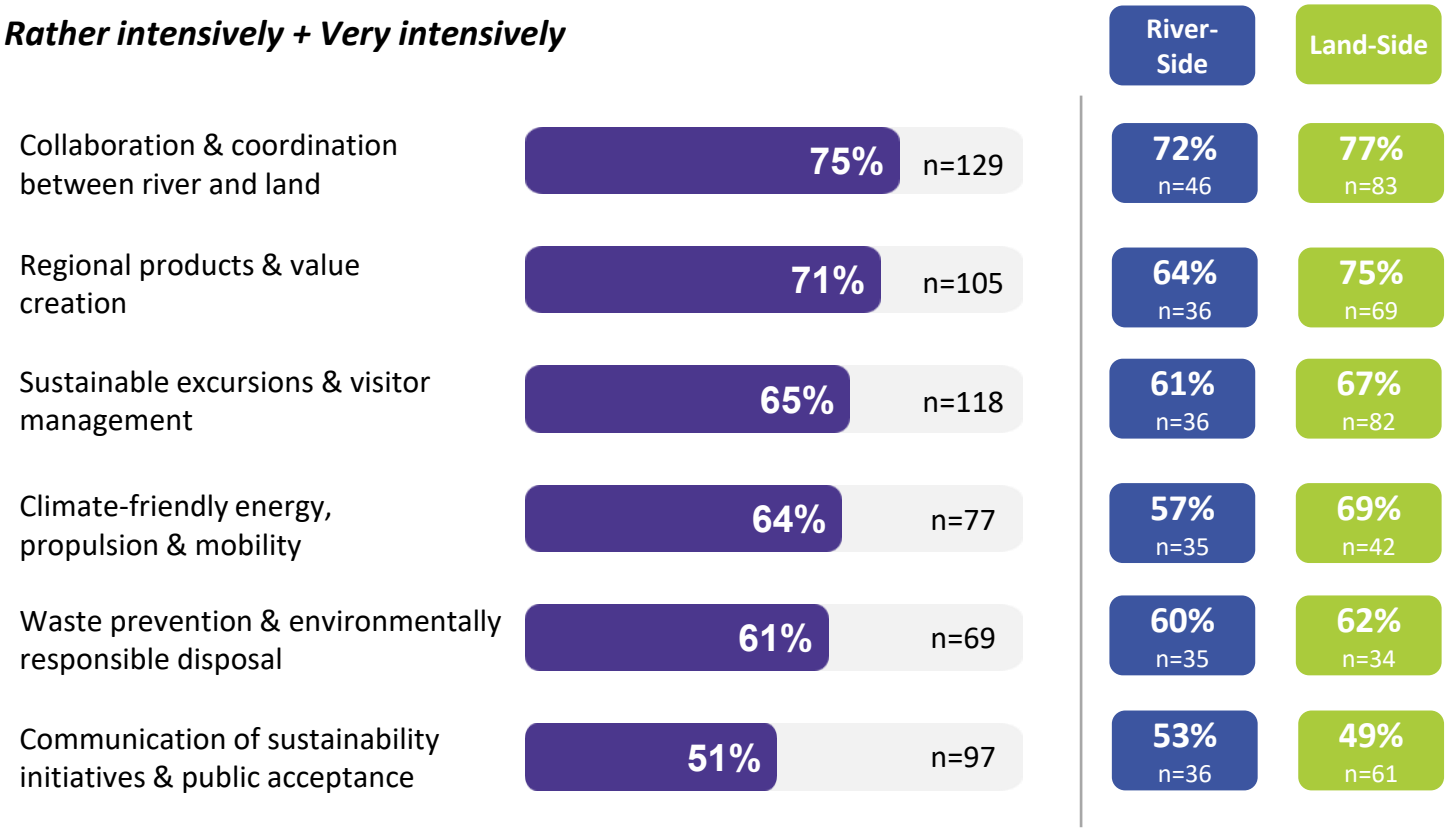
Key findings

- **Regular dialogue** is the top priority: 65% call for more structured exchange through established committees or working groups.
- **Land-side stakeholders** prioritise collaboration: **Regular dialogue** (72%) and **greater involvement of local stakeholders** (45%) are particularly important to them.
- **River-side stakeholders** focus on operational communication: Reliable **emergency communication** (48%) and **shared digital platforms** (44%) are their main priorities.
- **Clear need for action**: Only 3% see no need for improvement, highlighting the broad demand for stronger collaboration.

Collaboration and regional value creation receive the greatest attention

F12 How intensively are you currently working on the following areas of action related to river cruising along the Danube within your area of responsibility? Please consider both ongoing initiatives and activities currently being prepared or planned.
Base: all respondents

Rather intensively + Very intensively



Key findings

- → **Collaboration and regional value creation lead the way**: Collaboration between river- and land-side stakeholders (75%) and regional products and value creation (71%) receive the greatest attention.
- → **Land-side stakeholders show stronger engagement:** Land-side stakeholders report higher levels of engagement across several areas, particularly regional value creation (75% vs. 64%) and climate-friendly energy and mobility (69% vs. 57%).
- → **Communication and public acceptance receive less attention:** Communicating sustainability initiatives and promoting public acceptance of river cruising receive the lowest level of intensive engagement (51%).

Scale: 1 = not at all intensively to 4 = very intensively. Valid responses exclude "not within our area of responsibility" and "no answer".

Sustainability and Booking Decisions

F13_1 In your opinion, do sustainability initiatives generally influence your guests' booking decisions when choosing a river cruise?
Base: River-side stakeholders involved in marketing river cruises

F13_2 If sustainability initiatives influence booking decisions, do you think these guests are also willing to pay a premium for them?

Impact of Sustainability Initiatives on Booking Decisions

Valid responses: n=34



- Yes, for most of our guests (n=2)
- Yes, for some of our guests (n=18)
- No, little impact so far (n=14)

Follow-up question …

Willingness to Pay a Premium

Valid responses: n=20



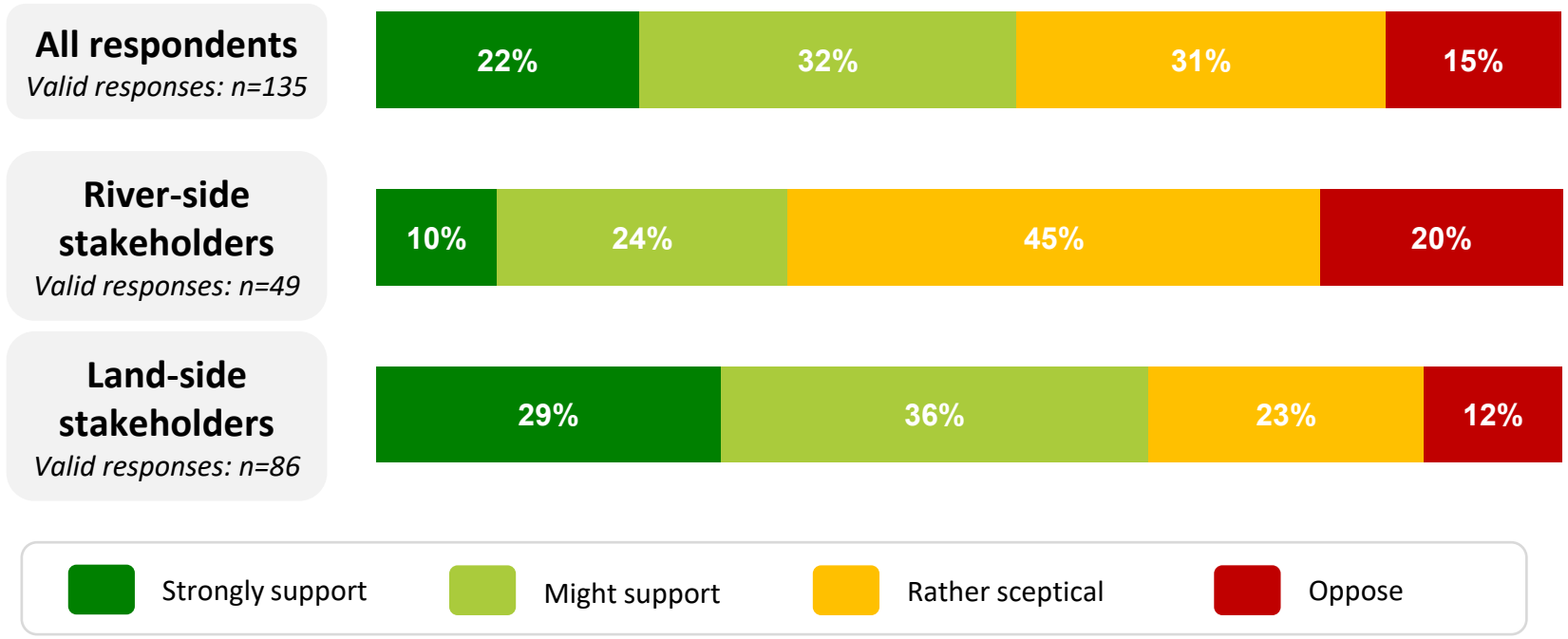
- Yes, for most sustainability-conscious guests (n=4)
- Yes, for some sustainability-conscious guests (n=12)
- No, most are unwilling to pay more (n=4)

Conclusion Sustainability initiatives influence booking decisions for at least some guests. However, willingness to pay a premium remains limited.

"Don't know" and "no answer" responses excluded. | F13_2: Conditional follow-up question.

Attitudes Towards a Mandatory CO_2 Levy

F14 How would you feel about a mandatory CO_2 levy on river cruises?
Base: all respondents; n=135; valid responses excluding "don't know" and "no answer"



Conclusion

Land-side stakeholders are more open to a mandatory CO_2 levy, while scepticism and opposition are considerably more pronounced among river-side stakeholders.



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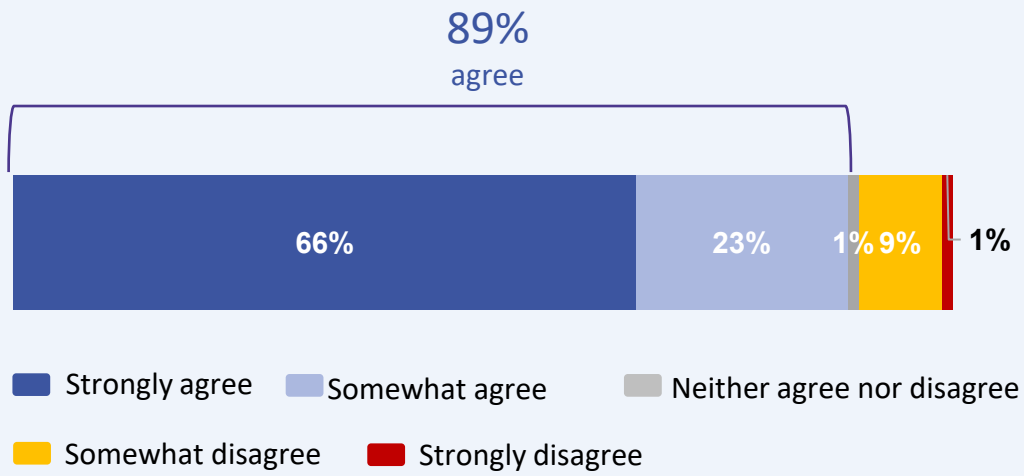
Questions on the Conference Topics

Image sources: AdobeStock / Phaigraphic, Doziana, InfiniteFlow

Industry Resilience: Openness and Ability to Act

Openly Addressing Safety Concerns

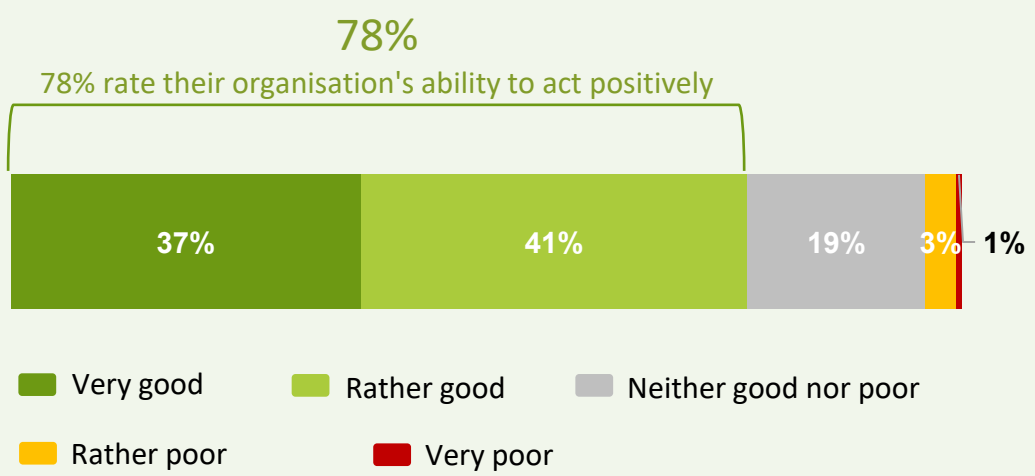
„In our organisation, employees can openly raise safety concerns, risks or mistakes without fear of negative consequences.“



Ø 4,44 out of 5
(n=160, excluding “cannot assess” and “no answer”)

Maintaining the Ability to Act Despite Uncertainty

„How well is your organisation currently able to remain effective despite the many uncertainties and challenges facing the river cruise industry?“



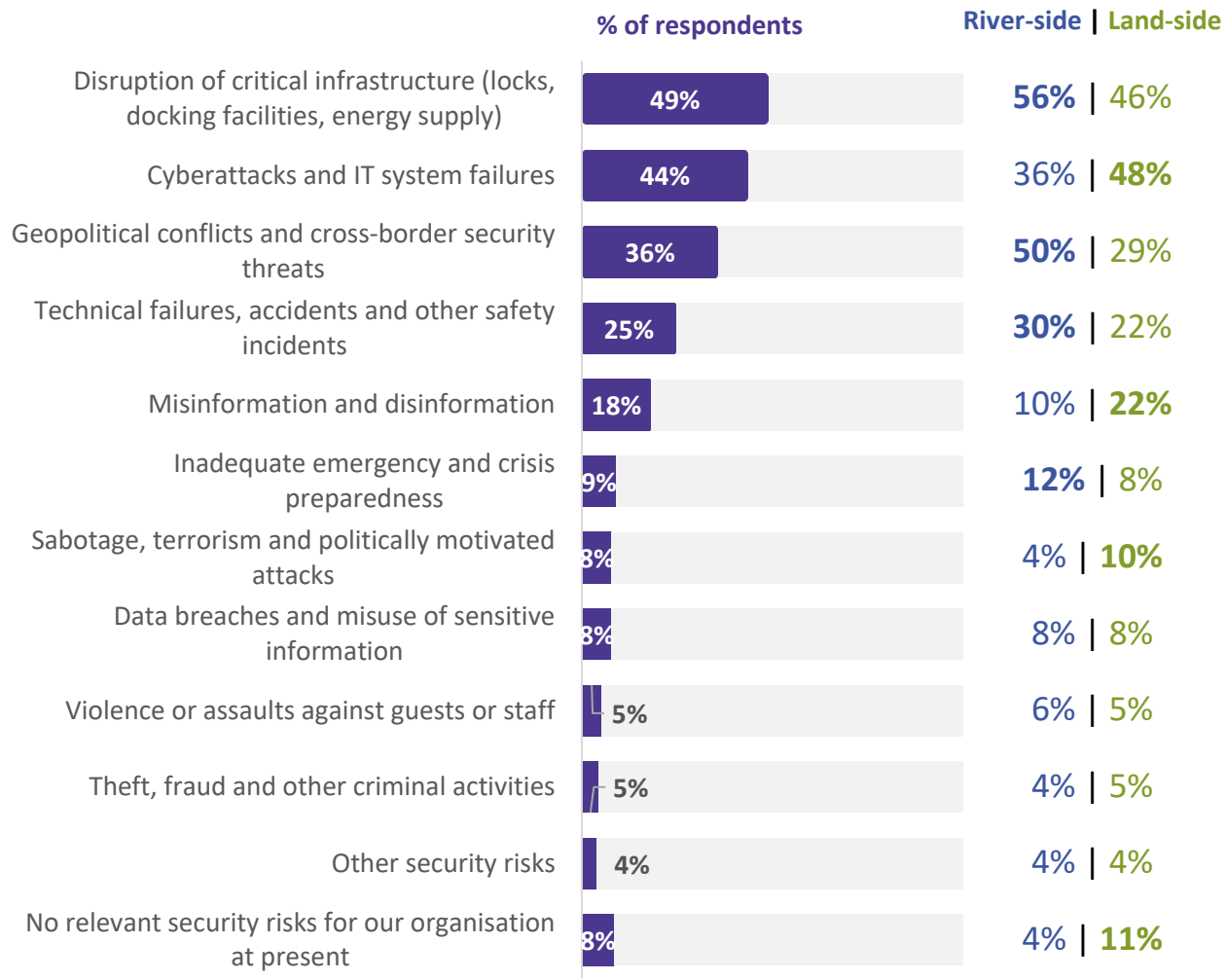
Ø 4,10 out of 5
(n=155, excluding “cannot assess” and “no answer”)

Conclusion

The river cruise industry shows **strong resilience**: 89% report open communication on safety issues, while 78% feel their organisation remains effective despite uncertainty.

Key Security Risks Facing the Industry

S1 Which of the following security risks are currently most relevant to your organisation?
Base: all respondents; multiple responses allowed (max. 3); n=153 (river-side: n=50, land-side: n=103), excluding "cannot assess" and "no answer"



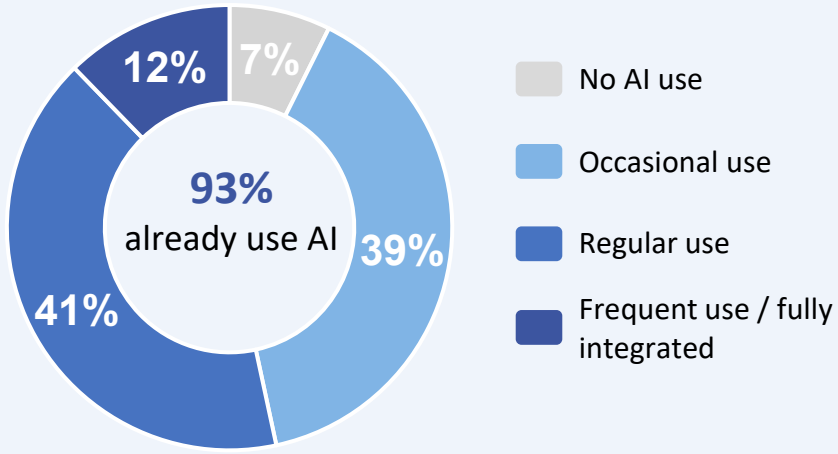
Conclusion

- Infrastructure disruptions, cyberattacks and geopolitical tensions top the industry's list of security concerns.
- River-side stakeholders place greater emphasis on infrastructure disruptions and geopolitical threats, while land-side stakeholders are more concerned about cyberattacks and misinformation.

AI Adoption and Challenges

Current State of AI Adoption

„Which of the following statements best describes the current use of AI in your organisation or area of responsibility?“ | n=163



Key Challenges in AI Implementation

„What do you currently see as the biggest challenges to using artificial intelligence in the river cruise industry?”
Up to three responses allowed | n=137



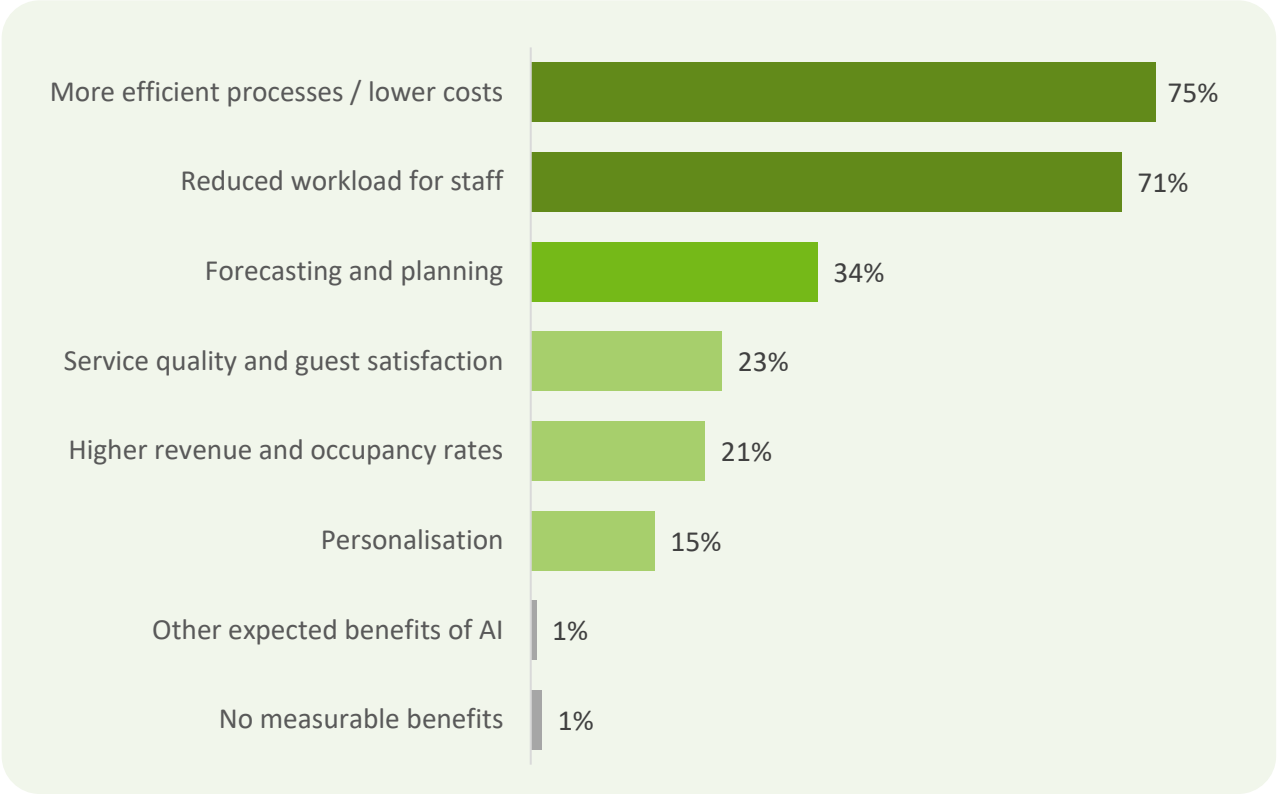
Valid responses exclude “cannot assess” and “no answer” for each question.

Conclusion

AI has become part of the industry – the challenge now lies in implementation.
While 93% already use AI, data quality, system integration and data privacy remain the main barriers to wider adoption.

AI: Efficiency Gains Expected to Lead by 2030

KI3 In which areas do you expect AI to deliver the greatest benefits to the river cruise industry by 2030?
Base: all respondents; n=148; up to three responses allowed; excluding “cannot assess” and “no answer”.



Conclusion

AI is expected to deliver its greatest value through efficiency gains and reduced staff workloads.

Benefits in personalisation, revenue growth and service quality are seen as less significant.

Final Question…

What Comes to Mind When You Think of Bucharest?

Associations With Bucharest



Base: 86 open-ended responses
Multiple responses possible; responses grouped by theme



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Thank You for Your Attention

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