Image Source: Adobe Stock

River Cruise Industry Survey #6

Autumn 2025

CENTOURIS

Study Design

Methodology

→ **Online-Survey**

→ **Target Group**: Stakeholders with a direct or indirect connection to the river cruise industry

→ **Focus**: Danube, Rhine, French rivers, Douro, Dutch rivers

Sample

127 complete and **22 partial interviews** with stakeholders, belonging to the target group.

Languages: G – Engl - F

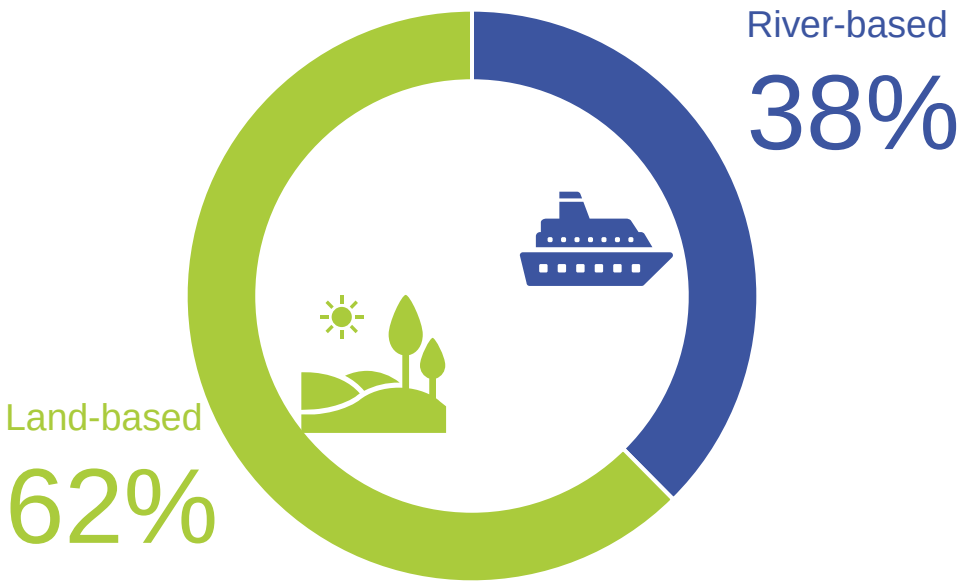
Duration

22. September to
23. October 2025

Participants by Industry

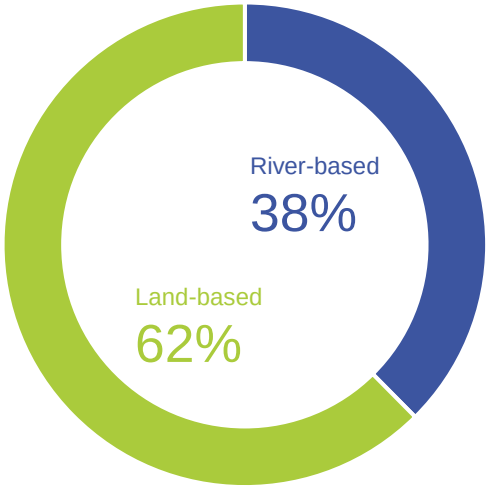
F1 Which industry do you belong to? If several industries apply, please choose your main industry.

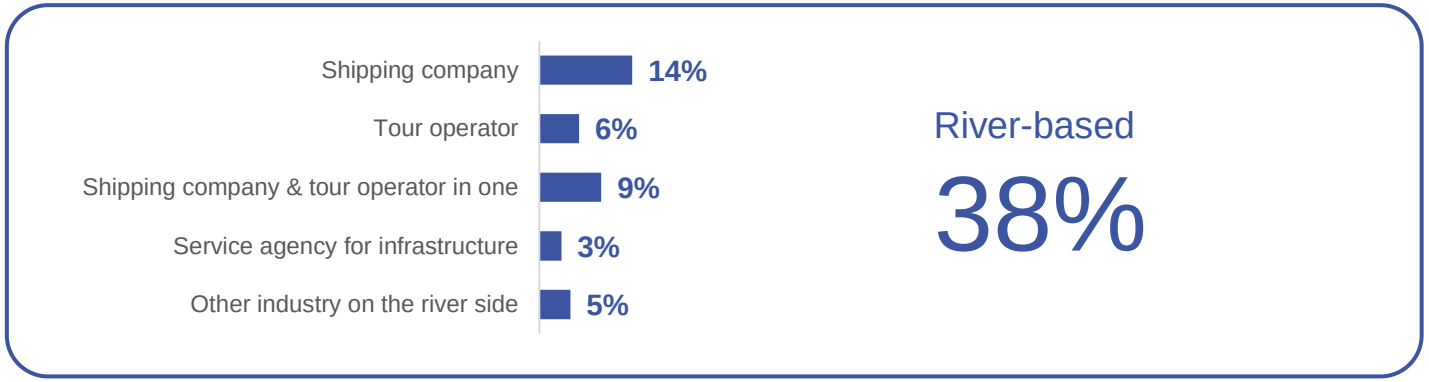
N=149, single choice only

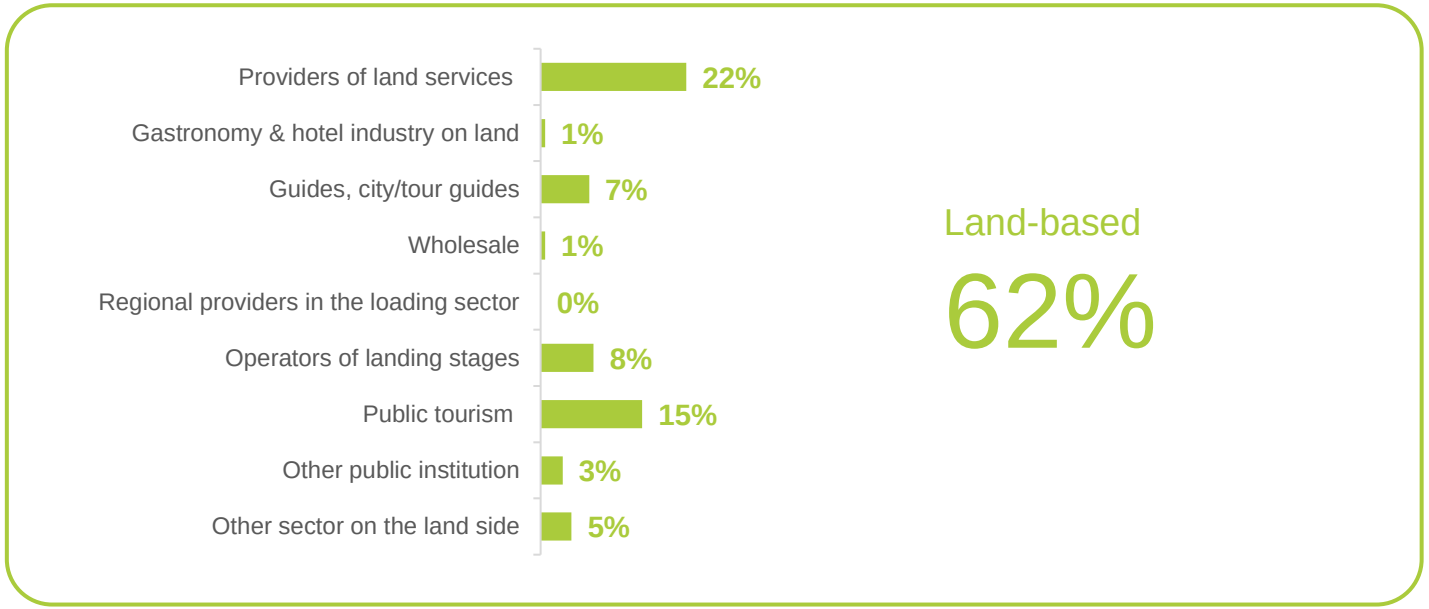


Participants by Industry

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





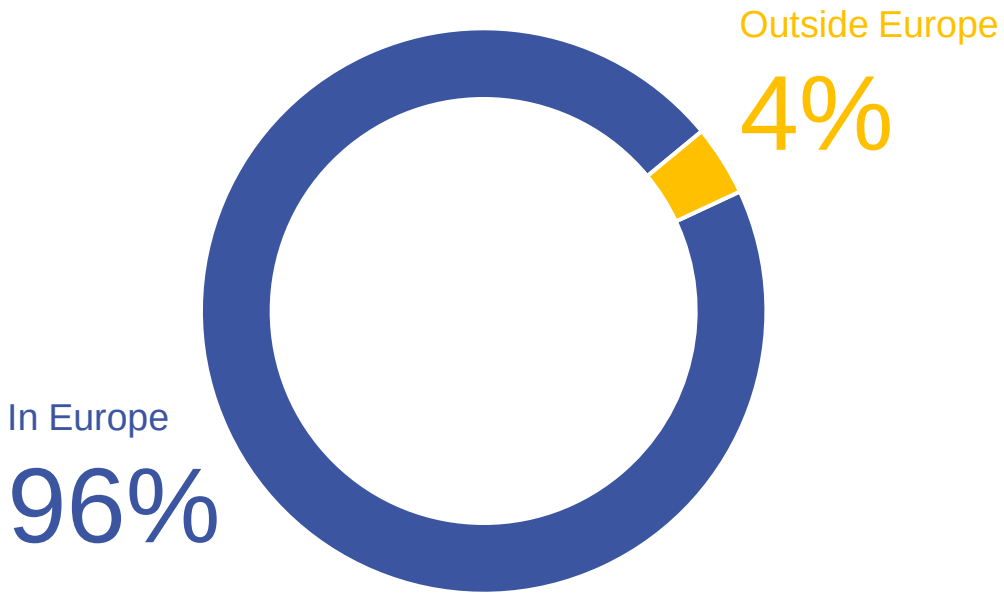


N=149, only one response was possible

Participants‘ Origin- Company Headquarters

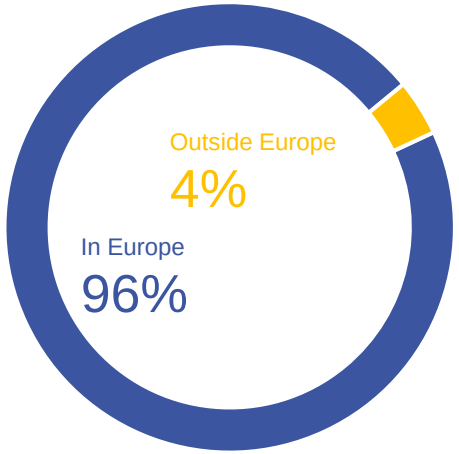
F3 Where is the permanent location of your company?

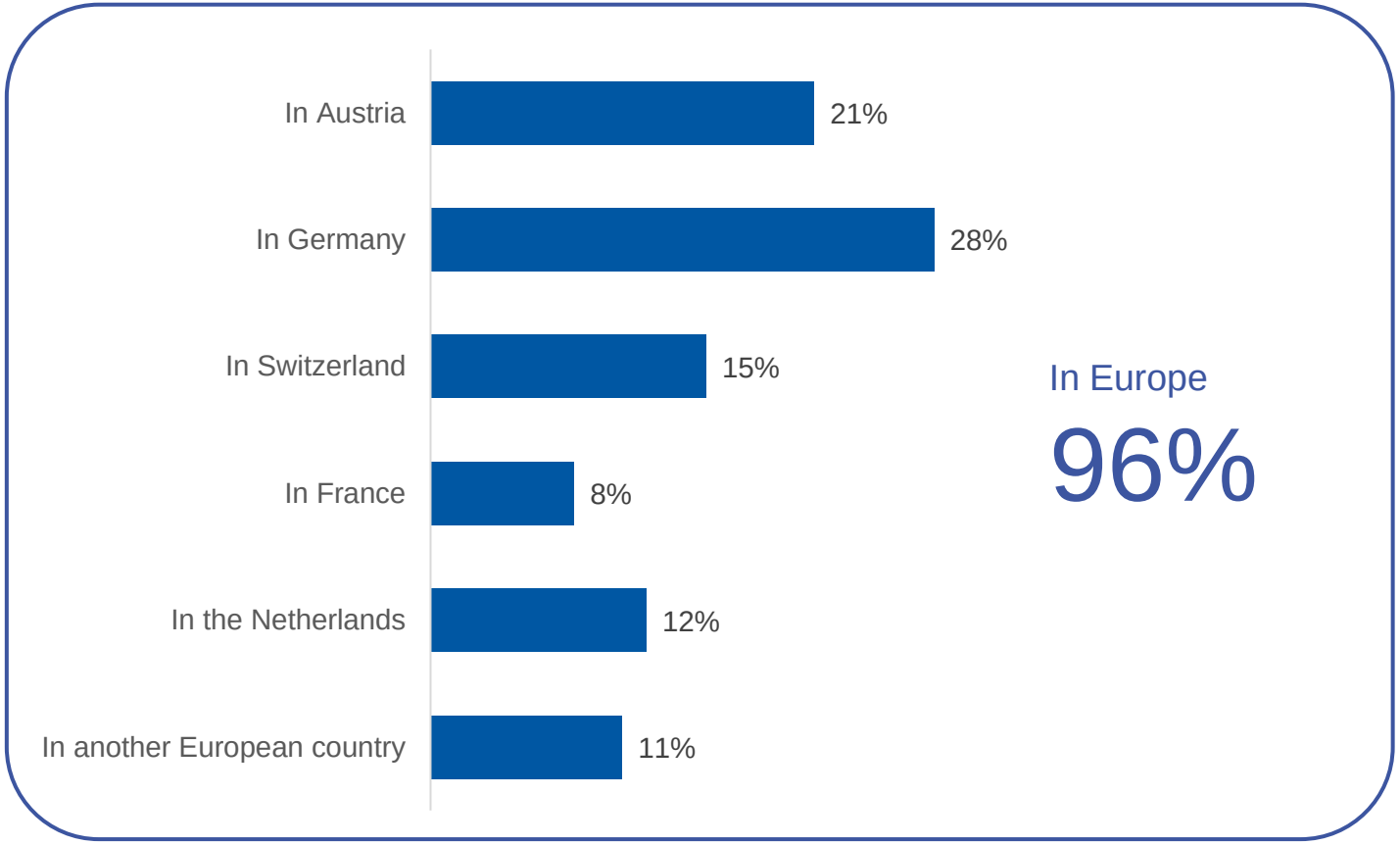
n=149



Participants´ Origin- Company Headquarters

F3 Where is the permanent location of your company? (n=149)





Source Markets, Travel Areas and Passenger Forecasts 2026 vs 2025

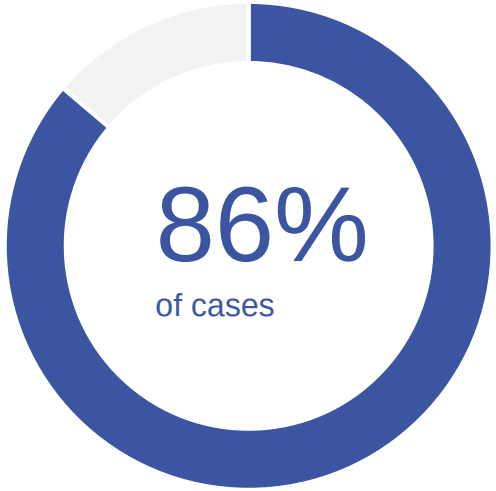
CENTOURIS

Important Source Markets

F4 Which source markets have a significant impact on your business success? Where is your focus? | Base: River-side stakeholders | n=59 | Multiple responses were possible.

OUTSIDE EUROPE

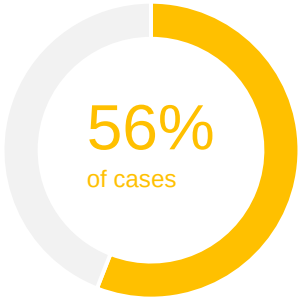
IN EUROPE

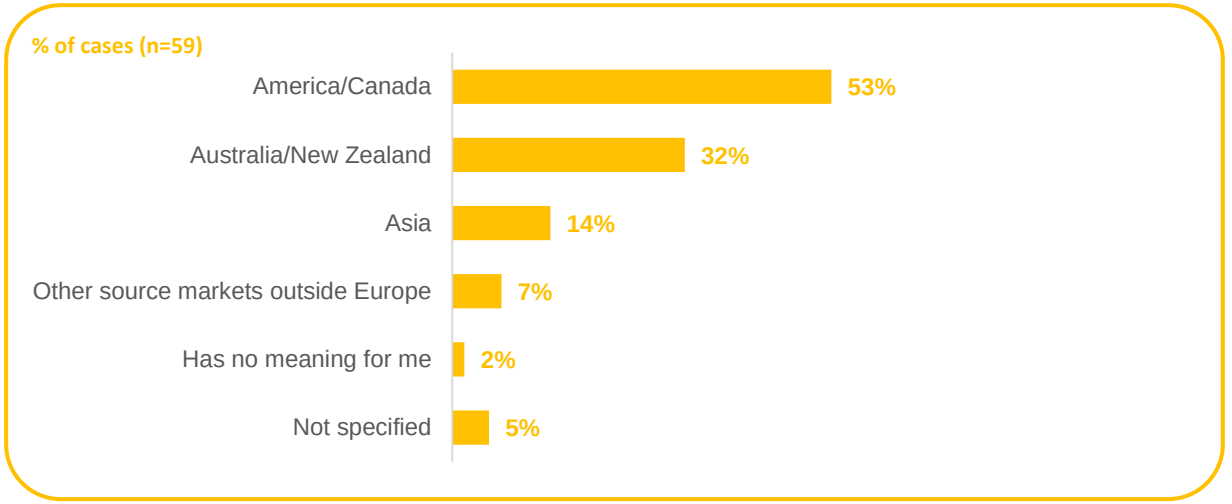


Important Source Markets

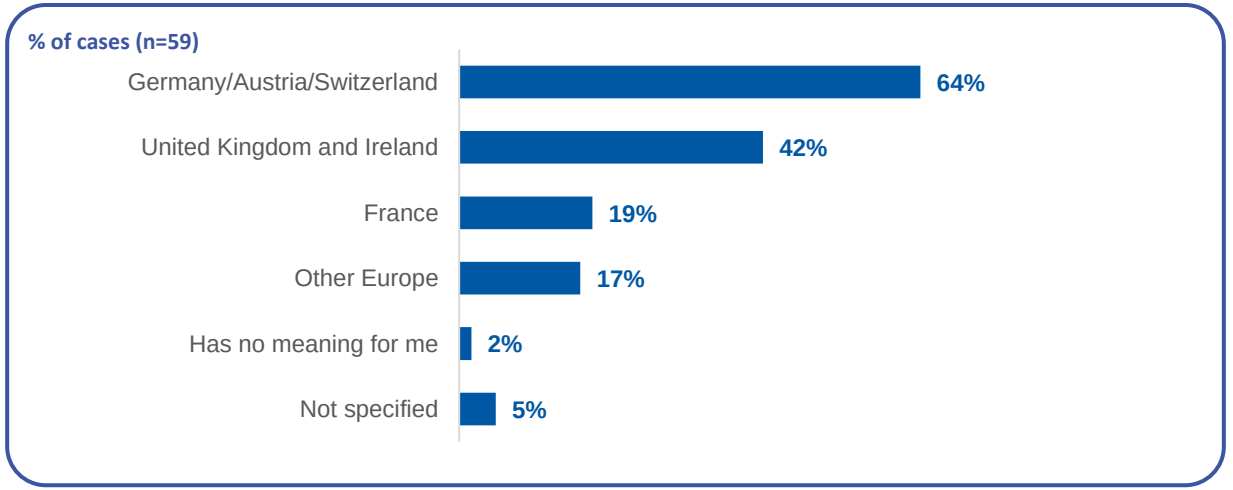
F4 Which source markets have a significant impact on your business success? Where is your focus? | Base: River-side stakeholders | n=59 | Multiple responses were possible.

OUTSIDE EUROPE



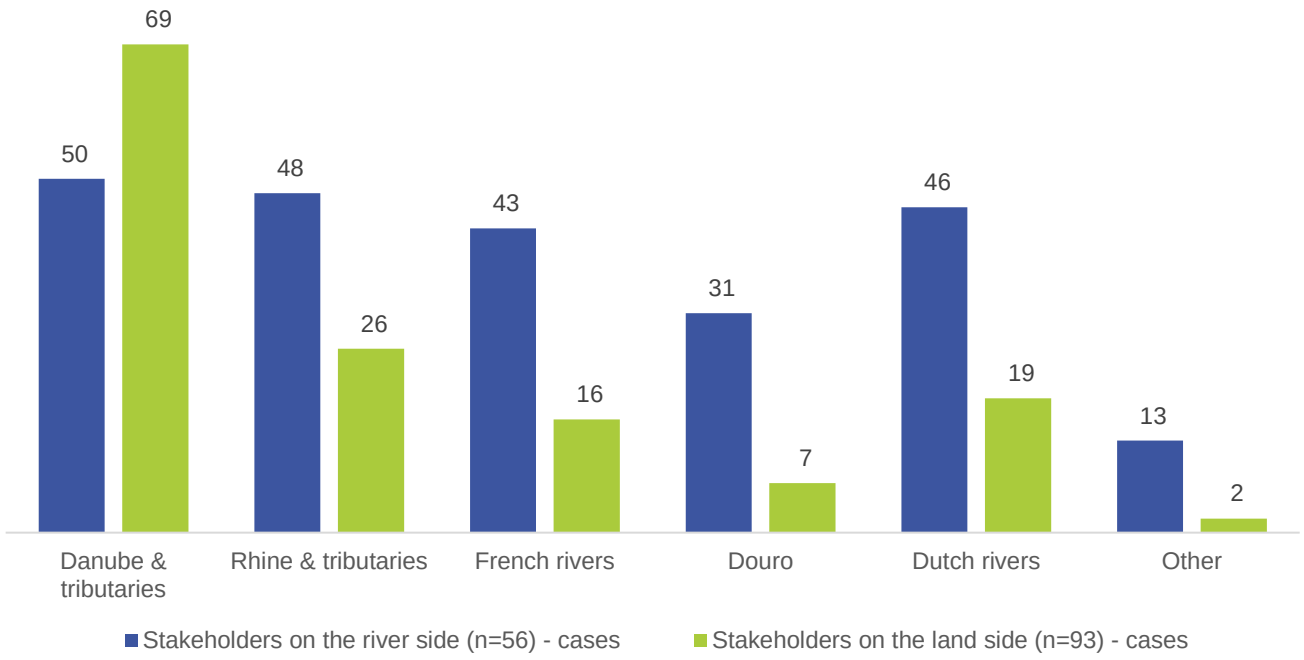


IN EUROPE



Relevant Cruising Areas

F5 Please select the travel areas or destinations relevant to your company/institution. | Base: all respondents| n=149 | Multiple responses were possible.



Other cruising areas

(25 mentions from 15 respondents)

6x Elbe
2x Mekong
2x Oder
2x Baltic Sea

One mention each

German canals and Baltic Sea
Asia (Mekong, Ganges)
Belgian rivers
World
Ganges
Havel
Croatia
Main
Moldau
Nile
Po
Rhone
Saar

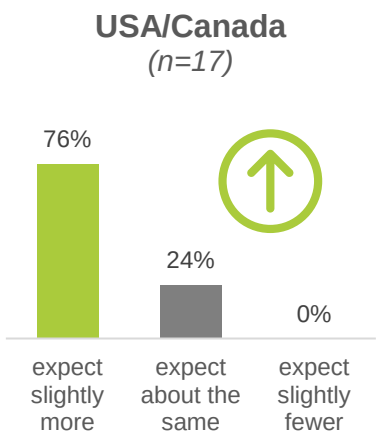
Development of Passenger Numbers

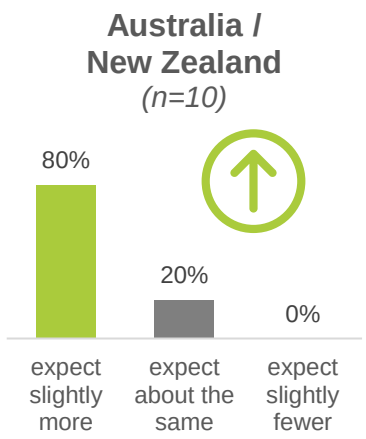
F8_D: Based on the current booking situation: How do you estimate the development of passenger numbers for the 2026 season compared to the 2025 season for the Danube?

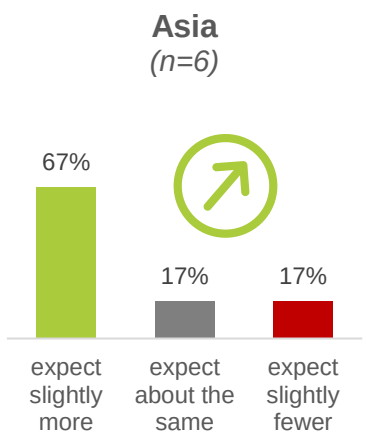
Base: River-side stakeholders relevant to the respective travel areas

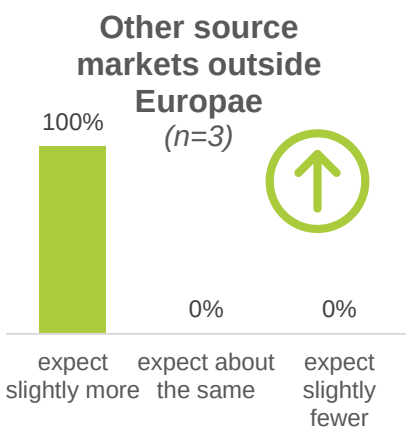
Danube – Source Areas Outside Europe

Expected number of passenger for 2026 compared to 2025









Development of passenger numbers

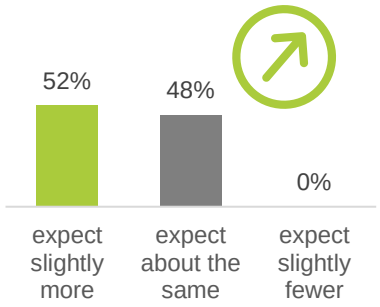
F8_D: Based on the current booking situation: How do you estimate the development of passenger numbers for the 2026 season compared to the 2025 season for the Danube?

Base: River-side stakeholders relevant to the respective travel areas

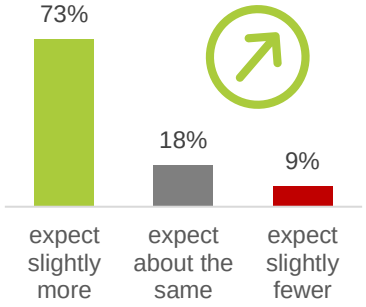
Danube – European source areas

Expected number of passengers for 2026 compared to 2025

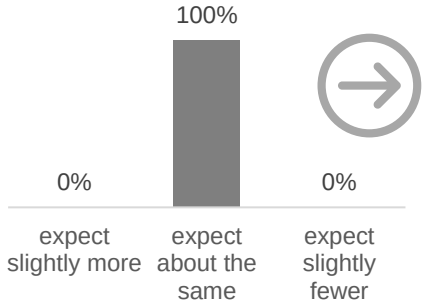
Germany/Austria/ Switzerland
(n=21)



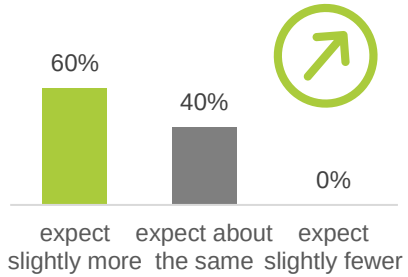
UK / Irleand
(n=11)



France
(n=2)



Other European countries
(n=5)



PAX 2026 vs 2025 - Overview

Base: River-side stakeholders relevant to the respective travel areas

	Danube	Rhine	French Rivers	Douro	Dutch Rivers
USA/Canada	↑ (17)	↑ (16)	↗ (14)	↗ (12)	↗ (15)
Australia/New Zealand	↑ (10)	↑ (11)	↗ (10)	↗ (7)	↑ (9)
Asia*	↗ (6)	↑ (4)	↗ (3)	↑ (2)	↗ (3)	
Other*	↑ (3)	↑ (2)	↑ (2)	↑ (1)	↑ (1)
Germany/Austria/Switzerland	↗ (21)	↗ (19)	↗ (13)	↗ (10)	↗ (16)
United Kingdom & Ireland	↗ (11)	↑ (12)	↗ (10)	↗ (8)	↗ (10)
France*	→ (2)	→ (1)	→ (1)	↓ (1)	↗ (2)
Other*	↗ (5)	↑ (5)	↗ (3)	↑ (1)	↗ (4)

limited number of cases!

Number of cases (n)

75% and more indicate „increasing PAX“.

↑ (12)

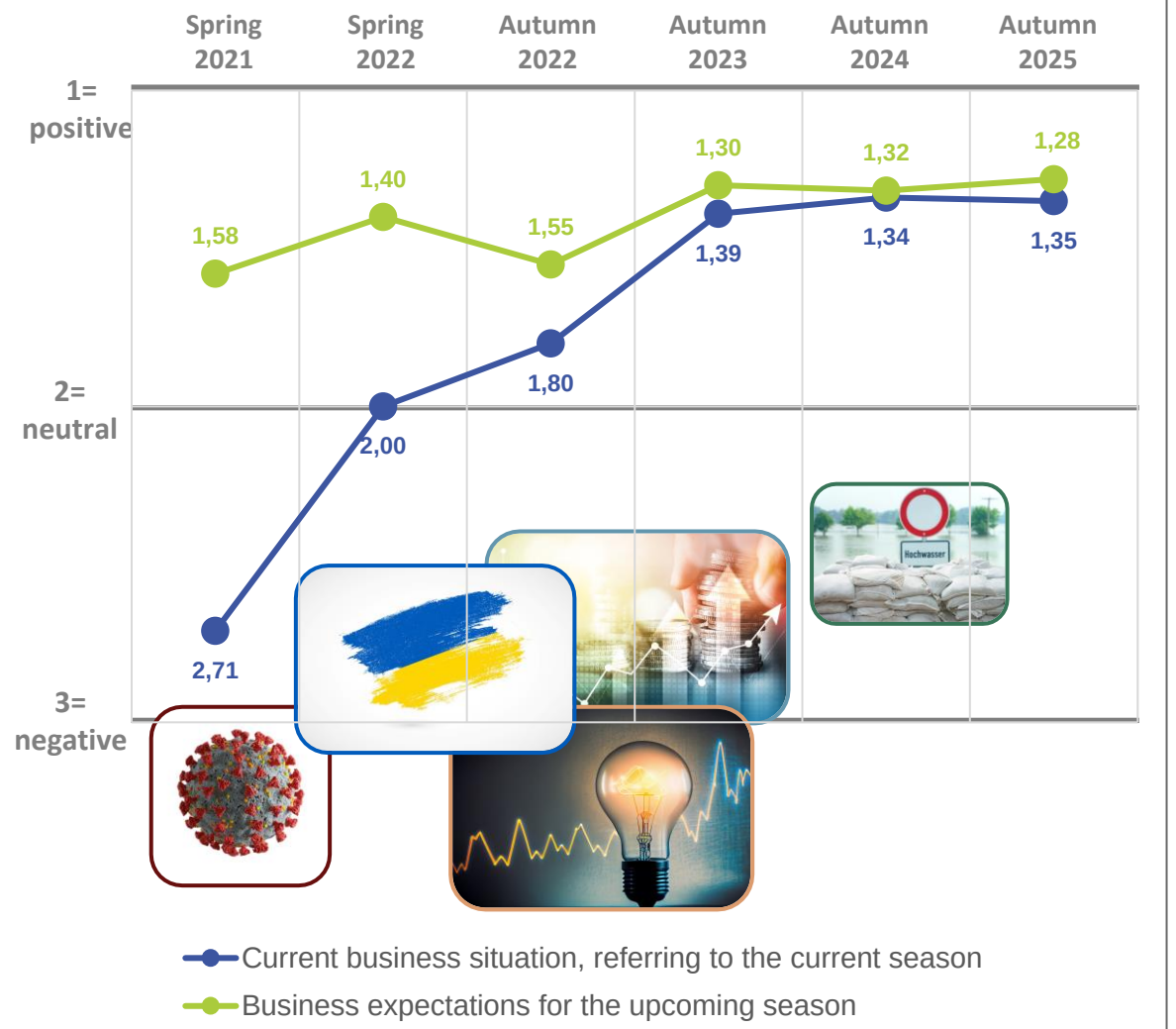
Business Situation & Industry Sentiment

CENTOURIS

Business Situation and Expectations

F6 Please rate the following aspects in general in relation to your company/institution on 3-point scale. | Base: All respondents

Time comparison – mean values [scale from 1 = positive, 2 = neutral, 3 = negative]



Industry Sentiment

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

relaxed – neither – tense

certain – neither – uncertain

optimistic – neither – hopeless

Industry Sentiment

F7 Please describe the current mood in your company or institution with regard to the river cruise.

Base: All respondents | n=149

relaxed – neither – tense
certain – neither – uncertain
optimistic – neither – hopeless

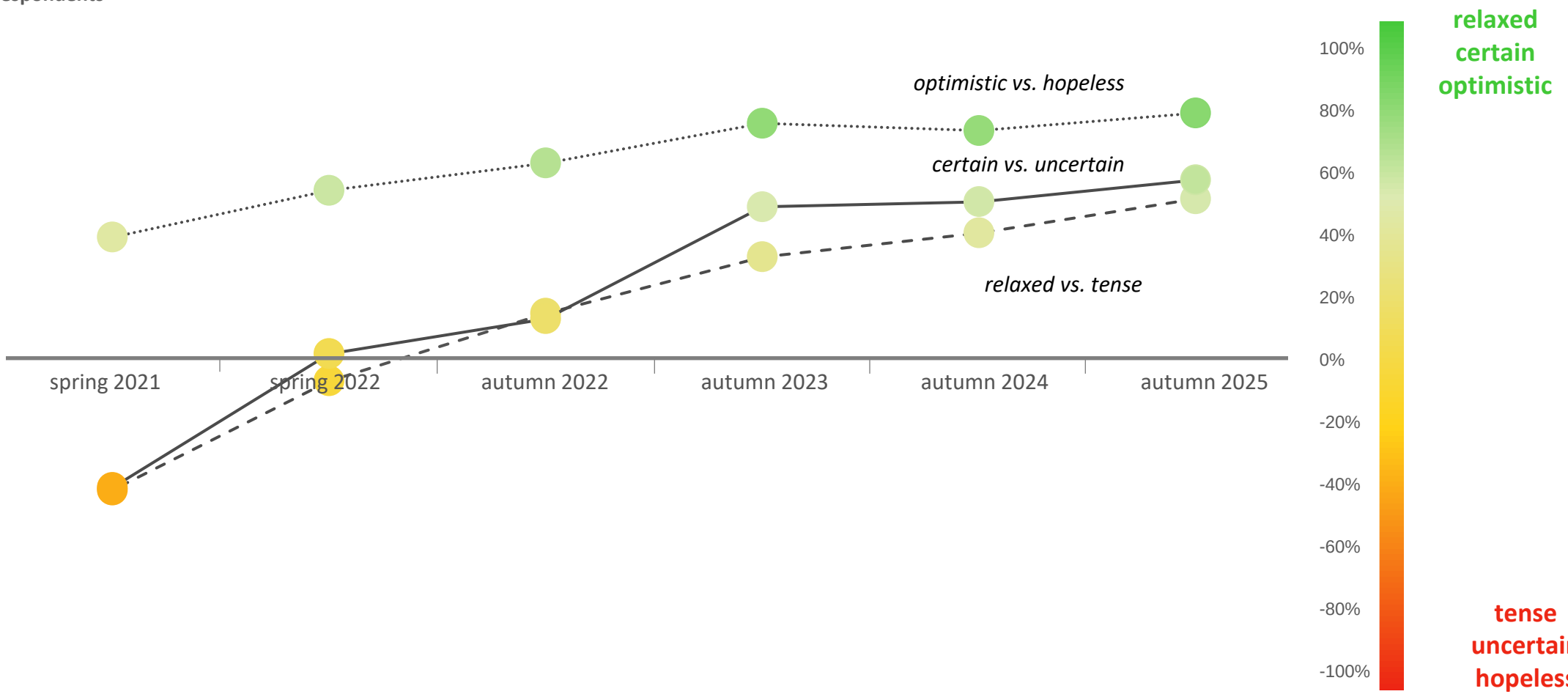
Net-Mood-Score

Percentage of “positive expression“ (green)
–
Percentage of “negative expression“ (red)

→ The greater the positive difference, the better the mood!

Industry Sentiment – Time Comparison

F7 Please describe the current mood in your company or institution with regard to the river cruise.
Base: All respondents



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

Challenges & Measures for Better Cooperation

CENTOURIS

Biggest Challenges

„Please select the biggest river cruise challenges for you from the list below. “

Up to 5 responses possible

543 responses

from 126 respondents

No challenges: 5 | No answer: 6

Biggest Challenges

F9 Please select the biggest river cruise challenges for you from the list below. You can check up to 5 challenges. | Base: All respondents

543 responses

1

Infrastructure

141 responses

2

Environment & Sustainability

140 responses

3

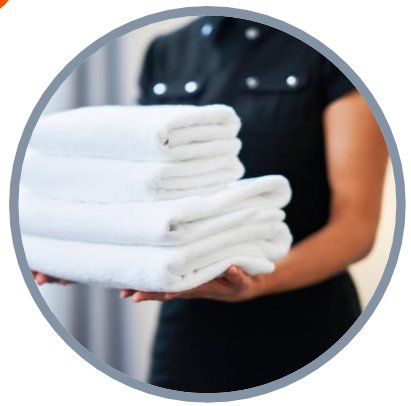
Profitability

88 responses

4

Staff / Skilled Labor Shortage

70 responses



5

Communication

48 responses

6

Image & Acceptance Challenges

27 responses

7

Others

29 responses

Key Challenges

River Side

- Limited availability of **desirable berths**
- **Staff shortages** on board
- **Technical and operational issues** in focus (locks, service partners, energy supply)

perceived equally by both sides

- **Low and high water levels** as well as **infrastructural bottlenecks at destinatons,** are among the biggest challenges
- **Rising costs** and **skilled labor shortage** heavily burdens both sides

Land Side

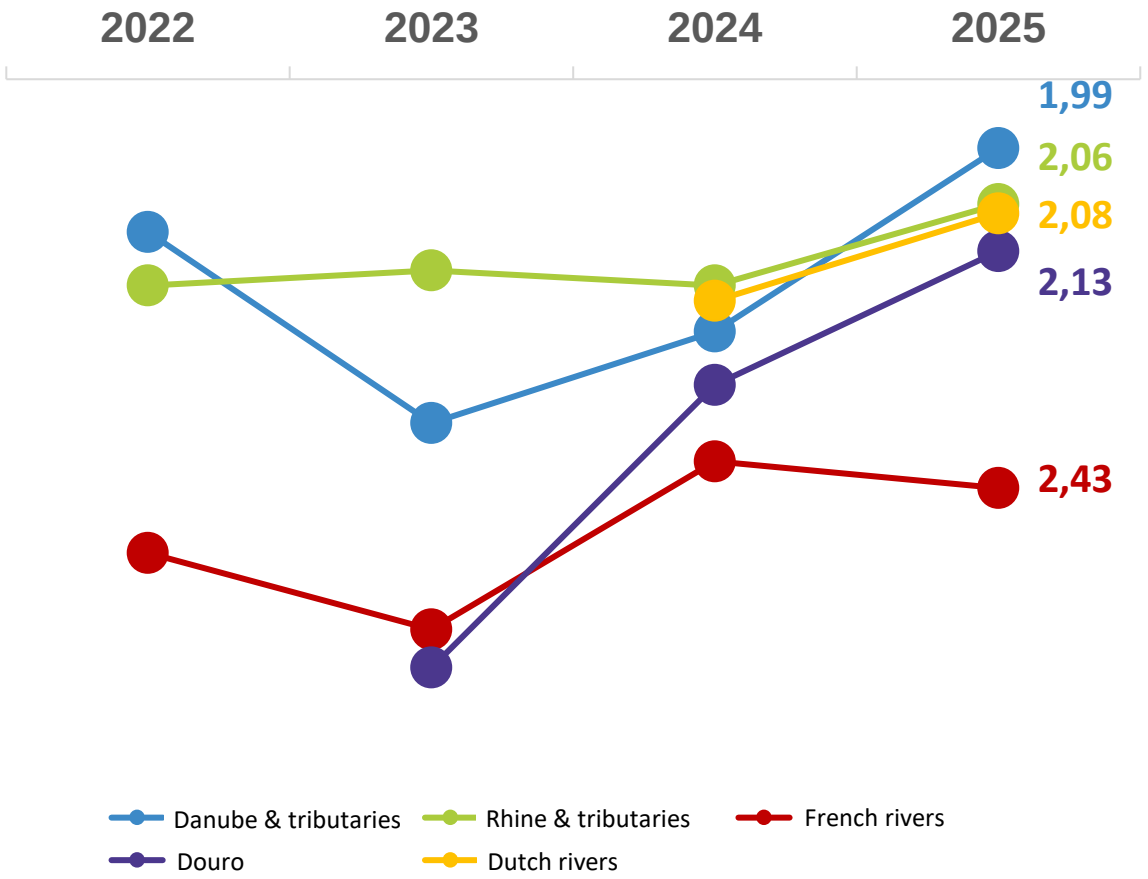
- **Skilled labor shortage**
- Need for **better coordination** with stakeholders on the river-side
- **Image- and acceptance topics** as well as **regional value creation** are more prominent

CONCLUSION

While climatic, infrastructural, and staffing constraints affect both sides equally, a clear pattern emerges: the river side is more affected by technical, operational, and logistical challenges, whereas the land side is more impacted by communication-related and image-related issues.

Satisfaction with Cooperation Has Increased Along Almost All Rivers

F10 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 | Base: All respondents, n_{Danube}=102, n_{Rhine}=63, $n_{fr.\ rivers}$=46, n_{Douro}=24, $n_{ducth\ rivers}$=53



CONCLUSION

In 2025, the values are mostly in the **"satisfied" (≈ 2,0)** range and show an **improvement compared to 2023 and 2024** (exception: French rivers).

River-Side More Satisfied Than Land-Side!

River Side vs. Land Side

Across all rivers, **river-side stakeholders tend to be more satisfied** with the cooperation than those on the land side. The **largest differences** appear on the **Danube** and the **Rhine**, while the **French rivers show an overall lower satisfaction level** – with **land-side stakeholders being slightly more satisfied than those on the river side**.

Creating Structures, Strengthening Exchange

F10_2 In your opinion, what should be improved most urgently in order to strengthen communication and cooperation between river cruise stakeholders?

Base: All respondents | TOP 4 mentions

River Side

- Regular exchange in fixed committees
- Use of shared digital platforms
- Clear points of contact
- Reliable emergency communication

Land Side

- Regular exchange in fixed committees
- Better integration of local stakeholders
- Training & information exchan between river and land
- Use of shared digital platforms

CONCLUSION

Both sides primarily wish for more **regular exchange formats and clearer communication structures**.
While the **river side** places **greater emphasis on reliability and responsibilities**, the **land side** highlights the **involvement of local stakeholders** and the **exchange of knowledge**.

Austria Guides: Bottlenecks Despite Generally Good Availability

Base: tour operators, providers of land services, guides, public tourism
Availability: n=42; Language: n=45

Availability

48 % sufficient, bottlenecks in Linz & the Wachau Valley during peak season

Languages

47 % sufficient, missing guides especially for English, Spanish, Mandarin, French

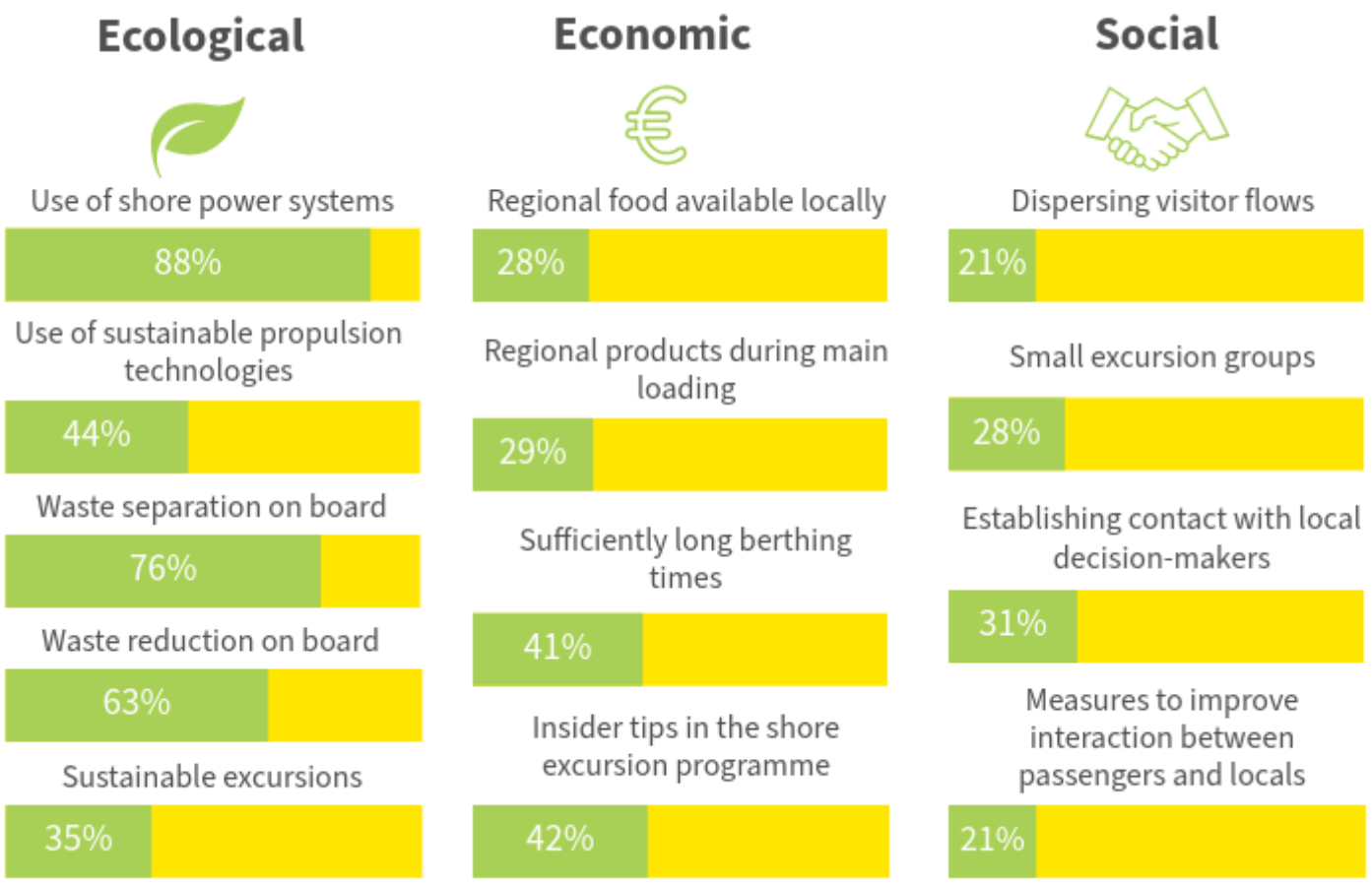
CONCLUSION

Overall, the availability of Austria Guides is mostly considered sufficient.
However, there are **occasional bottlenecks**—particularly in **Linz, the Wachau region, during the high season, and for certain languages (English, Spanish, French, Mandarin).**

Sustainability Along the Danube: River-Side

F12_F To what extent do you currently implement the following sustainability measures on your river cruises along the Danube in your area of responsibility?

Base: River-side stakeholders| green: mostly implemented; yellow: partially implemented or in planning & not yet

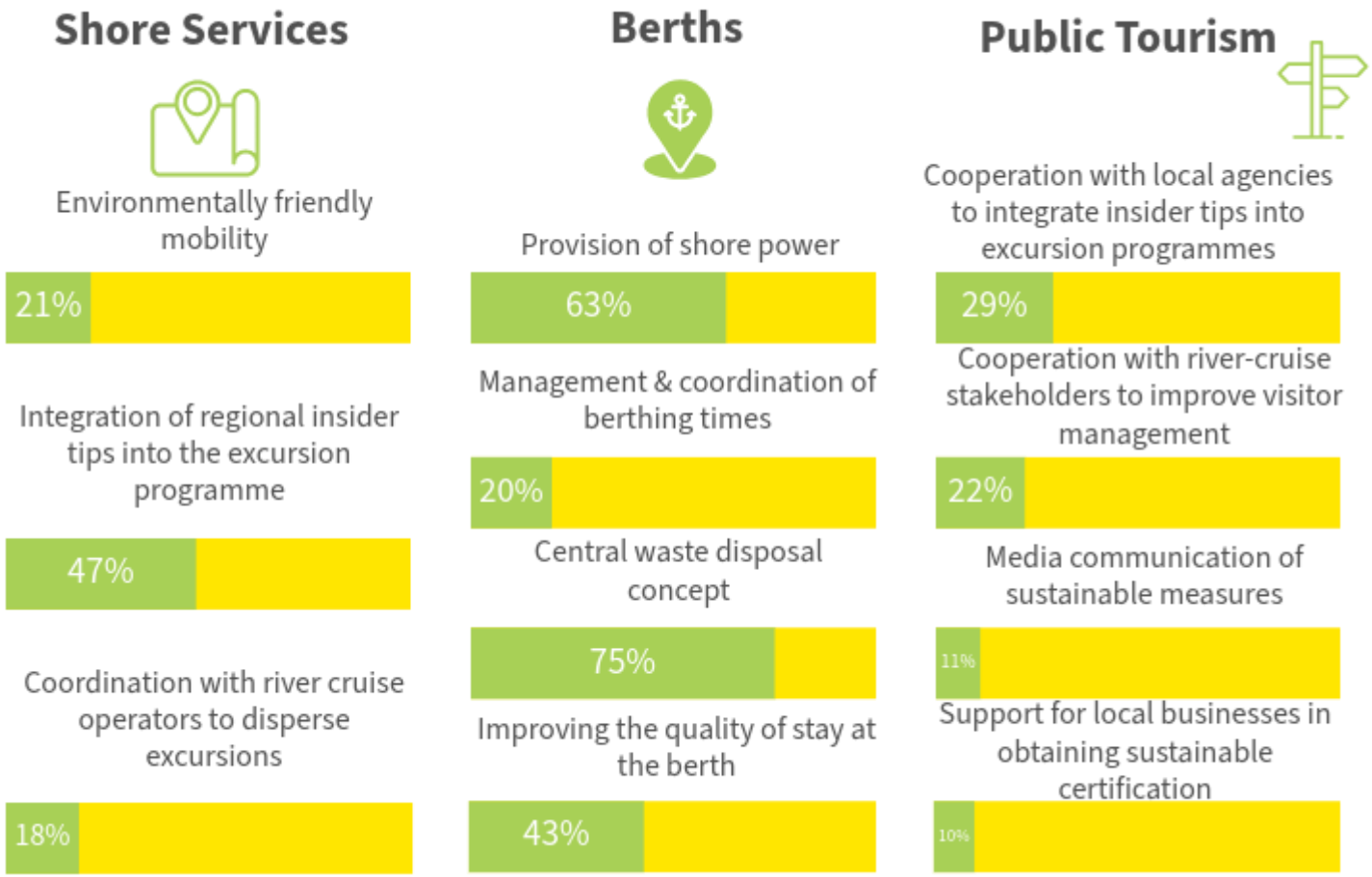


CONCLUSION

- On the river-side, initial important steps toward sustainability have been taken—such as in **shore power usage and waste management**.
- Many measures, however, are still in **the implementation or planning phase**, particularly in the areas of **sustainable propulsion technologies, regional value creation, and social cooperation**.
- Overall, it is evident that **sustainability has entered the consciousness**, but it is **not yet embedded across the board**.

Sustainability Along the Danube: River-Side

F12_L To what extent are you already implementing the following sustainability measures in your area of responsibility?
Base: Land-side stakeholders| green: mostly implemented; yellow: partially implemented or in planning & not yet



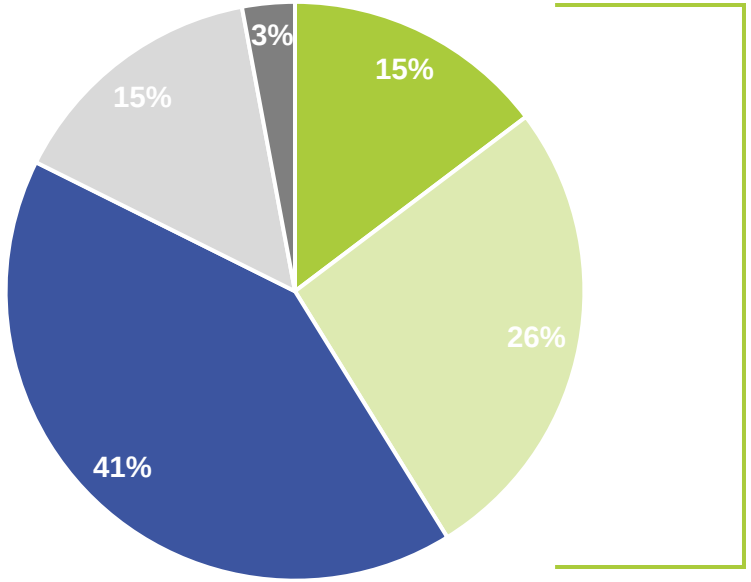
CONCLUSION

- On the land-side, sustainability measures are **already being implemented**, particularly in **shore power and waste management**.
- At the same time, visitor management, cooperation with cruise operators, and the integration of sustainable excursion offerings show a **clear need for further action**.
- Many initiatives are **in planning**, but they are **not yet implemented across the board**.

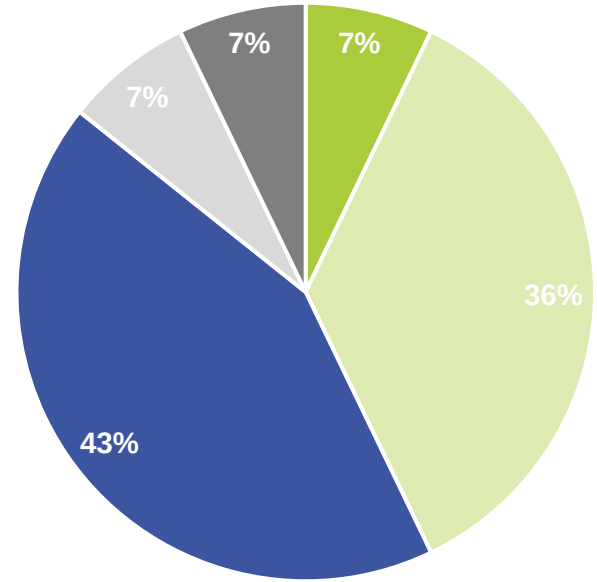
Strong Interest in Sustainability but Limited Willingness to Pay

F13_1 In your opinion, do sustainable measures generally have an influence on your guests' decision to book river cruises?

Base: River-side stakeholders who market river cruises| n=34

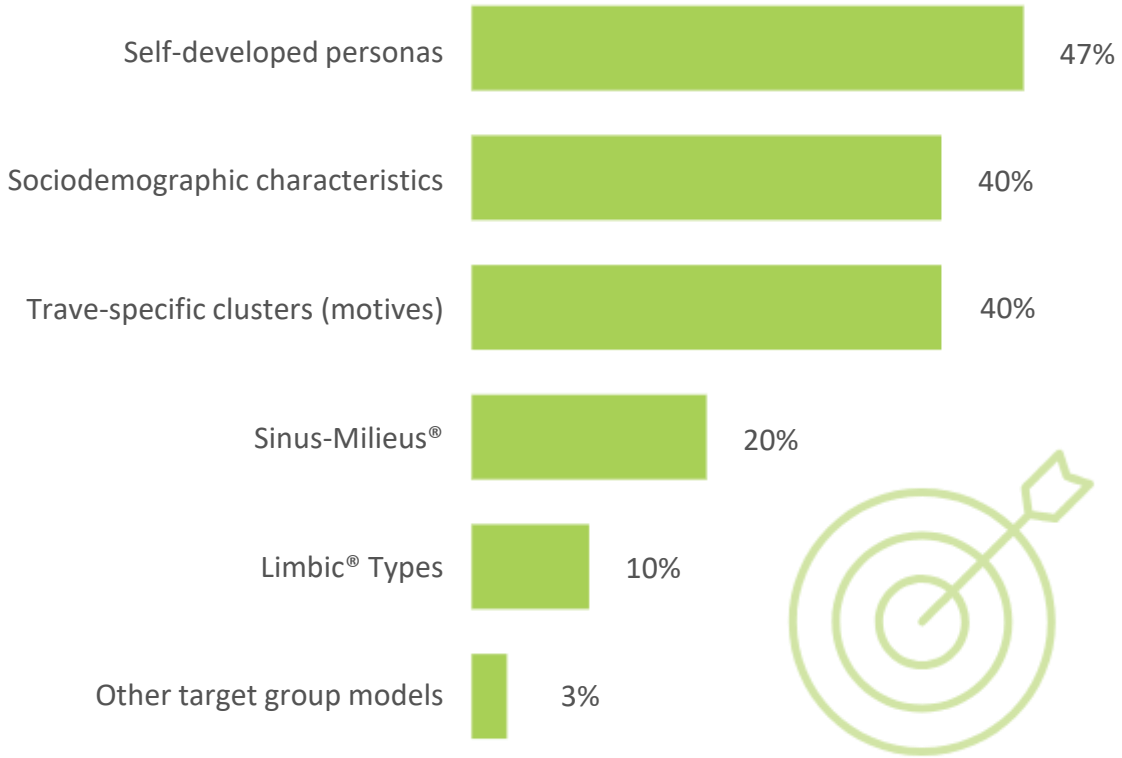


F13_2 If sustainable measures are relevant to bookings, do you think these guests will be willing to pay a premium for them? (n=14)



Basic Target Group Models…

F15_1 Which target group models do you use in the development and marketing of river cruises?
Base: River-side stakeholders who market river cruises| n=30, including 10 cases of “don’t know” or “no answer”



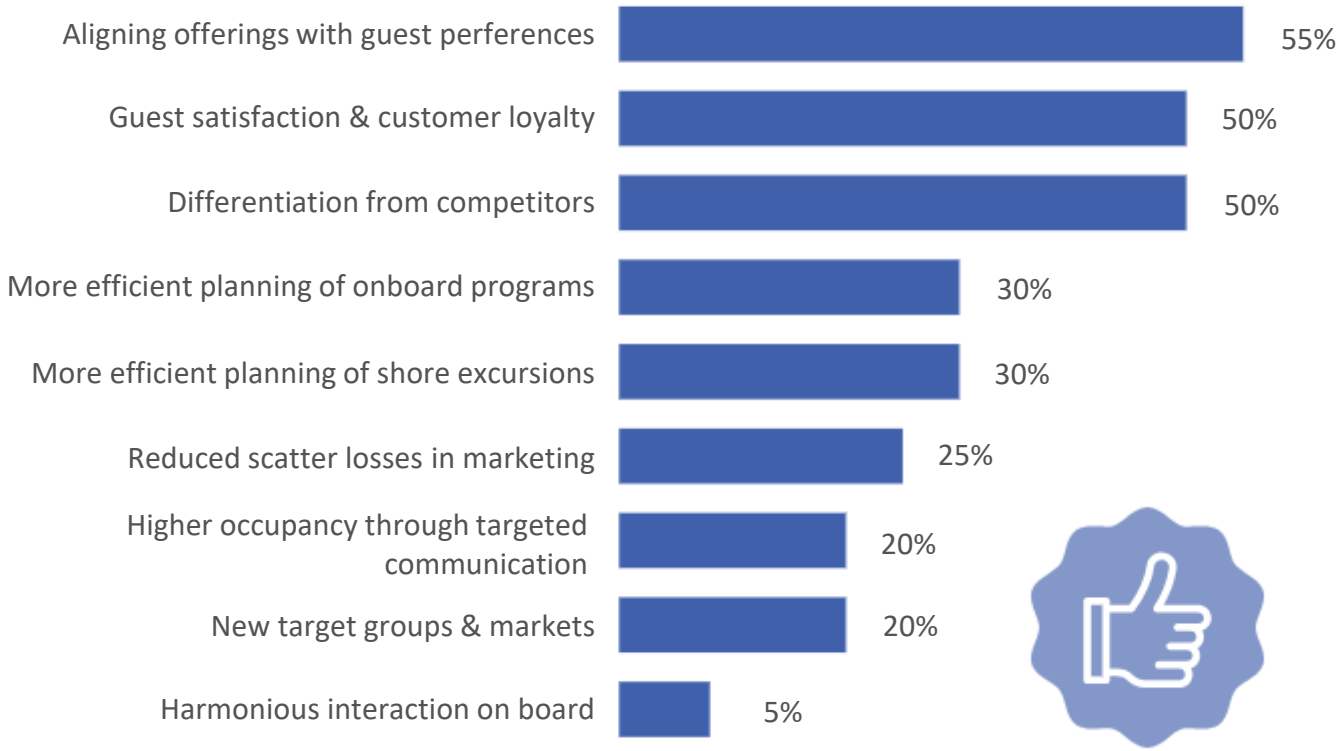
CONCLUSION

In river cruising, many providers work with **self-developed personas or travel-specific clusters**, while more complex models such as **Sinus-Milieus® or Limbic® Types** are used significantly less.

… as the Key to Tailored Products and Satisfied Guests!

F15_2 What opportunities or expectations do you associate with the use of target group models in the product and offer development of river cruises? (Multiple responses possible)

Base: River-side stakeholders who market river cruises| n=20, including 1 case of "no answer"



CONCLUSION

Target group models are seen primarily as an **opportunity to better align offerings, strengthen differentiation, and increase guest satisfaction**.

Culture and Knowledge as Main Motives – Complemented by Culinary Experiences and Authenticity

F16 In your experience, which travel motives particularly appeal to your guests? (Multiple responses possible)

Base: River-side stakeholders | n=31, including 3 cases of "don't know" or "no answer"

74%
Culturally significant cities & sights

53%
Guided excursions with in-depth background knowledge

47%
Regional cuisine, wine & culinary experiences

41%
Enjoying scenic landscapes from the water

38%
Authentic encounters with locals

29%
Insider tips & visits to lesser-known places

29%
Themed-based cruises

27%
Exploring UNESCO World Heritage sites

27%
Gentle, active experiences

27%
Relaxation & recreation on board

CONCLUSION

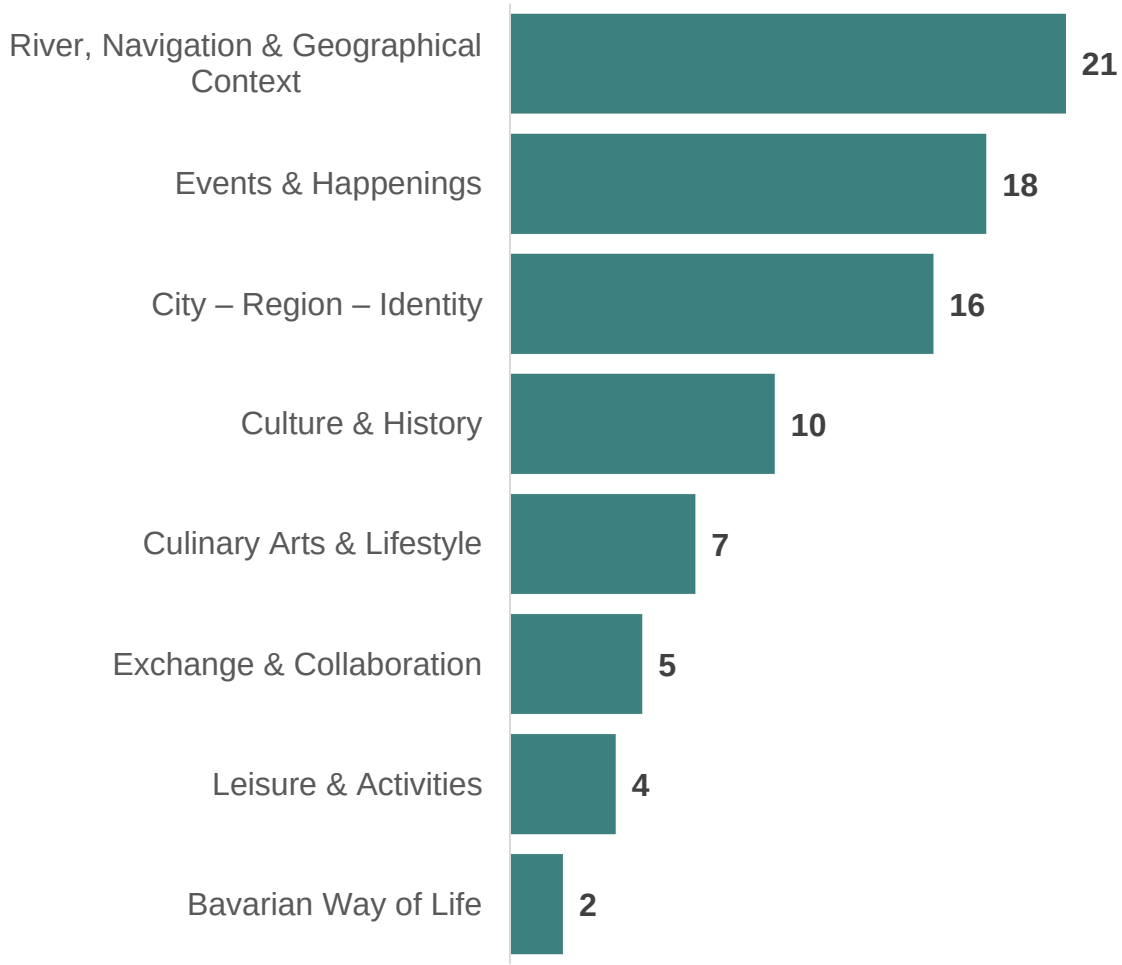
The main travel motives of river cruise passengers are **cultural experiences and in-depth background knowledge**. In addition, **regional cuisine, scenic experiences**, and **authentic encounters** play a central role in creating a holistic travel experience.

Last Question…

What do you associate with Straubing?

Straubing-Associations (Categories)

F17 And now one last question: What do you associate with Straubing?| 83 mentions by 149 respondents



The results are now available at

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

Thank you for your attention!

Panel-Registration

Would you like to become a part of our industry panel?

→ Simply scan the QR-Code and register now!

CENTOURIS

Schloss Neuburg
Am Burgberg 8
94127 Neuburg am Inn

Postanschrift
Universität Passau
CENTOURIS
94030 Passau

Tel: 0851 509 – 2431
E-Mail: centouris@uni-passau.de
Web: www.centouris.uni-passau.de

PROJEKTMANAGEMENT

Brigitte Franz
Tel: 0851 509 2173
E-Mail: brigitte.franz@uni-passau.de

Source of pictures: Adobe Stock